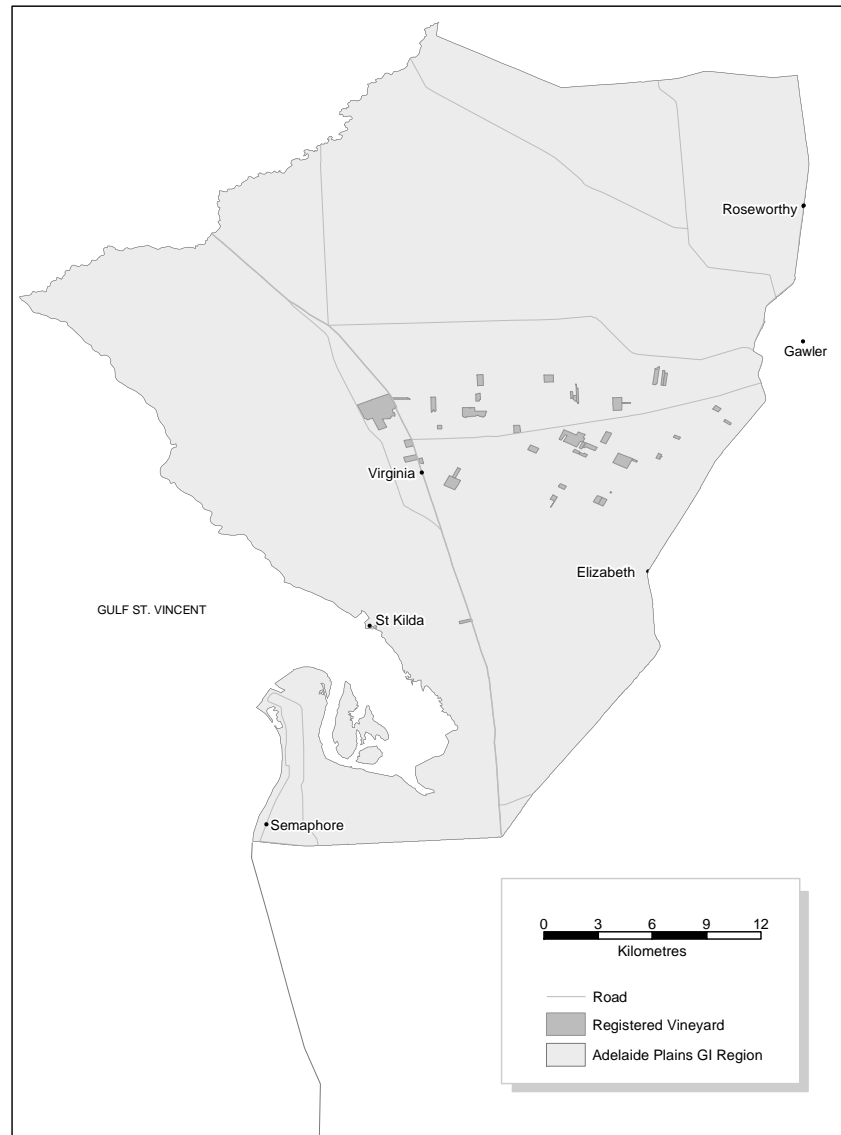


## ADELAIDE PLAINS VINTAGE OVERVIEW



### *Vintage report*

The weather was good to the Adelaide Plains region in 2003-4. After a dry winter, we were pleased to see good rains in the later part of August and early September. Cold conditions played a part in September through to October but no frost damage was reported and only slight wind damage in the Shiraz – mainly the top tips of the shoots.

The weather stayed kind to us and there was good flowering and fruit set. A dry November meant that by the end of the month, the soil was starting to really dry out.

December remained dry – with several days rocketing to the low 40°Cs – causing some early headaches for growers monitoring ripening and watering.

The Adelaide Plains region has one of the lowest incidences of pests and diseases in Australia and this season also did not present any problems, particularly with downy or powdery mildew. The dry continued into January, but much cooler. More good weather and the grapes ripened well.

