

Eden Valley regional vintage summary

EDEN VALLEY VINTAGE OVERVIEW

Vintage report

(See also Barossa Valley vintage report.)

2001 was a good strong vintage for reds, especially Shiraz. In the field the vines suffered immensely with heat and water stress, but with regular irrigations and balanced crop loads the vines held on and produced some excellent quality fruit. Some vineyards lost too much leaf early and struggled to ripen to their target baumé. This problem was exacerbated with rain and cool weather slowing ripening towards the end of the vintage period. Eden Valley produced some rich full-bodied Shiraz and Cabernet Sauvignon. Chardonnay and Riesling held out well despite the heat, producing some quite delicate flavours characteristic of the Eden Valley region.

Disease pressure was low, with routine protection sprays coping adequately.

Overview of vintage statistics

Eden Valley produced just over 11,000 tonnes in 2001. While this was a 70% increase on the 2000 vintage, it was in line with previous vintages. There was a surplus of red grapes, but a 20% shortfall in white varieties – mainly Chardonnay. Eden Valley is the only region where the white crush exceeded the red crush in 2001.

Average weighbridge prices in Eden Valley decreased by 1% overall for red varieties, but increased by 10% overall for white varieties. In particular, the average price for Riesling was up by \$200 per tonne and (on its coat-tails) Traminer was also up by \$200 per tonne. Viognier was up by over \$500 per tonne, but much smaller tonnages are involved.

The forecast for Eden Valley is very interesting, as it shows a substantial mismatch between estimated supply and demand. The forecast is for the estimated supply of red grapes to overtake white grapes in 2004. However, the demand is for more white varieties than red. There is therefore expected to be a shortfall of nearly 50% in white varieties by 2006, while there is a surplus of 20% in reds. The shortfall is entirely in the varieties Chardonnay and Riesling. The projections graph shows that Shiraz will equal Riesling in production, whereas the demand is for nearly twice as much Riesling as Shiraz. Meanwhile Cabernet Sauvignon is expected to equal Chardonnay by 2004, whereas demand is for three times as much Chardonnay as Cabernet Sauvignon.

It is difficult to compare the production forecasts with the planting data, because it is not possible to separate the Barossa Valley from Eden Valley in terms of planting data. However, the figures show that only 8 hectares of Chardonnay were planted in 2000 across the whole of the Barossa zone, and 27 of Riesling. This is not nearly enough to meet the anticipated shortfall in Eden Valley of 1200 tonnes of Riesling and 2,400 tonnes of Chardonnay in 2006.

EDEN VALLEY TONNES CRUSHED BY VARIETY - VINTAGE 2001

Table 7.1

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	18	18	36	40	50%	90%	3	1	4
Cabernet Sauvignon	827	582	1409	1034	41%	136%	7	14	15
Grenache	32	29	61	35	47%	173%	2	4	3
Mataro (Mouvedre)	0	0	0	1	100%	40%	0	1	1
Merlot	202	54	255	391	21%	65%	6	4	8
Meunier	40	0	40	41	0%	97%	2	0	2
Muscat Brown (Red Front)	0	1	1	0	100%		0	1	0
Pinot Noir	329	318	647	646	49%	100%	5	7	8
Sangiovese	2	0	2	2	0%	92%	1	0	1
Shiraz	951	1645	2596	2112	63%	123%	6	15	15
Zinfandel	3	0	3	7	0%	43%	1	0	1
Total RED	2403	2646	5049	4309	52%	117%			
WHITE									
Chardonnay	1078	1087	2164	3456	50%	63%	9	11	14
Chenin Blanc	0	5	5	8	100%	68%	0	1	1
Muscadelle (Tokay)	0	21	21	20	100%	103%	0	2	1
Muscat Blanc (Frontignac)	22	19	41	37	47%	111%	1	3	2
Other white	11	0	11	11	0%	100%	2	0	2
Pedro Ximenes	0	2	2	0	100%		0	1	0
Pinot Gris	15	27	42	65	64%	65%	3	1	3
Riesling	1599	1243	2842	3085	44%	92%	6	15	17
Sauvignon Blanc	237	62	299	326	21%	92%	4	2	3
Semillon	82	253	336	314	75%	107%	3	7	8
Traminer	175	69	245	216	28%	113%	5	4	6
Viognier	27	46	73	100	63%	73%	1	1	1
Total WHITE	3247	2835	6082	7637	47%	80%			
Grand Total	5650	5481	11131	11946					

