

## COONAWARRA VINTAGE OVERVIEW



### *Vintage Report*

An ideal growing season leading into the 2004 vintage, combined with the maturation of new plantings, has resulted in a record vintage for the Coonawarra wine region.

The winter and spring conditions of 2003 were considered average in terms of temperature and rainfall, although budburst occurred slightly later than normal. Warmer weather in late spring and early summer produced ideal flowering conditions. The excellent flowering period achieved almost 100% fruit set, and all indications pointed to above average crop levels in all varieties.

Very cool and dry conditions during January accounted for the delay in veraison. The slow ripening conditions meant the start of vintage was approximately two weeks later than normal, in mid March.

Two rain episodes in March caused minor disruption to harvest, but also boosted soil moisture after a particularly dry summer and early autumn. Wind and sun immediately following both rainfalls ensured rapid drying of the vines and minimised any disease pressure. There were a number of isolated outbreaks of botrytis in some thinner-skinned varieties reported; however the vast majority of fruit was clean and disease free.

Post vintage assessments have been encouraging, with early reports identifying rich, ripe fruit flavours and good structure in the red wines, and attractive fruit and acid balance in the white wines. The region's winemakers are particularly pleased with the quality of Cabernet Sauvignon and Merlot wines, and there is widespread satisfaction with white wines, in particular Riesling and Chardonnay.

*Bruce Redman*

*President, Coonawarra Vignerons Association*

### *Overview of vintage statistics*

Coonawarra produced 62,651 tonnes in 2004 – nearly three times the 2003 harvest, and almost 10,000 tonnes more than the previous record harvest of 53,125 tonnes in 2001. This was in spite of widespread crop thinning. There was a 33% surplus of red varieties, and a 20% surplus of whites.

The record tonnages produced big falls in the average purchase value of most varieties: Cabernet Sauvignon (down \$700), Merlot (down \$850) and Shiraz (down \$1000 per tonne) were the hardest hit. The average purchase value of the white varieties held up reasonably well. On the other hand, the total income to the region's growers almost doubled because of the increased tonnages, and the total estimated value of grapes from the region increased from \$41 million in 2003 to \$69 million.

The forecast is for intake of red varieties to be around 37,000 tonnes (compared with 55,000 tonnes this vintage) and whites to be around 5,500 tonnes (compared with 8,000 tonnes this vintage). Cabernet Sauvignon remains by far the most important variety for the region, accounting for nearly 50% of the total forecast intake. Despite the lack of forecast growth in intake, there were nearly 80 hectares of Cabernet Sauvignon and Shiraz planted in the region in 2003. Based on the current vineyard area, and using yield estimates of 9 t/ha for reds and 10 t/ha for whites, the estimated production from Coonawarra in 2009 is 50,000 tonnes. This means an approximate surplus of 7,000 tonnes of red varieties and 1,600 tonnes of whites compared with the 2009 preferred intake figures. While demand forecasts do change from year to year, this discrepancy may foreshadow some difficulties for growers without contracts in the future.

## COONAWARRA CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 6.1

### 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	41	0	0	0	0	0	41	0%
CABERNET SAUVIGNON	2555	311	113	65	55	51	3150	2%
MALBEC	18	0	0	0	0	0	18	0%
MERLOT	258	63	48	51	4	2	425	0%
NEBBIOLO	0	0	0	0	0	0	0	0%
PETIT VERDOT	6	14	0	3	1	0	25	0%
PINOT NOIR	42	5	0	0	0	0	47	0%
SANGIOVESE	0	0	0	0	0	0	0	0%
SHIRAZ	825	83	43	32	69	26	1079	2%
TEMPRANILLO	0	0	0	0	0	0	0	0%
OTHER RED	3	0	0	0	2	0	5	0%
<b>TOTAL RED WINEGRAPES</b>	<b>3750</b>	<b>476</b>	<b>204</b>	<b>151</b>	<b>131</b>	<b>79</b>	<b>4791</b>	<b>2%</b>
<b>WHITE WINEGRAPES</b>								
CHARDONNAY	350	9	0	12	27	0	398	0%
RIESLING	181	5	0	0	11	2	199	1%
SAUVIGNON BLANC	63	9	0	3	0	3	79	4%
SEMILLON	4	0	0	0	0	0	4	0%
TRAMINER	2	0	0	0	0	0	2	0%
VIOGNIER	0	1	0	0	0	2	3	62%
OTHER WHITE	2	0	0	0	0	0	2	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>602</b>	<b>25</b>	<b>0</b>	<b>16</b>	<b>38</b>	<b>7</b>	<b>687</b>	<b>1%</b>
<b>TOTAL ALL VARIETIES</b>	<b>4352</b>	<b>500</b>	<b>204</b>	<b>167</b>	<b>169</b>	<b>86</b>	<b>5477</b>	<b>2%</b>



