

Padthaway

PADTHAWAY VINTAGE OVERVIEW

Vintage Report

The season began with a mild winter followed by warm weather in September, which gave good early growth. Budburst was uneven with many unfruitful shoots. The period from October to December was cool and wet and while saving on irrigation the weather was not kind for flowering and set.

No frosts of any consequence were experienced during spring. The weather fined up in January but remained some 4-5 degrees cooler than average until March.

There were no disease problems due to the abundance of wind during the wet periods and the lack of rain late in the season. The poor set and large number of unfruitful shoots gave lower yields with the district average probably down 40% on last year.

Quality however has been excellent due to low yields and a cool summer and we should see some very good wines from Padthaway this season.

Harvest was a little late but completed in fine weather with few hold-ups.

Ian Ward

Overview of vintage statistics

Padthaway produced 21,043 tonnes this year, a drastic 42% down on last year's production, and 6,000 tonnes less than the Clare Valley produced. Despite this, the winemakers were reasonably happy with the quantities: there was only a 25% shortfall in red varieties and around 3% in white varieties.

As has been found in many regions this year, the weighted average weighbridge price (WAWP) for Cabernet Sauvignon fell (by nearly \$200 per tonne) compared with 2001; on the other hand, Chardonnay was up by \$100 per tonne. Shiraz fell by \$50 per tonne.

The forecast is for a dramatic jump in production to 30,000 tonnes in 2003, followed by further small increases in red and white production until 2007. While white varieties are generally in balance, there is expected to be a 3,000 tonne surplus in red varieties in each of the forecast years.

As in the Adelaide Hills, Chardonnay is the major variety for the region. However, production of red varieties still exceeds that of white varieties overall.

There was only a 3% increase in plantings in the region in the 2001 planting season, consistent with the small forecast production growth. Almost all new plantings were in Shiraz and Chardonnay.

PADTHAWAY WINE REGION



PADTHAWAY TONNES CRUSHED BY VARIETY - VINTAGE 2002

Table 12.1

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	237	0	237	177	0%	134%	3	0	2
Cabernet Sauvignon	1785	2407	4192	5564	57%	75%	7	14	15
Malbec	102	43	145	273	30%	53%	4	1	4
Merlot	923	108	1031	1272	11%	81%	5	4	5
Petit Verdot	25	0	25	15	0%	167%	3	0	2
Pinot Noir	829	32	861	1508	4%	57%	4	2	5
Ruby Cabernet	1	0	1	1	0%	147%	1	0	1
Sangiovese	0	23	23	23	100%	99%	0	1	1
Shiraz	2558	2168	4727	5288	46%	89%	7	10	11
Total RED	6460	4781	11241	14121	43%	80%			
WHITE									
Chardonnay	4927	1455	6383	6669	23%	96%	6	12	14
Muscadelle	11	0	11	0	0%		1	0	0
Muscat Blanc	57	0	57	57	0%	101%	1	0	1
Other white	1	0	1	1	0%	70%	1	0	1
Riesling	1883	218	2101	1731	10%	121%	4	2	3
Sauvignon Blanc	329	32	361	508	9%	71%	4	2	6
Semillon	489	21	510	583	4%	87%	2	1	2
Traminer	140	0	140	234	0%	60%	2	0	2
Verdelho	196	0	196	324	0%	61%	3	0	3
Viognier	37	4	42	42	10%	99%	1	1	1
Total WHITE	8071	1731	9801	10149	18%	97%			
Grand Total (red and white)	14531	6512	21043	24270					

