

RIVERLAND VINTAGE OVERVIEW

Vintage report

The season was largely dominated by the extreme heat that occurred after January. This heat stressed the vines to the extent that cropping levels for most of the red varieties were reduced. Generally the quality of these reds was not quite as high as in previous years, although some wineries reported parcels of exceptional fruit quality.

The white varieties did not seem to suffer from the heat as higher cropping levels were reported. Chardonnay quality was very high, with wineries reporting having trouble trying to find fruit of lower quality to meet particular product specifications.

Due to the heat and dry conditions there was very little fungal disease reported. This led to good quality outcomes in Semillon and other botrytis-prone varieties.

Overall it was a season of mixed fortunes, showing the importance of having a balanced planting in the vineyard.

The projections for the region are for continued steady growth in reds and whites. Reds are projected to grow by 25% by 2006, with supply and demand in balance. This growth translates to 50,000 tonnes – the size of the next largest region in the state!

Whites are projected to grow by 20%, also with supply and demand in balance – except for a shortfall in Riesling and Muscat Gordo Blanco.

Shiraz has been climbing steeply since 1997, and has been the major variety since 2000. Chardonnay and Cabernet Sauvignon are equal second. This pattern is expected to continue over the forecast period.

There has only been a 3% increase in new plantings in the Riverland in 2000. There are now a total of 18,245 hectares planted. This means an estimated requirement for a further 2,500 hectares to be planted by 2003 to meet the projected demand in 2006.

Overview of vintage statistics

The Riverland produced 48% of the state's record-breaking crush, with 327,104 tonnes – an increase of 34,000 tonnes over last year. In fact, the crush of white grapes was down by 2,000 tonnes overall – caused by a drastic reduction in the production of the multipurpose varieties Sultana (down 6,000 tonnes) and Muscat Gordo Blanco (down 2,500 tonnes). 60% of the crush was red varieties, and there was a slight surplus of reds – with the exception of Grenache, which showed a 50% shortfall! There was a slight shortfall of white varieties – mainly Chardonnay and Sultana.

The contribution of the Riverland crush to the state's economy was \$215 million – compared with \$191 million last year. The Riverland contributed 28% of the crush by value.

The weighted average weighbridge prices were similar to last year. Most reds were down by \$20 to \$50 per tonne, and Cabernet Sauvignon was down by approximately \$100 per tonne. However, most whites were up by a similar amount, and Verdelho was up by \$100 per tonne. On average, reds were down \$55 and whites were up \$52 per tonne.

RIVERLAND PLANTINGS BY VARIETY

Table 14.1

Variety	Year planted - area in hectares					Total	% planted in 2000
	Pre-97	1997	1998	1999	2000		
RED WINEGRAPES							
CABERNET SAUVIGNON	1408	719	733	270	111	3241	3%
DURIF	-	-	-	1	6	7	88%
GRENACHE	523	16	60	46	9	654	1%
MALBEC	68	0	2	0	0	70	1%
MATARO	292	29	55	17	7	400	2%
MERLOT	251	317	278	89	33	968	3%
PETIT VERDOT	31	49	120	205	58	463	13%
PINOT NOIR	30	5	11	35	38	119	32%
RUBY CABERNET	363	66	185	208	31	852	4%
SANGIOVESE	-	13	11	5	2	31	7%
SHIRAZ	2510	808	607	282	75	4282	2%
OTHER RED	108	9	15	3	1	137	1%
TOTAL RED WINEGRAPES	5583	2032	2076	1160	371	11223	3%
WHITE WINEGRAPES							
CHARDONNAY	1980	140	47	28	50	2245	2%
CHENIN BLANC	204	1	4	1		210	0%
COLOMBARD	378	35	66	108	68	655	10%
DORADILLO	220	-	-	-	-	220	0%
PALOMINO	79	-	-	-	-	79	0%
RIESLING	258	0	0	-	2	261	1%
SAUVIGNON BLANC	132	6	-	-	-	137	0%
SEMILLON	291	27	11	11	12	352	3%
TREBBIANO	79	1	-	-	-	80	0%
VERDELHO	60	13	26	6	3	108	3%
VIOGNIER	5	0	2	8	14	29	48%
OTHER WHITE	335	0	3	2	1	341	0%
TOTAL WHITE WINEGRAPES	4021	222	159	164	150	4717	3%
OTHER VARIETIES							
MUSCAT GORDO BLANCO	1207	15	11	3	3	1239	0%
SULTANA	717	3	5	3	5	733	1%
OTHER MULTIPURPOSE	201	2	4	4	2	212	1%
TABLEGRAPES	67	4	5	0	-	77	0%
ROOTSTOCK BLOCK	32	9	-	3	-	45	0%
TOTAL OTHER VARIETIES	2226	33	25	13	10	2305	0%
TOTAL ALL VARIETIES	11829	2288	2261	1338	530	18245	3%

