

Bordeaux En Primeur 2025

Campaign review and our top picks



The Bordeaux 2025 En Primeur campaign reached its conclusion last week.

When tasted during En Primeur week, the wines were of high quality in and very approachable with great concentration of fruit, well integrated tannins and low alcohol levels. The major critics confirmed the high quality of the vintage, with some notable variations across leading properties.

This is a vintage that should engage with the new generation of wine lovers and traditional Bordeaux collectors alike.

The releases come at a time of timid recovery in the wine market and a challenging geo-political and economic environment.

All eyes were on release prices, with hope- rather than expectations, that these would come at attractive level to generate momentum in what remains a slow market.

Winecube base case scenario, in our [En Primeur report](#) published at the end of April, was for an increase in prices of 5% to 15% vs 2024 release prices.

In the end, many leading estates priced their new vintage within that range and, as we predicted, buyers were very selective.

In the current market, collectors are increasingly comparing new releases against physical back-vintages price, making value the defining theme of the campaign- an approach we have long advocated at Winecube.

A vintage that exceeded expectations

The 2025 growing season presented challenges, yet critics have generally responded positively to the wines. Across the region, many chateaux have produced wines that combine freshness, precision and structure, with several estates earning scores that place them comfortably among the strongest releases of the last decade.

The quality narrative has therefore been relatively straightforward. The more interesting story was the low yields (-20 to 40% at top Chateaux) which made for a good scarcity & collectability narrative.

This was very true for a few Grand Cru Chateaux like Cheval Blanc where production was lower by 50%, but in the current climate, price & relative value have become just as important as critic scores and availability.

Value remains the defining theme

The defining characteristic of the Bordeaux 2025 campaign has been the focus on value.

Many estates responded to softer market conditions by aligning release prices to most recent vintages current market prices. In several cases, these reductions have been significant enough to attract renewed interest from merchants and collectors alike.

Yet lower pricing alone does not guarantee success and we as always, we evaluate long term potential for value increase for the wines we select for our clients' collections.

For Winecube the most successful releases are those able to demonstrate a compelling value proposition relative to comparable back-vintages, a quality/price ratio that justifies securing an allocation and those with the highest probability to deliver increase in price over the long- term horizon.

Winecube Bordeaux 2025 En Primeur selection process

Our multi criteria valuation model led to a stringent selection – Out of our chosen collectible universe of 100 Bordeaux fine wine we only selected 21 En Primeur 2025 releases to allocate to our clients' portfolio.

There are many wines to like in 2025, but we predict that few will be more expensive to buy at time of bottling in 2028. Some might be difficult to buy again altogether then, but there are plenty of highly rated vintages to choose from between 2015 and 2025, notably 2016, 2019 and 2020. We advocate smart capital allocation.

We also established a “watch list” of releases which were very close to make the selection we will continue to monitor pricing of these and, should the opportunity to buy at compelling price arise, we will secure those wines. Drop us a [mail](#) here to be first on the allocation list!

Finally, we believe that some 2025 releases will be very enticing and enjoyable very soon after bottling at a price point which makes sense from a consumption perspective.

Winecube 2025 En Primeur conviction Buy List

Chateau	Vinous score	Wine Advocate Score	Neal Martin Score	Bottle price	Price per 6	Winecube decision	Rationale for buying
Cheval Blanc	96-99	98-100	95-97	£335	£2,010	Strong buy	Production down 50%, Great scores and a compelling release price vs current vintages on the market
Cos D' Estournel	96-99	96-98	95-97	£85	£510	Strong buy	The cheapest Cos En Primeur release in 10 years and very high scores.
Lafite Rothchild	97-99	95-97	98-100	£347	£2,082	Strong buy	A very competitive release price versus other vintages on the market. A potential perfect 100 point score from critics, this Lafite will also perform as a good investment in the long run. A very compelling addition to any collection
Batailley	95-97			£25	£145	For enjoyment	A very high scoring classified Pauillac which will delight in early and late drinking window for £25 just a bottle.
Gruaud Larose	95-97	94-96	93-95	£43	£258	Strong buy	A stunning Gruaud released at a very compelling price with a 300th anniversary special botting. Built for longevity at what we see as great entry price
La Gaffeliere	97-99	90-92	95-97	£39	£234	Value buy	A "phenomenal" wine according to wine critic Antonio Galloni who scores it 97-99 released at £39 a bottle. St Emilion of this quality will no doubt command a much higher price in the future.
Mission Haut Brion	97-99		94-96	£145	£870	Strong buy	This Mission 20025 is the cheapest release from the estate in 10 years (same as 2024 which has a much lower score) at a price matching any of their existing vintages. It is a superb wine with a massive 97-99 from both Vinous and Wine Advocate. This wine competes against any of the First Growths in quality but is half the price
Reserve Comtesse	90-92	90-92	90-92	£30	£180	For enjoyment	The superb Second Wine from Pichon Lalande. Pure elegance at a bargain price. Don't miss
Mouton Rothschild	96-98	97-99	95-97	£304	£1,824	Strong buy	Mouton is on a roll and their 2025 is refined and unique. A benchmark release in small quantities, very keenly priced with great long term potential
Carmes Haut Brion	96-98	95-98	95-97	£72	£429	Strong buy	The best scored Carmes Haut Brion except 2022. Demand for the estate is high and it is released at a discount to existing vintages. The quality is superb and it's the best opportunity to secure it on good terms
Brane Cantenac	95-97	93-96	95-97	£40	£237	Value buy	Great price for a critically acclaimed vintage. Same release price as 2015 En Primeur 10 years ago. Load it up.
Clinet	94-96	93-95	96-98	£45	£270	Strong buy	Highly scored by Neal Martin at 96-98 and released below £300 per 6 this is a true bargain in this vintage. Buy
Ducru Beaucaillou	96-99			£90	£540	Strong buy	One of the highest scored Ducru vintages released at a discount to any other quality vintages available in the market.
Pavie Macquin	95-97			£42	£249	Value buy	A high quality vintage for the estate which comes well priced at just over £40 a bottle, making it the cheapest vintage of that quality . No hesitation
Haut Brion	96-98	98-100	98-100	£278	£1,668	Strong buy	Haut Brion 2025 has the potential to be a perfect "100 " points wine once bottled and it is available at the cheapest price point of any similar vintage from this top estate. 2025 is just superb and the price is right.
Figeac	96-98	97-99	96-98	£115	£690	Strong buy	Perfectly priced and a stellar vintage for an estate which has been delivering outstanding wines for the past 5 years.
Montrose	95-97	98-100	98-100	£103	£618	Strong buy	Might be the wine of the vintage, the critics are aligned. It is also the best priced highly scored Montrose in the market. Great potential for increase in price once bottled.
Dame Montrose	91-93	91-93	90-92	£27	£162	For enjoyment	Montrose quality at a fraction of the price. What's more to say?
Leoville Las Cases	96-98	96-98	96-98	£110	£660	Strong buy	Priced to what we consider fair value. It ranks high in quality within the last 10 vintages and released at a slight discount to market. This is an estate with huge pedigree and demand: buying quantities will be hard later.
Vieux Chateau Certan	93-96	94-96	95-97	£135	£810	Speculative buy	Priced at a good discount to available vintages but divided critics: we thought it was a spectacular wine, so did Neal martin. We are betting this will be upgraded in the years to come and rate it as a buy
Margaux	97-99	97-100	96-98	£339	£2,034	Strong buy	2025 Margaux is right up there in quality and released at a very competitive price versus the market for existing vintages. A compelling combination.

