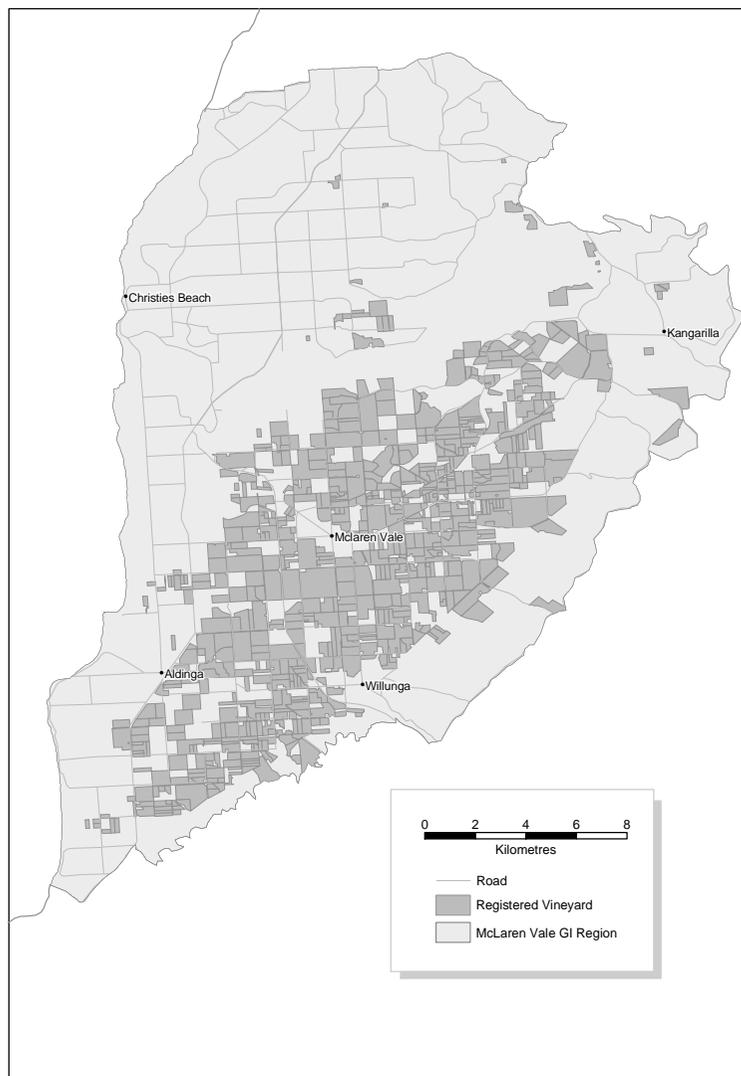


MCLAREN VALE VINTAGE OVERVIEW



Vintage report

2004 was a longer than usual vintage, attributed to cool conditions during ripening. It is expected that this will produce quality wines across both red and white wine styles.

Good winter and spring rainfall ensured good even budburst and enabled growers to maintain adequate soil moisture to ensure healthy grapevine canopies from veraison through to harvest, contributing to optimum flavour development. A warm dry November saw a rapid flowering period, which was followed by good berry set, and a quick even veraison. The coolest January in 12 years, followed by above average temperatures in February and dry conditions leading into harvest, optimised fruit flavours, sugar and acid levels. Despite two days in February above 44°C, shrivel and sunburn was minimal due to good canopies filtering the damaging effects of direct sunlight. As a result fruit condition at harvest was excellent.

Crop levels were up on previous seasons with a combination of good fruitfulness and many younger vineyards coming into full production, contributing to an increased yield. Despite this, the long ripening season took the pressure off fruit intake allowing wineries to schedule harvest when flavours and baume were at an optimum.

Winemakers' comments centred on sensational Cabernet Sauvignons and top end Shiraz attributed to fruit reaching full flavour ripeness, excellent colour, and tannin with wines exhibiting great varietal flavours and aromas. Overall the quality of white varieties impressed, with fruit harvested at lower baumes producing fantastic wines.

