

MCLAREN VALE VINTAGE OVERVIEW

Vintage report

Heavy winter rainfall gave vines a strong start to the season. Rain ceased to fall midway through October and it remained dry until the bulk of the fruit had been picked. Conditions were hot and dry from November until the end of February with some extremely hot extended periods in January and early February. Some growers were caught out letting their vines become moisture stressed during this period; large canopies were common and required more irrigation to prevent stress. Disease pressures were low all season.

Despite the hot conditions, crops were large in general with many people reporting substantially larger bunches than in previous years. Crops were much higher than in 2000 when yields were well down.

Hot periods ripened fruit quickly and fruit tended to be picked at high sugar levels. Whites that were not overcropped have produced good wines. Moderately cropped red fruit has produced good wines with high alcohol.

Overview of vintage statistics

The McLaren Vale crush of 55,872 tonnes was the highest of all the cool climate South Australian regions, overtaking the Barossa Valley for the first time. The increase was 60% over last year's low yielding vintage – a less dramatic increase than was seen in many regions. Against the trend, the Riesling crush was down by 25% on 2000, which may reflect vines having been pulled out or topworked.

Despite the record-breaking tonnages, there was still a slight shortfall in all the major varieties except Semillon.

The weighted average weighbridge prices for red and white varieties were generally up – although Shiraz was an exception. The average price paid for Cabernet Sauvignon was higher than that paid in Coonawarra, and the average Shiraz price was only \$20 below that paid in the Barossa Valley.

Projections indicate further growth of 30% in red varieties over the next five years, with demand still expected to exceed supply by 5,000 tonnes in 2006. On the other hand, white production is projected to decline slightly, but demand continues to increase, creating a shortfall of 3,000 tonnes in 2006.

Shiraz remains the dominant variety for the region, and in fact is set to increase its share of production over the forecast period, with more than twice the tonnage of Cabernet Sauvignon.

New plantings in the region were relatively high in 2000 – a further 292 hectares (7%) being planted (nearly all red). The total area is currently 5189 hectares, which means there is an estimated requirement for a further 700 hectares to be planted by 2003 to meet the projected demand in 2006 (see page 19 of this report).

MCLAREN VALE TONNES CRUSHED BY VARIETY - VINTAGE 2001

Table 11.1

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									
Barbera	11	0	11	12	0%	95%	2	0	2
Cabernet Franc	53	422	475	398	89%	119%	5	11	14
Cabernet Sauvignon	2419	8418	10837	12844	78%	84%	28	26	41
Chambourcin	29	0	29	29	0%	100%	1	0	1
Cinsaut	0	23	23	14	100%	170%	0	1	1
Grenache	1389	1889	3278	3255	58%	101%	17	21	28
Malbec	28	37	65	37	57%	175%	2	3	3
Mataro (Mouvedre)	85	25	110	64	22%	170%	4	4	5
Merlot	853	1894	2747	2757	69%	100%	20	19	31
Nebbiolo	20	24	44	30	55%	146%	3	1	4
Other red	0	9	9	7	100%	130%	0	1	1
Petit Verdot	115	123	238	224	52%	106%	5	6	8
Pinot Noir	117	1268	1385	1147	92%	121%	5	9	10
Ruby Cabernet	21	0	21	20	0%	103%	2	0	2
Sangiovese	97	73	170	140	43%	121%	4	3	7
Shiraz	5020	17631	22651	24271	78%	93%	30	31	48
Tempranillo	6	7	13	10	53%	135%	3	2	3
Total RED	10264	31841	42106	45259	76%	93%			
WHITE									
Chardonnay	1705	6569	8275	9261	79%	89%	21	20	33
Chenin Blanc	166	285	451	392	63%	115%	2	6	5
Colombard	0	14	14	14	100%	100%	0	1	1
Crouchen	0	19	19	19	100%	100%	0	1	1
Marsanne	11	56	67	67	84%	100%	1	1	1
Other white	1	15	16	25	94%	64%	1	2	3
Pedro Ximenes	32	61	93	72	65%	128%	1	2	2
Riesling	217	553	770	818	72%	94%	7	10	12
Roussanne	13	0	13	13	0%	100%	1	0	1
Sauvignon Blanc	248	942	1190	1055	79%	113%	9	17	21
Semillon	257	2370	2627	1892	90%	139%	11	17	23
Traminer	0	38	38	59	100%	64%	0	1	1
Verdelho	28	113	141	227	80%	62%	3	7	8
Viognier	27	28	55	56	51%	97%	1	2	2
Total WHITE	2704	11063	13767	13969	80%	99%			
Grand Total	12968	42904	55872	59228					

