

# Eden Valley

## EDEN VALLEY VINTAGE OVERVIEW

### Vintage report

Despite what was a difficult year in the Eden Valley region, the wines made from the 2002 vintage are of an exceptional quality. Most red grape varieties display excellent colours and flavour profiles, while the white varieties are producing delicate and well balanced wine.

The commencement of the growing season was wetter than usual, with the total rainfall for the month of September being 72% greater than the historical average. The first sign of bud-burst occurred with Chardonnay during the first and second week of September, which seemed to be slightly later than the 2000/2001 season.

Wet and cold conditions during spring created an undesirable environment for flowering, thus contributing to the poor set of a number of varieties. In addition, these poor conditions suited the infection of Botrytis.

December brought with it the end of the wet weather. However, the cool conditions remained, with the daily mean temperature being three degrees Celsius below that of a normal year. These conditions, in addition with a high percentage of cloudy days, were conducive to powdery mildew infection.

January was also unseasonably cool, and rainfall was 50% above the mean January average. In most grape varieties, veraison occurred approximately ten days later than the 2000/2001 season.

During the lead up to the vintage period, and during vintage itself, weather conditions defied the wet and cold seasonal trend. Generally, there was minimal rainfall and warmer temperatures throughout this period. These conditions allowed most vineyards to reach their minimum harvesting standards. The exception was those vineyards with crop-load or other management issues. Vintage began around the second week of March, and concluded in mid May. Cropping levels were generally lower than the average for Eden Valley. Riesling and Merlot were of particular concern, producing crops of up to 70% less than the average tonnes per hectare.

Robin Nettelbeck

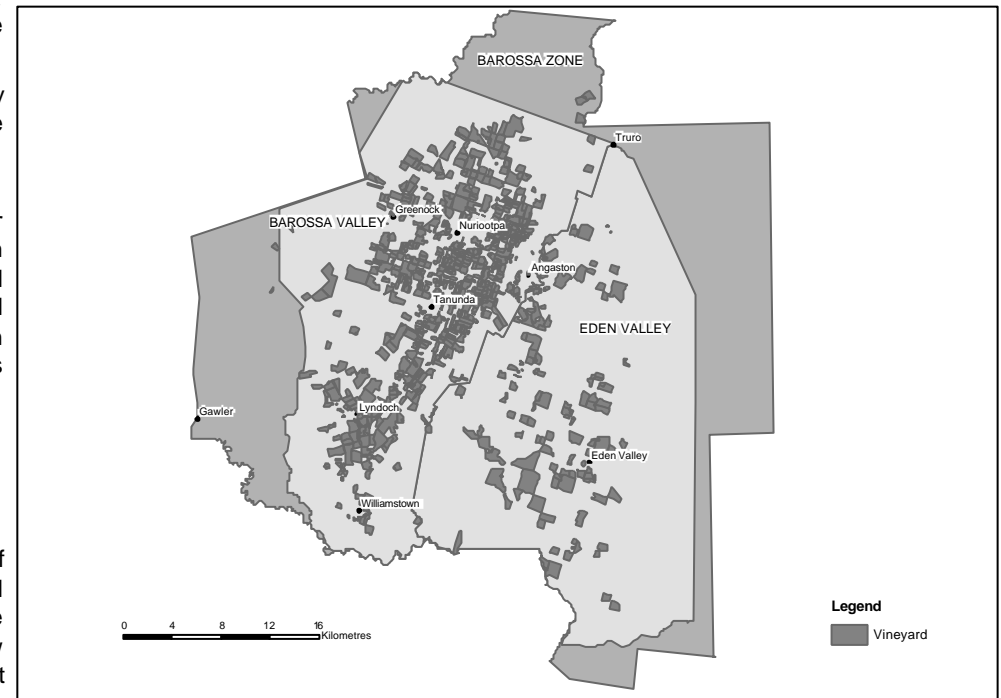
### Overview of vintage statistics

Eden Valley produced 8398 tonnes this vintage, compared with 11,281 in 2001 – a drop of 26%. This was in contrast to the slight increase in production in the Barossa Valley, and probably reflects the difficult seasonal conditions, which were not counterbalanced to the same extent by large areas of new vineyards coming into production. Despite the low tonnages, there was a 30% oversupply of reds (including nearly double the desired amount of Cabernet Sauvignon); conversely, there was a 60% shortfall in white varieties.

Consistent with trends in other regions, the weighted average weighbridge price (WAWP) of Cabernet Sauvignon was down by \$100 compared with 2001; conversely, Merlot was up by over \$200 and Riesling by nearly \$250 per tonne.

