

Barossa Valley regional vintage summary

BAROSSA VALLEY VINTAGE OVERVIEW

Vintage report

During the months of October and November, temperatures remained 2 – 3°C below average with average to above average rainfall. The cooler temperatures and wet soils retarded vine growth in some varieties and locations through these months and also extended the flowering period into December.

Through December, vine growth and bunch development continued to be very slow, as December temperatures remained approximately 3°C below the average with only a few days of 30°C occurring. Rainfall for December was almost half that of the average amount.

In keeping with the rest of the phenological stages, veraison was behind that of season 2000/2001. Veraison occurred unevenly throughout many blocks as well as throughout the bunches, with some bunches having both coloured and very green berries. Rainfall in January 2002 was again above average and temperatures slightly below average.

The seasonal conditions from November through February were conducive to powdery mildew, while rainfall events during the flowering period increased Botrytis spore loads in the bunches.

February and March saw a change in weather conditions (low rainfall levels with warm days and cool nights). This weather provided good ripening conditions and allowed good flavour and colour to develop in red grape varieties. These weather conditions ensued white grape varieties had higher than normal acid retention and delicate flavours.

Due to cool soil temperatures around budburst and poor conditions during set, overall crop levels were lower than average except in Semillon. Shiraz crops were 20-30% below average while Cabernet Sauvignon and Grenache crops were only slightly below average.

Given the lateness of the season in relation to 2000/2001 and the cooler conditions, the resulting red wines reveal intense colours and well developed middle palates, while the white wines display elegance with distinctive fruit characters.

Robin Nettelbeck

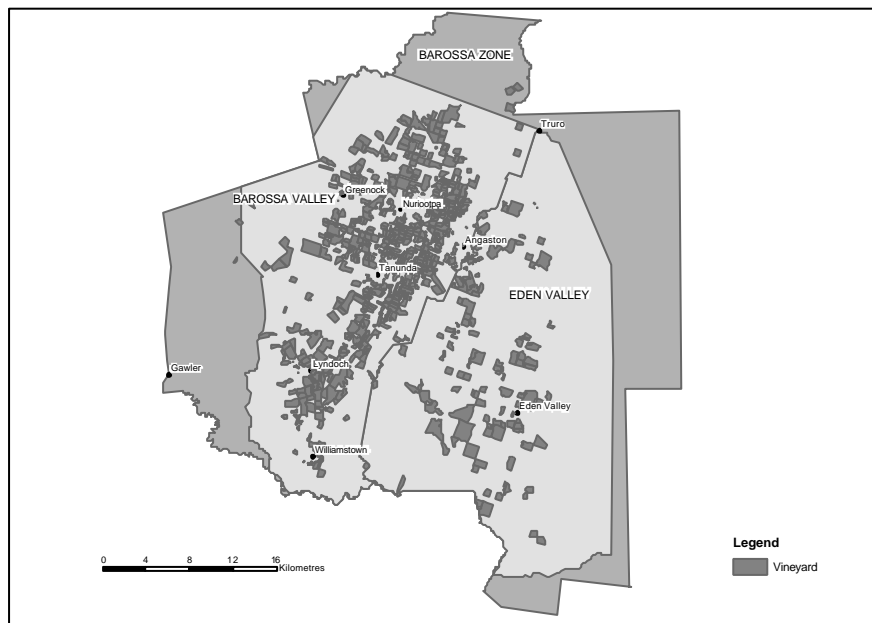
Overview of vintage statistics

There were 57,631 tonnes crushed from Barossa Valley vineyards in 2002 – an increase of just under 4,000 tonnes or 7% on 2001 – despite the low yielding vintage. This increase may be largely attributable to the substantial new plantings from 1998 and 1999 coming into full production. The match between supply and demand (tonnes preferred) was almost perfect (to within one tonne for reds!).

The weighted average weighbridge prices (WAWP) for Chardonnay and Riesling were up by around \$100 per tonne; on the other hand the WAWP of Cabernet Sauvignon was down by nearly \$100. Otherwise, prices remained very similar in the major varieties.

The forecast is for continued growth for both red and white varieties, with a slight shortfall in white varieties (Chardonnay and Riesling) expected in 2007. However, the preferred figure for 2006 has been revised downward by 4,000 tonnes since last year's survey, reducing the expected shortfall considerably. Shiraz will continue to increase its share of the region's total production – from 35% in 2002 to 42% in 2007.