## COONAWARRA TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 6.2

Variety	Total winery	Total other	Total crushed	Total preferred	Tonnes from other	% of demand	Number of wineries reporting tonnages (> 0) for		
	grown	growers			growers as % of total	supplied	Own	Other	Preferred
<b>RED</b>									
<b>Cabernet Franc</b>	<b>559</b>	<b>221</b>	<b>780</b>	<b>414</b>	28%	188%	12	5	13
<b>Cabernet Sauvignon</b>	<b>17320</b>	<b>18755</b>	<b>36076</b>	<b>25488</b>	52%	142%	20	25	36
<b>Malbec</b>	<b>112</b>	<b>0</b>	<b>112</b>	<b>84</b>	0%	133%	4	0	4
<b>Merlot</b>	<b>1998</b>	<b>2180</b>	<b>4178</b>	<b>3110</b>	52%	134%	16	13	24
<b>Meunier</b>	<b>23</b>	<b>5</b>	<b>28</b>	<b>26</b>	18%	107%	2	1	3
<b>Petit Verdot</b>	<b>18</b>	<b>182</b>	<b>200</b>	<b>157</b>	91%	128%	5	3	7
<b>Pinot Noir</b>	<b>294</b>	<b>704</b>	<b>998</b>	<b>611</b>	71%	163%	5	6	9
<b>Ruby Cabernet</b>	<b>7</b>	<b>0</b>	<b>7</b>	<b>0</b>	0%		1	0	0
<b>Shiraz</b>	<b>7278</b>	<b>4840</b>	<b>12118</b>	<b>11198</b>	40%	108%	20	11	27
<b>Total RED</b>	<b>27610</b>	<b>26888</b>	<b>54498</b>	<b>41088</b>	49%	133%			
<b>WHITE</b>									
<b>Chardonnay</b>	<b>3251</b>	<b>2232</b>	<b>5483</b>	<b>4242</b>	41%	129%	10	13	19
<b>Other white</b>	<b>11</b>	<b>0</b>	<b>11</b>	<b>0</b>	0%		1	0	0
<b>Pedro Ximenes</b>	<b>21</b>	<b>0</b>	<b>21</b>	<b>21</b>	0%	100%	1	0	1
<b>Riesling</b>	<b>1259</b>	<b>231</b>	<b>1490</b>	<b>1430</b>	16%	104%	6	4	9
<b>Sauvignon Blanc</b>	<b>494</b>	<b>527</b>	<b>1020</b>	<b>929</b>	52%	110%	6	6	11
<b>Semillon</b>	<b>35</b>	<b>37</b>	<b>72</b>	<b>49</b>	51%	146%	2	2	4
<b>Traminer</b>	<b>50</b>	<b>0</b>	<b>50</b>	<b>50</b>	0%	100%	1	0	1
<b>Viognier</b>	<b>0</b>	<b>6</b>	<b>6</b>	<b>15</b>	100%	40%	0	1	1
<b>Total WHITE</b>	<b>5120</b>	<b>3033</b>	<b>8153</b>	<b>6735</b>	37%	121%			
<b>Total for region</b>	<b>32730</b>	<b>29920</b>	<b>62651</b>	<b>47824</b>					

