

# Riverland

## RIVERLAND VINTAGE OVERVIEW

### Vintage Report

If any year can be described as perfect, 2002 would have been it weatherwise. A good long cool period with no heat shocks for ripening led to large crops with exceptional quality. Due to the cool weather there was some powdery mildew pressure but this was generally controlled by growers.

Due to the larger crops there was some delay in processing and this led to some higher than preferred baumé levels.

### Overview of vintage statistics

The Riverland produced 433,893 tonnes this year – a 100,000+ tonne increase on the previous vintage, and more than the whole of South Australia produced in 1997 and before. The *increase* is the equivalent of almost twice the annual crop of the next largest regions in the state – the Barossa Valley and McLaren Vale.

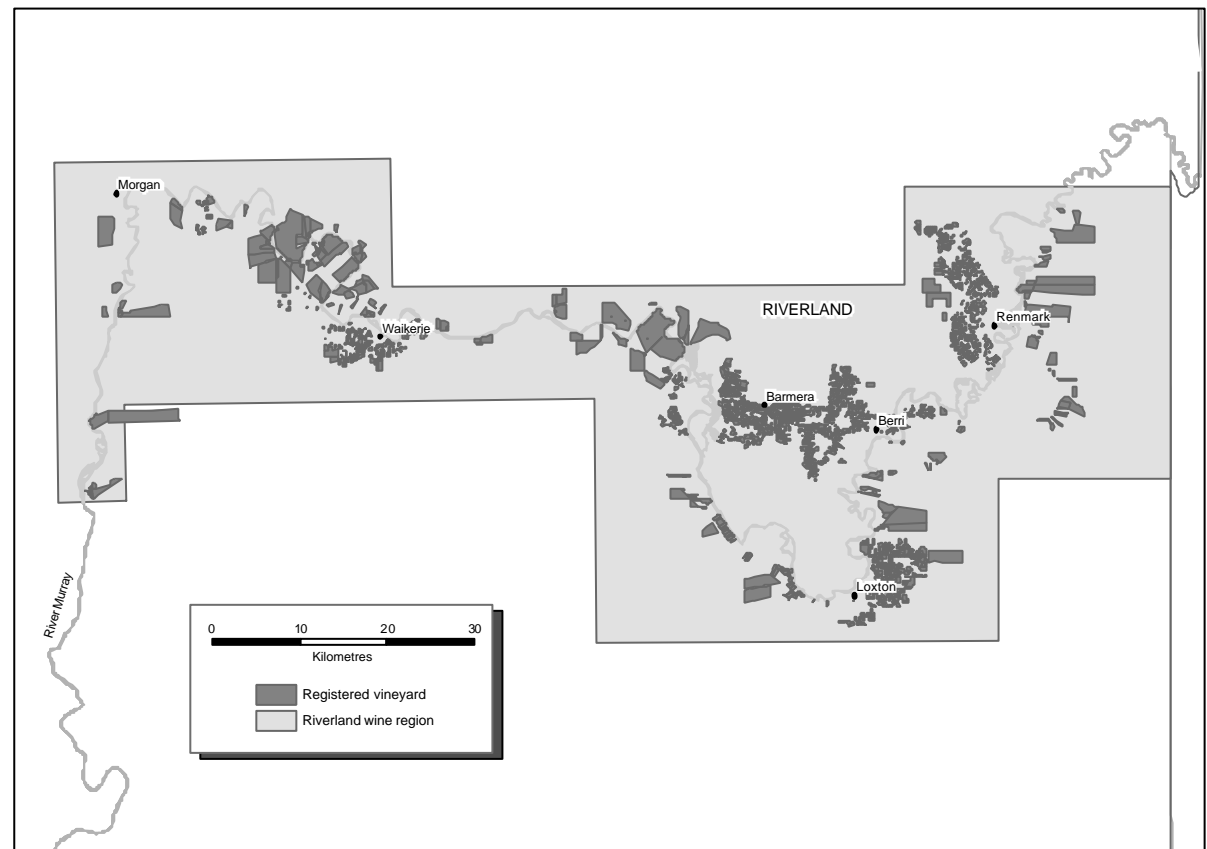
Not surprisingly, there was a slight surplus of red grapes, particularly Cabernet Sauvignon, Merlot and Ruby Cabernet. Supply and demand were almost perfectly in balance for white varieties overall.

