

# ***Clare Valley regional vintage summary***

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## **CLARE VALLEY VINTAGE OVERVIEW**

### *Vintage report*

Vintage 2001 in the Clare Valley has been very positive. There is a general feeling of satisfaction with what has been achieved this vintage and enthusiasm about the potential of the 2001 wines.

Yields were well up on last year and for the most part about average for the district. Riesling and Shiraz are the highlights with very high quality wines appearing. Likewise there have been many reports of very high quality Cabernet Sauvignon and Semillon.

For most wineries vintage started quite early with a considerable amount of fruit picked by the end of February. For many it was an extended vintage that was quite frenetic in the early to middle stages. It was a year of low acid and higher than normal pH levels but achieving the desired wine specifications was generally not difficult.

Despite the intense and extended periods of hot weather in January and February most vineyards coped very well. This was due in no small part to the excellent winter and spring rains, and then later in the season to good irrigation management. There was very good early spring growth leading to canopies that provided some protection for fruit later in the season.

It was an unusual vintage regarding the timing of ripening and the order in which varieties ripened. There was some very early Riesling and later Shiraz and Cabernet Sauvignon ripening at the same time. This caused logistical problems in some wineries.

Riesling has been a highlight in 2001 in spite of the harsh pre-vintage weather conditions. Riesling vines showed considerable resilience in coping with the intense heat. There was very little sunburn of fruit and many vineyards retained good canopies through to picking. Winemakers have commented about good fruit intensity, fine structure, excellent varietal character, good flavours at low baumé levels, and of the wines being quite aromatic. The apparent paradox of high quality Riesling in a year of far less than ideal weather conditions has been the subject of many conversations in the Clare Valley recently.

It was also a very good year for red varieties. The wines are showing deep colour, intense rich flavours, good structure and mature ripe tannins. High baumé levels have led to high alcohol wines. Excellent Shiraz with very good and diverse varietal character has been a

feature. Although some variation in quality has been noted about Cabernet Sauvignon, the majority report well-structured wines. There appeared to be a strong positive correlation between high quality and low yields in both Shiraz and Cabernet Sauvignon.

### *Overview of vintage statistics*

The Clare Valley crushed a total of 23493 tonnes in 2001, compared with 12,444 tonnes in 2000 – an increase of nearly 100%. However, 2000 was a particularly low yielding vintage. The vintage was about 15% higher than 1998 and 1999.

While there was a slight surplus of grapes overall, Riesling and Merlot in particular were in short supply.

The weighted average weighbridge prices for red varieties were within 1% of last year overall, while prices for white varieties were up by 10% overall. This was almost entirely because of an increase of \$200 in the average price paid for Riesling.

Substantial growth is forecast for the region over the next five years. Cabernet Sauvignon alone is expected to grow by 37% next year, and by 80% over five years. Shiraz is not far behind with expected growth of 70% by 2006. However, for both varieties the preferred tonnages are below the estimated tonnages in each of the forecast years, implying a surplus of fruit. On the other hand, Riesling is expected to be in short supply, with a 35% shortfall forecast for 2006. These are expected to be the three major varieties for the region.

There are 4434 hectares of vines currently planted in Clare. The new plantings in 2000 were almost entirely Shiraz, Cabernet Sauvignon and Riesling. Another 900 hectares is estimated to be required by 2003 to meet the forecast demand in 2006.