RIVERLAND TONNES CRUSHED BY VARIETY (RED) - VINTAGE 2001

Table 14.2

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	24	24	10	100%	240%	0	2	1
Cabernet Franc	0	125	125	140	100%	89%	0	4	3
Cabernet Sauvignon	7840	47751	55591	53762	86%	103%	8	23	23
Carignan	321	21	342	265	6%	129%	2	2	2
Carina	0	203	203	172	100%	118%	0	2	2
Chambourcin	0	105	105	98	100%	107%	0	2	2
Cinsaut	101	0	101	100	0%	101%	1	0	1
Durif	0	6	6	10	100%	60%	0	1	1
Grenache	1030	9710	10740	14866	90%	72%	6	14	14
Malbec	362	487	849	1017	57%	83%	5	7	7
Mataro (Mouvedre)	232	7571	7803	10139	97%	77%	1	13	12
Merlot	2774	12049	14823	15166	81%	98%	6	18	18
Muscat Brown (Red Front)	0	33	33	30	100%	110%	0	1	1
Nebbiolo	0	12	12	15	100%	80%	0	1	1
Other red	54	225	279	518	81%	54%	2	4	4
Petit Verdot	720	3595	4316	4297	83%	100%	3	16	14
Pinot Noir	243	700	943	1032	74%	91%	1	6	7
Rubired	163	134	297	298	45%	100%	2	4	5
Ruby Cabernet	1405	11311	12715	11043	89%	115%	6	17	17
Saint Macaire	0	52	52	0	100%		0	1	0
Sangiovese	88	519	607	414	86%	147%	2	6	4
Shiraz	11185	74202	85387	78546	87%	109%	8	22	22
Tarrango	0	998	998	1433	100%	70%	0	4	3
Tempranillo	0	37	37	75	100%	49%	0	2	2
Tinta Cao	66	0	66	0	0%		1	0	0
Tinta Molle	31	0	31	30	0%	104%	1	0	1
Touriga	154	64	218	85	29%	257%	2	2	1
Zante Currant	0	196	196	119	100%	165%	0	3	1
Total RED	26768	170132	196900	193680	86%	102%			