Movement in weighted average weighbridge prices (WAWP) was mixed. Cabernet Sauvignon, Shiraz and Chardonnay were all up by around \$50 compared with 2001, while Merlot (\$120 lower), Petit Verdot (\$220 lower) and Ruby Cabernet (\$140 lower) were all down.

The forecast for the Riverland is for very strong growth over the next five years – even from the starting point of the “bumper crop” of 2002. Reds are estimated to grow by another 20,000 tonnes (7%) in the next five years, and whites by 35,000 tonnes (20%). This increase is more than the size of the next largest producing regions in the state. Interestingly, winemakers have revised their projections upwards since last year’s survey, with the demand figure for 2006 now being 40,000 tonnes higher than it was when last year’s survey was published. There is expected to be a small surplus of red grapes in each of the five years, and a shortfall of white grapes. While Shiraz, Cabernet Sauvignon and Chardonnay are by far the largest varieties, Colombarid is emerging rapidly – increasing by 33% over the five years, and overtaking Merlot as the fourth largest variety by volume.

The Riverland is one of only two regions (the other being the Adelaide Hills) where new plantings of white varieties exceeded reds – in this case by nearly double. 72% of the white plantings was Chardonnay, while in the reds, plantings of Merlot, Petit Verdot and Shiraz were all significantly higher than Cabernet Sauvignon.

Despite the very high yielding vintage, the estimate of the hectares required to meet the grape requirement in 2007 indicates that a further 5,000 hectares will need to be planted by 2004 to meet the demand, which will be for nearly half a million grapes from the South Australian Riverland.



## RIVERLAND CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 13.1

Variety	Year planted - area in hectares					Total	% planted in 2001
	Pre-98	1998	1999	2000	2001		
<b>RED WINEGRAPES</b>							
CABERNET SAUVIGNON	2141	769	313	125	43	3391	1%
DURIF	0	-	1	13	1	15	7%
GRENACHE	496	57	47	9	7	615	1%
MALBEC	63	2	0	1	0	66	1%
MATARO	327	55	27	9	7	425	2%
MERLOT	551	279	93	44	80	1048	8%
PETIT VERDOT	79	122	207	80	66	555	12%
PINOT NOIR	35	14	35	48	17	149	11%
RUBY CABERNET	423	178	216	33	16	865	2%
SANGIOVESE	13	11	3	6	1	34	2%
SHIRAZ	3335	628	299	91	78	4431	2%
TEMPRANILLO	0	3	0	-	10	14	74%
OTHER RED	89	11	3	2	1	105	1%
<b>TOTAL RED WINEGRAPES</b>	<b>7552</b>	<b>2130</b>	<b>1245</b>	<b>460</b>	<b>327</b>	<b>11712</b>	<b>3%</b>
<b>WHITE WINEGRAPES</b>							
CHARDONNAY	2119	48	34	74	392	2667	15%
CHENIN BLANC	196	4	1	-	-	201	0%
COLOMBARD	404	68	122	88	62	744	8%
DORADILLO	202	-	-	-	1	203	1%
MUSCAT BLANC	65	-	-	1	3	69	5%
MUSCAT GORDO BLANCO	1182	12	3	4	9	1210	1%
PALOMINO	53	-	-	-	-	53	0%
RIESLING	248	-	-	3	-	251	0%
SAUVIGNON BLANC	129	-	-	-	8	138	6%
SEMILLON	314	13	12	12	-	350	0%
SULTANA	641	5	3	5	5	659	1%
TRAMINER	61	-	0	-	35	97	36%
TREBBIANO	66	-	-	-	-	66	0%
VERDELHO	74	27	5	4	7	118	6%
VIOGNIER	5	2	8	19	15	48	30%
OTHER WHITE	186	3	2	0	5	196	2%
<b>TOTAL WHITE WINEGRAPES</b>	<b>5945</b>	<b>183</b>	<b>190</b>	<b>209</b>	<b>543</b>	<b>7071</b>	<b>8%</b>
<b>OTHER VARIETIES</b>							
MULTIPURPOSE	178	3	4	2	1	188	0%
TABLE GRAPES	69	3	0	0	0	72	0%
ROOTSTOCK BLOCK	41	-	3	-	-	44	0%
<b>TOTAL ALL VARIETIES</b>	<b>13784</b>	<b>2319</b>	<b>1442</b>	<b>671</b>	<b>870</b>	<b>19086</b>	<b>5%</b>

