

# Coonawarra

## COONAWARRA VINTAGE OVERVIEW



### *Vintage Report*

The 2005 vintage will be remembered as comparatively compact with average to slightly below average yields and warm dry conditions throughout, making for trouble-free harvest management.

The early vintage can be traced back to the start of the season, with early budburst and excellent shoot growth resulting from a wet winter and fine spring conditions. Flowering was also a little earlier and the weather was favourable for the most part but cooler conditions towards the end of flowering did inhibit fruit set in some vineyards.

Late spring and summer were generally mild, with a noticeable absence of periods of hot weather. This, along with the very dry summer and autumn, provided for a near ideal season in which the vines were comfortably able to ripen their fruit.

Chardonnay, Riesling and Sauvignon Blanc all benefited from the mild summer and the majority of fruit was picked with high acid, lovely mineral elements and slightly austere fruit characters.

Winemakers are particularly pleased with Cabernet Sauvignon, Merlot, Petit Verdot and Cabernet Franc, all of which have good varietal characteristics and structure with a rich ripe flavour profile and generous ripe tannins, albeit with higher alcohol than normally expected.

Coonawarra Vignerons Association  
Coonawarra Grapegrowers Association

### *Overview of vintage statistics*

Coonawarra produced 36,513 tonnes in 2005 – a 40% drop after the record 2004 harvest of over 60,000 tonnes. 84% of the region's production was in red varieties, compared with 64% across the state. The average purchase value for Cabernet Sauvignon dropped by around \$100 per tonne, while the average value for Chardonnay dropped by over \$250 per tonne. This, combined with lower production led to a reduction in total income to growers by more than 50%, and the total value of grapes to the region decreased from just under \$69 million in 2004 to \$36 million.

The forecast is for estimated intake to remain at around 43,000 tonnes for the next five years, while preferred intake is around 39,000t. Cabernet Sauvignon accounts for more than half of the region's production, with Shiraz next at around 25%.

There were 90 hectares of new plantings in 2004 – about half that of the previous year. Over half of the new plantings were Cabernet Sauvignon, while most of the rest was Shiraz and Chardonnay.

Based on the current vineyard area in the region, and using estimated yield figures of 9t/ha for reds and 10t/ha for whites, the estimated production for Coonawarra in 2008 is around 52,000 tonnes. This is nearly 10,000 tonnes higher than the estimated intake, and 13,000 tonnes higher than the preferred intake for that year. Most of the estimated surplus is in Cabernet Sauvignon (9,400t) and Chardonnay (1,500t). However, the size of any actual surplus will depend on yield, contract commitments, price and other variables.



## COONAWARRA TONNES CRUSHED BY VARIETY - VINTAGE 2005

Table 6.1

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>									
Barbera	0	2	2	3	100%	67%	0	1	1
Cabernet Franc	280	142	421	230	34%	183%	12	6	13
Cabernet Sauvignon	9,884	8,378	18,263	15,944	46%	115%	23	26	39
Malbec	90	0	90	69	0%	130%	4	0	3
Merlot	1,358	1,395	2,753	2,272	51%	121%	18	17	30
Meunier (Pinot Meunier)	28	3	31	28	10%	111%	2	1	2
Other red	10	1	11	1	9%	110%	1	1	1
Petit Verdot	24	126	150	115	84%	130%	5	4	8
Pinot Noir	232	222	454	357	49%	127%	5	6	9
Shiraz	5,439	3,099	8,538	7,091	36%	120%	19	18	30
Tempranillo	5	1	6	3	17%	200%	1	1	1
<b>Total RED</b>	<b>17,349</b>	<b>13,370</b>	<b>30,719</b>	<b>26,114</b>	<b>44%</b>	<b>118%</b>			
<i>% of grand total</i>			<i>84%</i>	<i>84%</i>					
<b>WHITE</b>									
Chardonnay	2,240	1,080	3,320	2,559	33%	130%	11	12	20
Other white	19	0	19	19	0%	100%	1	0	1
Riesling	1,347	216	1,564	1,540	14%	102%	5	5	10
Sauvignon Blanc	365	459	824	730	56%	113%	6	7	12
Semillon	33	25	58	48	43%	121%	2	2	4
Traminer	10	0	10	10	0%	100%	1	0	1
<b>Total WHITE</b>	<b>4,014</b>	<b>1,780</b>	<b>5,794</b>	<b>4,906</b>	<b>31%</b>	<b>118%</b>			
<i>% of grand total</i>			<i>16%</i>	<i>16%</i>					
<b>Grand Total</b>	<b>21,363</b>	<b>15,150</b>	<b>36,513</b>	<b>31,020</b>	<b>41%</b>	<b>118%</b>			

