



# Padthaway

## PADTHAWAY VINTAGE OVERVIEW



### Vintage Report

The 2004/05 season for Padthaway was one of contrasting conditions. It was only slightly warmer than normal, with the heat summation being about five percent above the average of the last 20 years. There were two short periods when the maximum temperatures exceeded 40°C and yet on 3<sup>rd</sup> February the maximum temperature was only 15°C.

The winter rainfall recordings were about 10% above average and very good rainfall was recorded in August to start the season.

September was very mild whilst October was considerably warmer than average. A very good budburst occurred slightly earlier than the last few seasons. The spring was virtually frost-free with no crop losses being reported. These temperat conditions during spring resulted in a relatively short flowering period and were very favourable for fruit set.

Good rains were recorded in November and temperatures were relatively warm, encouraging good vine growth.

December and January were generally mild to warm, and February was significantly cooler than normal. At the start of February, while some varieties were completing veraison, there was a period of very cool weather that seems to have impacted on the final fruit flavour and tannin development at maturity.

This was a season of very low disease pressure with virtually no symptoms of mildew.

Vintage commenced in mid-February. Conditions remained relatively warm to mild and dry - ideal for the ripening crop. The quality of both white and red varieties was very good to excellent with Chardonnay and Shiraz being the highlights.

Graham Kaye

President, Padthaway Grape Growers Association

### Overview of vintage statistics

Padthaway produced 33,659 tonnes in 2005 – a 34% drop after the record 2004 harvest. 52% of the region's production was in red varieties, compared with 64% across the state. The average purchase value for Chardonnay and Riesling dropped by around \$100 per tonne, while the price of Cabernet Sauvignon increased by \$60 per tonne. Because of the greatly reduced yield, the total value of grapes to the region decreased by 37% from just under \$55 million in 2004 to \$35 million.

The forecast is for estimated intake to remain at around 37,000 tonnes for the next five years, while preferred intake increases from 33,000 tonnes in 2006 to 36,500 tonnes in 2010. Chardonnay accounts for 33% of the preferred intake, with Cabernet Sauvignon next at 14%.

There were 106 hectares of new plantings in 2004 – about 3% of the total area. There were roughly equal areas of Shiraz, Chardonnay and Pinot Gris planted. In the case of Pinot Gris, all 38 hectares were planted in the last two years.

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 Padthaway in 2008 is around 35,000 tonnes. This is slightly less than the preferred intake for that year, giving an estimated 3% shortfall. Most of the estimated shortfall is in Chardonnay (2200t) and Merlot (1300t), while there is an expected surplus of Cabernet Sauvignon (2000t).

2005

## PADTHAWAY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 12.1

Variety	Current area in hectares by year planted						Total area	% planted in 2004
	Pre-2000	2000	2001	2002	2003	2004		
<b>RED WINEGRAPES</b>								
CABERNET FRANC	12	0	0	0	0	0	12	0%
CABERNET SAUVIGNON	719	72	15	0	0	0	806	0%
MALBEC	22	0	0	0	0	0	22	0%
MERLOT	169	0	7	0	0	0	176	0%
PETIT VERDOT	5	0	0	0	0	0	5	0%
PINOT NOIR	95	3	0	0	0	0	98	0%
SANGIOVESE	0	4	0	0	0	0	4	0%
SHIRAZ	760	75	104	66	11	28	1043	3%
OTHER RED	1	0	0	0	0	0	1	0%
<b>TOTAL RED WINEGRAPES</b>	<b>1782</b>	<b>154</b>	<b>125</b>	<b>66</b>	<b>11</b>	<b>28</b>	<b>2166</b>	<b>1%</b>
<b>WHITE WINEGRAPES</b>								
CHARDONNAY	725	18	67	79	69	32	991	3%
MUSCAT BLANC	12	0	0	0	0	0	12	0%
PINOT GRIS	0	0	0	0	6	32	38	85%
RIESLING	285	0	17	0	0	0	302	0%
SAUVIGNON BLANC	51	0	0	0	13	15	79	19%
SEMILLON	46	0	0	0	0	0	46	0%
TRAMINER	30	0	0	0	9	0	39	0%
VERDELHO	34	0	0	0	0	0	34	0%
VIIGNIER	4	4	5	0	6	0	19	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>1188</b>	<b>22</b>	<b>89</b>	<b>79</b>	<b>104</b>	<b>79</b>	<b>1560</b>	<b>5%</b>
<b>TOTAL ALL VARIETIES</b>	<b>2970</b>	<b>176</b>	<b>215</b>	<b>145</b>	<b>115</b>	<b>106</b>	<b>3726</b>	<b>3%</b>