Chateau Mouton Rothschild

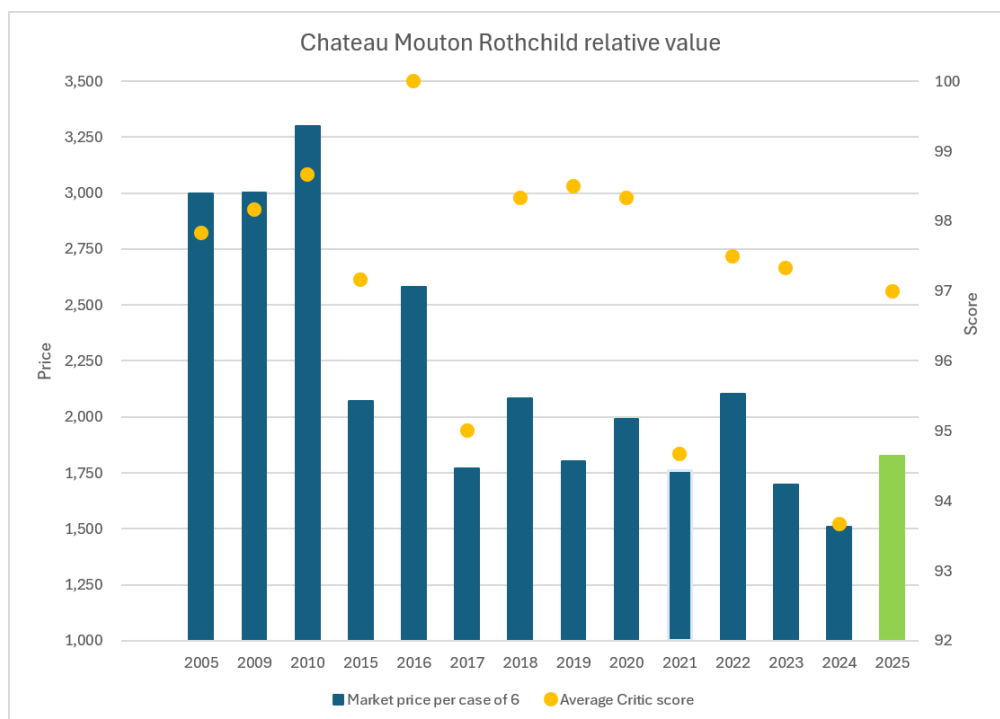
£1,824 per 6

Among the campaign's most anticipated releases, First Growth Chateau Mouton Rothschild 2025 arrived with considerable excitement.

For the first time in the estate's history, the Grand Vin is composed of 98% Cabernet Sauvignon and just 2% Merlot, making it one of the purest expressions of Cabernet Sauvignon ever produced at the estate.

Critics have responded enthusiastically. Neal Martin awarded the wine 96-98 points, describing it as a "quintessential Mouton Rothschild" that should age exceptionally well in bottle.

William Kelley scored the wine 97-99 points, highlighting its remarkable intensity and concentration: *"It's unquestionably a beautiful Mouton in the making, and this château continues to fire on all cylinders."*



For collectors, as a benchmark expression of Cabernet Sauvignon from one of Bordeaux's most celebrated estates, the 2025 release presents a compelling proposition.

Strong BUY

Château La Mission Haut-Brion

£870 per 6

Chateau La Mission Haut-Brion 2025 was released at a level that compares favourably with past vintages, making it one of the more attractively positioned wines among the leading Left Bank estates.

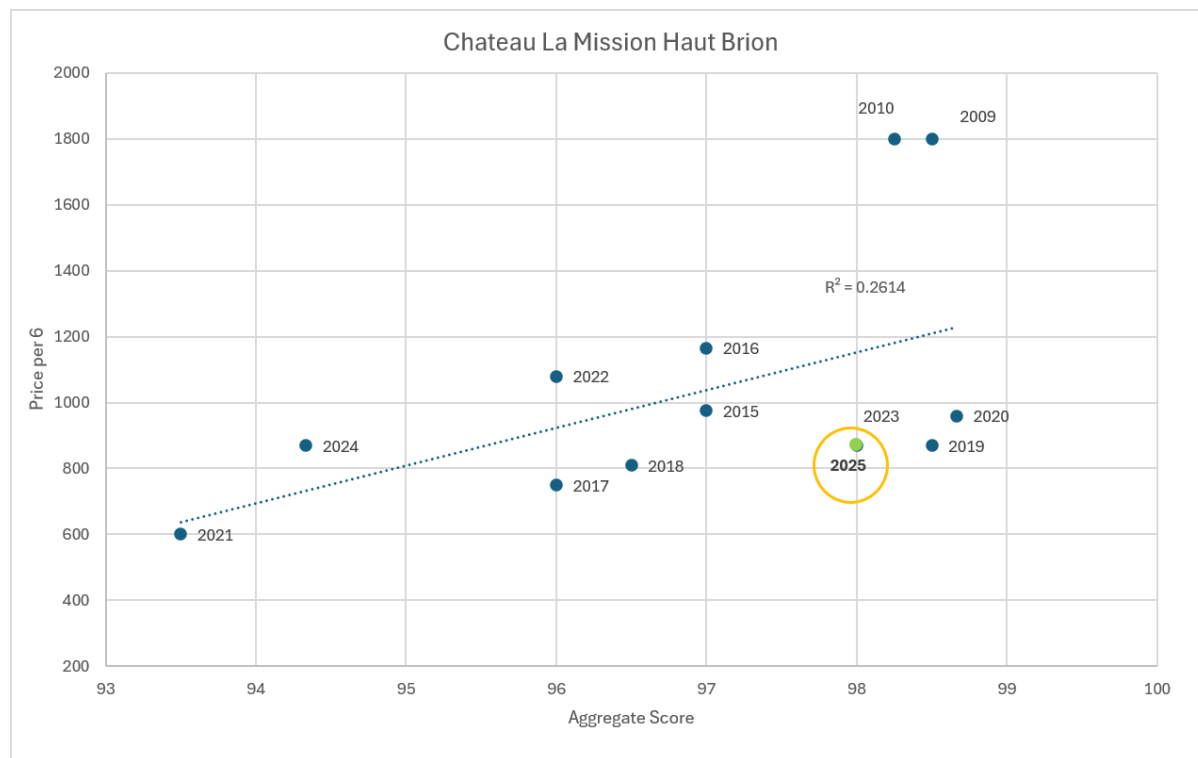
Critical reception was positive. Antonio Galloni was very enthusiastic, scoring it 97-99 points and describing it as “magnificent”:

97-99pts Antonio Galloni, Vinous *“The 2025 La Mission Haut-Brion is one of my early favourites in this vintage. Aromatic and vibrant, with striking purity, the Grand Vin is magnificent. Red-toned fruit, blood orange, pomegranate, mint and cinnamon soar from the glass. Beams of supporting tannin lend energy and shape. In a word: compelling. One of the wines of the vintage.”*

It is remarkably close to the top First Growth estates in quality and probably a lot more approachable in 2025.