RIVERLAND TONNES CRUSHED BY VARIETY (WHITE) - VINTAGE 2001

Table 14.3 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
WHITE									
Biancone	768	220	988	650	22%	152%	1	3	2
Canada Muscat	0	168	168	100	100%	168%	0	2	1
Chardonnay	9710	41973	51683	56425	81%	92%	8	21	22
Chenin Blanc	580	4773	5353	5814	89%	92%	4	10	10
Colombard	747	13834	14581	14263	95%	102%	4	14	14
Crouchen	92	128	221	171	58%	129%	2	5	2
Doradillo	1793	1863	3656	2624	51%	139%	3	8	7
Emerald Riesling	0	113	113	110	100%	103%	0	1	1
Italia	0	34	34	35	100%	98%	0	1	1
Marsanne	0	2	2	0	100%		0	1	0
Merbein Seedless	0	173	173	0	100%		0	2	0
Muscadelle (Tokay)	59	254	313	240	81%	130%	1	4	3
Muscat Blanc (Frontignac)	545	465	1010	821	46%	123%	2	6	5
Muscat Gordo Bianco	2203	22777	24980	23271	91%	107%	3	9	8
Orange Muscat	0	1	1	10	100%	10%	0	1	1
Other white	9	238	247	247	96%	100%	1	5	5
Palomino	389	564	953	1050	59%	91%	2	8	8
Pedro Ximenes	0	322	322	350	100%	92%	0	5	5
Riesling	1580	1468	3048	3995	48%	76%	4	9	7
Sauvignon Blanc	1391	1299	2690	2917	48%	92%	6	6	6
Semillon	5070	4250	9320	8404	46%	111%	5	9	9
Sultana	9	5654	5663	7185	100%	79%	1	7	6
Sylvaner	458	379	837	1500	45%	56%	1	2	2
Taminga	18	326	344	243	95%	141%	1	5	3
Traminer	161	650	811	1350	80%	60%	3	4	6
Trebbiano	411	535	946	858	57%	110%	1	8	5
Unsound / distillation white	0	6	6	0	100%		0	1	0
Verdelho	610	865	1475	908	59%	162%	2	5	5
Viognier	119	55	174	336	32%	52%	1	2	3
Waltham Cross	0	91	91	8	100%	1088%	0	4	1
Total WHITE	26722	103482	130204	133886	79%	97%			
Grand Total	53490	273614	327104	327566					

RIVERLAND PRICE AND BAUME DATA (RED) - VINTAGE 2001

Table 14.4

Variety	weighted average weighbridge		weighted average baumé	lowest price**	highest price**	estimated total value	
	price*					purchased grapes	total grapes
Barbera	\$495	100%	14.4			\$11,890	\$11,890
Cabernet Franc	\$662	100%	13.6	\$500	\$755	\$82,680	\$82,680
Cabernet Sauvignon	\$753	95%	13.7	\$350	\$1,400	\$35,936,012	\$41,836,313
Carignan	\$428	100%	12.6			\$8,891	\$146,234
Carina	\$343	100%	13.7			\$69,808	\$69,808
Chambourcin	\$667	100%	13.3			\$70,058	\$70,058
Durif	\$661	100%	14.9			\$3,965	\$3,965
Grenache	\$616	94%	13.4	\$250	\$1,700	\$5,983,079	\$6,617,528
Malbec	\$567	100%	12.8	\$410	\$700	\$276,219	\$481,829
Mataro (Mouvedre)	\$654	95%	13.9	\$270	\$920	\$4,954,059	\$5,105,860
Merlot	\$769	91%	13.6	\$250	\$1,290	\$9,264,309	\$11,396,837
Muscat Brown (Red Front)	\$619	100%	15.1			\$20,437	\$20,437
Nebbiolo	\$513	100%	12.6			\$6,150	\$6,150
Other red	\$608	100%	12.2			\$137,065	\$169,752
Petit Verdot	\$746	85%	13.9	\$475	\$1,000	\$2,681,367	\$3,218,601
Pinot Noir	\$691	100%	10.8	\$615	\$780	\$483,775	\$651,757
Rubired	\$413	100%	13.1	\$300	\$514	\$55,552	\$122,737
Ruby Cabernet	\$723	97%	13.7	\$330	\$950	\$8,172,973	\$9,187,959
Saint Macaire	\$519	100%	13.6			\$26,966	\$26,966
Sangiovese	\$670	88%	12.8	\$510	\$749	\$347,871	\$406,855
Shiraz	\$812	95%	13.6	\$410	\$1,440	\$60,276,971	\$69,363,037
Tarrango	\$418	100%	10.9	\$300	\$470	\$417,555	\$417,555
Tempranillo	\$535	100%	12.8			\$19,788	\$19,788
Touriga	\$708	100%	14.1			\$45,521	\$154,584
Zante Currant	\$374	100%	14.9	\$280	\$415	\$73,354	\$73,354
Total RED						\$129,426,315	\$149,662,534

* 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.

