

Adelaide Hills regional vintage summary

ADELAIDE HILLS VINTAGE OVERVIEW

Vintage report

What a pleasure after last season! Following excellent winter rains, spring was near to perfect for flowering and set for most varieties across the region, resulting in full, clean bunches. As with all regions the weather turned hot for December, January and into February – the majority of the heat striking pre-veraison, with one short burst post-veraison. Disease and pest pressure was negligible. Three inches of rain mid-March interrupted vintage briefly, but caused minimal disruption.

There is still concern regarding younger vines over-cropping, evident this year after such a good set. Overall expected baumés for whites and in particular reds were obtained; acids in whites are perhaps a little low resulting from the last hot spell. Comments from growers indicate that bunch numbers were no higher than last year – if anything lower – but berry numbers and weight and overall bunch weights were much higher leading to the increase in tonnages per hectare.

Overview of vintage statistics

The Adelaide Hills crush was more than double last year's – with reds nearly three times higher. This can be attributed partly to new plantings coming into production, and partly to the excellent set and heavy berry/bunch weights, giving high yields. The large tonnages were somewhat unexpected, and exceeded the preferred figures by 35% overall, with all major varieties being in over-supply.

Despite this, prices were generally within 1% of last year's, irrespective of baumé. On average, reds were down by \$20 per tonne, and whites were up by \$30 per tonne. Riesling was the stand-out, with a 10% increase in weighted average weighbridge price.

The projections show that the over-supply of fruit in this region is likely to continue – with the demand (preferred tonnage) in 2006 being lower than the actual crush in 2001. Chardonnay is the only variety showing a shortfall in 2006. The oversupply of Verdelho is particularly striking. Projected demand in 2006 has been revised downward for all major red varieties since last year's survey. The major varieties over the next five years are expected to be Chardonnay, Pinot Noir and Semillon. This is the only region where Cabernet Sauvignon and Shiraz do not feature in the top three varieties.

There were 500 hectares of new vines planted in 1999 and 2000, which are still to come into production. Given the limited growth forecast for the region, and the projected oversupply of fruit, this may be an issue of concern.

ADELAIDE HILLS TONNES CRUSHED BY VARIETY - VINTAGE 2001

Table 2.1

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	8	68	76	37	89%	206%	2	5	4
Cabernet Sauvignon	171	2104	2274	1504	92%	151%	8	20	25
Gamay	0	5	5	0	100%		0	1	0
Grenache	0	12	12	12	100%	100%	0	1	1
Malbec	9	0	9	9	0%	99%	1	0	1
Mataro (Mouvedre)	0	38	38	38	100%	99%	0	1	1
Merlot	149	1682	1831	1372	92%	133%	8	19	24
Meunier	15	444	459	368	97%	125%	1	4	3
Nebbiolo	11	7	18	24	37%	72%	1	2	3
Other red	4	2	6	4	33%	150%	1	1	1
Petit Verdot	0	30	30	30	100%	101%	0	1	1
Pinot Noir	309	3452	3761	2563	92%	147%	8	17	21
Ruby Cabernet	1	0	1	1	0%	100%	1	0	1
Sangiovese	0	53	53	0	100%		0	1	0
Shiraz	137	1502	1640	1223	92%	134%	6	16	22
Tempranillo	11	1	12	21	6%	56%	1	1	2
Zinfandel	16	0	16	18	0%	93%	1	0	2
Total RED	841	9398	10239	7224	92%	142%			
WHITE									
Chardonnay	1011	3751	4762	3785	79%	126%	11	24	29
Colombard	0	35	35	35	100%	101%	0	1	1
Marsanne	0	1	1	1	100%	146%	0	1	1
Other white	0	43	43	37	100%	115%	0	3	2
Pinot Gris	20	87	108	128	81%	84%	2	7	8
Riesling	118	38	155	82	24%	189%	4	5	7
Roussanne	0	0	0	0	100%	138%	0	1	1
Sauvignon Blanc	545	1736	2280	2096	76%	109%	6	19	21
Semillon	49	1005	1054	485	95%	217%	3	11	13
Verdelho	0	187	187	30	100%	622%	0	3	2
Viognier	2	53	55	119	96%	46%	1	9	8
Total WHITE	1745	6935	8680	6798	80%	128%			
Grand Total	2586	16334	18920	14022					