## PADTHAWAY TONNES CRUSHED BY VARIETY - VINTAGE 2005

Table 12.2

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 WINEGRAPES</b>									
Cabernet Franc	100	0	100	59	0%	169%	2	0	1
Cabernet Sauvignon	2,434	2,650	5,084	4,278	52%	119%	6	13	13
Malbec	59	45	104	20	43%	521%	2	1	1
Merlot	1,525	433	1,958	1,451	22%	135%	5	8	8
Meunier (Pinot Meunier)	4	0	4	4	0%	100%	1	0	1
Petit Verdot	58	0	58	30	0%	196%	2	0	1
Pinot Noir	1,166	126	1,292	887	10%	146%	4	2	4
Sangiovese	0	39	39	40	100%	97%	0	1	1
Shiraz	4,160	4,630	8,791	7,939	53%	111%	6	15	17
<b>Total RED</b>	<b>9,506</b>	<b>7,923</b>	<b>17,430</b>	<b>14,709</b>	<b>45%</b>	<b>118%</b>			
<i>% of grand total</i>			52%	48%					
<b>WHITE WINEGRAPES</b>									
Arneis	3	0	3	3	0%	100%	1	0	1
Chardonnay	7,362	3,584	10,946	10,661	33%	103%	7	14	17
Muscat Blanc	105	0	105	105	0%	100%	1	0	1
Riesling	3,213	165	3,378	3,297	5%	102%	3	1	2
Sauvignon Blanc	394	171	565	529	30%	107%	4	4	7
Semillon	468	183	651	619	28%	105%	2	2	4
Traminer	239	0	239	358	0%	67%	2	0	2
Verdelho	217	43	260	264	17%	99%	2	2	4
Viognier	28	55	83	220	66%	38%	1	2	2
<b>Total WHITE</b>	<b>12,029</b>	<b>4,200</b>	<b>16,230</b>	<b>16,054</b>	<b>26%</b>	<b>101%</b>			
<i>% of grand total</i>			48%	52%					
<b>Grand Total</b>	<b>21,536</b>	<b>12,123</b>	<b>33,659</b>	<b>30,764</b>	<b>36%</b>	<b>109%</b>			

## PADTHAWAY CROP VALUE DATA - VINTAGE 2005

Table 12.3

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>								
Cabernet Franc	0	100	\$0	\$100,879			\$0	
Cabernet Sauvignon	2,650	5,084	\$2,533,604	\$4,860,927	\$250	\$2,967	\$956	100%
Malbec	45	104	\$15,718	\$36,484			\$350	100%
Merlot	433	1,958	\$448,001	\$2,025,415	\$250	\$1,690	\$1,035	100%
Meunier (Pinot Meunier)	0	4	\$0	\$3,819			\$0	
Petit Verdot	0	58	\$0	\$58,343			\$0	
Pinot Noir	126	1,292	\$96,562	\$986,784			\$764	100%
Sangiovese	39	39	\$57,915	\$57,915			\$1,500	100%
Shiraz	4,630	8,791	\$4,777,141	\$9,069,509	\$250	\$1,813	\$1,032	99%
<b>Total RED</b>	<b>7,923</b>	<b>17,430</b>	<b>\$7,928,941</b>	<b>\$17,200,074</b>				
<b>WHITE</b>								
Arneis	0	3	\$0	\$2,941			\$0	
Chardonnay	3,584	10,946	\$4,091,057	\$12,496,130	\$500	\$1,500	\$1,142	100%
Muscat Blanc	0	105	\$0	\$118,188			\$0	
Riesling	165	3,378	\$164,640	\$3,377,660			\$1,000	100%
Sauvignon Blanc	171	565	\$193,802	\$639,689	\$1,000	\$1,200	\$1,131	100%
Semillon	183	651	\$164,655	\$586,675			\$901	100%
Traminer	0	239	\$0	\$269,364			\$0	
Verdelho	43	260	\$38,730	\$233,519			\$897	100%
Viognier	55	83	\$79,449	\$119,644			\$1,446	100%
<b>Total WHITE</b>	<b>4,200</b>	<b>16,230</b>	<b>\$4,732,333</b>	<b>\$17,843,809</b>				
<b>Total all varieties</b>	<b>12,123</b>	<b>33,659</b>	<b>\$12,661,274</b>	<b>\$35,043,883</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.