## COONAWARRA CROP VALUE DATA - VINTAGE 2005

Table 6.2

Variety	Grower grown (t)	Total crushed (t)	Estimated total value purchased grapes	Estimated total value total grapes	Lowest price <sup>1</sup>	Highest price	Calc average purchase value per tonne	qualifier <sup>2</sup>
<b>RED</b>								
Barbera	2	2	\$2,400	\$2,400			\$1,200	100%
Cabernet Franc	142	421	\$92,780	\$276,308	\$440	\$1,500	\$656	100%
Cabernet Sauvignon	8,378	18,263	\$8,679,463	\$18,918,884	\$200	\$3,600	\$1,036	100%
Malbec	0	90	\$0	\$87,126			\$0	
Merlot	1,395	2,753	\$1,265,044	\$2,496,251	\$231	\$2,125	\$907	100%
Meunier (Pinot Meunier)	3	31	\$3,000	\$30,700			\$1,000	100%
Other red	1	11	\$954	\$10,491			\$954	100%
Petit Verdot	126	150	\$149,199	\$176,946	\$800	\$1,500	\$1,181	100%
Pinot Noir	222	454	\$170,386	\$347,898	\$350	\$1,400	\$766	100%
Shiraz	3,099	8,538	\$2,553,428	\$7,034,738	\$200	\$1,624	\$824	100%
Tempranillo	1	6	\$1,200	\$7,200			\$1,200	100%
<b>Total RED</b>	<b>13,370</b>	<b>30,719</b>	<b>\$12,917,854</b>	<b>\$29,388,942</b>				
<b>WHITE</b>								
Chardonnay	1,080	3,320	\$1,284,688	\$3,950,202	\$505	\$2,000	\$1,190	100%
Other white	0	19	\$0	\$22,195			\$0	
Riesling	216	1,564	\$183,406	\$1,325,806	\$470	\$1,300	\$848	100%
Sauvignon Blanc	459	824	\$614,465	\$1,102,484	\$1,000	\$2,400	\$1,338	100%
Semillon	25	58	\$19,156	\$44,319			\$766	100%
Traminer	0	10	\$0	\$11,806			\$0	
<b>Total WHITE</b>	<b>1,780</b>	<b>5,794</b>	<b>\$2,101,715</b>	<b>\$6,456,812</b>				
<b>Total all varieties</b>	<b>15,150</b>	<b>36,513</b>	<b>\$15,019,568</b>	<b>\$35,845,754</b>				

<sup>1</sup> The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

<sup>2</sup> This indicates the percentage of purchased fruit for which pricing information was supplied.