EDEN VALLEY PRICE AND BAUME DATA - VINTAGE 2001

Table 7.2

Variety	weighted average weighbridge		weighted average baumé		lowest price**	highest price**	estimated total value	
	price*						purchased grapes	total grapes
RED								
Cabernet Franc	\$1,582	100%					\$28,774	\$56,985
Cabernet Sauvignon	\$1,938	100%	13.8	92%	\$954	\$4,750	\$1,127,941	\$2,731,012
Grenache	\$901	100%	13.8	48%	\$740	\$950	\$25,828	\$54,566
Mataro (Mouvedre)	\$1,500	100%	14.8	100%			\$600	\$600
Merlot	\$1,699	100%	13.3	94%	\$1,500	\$1,850	\$90,955	\$433,519
Muscat Brown (Red Front)	\$700	100%					\$742	\$742
Pinot Noir	\$1,253	100%	10.6	97%	\$970	\$2,000	\$398,116	\$810,579
Shiraz	\$2,075	100%	13.8	88%	\$220	\$3,650	\$3,413,069	\$5,385,912
Total RED							\$5,086,025	\$9,473,914
WHITE								
Chardonnay	\$1,281	100%	12.6	80%	\$720	\$1,800	\$1,392,391	\$2,773,329
Chenin Blanc	\$610	100%	12.0	100%			\$3,294	\$3,294
Muscadelle (Tokay)	\$891	100%	11.9	100%			\$18,269	\$18,269
Muscat Blanc (Frontignac)	\$656	100%	11.9	81%	\$500	\$700	\$12,589	\$27,021
Pedro Ximenes	\$260	100%					\$481	\$481
Pinot Gris	\$1,500	100%	12.0	100%			\$40,395	\$63,563
Riesling	\$1,283	100%	11.8	79%	\$920	\$2,662	\$1,594,682	\$3,645,017
Sauvignon Blanc	\$1,229	100%	9.7	100%			\$76,510	\$368,069
Semillon	\$1,197	100%	11.8	76%	\$900	\$1,430	\$303,373	\$402,050
Traminer	\$1,031	100%	12.2	90%	\$800	\$1,100	\$71,201	\$252,059
Viognier	\$2,162	100%	13.2	100%			\$99,888	\$157,689
Total WHITE							\$3,613,073	\$7,710,841

* 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.

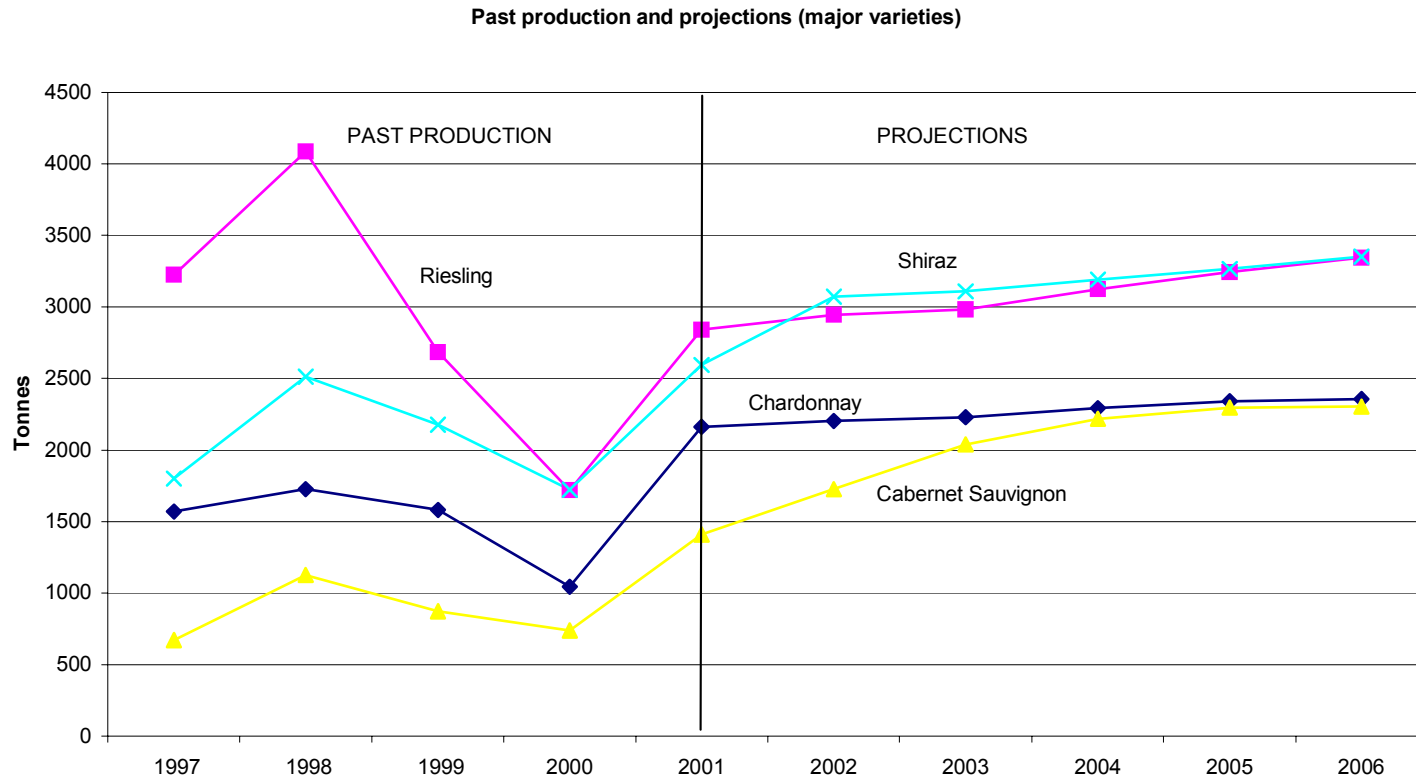
EDEN VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2002 TO 2006

