

Coonawarra Wine Region

Regional summary report

2007



Coonawarra

Vintage overview

Vintage report

A low yielding vintage, with warm ripening conditions, resulted in good quality, clean fruit showing intense fruit characters with the potential for admirable quality wines. However, the yields across all varieties were well below average.

It was a difficult growing season with severe widespread spring frosts coupled with unusually dry spring and summer conditions. A drenching rainfall in early January revitalised the vines, restoring soil moisture, which allowed the vines to develop flavour and colour in the grapes.

Although flowering and set were slightly uneven, berry size remained small, and combined with the dry conditions, the red varieties matured the grapes with no disease pressures. Cabernet Sauvignon with strong flavour and spicy tannins is particularly pleasing. Merlot enjoyed the seasonal conditions and ripened beautifully with soft varietal expression and exceptional colour. Shiraz with flavour ripeness developed generous rich fruit.

All white varieties are showing a good balance of acid and fruit with elegant fruit characters, particularly Sauvignon Blanc, which enjoyed the benefit of cool nights and warm days in the lead-up to harvest and is displaying distinct varietal flavours and characteristics.

Coonawarra Grapegrowers' Association

Overview of vintage statistics

The harvest from Coonawarra was 17,026 tonnes in 2007, nearly 50% below 2006, and the lowest crop for the region for at least 15 years (since survey records started in 1993). The total value of grapes from the region decreased from \$28 million to \$22 million – a fall in value of only 21%. The average purchase value for Cabernet Sauvignon increased by \$560 per tonne (over 50%) due to the lack of supply.

New plantings in Coonawarra in spring 2006 (including top-working and replacements) were negligible for the second year in a row. However, as appears to be the case across South Australia, there is no indication of any significant removal of grapevines being undertaken.

The estimated production from the Coonawarra region for 2008 is 36,000 tonnes due to the after-effects of the severe frosts in 2006, and ongoing dry conditions. The wineries' committed intake is also around 36,000 tonnes, so there is not expected to be any surplus fruit. By 2012, assuming a return to normal growing conditions, the estimated production is 48,000 tonnes, of which 69% (33,000 tonnes) is already under contract or winery grown fruit. This leaves around 15,000 tonnes available on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Coonawarra

