

Adelaide Plains

ADELAIDE PLAINS VINTAGE OVERVIEW

Vintage report

Above average rainfall and cool unseasonal weather patterns right through to December meant following spray programs was essential to keep the powdery mildew under control. Generally fruit set after flowering went well, although some growers had a slight decline in white varieties set.

A cool mild start to 2002 ensured slower ripening and high quality fruit resulting in exceptional flavour and texture.

Three days over 40°C in January resulted in some sunburn to Riesling with yields reduced by 20-30%. Harvest of whites began in the first week of February with Sauvignon Blanc. Sangiovese was harvested as late as the end of April.

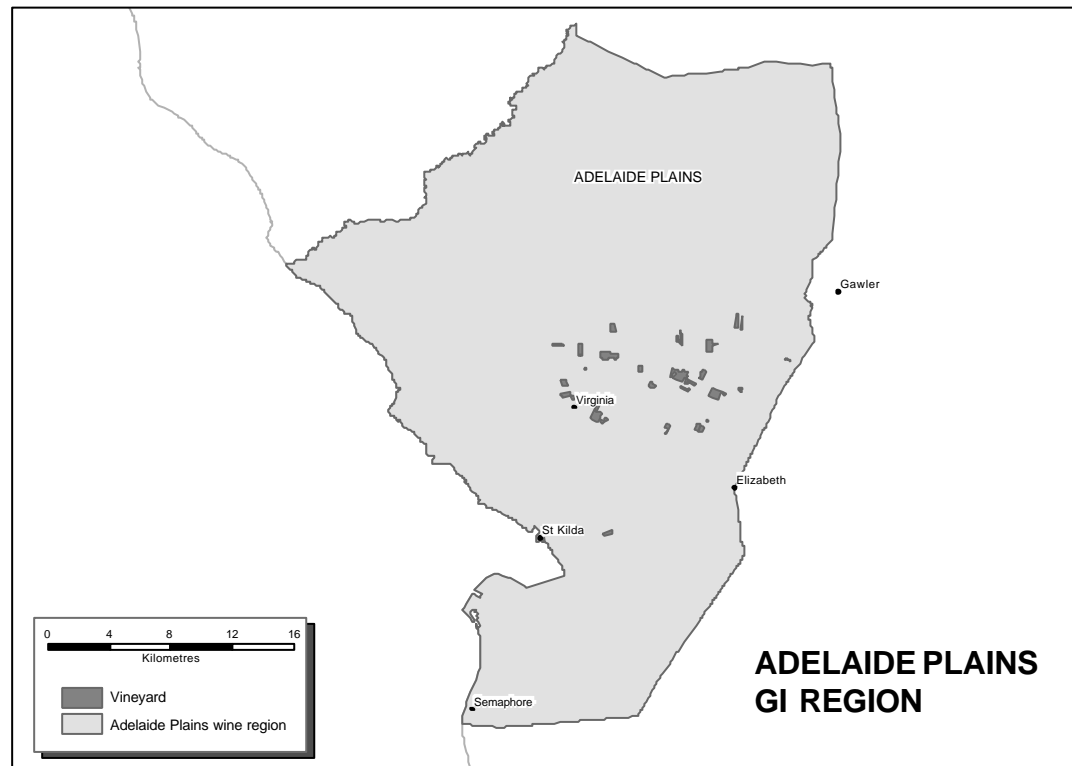
Tim Adams

Overview of vintage statistics

There were 6757 tonnes crushed in the Adelaide Plains region this year – a 13% increase on 2001, and 20% more than was required by the winemakers. Despite an oversupply of Chardonnay, the weighted average weighbridge price (WAWP) was \$130 higher than in 2001, while the WAWP of Cabernet Sauvignon dropped by a similar amount.

The forecast is for a decline in production from this region to just under 4000 tonnes by 2007. In particular, the production of Shiraz is expected to halve from just over 2000 tonnes this year to 1074 tonnes in 2007.

Despite these projections, new plantings in 2001 were still predominantly Shiraz (11 out of 18 hectares – an overall 4% increase in area for the region).



ADELAIDE PLAINS TONNES CRUSHED BY VARIETY - VINTAGE 2002

Table 3.1

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	Purchased	Preferred
RED									
Cabernet Franc	0	25	25	25	100%	99%	0	1	1
Cabernet Sauvignon	113	804	917	924	88%	99%	3	7	10
Grenache	5	400	405	305	99%	133%	1	6	6
Malbec	0	91	91	75	100%	121%	0	2	2
Mataro	0	62	62	78	100%	79%	0	1	1
Merlot	57	333	390	369	85%	106%	3	6	8
Nebbiolo	8	0	8	10	0%	76%	1	0	1
Petit Verdot	0	20	20	20	100%	100%	0	1	1
Pinot Noir	0	340	340	293	100%	116%	0	2	1
Ruby Cabernet	20	9	29	20	31%	145%	1	1	1
Sangiovese	0	64	64	10	100%	640%	0	2	1
Shiraz	187	1944	2131	2132	91%	100%	4	11	15
Zinfandel	0	14	14	14	100%	99%	0	1	1
Total RED	390	4105	4496	4275	91%	105%			
WHITE									
Chardonnay	20	1135	1156	923	98%	125%	1	5	7
Chenin Blanc	0	131	131	164	100%	80%	0	2	2
Colombard	130	44	174	160	25%	108%	1	2	1
Muscat Gordo Blanco	0	13	13	30	100%	43%	0	1	1
Other white	0	3	3	0	100%		0	1	0
Riesling	8	143	151	148	95%	102%	1	2	3
Sauvignon Blanc	0	374	374	367	100%	102%	0	4	3
Semillon	0	252	252	106	100%	237%	0	3	2
Verdelho	9	0	9	9	0%	100%	1	0	1
Total WHITE	167	2095	2262	1907	93%	119%			
Grand Total (red and white)	557	6200	6757	6182					

