

Coonawarra Wine Region

Regional summary report

2008

Vintage report

Excellent seasonal growing conditions and a dry summer saw an early start to vintage in 2008, with vines showing little effect from the previous year's frost.

Despite a dry winter, early spring rains resulted in excellent budburst and enhanced vine health and fruit development.

The dry conditions throughout the growing season resulted in low disease pressure.

White varieties benefited greatly from the cool February temperatures, developing intense fruit characters and displaying good varietal definition, with the majority of whites harvested prior to the hot conditions in March.

The extreme March heat hastened fruit maturity across all red varieties with flavour, baumé and colour accumulating rapidly, compressing vintage and causing some logistical challenges.

Most reds were picked between late March and early April, producing intense wines with great colour, rich ripe flavour and fine tannins.

Yields were slightly below average for Cabernet Sauvignon with the wines showing excellent colour, good varietal distinction and ripeness. Shiraz yields were close to average and also show good ripe flavours with liquorice and spice.

Despite some challenges, current indications are that we can expect many exciting wines from the 2008 vintage.

Coonawarra Grapegrowers' Association

Overview of vintage statistics

The harvest from Coonawarra was 40,552 tonnes in 2008, more than double the frost-affected 2007 vintage. The total value of grapes from the region was \$53.5 million, compared with \$22 million in 2007. The average purchase value for Cabernet Sauvignon remained at the 2007 level (around \$1450 per tonne), while Shiraz increased by over \$100 per tonne. Although there were big increases in calculated average purchase values due to the small vintage in 2007, and these have been maintained in 2008, average prices for the major varieties in this region are still lower than they were in 1994.

New plantings in Coonawarra in spring 2007 (including top-working and replacements) were negligible for the third year in a row. However, there is no indication of any significant removal of grapevines being undertaken.

The estimated production from the Coonawarra region for 2009 is 49,000 tonnes – assuming average yields. The wineries' committed intake is around 43,000 tonnes, leaving 6,000 tonnes of uncommitted fruit. In 2013 the estimated production is slightly reduced – to 43,000 tonnes – as a result of an expected small decline in bearing area. However, it is very difficult to estimate production in Coonawarra, where the 1994 harvest was over 50,000 tonnes.

75% (33,000 tonnes) of the estimated supply in 2013 is already under contract or winery grown fruit. This leaves around 10,000 tonnes (25%) available on the open market. 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).