*Lucy Hyde, Viticulture Officer
McLaren Vale Grape Wine and Tourism*

Overview of vintage statistics

McLaren Vale produced a record 71,515 tonnes in 2004, making it the second largest producing region in the state after the Riverland, for only the second time. There was an 8,000 tonne surplus of red varieties – mainly Cabernet Sauvignon – while white varieties (less than 14,000 tonnes in total) were in balance.

The calculated average purchase value of the major red varieties dropped by around \$300 per tonne; however the income to growers from red varieties increased by 30% because of the increased tonnage. In white varieties, total income was up by 50%. The total value of grapes from the region increased from \$70 million in 2003 to \$98 million.

The forecast is for intake to stabilise at around 65,000 tonnes (below this year's crush), with a small shortfall in red varieties by 2009. Shiraz is set to remain by far the most important variety for the region, accounting for around 50% of the total intake.

There were 38 hectares of Shiraz and 37 hectares of Chardonnay planted in the region in 2003. Production estimates based on the current vineyard area and using yield estimates of 10 t/ha for reds and 11 t/ha for whites show a shortfall of nearly 3,000 tonnes between preferred intake of white varieties and potential production. On the other hand, there is an estimated surplus of 4,500 tonnes of red varieties. While demand forecasts change from year to year, this discrepancy may foreshadow some problems for growers without a contract in future years.

MCLAREN VALE CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 11.1

Current area in hectares by year planted

Variety	Pre-1999	1999	2000	2001	2002	2003	Total area	% planted in 2003
RED WINEGRAPES								
BARBERA	1	2	4	0	0	0	7	0%
CABERNET FRANC	27	3	1	0	0	0	31	0%
CABERNET SAUVIGNON	1055	170	27	48	18	5	1322	0%
GRENACHE	345	36	11	6	2	1	401	0%
MALBEC	9	0	0	0	0	0	9	0%
MATARO (MOUVEDRE)	11	1	3	2	3	0	21	0%
MERLOT	233	55	16	7	10	0	321	0%
NEBBIOLO	2	6	0	0	0	0	9	0%
PETIT VERDOT	27	15	14	13	0	2	71	3%
PINOT NOIR	79	7	0	0	0	0	86	0%
RUBY CABERNET	3	0	0	0	0	0	3	0%
SANGIOVESE	7	26	4	2	0	1	39	2%
SHIRAZ	2122	451	194	234	115	38	3154	1%
TEMPRANILLO	2	9	2	7	1	1	22	3%
OTHER RED	6	0	4	2	0	1	14	8%
TOTAL RED WINEGRAPES	3927	782	278	322	150	49	5508	1%
WHITE WINEGRAPES								
CHARDONNAY	602	4	0	17	30	37	690	5%
CHENIN BLANC	20	0	0	0	4	0	23	0%
MARSANNE	12	0	0	1	0	0	14	0%
RIESLING	83	0	0	3	0	0	86	0%
ROUSSANNE	8	0	0	2	0	0	9	0%
SAUVIGNON BLANC	102	0	1	2	3	7	114	6%
SEMILLON	132	0	0	1	0	0	133	0%
VERDELHO	14	3	5	0	0	0	21	0%
VIOGNIER	24	1	7	4	2	2	39	5%
OTHER WHITE	10	0	0	0	2	0	12	0%
TOTAL WHITE WINEGRAPES	1007	8	12	30	40	45	1142	4%
ROOTSTOCK BLOCK	1	3	0	0	0	0	4	0%
TOTAL ALL VARIETIES	4936	793	291	351	190	94	6654	1%



