

Barossa Valley Wine Region

Incorporating Barossa Zone - other

Regional summary report

2008

Vintage overview

Despite below average winter and spring rainfall, good rains during budburst provided an exceptional start to the growing season that resulted in strong, early growth. Above average temperatures from August to November also meant that mostly frost-free conditions prevailed. Given the drier and hotter conditions, excellent growth continued, which advanced many of the vineyards' normal flowering dates by approximately two weeks. The dry start also meant that supplementary irrigation began earlier and by the middle of December most of the canopies had completed their development with good balance, even on the deeper soils.

There were no significant rain interruptions to vintage in the Barossa Valley with disease pressure for the entire season being extremely low. In early March there was a prolonged heat wave over a two week period that consistently pushed daily temperatures above 35°C. Careful management of irrigation and subsequent soil moisture through this period was an important factor in maintaining both yield and quality.

Vintage commenced about three weeks earlier than normal, with the lower yielding blocks of Sauvignon Blanc first off the ranks in the third week of January. Many of the older premium red blocks were picked and in tank by late February. The unusually cool nights through this month provided for ideal ripening and harvesting conditions with most vineyards remaining in great shape despite the very dry conditions that they had been exposed to in the previous months.

Overall wine quality for the 2008 vintage is regarded as excellent. Despite the March heat wave and the attention it attracted, 2008 was a slightly cooler vintage due to the earlier ripening and the unusually mild February weather. These conditions encouraged excellent colour, flavour and tannin development with varieties such as Shiraz showing great flavour vibrancy and richness. The 2008 season and vintage period also showed how well many growers adapted in an environment of extremes with the effective management of water even more critical throughout this period.

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Phylloxera and Grape Industry Board and Central Regional Committee*

Overview of vintage statistics

The harvest from the Barossa Valley (including Barossa zone – other) was 66,816 tonnes in 2008, a substantial recovery after the very low 2007 harvest of under 40,000 tonnes. The total value of grapes from the region more than doubled - from \$45 million in 2007 to \$91 million, and average purchase values showed a further increase despite the much higher tonnages. Shiraz increased by \$200 per tonne and Cabernet Sauvignon by \$300 per tonne, while even Chardonnay showed an increase in average purchase value against the trend in most regions.

New plantings in the Barossa Valley in 2007 (including top-working and replacements) were 292 hectares – almost all Shiraz. This is 3% of the total area, well above the state average of 1% new planting and much higher than in 2006, when only 50 hectares were planted.

The estimated production from the Barossa Valley for 2009 is around 87,000 tonnes – assuming a return to full potential. This would be equal to the region's highest recorded crush (in 2004). The wineries' committed intake is 75,000 tonnes, leaving only 12,000 tonnes (14%) uncontracted. The early indications of the season are that this production is unlikely to be achieved; therefore there will almost certainly be very little available fruit next vintage.

In 2013, the estimated production is expected to remain at around the same level (88,000 tonnes), of which 57% (50,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 28,000 tonnes to be sold on the open market or signed up in the intervening period. However, across the state, even if growing conditions return to "normal", there is expected to be little or no overall surplus compared with demand in 2013 (see State Summary section).

NB The Barossa Valley regional summary includes the Barossa zone – other (106 hectares).

