

ADELAIDE PLAINS VINTAGE OVERVIEW



Vintage report

The growing season got off to a slow start; budburst was a bit late in some vineyards – probably because growers pruned late and the 2002 winter was dry. Uneven buds and shoot lengths were particularly noticeable in Merlot, Shiraz and Cabernet Sauvignon. Some shoot damage occurred in the north east of the Adelaide Plains after a hailstorm and growers often cast their gaze to the sky wishing for rain. By October some growers were concerned that their reds were not setting well and already it was obvious that crops were often patchy and generally down 20-30% (some as much as 50%) due to the earlier than usual warm-to-hot conditions. Setting of whites fared better than reds

December's heatwave meant growers' watering habits had to adapt to keep the vines in a healthy condition. Veraison had occurred but ripening slowed for all varieties, and there was some uneven ripening and sunburn – although that was limited where growers had good canopy to protect the fruit. The upside was that there was very little evidence of downy or powdery mildew, no pests or other diseases, and smaller yields, bunches and berry sizes in the reds were all good indices for premium quality fruit.

Chardonnay was the first to be harvested, sooner than usual in early February, with nice apple and pear flavours and good berry size and condition. By mid-February the reds were also looking good with nice strong colour and flavours, which was in keeping with the previous year's quality.

Harvest was well under way when 45-50mm of rain fell in early March. The Plains became alive with the sounds of sprayers pumping out fungicides to keep botrytis and downy mildew at bay. Some splitting was reported in Merlot and Grenache – and to a lesser extent in Shiraz - and lighter splitting in any Riesling and Chardonnay that was still on the vines.

There are predictions that vintage 2003 on the Adelaide Plains will produce some very good wines, with colours in both the whites and reds looking excellent and a good balance of acidity and baumé levels.

Dr Joe Ceravolo

President - Adelaide Plains Wine Region Inc

Overview of vintage statistics

There were 5512 tonnes crushed in the Adelaide Plains region this year. This was 20% less than in 2002, but still more than was required by the wineries - particularly in red varieties. A slight shortage of Chardonnay was reflected in an increase in the average purchase value per tonne of \$70, while the average purchase value of Semillon was down by \$100 per tonne.

The forecast is for a decline in production of red varieties from this region to just under 4000 tonnes by 2008, when there will still be a 20% surplus. White varieties are expected to grow by 30% over the five year forecast period, with supply and demand being in balance throughout.

There was very little new planting in the region in 2002, and the total area of vineyards declined slightly compared with last year.

ADELAIDE PLAINS CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 3.1

Area in hectares by year planted

Variety	Pre-99	1999	2000	2001	2002	Total	% planted 2002
RED WINEGRAPES							
CABERNET FRANC	3	0	0	0	0	3	0%
CABERNET SAUVIGNON	47	0	6	1	0	53	0%
GRENACHE	24	0	1	4	0	29	0%
MALBEC	6	0	0	0	0	6	0%
MATARO	4	0	0	0	0	4	0%
MERLOT	19	3	5	0	0	27	0%
PETIT VERDOT	0	2	0	0	0	2	0%
PINOT NOIR	16	0	0	0	0	16	0%
RUBY CABERNET	4	0	2	0	0	6	0%
SANGIOVESE	1	0	4	1	0	6	0%
SHIRAZ	118	2	14	12	0	145	0%
OTHER RED	1	0	0	1	0	2	0%
TOTAL RED WINEGRAPES	241	6	32	19	0	298	0%
WHITE WINEGRAPES							
CHARDONNAY	47	0	0	0	2	49	4%
CHENIN BLANC	5	0	0	0	0	5	0%
COLOMBARD	7	0	0	0	1	8	11%
MUSCAT BLANC	1	0	0	0	0	1	0%
MUSCAT GORDO BLANCO	3	0	0	0	0	3	0%
RIESLING	17	0	0	0	0	17	0%
SAUVIGNON BLANC	21	0	0	0	0	21	0%
SEMILLON	7	0	0	0	0	7	0%
VERDELHO	1	0	0	0	0	1	0%
TOTAL WHITE WINEGRAPES	108	0	0	0	3	111	2%
TOTAL ALL VARIETIES	350	6	32	19	3	409	1%