RIVERLAND PRICE AND BAUME DATA (WHITE) - VINTAGE 2001

Table 14.5

Variety	weighted average weighbridge		weighted average baumé	lowest price**	highest price**	estimated total value		
	price*					purchased grapes	total grapes	
Biancone	\$254	100%	11.5	100%	\$220	\$285	\$55,869	\$250,967
Canada Muscat	\$516	100%	9.9	100%			\$86,611	\$86,611
Chardonnay	\$701	99%	13.2	96%	\$387	\$990	\$29,442,211	\$36,253,559
Chenin Blanc	\$369	100%	11.1	100%	\$220	\$550	\$1,760,518	\$1,974,407
Colombard	\$385	100%	11.7	99%	\$271	\$600	\$5,321,106	\$5,608,334
Crouchen	\$296	100%	12.2	100%	\$250	\$347	\$37,955	\$65,176
Doradillo	\$258	100%	11.5	100%	\$208	\$285	\$481,293	\$944,410
Emerald Riesling	\$339	100%	13.4	100%			\$38,436	\$38,436
Italia	\$318	100%	11.5	100%			\$10,940	\$10,940
Marsanne	\$320	100%	10.9	100%			\$640	\$640
Merbein Seedless	\$294	100%	11.0	100%			\$50,854	\$50,854
Muscadelle (Tokay)	\$373	100%	12.0	100%	\$300	\$460	\$94,729	\$116,718
Muscat Blanc (Frontignac)	\$341	100%	12.2	97%	\$280	\$425	\$158,559	\$344,461
Muscat Gordo Blanco	\$355	100%	13.0	100%	\$191	\$503	\$8,088,803	\$8,871,147
Orange Muscat	\$650	100%	12.5	100%			\$650	\$650
Other white	\$354	100%	11.6	47%	\$250	\$400	\$84,194	\$87,377
Palomino	\$254	100%	11.1	100%	\$230	\$285	\$143,471	\$242,452
Pedro Ximenes	\$250	100%	11.4	100%	\$230	\$285	\$80,567	\$80,567
Riesling	\$434	99%	11.0	99%	\$365	\$560	\$637,118	\$1,322,959
Sauvignon Blanc	\$456	100%	10.9	100%	\$350	\$515	\$592,360	\$1,226,597
Semillon	\$443	100%	11.2	93%	\$355	\$519	\$1,881,659	\$4,126,554
Sultana	\$313	100%	12.3	100%	\$240	\$340	\$1,767,504	\$1,770,318
Sylvaner	\$330	92%	11.0	92%			\$124,985	\$276,125
Taminga	\$322	100%	12.4	100%	\$273	\$423	\$104,858	\$110,652
Traminer	\$618	68%	12.4	68%	\$520	\$700	\$401,527	\$501,007
Trebbiano	\$280	100%	11.7	100%	\$220	\$312	\$150,023	\$265,201
Verdelho	\$550	100%	12.7	100%	\$415	\$710	\$475,922	\$811,369
Viognier	\$944	100%	14.0	100%			\$51,894	\$163,950
Waltham Cross	\$258	100%	12.2	100%	\$250	\$265	\$23,446	\$23,446
Total WHITE							\$52,149,782	\$65,626,963

* 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.