## RIVERLAND TONNES CRUSHED BY VARIETY (RED) - VINTAGE 2002

Table 13.2

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
Barbera	0	21	21	20	100%	103%	0	1	1
Cabernet Franc	0	186	186	165	100%	112%	0	4	4
Cabernet Sauvignon	10024	68219	78243	60737	87%	129%	12	25	29
Carignan	286	31	317	281	10%	113%	1	1	2
Carina	0	153	153	90	100%	170%	0	2	1
Chambourcin	0	163	163	163	100%	100%	0	2	2
Durif	0	30	30	28	100%	108%	0	2	2
Grenache	822	11890	12712	9038	94%	141%	7	16	18
Malbec	531	503	1034	1001	49%	103%	5	5	7
Mataro	120	8041	8160	7539	99%	108%	2	12	12
Merlot	2494	23051	25545	20899	90%	122%	8	18	19
Muscat Brown	0	43	43	43	100%	101%	0	1	1
Nebbiolo	0	19	19	21	100%	89%	0	2	2
Other red	56	184	240	180	77%	133%	2	3	2
Petit Verdot	1075	8964	10038	7251	89%	138%	5	20	18
Pinot Noir	170	2143	2313	1861	93%	124%	1	7	7
Rubired	47	198	245	233	81%	105%	2	3	4
Ruby Cabernet	2214	18950	21163	15468	90%	137%	8	14	16
Saint Macaire	0	73	73	0	100%		0	1	0
Sangiovese	329	914	1243	461	74%	270%	3	5	5
Shiraz	13173	91959	105131	90459	87%	116%	12	28	29
Tarrango	0	846	846	1099	100%	77%	0	2	2
Tempranillo	26	110	136	128	81%	106%	1	3	4
Tinta Cao	27	0	27	27	0%	99%	1	0	1
Tinta Molle	16	0	16	16	0%	100%	1	0	1
Touriga	145	90	235	241	38%	97%	2	2	3
Zante Currant	0	0	0	10		0%	0	0	1
<b>Total RED</b>	<b>31552</b>	<b>236781</b>	<b>268333</b>	<b>217460</b>	<b>88%</b>	<b>123%</b>			

## RIVERLAND TONNES CRUSHED BY VARIETY (WHITE) - VINTAGE 2002

Table 13.3

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
Biancone	809	270	1079	703	25%	154%	1	5	5
Canada Muscat	0	210	210	227	100%	92%	0	2	2
Chardonnay	8765	55233	63998	62225	86%	103%	9	22	23
Chenin Blanc	708	5699	6407	5824	89%	110%	4	10	10
Colombard	1060	22385	23445	22691	95%	103%	5	14	15
Crouchen	74	110	184	173	60%	106%	1	3	1
Doradillo	1733	2223	3956	3301	56%	120%	3	5	4
Emerald Riesling	0	72	72	72	100%	100%	0	1	1
Italia	0	14	14	14	100%	98%	0	1	1
Marsanne	0	6	6	10	100%	60%	0	2	1
Merbein Seedless	0	38	38	0	100%		0	1	0
Muscadelle	0	410	410	352	100%	117%	0	5	5
Muscat Blanc	736	583	1319	1129	44%	117%	2	4	4
Muscat Gordo Blanco	634	26182	26815	26052	98%	103%	4	10	10
Orange Muscat	10	0	10	10	0%	100%	1	0	1
Other white	9	75	84	71	90%	118%	1	3	3
Palomino	317	409	726	697	56%	104%	1	6	4
Pedro Ximenes	0	240	240	164	100%	147%	0	4	2
Riesling	879	3421	4300	4656	80%	92%	5	8	9
Sauvignon Blanc	1713	2221	3934	4060	56%	97%	4	7	8
Semillon	4557	7489	12046	11189	62%	108%	5	12	12
Sultana	53	10079	10132	10434	99%	97%	1	11	11
Sylvaner	529	482	1011	902	48%	112%	1	2	3
Taminga	32	323	355	329	91%	108%	1	5	5
Traminer	335	620	956	1109	65%	86%	2	4	5
Trebbiano	203	330	532	459	62%	116%	2	6	5
Unsound / distillation white	0	28	28	0	100%		0	1	0
Verdelho	66	2841	2907	3845	98%	76%	2	10	10
Viognier	196	110	306	314	36%	98%	1	2	2
Waltham Cross	0	40	40	0	100%		0	1	0
<b>Total WHITE</b>	<b>23417</b>	<b>142142</b>	<b>165560</b>	<b>161012</b>	<b>86%</b>	<b>103%</b>			
<b>Grand Total (red and white)</b>	<b>54970</b>	<b>378923</b>	<b>433893</b>	<b>378472</b>					