Vintage 2004 arrived with an earlier than usual harvest for Chardonnay – some as early as the first days of February.

Winemakers decided on the whites coming off early with lower baumes in order to keep freshness and flavour before forecast hot weather could have a ruinous effect.

Some nights in February were very warm (damned hot) causing some problems with fruit temperature and during harvest itself. Tonnages were generally up.

Overall, quality for both whites and reds was good, with fruit coming off at a lower baume than normal due to the warm and unpredictable conditions. This helped retain flavours and kept the fruit in better than predicted condition. We are pretty happy with what we are working with – particularly the reds, with rich deep colours and full fruit flavours.

*Dr Joe Ceravolo*

*President, Adelaide Plains Wine Region Inc*

### *Overview of vintage statistics*

The reported crush for the Adelaide Plains in 2004 was 7,003 tonnes. Although this was 27% more than in 2003, there was no surplus of white varieties, and only a small surplus of reds. However, there were substantial reductions in the average purchase value of the fruit – with Shiraz and Cabernet Sauvignon down by over \$300 per tonne. The Chardonnay price only dropped by \$30 per tonne. Despite this, income to growers overall remained about the same, because of the higher tonnages.

The forecast is for intake of red varieties to decline to less than 3,000 tonnes, while whites remain at around 2,500 tonnes.

There were 40 hectares of white varieties planted in the region in 2003 – a 20% increase. Production estimates for 2009 suggest a small surplus in red varieties compared with intake requirements.

## ADELAIDE PLAINS CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 3.1

Current area in hectares by year planted

Variety	Pre-1999	1999	2000	2001	2002	2003	Total area	% planted in 2003
<b>RED WINEGRAPES</b>								
CABERNET FRANC	3	0	0	0	0	0	3	0%
CABERNET SAUVIGNON	50	4	10	1	0	0	65	0%
GRENACHE	23	0	1	4	0	0	28	0%
MALBEC	7	0	0	0	0	0	7	0%
MATARO (MOUVEDRE)	4	0	0	0	0	0	4	0%
MERLOT	25	3	9	8	0	0	45	0%
PETIT VERDOT	0	2	0	0	0	0	2	0%
PINOT NOIR	20	0	0	0	0	0	20	0%
RUBY CABERNET	4	0	2	0	0	0	6	0%
SANGIOVESE	1	0	4	1	0	0	6	0%
SHIRAZ	131	2	18	32	0	0	183	0%
OTHER RED	1	0	2	1	0	0	3	0%
<b>TOTAL RED WINEGRAPES</b>	<b>269</b>	<b>10</b>	<b>45</b>	<b>47</b>	<b>0</b>	<b>0</b>	<b>372</b>	<b>0%</b>
<b>WHITE WINEGRAPES</b>								
CHARDONNAY	56	0	6	4	2	20	89	23%
CHENIN BLANC	5	0	0	0	0	0	5	0%
COLOBARD	7	0	0	0	1	0	8	0%
MUSCAT BLANC	1	0	0	0	0	0	1	0%
MUSCAT GORDO BLANCO	3	0	0	0	0	0	3	0%
RIESLING	17	0	0	0	0	0	17	0%
SAUVIGNON BLANC	24	0	0	7	0	20	51	39%
SEMILLON	9	0	0	0	0	0	9	0%
VERDELHO	1	0	0	0	0	0	1	0%
VIIGNIER	0	0	0	16	0	0	16	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>123</b>	<b>0</b>	<b>6</b>	<b>27</b>	<b>3</b>	<b>40</b>	<b>200</b>	<b>20%</b>
<b>TOTAL ALL VARIETIES</b>	<b>393</b>	<b>10</b>	<b>52</b>	<b>74</b>	<b>3</b>	<b>40</b>	<b>572</b>	<b>7%</b>

Note: some increase in area in this region is a result of including previously unregistered growers with older plantings.