RIVERLAND ESTIMATED AND PREFERRED FUTURE INTAKE OF RED GRAPES 2002 TO 2006

Table 14.6

Variety	2002		2003		2004		2005		2006	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	36	20	41	25	51	35	51	35	51	35
Cabernet Franc	168	175	185	175	185	175	185	175	185	175
Cabernet Sauvignon	60297	57451	64630	61432	65704	62991	66009	63737	67767	66038
Carignan	346	270	346	270	346	270	311	270	276	270
Carina	47	47	47	47	47	47	47	47	47	47
Chambourcin	55	40	55	40	55	40	55	40	55	40
Cinsaut	100	100	0	0	0	0	0	0	0	0
Durif	12	15	16	20	25	25	31	25	31	25
Grenache	10839	15449	11367	15228	12190	15291	11540	15264	11597	15236
Malbec	995	907	986	907	957	907	939	907	927	907
Mataro (Mouvedre)	7675	9119	8236	9224	8427	9326	8567	9411	8610	9502
Merlot	17997	16601	19670	18014	20899	20321	21832	20700	22685	22040
Muscat Brown (Red Front)	34	30	34	30	34	30	34	30	34	30
Nebbiolo	17	20	19	20	19	20	19	20	19	20
Other red	1043	1047	1121	1057	1163	1067	1202	1074	1226	1074
Petit Verdot	6766	5287	8373	6264	9356	7011	10151	7988	10637	8778
Pinot Noir	1685	1726	2907	2896	3850	3886	4641	4636	4960	4946
Rubired	253	254	254	256	206	207	207	209	209	211
Ruby Cabernet	15951	13102	16683	14742	17097	15084	17171	15208	17376	15319
Saint Macaire	65	0	65	0	65	0	65	0	65	0
Sangiovese	605	421	650	475	737	527	714	527	714	527
Shiraz	87743	85329	90866	89869	93548	92866	95762	94971	97543	96955
Tarrango	786	687	798	701	335	266	350	282	366	301
Tempranillo	88	91	129	122	141	132	155	143	168	163
Tinta Cao	88	10	113	30	133	50	133	50	133	50
Tinta Molle	40	40	40	40	40	40	40	40	40	40
Touriga	234	94	210	96	211	96	213	98	213	98
Zante Currant	169	119	169	119	169	119	119	119	119	119
Zinfandel	9	10	14	15	14	15	14	15	14	15
Total RED	214144	208463	228025	222115	236005	230846	240559	236023	246069	242962