## RIVERLAND PRICE AND BAUME DATA (RED) - VINTAGE 2002

Table 13.4

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)	
<b>RED</b>										
Barbera	21	21	9.5	100%	\$7,200	\$7,200			\$350	100%
Cabernet Franc	186	186	12.8	100%	\$101,437	\$101,437	\$400	\$600	\$547	100%
Cabernet Sauvignon	68,219	78,243	14.2	98%	\$54,765,047	\$62,812,284	\$230	\$1,100	\$803	100%
Carignan	31	317	10.4	100%	\$11,721	\$118,685			\$374	100%
Carina	153	153	12.2	100%	\$41,156	\$41,156			\$269	100%
Chambourcin	163	163	13.4	100%	\$78,877	\$78,877			\$483	100%
Durif	30	30	13.7	100%	\$12,106	\$12,106			\$402	100%
Grenache	11,890	12,712	12.0	99%	\$6,614,028	\$7,071,099	\$100	\$1,600	\$556	100%
Malbec	503	1,034	13.1	100%	\$259,393	\$532,812	\$315	\$644	\$515	100%
Mataro	8,041	8,160	13.6	100%	\$4,664,139	\$4,733,491	\$190	\$975	\$580	100%
Merlot	23,051	25,545	13.7	99%	\$14,936,184	\$16,552,333	\$230	\$1,109	\$648	100%
Muscat Brown	43	43	15.5	100%	\$27,780	\$27,780			\$640	100%
Nebbiolo	19	19	13.5	100%	\$7,100	\$7,100			\$380	100%
Other red	184	240			\$130,029	\$169,557			\$707	100%
Petit Verdot	8,964	10,038	13.5	99%	\$4,680,584	\$5,241,659	\$290	\$800	\$522	100%
Pinot Noir	2,143	2,313	10.7	100%	\$1,375,671	\$1,484,782	\$450	\$654	\$642	100%
Rubired	198	245	12.7	49%	\$63,171	\$78,070	\$255	\$464	\$318	100%
Ruby Cabernet	18,950	21,163	14.0	99%	\$11,074,206	\$12,367,987	\$245	\$955	\$584	100%
Saint Macaire	73	73	13.2	100%	\$44,037	\$44,037			\$606	100%
Sangiovese	914	1,243	10.3	100%	\$506,563	\$688,623	\$257	\$800	\$554	100%
Shiraz	91,959	105,131	14.0	97%	\$80,540,031	\$92,077,198	\$230	\$1,200	\$876	100%
Tarrango	846	846	11.6	100%	\$273,865	\$273,865			\$324	100%
Tempranillo	110	136	13.3	100%	\$48,171	\$59,561	\$375	\$524	\$439	100%
Touriga	90	235	13.8	100%	\$60,198	\$157,157			\$669	100%
<b>Total RED</b>	<b>236,781</b>	<b>268,291</b>			<b>\$180,322,694</b>	<b>\$204,738,855</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.