## ADELAIDE PLAINS TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 3.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for		
							Own	Other	Preferred
<b>RED</b>									
<b>Cabernet Sauvignon</b>	<b>59</b>	<b>640</b>	<b>699</b>	<b>662</b>	92%	105%	3	6	7
<b>Grenache</b>	<b>3</b>	<b>519</b>	<b>521</b>	<b>551</b>	99%	95%	1	6	7
<b>Malbec</b>	<b>0</b>	<b>62</b>	<b>62</b>	<b>25</b>	100%	247%	0	3	2
<b>Mataro (Mouvedre)</b>	<b>0</b>	<b>81</b>	<b>81</b>	<b>46</b>	100%	176%	0	2	1
<b>Merlot</b>	<b>81</b>	<b>392</b>	<b>473</b>	<b>426</b>	83%	111%	2	6	7
<b>Petit Verdot</b>	<b>0</b>	<b>18</b>	<b>18</b>	<b>15</b>	100%	122%	0	1	1
<b>Pinot Noir</b>	<b>0</b>	<b>287</b>	<b>287</b>	<b>287</b>	100%	100%	0	1	1
<b>Ruby Cabernet</b>	<b>0</b>	<b>7</b>	<b>7</b>	<b>0</b>	100%		0	1	0
<b>Sangiovese</b>	<b>0</b>	<b>59</b>	<b>59</b>	<b>15</b>	100%	391%	0	2	1
<b>Shiraz</b>	<b>141</b>	<b>2318</b>	<b>2459</b>	<b>2124</b>	94%	116%	3	9	10
<b>Zinfandel</b>	<b>0</b>	<b>30</b>	<b>30</b>	<b>30</b>	100%	100%	0	1	1
<b>Total RED</b>	<b>283</b>	<b>4412</b>	<b>4696</b>	<b>4181</b>	94%	112%			
<b>WHITE</b>									
<b>Chardonnay</b>	<b>54</b>	<b>1042</b>	<b>1095</b>	<b>1113</b>	95%	98%	2	5	7
<b>Chenin Blanc</b>	<b>0</b>	<b>108</b>	<b>108</b>	<b>108</b>	100%	100%	0	2	2
<b>Colombard</b>	<b>55</b>	<b>102</b>	<b>158</b>	<b>162</b>	65%	97%	1	2	2
<b>Muscat Gordo Blanco</b>	<b>0</b>	<b>18</b>	<b>18</b>	<b>18</b>	100%	100%	0	2	2
<b>Riesling</b>	<b>21</b>	<b>169</b>	<b>190</b>	<b>183</b>	89%	104%	1	2	3
<b>Sauvignon Blanc</b>	<b>0</b>	<b>484</b>	<b>484</b>	<b>481</b>	100%	101%	0	6	6
<b>Semillon</b>	<b>0</b>	<b>179</b>	<b>179</b>	<b>186</b>	100%	96%	0	2	2
<b>Viognier</b>	<b>0</b>	<b>76</b>	<b>76</b>	<b>76</b>	100%	100%	0	1	1
<b>Total WHITE</b>	<b>130</b>	<b>2177</b>	<b>2307</b>	<b>2327</b>	94%	99%			
<b>Total for region</b>	<b>413</b>	<b>6589</b>	<b>7003</b>	<b>6509</b>					