New plantings have picked up again slightly, with 489 hectares of red varieties planted in 2001 (an 8% increase in red plantings). The forecast tables suggest that future shortfalls are actually going to be in white varieties, while the planting table shows that red varieties continue to be chosen by growers – with only 25 hectares of new white plantings in 2001. Table 1.10 on page 21 suggests that nearly 3000 hectares overall will need to be planted in the Barossa and Eden Valleys by 2004 to meet the demand for fruit in 2007 (assuming that yield remains constant).



BAROSSA VALLEY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 4.1

Area in hectares* by year planted

Variety	Pre-98	1998	1999	2000	2001	Total	% planted in 2001
RED WINEGRAPES							
CABERNET FRANC	57	1	-	3	1	61	1%
CABERNET SAUVIGNON	788	154	131	82	175	1330	13%
GRENACHE	561	5	26	16	9	616	1%
MALBEC	20	-	-	-	-	20	0%
MATARO	94	3	7	8	3	116	3%
MERLOT	122	27	28	31	58	266	22%
NEBBIOLO	0	-	5	10	-	15	0%
PETIT VERDOT	5	1	4	4	10	23	41%
PINOT NOIR	88	2	2	1	-	94	0%
SANGIOVESE	9	1	2	9	-	21	0%
SHIRAZ	2070	444	372	200	218	3305	7%
TEMPRANILLO	0	-	0	3	15	19	82%
OTHER RED	34	1	3	12	0	51	0%
TOTAL RED WINEGRAPES	3847	639	582	378	489	5937	8%
WHITE WINEGRAPES							
CHARDONNAY	524	0	-	6	4	535	1%
CHENIN BLANC	74	-	-	-	1	75	1%
MUSCADELLE	60	-	-	-	-	60	0%
MUSCAT BLANC	54	-	-	-	-	54	0%
PEDRO XIMENEZ	33	-	-	-	-	33	0%
RIESLING	379	-	17	11	6	413	1%
SAUVIGNON BLANC	97	4	3	-	-	103	0%
SEMILLON	748	4	5	2	2	761	0%
VIOGNIER	8	-	1	7	10	26	39%
OTHER WHITE	72	0	2	1	2	77	3%
TOTAL WHITE WINEGRAPES	2050	8	28	27	25	2138	1%
ROOTSTOCK BLOCK	0	-	15	-	-	15	0%
TOTAL ALL VARIETIES	5897	647	624	405	513	8090	6%

* Includes plantings in Barossa Zone-other (total 72 hectares)

BAROSSA VALLEY TONNES CRUSHED BY VARIETY (RED) - VINTAGE 2002

Table 4.2

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	Purchased	Preferred
RED									
Black Muscat	6	0	6	0	0%		1	0	0
Cabernet Franc	338	394	732	608	54%	120%	6	12	8
Cabernet Sauvignon	1371	5850	7221	7724	81%	93%	27	26	39
Gamay	0	3	3	0	100%		0	1	0
Grenache	543	3758	4300	3981	87%	108%	15	22	26
Malbec	50	77	128	148	60%	86%	8	7	9
Mataro	210	290	499	501	58%	100%	8	10	14
Merlot	495	1062	1557	1858	68%	84%	15	19	28
Muscat Brown	0	5	5	5	100%	100%	0	1	1
Nebbiolo	12	6	18	15	33%	117%	2	2	2
Other red	17	17	33	40	50%	84%	3	2	5
Petit Verdot	66	59	126	105	47%	120%	4	5	7
Pinot Noir	85	507	592	575	86%	103%	8	10	9
Ruby Cabernet	0	14	14	14	100%	102%	0	1	1
Sangiovese	19	65	84	83	78%	101%	2	2	2
Shiraz	3625	16553	20178	19952	82%	101%	30	32	43
Tempranillo	7	1	8	17	12%	49%	1	1	2
Tinta Amarella	0	22	22	19	100%	114%	0	1	1
Tinta Cao	0	32	32	0	100%		0	1	0
Tinta Molle	0	13	13	0	100%		0	1	0
Touriga	9	105	114	40	92%	288%	2	3	4
Zinfandel	0	27	27	29	99%	93%	1	2	2
Total RED	6853	28859	35712	35713	81%	100%			