## CLARE VALLEY TONNES CRUSHED BY VARIETY - VINTAGE 2001

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	90	118	208	162	57%	128%	9	11	14
Cabernet Sauvignon	2992	1889	4881	5084	39%	96%	18	18	27
Grenache	65	302	367	337	82%	109%	3	11	11
Malbec	197	13	210	242	6%	87%	10	4	11
Mataro (Mouvedre)	10	16	26	40	61%	64%	3	2	5
Merlot	837	394	1231	1431	32%	86%	13	10	16
Muscat Brown (Red Front)	9	0	9	9	0%	100%	1	0	1
Nebbiolo	1	4	5	0	80%		1	1	0
Petit Verdot	47	1	48	22	2%	219%	4	1	3
Pinot Noir	197	99	297	197	34%	151%	4	4	4
Ruby Cabernet	15	0	15	15	0%	100%	1	0	1
Sangiovese	55	12	68	17	18%	398%	3	2	2
Shiraz	3597	3595	7192	6552	50%	110%	17	18	27
Touriga	15	0	15	15	0%	100%	1	0	1
Zinfandel	2	0	2	2	0%	100%	1	0	1
<b>Total RED</b>	<b>8130</b>	<b>6444</b>	<b>14573</b>	<b>14125</b>	<b>44%</b>	<b>103%</b>			
<b>WHITE</b>									
Chardonnay	2089	1043	3132	2769	33%	113%	13	14	19
Chenin Blanc	7	48	56	43	87%	129%	1	6	4
Crouchen	74	0	74	107	0%	69%	2	0	2
Muscadelle (Tokay)	22	0	22	22	0%	100%	1	0	1
Muscat Blanc (Frontignac)	11	0	11	11	0%	100%	1	0	1
Muscat Gordo Blanco	1	0	1	1	0%	100%	1	0	1
Other white	6	2	8	7	21%	102%	2	1	2
Pedro Ximenes	30	16	46	30	35%	153%	1	1	1
Pinot Gris	4	0	4	8	0%	51%	2	0	2
Riesling	2078	1333	3411	4622	39%	74%	18	17	28
Sauvignon Blanc	156	80	237	228	34%	104%	4	7	7
Semillon	763	1054	1817	891	58%	204%	11	14	16
Traminer	55	29	85	45	35%	189%	4	1	4
Verdelho	15	0	15	15	0%	100%	1	0	1
Viognier	2	0	2	5	0%	35%	1	0	1
<b>Total WHITE</b>	<b>5315</b>	<b>3605</b>	<b>8920</b>	<b>8806</b>	<b>40%</b>	<b>101%</b>			
<b>Grand Total</b>	<b>13444</b>	<b>10049</b>	<b>23493</b>	<b>22931</b>					

## CLARE VALLEY PRICE AND BAUME DATA - VINTAGE 2001

Table 5.2

Variety	weighted average weighbridge		weighted average baumé		lowest price**	highest price**	estimated total value	
	price*						purchased grapes	total grapes
<b>RED</b>								
Cabernet Franc	\$1,123	100%	14.1	77%	\$800	\$1,800	\$132,718	\$233,758
Cabernet Sauvignon	\$1,664	100%	13.9	95%	\$1,000	\$2,575	\$3,142,303	\$8,118,966
Grenache	\$1,099	100%	14.4	94%	\$710	\$1,500	\$331,483	\$402,738
Malbec	\$1,440	100%	13.4	100%	\$1,250	\$2,000	\$19,104	\$302,253
Mataro (Mouvedre)	\$1,061	100%	12.2	22%			\$16,742	\$27,246
Merlot	\$1,382	100%	14.1	93%	\$1,231	\$2,100	\$544,432	\$1,701,442
Nebbiolo	\$1,650	100%					\$7,029	\$8,745
Petit Verdot	\$2,000	100%	13.5	100%			\$2,180	\$96,280
Pinot Noir	\$961	100%	11.2	91%	\$945	\$1,000	\$95,494	\$285,052
Sangiovese	\$1,422	100%	13.3	100%			\$17,713	\$96,185
Shiraz	\$1,696	100%	13.6	96%	\$1,050	\$2,575	\$6,094,923	\$12,194,514
<b>Total RED</b>							<b>\$10,404,121</b>	<b>\$23,467,178</b>
<b>WHITE</b>								
Chardonnay	\$1,236	100%	12.9	97%	\$1,025	\$1,470	\$1,289,067	\$3,870,911
Chenin Blanc	\$627	91%	11.7	50%	\$325	\$750	\$30,380	\$35,024
Other white	\$1,000	100%					\$1,600	\$7,530
Pedro Ximenes	\$370	100%	9.8	100%			\$5,868	\$16,916
Riesling	\$1,162	100%	11.7	94%	\$865	\$1,600	\$1,548,610	\$3,963,604
Sauvignon Blanc	\$1,042	100%	12.3	100%	\$950	\$1,250	\$83,701	\$246,538
Semillon	\$982	100%	11.9	95%	\$720	\$1,350	\$1,034,346	\$1,783,454
Traminer	\$715	100%	13.3	100%			\$21,035	\$60,653
<b>Total WHITE</b>							<b>\$4,014,607</b>	<b>\$9,984,631</b>

\* 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.