## RIVERLAND PRICE AND BAUME DATA (WHITE) - VINTAGE 2002

Table 13.5

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)	
Biancone	270	1,079	11.6	100%	\$68,255	\$272,504	\$220	\$265	\$252	100%
Canada Muscat	210	210	8.5	100%	\$103,320	\$103,320			\$493	100%
Chardonnay	55,233	63,998	13.2	99%	\$41,563,543	\$48,159,264	\$230	\$930	\$753	100%
Chenin Blanc	5,699	6,407	11.6	100%	\$2,064,403	\$2,320,995	\$300	\$525	\$362	100%
Colombard	22,385	23,445	12.1	100%	\$8,819,049	\$9,236,613	\$275	\$561	\$394	100%
Crouchen	110	184	12.5	100%	\$33,900	\$56,932	\$260	\$359	\$309	100%
Doradillo	2,223	3,956	11.0	100%	\$590,559	\$1,050,900	\$170	\$350	\$266	100%
Emerald Riesling	72	72	13.3	100%	\$23,629	\$23,629			\$329	100%
Italia	14	14	14.0	100%	\$5,767	\$5,767			\$419	100%
Marsanne	6	6	11.8	100%	\$2,247	\$2,247			\$372	100%
Merbein Seedless	38	38	9.7	100%	\$11,430	\$11,430			\$300	100%
Muscadelle	410	410	13.0	100%	\$174,642	\$174,642	\$300	\$666	\$426	100%
Muscat Blanc	583	1,319	12.1	100%	\$218,992	\$495,647	\$295	\$650	\$376	100%
Muscat Gordo Blanco	26,182	26,815	13.2	100%	\$9,589,298	\$9,821,336	\$280	\$543	\$366	100%
Other white	75	84			\$30,745	\$34,214			\$408	100%
Palomino	409	726	11.7	100%	\$107,015	\$190,058	\$230	\$350	\$262	100%
Pedro Ximenes	240	240	11.9	100%	\$66,470	\$66,470	\$230	\$350	\$276	100%
Riesling	3,421	4,300	11.6	100%	\$1,778,376	\$2,235,291	\$375	\$660	\$520	100%
Sauvignon Blanc	2,221	3,934	10.8	100%	\$1,037,278	\$1,837,092	\$230	\$550	\$467	100%
Semillon	7,489	12,046	11.7	100%	\$3,588,819	\$5,772,326	\$230	\$1,500	\$479	100%
Sultana	10,079	10,132	10.7	99%	\$3,053,489	\$3,069,545	\$200	\$330	\$303	100%
Sylvaner	482	1,011	12.2	100%	\$158,230	\$331,813			\$328	100%
Taminga	323	355	13.2	100%	\$111,004	\$121,999	\$290	\$439	\$344	100%
Traminer	620	956	12.1	100%	\$339,726	\$523,489	\$514	\$574	\$548	100%
Trebbiano	330	532	13.6	100%	\$92,377	\$149,264	\$220	\$325	\$280	100%
Unsound / distillation white	28	28	14.2	100%	\$9,000	\$9,000			\$321	100%
Verdelho	2,841	2,907	12.4	100%	\$1,243,948	\$1,272,847	\$330	\$1,500	\$438	100%
Viognier	110	306	13.7	100%	\$104,836	\$291,691			\$953	100%
Waltham Cross	40	40	13.1	100%	\$10,000	\$10,000			\$250	100%
<b>Total WHITE</b>	<b>142,142</b>	<b>165,550</b>			<b>\$75,000,347</b>	<b>\$87,650,324</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.