PADTHAWAY PRICE AND BAUME DATA - VINTAGE 2002

Table 12.2

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 Sauvignon	2,407	4,192	13.7	83%	\$3,755,324	\$6,541,208	\$960	\$1,800	\$1,560	100%
Malbec	43	145	13.0	100%	\$63,532	\$214,133			\$1,472	100%
Merlot	108	1,031	13.6	100%	\$183,728	\$1,749,103	\$1,585	\$1,800	\$1,697	100%
Pinot Noir	32	861	10.4	100%	\$45,651	\$1,233,193			\$1,433	100%
Sangiovese	23	23	15.0	100%	\$38,084	\$38,084			\$1,675	100%
Shiraz	2,168	4,727	14.3	77%	\$3,748,042	\$8,169,622	\$1,050	\$2,040	\$1,728	100%
Total RED	4,781	10,978			\$7,834,361	\$17,945,344				
WHITE										
Chardonnay	1,455	6,383	13.0	90%	\$2,200,081	\$9,649,106	\$1,103	\$1,675	\$1,512	100%
Riesling	218	2,101	11.8	100%	\$282,302	\$2,719,101			\$1,294	100%
Sauvignon Blanc	32	361	12.3	100%	\$45,094	\$505,554			\$1,400	100%
Semillon	21	510	12.4	100%	\$11,407	\$280,379			\$550	100%
Viognier	4	42	13.0	100%	\$7,034	\$69,704			\$1,675	100%
Total WHITE	1,731	9,396			\$2,545,918	\$13,223,845				

(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.

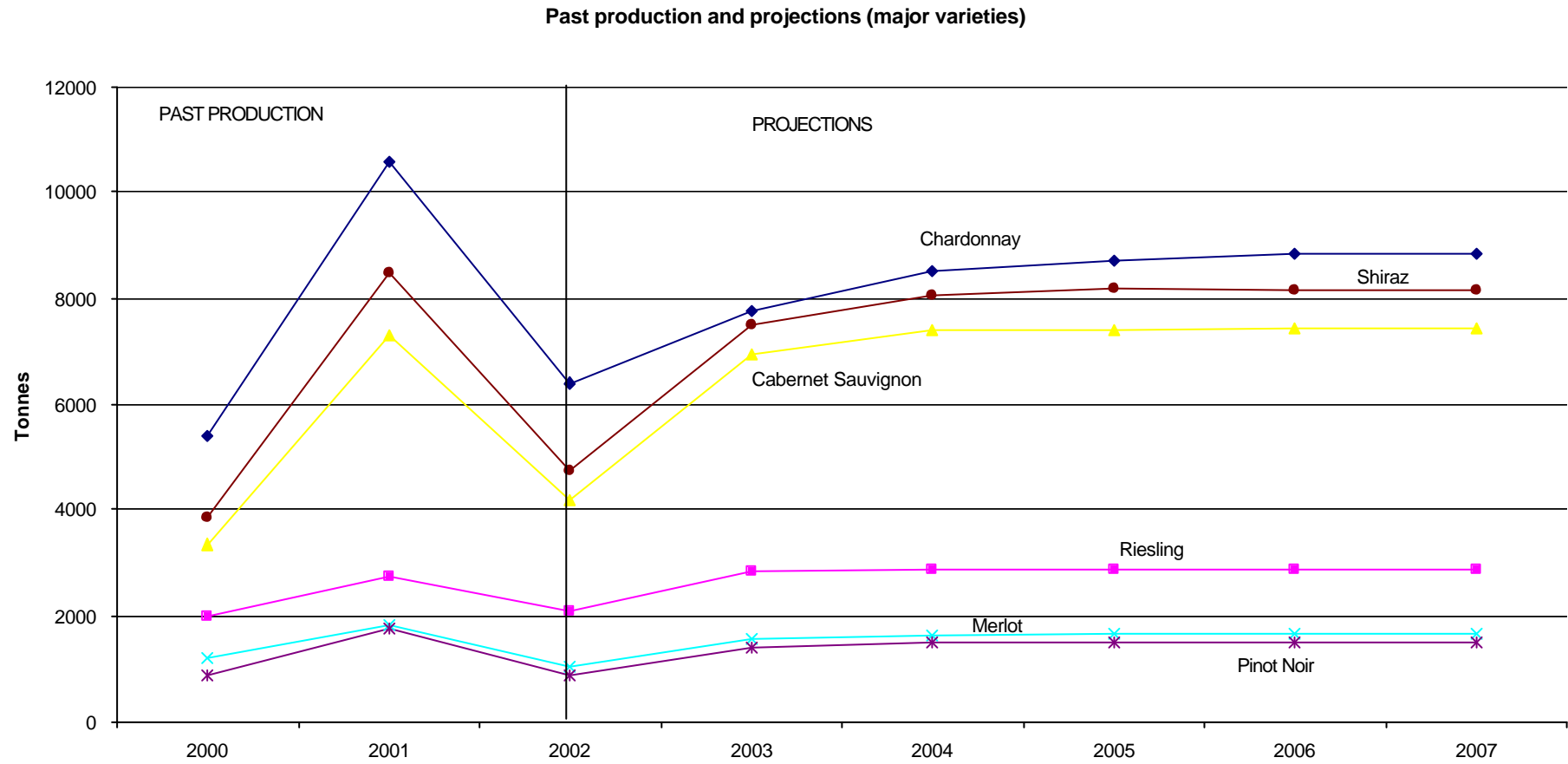
PADTHAWAY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2003 TO 2007