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

Table 12.4

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>															
Cabernet Franc	127	64	100%	127	64	100%	127	64	100%	127	64	100%	127	64	100%
Cabernet Sauvignon	7,525	5,839	99%	7,357	5,826	94%	6,263	5,162	94%	6,201	5,212	94%	6,201	5,262	94%
Malbec	47	0	57%	47	0	57%	47	0	57%	47	0	57%	47	0	57%
Merlot	1,653	1,330	99%	2,153	1,892	99%	2,979	2,873	99%	3,060	2,954	97%	3,181	3,175	97%
Petit Verdot	31	0	49%	31	0	49%	31	0	49%	31	0	49%	31	0	49%
Pinot Noir	1,325	900	98%	1,246	850	98%	1,258	893	98%	1,158	879	90%	1,158	879	90%
Sangiovese	49	50	100%	49	50	100%	0	60	0%	0	60	0%	0	60	0%
Shiraz	10,253	9,377	98%	10,417	9,869	98%	9,865	9,870	98%	9,181	9,539	97%	9,265	9,723	97%
<b>Total RED</b>	<b>21,010</b>	<b>17,560</b>		<b>21,427</b>	<b>18,551</b>		<b>20,570</b>	<b>18,922</b>		<b>19,805</b>	<b>18,708</b>		<b>20,010</b>	<b>19,163</b>	
<b>WHITE</b>															
Arneis	1	1	100%	1	1	100%	1	1	100%	1	1	100%	1	1	100%
Chardonnay	10,826	10,274	100%	11,504	10,836	100%	12,629	12,128	95%	12,514	12,062	93%	12,511	12,185	93%
Pinot Gris	0	0	0%	77	77	0%	111	111	0%	140	140	0%	140	140	0%
Riesling	2,896	3,034	100%	2,896	3,034	100%	2,719	2,857	100%	2,719	2,857	100%	2,719	2,857	100%
Sauvignon Blanc	690	683	100%	748	710	100%	770	737	100%	770	742	100%	770	742	100%
Semillon	537	536	76%	537	536	76%	116	115	21%	116	115	21%	116	115	21%
Traminer	382	415	100%	442	435	100%	524	485	100%	524	485	100%	524	535	100%
Verdelho	373	367	100%	373	367	100%	373	367	100%	373	367	100%	373	367	100%
Viognier	140	220	88%	145	270	88%	40	270	88%	46	320	88%	46	320	88%
<b>Total WHITE</b>	<b>15,845</b>	<b>15,530</b>		<b>16,722</b>	<b>16,266</b>		<b>17,282</b>	<b>17,071</b>		<b>17,203</b>	<b>17,089</b>		<b>17,200</b>	<b>17,262</b>	
<b>Grand Total</b>	<b>36,855</b>	<b>33,090</b>		<b>38,149</b>	<b>34,817</b>		<b>37,852</b>	<b>35,993</b>		<b>37,008</b>	<b>35,797</b>		<b>37,210</b>	<b>36,425</b>	

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

## PADTHAWAY SUPPLY VS DEMAND FORECASTS 2006 AND 2008

Table 12.5

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
Cabernet Franc	12	108	64	44	41%	12	108	64	44	41%
Cabernet Sauvignon	806	7254	5,839	1,415	20%	806	7254	5,162	2,092	29%
Malbec	22	198	0	198	100%	22	198	0	198	100%
Merlot	176	1584	1,330	254	16%	176	1584	2,873	-1,289	-81%
Petit Verdot	5	45	0	45	100%	5	45	0	45	100%
Pinot Noir	98	882	900	-18	-2%	98	882	893	-11	-1%
Sangiovese	4	36	50	-14	-39%	4	36	60	-24	-67%
Shiraz	1,004	9036	9,377	-341	-4%	1,043	9387	9,870	-483	-5%
<b>Red Total</b>	<b>2,127</b>	<b>19143</b>	<b>17,560</b>	<b>1,583</b>	<b>8%</b>	<b>2,166</b>	<b>19494</b>	<b>18,922</b>	<b>572</b>	<b>3%</b>
Arneis	0	0	1	-1	-	0	0	1	-1	#DIV/0!
Chardonnay	890	8900	10,274	-1,374	-15%	991	9910	12,128	-2,218	-22%
Pinot Gris	0	0	0	0	-	38	380	111	269	71%
Riesling	302	3020	3,034	-14	0%	302	3020	2,857	163	5%
Sauvignon Blanc	51	510	683	-173	-34%	79	790	737	53	7%
Semillon	46	460	536	-76	-17%	46	460	115	345	75%
Traminer	30	300	415	-115	-38%	39	390	485	-95	-24%
Verdelho	34	340	367	-27	-8%	34	340	367	-27	-8%
Viognier	13	130	220	-90	-69%	19	190	270	-80	-42%
<b>White Total</b>	<b>1,366</b>	<b>13660</b>	<b>15,530</b>	<b>-1,870</b>	<b>-14%</b>	<b>1,560</b>	<b>15600</b>	<b>17,071</b>	<b>-1,471</b>	<b>-9%</b>
<b>Grand Total</b>	<b>3,493</b>	<b>32803</b>	<b>33,090</b>	<b>-287</b>	<b>-1%</b>	<b>3,726</b>	<b>35094</b>	<b>35,993</b>	<b>-899</b>	<b>-3%</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).



# PADTHAWAY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 2000 - 2010

Figure 12.1

Past production and projections (major varieties)