The five year forecast for Eden Valley is interesting. It shows slight growth in red varieties, despite the estimated tonnages being substantially in excess of the preferred amounts in each year. On the other hand, growth in white varieties fails to match demand across the forecast period. Like the Adelaide Hills, Eden Valley is expected to produce more white than red varieties – however, the differential is not as great as the winemakers would prefer!

Despite the forecast imbalance between supply and demand, new plantings in the region in 2001 were equally split between red varieties (mainly Cabernet Sauvignon) and white varieties (mainly Riesling). Given that the production of Cabernet Sauvignon is already more than double the demand, this may be a concern for growers in the region.



## EDEN VALLEY TONNES CRUSHED BY VARIETY - VINTAGE 2002

Table 7.1

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
<b>RED</b>									
Cabernet Franc	15	8	24	22	36%	107%	3	1	4
Cabernet Sauvignon	800	700	1500	799	47%	188%	8	11	12
Grenache	31	58	89	45	65%	199%	3	4	4
Mataro	0	18	18	19	100%	97%	0	2	2
Merlot	145	72	217	224	33%	97%	8	8	9
Meunier	24	0	24	34	0%	71%	2	0	2
Muscat Brown	0	2	2	0	100%		0	1	0
Nebbiolo	0	0	0	5		0%	0	0	1
Pinot Noir	157	178	335	322	53%	104%	5	8	9
Sangiovese	1	5	6	6	85%	97%	1	1	1
Shiraz	645	1514	2158	1657	70%	130%	7	13	12
Tempranillo	0	0	0	10		0%	0	0	1
Zinfandel	5	0	5	5	0%	100%	1	0	1
<b>Total RED</b>	<b>1822</b>	<b>2556</b>	<b>4379</b>	<b>3148</b>	<b>58%</b>	<b>139%</b>			
<b>WHITE</b>									
Chardonnay	636	706	1342	2744	53%	49%	10	11	14
Colombard	0	10	10	0	100%		0	1	0
Muscadelle	0	18	18	18	100%	102%	0	1	1
Muscat Blanc	11	13	24	33	54%	72%	1	3	3
Other white	3	0	3	3	0%	110%	1	0	1
Pedro Ximenes	0	12	12	10	100%	123%	0	1	1
Pinot Gris	10	9	19	57	49%	33%	2	1	2
Riesling	972	840	1812	2764	46%	66%	7	15	15
Sauvignon Blanc	211	65	275	501	23%	55%	4	4	5
Semillon	63	289	352	267	82%	132%	3	6	5
Traminer	34	49	83	110	59%	76%	4	4	7
Viognier	14	55	68	110	80%	62%	1	1	2
<b>Total WHITE</b>	<b>1953</b>	<b>2066</b>	<b>4020</b>	<b>6617</b>	<b>51%</b>	<b>61%</b>			
<b>Grand Total (red and white)</b>	<b>3776</b>	<b>4623</b>	<b>8398</b>	<b>9765</b>					

## EDEN VALLEY PRICE AND BAUME DATA - VINTAGE 2002

Table 7.2

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				
<b>RED</b>										
Cabernet Franc	8	24	14.6	100%	\$13,504	\$37,632			\$1,600	100%
Cabernet Sauvignon	700	1,500	13.3	99%	\$1,264,269	\$2,708,713	\$1,395	\$5,730	\$1,806	100%
Grenache	58	89	13.3	66%	\$55,234	\$84,698	\$765	\$1,000	\$947	100%
Mataro	18	18	13.5	100%	\$20,633	\$20,633			\$1,117	100%
Merlot	72	217	14.3	94%	\$138,392	\$415,426	\$1,500	\$2,400	\$1,915	100%
Muscat Brown	2	2			\$1,400	\$1,400			\$700	100%
Pinot Noir	178	335	11.4	97%	\$223,312	\$420,136	\$500	\$2,300	\$1,254	100%
Sangiovese	5	6	13.9	100%	\$7,163	\$8,454			\$1,450	100%
Shiraz	1,514	2,158	13.9	93%	\$3,071,370	\$4,379,471	\$1,050	\$5,730	\$2,029	100%
<b>Total RED</b>	<b>2,556</b>	<b>4,349</b>			<b>\$4,795,277</b>	<b>\$8,076,564</b>				
<b>WHITE</b>										
Chardonnay	706	1,342	13.0	92%	\$963,386	\$1,830,439	\$1,100	\$2,300	\$1,364	100%
Colombard	10	10	11.9	100%	\$6,708	\$6,708			\$651	100%
Muscadelle	18	18	13.8	100%	\$13,248	\$13,248			\$720	100%
Muscat Blanc	13	24	11.1	53%	\$7,948	\$14,781			\$626	85%
Pedro Ximenes	12	12	16.7	100%	\$6,150	\$6,150			\$500	100%
Pinot Gris	9	19	13.7	100%	\$16,038	\$32,665			\$1,736	100%
Riesling	840	1,812	12.3	84%	\$1,275,669	\$2,751,566	\$950	\$2,000	\$1,519	100%
Sauvignon Blanc	65	275	11.4	100%	\$75,297	\$320,431	\$850	\$1,300	\$1,163	100%
Semillon	289	352	11.7	92%	\$319,374	\$389,159	\$700	\$1,707	\$1,105	100%
Traminer	49	83	12.5	92%	\$57,129	\$97,297	\$950	\$1,200	\$1,167	100%
Viognier	55	68	14.2	100%	\$123,713	\$155,390			\$2,269	100%
<b>Total WHITE</b>	<b>2,066</b>	<b>4,017</b>			<b>\$2,864,660</b>	<b>\$5,617,834</b>				