Table 12.3

Variety	2003		2004		2005		2006		2007	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Franc	274	196	203	125	203	125	203	125	203	125
Cabernet Sauvignon	6922	5741	7398	5964	7377	6114	7418	6219	7423	6219
Malbec	312	272	312	272	312	272	312	272	312	272
Merlot	1550	1046	1627	1046	1665	1046	1666	1046	1666	1046
Petit Verdot	42	0	57	0	57	0	57	0	57	0
Pinot Noir	1400	1654	1480	1721	1480	1775	1480	1821	1480	1832
Ruby Cabernet	3	3	3	3	3	3	3	3	3	3
Sangiovese	12	12	25	25	49	49	49	49	49	49
Shiraz	7489	6493	8056	7139	8174	7237	8155	7247	8155	7247
Total for RED	18005	15417	19161	16295	19321	16621	19344	16782	19349	16793
WHITE										
Chardonnay	7754	7741	8505	8375	8715	8551	8844	8742	8854	8816
Muscadelle	12	0	12	0	12	0	12	0	12	0
Muscat Blanc	0	0	0	0	0	0	0	0	0	0
Other white	1	0	1	0	1	0	1	0	1	0
Riesling	2839	2799	2888	2904	2888	3004	2893	3109	2898	3114
Sauvignon Blanc	496	792	501	824	501	862	531	901	581	907
Semillon	587	77	786	80	786	79	736	81	736	81
Traminer	366	359	419	419	419	419	419	419	419	419
Verdelho	284	67	282	72	282	72	282	72	282	72
Viognier	43	42	71	70	110	111	141	141	141	141
Total for WHITE	12383	11877	13465	12744	13714	13098	13860	13465	13925	13550

PADTHAWAY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 2000 - 2007

Figure 12.1



PADTHAWAY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 12.4

Variety	Year planted - area in hectares					Total	% planted in 2001
	Pre-98	1998	1999	2000	2001		
RED WINEGRAPES							
CABERNET FRANC	24	-	-	-	-	24	0%
CABERNET SAUVIGNON	541	75	74	72	9	771	1%
MALBEC	37	-	-	-	-	37	0%
MERLOT	146	17	8	-	-	170	0%
PINOT NOIR	111	-	-	-	-	111	0%
SHIRAZ	598	85	59	64	53	859	6%
OTHER RED	8	0	1	6	0	16	0%
TOTAL RED WINEGRAPES	1464	177	142	143	62	1987	3%
WHITE WINEGRAPES							
CHARDONNAY	726	-	-	18	24	767	3%
MUSCADELLE	17	-	-	-	-	17	0%
MUSCAT BLANC	16	-	-	-	-	16	0%
RIESLING	314	-	-	-	-	314	0%
SAUVIGNON BLANC	49	-	2	-	-	51	0%
SEMILLON	89	-	-	-	-	89	0%
TRAMINER	66	-	-	-	-	66	0%
VERDELHO	32	-	2	-	-	34	0%
VIIGNIER	4	-	-	4	-	8	0%
TOTAL WHITE WINEGRAPES	1314	0	4	22	24	1364	2%
TOTAL ALL VARIETIES	2778	177	146	164	86	3351	3%