MCLAREN VALE PRICE AND BAUME DATA - VINTAGE 2001

Table 11.2

Variety	weighted average weighbridge price*		weighted average baumé		lowest price**	highest price**	estimated total value	
	price*						purchased grapes	total grapes
RED								
Cabernet Franc	\$1,349	85%	14.1	73%	\$900	\$2,050	\$568,612	\$640,121
Cabernet Sauvignon	\$1,936	75%	13.7	72%	\$1,225	\$2,971	\$16,292,862	\$20,975,480
Grenache	\$1,443	65%	13.9	46%	\$450	\$2,000	\$2,726,011	\$4,729,624
Malbec	\$1,835	44%	12.7	44%			\$67,857	\$118,943
Mataro (Mouvedre)	\$1,293	100%	15.0	9%	\$1,000	\$2,500	\$31,747	\$141,840
Merlot	\$1,851	68%	13.5	62%	\$1,355	\$3,000	\$3,506,322	\$5,086,432
Nebbiolo	\$1,333	100%					\$32,000	\$58,320
Petit Verdot	\$1,724	28%	13.6	25%	\$1,300	\$2,000	\$211,266	\$409,681
Pinot Noir	\$1,250	87%	11.1	87%	\$1,000	\$1,500	\$1,584,314	\$1,730,643
Sangiovese	\$1,298	98%					\$94,365	\$220,200
Shiraz	\$1,901	72%	14.0	65%	\$483	\$3,500	\$33,509,448	\$43,051,308
Tempranillo	\$2,232	29%					\$15,624	\$29,462
Total RED							\$58,640,428	\$77,192,056
WHITE								
Chardonnay	\$1,377	83%	13.2	77%	\$938	\$2,000	\$9,048,704	\$11,397,803
Chenin Blanc	\$664	96%	11.7	67%	\$525	\$800	\$189,257	\$299,506
Colombard	\$630	100%					\$8,546	\$8,546
Crouchen	\$750	100%					\$14,259	\$14,259
Doradillo	\$321	100%					\$1,603	\$1,603
Marsanne	\$1,826	100%					\$102,258	\$121,614
Pedro Ximenes	\$477	100%	12.0	40%			\$28,947	\$44,197
Riesling	\$890	85%	11.3	68%	\$500	\$1,155	\$491,905	\$684,875
Sauvignon Blanc	\$1,091	82%	12.0	68%	\$829	\$1,500	\$1,028,058	\$1,298,560
Semillon	\$975	82%	11.8	79%	\$672	\$1,300	\$2,311,579	\$2,561,979
Verdelho	\$1,498	72%	13.7	19%	\$925	\$2,400	\$169,344	\$210,848
Viognier	\$2,019	100%	14.3	30%			\$56,990	\$111,153
Total WHITE							\$13,451,450	\$16,754,942

* 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.