Table 7.3

Variety	2002		2003		2004		2005		2006	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Franc	50	50	36	36	36	36	36	36	36	36
Cabernet Sauvignon	1725	1208	2038	1292	2218	1388	2298	1482	2303	1509
Grenache	61	31	60	31	60	31	48	19	48	19
Mataro (Mouvedre)	21	21	46	46	61	61	61	61	61	61
Merlot	324	467	435	479	549	507	607	587	639	643
Meunier	26	26	26	26	26	26	26	26	26	26
Muscat Brown (Red Front)	1	0	1	0						
Pinot Noir	579	758	558	745	569	759	579	771	589	794
Sangiovese	5	5	9	9	9	9	9	9	9	9
Shiraz	3071	2307	3109	2451	3192	2477	3267	2514	3351	2553
Zinfandel	4	7	4	7	4	7	4	7	4	7
Total RED	5867	4880	6322	5122	6724	5301	6935	5512	7066	5657
WHITE										
Chardonnay	2203	3734	2230	4120	2292	4582	2340	4632	2357	4712
Chenin Blanc	8	0	8	0	8	0	8	0	8	0
Muscadelle (Tokay)	46	40	40	40	40	40	40	40	40	40
Muscat Blanc (Frontignac)	29	25	29	25	25	25	25	25	25	25
Other white	15	15	10	10	10	10	10	10	10	10
Pedro Ximenes	4	0	4	0	4	0	4	0	4	0
Pinot Gris	45	67	50	67	56	76	59	86	64	96
Riesling	2944	3560	2981	3902	3125	4171	3244	4279	3344	4536
Sauvignon Blanc	266	294	266	314	266	344	266	344	266	344
Semillon	407	314	415	316	415	316	415	346	415	348
Traminer	227	173	227	171	227	172	233	173	239	173
Viognier	100	125	166	166	198	198	217	217	224	224
Total WHITE	6293	8347	6426	9131	6666	9934	6861	10152	6996	10508

EDEN VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1997 - 2006

Figure 7.1



BAROSSA ZONE (BAROSSA VALLEY AND EDEN VALLEY) PLANTINGS BY VARIETY

Table 7.4

Year planted - area in hectares

Variety	Pre-97	1997	1998	1999	2000	Total	% planted in 2000
RED WINEGRAPES							
CABERNET FRANC	62	1	-	-	3	66	4%
CABERNET SAUVIGNON	817	161	211	136	81	1406	6%
GRENACHE	609	6	6	25	16	662	2%
MALBEC	20	1	-	-	-	21	0%
MATARO	95	2	4	13	4	117	4%
MERLOT	117	52	39	33	33	274	12%
PETIT VERDOT	1	7	5	3	4	21	20%
PINOT NOIR	151	9	5	6	2	172	1%
SANGIOVESE	2	7	1	2	8	21	39%
SHIRAZ	1999	413	542	392	187	3533	5%
OTHER RED	39	1	3	12	16	70	22%
TOTAL RED WINEGRAPES	3912	660	816	622	352	6363	6%
WHITE WINEGRAPES							
CHARDONNAY	709	10	2	6	8	736	1%
CHENIN BLANC	90	-	-	-	-	90	0%
MUSCADELLE	80	-	-	-	-	80	0%
MUSCAT BLANC	67	0	-	-	-	67	0%
PALOMINO	24	-	-	-	-	24	0%
PEDRO XIMENEZ	42	-	-	-	-	42	0%
PINOT GRIS	1	0	4	3	-	8	0%
RIESLING	748	3	10	21	27	810	3%
SAUVIGNON BLANC	134	2	1	3	2	141	1%
SEMILLON	767	33	5	6	1	812	0%
TRAMINER	41	0	-	-	-	42	0%
VERDELHO	1	2	-	1	1	5	27%
VIIGNIER	7	4	2	3	11	26	40%
OTHER WHITE + MULTIPURPOSE	50	1	-	1	-	52	0%
TOTAL WHITE WINEGRAPES	2762	56	24	44	50	2935	2%
OTHER VARIETIES							
ROOTSTOCK BLOCK	-	-	-	15	-	15	0%
TOTAL ALL VARIETIES	6674	716	840	680	402	9313	4%

Includes the hundreds of Barossa, Belvidere, Dutton, Jellicoe, Jutland, Moorooroo, Nuriootpa and Pt Gawler