At £870 per 6 the value proposition is very clear as per chart below:

Strong BUY



Chateau Cos D'Estournel

£510 per 6

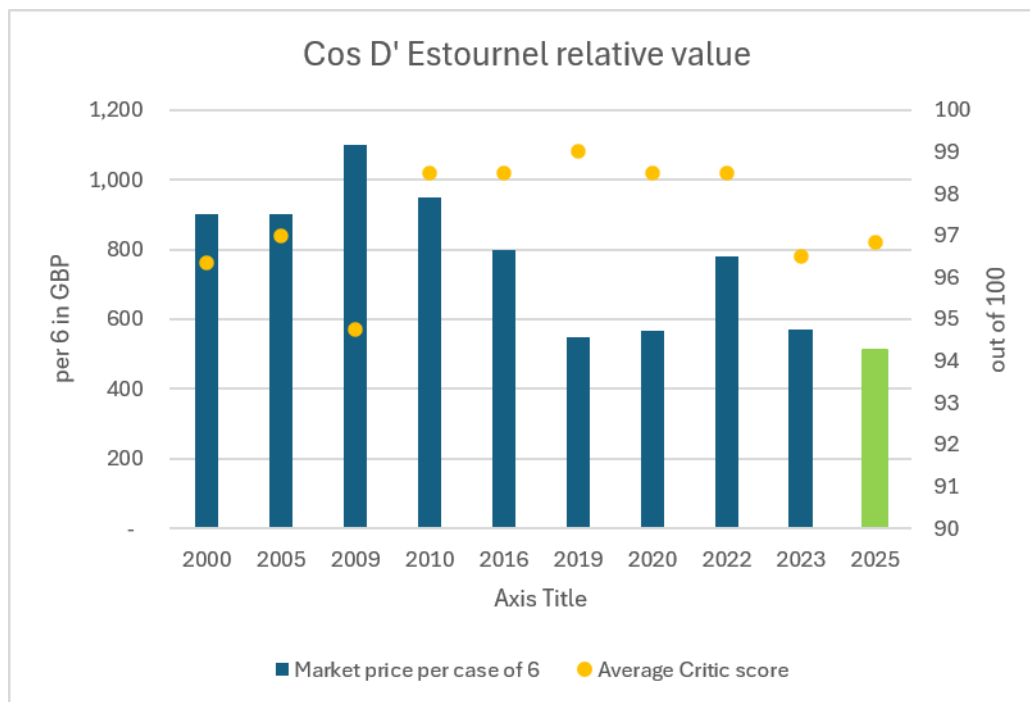
Released at the same price as the 2024 vintage as the cheapest release in ten years, this is as good as it comes.

This 2025 release is attractive for two reasons: strong scores from the major critics and a price that offers great relative value vs existing benchmark vintages. This should anchor it and it provides an opportunity to buy with both limited downside and good potential for price increase in the future. We like the combination of probability of investment returns and a benchmark quality vintage from a collecting point of view.

"The 2025 Cos d'Estournel is shaping up to be one of the wines of the vintage. Grand, dramatic and sweeping, with notable textural intensity. A masterpiece"

97-99 pts Antonio Galloni, Vinous

Strong BUY at this price as per our relative value chart:



Cheval Blanc

£2,010 per 6

One of the wines of the vintage and certainly a very impressive 2025 from this prestigious property. The yield this year was tiny at 15 hectolitre/ hectare (vs an average of 30-32 hl/ha) which means a 50% reduction of bottled wine compared to a normal year.

Scarcity will create tension on pricing in the future as this is a very high scoring, potentially perfect Cheval Blanc (Wine advocate score is 98-100).

Released at £2010 per 6, it is the cheapest Cheval Blanc of that calibre in the market-

Strong BUY recommendation from us as an investment and should feature in every collector's portfolio but there will not be enough for everyone!

Vintage	Average Critic score	Market price per case of 6
2000	97.5	4,100
2005	98.3	4,200
2009	98.3	4,100
2010	97.3	4,200
2016	99.3	2,980
2019	99.3	2,200
2020	99.0	2,000
2022	98.0	2,250
2023	99.5	2,100
2025	97.5	2,010

Chateau Lafite Rothschild

£2,082 per 6

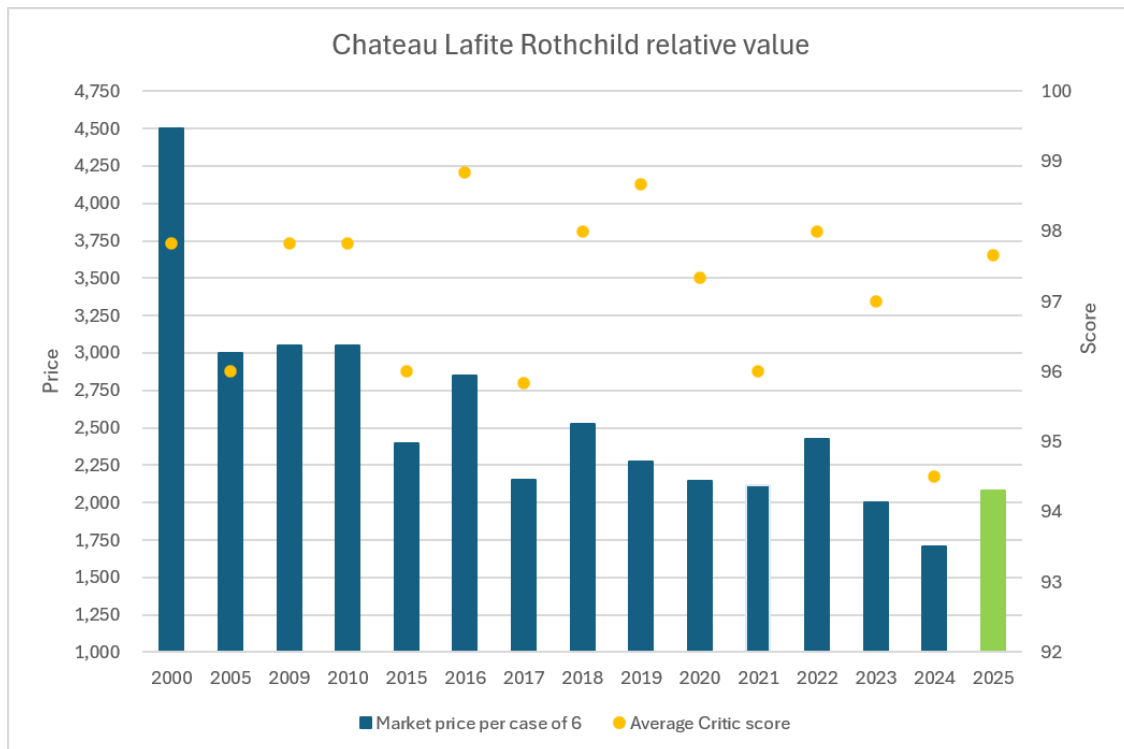
There is no doubt that this is one of the wines of the vintage quality wise (together with Chateau Margaux, Haut Brion, Montrose, Cheval Blanc and Figeac). This is a collector's must have, scored 98-100 by top critic Neal martin.

However, what makes it a Winecube absolute no brainer is the release price of £2,082 per 6 bottles. It is the best priced Lafite vintage of this calibre-

It has a very high potential to increase in value by the time in its bottled – Fair value is at £2,400 (20% above current price).