Barossa Valley

Winegrape intake summary - vintage 2008

Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
Red winegrapes								
Cabernet Franc	102	\$600	\$1,500	\$119,984	\$1,174	57	160	\$187,469
Cabernet Sauvignon	5,844	\$600	\$5,730	\$7,769,651	\$1,329	1,681	7,526	\$10,004,891
Grenache	3,096	\$100	\$8,000	\$3,998,109	\$1,291	736	3,833	\$4,948,862
Malbec	71	\$800	\$1,400	\$72,009	\$1,021	51	122	\$124,413
Mataro	554	\$750	\$8,000	\$916,110	\$1,652	290	844	\$1,394,501
Merlot	2,617	\$250	\$1,800	\$2,624,331	\$1,003	513	3,129	\$3,138,833
Nebbiolo	18			\$17,559	\$958	38	56	\$53,789
Petit Verdot	142	\$800	\$1,200	\$143,719	\$1,015	20	161	\$163,834
Pinot Noir	382	\$600	\$1,550	\$333,286	\$872	114	496	\$432,391
Sangiovese	206	\$700	\$2,500	\$247,676	\$1,203	15	221	\$265,639
Shiraz	25,586	\$250	\$10,000	\$44,421,833	\$1,736	5,106	30,692	\$53,286,399
Tempranillo	238	\$1,500	\$2,000	\$427,528	\$1,795	12	251	\$449,772
Touriga	38	\$1,200	\$1,700	\$60,068	\$1,572	15	53	\$83,419
Zinfandel	39	\$1,000	\$2,200	\$63,196	\$1,603	16	55	\$88,670
Other red	237	\$750	\$3,000	250,782	\$1,057	44	281	299,047
Total red winegrapes	39,172			\$61,465,841		8,708	47,880	\$74,921,928

¹ Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.

² The estimated non-response rate for the Barossa Valley is 6%.