ADELAIDE HILLS PRICE AND BAUME DATA - VINTAGE 2001

Table 2.2

Variety	weighted average weighbridge		weighted average baumé (1)		lowest	highest	estimated total value	
	price*				price**	price**	purchased grapes	total grapes
RED								
Cabernet Franc	\$1,539	100%	12.1	71%	\$1,500	\$1,615	\$104,725	\$117,454
Cabernet Sauvignon	\$1,745	90%	13.4	81%	\$1,050	\$2,650	\$3,670,157	\$3,968,261
Gamay	\$1,858	100%	12.5	100%			\$9,680	\$9,680
Grenache	\$1,437	100%					\$17,175	\$17,175
Mataro (Mouvedre)	\$546	100%					\$20,642	\$20,642
Merlot	\$1,531	85%	13.6	64%	\$704	\$2,250	\$2,574,934	\$2,802,839
Meunier	\$2,004	100%	10.9	100%	\$1,800	\$2,300	\$889,932	\$919,998
Nebbiolo	\$1,955	100%	13.0	32%			\$12,755	\$34,258
Other red	\$680	100%					\$1,360	\$4,080
Petit Verdot	\$747	100%					\$22,570	\$22,570
Pinot Noir	\$1,780	97%	11.6	96%	\$600	\$2,650	\$6,144,472	\$6,693,910
Sangiovese	\$1,593	100%	12.8	100%			\$83,692	\$83,692
Shiraz	\$1,597	95%	13.5	74%	\$600	\$2,550	\$2,399,144	\$2,618,633
Tempranillo	\$1,775	100%	12.5	100%			\$1,225	\$20,750
Total RED							\$15,952,463	\$17,333,940
WHITE								
Chardonnay	\$1,760	92%	12.0	86%	\$715	\$2,760	\$6,600,351	\$8,379,978
Colombard	\$387	100%					\$13,601	\$13,601
Marsanne	\$2,100	100%					\$3,066	\$3,066
Other white	\$706	81%					\$30,101	\$30,101
Pinot Gris	\$1,727	100%	12.8	99%	\$1,500	\$1,952	\$150,982	\$185,798
Riesling	\$1,055	100%	11.8	71%	\$865	\$1,700	\$39,600	\$163,911
Roussanne	\$2,100	100%					\$290	\$290
Sauvignon Blanc	\$1,671	94%	11.7	79%	\$800	\$2,154	\$2,900,891	\$3,810,997
Semillon	\$1,293	94%	11.6	93%	\$710	\$1,952	\$1,299,239	\$1,362,802
Verdelho	\$1,481	100%	12.7	83%	\$1,350	\$1,746	\$276,407	\$276,407
Viognier	\$1,782	97%	12.7	82%	\$1,360	\$2,000	\$94,445	\$98,151
Total WHITE							\$11,408,973	\$14,325,101

* Note: this price does not include end use or other bonuses not paid at the weighbridge

** The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(1) Chardonnay and Pinot Noir are used for sparkling base as well as table wine, which may tend to reduce their average baume reading.

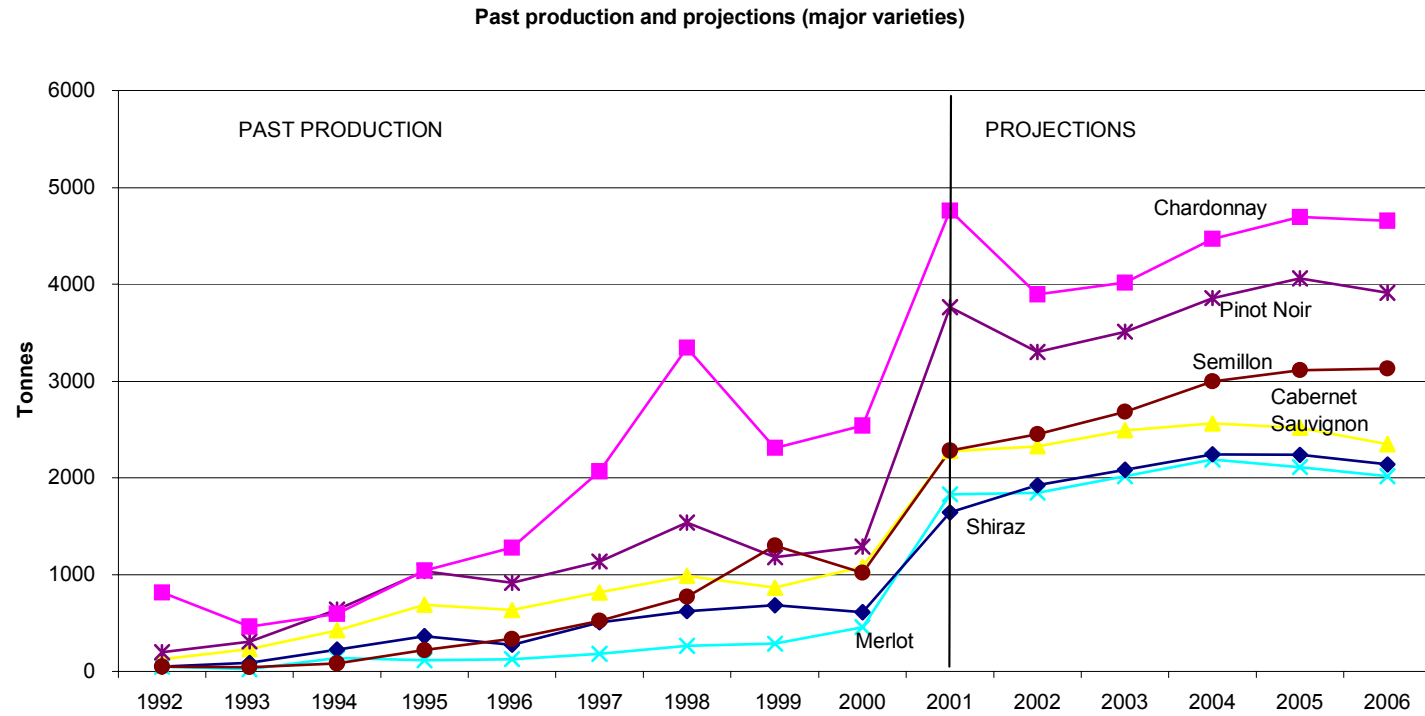
ADELAIDE HILLS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2002 TO 2006