With the benchmark vintages 2005,2009,2010 and 2016 trading at £3,000 per 6, we think 2025 represent excellent value and strongly advise buying – Production is down by 30% compared to an average vintage so scarcity will support price increases.

Strong buy recommendation from us as an investment and should feature in every collector's portfolio. **Strong BUY**



Chateau Gruaud Larose

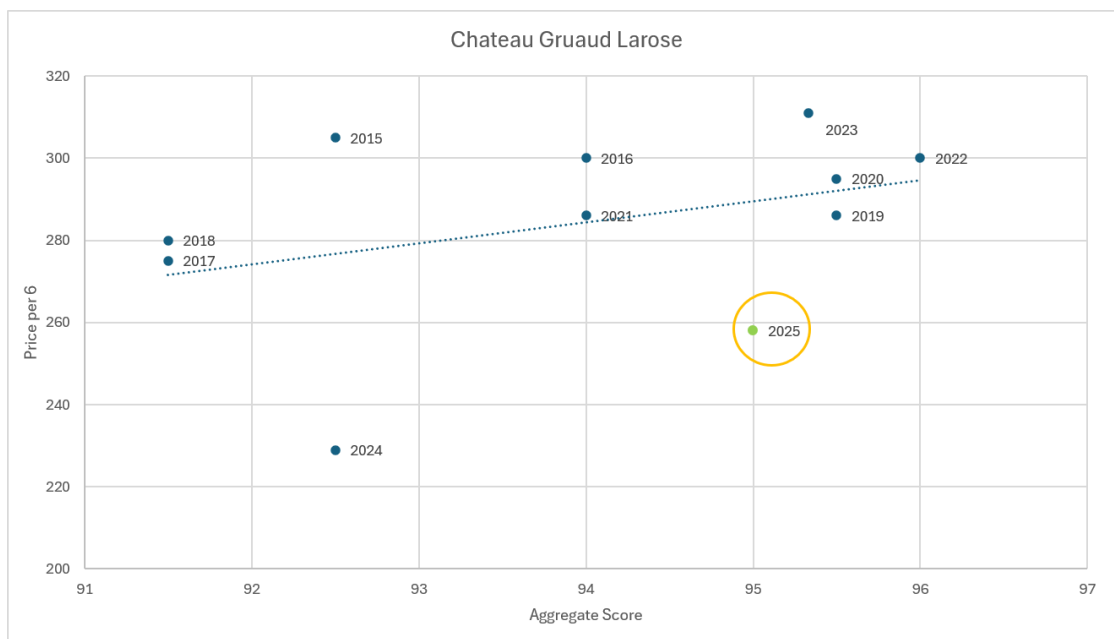
£258 per 6

High quality and scores, a special bottling for the 300th anniversary of the estate and a compelling release price at a significant discount to fair value. This is a perfect combination.

Strong BUY

“This beauty stopped me in my tracks with its sheer class and purity. This is a heavenly Saint-Julien that brings the richness of the vintage alongside an unmistakable sense of class. Bravo!”

97-99pts Jeb Dunnuck



Chateau Montrose

£618 per 6

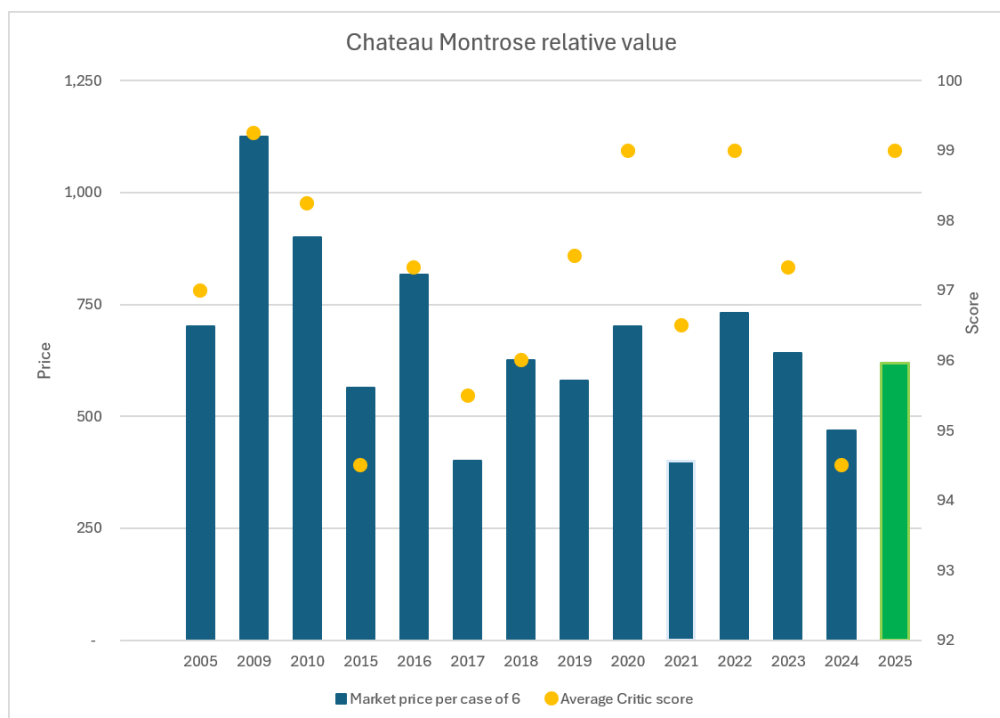
Might be THE wine of the vintage, the critics are aligned in their opinion. We were absolutely mesmerised by the quality when tasting in April.

It is also the best priced highly scored Montrose in the market with great potential for increase in value once bottled and highly collectible- 2009 and 2010 are now trading at £1100 and £900, respectively.

"Montrose is on quite the run. Just when you think they cannot produce a better wine, they come out with the 2025!" **98-100 Jeff Leve, The Wine Cellar Insider**

"This is a Montrose that will rank as one for the ages. Wow (again)" **98-100 Neal Martin, Vinous**

Strong BUY



Chateau les Carmes Haut Brion

£ 429 per 6

The best scored Carmes Haut Brion bar the exceptional 2022.