## COONAWARRA ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2006 TO 2010

Table 6.3

Variety	2006			2007			2008			2009			2010		
	estimated	preferred	qualifier <sup>1</sup>	estimated	preferred	qualifier	estimated	preferred	qualifier	estimated	preferred	qualifier	estimated	preferred	qualifier
<b>RED</b>															
Barbera	3	3	100%	3	3	100%	3	3	100%	3	3	100%	3	3	100%
Cabernet Franc	401	263	100%	401	269	100%	401	270	100%	401	270	100%	401	271	100%
Cabernet Sauvignon	23,124	18,933	94%	23,130	19,989	94%	22,403	20,342	94%	22,379	20,746	94%	22,381	20,595	94%
Malbec	121	95	100%	124	95	100%	124	95	100%	124	95	100%	124	95	100%
Merlot	3,148	2,658	86%	3,233	2,740	86%	3,454	2,993	86%	3,466	3,028	86%	3,316	3,047	86%
Meunier (Pinot Meunier)	13	13	90%	8	8	56%	8	8	56%	8	8	56%	8	8	56%
Other red	21	10	100%	23	12	100%	29	18	100%	29	18	100%	29	18	100%
Petit Verdot	136	136	71%	138	138	71%	144	144	71%	144	144	71%	144	144	71%
Pinot Noir	477	283	100%	429	247	100%	429	247	100%	409	227	96%	475	181	96%
Shiraz	9,961	9,377	95%	10,330	9,861	94%	10,794	10,427	94%	10,794	10,535	94%	10,647	10,446	94%
Tempranillo	5	3	100%	5	3	100%	5	3	100%	5	3	100%	5	3	100%
<b>Total RED</b>	<b>37,411</b>	<b>31,774</b>		<b>37,825</b>	<b>33,365</b>		<b>37,795</b>	<b>34,550</b>		<b>37,763</b>	<b>35,077</b>		<b>37,534</b>	<b>34,811</b>	
<b>WHITE</b>															
Chardonnay	3,415	2,574	99%	3,476	2,711	99%	3,515	2,741	99%	3,497	2,751	99%	3,622	2,719	99%
Other white	15	15	100%	15	15	100%	15	15	100%	15	15	100%	15	15	100%
Riesling	1,199	1,223	100%	1,310	1,318	100%	1,178	1,202	100%	1,185	1,202	100%	1,259	1,202	100%
Sauvignon Blanc	661	708	100%	644	706	100%	556	731	100%	578	764	100%	593	788	100%
Semillon	27	22	100%	17	12	75%	17	12	75%	17	12	75%	17	12	75%
Traminer	36	36	100%	36	36	100%	36	36	100%	36	36	100%	36	36	100%
Viognier	10	25	0%	12	25	0%	15	25	0%	25	25	0%	25	25	0%
<b>Total WHITE</b>	<b>5,363</b>	<b>4,603</b>		<b>5,510</b>	<b>4,823</b>		<b>5,332</b>	<b>4,762</b>		<b>5,353</b>	<b>4,805</b>		<b>5,567</b>	<b>4,797</b>	
<b>Total all varieties</b>	<b>42,774</b>	<b>36,376</b>		<b>43,335</b>	<b>38,187</b>		<b>43,127</b>	<b>39,312</b>		<b>43,116</b>	<b>39,882</b>		<b>43,101</b>	<b>39,608</b>	

<sup>1</sup> This indicates the percentage of crushed fruit in the current vintage for which forecast intake data was supplied.

