BORDEAUX

2025



EN PRIMEUR REPORT

TINDAL
WINE MERCHANTS

BORDEAUX 2025 VINTAGE REPORT

What's not to like? The charm of the "5" has done

After the mildew pressure and emotional exhaustion of 2024, Bordeaux needed a vintage with a little generosity. 2025 was not easy, and it was certainly not straightforward, but it has delivered wines of serious definition, aromatic clarity and, perhaps most welcome of all, a return to alcohol levels that sit comfortably below 14% in many cases.

This is also a vintage arriving at a critical moment. Never has the noise around en primeur been louder. Merchants, importers and customers are all questioning whether the system can still work. Bordeaux, however, is nothing if not adaptive. Climate change has shown how vines can adjust to changing conditions; now the Bordeaux trade must show that it can adapt to a changed market.

Expected price reductions on a strong vintage should help. So too will added value, whether through multiple formats, experiences, barrel syndicates or genuine early-purchase advantages.

But the central question remains simple: will the pricing be right?

Pontet-Canet has already set the tone. Released at 2019 pricing, and widely regarded as one of the wines of the vintage, it sold through quickly in many markets. That is the clearest signal Bordeaux could have asked for. If others are wise enough to follow, 2025 may yet prove to be not only a successful vintage in the vineyard, but a meaningful reset for en primeur.



CHÂTEAU PAVIE

THE GROWING SEASON

The facts of the vintage are relatively clear. 2025 was warm and dry, but not without relief at crucial moments. The vines entered the season with useful water reserves from the high rainfall of 2024, although reserves were down thanks to the previous year's intense mildew pressure. Budburst came early, two to three weeks ahead of average in some areas, with Pontet-Canet recording budburst on 7 April.

Warm conditions at the end of April and into May led into a settled flowering period, giving the vintage a promising start. From there, however, drought became the dominant theme. Between 1 May and 28 August, normal rainfall would be around 180mm; in 2025 it was on average 90mm. Short bursts of rain at the end of June and again in mid-July gave some respite, but water stress became increasingly severe as August progressed.

The heat spike of mid-August was one of the defining moments of the year. In Saint-Émilion, temperatures between 15th and 17th August reached extreme levels, with hot winds compounding the stress. Cheval Blanc recorded its highest ever temperature at 41.6°C. At Troplong Mondot, the western edge of the estate was particularly affected, with significant fruit loss in the most exposed parcels.

Then came the rain. Storms at the end of August broke the heat spell, bringing much-needed water and allowing vines that had stalled under hydric stress to resume ripening. At Durfort-Vivens, Claire Villars-Lurton described the rain of 28 August as crucial in carrying phenolic ripeness over the line. September then brought cooler conditions, helping to preserve freshness and aromatics.

Harvest decisions varied widely. Pontet-Canet began with Merlot on 2 September, followed by Cabernet Sauvignon on 15 September, Cabernet Franc on 17 September and Petit Verdot on 23 September. At Phélan Ségur, Merlot was already tasting ready at the end of August, but the team waited until after the rain and then moved quickly, bringing in the Cabernet Sauvignon over just two days



CHÂTEAUX PONTET-CANET



CHÂTEAU LATOUR

IN THE WINERY

If there is one technical key to 2025, it is tannin.

Berry size at harvest was around 30% smaller than in 2024, with an average weight of approximately one gram per berry. This meant a high ratio of skin to juice, and with it a significant tannic load. As Pierre-Olivier Clouet at Cheval Blanc put it, the elephant in the room this year is tannin. Cheval Blanc's IPT, or total polyphenol index, was 78 in 2025, compared with a more usual 60 to 65.

This explains why the best wines of the vintage are not simply the ripest or the most powerful, but the most carefully handled. Some estates chose longer extraction to encourage polymerisation and soften the tannic frame, particularly where alcohol levels were lower.

Les Carmes Haut-Brion took this approach. Others worked more gently, reducing extraction to avoid hardness from thick skins and potentially green seed tannins.

At Mouton Rothschild, smaller vats were used to reduce the weight of berries pressing down on one another, thereby limiting passive extraction. This kind of detail mattered in 2025.

The vintage was generous in material, but not always forgiving. Where tannins were handled well, the wines have definition, drive and freshness. Where they were not, the structure can feel angular, invasive or dry.

One of the saving graces of the vintage was the moderate alcohol. As Thibault Ricard of Les Carmes Haut-Brion explained, the lower alcohols were not simply the result of late-August rain diluting the berries. In his view, the key factor was reduced photosynthesis under drought stress, which restricted the movement of sugar into the grapes. Lower alcohol also reduced the extraction of less ripe seed tannins during fermentation.



LES CARMES HAUT-BRION



WT & HT @ CHÂTEAU MOUTON ROTHSCHILD

WHOSE VINTAGE WAS IT?

This is not a simple Left Bank versus Right Bank vintage.

Cabernet had an excellent year where water stress was managed and phenolic ripeness completed. The best Left Bank wines show aromatic lift, definition and a certain angular precision that recalls aspects of 2022, but with lower alcohol.