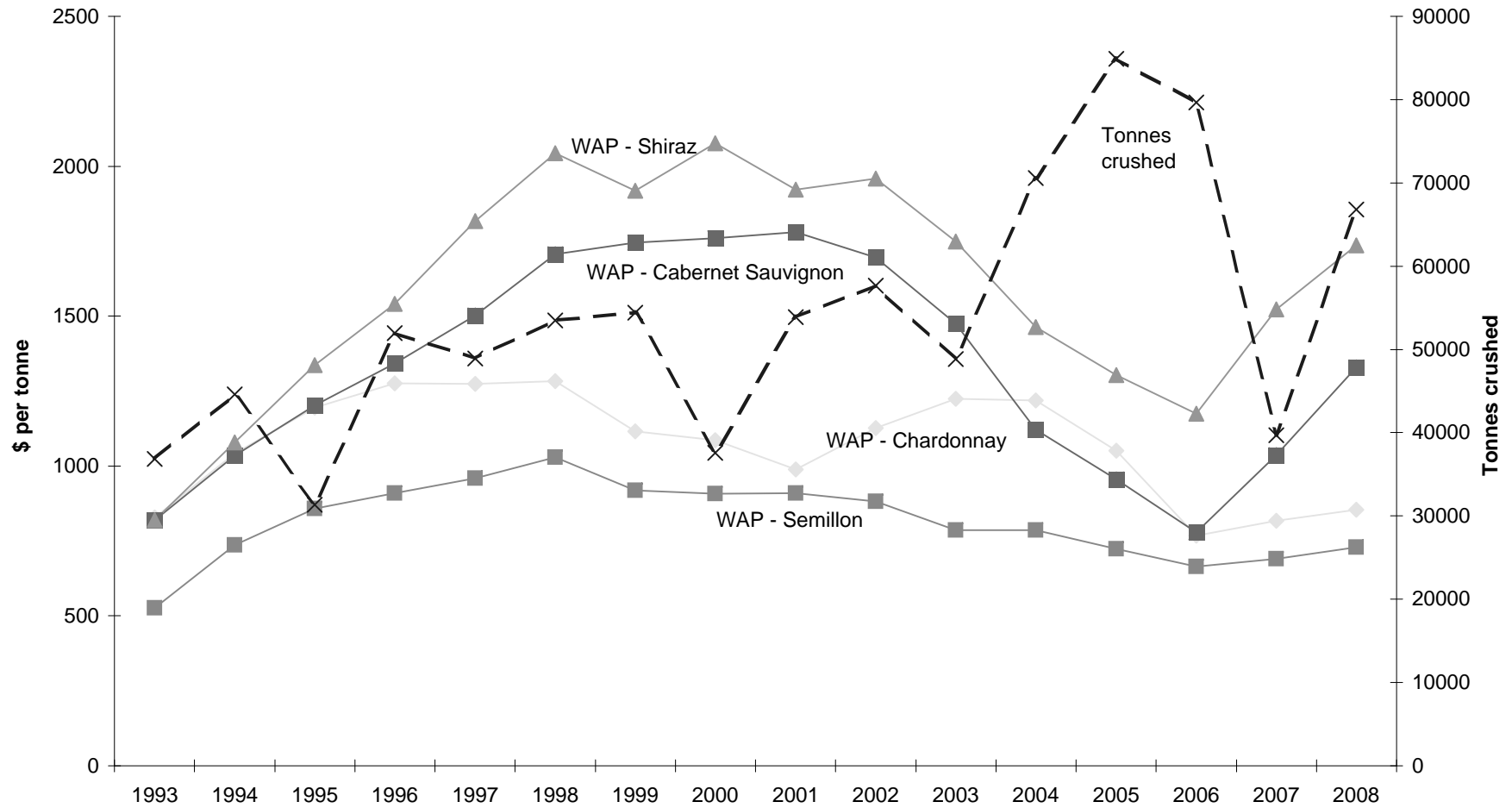
Barossa Valley

Winegrape intake summary - vintage 2008

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White winegrapes								
Semillon	6,287	\$250	\$1,900	\$4,584,165	\$729	555	6,842	\$4,988,811
Chardonnay	4,174	\$250	\$1,200	\$3,565,730	\$854	1,083	5,257	\$4,491,044
Riesling	2,618	\$250	\$3,000	\$2,170,065	\$829	1,275	3,892	\$3,226,704
Sauvignon Blanc	1,087	\$800	\$2,200	\$1,313,985	\$1,209	189	1,276	\$1,542,316
Viognier	415	\$600	\$2,250	\$576,414	\$1,387	84	500	\$693,629
Chenin Blanc	302	\$500	\$1,000	\$200,218	\$663	17	319	\$211,527
Muscat a Petit Grains Blanc	220	\$650	\$1,200	\$178,729	\$812	55	275	\$223,562
Muscat Gordo Blanco	113	\$900	\$1,300	\$116,748	\$1,036	0	113	\$116,748
Colombard	61			\$33,184	\$547	0	61	\$33,184
Muscadelle	28	\$250	\$950	\$15,220	\$540	31	59	\$32,137
Traminer	58			\$45,360	\$788	0	58	\$45,360
Verdelho	41			\$36,936	\$901	0	41	\$36,936
Marsanne	7			\$13,150	\$2,002	26	32	\$64,529
Pinot Gris	23	\$1,000	\$1,400	\$25,016	\$1,087	2	25	\$27,625
Roussanne	11			\$13,138	\$1,200	7	18	\$21,015
Other White	34			26,933	\$801	134	167	113,344
Total white winegrapes	15,478			\$12,914,991		3,458	18,936	\$15,868,470
Total all winegrapes²	54,649			\$74,380,832		12,166	66,816	\$90,790,398

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Barossa Valley

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2007
	Pre-2005	2005	2006	2007		
Red winegrape						
Alicante Bouschet	9	2	0	0	11	0%
Cabernet Franc	34	0	0	0	34	0%
Cabernet Sauvignon	1424	14	18	17	1474	1%
Durif	7	4	0	4	15	29%
Grenache	675	19	2	0	697	0%
Malbec	20	0	0	0	21	2%
Mataro (Mourvedre)	173	6	4	7	190	4%
Merlot	410	8	0	3	421	1%
Nebbiolo	8	0	0	2	10	16%
Other red	20	5	3	3	31	11%
Petit Verdot	31	1	0	0	32	0%
Pinot Noir	59	0	0	1	60	2%
Sangiovese	20	0	0	0	20	0%
Shiraz	5173	209	179	228	5789	4%
Tempranillo	37	3	4	3	47	7%
Touriga	13	0	0	0	13	0%
Zinfandel	12	1	0	1	14	6%
Total red winegrapes	8125	271	210	270	8877	3%
White winegrapes						
Albarino	1	0	1	9	11	82%
Chardonnay	668	17	1	1	687	0%
Chenin Blanc	33	0	0	0	33	0%
Muscadelle (Tokay)	26	0	0	0	26	0%
Muscat Blanc (Frontignac)	44	0	0	0	45	0%
Other white	35	4	6	1	46	2%
Palomino	14	0	0	0	14	0%
Pedro Ximenes	14	0	0	0	14	1%
Riesling	388	50	1	0	439	0%
Sauvignon Blanc	101	4	8	5	118	4%
Semillon	659	0	1	0	660	0%
Viognier	53	19	4	6	82	8%
Total white winegrapes	2035	95	22	22	2175	1%
Unknown variety	46	0	0	0	46	0%
Total all varieties	10101	367	233	292	10992	3%