MCLAREN VALE TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 11.2

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	Other	Preferred
RED									
Barbera	35	0	35	36	0%	96%	4	0	4
Cabernet Franc	54	298	352	187	85%	188%	5	10	10
Cabernet Sauvignon	3845	9978	13823	10559	72%	131%	35	36	49
Grenache	1285	2425	3709	3495	65%	106%	17	23	31
Malbec	64	6	69	66	8%	105%	3	2	5
Mataro (Mouvedre)	167	22	190	271	12%	70%	5	4	7
Merlot	1106	1971	3077	2638	64%	117%	21	22	32
Nebbiolo	68	9	77	70	11%	109%	4	1	5
Other red	91	20	112	152	9%	53%	4	1	6
Petit Verdot	252	357	609	437	59%	139%	7	9	10
Pinot Noir	138	1113	1252	1330	89%	94%	5	7	8
Sangiovese	244	90	334	294	27%	114%	8	6	10
Shiraz	8248	25518	33767	29798	76%	113%	34	47	57
Tempranillo	123	29	153	136	19%	112%	5	5	7
Zinfandel	3	11	14	20	78%	70%	1	1	1
Total RED	15724	41848	57571	49487	73%	116%			
WHITE									
Chardonnay	2024	5717	7741	7446	74%	104%	26	26	38
Chenin Blanc	128	247	375	341	66%	110%	2	7	6
Marsanne	56	106	162	153	65%	106%	2	1	2
Other white	14	31	45	66	23%	78%	1	1	2
Pedro Ximenes	35	13	48	48	27%	100%	1	1	2
Riesling	333	633	966	968	66%	100%	9	9	12
Roussanne	49	0	49	104	0%	48%	2	0	2
Sauvignon Blanc	625	870	1495	1479	58%	101%	16	14	24
Semillon	376	2080	2456	2220	85%	111%	10	15	21
Traminer	0	38	38	37	100%	101%	0	2	2
Verdelho	138	87	225	249	39%	90%	5	2	6
Viognier	109	235	343	337	68%	102%	5	5	7
Total WHITE	3888	10055	13943	13447	72%	104%			
Total for region	19612	51903	71515	62935					

MCLAREN VALE CROP VALUE DATA - VINTAGE 2004

Table 11.3

Variety	Grower grown	Total crushed (1)	estimated total value		lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
			purchased grapes	total grapes				
RED								
Cabernet Franc	298	352	\$263,498	\$311,678	\$300	\$1,660	\$885	100%
Cabernet Sauvignon	9978	13823	\$12,944,024	\$17,931,554	\$200	\$3,934	\$1,297	97%
Cinsaut	17	17	\$10,212	\$10,212			\$600	100%
Grenache	2425	3709	\$3,064,287	\$4,687,814	\$300	\$3,000	\$1,264	97%
Malbec	6	69	\$9,794	\$122,566			\$1,762	100%
Mataro (Mouvedre)	22	190	\$33,196	\$281,598	\$1,150	\$2,250	\$1,485	100%
Merlot	1971	3077	\$2,421,891	\$3,780,746	\$481	\$2,863	\$1,229	95%
Nebbiolo	9	77	\$11,900	\$107,156			\$1,400	100%
Other red	3	40	\$6,840	\$79,867			\$2,012	100%
Petit Verdot	357	609	\$446,774	\$762,816	\$650	\$1,675	\$1,253	100%
Pinot Noir	1113	1252	\$1,172,567	\$1,318,334	\$300	\$1,500	\$1,053	100%
Sangiovese	90	334	\$118,901	\$439,192	\$900	\$1,500	\$1,315	91%
Shiraz	25518	33767	\$37,971,147	\$50,244,682	\$350	\$3,900	\$1,488	97%
Tempranillo	29	153	\$44,529	\$231,811	\$1,000	\$2,400	\$1,520	100%
Tinta Cao	0	6	\$682	\$13,382			\$2,272	100%
Zinfandel	11	14	\$20,596	\$26,448			\$1,900	100%
Total RED	41848	57487	\$58,540,838	\$80,349,856				
WHITE								
Chardonnay	5717	7741	\$8,057,144	\$10,910,104	\$500	\$2,000	\$1,409	100%
Chenin Blanc	247	375	\$197,546	\$300,077	\$350	\$1,000	\$800	100%
Colombard	15	15	\$9,267	\$9,267			\$630	100%
Marsanne	106	162	\$190,872	\$291,710			\$1,801	100%
Muscadelle (Tokay)	2	2	\$891	\$891			\$550	100%
Muscat Blanc (Frontignac)	12	20	\$5,960	\$9,920			\$500	100%
Muscat Gordo Blanco	2	8	\$1,150	\$5,111			\$639	100%
Pedro Ximenes	13	48	\$7,188	\$26,542			\$553	100%
Riesling	633	966	\$750,946	\$1,146,186	\$700	\$1,400	\$1,187	100%
Sauvignon Blanc	870	1495	\$1,008,100	\$1,731,668	\$611	\$2,000	\$1,158	100%
Semillon	2080	2456	\$1,764,129	\$2,083,291	\$450	\$1,400	\$848	100%
Traminer	38	38	\$30,398	\$30,398			\$805	100%
Verdelho	87	225	\$94,302	\$244,279			\$1,084	100%
Viognier	235	343	\$427,425	\$625,617	\$1,600	\$2,000	\$1,822	100%
Total WHITE	10055	13894	\$12,545,318	\$17,415,062				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.



