



Increased or decreased demand for products and services, depending on business + -

Changes in customers needs and the timing when products and services are needed + -

Challenges meeting customer demands and strains on business relationships -

Customers struggled to afford inputs and services -

Adjusted pricing models and invoice structures (e.g. reducing prices, supplying products on credit, stock holding and reducing minimum purchase orders) *

Diversified activities and developed, sourced, supplied and marketed new products and services *

Prioritised customers at times of high demand *

Unfavourable weather conditions in 2011, during flower initiation, when the buds for 2012 were developing, leading to low-bunch counts -

Wet weather, high humidity and low levels of sunlight during flowering, fruitset and the growing season -
 Frosty patches -
 Fruit onset was poor, with low amounts of fruit on vines -
 Stunted growth and early losses of fruit -
 High disease pressure -
 Harder to access the vineyard with machinery such as tractors due to wet soils -
 Adjusted approach to pruning, fruit thinning and canopy management (e.g. stripping leaves to support airflow and removing fruit impacted by disease) *
 Adjusted use of fungicides and pesticides (e.g. additional spraying) *
 Used frost protection systems (e.g. bougies) if available *
 Engaged consultants *
 'Cut corners' on vineyard management to save costs *

Increased knowledge exchange with growers and looked for additional grape suppliers *

Wet and cold ripening and harvest period -
 Smaller yields and, in some cases, no viable crop at all -
 Fewer varieties ripened -
 Low quality and uneven quality grapes (some rotten, some underripe) -
 Some difficulties accessing labour (fewer pickers willing to harvest in the rain) -
 Late harvest *
 Used short-term weather forecasting services to identify dry 'windows' to harvest grapes *
 Unripe and poor quality grapes were discarded and some producers left grapes unharvested *

Poorer quality grapes took longer to sort and spoiled more quickly -
 Higher demand for grapes for those who produced a strong crop despite the conditions +
 Tried to process grapes quicker to manage disease pressure and limit time for rotting *

Higher grape prices -
 Challenges accessing grapes for winemaking -
 Poorer quality grapes that took longer to sort -
 Turned away grapes from growers that didn't meet quality requirements *
 Purchased grapes from new, additional or alternative sources *

Low volumes of grapes available for winemaking -
 Low ripeness, low sugar levels and high acidity in grapes made it harder to maintain typicity -
 Focused production on sparkling wines and avoided making still wines *
 Blended wine with juice from previous years, stored wine in reserves to blend with juice in future years and avoided making vintage wines *
 Procured advice from other winemakers and other industry experts (e.g. consultants) *
 Adjusted and experimented with new winemaking techniques to add weight and structure" *
 Adjusted fermentation and ageing processes e.g. left wine to mature for longer in the cellar *
 Adjusted use of additives (e.g. additional chaptalisation/sugar addition) *

Concerns about the quality of the wine from customers -
 Lower amounts of wine available to sell meant that some producers couldn't meet order commitments with distributors and retailers -
 Sold fewer premium wines *
 Put wine on allocation (e.g. prioritising customers) and staggered sales *
 Adjusted prices and passed on some of the additional production costs to retailers *
 Marketed wine differently (e.g. emphasising the skill involved in producing wines under difficult conditions) *

More limited volumes of wine available, from a more limited range of producers -
 Buying wine was more expensive -
 Harder to maintain consistent stocks -
 Purchased less English and Welsh wine and diversified business offerings to rely more on wines from other regions *
 Sourced wines from different or additional producers *
 Did more tastings to ensure quality of wines before purchase *
 Reduced promotions of English and Welsh wines *

Key

Input & service providers

+ Opportunity

Grape growers

- Challenge

Winemakers

* Adaptation behaviours undertaken

Retailers and distributors



Changing customer needs + -

Invested in building relationships and communicating with customers to understand needs, opportunities and challenges *

Expanded and diversified business and developed new products or services *

Adjusted pricing models and restructured processes for managing payments and invoices *

Business relationships strained -

Diversified sites (e.g. growing grapes in new areas of the country) *

Adjusted vineyard management regimes (e.g. pruning regimes, canopy management approaches and vine nutrition) *

Business diversification (e.g. developed new forms of revenue through tourism activities) *

Changes to production strategies to support resilience of soils and vines (e.g. adopted organic methods) *

Introduced new vineyard monitoring regimes and revised mechanisms for communicating yield estimates to customers *

Invested in building business relationships *

Business relationships were strained and some contracts to supply customers with wine in future years were lost -

Adjusted grape production and sourcing strategies (e.g. introducing new quality control measures) *

Adjusted the types of wine being produced and marketed (e.g. non-vintage wines) *

Business diversification (e.g. gin production) *

Invested in relationships with retailers and distributors to maintain customer base *

Made changes to buying and ordering processes *

Adjusted marketing strategies (e.g. highlighting variability as a quality of wine production) *

Invested in relationship building with existing or additional suppliers *

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