BAROSSA VALLEY TONNES CRUSHED BY VARIETY (WHITE) - VINTAGE 2002

Table 4.3

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
WHITE									
Chardonnay	946	4157	5104	6366	81%	80%	14	17	21
Chenin Blanc	9	708	717	713	99%	101%	2	9	7
Crouchen	0	12	12	0	100%		0	2	0
Doradillo	5	5	10	5	52%	207%	1	3	1
Marsanne	7	0	7	0	0%		1	0	0
Muscadelle	5	309	315	287	98%	110%	1	9	7
Muscat Blanc	90	314	405	431	78%	94%	6	8	11
Other white	4	23	27	10	86%	269%	1	2	1
Palomino	140	69	209	127	33%	165%	3	3	3
Pedro Ximenes	116	160	276	186	58%	148%	3	8	6
Riesling	753	2107	2859	3557	74%	80%	15	18	26
Sauvignon Blanc	301	746	1047	875	71%	120%	6	12	9
Semillon	992	9804	10796	8792	91%	123%	17	24	31
Sylvaner	0	23	23	23	100%	101%	0	1	1
Traminer	8	57	65	30	87%	218%	1	3	2
Trebbiano	0	14	14	0	100%		0	3	0
Verdelho	0	24	24	0	100%		0	1	0
Viognier	9	0	9	73	0%	12%	1	0	3
Total WHITE	3385	18535	21919	21475	85%	102%			
Grand Total (red and white)	10238	47394	57631	57188					

BAROSSA VALLEY PRICE AND BAUME DATA (RED) - VINTAGE 2002

Table 4.4

Variety (1)	Grower grown	Total crushed	weighted average		estimated total value		lowest price (2)	highest price (2)	weighted average	
			baumé		purchased grapes	total grapes			weighbridge price (3)	
Cabernet Franc	394	732	14.0	86%	\$375,445	\$696,826	\$710	\$1,600	\$952	100%
Cabernet Sauvignon	5,850	7,221	13.8	81%	\$9,919,695	\$12,244,738	\$1,020	\$5,730	\$1,696	100%
Gamay	3	3	13.2	100%	\$3,376	\$3,376			\$993	100%
Grenache	3,758	4,300	14.2	75%	\$4,372,432	\$5,004,017	\$500	\$2,400	\$1,164	100%
Malbec	77	128	13.7	91%	\$102,147	\$168,962	\$1,055	\$1,750	\$1,323	99%
Mataro	290	499	14.1	64%	\$345,065	\$594,838	\$770	\$2,860	\$1,192	100%
Merlot	1,062	1,557	13.8	81%	\$1,709,768	\$2,506,362	\$960	\$2,600	\$1,610	100%
Muscat Brown	5	5			\$3,500	\$3,500			\$700	100%
Nebbiolo	6	18	13.8	83%	\$8,610	\$26,370			\$1,500	83%
Other red	17	33			\$19,078	\$38,444			\$1,153	100%
Petit Verdot	59	126	14.0	100%	\$97,923	\$207,735	\$0	\$3,575	\$1,654	100%
Pinot Noir	507	592	11.7	79%	\$498,954	\$582,387	\$700	\$1,690	\$984	100%
Ruby Cabernet	14	14	14.0	100%	\$11,456	\$11,456			\$800	100%
Sangiovese	65	84	13.8	100%	\$100,432	\$129,017			\$1,534	100%
Shiraz	16,553	20,178	14.3	84%	\$32,435,898	\$39,539,588	\$884	\$8,504	\$1,959	100%
Tempranillo	1	8			\$1,825	\$15,239			\$1,825	100%
Tinta Amarella	22	22	12.0	100%	\$28,132	\$28,132			\$1,300	100%
Tinta Cao	32	32	13.0	100%	\$19,056	\$19,056			\$600	100%
Tinta Molle	13	13	14.3	100%	\$14,058	\$14,058			\$1,100	100%
Touriga	105	114	13.8	97%	\$133,301	\$144,625			\$1,272	97%
Zinfandel	27	27	13.7	100%	\$51,840	\$52,618			\$1,947	100%
Total RED	28,859	35,706			\$50,251,991	\$62,031,346				

(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.