## RIVERLAND ESTIMATED AND PREFERRED FUTURE INTAKE OF RED GRAPES 2003 TO 2007

Table 13.6

Variety	2003		2004		2005		2006		2007	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
Barbera	2	2	2	2	2	2	2	2	2	2
Cabernet Franc	311	281	314	284	314	284	314	284	314	284
Cabernet Sauvignon	73467	58278	77781	63227	81648	77613	82227	79208	81901	79382
Carignan	275	275	275	275	275	275	275	275	275	275
Carina	115	0	25	0	25	0	25	0	25	0
Chambourcin	65	65	65	65	65	65	65	65	65	65
Durif	42	80	59	140	75	150	81	160	81	170
Grenache	12161	11524	12604	11977	12902	12262	13052	12410	13080	12438
Malbec	1053	1123	1060	1130	1041	1111	1043	1101	1045	1103
Mataro	8179	8138	9368	9773	9957	10169	10390	10417	10436	10463
Merlot	25808	26556	28360	29437	30037	30657	31434	31650	31679	31945
Muscat Brown	40	40	40	40	40	40	40	40	40	40
Nebbiolo	17	21	17	21	17	21	18	22	18	22
Other red	234	168	251	175	258	181	232	185	236	189
Petit Verdot	9807	8879	10510	9750	10826	10377	10461	10655	10310	10529
Pinot Noir	3125	3085	4472	4432	5472	5472	5997	5997	6118	6118
Rubired	322	242	322	242	322	242	222	142	222	142
Ruby Cabernet	16198	13358	16152	12670	16179	12936	15900	12352	16107	12003
Saint Macaire	65	0	65	0	65	0	65	0	65	0
Sangiovese	844	63	907	65	880	65	880	65	880	65
Shiraz	101663	89720	105526	110528	107673	113544	112559	115990	112811	116292
Tarrango	712	0	680	0	680	0	680	0	680	0
Tempranillo	147	147	214	207	318	310	412	424	494	486
Tinta Cao	110	109	124	123	129	127	133	131	137	135
Tinta Molle	40	40	40	40	40	40	40	40	40	40
Touriga	222	216	222	216	224	216	224	216	224	216
Zinfandel	1	1	10	10	18	18	26	26	34	34
<b>Total for RED</b>	<b>255025</b>	<b>222411</b>	<b>269465</b>	<b>254829</b>	<b>279482</b>	<b>276177</b>	<b>286797</b>	<b>281857</b>	<b>287319</b>	<b>282438</b>