Coonawarra

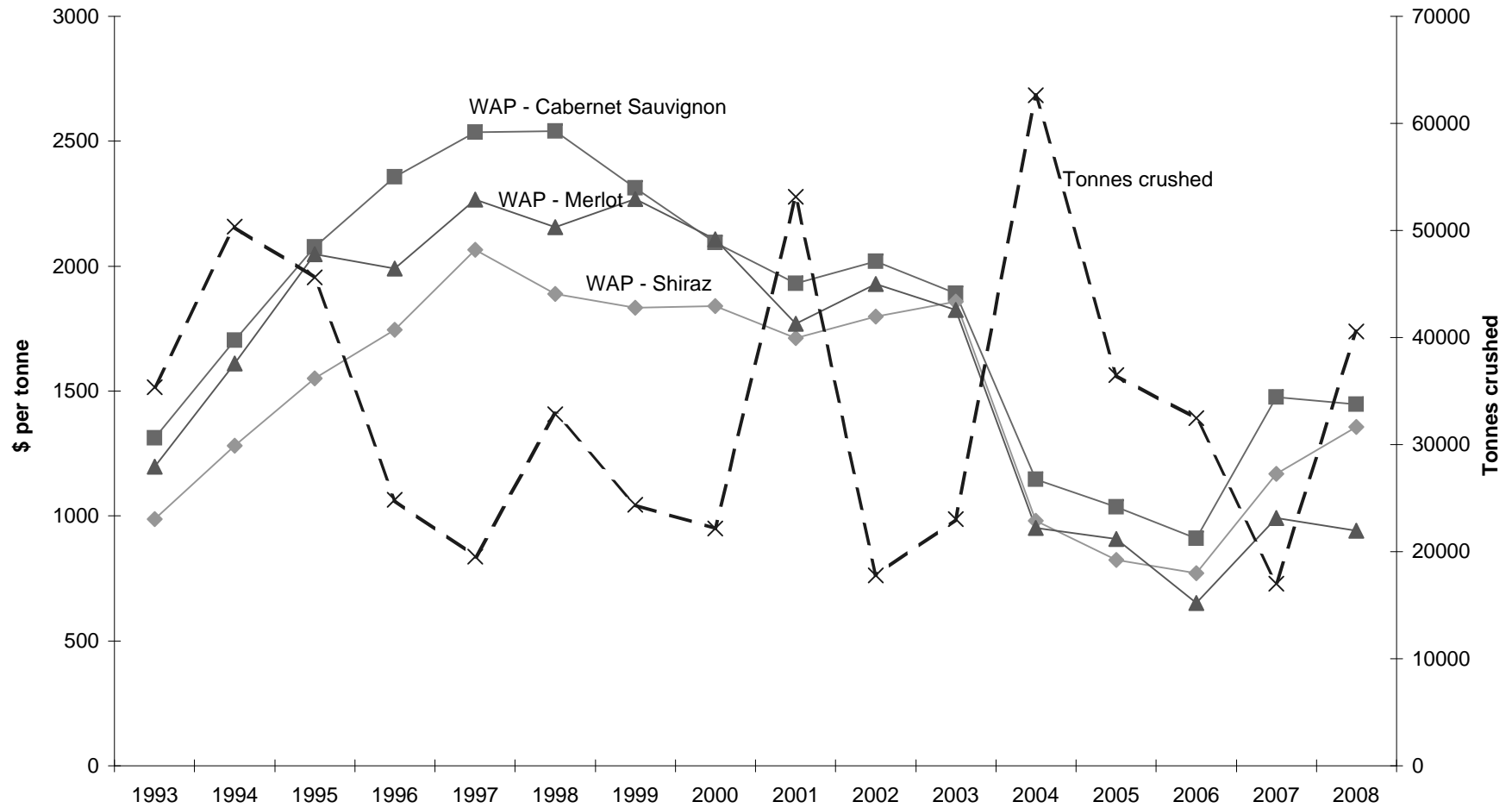
Winegrape intake summary - vintage 2008

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								
Barbera	0					2	2	\$2,746
Cabernet Franc	105	\$600	\$800	\$79,704	\$761	222	326	\$248,405
Cabernet Sauvignon	10,599	\$100	\$3,600	\$15,330,083	\$1,446	10,311	20,909	\$30,243,341
Malbec	13			\$10,368	\$800	89	101	\$81,184
Merlot	1,411	\$250	\$2,322	\$1,328,829	\$942	1,170	2,581	\$2,431,201
Meunier	1			\$1,160	\$1,000	33	34	\$34,460
Other Red	2			\$1,440	\$750	0	2	\$1,440
Petit Verdot	56			\$56,993	\$1,024	51	107	\$109,626
Pinot Noir	158	\$550	\$1,500	\$204,986	\$1,297	227	385	\$499,649
Shiraz	3,689	\$250	\$5,000	\$5,002,743	\$1,356	6,688	10,377	\$14,072,324
Tempranillo	0					4	4	\$4,806
Total red winegrapes	16,033			\$22,016,306		18,796	34,829	\$47,729,182
White winegrapes								
Chardonnay	1,400	\$250	\$1,500	\$1,348,918	\$963	2,555	3,955	\$3,810,376
Pedro Ximenes	0					6	6	\$5,832
Riesling	42			\$40,668	\$974	981	1,023	\$996,502
Sauvignon Blanc	265	\$800	\$2,000	\$358,495	\$1,354	411	676	\$915,486
Semillon	5			\$3,626	\$700	41	46	\$32,109
Traminer	0					17	17	\$17,394
Total white winegrapes	1,712			\$1,751,707		4,011	5,723	\$5,777,700
Total all winegrapes²	17,745			\$23,768,012		22,807	40,552	\$53,506,882

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 Coonawarra is 2%.

Historical Weighted Average Price vs tonnes crushed



Coonawarra

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2007
	Pre-2005	2005	2006	2007		
Red winegrapes						
Cabernet Franc	35	0	0	1	35	2%
Cabernet Sauvignon	3422	2	0	6	3430	0%
Malbec	16	0	0	0	16	0%
Merlot	418	1	0	0	419	0%
Other red	7	0	0	0	7	0%
Petit Verdot	22	0	0	0	22	0%
Pinot Noir	48	0	2	0	50	0%
Shiraz	1212	2	0	0	1214	0%
Total red winegrapes	5179	5	2	7	5193	0%
White winegrapes						
Chardonnay	419	0	0	0	419	0%
Other white	3	0	1	0	4	0%
Riesling	149	0	0	0	149	0%
Sauvignon Blanc	84	4	5	15	108	14%
Semillon	4	0	0	6	10	62%
Viognier	8	0	0	0	8	0%
Total white winegrapes	667	4	6	21	698	3%
Unknown variety	1	0	0	0	1	0%
Total all varieties	5847	9	8	28	5891	0%

Coonawarra

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												
Barbera	2	2	0	0	9	2	0	7	9	2	0	7
Cabernet Franc	369	257	120	0	403	258	28	118	403	260	0	143
Cabernet Sauvignon	27,869	13,217	10,220	4,431	20,858	13,171	6,981	706	20,891	12,773	5,022	3,096
Malbec	127	92	0	34	80	92	0	0	80	92	0	0
Merlot	3,663	1,296	1,425	942	3,035	1,238	958	838	3,037	1,238	687	1,112
Meunier	5	35	0	0	13	35	0	0	13	35	0	0
Nebbiolo	1	0	0	1	1	3	0	0	1	7	0	0
Other Red	1	0	10	0	1	0	18	0	1	0	18	0
Petit Verdot	233	83	112	37	175	81	121	0	175	81	18	75
Pinot Noir	287	314	203	0	779	316	206	258	815	316	79	420
Sangiovese	14	0	0	14	49	0	0	49	49	0	0	49
Shiraz	8,616	6,493	3,045	0	9,306	6,477	2,385	444	9,306	6,487	1,461	1,358
Tempranillo	32	2	0	30	41	2	0	39	41	2	0	39
Total red winegrapes	41,216	21,790	15,137	4,289	34,749	21,675	10,696	2,378	34,820	21,293	7,286	6,241
White winegrapes												
Chardonnay	4,952	2,219	1,598	1,134	4,299	2,219	1,479	601	4,299	2,219	825	1,254
Pedro Ximenes	9	10	0	0	9	10	0	0	9	10	0	0
Riesling	674	1,097	90	0	1,249	1,098	82	69	1,249	1,098	0	151
Sauvignon Blanc	1,765	465	199	1,100	2,423	609	221	1,593	2,809	779	61	1,968
Semillon	113	29	4	80	139	32	4	102	139	32	0	106
Traminer	1	37	0	0	24	37	0	0	24	37	0	0
Total white winegrapes	7,514	3,857	1,892	1,765	8,143	4,006	1,785	2,352	8,528	4,175	887	3,466
Total all winegrapes	48,730	25,648	17,029	6,054	42,892	25,680	12,482	4,730	43,348	25,468	8,173	9,707

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

² A raising factor of 1.02 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.