The Right Bank, perhaps surprisingly, also produced some thrilling wines. Merlot is not overblown in 2025. The best examples are heady and perfumed, but also fresh, moderate and succulent. Saint-Émilion often showed finesse and purity, while Pomerol gave some of the most exciting aromatic complexity of the vintage.

The dry whites are a major success.

Some show exotic fruit and generous texture, but the best are pulled back by salinity and drive. As was pointed out at Château Margaux while tasting the textural, exotic Pavillon Blanc, warm years can favour great white wine because there is no need to wait for the phenolic ripeness of skins and seeds in the way there is for red wines.

The sweet wines may be one of the great stories of the vintage.

Near-perfect botrytis developed strongly in mid-September, bringing glorious botrytis character, purity and energy. If Bordeaux en primeur is to be saved, Sauternes and Barsac are making a big effort in terms of making this a vintage to remember



TROPLONG MONDOT



CHÂTEAU PICHON-LONGUEVILLE COMTESSE DE LALANDE

COMMUNES

SAINT-ÉMILION

Finesse and purity recur throughout my notes on Saint-Émilion. The best wines have silky tannic waves, freshness and perfume rather than sheer weight. From the Moueix stable, Bélair-Monange had an outstanding year. Across the plateau, Troplong Mondot was almost show-stopping in its presence. Angélus has returned to form, showing perfume, composure and a finesse-driven confidence.

There was real intrigue in the aromatics, with some wines giving so much so young. Villemaurine was show-stopping, with filigree mineral tones driving the flavours around the palate. Valandraud, tasted at the same time, was like the wild brother: showing the same genes, but with more Asian spice, crunchy wild berries and flamboyant energy.

POMEROL

Pomerol is particularly exciting in 2025. The wines have aromatic intensity and undulating layers of fruit that suggest years of evolution to come. La Fleur-Pétrus was gorgeously silky and exotic. Certan de May was a standout for me in terms of price-to-quality ratio, while long-term favourite Lagrange Pomerol offered huge approachability and appeal even at this early stage.

La Conseillante stood out for definition and perfume. L'Évangile also performed strongly, balancing freshness, precision and depth, helped in part by the use of foudres and a reduction in new oak to 40%.



CHÂTEAU LA CONSEILLANTE



NEW WINEREY BÉLAIR-MONANGE



CHÂTEAU CHEVAL BLANC



CHÂTEAU LA CONSEILLANTE

MARGAUX

Despite the warmth of the year, cool nights helped preserve aromatics, and Margaux produced some of the most beautifully framed wines of the vintage. Brane-Cantenac, Durfort-Vivens and Labégorce all left a strong impression.

Claire Villars-Lurton was particularly excited by the Cabernet expression at Durfort-Vivens. At Palmer, however, Merlot played an important role in balancing the tannins and bringing fruity lift. This was rooted in the clay soils, which offered greater hydric support to Merlot in a dry year. The result was an unusual reversal in the grape balance between Palmer and Alter Ego, with the second wine carrying a higher proportion of Cabernet than in recent years.



CHÂTEAU DURFORT-VIVENS



CHÂTEAU LEOVILLE BARTON



CHÂTEAU BRANE-CANTENAC

SAINT-JULIEN

Cabernet showed its darker side in Saint-Julien this year. A certain formality seemed to grip some wines, not least Léoville Barton, which held its crunchy fruit tones within elastic tannins and a long, precise finish.

Langoa had definition and a renewed purity, making this a good vintage for the château. Since the new winery was built, Branaire-Ducru has been getting better and better, with a price tag that remains achievable for today's drinker. 2025 is no different. The tannin structure is so elegant it is almost seductive.

PAUILLAC

With the strong Cabernet character of this vintage, Pauillac could not fail to offer some excellent wines. Lynch-Bages was our first visit of Primeurs, with Echo de Lynch-Bages and the Grand Vin setting the bar high. Echo is such good value this year, with fantastic tension and fruit character.

Lynch-Bages itself was one of the best examples I have seen from this estate. Tannins define each of the layers, with mineral notes softened by smoke and spice, yet without losing the elegance and expression of the blend to winemaking. It is a lesson in balance this year.

But hold forth, for the wine of Pauillac for me this year is Pontet-Canet. Like a racehorse back in form, it has that gleaming colour, slightly wild character and superb definition of tannin. This is my bet.

It is the fruit that seems to soften my tasting notes from this commune: wild berries, cassis, redcurrants and plum. Aromatics, but in fruit form. Réserve de la Comtesse has returned this year from a disappointing 2024 with a resounding win. Of the Pichons, however, Baron has the edge in terms of the Grand Vin. While oak is prevalent on the nose, the ample fruit and almost bombastic tannin-fruit life, filled with perfume and promise, suggest a long and exciting future ahead.

SAINT-ESTÈPHE

Saint-Estèphe shows the muscular side of the vintage, but also some impressive refinement where extraction was carefully judged. The mention of intracellular fermentation at Cos d'Estournel shows just how far some châteaux were prepared to go to moderate the impact of thick skins and high tannin potential.