## COONAWARRA SUPPLY VS DEMAND FORECASTS 2006 AND 2008

Table 6.4

Variety	2006					2008				
	estimated bearing area (ha) <sup>1</sup>	estimated production (tonnes) <sup>2</sup>	preferred intake (tonnes) <sup>3</sup>	Difference (tonnes)	% difference	estimated bearing area (ha) <sup>1</sup>	estimated production (tonnes) <sup>2</sup>	preferred intake (tonnes) <sup>3</sup>	Difference (tonnes)	% difference
<b>RED</b>										
Barbera	0	0	3	-3	-	0	0	3	-3	-
Cabernet Franc	37	333	263	70	21%	37	333	270	63	19%
Cabernet Sauvignon	3,189	28701	18,933	9,768	34%	3,312	29808	20,342	9,466	32%
Malbec	18	162	95	67	41%	18	162	95	67	41%
Merlot	421	3789	2,658	1,131	30%	424	3816	2,993	823	22%
Other red	5	45	23	22	49%	4	36	26	10	28%
Petit Verdot	24	216	136	80	37%	24	216	144	72	33%
Pinot Noir	47	423	283	140	33%	47	423	247	176	42%
Shiraz	1,062	9558	9,377	181	2%	1,167	10503	10,427	76	1%
Tempranillo	0	0	3	-3	-	1	9	3	6	67%
<b>Red Total</b>	<b>4,803</b>	<b>43227</b>	<b>31,774</b>	<b>11,453</b>	<b>26%</b>	<b>5,034</b>	<b>45306</b>	<b>34,550</b>	<b>10,756</b>	<b>24%</b>
<b>WHITE</b>										
Chardonnay	398	3980	2,574	1,406	35%	421	4210	2,741	1,469	35%
Other white	2	20	15	5	25%	2	20	15	5	25%
Riesling	145	1450	1,223	227	16%	150	1500	1,202	298	20%
Sauvignon Blanc	73	730	708	22	3%	76	760	731	29	4%
Semillon	4	40	22	18	45%	4	40	12	28	70%
Traminer	2	20	36	-16	-80%	2	20	36	-16	-80%
Viognier	1	10	25	-15	-150%	3	30	25	5	17%
<b>White Total</b>	<b>625</b>	<b>6250</b>	<b>4,603</b>	<b>1,647</b>	<b>26%</b>	<b>657</b>	<b>6570</b>	<b>4,762</b>	<b>1,808</b>	<b>28%</b>
<b>Grand Total</b>	<b>5,428</b>	<b>49477</b>	<b>36,376</b>	<b>13,101</b>	<b>26%</b>	<b>5,691</b>	<b>51876</b>	<b>39,312</b>	<b>12,564</b>	<b>24%</b>

*This table compares estimated future production (supply) - based on planting data - with estimated future demand (preferred intake). This gives a better indication of possible shortfalls and surpluses than comparing estimated with preferred intake, as estimated intake does not necessarily account for all production of a given variety.*

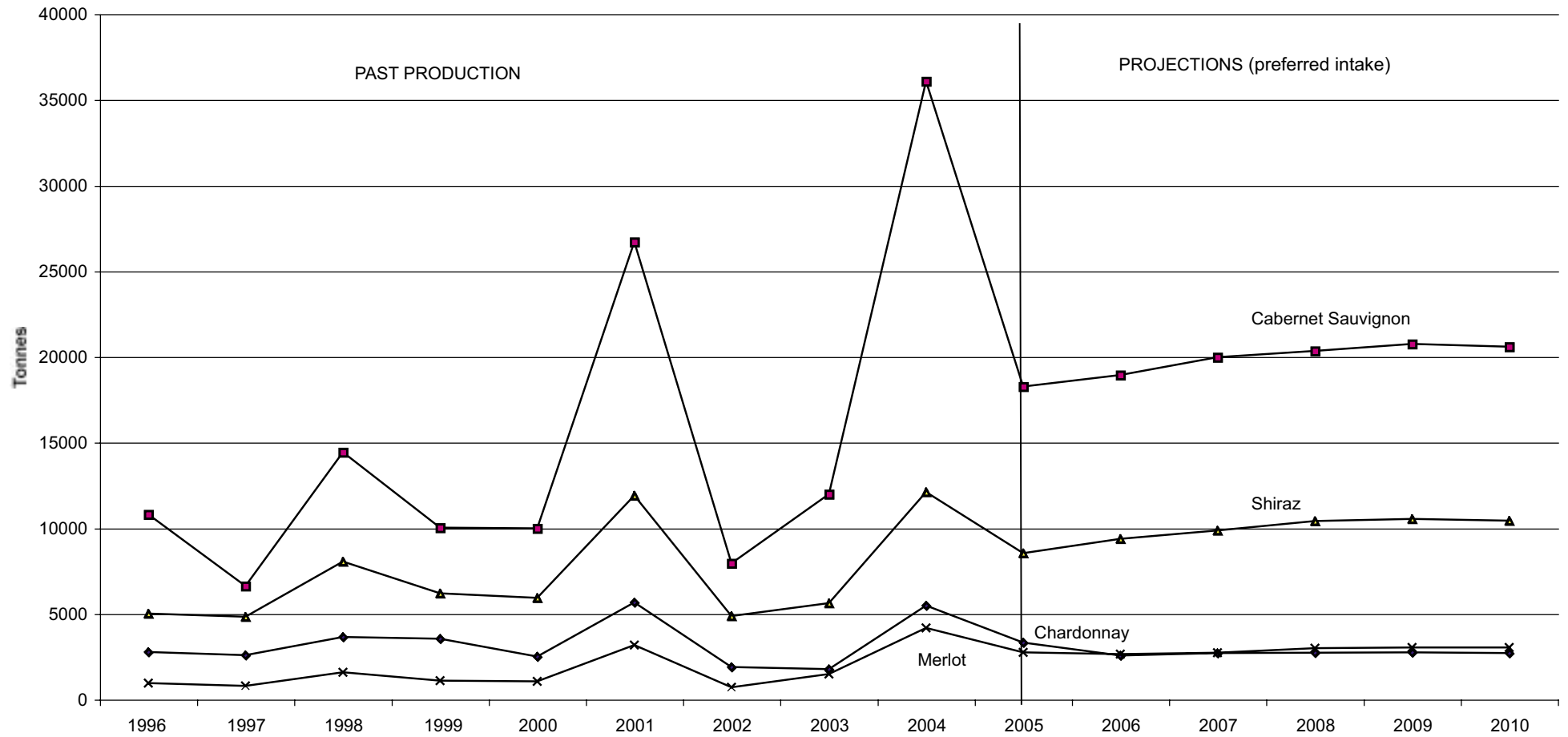
- (1) Planting data derived from PGIB vineyard register. Bearing area includes plantings more than three years old.  
 (2) Bearing area multiplied by yield estimate of 9t/ha for reds and 10t/ha for whites.  
 (3) Taken from the Utilisation and Pricing survey (see previous page).