ADELAIDE PLAINS TONNES CRUSHED BY VARIETY - VINTAGE 2003

Table 3.2

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)		
							Own	Other	Preferred
RED									
Cabernet Sauvignon	19	628	647	673	97%	96%	3	6	8
Grenache	0	232	232	200	100%	116%	0	4	3
Malbec	0	152	152	127	100%	119%	0	4	4
Mataro (Mouvedre)	0	48	48	30	100%	161%	0	2	1
Merlot	63	368	430	352	85%	122%	3	7	9
Other red	0	7	7	12	100%	58%	0	1	1
Pinot Noir	0	278	278	278	100%	100%	0	1	1
Ruby Cabernet	12	5	17	18	31%	97%	1	1	1
Sangiovese	0	41	41	50	100%	82%	0	1	1
Shiraz	99	1641	1740	1444	94%	121%	3	11	13
Zinfandel	0	31	31	31	100%	101%	0	1	1
Total RED	192	3431	3623	3214	95%	113%			
WHITE									
Chardonnay	23	1072	1096	1188	98%	92%	2	6	8
Chenin Blanc	0	57	57	0	100%		0	1	0
Colombard	72	104	176	180	59%	98%	1	2	1
Muscat Blanc (Frontignac)	0	1	1	1	100%	100%	0	1	1
Muscat Gordo Blanco	0	13	13	25	100%	52%	0	1	1
Other white	0	2	2	0	100%		0	1	0
Riesling	34	145	179	176	81%	102%	1	2	3
Sauvignon Blanc	0	204	204	231	100%	88%	0	5	4
Semillon	0	156	156	143	100%	109%	0	3	2
Verdelho	5	0	5	12	0%	42%	1	0	1
Total WHITE	134	1754	1888	1957	93%	97%			
Total for region	326	5185	5512	5171					

ADELAIDE PLAINS CROP VALUE DATA - VINTAGE 2003

Table 3.3

Variety (1)	Grower grown	Total crushed	estimated total value		lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
			purchased grapes	total grapes				
RED								
Cabernet Sauvignon	628	647	\$790,062	\$813,373	\$1,000	\$1,900	\$1,258	100%
Grenache	232	232	\$193,637	\$193,637	\$600	\$1,200	\$833	100%
Malbec	152	152	\$175,031	\$175,031	\$917	\$1,414	\$1,154	100%
Mataro (Mouvedre)	48	48	\$63,096	\$63,096			\$1,308	100%
Merlot	368	430	\$464,239	\$543,648	\$1,200	\$1,900	\$1,263	100%
Pinot Noir	278	278	\$242,865	\$242,865			\$875	100%
Ruby Cabernet	5	17	\$3,801	\$12,201			\$700	100%
Sangiovese	41	41	\$49,250	\$49,250			\$1,201	100%
Shiraz	1641	1740	\$2,177,095	\$2,308,153	\$800	\$2,500	\$1,327	100%
Zinfandel	31	31	\$23,430	\$23,430			\$750	100%
Total RED	3424	3616	\$4,182,506	\$4,424,685				
WHITE								
Chardonnay	1072	1096	\$1,288,115	\$1,316,195	\$600	\$1,400	\$1,201	100%
Chenin Blanc	57	57	\$25,713	\$25,713			\$451	100%
Colombard	104	176	\$71,206	\$120,583			\$684	100%
Muscat Blanc (Frontignac)	1	1	\$1,101	\$1,101			\$786	100%
Muscat Gordo Blanco	13	13	\$6,500	\$6,500			\$500	100%
Other white	2	2	\$556	\$557			\$350	100%
Riesling	145	179	\$105,790	\$130,164			\$728	100%
Sauvignon Blanc	204	204	\$172,803	\$172,803	\$600	\$950	\$847	100%
Semillon	156	156	\$114,012	\$114,012	\$500	\$800	\$733	100%
Total WHITE	1754	1883	\$1,785,796	\$1,887,628				

(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 does not include end use bonuses or other adjustments determined post-receival.

ADELAIDE PLAINS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2004 TO 2008

Table 3.4

Variety	2004		2005		2006		2007		2008	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Sauvignon	775	672	777	672	509	422	511	422	487	422
Grenache	202	185	220	185	180	135	180	135	161	135
Malbec	108	108	100	100	100	100	100	100	100	100
Mataro (Mouvedre)	70	30	70	30	50	30	52	30	51	30
Merlot	537	416	589	466	622	506	625	517	611	517
Pinot Noir	351	328	250	227	250	227	250	227	250	227
Ruby Cabernet	20	20	16	16	16	16	16	16	16	16
Sangiovese	50	50	50	50	50	50	50	50	50	50
Shiraz	2288	1779	2434	1894	2092	1629	2061	1630	2039	1630
Zinfandel	30	30	0	0	0	0	0	0	0	0
Total for RED	4430	3617	4505	3639	3868	3114	3844	3126	3764	3126
WHITE										
Chardonnay	1186	1174	1407	1345	1369	1304	1480	1434	1482	1454
Chenin Blanc	24	0	24	0	24	0	24	0	24	0
Colombard	187	190	192	180	190	200	195	210	200	210
Muscat Blanc (Frontignac)	1	1	1	1	1	1	1	1	1	1
Muscat Gordo Blanco	25	25	25	25	25	25	25	25	25	25
Riesling	201	202	151	151	151	152	151	152	151	152
Sauvignon Blanc	380	353	493	465	634	625	735	725	735	725
Semillon	153	160	153	160	73	50	73	50	73	50
Verdelho	8	12	6	12	8	12	10	12	12	12
Viognier	90	90	200	200	200	200	200	200	200	200
Total for WHITE	2257	2207	2652	2539	2675	2569	2894	2809	2903	2829
Total for region	6687	5824	7157	6178	6543	5683	6738	5935	6667	5955

ADELAIDE PLAINS PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1994 - 2008

Figure 3.1

Past production and projections (major varieties)