Table 2.3

Variety	2002		2003		2004		2005		2006	
	<i>estimated</i>	<i>preferred</i>	<i>estimated</i>	<i>preferred</i>	<i>estimated</i>	<i>preferred</i>	<i>estimated</i>	<i>preferred</i>	<i>estimated</i>	<i>preferred</i>
RED										
Cabernet Franc	76	28	35	33	35	33	35	33	35	33
Cabernet Sauvignon	2325	1408	2488	1645	2564	1732	2519	1795	2349	1831
Gamay	11	0	0	0	0	0	0	0	0	0
Grenache	15	15	15	15	15	15	15	15	15	15
Merlot	1845	1182	2015	1327	2189	1443	2108	1525	2016	1557
Meunier	334	305	336	305	336	305	336	306	336	308
Nebbiolo	31	27	27	27	27	27	27	27	27	27
Other red	13	13	16	16	18	18	18	18	18	18
Petit Verdot	6	5	12	10	24	25	24	25	24	25
Pinot Noir	3303	2691	3507	2989	3854	3233	4063	3441	3910	3548
Sangiovese	31	0	28	5	33	10	44	20	21	20
Shiraz	1922	1303	2085	1507	2240	1653	2236	1755	2138	1805
Tempranillo	26	19	52	24	69	34	88	53	88	53
Total RED	9939	6995	10615	7902	11404	8527	11513	9012	10977	9239
WHITE										
Chardonnay	3896	3713	4014	4188	4471	4715	4693	4980	4658	5045
Other white	20	15	20	15	20	15	20	15	20	15
Pinot Gris	131	132	165	166	219	228	245	252	245	252
Riesling	162	96	199	137	296	254	362	286	359	311
Sauvignon Blanc	2450	2370	2682	2664	2997	2926	3111	3005	3131	3056
Semillon	910	541	858	589	792	607	778	603	733	606
Traminer	0	0	0	0	80	100	150	125	150	150
Verdelho	187	20	204	20	204	20	204	20	186	20
Viognier	164	160	217	189	284	237	321	288	343	308
Total WHITE	7920	7047	8358	7968	9362	9102	9884	9574	9825	9763

ADELAIDE HILLS PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1992 - 2006

Figure 2.1



ADELAIDE HILLS PLANTINGS BY VARIETY

Table 2.4

Variety	Year planted - area in hectares					Total	Percentage planted in 2000
	Pre-97	1997	1998	1999	2000		
RED WINEGRAPES							
CABERNET FRANC	7	0	0	0	-	8	0%
CABERNET SAUVIGNON	137	59	123	66	10	395	3%
GRENACHE	25	0	1	2	1	29	2%
MALBEC	4	-	-	-	0	4	9%
MERLOT	58	63	80	39	13	255	5%
MEUNIER	19	2	-	-	2	23	10%
NEBBIOLO	0	0	1	-	2	3	61%
PINOT NOIR	125	78	76	57	25	362	7%
SANGIOVESE	1	-	4	6	2	14	15%
SHIRAZ	115	56	99	58	25	354	7%
TEMPRANILLO	-	-	2	2	2	6	33%
OTHER RED	2	1	1	3	-	6	0%
TOTAL RED WINEGRAPES	494	260	386	235	83	1458	6%
WHITE WINEGRAPES							
CHARDONNAY	313	35	56	29	33	466	7%
PINOT GRIS	1	5	3	8	11	28	39%
RIESLING	24	-	1	2	13	40	33%
SAUVIGNON BLANC	133	34	85	21	30	303	10%
SEMILLON	56	16	24	6	6	107	5%
VERDELHO	8	12	2	3	2	27	6%
VIIGNIER	4	-	13	12	14	43	32%
OTHER WHITE	2	0	2	-	-	4	0%
TOTAL WHITE WINEGRAPES	540	103	186	81	108	1018	11%
ROOTSTOCK BLOCK	1	-	-	-	-	1	0%
TOTAL ALL VARIETIES	1035	363	572	316	190	2476	8%

Includes the hundreds of Kondoparinga, Kuitpo, Macclesfield, Onkaparinga, Parrawirra and Talunga.