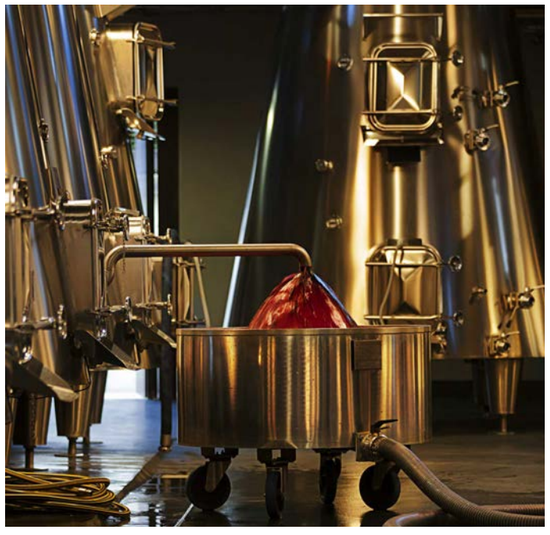
Phélan Ségur continues its upward trajectory, with Frank Phélan looking increasingly smart alongside the Grand Vin.



CHÂTEAU PHÉLAN SÉGUR







AVANT-GARDE VAT ROOM @ COS D'ESTOURNEL

PESSAC-LÉOGNAN

Pessac-Léognan was more mixed for the reds. Les Carmes Haut-Brion was a masterclass in what the vintage could achieve, with dark mineral tones, poise and balance.

Smith Haut Lafitte is undergoing an exciting evolution, with a direction that feels less showy than before, showing more elegance, impossibly resolved chalky tannins and intriguing perfumed fruit. Château Le Thil, just down the road, sits on its own little clay patch, allowing Merlot to shine. This estate has always offered good value, but recently people are starting to notice the characterful and complex expression the wines bring at a reasonable price.

Elsewhere, some examples felt harder to read at this early stage, with darker fruit profiles and tannins that could feel slightly rough. Pessac-Léognan is entering an exciting new phase in the context of climate change, and as ever we would recommend looking closely at our notes from here.

The whites, this year, are excellent. Depending on the château style, they range from exuberant and aromatic to more textural and mineral. Haut-Brion Blanc showed a gorgeous oatmealy hint on the nose, with textural green tones running through the evolving palate.

SAUTERNES / BARSAC

Rain in September brought almost perfect botrytis, which developed fast and cleanly, making 2025 one of the most exciting years for these incredible wines.

If I were to choose one, Suduiraut, picked from 1 to 10 October, carries 158g/l residual sugar but manages to veil this behind incredible apricot perfume, lifted by seamless and endless purity and finesse at the core. There are plenty to choose from this year, thanks to botrytic success across the region.

Increasingly, these styles are being used as an aperitif, something I have certainly become partial to, and can recommend to anyone who enjoys definition, complexity and sweetness carried by a fresh palate.







CHÂTEAU SUDUIRAUT

FINAL THOUGHTS

2025 is not a vintage of effortless abundance. It is a vintage of small berries, thick skins, dry conditions and carefully managed stress. The best wines are not necessarily the biggest, but the most balanced. They have definition, perfume, freshness and moderate alcohol, with tannins that, when well handled, give the wines drive and longevity. There is real charm here, but also structure. The vintage has given us Cabernet with aromatic definition and dark precision, Merlot with perfume and freshness, whites with texture and salinity, and sweet wines that deserve far more attention than they will probably receive. It is not homogenous, and it is not a vintage to buy blindly, but the successes are genuinely exciting.

For en primeur, however, quality alone is no longer enough. Bordeaux must price intelligently. Pontet-Canet has shown that the market will respond when the offer is right, particularly when a wine of real vintage significance is released with confidence and restraint. If others follow, 2025 could become the vintage that helps restore some faith in the system.

Our advice is to choose carefully, follow the pricing, and look for the estates that managed tannin with precision rather than force. There are wines here for the cellar, wines for earlier drinking, and some outstanding opportunities in whites, Sauternes and the better-value names that continue to over-deliver.

For now, the message is clear: 2025 has charm, definition and freshness. If Bordeaux can meet the market, there is plenty to like.

Harriet Tindal MW
May 2026

"2025 is intense, deeply coloured, precise, with remarkable freshness. Nothing was forced, neither in the vineyard nor in the cellar".
Henri Lurton Brane-Cantenac



CHÂTEAU ANGELUS



CHÂTEAU PONTET-CANET



CHÂTEAUX FIGEAC, POMEROL



CHÂTEAU ANGELUS



TINDAL
WINE MERCHANTS

B4 CENTREPOINT, ROSEMOUNT BUSINESS PARK, BALLYCOOLIN,
DUBLIN, D11 KH50, IRELAND
TEL: +353 (0) 1 866 5680 EMAIL: SALES@TINDALWINE.COM

WWW.TINDALWINE.COM