MCLAREN VALE ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 11.4

Variety	2005		2006		2007		2008		2009	
	estimated	preferred								
RED										
Barbera	48	48	59	58	62	60	63	61	63	61
Cabernet Franc	236	213	222	199	223	201	164	161	164	164
Cabernet Sauvignon	13060	10783	11873	9846	11671	10188	10418	9246	10364	9279
Chambourcin	30	30	30	30	30	30	30	30	30	30
Durif	3	5	5	5	5	5	6	8	6	10
Grenache	4183	3659	4468	4414	4547	4557	4746	4760	4749	4768
Malbec	72	73	64	64	63	63	63	63	63	63
Mataro (Mouvedre)	141	151	146	156	153	163	155	165	155	165
Merlot	2876	2615	2694	2445	2658	2540	2450	2438	2467	2521
Nebbiolo	100	98	100	98	100	98	100	97	101	98
Other red	106	137	112	38	122	152	64	93	69	93
Petit Verdot	619	449	630	442	619	442	475	330	461	316
Pinot Noir	792	837	943	951	907	926	919	919	919	919
Sangiovese	351	324	406	371	413	375	338	378	338	378
Shiraz	32345	29975	29536	28846	28970	29975	28098	30955	27102	31397
Tempranillo	197	181	207	191	201	189	132	186	117	186
Zinfandel	20	30	27	40	40	40	40	40	40	40
Total for RED	55178	49608	51523	48303	50782	50004	48261	49930	47206	50488
WHITE										
Chardonnay	8579	8058	8358	7689	8802	8036	10140	9331	10152	9332
Chenin Blanc	299	304	320	270	280	280	290	290	300	300
Colombard	15	15	15	15	16	16	16	16	18	18
Marsanne	155	155	160	160	160	160	160	160	160	160
Muscadelle (Tokay)	10	10	10	10	10	10	10	10	10	10
Muscat Blanc	26	26	26	26	26	26	26	26	26	26
Muscat Gordo Blanco	10	10	10	10	10	10	10	10	10	10
Pedro Ximenes	43	48	43	48	43	48	43	48	43	48
Pinot Gris	0	18	0	17	0	17	0	16	0	16
Riesling	1033	1028	974	989	964	979	898	913	880	895
Roussanne	75	105	110	110	110	110	110	110	110	110
Sauvignon Blanc	1603	1766	1650	1830	1731	2013	1807	2093	1807	2093
Semillon	2079	1898	1514	1354	1481	1325	1471	1314	1475	1319
Traminer	40	40	328	328	342	342	356	356	356	356
Verdelho	348	345	244	241	258	254	225	247	225	252
Viognier	289	349	292	354	292	360	292	361	292	361
Total for WHITE	14604	14175	14053	13451	14525	13986	15854	15301	15864	15306
Total for region	69782	63783	65576	61754	65307	63990	64115	65231	63070	65794

MCLAREN VALE PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2009

Figure 11.1

Past production and projections (major varieties)