## COONAWARRA CROP VALUE DATA - VINTAGE 2004

Table 6.3

Variety	Grower grown	Total crushed (1)	estimated total value		lowest	highest	calc average purchase	
			purchased grapes	total grapes	price (2)	price (2)	value per tonne (3)	
<b>RED</b>								
Cabernet Franc	221	780	\$189,032	\$666,360	\$465	\$1,534	\$854	100%
Cabernet Sauvignon	18755	36076	\$21,500,273	\$41,355,629	\$190	\$2,500	\$1,146	100%
Merlot	2180	4178	\$2,075,343	\$3,978,003	\$300	\$2,280	\$952	100%
Meunier	5	28	\$6,359	\$34,825			\$1,228	100%
Petit Verdot	182	200	\$233,254	\$256,686	\$500	\$1,529	\$1,280	100%
Pinot Noir	704	998	\$614,254	\$870,999	\$400	\$1,300	\$873	100%
Shiraz	4840	12118	\$4,305,892	\$10,780,736	\$200	\$1,941	\$890	100%
<b>Total RED</b>	<b>26888</b>	<b>54379</b>	<b>\$28,924,407</b>	<b>\$57,943,237</b>				
<b>WHITE</b>								
Chardonnay	2232	5483	\$3,229,168	\$7,932,704	\$850	\$1,800	\$1,447	100%
Riesling	231	1490	\$231,067	\$1,488,972	\$850	\$1,300	\$999	96%
Sauvignon Blanc	527	1020	\$678,464	\$1,314,362	\$900	\$1,500	\$1,288	100%
Semillon	37	72	\$21,948	\$43,044			\$600	100%
Viognier	6	6	\$10,800	\$10,800			\$1,800	100%
<b>Total WHITE</b>	<b>3033</b>	<b>8071</b>	<b>\$4,171,447</b>	<b>\$10,789,882</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.



## COONAWARRA ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 6.4

Variety	2005		2006		2007		2008		2009	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
<b>RED</b>										
Cabernet Franc	444	403	420	393	420	393	420	393	420	393
Cabernet Sauvignon	23335	18665	23484	19260	22842	20368	22463	19970	22430	19970
Malbec	145	108	141	104	141	104	141	104	141	104
Merlot	2381	2110	2979	2791	3039	2899	3261	3133	3291	3183
Meunier	16	16	16	16	11	11	11	11	11	11
Petit Verdot	151	153	159	156	165	162	168	165	168	165
Pinot Noir	621	498	621	498	585	462	585	462	585	462
Ruby Cabernet	8	8	8	8	8	8	8	8	8	8
Shiraz	7776	7169	9212	8713	9705	9253	10102	9647	10142	9707
Tempranillo	2	0	2	0	2	0	2	0	2	0
<b>Total for RED</b>	<b>34879</b>	<b>29129</b>	<b>37041</b>	<b>31938</b>	<b>36917</b>	<b>33659</b>	<b>37160</b>	<b>33892</b>	<b>37197</b>	<b>34002</b>
<b>WHITE</b>										
Chardonnay	3641	3497	3499	3330	3609	3487	3622	3475	3637	3475
Other white	11	0	11	0	11	0	11	0	11	0
Pedro Ximenes	15	15	15	15	15	15	15	15	15	15
Riesling	1214	1254	1217	1257	1386	1362	1250	1203	1271	1208
Sauvignon Blanc	632	632	648	648	623	623	523	523	523	523
Semillon	31	31	31	31	21	21	21	21	21	21
Traminer	36	36	36	36	36	36	36	36	36	36
Viognier	15	15	15	15	17	17	20	20	20	20
<b>Total for WHITE</b>	<b>5595</b>	<b>5480</b>	<b>5472</b>	<b>5332</b>	<b>5718</b>	<b>5561</b>	<b>5498</b>	<b>5293</b>	<b>5534</b>	<b>5298</b>
<b>Total for region</b>	<b>40474</b>	<b>34609</b>	<b>42513</b>	<b>37270</b>	<b>42635</b>	<b>39220</b>	<b>42658</b>	<b>39185</b>	<b>42731</b>	<b>39300</b>

# COONAWARRA PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1996 - 2009

Figure 6.1

Past production and projections (major varieties)