ADELAIDE PLAINS PRICE AND BAUME DATA - VINTAGE 2002

Table 3.2

Variety (1)	Grower grown	Total crushed	weighted average baumé		estimated total value		lowest price (2)	highest price (2)	weighted average weighbridge price (3)	
					purchased grapes	total grapes				
RED										
Cabernet Franc	25	25	14.6	100%	\$29,568	\$29,568			\$1,200	100%
Cabernet Sauvignon	804	917	14.1	100%	\$1,049,254	\$1,196,374	\$1,000	\$2,300	\$1,305	100%
Grenache	400	405	14.4	99%	\$405,580	\$410,948	\$450	\$1,400	\$1,015	100%
Malbec	91	91	13.8	100%	\$105,067	\$105,067			\$1,156	100%
Mataro	62	62	14.0	100%	\$65,197	\$65,197			\$1,052	100%
Merlot	333	390	13.8	100%	\$420,229	\$492,446	\$1,000	\$1,400	\$1,262	100%
Petit Verdot	20	20	14.0	100%	\$20,000	\$20,000			\$1,000	100%
Pinot Noir	340	340	10.8	100%	\$302,884	\$302,884			\$890	100%
Ruby Cabernet	9	29			\$10,860	\$34,860			\$1,200	100%
Sangiovese	64	64	14.4	100%	\$75,200	\$75,200			\$1,175	100%
Shiraz	1,944	2,131	14.1	100%	\$2,749,073	\$3,014,026	\$975	\$2,700	\$1,414	100%
Zinfandel	14	14	10.3	100%	\$11,096	\$11,096			\$800	100%
Total RED	4,105	4,488			\$5,244,008	\$5,757,665				
WHITE										
Chardonnay	1,135	1,156	13.0	100%	\$1,278,974	\$1,301,615	\$950	\$1,450	\$1,126	100%
Chenin Blanc	131	131	11.8	93%	\$83,947	\$83,947			\$643	100%
Colombard	44	174	11.6	40%	\$28,478	\$113,505			\$654	100%
Muscat Gordo Blanco	13	13			\$6,500	\$6,500			\$500	100%
Other white	3	3			\$1,102	\$1,103			\$350	100%
Riesling	143	151	11.6	100%	\$94,338	\$99,598			\$657	100%
Sauvignon Blanc	374	374	11.4	100%	\$316,829	\$316,829	\$500	\$1,015	\$847	100%
Semillon	252	252	11.8	100%	\$209,130	\$209,130	\$700	\$1,015	\$831	100%
Total WHITE	2,095	2,253			\$2,019,298	\$2,132,227				

(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 price does not include end use or other bonuses paid after the weighbridge.

ADELAIDE PLAINS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2003 T O 2007