BAROSSA VALLEY PRICE AND BAUME DATA (WHITE) - VINTAGE 2002

Table 4.5

Variety (1)	Grower grown	Total crushed	weighted average		estimated total value		lowest	highest	weighted average	
			baumé		purchased grapes	total grapes	price (2)	price (2)	weighbridge price (3)	
Chardonnay	4,157	5,104	13.1	88%	\$4,681,802	\$5,747,261	\$848	\$1,650	\$1,126	100%
Chenin Blanc	708	717	11.6	72%	\$413,439	\$418,471	\$325	\$700	\$584	100%
Crouchen	12	12	11.5	67%	\$3,524	\$3,524			\$287	100%
Doradillo	5	10	12.1	82%	\$1,269	\$2,426	\$200	\$250	\$235	100%
Muscadelle	309	315	11.8	89%	\$171,564	\$174,581	\$300	\$1,573	\$555	99%
Muscat Blanc	314	405	13.1	56%	\$177,290	\$228,205	\$400	\$1,050	\$564	100%
Other white	23	27			\$13,920	\$16,128			\$600	64%
Palomino	69	209	11.2	68%	\$25,201	\$76,624	\$250	\$500	\$366	100%
Pedro Ximenes	160	276	12.3	71%	\$46,757	\$80,594	\$230	\$600	\$292	100%
Riesling	2,107	2,859	12.2	83%	\$1,984,594	\$2,693,579	\$487	\$1,900	\$942	100%
Sauvignon Blanc	746	1,047	12.0	93%	\$648,602	\$909,882	\$500	\$1,100	\$869	100%
Semillon	9,804	10,796	12.2	74%	\$8,636,277	\$9,510,390	\$400	\$1,400	\$881	100%
Sylvaner	23	23	13.4	100%	\$7,686	\$7,686			\$332	100%
Traminer	57	65	12.5	55%	\$40,387	\$46,249	\$485	\$850	\$706	100%
Trebbiano	14	14	10.9	42%	\$4,029	\$4,029	\$230	\$400	\$294	100%
Verdelho	24	24	14.1	100%	\$31,525	\$31,525			\$1,300	100%
Total WHITE	18,535	21,904			\$16,887,866	\$19,951,154				

(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.

BAROSSA VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2003 TO 2007

Table 4.6

Variety	2003		2004		2005		2006		2007	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	5	0	10	0	10	0	10	0	10	0
Black Muscat	20	20	20	20	20	20	20	20	20	20
Cabernet Franc	505	401	503	399	513	409	513	409	513	409
Cabernet Sauvignon	9145	9311	10392	10799	11464	11818	11973	12625	12105	13130
Grenache	4127	3900	4303	4197	4560	4552	4776	4959	4798	5292
Malbec	147	104	147	104	155	110	155	110	155	110
Mataro	731	799	803	830	846	859	877	895	879	897
Merlot	2173	2370	2527	2717	2932	3159	3206	3480	3279	3572
Nebbiolo	23	13	25	10	25	10	25	10	25	10
Other red	60	35	40	35	40	35	40	35	40	35
Petit Verdot	104	76	110	81	114	85	119	90	119	90
Pinot Noir	780	368	734	344	730	347	735	355	720	355
Sangiovese	133	81	101	86	101	86	101	86	101	86
Shiraz	26491	24408	29217	27112	31555	29590	33328	31452	33530	31863
Tempranillo	32	52	136	136	210	210	242	242	242	242
Tinta Cao	25	0	25	0	25	0	25	0	25	0
Touriga	127	34	122	30	122	30	122	30	122	30
Zinfandel	49	48	63	58	71	58	71	58	71	58
Total RED	44676	42019	49277	46958	53492	51377	56337	54856	56753	56198
WHITE										
Chardonnay	6453	7747	6770	8431	7076	9054	7366	9920	7376	10506
Chenin Blanc	526	358	464	358	387	293	379	293	379	293
Doradillo	10	10	10	10	10	10	10	10	10	10
Marsanne	9	9	9	9	9	9	9	9	9	9
Muscadelle	147	96	136	96	108	76	103	76	103	76
Muscat Blanc	470	485	475	507	488	526	443	497	453	520
Palomino	111	35	126	35	126	35	126	35	126	35
Pedro Ximenes	232	178	217	178	207	178	199	178	199	178
Riesling	3566	4017	3480	4127	3790	4306	3856	4553	3887	4653
Sauvignon Blanc	1000	884	996	988	955	972	931	976	931	976
Semillon	9003	7322	8897	7489	8778	7845	8730	8095	8521	8450
Other white	21	0	21	0	16	0	15	0	15	0
Traminer	58	30	63	30	63	30	58	30	58	30
Verdelho	30	0	36	0	36	0	42	0	42	0
Viognier	49	153	139	203	187	217	195	219	209	219
Total WHITE	21685	21324	21839	22461	22235	23551	22462	24891	22318	25955

BAROSSA VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1997 - 2007

Figure 4.1

Past production and projections (major varieties)

