

# BORDEAUX EN PRIMEUR 2025

*A Vintage of  
Precision and Power*



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As the wine world descends on **Bordeaux** for the annual **En Primeur** tastings, it's no exaggeration to say that this year's campaign is the most anticipated in a number of years – and potentially the **most pivotal** in a generation.



It is no secret that, in line with most luxury goods, the fine wine market has been lacking a little energy of late. And Bordeaux, with its reliance on the En Primeur 'futures' market – which requires collectors to purchase wine in advance of it being bottled and shipped, in effect speculating on its likely quality and demand – has been more affected than most.

Since the trio of top-quality vintages in 2018, 2019 and 2020, recent Bordeaux vintages have been challenging for consumers and producers alike. 2021 was patchy in terms of quality; the stellar 2022s had no such issues, but producers got carried away with pricing and scared off the market; 2023 saw decent quality but huge volumes, so there was no urgency to buy; and the wet 2024 was not a vintage that attracted critical acclaim. Add all this together, and it makes for an almost existential threat to the en primeur model as a whole.

Over recent months, devotees of the system looking for reasons for optimism have been buoyed by the fact that **vintages ending in a '5'** have traditionally been stellar – a trend that goes right back to the now almost mythical 1945. And while superstition is not something on which to base a buying strategy, it is certainly true that, in more recent times, it is not just the 'fives' that have yielded benevolent Bordeaux vintages.

Five-yearly intervals have also been rewarding, with 1990, 1995, 2000, 2005, 2010, 2015, 2020 all being highly regarded years.

More exacting analysts will be happy to know that there are concrete reasons to suggest **2025** will continue the pattern. As producers take the wraps of the wines for the trade and critics to taste, early signs are pointing in a more positive direction. There is no doubt that, speaking very broadly, 2025 will be an above-average year in terms of quality – far better than 2024 and, most likely, 2023. Volumes, though, are small, which while not great news for producers will provide collectors with some incentive – particularly when it comes to the harder-to-access wines at the top of the market. Most importantly, insiders are suggesting prices will not be hugely different to 2024 – most likely with a modest increase at the top-end – but for much better quality. Put all those elements together, and you've got all the ingredients for an attractive prospect.

Looking in more detail, the vintage conditions provide an outline of the wines' likely character. The hot, dry summer yielded fewer and smaller grapes, with the overall yield expected to be around 15% below the five-year average (**2025** could end up being the smallest vintage since 1991). The unrelenting heat peaked with one of France's hottest ever Junes (second only to 2003 since records began in 1900), with weeks of temperatures above 35°C. August was similar: 10 days above 35°C, reaching 40°C in places. Mercifully, however, overnight temperatures were consistently cool, creating a high diurnal range, a quality that tends to bring balance and less overt ripeness to wines. A timely dose of rain in late August and early September eased vine stress, further moderating potential alcohol levels, while the major rain events of the season were relatively localised, and the risk of damage from storm and disease minimal.

The upshot is that the wines seem to boast freshness to balance their exuberance. Alcohol levels are notably moderate – mostly around 13% and rarely breaching 14% – a further indication of welcome equilibrium. Early tasters, such as Georgina Hindle at Decanter magazine, report expressive aromatics, ripe but not aggressive tannins, high acidity and cool rather than opulent fruit profiles. Oak is largely dialled down, as per the prevailing fashion, yielding bright concentration and intensity of flavour but without heaviness. The ripe tannins and exceptional concentration encase juicy, delicate and finessed wines that belie the record-breaking heat.



Within this, of course, there will be regional nuances, perhaps more so than usual. Edouard Moueix, who runs the hugely influential negociant business Ets. **Jean-Pierre Moueix**, told us: 'What I've tasted so far suggests the difference between the Left Bank and Right Bank is more exaggerated this year. The elegance and controlled power on the Left Bank versus full-bodied and rounded juiciness on the Right Bank.'



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