## RIVERLAND ESTIMATED AND PREFERRED FUTURE INTAKE OF WHITE GRAPES 2003 TO 2007

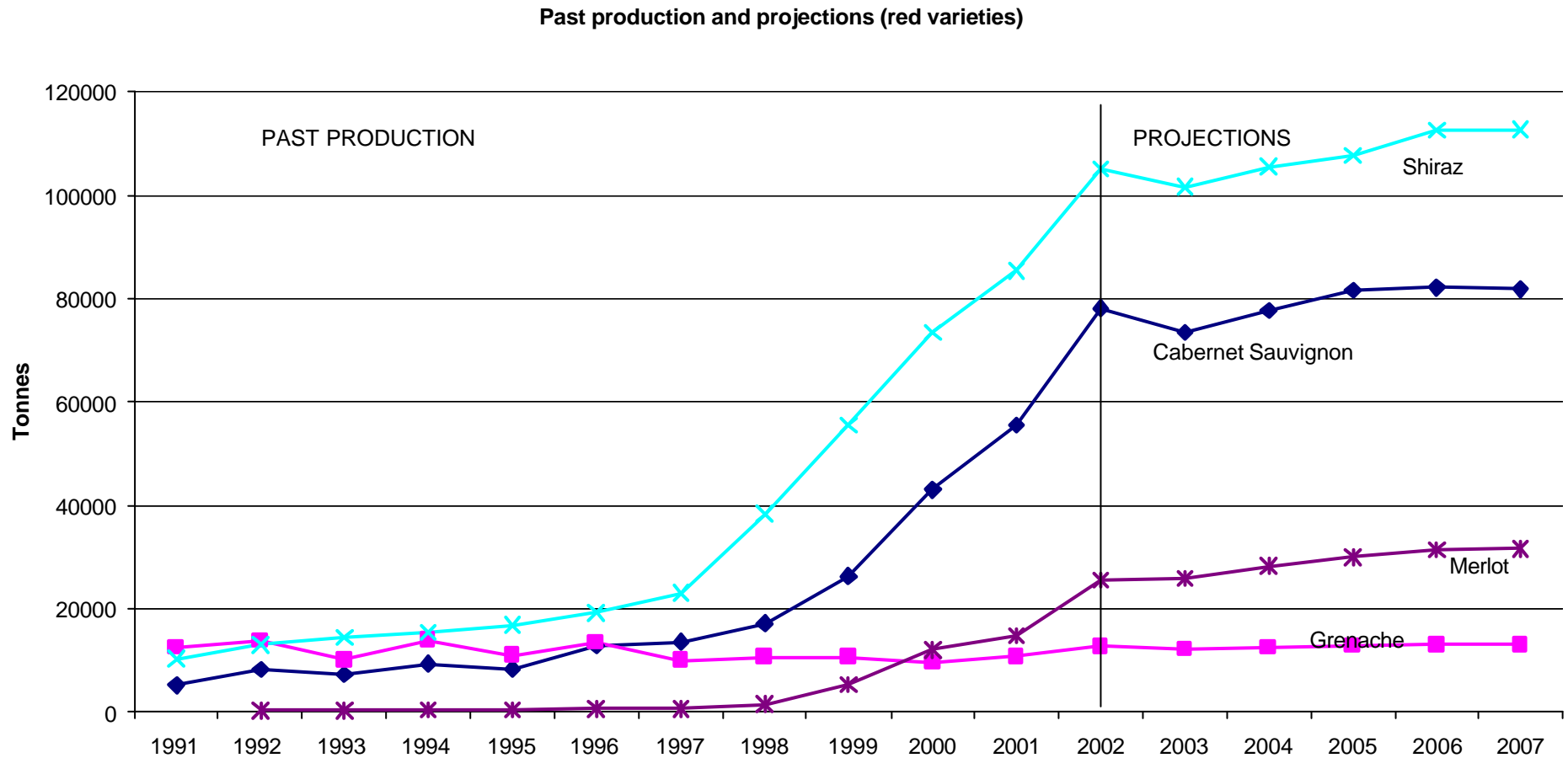
Table 13.7

Variety	2003		2004		2005		2006		2007	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
Biancone	799	590	728	469	719	469	719	419	719	419
Canada Muscat	145	145	145	145	165	165	165	165	165	165
Chardonnay	67155	72855	75079	77934	82910	87217	90624	93247	93171	95738
Chenin Blanc	5593	5351	5622	5292	5581	5249	5579	5197	5582	5200
Colombard	27144	27679	31534	31727	34274	34487	35634	36047	36378	36791
Crouchen	143	138	143	138	121	116	121	116	121	116
Doradillo	2357	2392	2345	2280	2245	2180	2245	2180	1795	2080
Emerald Riesling	40	40	40	40	40	40	40	40	40	40
Italia	29	29	29	29	29	29	29	29	29	29
Marsanne	15	10	25	10	30	10	0	10	0	10
Muscadelle	414	300	436	300	359	223	359	223	359	223
Muscat Blanc	770	1110	919	1170	1242	1283	1419	1395	1514	1495
Muscat Gordo Blanco	25485	26620	24848	26842	24886	26617	24959	26383	25045	26449
Orange Muscat	40	50	50	50	50	50	50	50	50	50
Other white	112	81	129	86	147	87	147	87	147	87
Palomino	756	546	637	537	637	487	627	488	627	488
Pedro Ximenes	301	126	286	111	258	83	168	83	168	83
Riesling	3811	5981	4003	6100	4533	6169	4777	6240	4825	6264
Sauvignon Blanc	3256	4584	3443	4609	3445	4734	3444	4762	3446	4762
Semillon	10462	10833	10690	12168	10727	12159	10730	12525	10728	12542
Sultana	7695	8168	7708	8019	7394	8029	7303	7988	7309	7994
Sylvaner	920	720	920	670	920	670	920	670	920	670
Taminga	266	226	266	226	266	226	266	226	266	226
Traminer	957	1550	1066	1650	1210	1750	1452	2050	1587	2200
Trebbiano	298	259	295	256	295	206	325	206	325	206
Verdelho	3628	3978	3878	4148	3977	4207	4039	4270	4013	4244
Viognier	400	465	662	712	864	894	884	907	884	941
Waltham Cross	40	0	40	0	40	0	40	0	40	0
<b>Total for WHITE</b>	<b>163030</b>	<b>174825</b>	<b>175965</b>	<b>185717</b>	<b>187363</b>	<b>197835</b>	<b>197065</b>	<b>206003</b>	<b>200253</b>	<b>209512</b>



# RIVERLAND PAST PRODUCTION AND PROJECTIONS FOR MAJOR RED VARIETIES 1991 - 2007

Figure 13.1



RIVERLAND PAST PRODUCTION AND PROJECTIONS FOR MAJOR WHITE VARIETIES 1991 - 2007

Figure 13.1