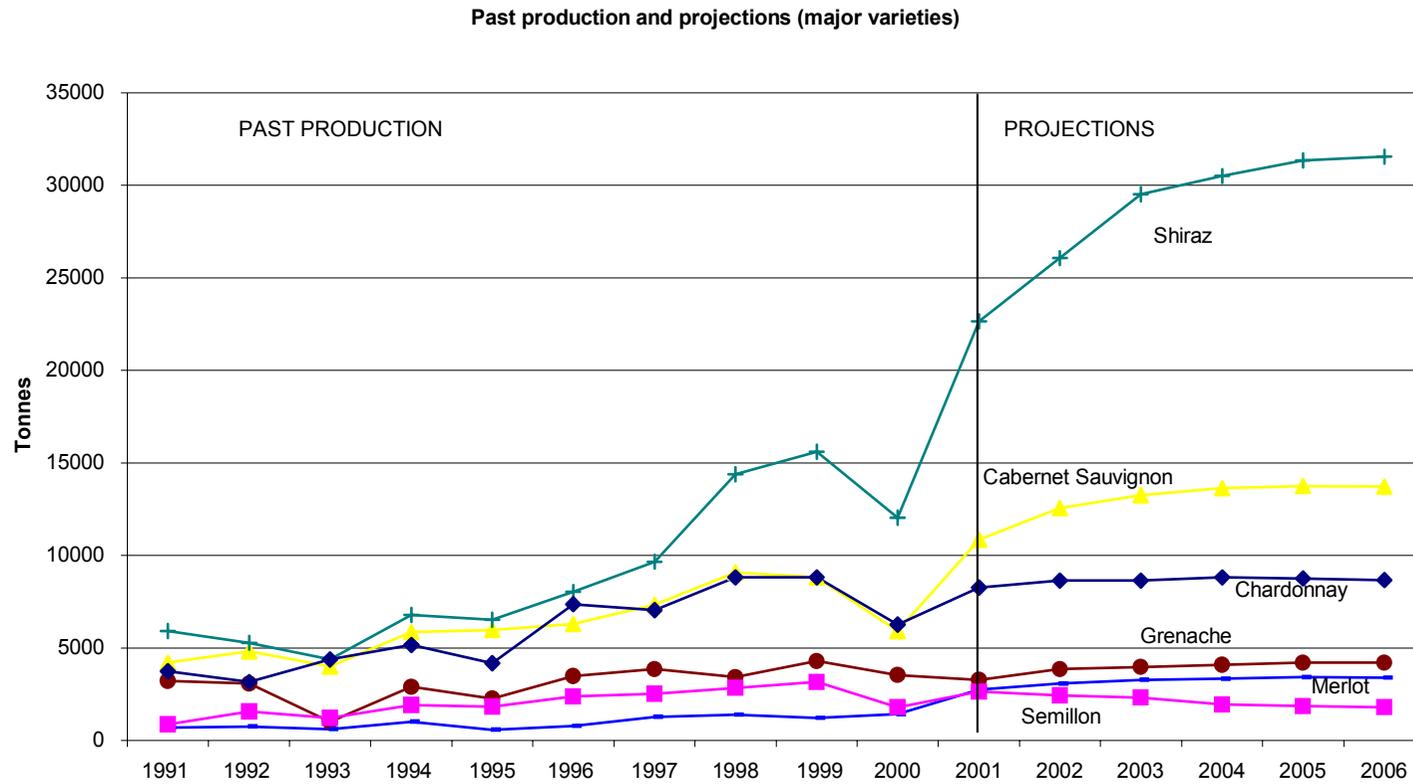
MCLAREN VALE ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2002 TO 2006