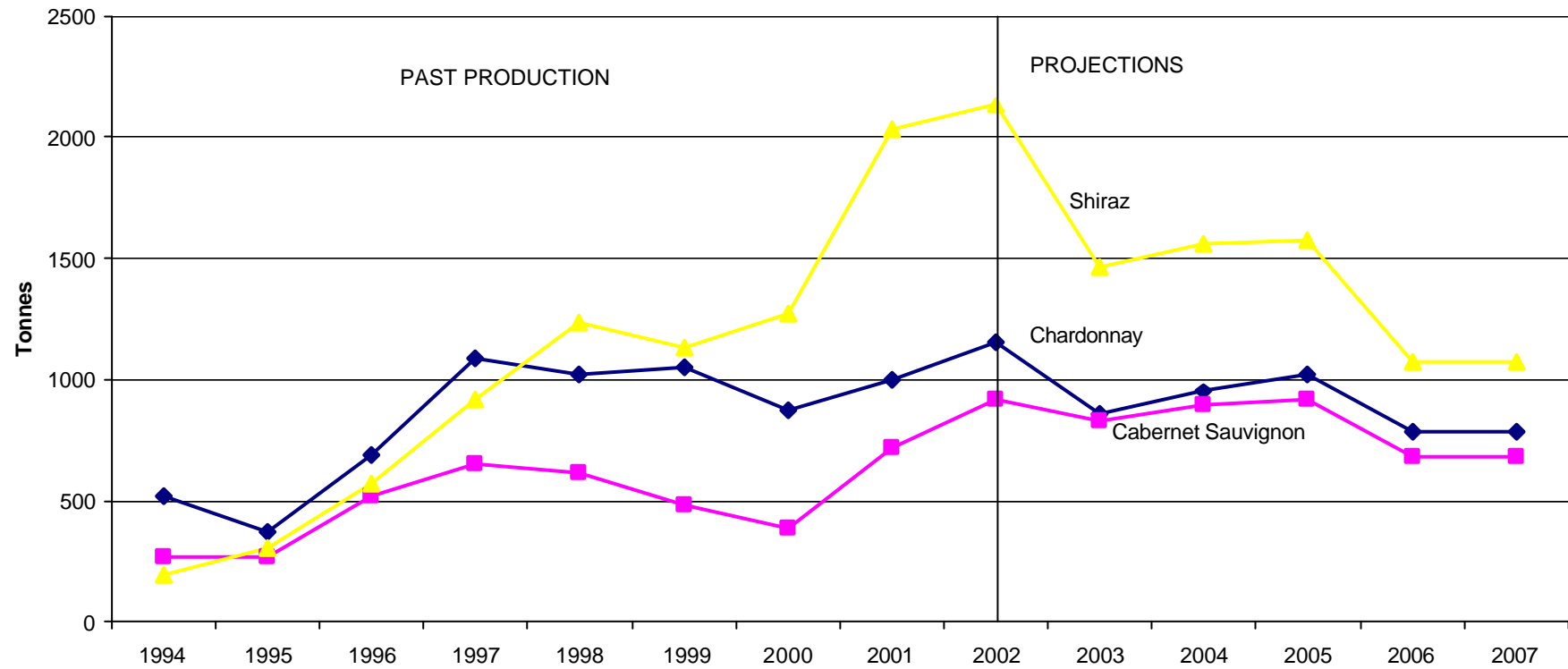
Table 3.3

Variety	2003		2004		2005		2006		2007	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Sauvignon	828	836	893	901	920	921	680	684	680	704
Grenache	265	265	270	270	270	270	240	240	240	240
Malbec	100	85	100	85	100	85	85	70	85	70
Mataro	0	0	0	0	0	0	0	0	0	0
Merlot	342	354	374	387	387	392	380	390	380	390
Nebbiolo	10	10	10	10	10	10	10	10	10	10
Petit Verdot	28	28	28	28	28	28	28	28	28	28
Pinot Noir	298	298	298	298	197	197	197	197	197	197
Ruby Cabernet	29	20	27	18	27	18	18	18	18	18
Sangiovese	60	10	60	10	10	10	10	10	10	10
Shiraz	1464	1331	1559	1426	1574	1441	1074	1021	1074	1031
Zinfandel	30	30	35	35	35	35	35	35	35	35
Total for RED	3454	3267	3654	3468	3558	3407	2757	2703	2757	2733
WHITE										
Chardonnay	861	700	951	750	1018	805	788	585	788	585
Chenin Blanc	10	10	10	10	10	10	10	10	10	10
Colombard	160	160	160	160	160	160	160	160	160	160
Muscat Gordo Blanco	30	30	30	30	30	30	30	30	30	30
Other white	3	0	3	0	3	0				
Riesling	144	155	145	155	45	110	45	110	45	110
Sauvignon Blanc	288	340	288	340	190	280	110	200	110	200
Semillon	119	119	119	119	119	119	40	40	40	40
Verdelho	9	12	9	12	9	12	9	12	9	12
Total for WHITE	1624	1526	1715	1576	1584	1526	1192	1147	1192	1147

ADELAIDE PLAINS PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1994 - 2007

Figure 3.1

Past production and projections (major varieties)



ADELAIDE PLAINS CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 3.4

Year planted - area in hectares

Variety	Pre-98	1998	1999	2000	2001	Total	% planted in 2001
RED WINEGRAPES							
CABERNET SAUVIGNON	38	10	-	5	1	55	2%
GRENACHE	22	1	-	1	4	28	14%
MALBEC	9	-	-	-	-	9	0%
MERLOT	16	3	-	5	-	24	0%
PINOT NOIR	16	-	-	-	-	16	0%
RUBY CABERNET	2	2	-	2	-	6	0%
SANGIOVESE	1	-	0	4	-	6	0%
SHIRAZ	97	30	2	8	11	148	8%
OTHER RED	7	0	2	0	1	10	13%
TOTAL RED WINEGRAPES	210	46	3	25	18	302	6%
WHITE WINEGRAPES							
CHARDONNAY	54	-	-	-	-	54	0%
CHENIN BLANC	10	-	-	-	-	10	0%
COLOMBARD	7	-	-	-	-	7	0%
RIESLING	17	-	-	-	-	17	0%
SAUVIGNON BLANC	25	-	-	-	-	25	0%
SEMILLON	8	-	-	-	-	8	0%
OTHER WHITE	5	0	0	0	0	5	0%
TOTAL WHITE WINEGRAPES	125	0	0	0	0	125	0%
TOTAL ALL VARIETIES	334	46	3	25	18	427	4%