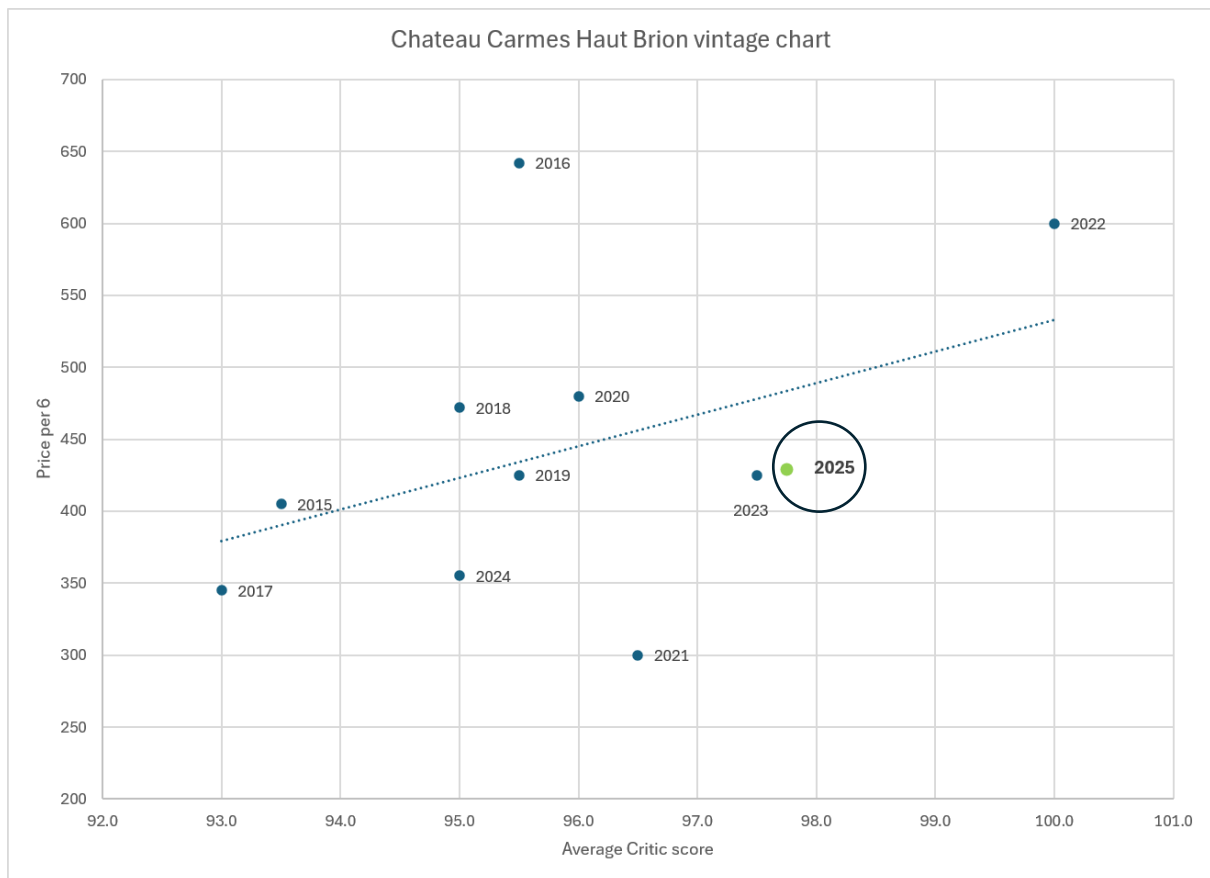
Demand for the estate is high, and it is released at a discount to existing all existing vintages of this quality and below fair value.

The quality is superb and it's the best opportunity to secure this wine on good terms.

"Clearly, this is in competition with the best vintages the estate has ever produced."

98-100 Jeff Leve, The Wine Cellar Insider

Strong BUY



Chateau Ducru-Beaucaillou

£540 per 6

One of the highest scored vintages from this estate, released at a discount to every other quality vintage available on the market. No brainer

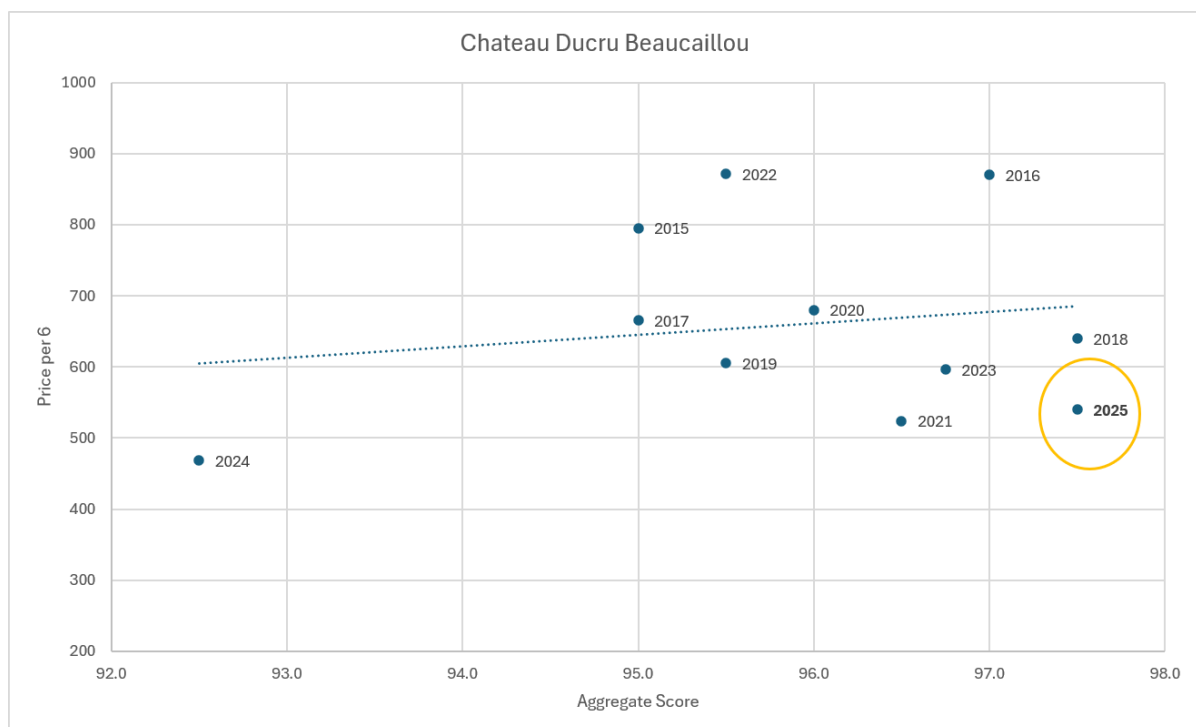
The Ducru-Beaucaillou 2025 En Primeur at £90 per bottle is genuinely attractive relative to comparables:

- 2019: -12.03%
- 2020: -23.14%
- 2022: -54.44%
- 2016: -61.11%

Strong BUY

“The 2025 Ducru-Beaucaillou is fabulous. The purity of the fruit is just remarkable. Superb, and one of the highlights of the year, Ducru is absolutely stunning in 2025.”

Antonio Galloni, Vinous 96-99pts



Chateau Haut Brion

£1,668 per 6

Haut Brion 2025 has the potential to be a perfect "100 " points wine once bottled and it is available at the cheapest price versus similarly rated vintage from this top estate.

It stands as one of the more impressive Haut Brion of recent years and could be right up there with 2009, 2010 and 2016. All trading at significant premiums.