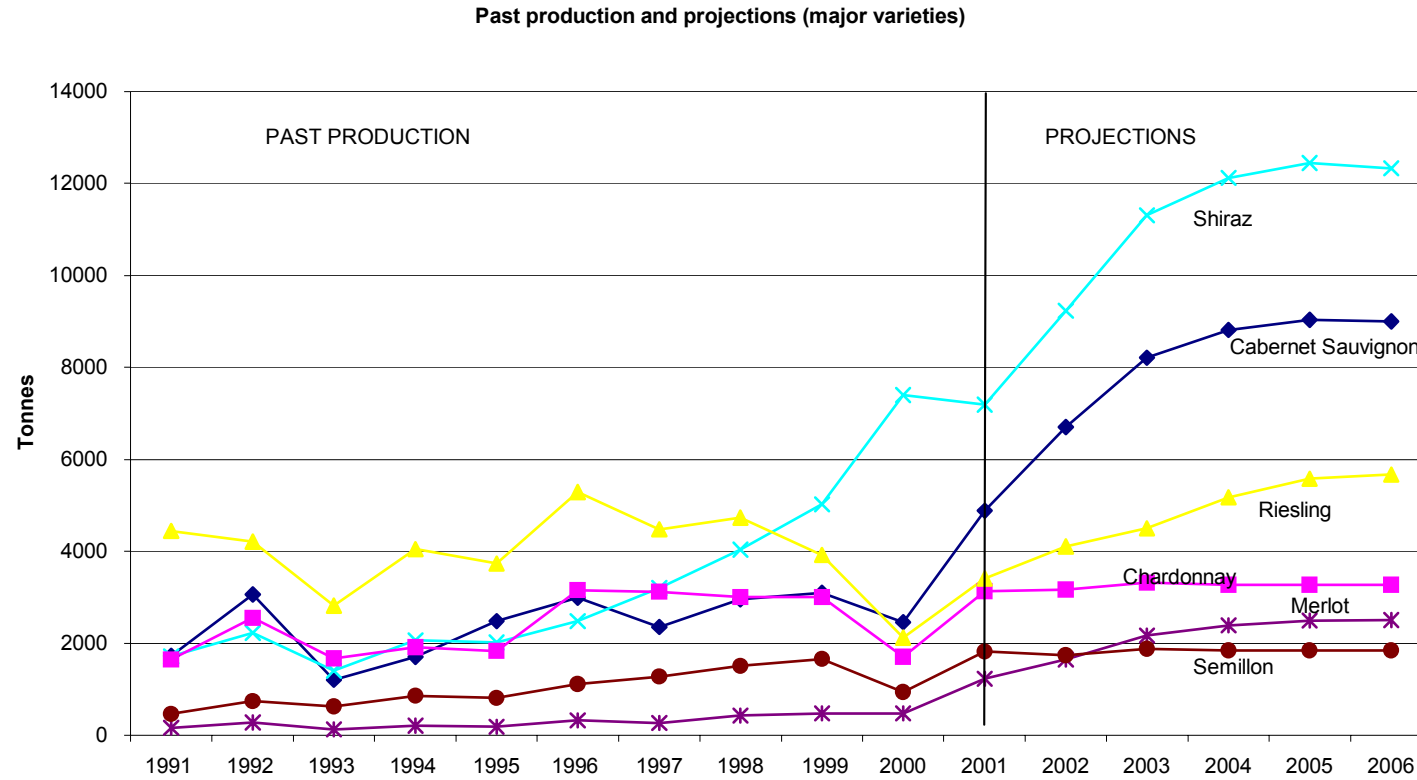
**CLARE VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2002 TO 2006**