(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.

## EDEN VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2003 TO 2007

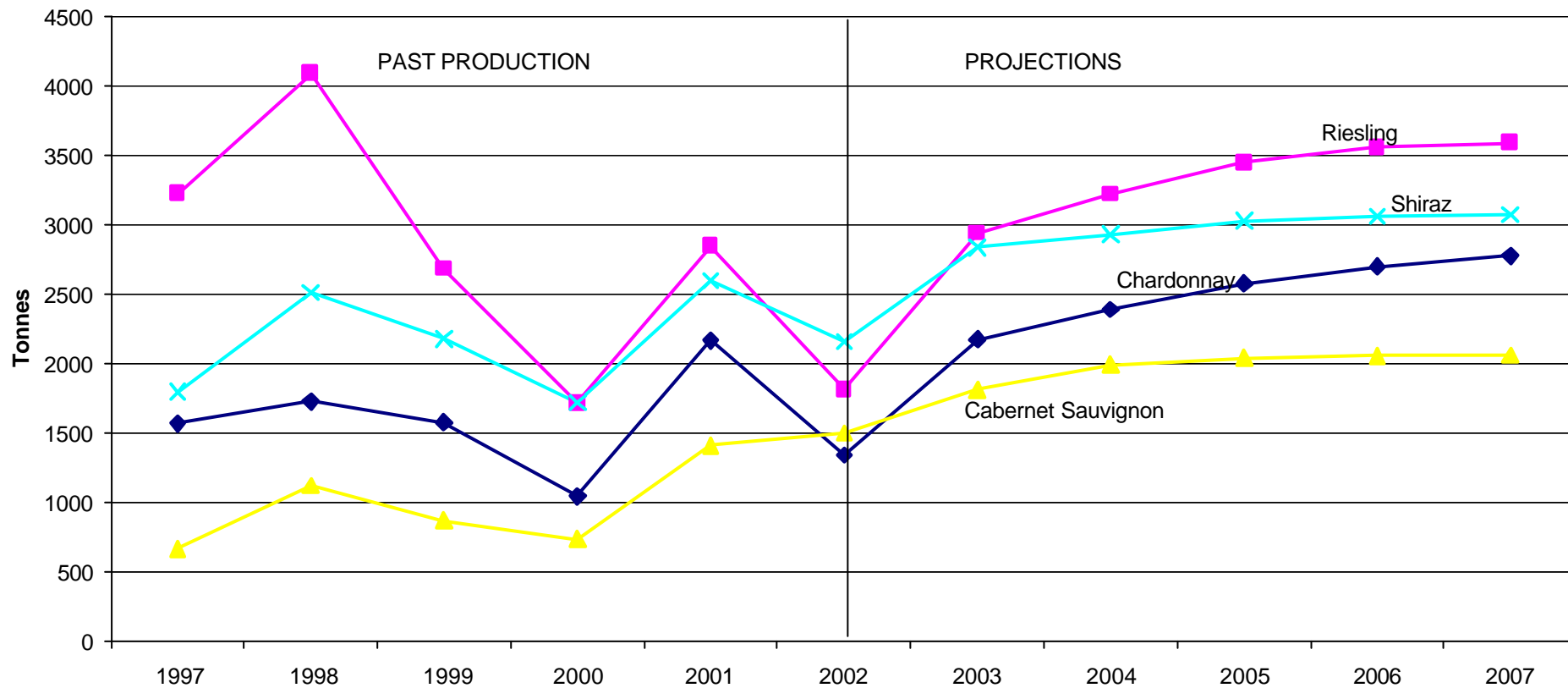
Table 7.3

Variety	2003		2004		2005		2006		2007	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
<b>RED</b>										
Cabernet Franc	22	19	22	19	22	19	22	19	22	19
Cabernet Sauvignon	1815	797	1993	889	2040	931	2055	946	2059	959
Grenache	73	27	73	27	61	15	61	15	61	15
Mataro	46	46	61	61	61	61	61	61	61	61
Merlot	356	256	453	338	582	433	611	462	617	468
Meunier	26	6	26	6	26	6	26	6	26	6
Nebbiolo	0	5	2	5	5	5	5	5	5	5
Pinot Noir	525	539	550	603	568	647	572	690	573	691
Sangiovese	6	6	6	6	6	6	6	6	6	6
Shiraz	2834	1858	2930	1918	3024	1968	3058	1998	3068	2000
Tempranillo	0	10	5	10	10	10	10	10	10	10
Zinfandel	5	5	5	5	5	5	5	5	5	5
<b>Total for RED</b>	<b>5708</b>	<b>3574</b>	<b>6125</b>	<b>3887</b>	<b>6410</b>	<b>4106</b>	<b>6492</b>	<b>4223</b>	<b>6513</b>	<b>4245</b>
<b>WHITE</b>										
Chardonnay	2172	3722	2391	4017	2578	4357	2700	4634	2777	4883
Colombard	10	0	10	0	0	0	0	0	0	0
Muscadelle	25	25	25	25	25	25	25	25	25	25
Muscat Blanc	36	22	36	22	36	22	36	22	36	22
Other white	2	0	2	0	2	0	2	0	2	0
Pedro Ximenes	10	10	10	10	10	10	15	15	15	15
Pinot Gris	46	107	48	107	43	112	48	122	48	132
Riesling	2937	3413	3220	3799	3447	4074	3554	4385	3588	4557
Sauvignon Blanc	312	432	345	473	386	561	386	598	386	612