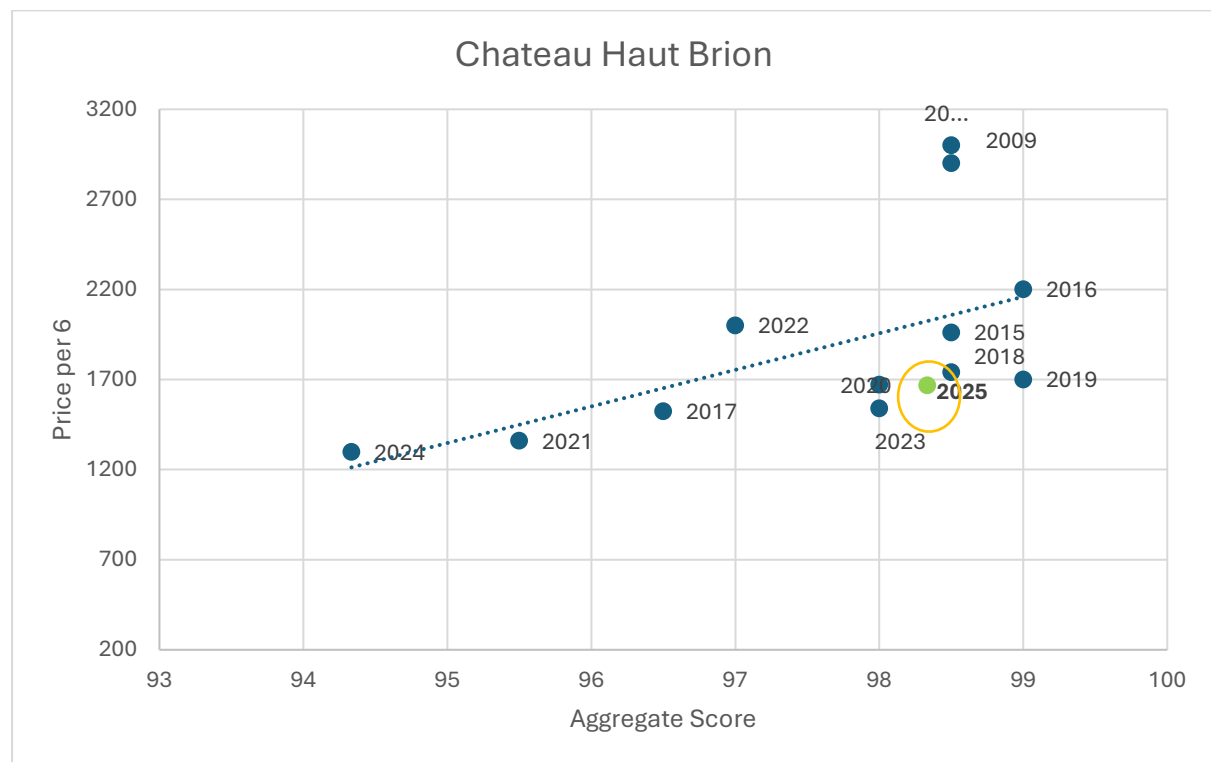
2025 is just superb and the price is right. **Strong BUY**

"Wonderful delineation... complexity... depth and minéralité." **Neal Martin 98-100pts**

"Its purity, concentration, and overall sense of class are riveting" **Jeb Dunnuck 97-100pts**

"It stands as one of the more impressive renditions of Haut-Brion in recent years." **98-100pts**

Yohan Castaing Wine Advocate



Chateau Figeac

£614 per 6

Perfectly priced benchmark vintage for an estate which has been delivering outstanding wines for the past 5 years.

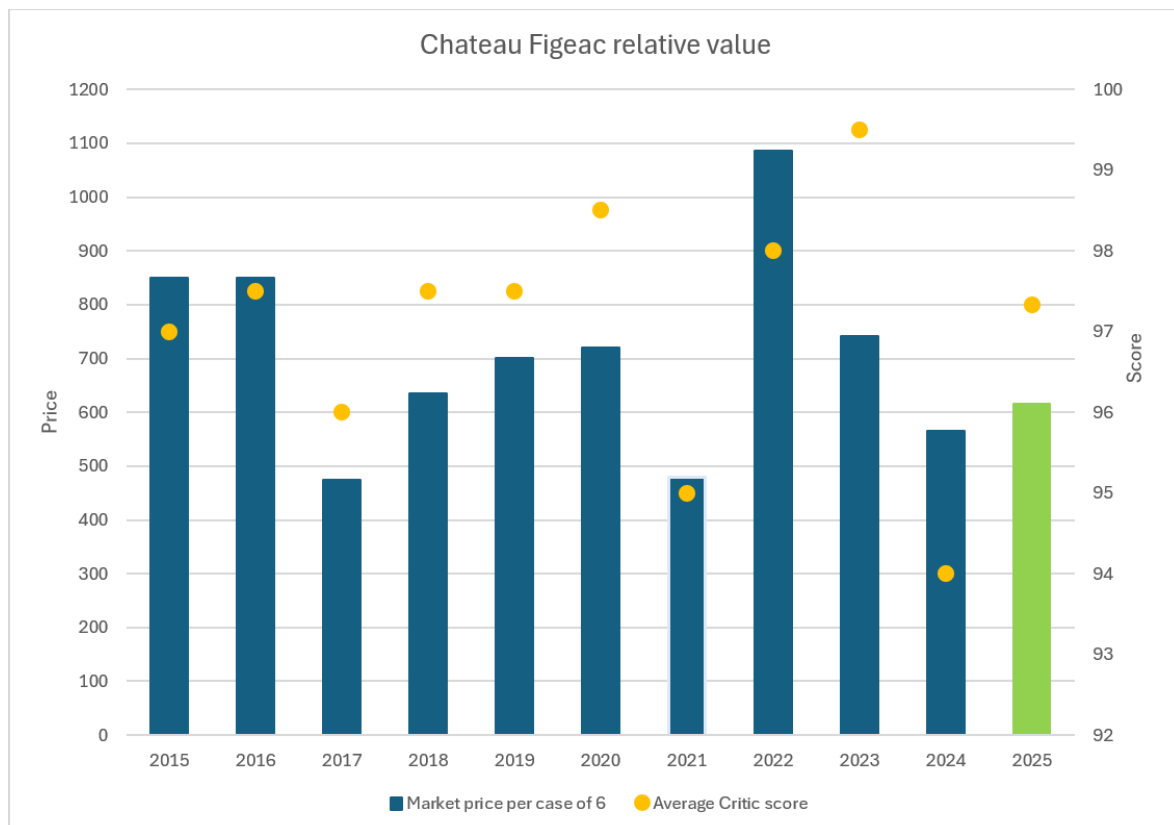
“2025 Figeac shows exceptional potential... a serious wine, built for the long haul” **William Kelley 97-99pts**

96-98pts Neal Martin Vinous *“The 2025 Figeac is medium-bodied with very fine, slightly granular tannins. Darker fruit than normal, nicely structured, linear and correct, this is a Figeac that veers towards the more elegant side in Saint-Émilion. Just a touch of bitterness on the finish neatly counterbalances the contained opulence. If it ends up at the top of my banded score, I would not be surprised. 13.1% alcohol.”*

Discounts to similar physical vintages were perfectly calculated to release this at fair value:

- 2020: -3.83%,
- 2019: -1.45%
- 2016: -13.91%
- 2022: -57.24%

Strong BUY



Chateau Leoville Las Cases

£660 per 6

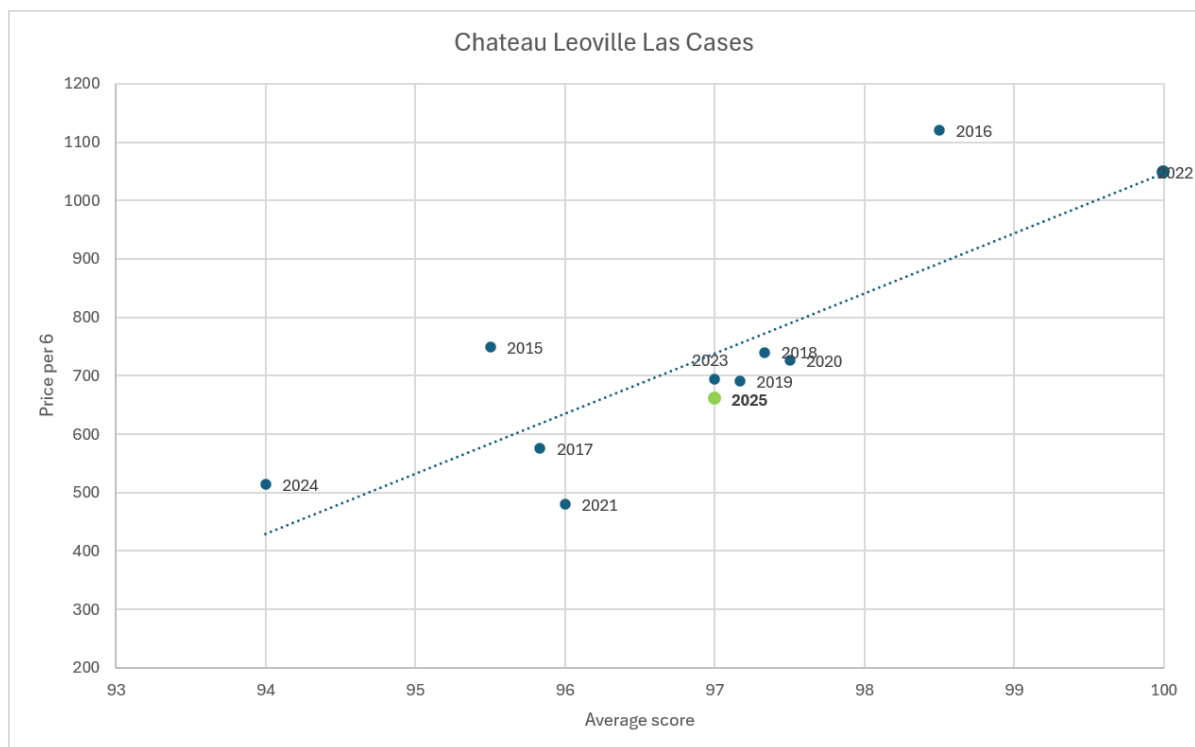
This is a Chateau with a very strong brand and pedigree rubbing shoulders with the First Growth estates in terms of quality: it is referred to as a “Super Second Growth”

The property consistently achieves high scores from critics and 2025 is no exception with a 96-98/100 consensus from the three leading wine critics.

Leoville Las Cases is a cornerstone of any serious Bordeaux collection with strong liquidity in the secondary market and constant demand.

Released at an attractive level versus previous Las Cases vintages and other properties of this calibre, this wine will be much harder to source later, especially with record low production in 2025. **Strong BUY**

96-98 pts William Kelley, Wine Advocate - *"One of the most serious, brooding wines of the vintage is the 2025 Léoville Las Cases"*



Chateau Margaux

£2,034 per 6

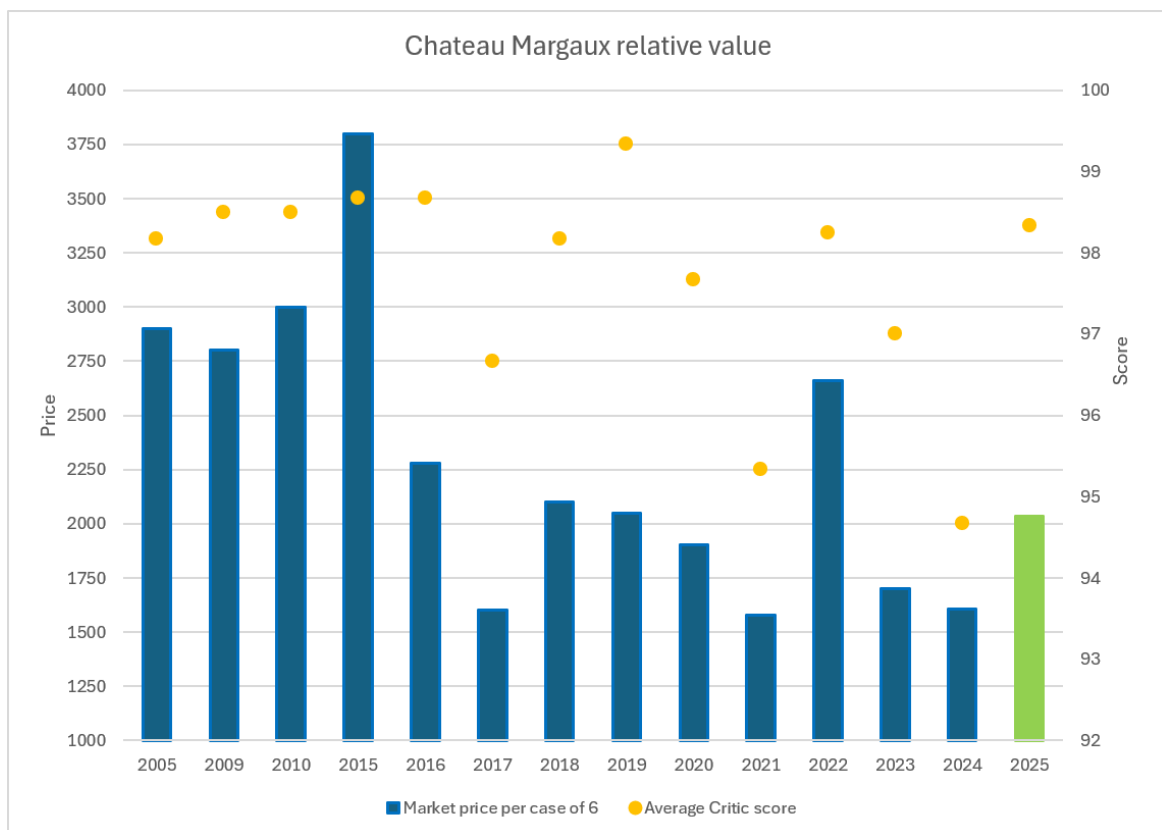
The 2025 Chateau Margaux received major acclaim from all the wine critics and is just shy of achieving a perfect score of 100 points when tasted from barrel.

We were blown away by the quality and the finesse of this vintage and there is no doubt in our mind that it will rank right up there with the 2005, 2009, 2010, 2015 and 2016, which are currently trading at much higher prices.

Priced as the cheapest Margaux with a score above 98, this is a **STRONG BUY** especially when volumes produced were tiny due to low yields and strict selection of the crop. The probability for the price to increase over next 10 years is very high.

“A heavenly, magical wine that has perfection written all over it, it reminds me of the 2009 on the palate and is a legendary Margaux in the making.” **98-100pts Jeb Dunnuck**

“The 2025 Château Margaux is shaping up to be one of the wines of this young vintage. Dark and layered, almost mysterious in bearing, the 2025 is going to have a lot to say over the coming decades as it grows up” **97-99pts Antonio Galloni,**



Vieux Chateau Certan

£810 per 6

The quality of the wines at this Pomerol estate is consistently exceptional and the property has a cult following from collectors.