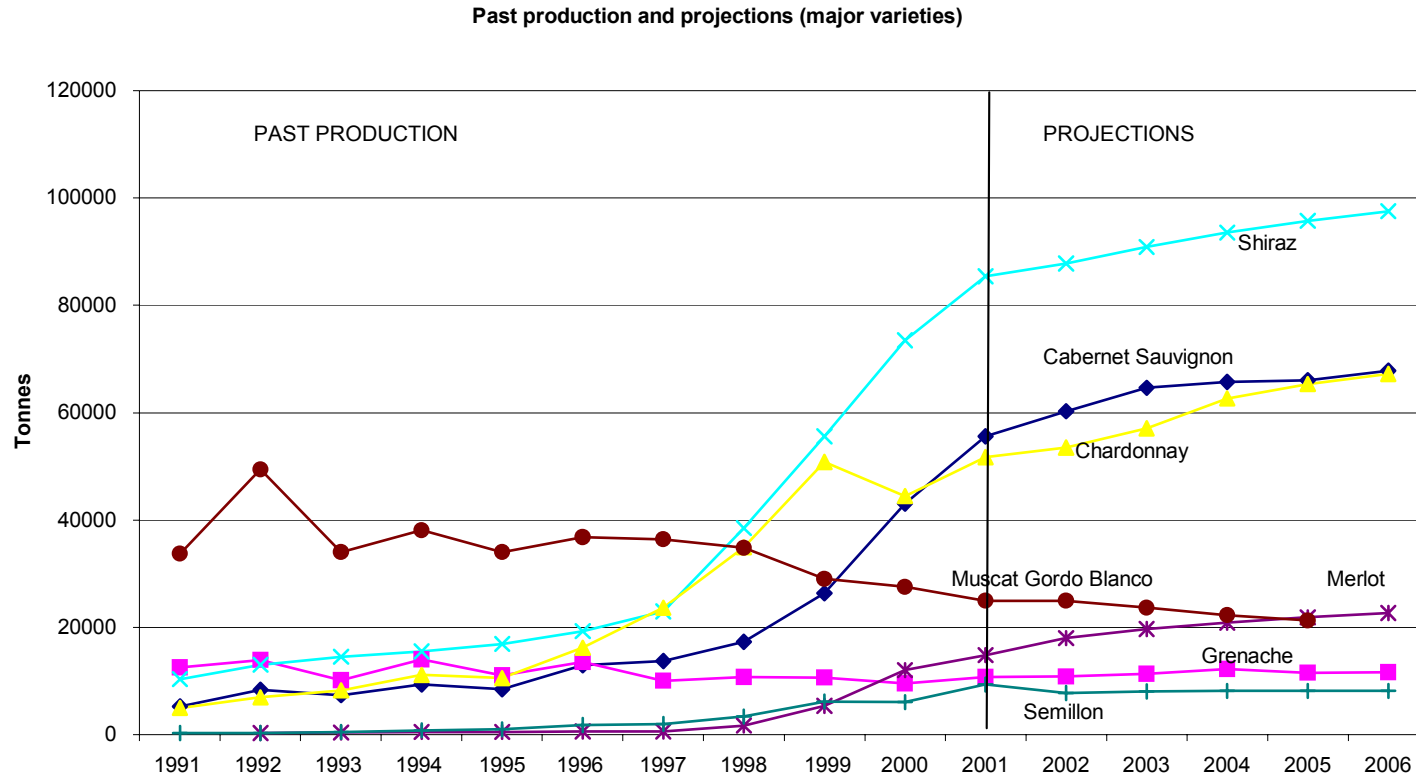
RIVERLAND ESTIMATED AND PREFERRED FUTURE INTAKE OF WHITE GRAPES 2002 TO 2006

Table 14.7

Variety	2002		2003		2004		2005		2006	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
WHITE										
Biancone	781	650	760	550	721	485	611	450	611	450
Canada Muscat	52	2	2	2	2	2	2	2	2	3
Chardonnay	53508	59104	57035	60638	62635	62629	65319	64639	67191	66739
Chenin Blanc	5723	5909	5752	5878	5765	5857	5762	5854	5765	5794
Colombard	19332	19102	22243	22258	25890	25638	27505	27835	28293	28374
Crouchen	198	171	177	171	162	171	144	171	144	171
Doradillo	2977	2600	2877	2500	2815	2300	2715	2200	2715	2100
Emerald Riesling	85	100	85	100	34	40	34	40	34	40
Italia	22	25	22	25	22	25	22	25	22	25
Merbein Seedless	104	0	90	0	0	0	0	0	0	0
Muscadelle (Tokay)	295	215	309	215	293	215	293	215	293	215
Muscat Blanc (Frontignac)	1003	848	936	900	914	952	883	1004	864	1056
Muscat Gordo Blanco	24932	23672	23678	23678	22276	23548	21227	23505	20960	23510
Orange Muscat	10	10	20	20	20	20	20	20	20	20
Other white	226	237	226	237	226	237	161	162	161	162
Palomino	1010	967	1003	968	988	961	928	858	928	857
Pedro Ximenes	317	350	317	350	271	330	231	270	231	270
Riesling	3509	4025	3390	4075	3426	4100	3439	4170	3530	4115
Sauvignon Blanc	2780	3445	2936	3445	3024	3345	3026	3345	3026	3445
Semillon	7785	7962	8055	8247	8168	8332	8185	8342	8106	8342
Sultana	7970	6841	7463	6841	7545	6841	7375	6841	7375	6841
Sylvaner	1845	1500	1845	1450	1845	1450	1845	1450	1845	1450
Taminga	212	180	176	180	176	180	176	180	176	180
Traminer	1046	1450	1049	1450	777	1450	777	1500	777	1550
Trebbiano	582	718	496	618	493	563	493	563	493	563
Verdelho	1991	773	2071	788	2090	863	2038	933	1846	938
Viognier	216	391	356	411	548	549	731	732	771	732
Waltham Cross	58	8	58	8	58	8	58	8	58	8
Total WHITE	138570	141255	143427	146003	151184	151091	154000	155315	156238	157950

RIVERLAND PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2006

Figure 14.1



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