Winegrape intake summary – vintage 2007

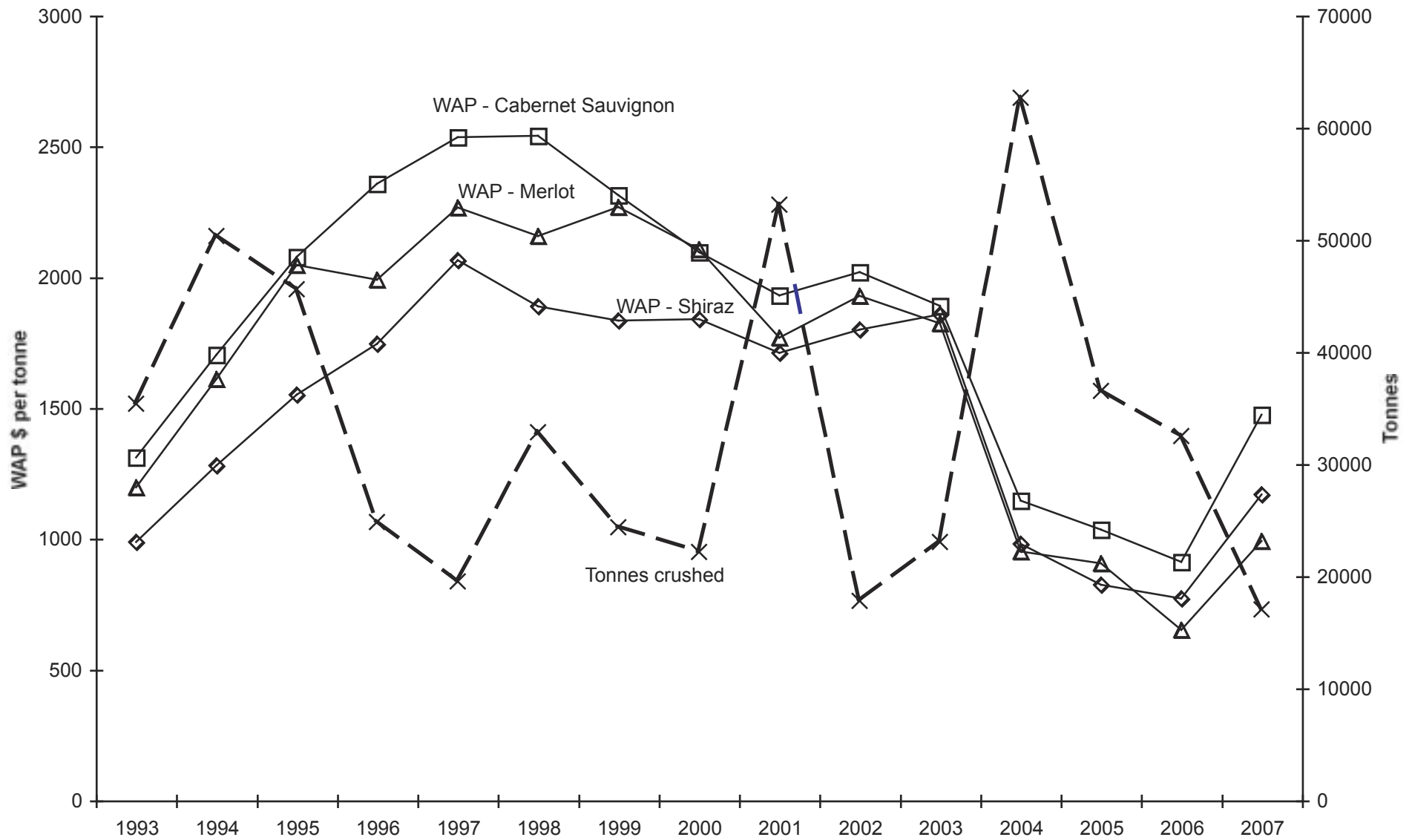
Variety	Tonnes purchased	Lowest price ¹	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	103			\$66,835	\$650	156	259	\$167,988
Cabernet Sauvignon	3,782	\$500	\$3,500	\$5,579,373	\$1,475	5,338	9,120	\$13,454,776
Malbec	9			\$8,352	\$900	92	101	\$91,260
Merlot	563	\$652	\$1,700	\$558,220	\$992	510	1,073	\$1,064,538
Other Red	1			\$385	\$550	18	19	\$10,247
Petit Verdot	106			\$110,066	\$1,042	6	112	\$116,412
Pinot Noir	12			\$10,285	\$857	123	135	\$115,681
Sangiovese	0					1	1	\$989
Shiraz	920	\$600	\$5,000	\$1,075,633	\$1,169	2,637	3,556	\$4,158,675
Total red winegrapes	5,495			\$7,409,149		8,881	14,376	\$19,181,153
WHITE								
Chardonnay	488	\$551	\$2,000	\$399,924	\$820	1,576	2,064	\$1,691,894
Other White	0					9	9	\$9,315
Riesling	0					276	276	\$275,978
Sauvignon Blanc	172	\$1,260	\$2,000	\$260,873	\$1,520	111	283	\$430,269
Semillon	1			\$341	\$550	2	3	\$1,551
Traminer	0					15	15	\$15,025
Viognier	0					1	1	\$1,002
Total white winegrapes	660			\$661,138		1,990	2,650	\$2,425,035
Total all winegrapes	6,155			\$8,070,287		10,871	17,026	\$21,606,188

¹ Lowest and highest prices paid are only reported where there are at least three purchasers