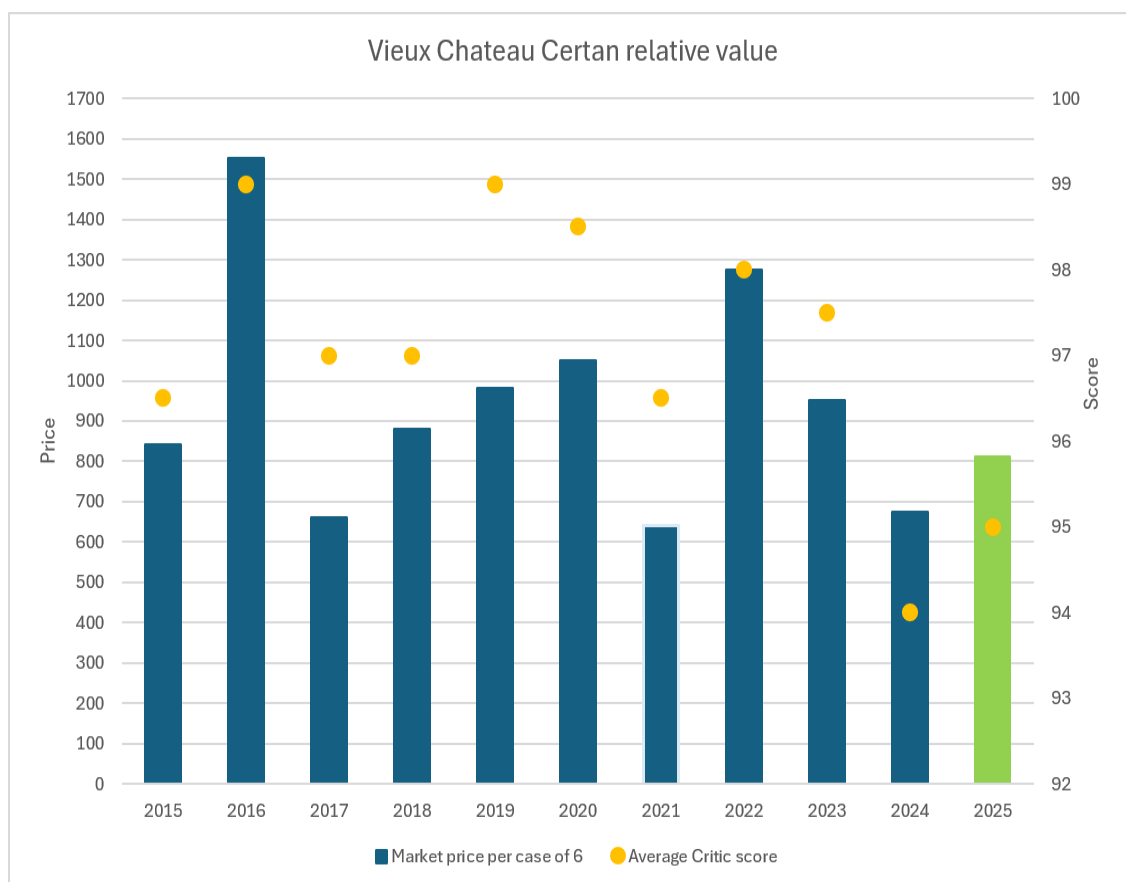
This 2025 vintage divided the leading critics and whilst Neal Martin scored it high at 95-97, the others were not so generous.

Quite structured, with chalky tannins on the finish, almost as if it came from more limestone soil. Not a crowd pleaser like the 2022, but an intellectual, vertical VCC that will flesh out in barrel. Drink 2033-2060." **95-97/100 Neal Martin, Vinous**

We thought it was a spectacular wine, and we believe it will be upgraded once bottled and age for a few years.

This is Winecube conviction and we are backing it up: we rate it as a **speculative BUY** as it is released at a sizeable discount to previous vintages available on the market and offers a very strong risk/reward profile:

- 2020: -29.63%
- 2019: -20.99%
- 2016: -81.93%
- 2022: -57.41%



Chateau Pavie Macquin**£249 per 6**

A high-quality vintage for this estate which comes well priced at just over £40 a bottle, making it the cheapest vintage of that quality. A very strong 95-97/100 score by Antonio Galloni.

Discount vs:

- 2020: -12.46%
- 2016: -14.46%
- 2022: -42.17%

This does not require any complex analysis: **Value BUY**

Chateau La Gaffeliere**£234 per 6**

A "phenomenal" wine according to wine critic Antonio Galloni who scores it a strong 97-99/100 (same as Lafite!)

Neal Martin agreed and gave it 95-97/100 –

Released at £39 a bottle.

Like Pavie Macquin, a St Emilion of this quality will no doubt command a much higher price in the future.

Value BUY

Chateau Brane Cantenac**£237 per 6**

This Second Grand Cru Classé in 1855 is one of the most sought-after names in Margaux.

It won praise by all major critics and was released at the same price as 2015 En Primeur, 10 years ago.

Special label for 100 years of ownership of the Lurton family.

"it's a brilliant success in the vintage and should be snatched up by readers." **96-98 Points Jeb Dunnuck**

A great **Value BUY**

Chateau Clinet**£270 per 6**

Highly scored by Neal Martin at 96-98 and released below £300 per 6 this is a true bargain in this vintage. It is priced as the cheapest Clinet on the market. **Strong BUY.**

"It shows just how successful the more clay-dominant soils of Pomerol were in this vintage, and it's unquestionably up with the crème de la crème of the vintage. »

96-98 Jeb Dunnuck

"This is a Clinet that I would like in my cellar. Or at the dinner table. Or in my glass." **96-98 points Neal Martin, Vinous**

Our final verdict

Bordeaux 2025 vintage release will be remembered as a test for the market: in a low production year with fantastic wine, properties which priced their release versus the reality of secondary market for their wines were successful.

The willingness to engage when quality is high remains strong: collectors just need to be savvy. We are not buying simply because a wine is well scored or because it carries a prestigious label. There must be a clear value proposition.

The quality of the wines has rarely been in doubt: En Primeur needs to be the most attractive time to allocate capital and pricing, quality and scarcity need to align.

FAQ : Bordeaux En Primeur 2025

What is Bordeaux En Primeur ?

Bordeaux En Primeur is the system through which wines are sold while still ageing in barrel, typically around two years before they are bottled and released to the market. We purchase wines based on early critic assessments and our own analysis, when we think they have long term potential for appreciation.

Is Bordeaux 2025 a good vintage?

While the growing season presented several challenges, the vintage has been praised for producing wines with freshness, structure and precision, with several leading estates receiving scores that compare favourably with highly regarded recent vintages. It is a low alcohol, low production vintage and critics have responded positively to many of the wines.

Why do we assess Bordeaux 2025 versus older vintages?

We focus on relative value and long-term potential. Rather than purchasing a wine simply because it is new we assess critic scores, pricing, drinking windows, scarcity and long-term potential against mature vintages that are already bottled and available for delivery.

Should collectors buy Bordeaux 2025 or older vintages?

The answer is both. Bordeaux 2025 En primeur offers provenance, long-term ageing potential and access to highly rated wines which may not be easily available later. However, several available vintages currently offer tremendous value and are also ready to consume at similar or lower price levels. We always assess which wines offer the best potential, making value analysis an important part of any buying decision.

Winecube collection management and stringent selection powers

***Smart passion* collecting**

Start building your collection