Table 5.3

Variety	2002		2003		2004		2005		2006	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
<b>RED</b>										
Barbera	5	5	10	10	17	17	17	17	17	17
Cabernet Franc	204	166	214	166	214	166	214	166	214	166
Cabernet Sauvignon	6702	6434	8207	7356	8818	7805	9034	8045	9006	8132
Grenache	355	281	355	292	355	292	355	292	355	292
Malbec	264	263	301	278	321	293	323	293	328	293
Mataro (Mouvedre)	33	38	58	54	80	76	93	89	93	89
Merlot	1651	1597	2167	1912	2393	2048	2489	2135	2508	2159
Muscat Brown (Red Front)	9	9	9	9	9	9	9	9	9	9
Nebbiolo	9	5	20	7	25	12	25	12	25	12
Other red	5	5	7	7	12	12	12	12	12	12
Petit Verdot	185	72	256	72	281	132	293	187	298	192
Pinot Noir	224	178	200	170	200	170	200	170	200	170
Ruby Cabernet	15	15	15	15	15	15	15	15	15	15
Sangiovese	53	43	123	108	198	183	225	210	225	210
Shiraz	9231	8106	11306	9694	12119	10445	12442	10904	12330	10980
Tempranillo	8	8	24	24	36	36	36	36	36	36
Touriga	15	15	15	15	15	15	15	15	15	15
Zinfandel	2	2	2	2	2	2	2	2	2	2
<b>Total RED</b>	<b>18969</b>	<b>17241</b>	<b>23289</b>	<b>20191</b>	<b>25110</b>	<b>21728</b>	<b>25799</b>	<b>22609</b>	<b>25688</b>	<b>22801</b>
<b>WHITE</b>										
Chardonnay	3163	2807	3312	2920	3274	2930	3275	2970	3271	2985
Chenin Blanc	44	34	34	34	32	32	32	32	32	32
Crouchen	107	107	107	107	107	107	107	107	107	107
Muscadelle (Tokay)	22	22	22	22	22	22	22	22	22	22
Muscat Blanc (Frontignac)	11	11	11	11	11	11	11	11	11	11
Other white	5	5								
Pedro Ximenes	45	62	45	62	45	62	45	62	45	62
Pinot Gris	8	8	15	15	23	23	23	23	23	23
Riesling	4106	5332	4497	6060	5168	6959	5575	7381	5677	7648
Sauvignon Blanc	273	238	274	243	270	243	272	242	274	242
Semillon	1743	926	1881	942	1843	955	1848	958	1842	953
Traminer	75	45	75	45	75	45	75	45	75	45
Verdelho	15	15	15	15	15	15	15	15	15	15
Viognier	8	15	31	37	59	70	69	90	69	100
<b>Total WHITE</b>	<b>9626</b>	<b>9628</b>	<b>10320</b>	<b>10514</b>	<b>10945</b>	<b>11476</b>	<b>11370</b>	<b>11960</b>	<b>11463</b>	<b>12246</b>

# CLARE VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2006

Figure 5.1



**CLARE VALLEY PLANTINGS BY VARIETY**

Table 5.4

Variety	Year planted - area in hectares					Total	Percentage planted in 2000
	Pre-97	1997	1998	1999	2000		
<b>RED WINEGRAPES</b>							
CABERNET FRANC	27	-	2	2	-	30	0%
CABERNET SAUVIGNON	523	231	223	122	59	1158	5%
GRENACHE	56	1	2		4	64	6%
MALBEC	29	7	11	22	1	70	1%
MERLOT	96	56	71	32	2	256	1%
PETIT VERDOT	5	3	11	1	-	20	0%
PINOT NOIR	22	-	-	-	-	22	0%
SANGIOVESE	2	6	6	13	1	27	4%
SHIRAZ	669	195	281	247	105	1497	7%
OTHER RED	8	1	2	10	7	28	26%
<b>TOTAL RED WINEGRAPES</b>	<b>1436</b>	<b>499</b>	<b>608</b>	<b>448</b>	<b>179</b>	<b>3171</b>	<b>6%</b>
<b>WHITE WINEGRAPES</b>							
CHARDONNAY	324	22	-	0	-	346	0%
PEDRO XIMENEZ	19	-	-	-	-	19	0%
RIESLING	492	7	24	39	47	610	8%
SAUVIGNON BLANC	37	-	-	-	-	37	0%
SEMILLON	149	44	9	1	-	203	0%
TRAMINER	12	-	-	-	-	12	0%
OTHER WHITE	30	-	1	1	4	35	10%
<b>TOTAL WHITE WINEGRAPES</b>	<b>1063</b>	<b>73</b>	<b>35</b>	<b>41</b>	<b>51</b>	<b>1263</b>	<b>4%</b>
<b>TOTAL ALL VARIETIES</b>	<b>2499</b>	<b>572</b>	<b>643</b>	<b>490</b>	<b>230</b>	<b>4434</b>	<b>5%</b>

*Includes the hundreds of Clare, Gilbert, Milne and Upper Wakefield*