Semillon	366	247	366	267	363	267	363	297	363	297
Traminer	230	140	225	136	231	143	237	151	237	153
Viognier	173	214	225	247	253	253	269	267	274	267
<b>Total for WHITE</b>	<b>6319</b>	<b>8332</b>	<b>6902</b>	<b>9103</b>	<b>7373</b>	<b>9824</b>	<b>7635</b>	<b>10515</b>	<b>7751</b>	<b>10962</b>

# EDEN VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1997 - 2007

Figure 7.1

Past production and projections (major varieties)



## EDEN VALLEY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 7.4

Variety	Year planted - area in hectares					Total	% planted in 2001
	Pre-98	1998	1999	2000	2001		
<b>RED WINEGRAPES</b>							
CABERNET SAUVIGNON	167	60	5	6	21	259	8%
GRENACHE	22	1	-	-	0	23	0%
MATARO	1	-	6	-	1	7	7%
MERLOT	45	15	10	4	3	75	4%
PINOT NOIR	64	3	2	-	-	69	0%
SHIRAZ	322	95	30	8	12	466	2%
OTHER RED	18	4	2	0	0	24	1%
<b>TOTAL RED WINEGRAPES</b>	<b>638</b>	<b>176</b>	<b>54</b>	<b>17</b>	<b>37</b>	<b>924</b>	<b>4%</b>
<b>WHITE WINEGRAPES</b>							
CHARDONNAY	181	2	6	2	6	197	3%
PINOT GRIS	2	4	3		2	10	18%
RIESLING	332	10	6	16	30	394	8%
SAUVIGNON BLANC	25	-	-	2	-	26	0%
SEMILLON	42	0	0	0	1	43	2%
TRAMINER	27	-	-	-	0	27	1%
VIOGNIER	3	2	2	5	3	15	19%
OTHER WHITE	13	0	0	0	0	13	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>624</b>	<b>18</b>	<b>17</b>	<b>24</b>	<b>42</b>	<b>726</b>	<b>6%</b>
<b>TOTAL ALL VARIETIES</b>	<b>1263</b>	<b>194</b>	<b>72</b>	<b>42</b>	<b>79</b>	<b>1650</b>	<b>5%</b>