Table 11.3

Variety	2002		2003		2004		2005		2006	
	estimated	preferred								
RED										
Barbera	40	26	58	30	58	30	58	30	58	30
Cabernet Franc	621	478	626	483	563	473	568	473	568	478
Cabernet Sauvignon	12566	13758	13259	14726	13626	15340	13735	15822	13710	16183
Chambourcin	45	45	45	45	45	45	45	45	45	45
Cinsaut	20	0	20	0	20	0	20	0	20	0
Durif	1	7	3	7	5	10	10	15	15	15
Grenache	3864	3731	3970	3906	4097	3981	4218	4097	4202	4122
Malbec	107	103	120	98	135	107	144	116	154	126
Mataro (Mouvedre)	99	84	111	97	116	102	121	107	121	107
Merlot	3076	3177	3287	3509	3333	3720	3412	3889	3403	4002
Nebbiolo	72	47	89	73	132	106	136	110	146	120
Petit Verdot	451	391	558	473	590	535	626	571	626	571
Pinot Noir	1284	1119	1192	1139	1034	1148	1038	1153	1028	1161
Ruby Cabernet	36	36	36	36	36	36	36	36	36	36
Sangiovese	204	160	269	205	341	283	368	316	387	340
Shiraz	26075	27774	29530	31022	30496	31936	31350	33180	31548	34011
Tempranillo	51	39	99	74	139	113	166	142	166	142
Tinta Cao	0	0	4	5	8	10	15	15	15	15
Touriga	0	0	4	5	8	10	15	15	15	15
Total RED	48612	50976	53280	55934	54781	57985	56079	60132	56262	61518
WHITE										
Chardonnay	8629	9670	8655	10336	8801	10956	8751	11045	8673	11047
Chenin Blanc	406	370	391	380	391	380	374	390	374	390
Colombard	14	14	14	14	14	14	14	14	14	14
Crouchen	15	15	15	15	15	15	15	15	15	15
Marsanne	83	83	97	97	106	106	106	106	106	106
Muscadelle (Tokay)	2	0	2	0	2	0	2	0	2	0
Muscat Blanc (Frontignac)	25	5	25	5	25	5	25	5	25	5
Palomino	17	0	17	0	17	0	17	0	17	0
Pedro Ximenes	97	74	109	79	114	84	119	89	124	95
Riesling	818	664	734	665	744	655	766	657	787	658
Roussanne	84	84	98	98	106	106	106	106	106	106
Sauvignon Blanc	1383	1372	1334	1414	1152	1491	1194	1518	1234	1580
Semillon	2435	1828	2332	1864	1947	1932	1852	1957	1788	1992
Traminer	28	50	28	50	28	50	28	50	28	50
Verdelho	195	206	205	199	161	207	161	210	161	212
Viognier	29	37	64	65	96	90	113	95	113	95
Total WHITE	14259	14472	14119	15281	13718	16091	13642	16257	13566	16365

MCLAREN VALE PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2006

Figure 11.1



MCLAREN VALE PLANTINGS BY VARIETY

Table 11.4

Year planted - area in hectares

Variety	Pre-97	1997	1998	1999	2000	Total	% planted in 2000
RED WINEGRAPES							
BARBERA	-	0	1	0	8	9	86%
CABERNET FRANC	36	1	3	4	1	44	1%
CABERNET SAUVIGNON	797	91	90	62	55	1095	5%
GRENACHE	315	3	7	20	11	356	3%
MATARO	3	3	4	1	3	15	21%
MERLOT	139	37	23	43	8	249	3%
NEBBIOLO	-	-	2	4	2	8	20%
PETIT VERDOT	8	11	8	3	7	37	19%
PINOT NOIR	81	1	-	-	-	82	0%
SANGIOVESE	3	3	-	11	5	22	24%
SHIRAZ	1168	256	311	287	179	2201	8%
TEMPRANILLO	-	0	1	6	5	12	38%
OTHER RED	14	0	1	0	4	19	20%
TOTAL RED WINEGRAPES	2563	406	453	443	285	4150	7%
WHITE WINEGRAPES							
CHARDONNAY	567	8	1	2	-	579	0%
CHENIN BLANC	25	-	-	-	-	25	0%
RIESLING	93	-	0	-	-	93	0%
SAUVIGNON BLANC	113	3	1	0	1	118	1%
SEMILLON	136	1	-	-	-	137	0%
VERDELHO	6	7	3	3	4	22	16%
VIOGNIER	3	12	2	1	2	19	10%
OTHER WHITE	31	11	5	-	-	47	0%
TOTAL WHITE WINEGRAPES	974	42	12	6	6	1040	1%
TOTAL ALL VARIETIES	3537	447	465	449	292	5189	6%

Includes the hundreds of Noarlunga and Willunga.