* Includes plantings in Barossa Zone - other (106 hectares)

Barossa Valley

Estimated supply and committed intake 2009 - 2013

Variety	2009				2011				2013			
	Est Supply ¹	Total committed intake ²		Available supply ³	Est Supply ¹	Total committed intake ²		Available supply ³	Est Supply ¹	Total committed intake ²		Available supply ³
		Winery grapes	Contract purchases			Winery grapes	Contract purchases			Winery grapes	Contract purchases	
Red winegrapes												
Cabernet Franc	363	54	137	172	299	54	137	109	299	54	108	137
Cabernet Sauvignon	9,979	2,330	6,530	1,120	9,206	2,343	5,593	1,269	9,239	2,320	5,014	1,905
Grenache	4,987	1,110	3,949	0	4,696	1,222	3,441	33	4,796	1,293	2,790	713
Malbec	85	67	90	0	113	70	90	0	113	70	75	0
Mataro	991	456	621	0	1,012	512	618	0	1,093	515	462	116
Merlot	3,926	662	3,194	70	3,692	711	2,609	371	3,699	724	1,953	1,021
Nebbiolo	36	28	17	0	42	38	17	0	42	38	0	3
Other red	464	55	265	145	589	57	265	268	659	58	265	337
Petit Verdot	199	31	183	0	191	30	183	0	202	30	136	36
Pinot Noir	643	112	314	218	670	112	317	241	691	154	151	387
Sangiovese	176	20	197	0	169	35	197	0	169	35	161	0
Shiraz	39,974	6,912	26,552	6,511	36,549	7,100	22,459	6,990	39,596	7,271	19,048	13,277
Tempranillo	149	22	268	0	164	33	305	0	199	33	309	0
Touriga	85	17	40	27	108	41	40	27	108	41	35	32
Zinfandel	113	15	52	45	95	22	19	55	113	24	20	69
Total red winegrapes	62,169	11,891	42,408	7,870	57,595	12,380	36,291	8,924	61,016	12,660	30,526	17,831
White winegrapes												
Chardonnay	8,460	1,385	4,686	2,389	8,100	1,475	4,286	2,339	8,238	1,502	3,023	3,713
Chenin Blanc	280	21	226	33	310	21	213	76	315	21	213	81
Muscadelle	141	32	40	69	142	33	51	58	142	33	30	80
Muscat a Petit Grains Blanc	444	84	259	102	391	85	291	16	401	138	284	0
Other White	279	121	199	133	298	131	201	114	320	138	233	103
Palomino	126	102	14	10	102	102	14	0	102	102	0	0
Pinot Gris	81	8	59	13	352	8	96	247	814	8	69	737
Riesling	5,055	1,466	2,674	914	5,347	1,552	1,571	2,223	5,452	1,552	1,252	2,647
Sauvignon Blanc	1,513	261	1,791	0	1,784	261	1,919	0	2,064	261	1,909	0
Semillon	8,030	763	6,220	1,046	7,702	755	5,408	1,539	7,734	755	4,406	2,573
Traminer	122	0	0	122	129	0	0	129	129	0	0	129
Verdelho	50	0	61	0	46	0	19	27	46	0	19	27
Viognier	741	93	557	91	834	106	640	88	918	106	617	195
Total white winegrapes	25,322	4,336	16,786	4,199	25,536	4,530	14,710	6,296	26,675	4,616	12,055	10,004
Total all winegrapes	87,491	16,228	59,194	12,069	83,131	16,910	51,001	15,220	87,691	17,276	42,581	27,835

¹ Supply forecast produced by ABARE based on the ABS Vineyard Survey 2007

² A raising factor of 1.06 has been applied to committed intake to allow for non-respondents

³ Where total committed intake is greater than estimated supply, the available supply is recorded as zero.