Coonawarra

Historical WAP vs tonnes crushed



Coonawarra

Current plantings and projected production 2008 - 2012

Variety	Current area in hectares by year planted						Estimated production 2008 - 2012				
	Pre-2004	2004	2005	2006	Total	% planted in 2006	2008	2009	2010	2011	2012
Red winegrapes											
Cabernet Franc	34	0	0	0	34	0%	206	274	274	274	274
Cabernet Sauvignon	3340	54	2	0	3396	0%	20202	27159	27166	27166	27166
Malbec	16	0	0	0	16	0%	95	126	126	126	126
Merlot	426	1	0	0	427	0%	2559	3416	3416	3416	3416
Other red	6	1	0	0	7	0%	37	53	53	53	53
Petit Verdot	22	0	0	0	22	0%	134	178	178	178	178
Pinot Noir	52	0	0	2	54	4%	312	417	425	425	425
Shiraz	1188	24	2	0	1214	0%	7199	9705	9713	9713	9713
Total red winegrapes	5084	80	4	2	5170	0%	30743	41328	41352	41352	41352
White winegrapes											
Chardonnay	415	17	0	0	432	0%	3387	4318	4318	4318	4318
Other white	7	0	0	1	8	13%	55	68	73	73	73
Riesling	143	3	0	0	146	0%	1153	1458	1458	1458	1458
Sauvignon Blanc	85	5	4	5	99	5%	699	920	966	966	966
Viognier	3	5	0	0	8	0%	42	78	78	78	78
Total white winegrapes	652	31	4	6	692	1%	5335	6843	6894	6894	6894
Total all varieties	5735	111	8	8	5862	0%	36078	48170	48246	48246	48246



Coonawarra

Estimated supply and committed intake 2008 - 2012

Variety	2008				2010				2012			
	Est Supply ¹	Winery grown grapes ²	Contract purchases ²	Un-contracted fruit ³	Est Supply ¹	Winery grown grapes ²	Contract purchases ²	Un-contracted fruit ³	Est Supply ¹	Winery grown grapes ²	Contract purchases ²	Un-contracted fruit ³
Red winegrapes												
Cabernet Franc	206	201	111	-107	274	201	103	-30	274	201	103	-30
Cabernet Sauvignon	20,202	12,032	8,653	-483	27,166	12,493	5,908	8,766	27,166	12,191	4,967	10,008
Malbec	95	60	19	16	126	76	0	50	126	97	0	29
Merlot	2,559	1,105	1,231	223	3,416	1,270	903	1,243	3,416	1,270	810	1,337
Other Red	37	27	11	-2	53	29	21	2	53	35	21	-3
Petit Verdot	134	22	114	-3	178	50	120	8	178	50	120	8
Pinot Noir	312	300	69	-56	425	216	22	187	425	317	22	86
Sangiovese	0	1	0	-1	0	1	0	-1	0	1	0	-1
Shiraz	7,199	5,460	2,109	-370	9,713	6,032	2,088	1,593	9,713	6,022	1,907	1,785
Tempranillo	0	11	0	-11	0	11	0	-11	0	11	0	-11
Total red winegrapes	30,743	19,220	12,317	-793	41,352	20,379	9,165	11,808	41,352	20,195	7,949	13,208
White winegrapes												
Chardonnay	3,387	2,049	1,125	212	4,318	2,219	1,037	1,062	4,318	2,269	900	1,149
Other White	55	0	0	55	73	0	0	73	73	0	0	73
Riesling	1,153	1,004	18	131	1,458	1,137	55	266	1,458	1,137	76	245
Sauvignon Blanc	699	258	323	119	966	316	226	424	966	372	211	383
Semillon	0	20	5	-25	0	12	5	-17	0	23	5	-28
Traminer	0	37	0	-37	0	37	0	-37	0	37	0	-37
Viognier	42	12	0	29	78	12	0	66	78	12	0	66
Total white winegrapes	5,335	3,380	1,471	483	6,894	3,733	1,323	1,838	6,894	3,850	1,192	1,852
Total all winegrapes	36,078	22,600	13,788	-310	48,246	24,112	10,488	13,645	48,246	24,044	9,142	15,060

¹ Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)

² A raising factor of 1.015 has been applied to these figures to allow for non-respondents

³ A negative number indicates supply forecast is below wineries' estimated commitment