# COONAWARRA PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1996 - 2010

Figure 6.1

Past production and projections (major varieties)



## COONAWARRA CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 6.5

Variety	Current area in hectares by year planted						Total area	% planted in 2004
	Pre-2000	2000	2001	2002	2003	2004		
<b>RED WINEGRAPES</b>								
BARBERA	0	0	0	0	0	0	0	0%
CABERNET FRANC	37	0	0	0	0	0	37	0%
CABERNET SAUVIGNON	2945	115	69	61	73	50	3312	1%
MALBEC	18	0	0	0	0	0	18	0%
MERLOT	319	48	51	4	2	1	424	0%
NEBBIOLO	0	0	0	0	0	0	0	0%
PETIT VERDOT	19	0	3	1	0	0	24	0%
PINOT NOIR	47	0	0	0	0	0	47	0%
SANGIOVESE	0	0	0	0	0	0	0	0%
SHIRAZ	914	43	33	72	86	19	1167	2%
TEMPRANILLO	0	0	0	0	0	1	1	84%
OTHER RED	3	0	0	2	0	0	4	0%
<b>TOTAL RED WINEGRAPES</b>	<b>4301</b>	<b>206</b>	<b>156</b>	<b>139</b>	<b>161</b>	<b>71</b>	<b>5034</b>	<b>1%</b>
<b>WHITE WINEGRAPES</b>								
CHARDONNAY	359	0	12	27	6	17	421	4%
RIESLING	133	0	1	11	2	3	150	2%
SAUVIGNON BLANC	69	0	3	0	3	0	76	0%
SEMILLON	4	0	0	0	0	0	4	0%
TRAMINER	2	0	0	0	0	0	2	0%
VIOGNIER	1	0	0	0	2	0	3	0%
OTHER WHITE	2	0	0	0	0	0	2	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>570</b>	<b>0</b>	<b>17</b>	<b>38</b>	<b>13</b>	<b>20</b>	<b>657</b>	<b>3%</b>
<b>TOTAL ALL VARIETIES</b>	<b>4871</b>	<b>206</b>	<b>173</b>	<b>177</b>	<b>173</b>	<b>91</b>	<b>5691</b>	<b>2%</b>