## ADELAIDE PLAINS CROP VALUE DATA - VINTAGE 2004

Table 3.3

estimated total value

Variety	Grower grown	Total crushed (1)	purchased grapes	total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
<b>RED</b>								
Cabernet Sauvignon	640	699	\$516,082	\$563,622	\$250	\$1,628	\$807	100%
Grenache	519	521	\$316,301	\$318,021	\$450	\$1,200	\$610	100%
Malbec	62	62	\$38,514	\$38,514	\$250	\$1,200	\$623	100%
Mataro (Mouvedre)	81	81	\$68,511	\$68,511			\$849	100%
Merlot	392	473	\$331,675	\$399,877	\$250	\$1,400	\$846	100%
Petit Verdot	18	18	\$14,640	\$14,640			\$800	100%
Pinot Noir	287	287	\$251,405	\$251,405			\$875	100%
Ruby Cabernet	7	7	\$5,131	\$5,131			\$700	100%
Sangiovese	59	59	\$62,462	\$62,462			\$1,066	100%
Shiraz	2318	2459	\$1,959,147	\$2,078,308	\$400	\$2,200	\$845	100%
Zinfandel	30	30	\$21,098	\$21,098			\$700	100%
<b>Total RED</b>	<b>4412</b>	<b>4696</b>	<b>\$3,584,966</b>	<b>\$3,821,588</b>				
<b>WHITE</b>								
Chardonnay	1042	1095	\$1,217,993	\$1,280,688	\$500	\$1,463	\$1,169	100%
Chenin Blanc	108	108	\$47,382	\$47,382			\$439	100%
Colombard	102	158	\$67,841	\$104,652			\$664	100%
Muscat Gordo Blanco	18	18	\$9,307	\$9,307			\$517	100%
Riesling	169	190	\$118,510	\$133,368			\$703	100%
Sauvignon Blanc	484	484	\$448,417	\$448,417	\$600	\$2,000	\$926	100%
Semillon	179	179	\$125,310	\$125,310			\$702	100%
Viognier	76	76	\$105,980	\$105,980			\$1,400	100%
<b>Total WHITE</b>	<b>2177</b>	<b>2307</b>	<b>\$2,140,740</b>	<b>\$2,255,105</b>				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.



## ADELAIDE PLAINS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 3.4

Variety	2005		2006		2007		2008		2009	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
<b>RED</b>										
Cabernet Sauvignon	640	457	384	281	387	284	331	228	331	228
Grenache	440	350	270	180	270	180	243	153	243	153
Malbec	75	0	60	0	60	0	60	0	60	0
Mataro (Mouvedre)	40	40	20	20	20	20	0	0	0	0
Merlot	551	484	584	524	563	503	458	398	458	398
Petit Verdot	15	15	15	15	15	15	15	15	15	15
Pinot Noir	314	314	314	314	314	314	224	224	224	224
Ruby Cabernet	5	5	5	5	5	5	5	5	5	5
Sangiovese	65	15	65	15	65	15	65	15	65	15
Shiraz	2262	1852	1690	1280	1614	1204	1332	922	1332	922
<b>Total for RED</b>	<b>4407</b>	<b>3532</b>	<b>3407</b>	<b>2634</b>	<b>3313</b>	<b>2540</b>	<b>2733</b>	<b>1960</b>	<b>2733</b>	<b>1960</b>
<b>WHITE</b>										
Chardonnay	1338	1338	1235	1235	1109	1109	1021	1021	1021	1021
Chenin Blanc	24	24	0	0	0	0	0	0	0	0
Colombard	159	162	148	150	150	150	150	150	150	150
Muscat Gordo Blanco	26	26	26	26	26	26	26	26	26	26
Riesling	177	177	177	177	177	177	137	137	137	137
Sauvignon Blanc	543	543	664	664	764	764	737	737	737	737
Semillon	150	150	50	50	50	50	50	50	50	50
Viognier	200	200	200	200	200	200	200	200	200	200
<b>Total for WHITE</b>	<b>2617</b>	<b>2620</b>	<b>2500</b>	<b>2502</b>	<b>2476</b>	<b>2476</b>	<b>2321</b>	<b>2321</b>	<b>2321</b>	<b>2321</b>
<b>Total for region</b>	<b>7024</b>	<b>6152</b>	<b>5907</b>	<b>5136</b>	<b>5789</b>	<b>5016</b>	<b>5054</b>	<b>4281</b>	<b>5054</b>	<b>4281</b>

# ADELAIDE PLAINS PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1994 - 2009

Figure 3.1

Past production and projections (major varieties)

