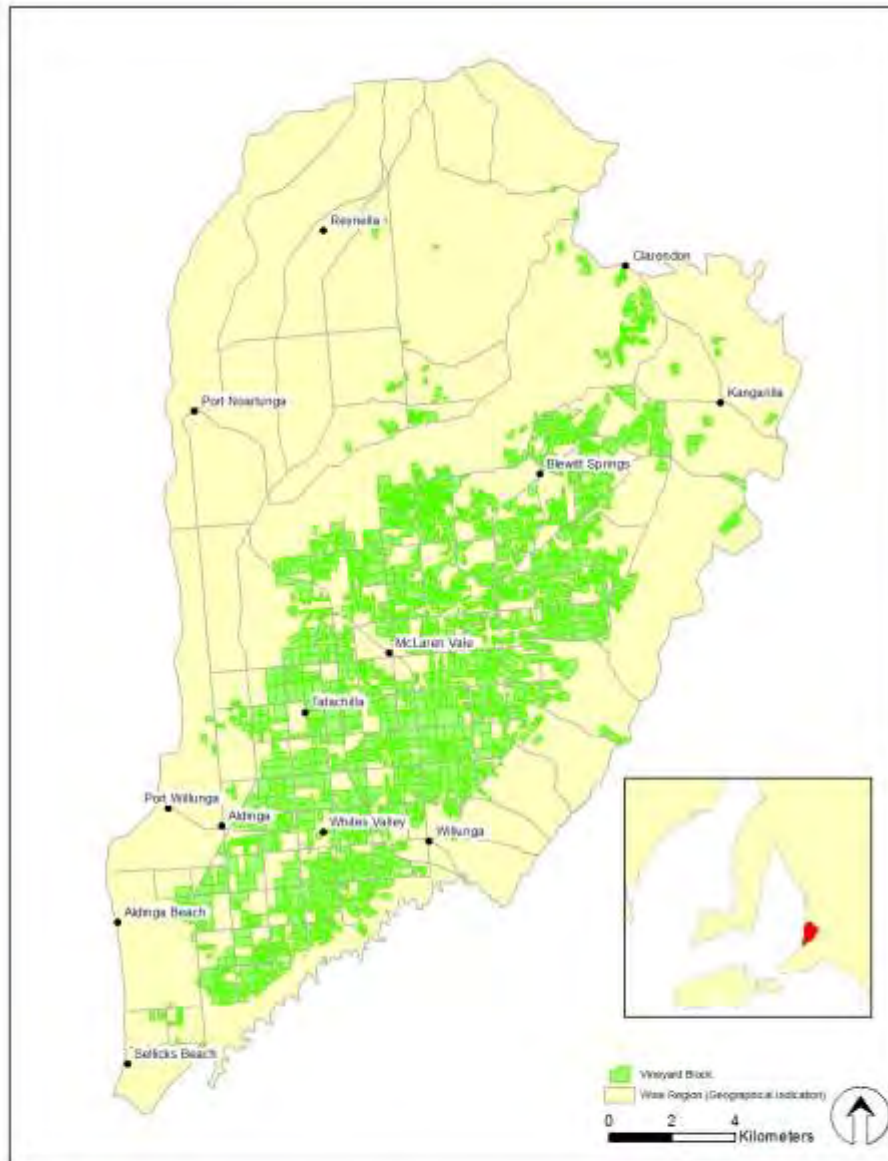


# SA Winegrape Crush Survey Regional Summary Report - 2013

## McLaren Vale Wine Region



DATUM: GDA94  
PROJECTION: MGA Zone 54  
DATE: 30 July 2013  
SOFTWARE: ESRI ArcGIS v10.1  
DATA SOURCE:  
Vineyard Blocks - PGIBSA  
Wine Regions - Wine Australia  
Locations - SA Gazetteer  
Roads - GDE

McLaren Vale  
Wine Region



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## McLaren Vale

## Vintage overview

### *Vintage report*

The 2013 vintage has been completed earlier than expected in McLaren Vale. The season was successful with no rain interrupting the quick harvest. Harvesting grapes was completed by the end of March. With all of the fruit safely into wineries by Easter, the industry is now grateful for a holiday break.

Chardonnay was harvested from the middle of February with Shiraz beginning at the end of February. By the first week of March a large percentage of the district had already been harvested. Harvested yields were 10-30% down from what was expected.

As well as being dry, there was effectively no rainfall for three months from December; it was also notable for being a warm summer. In the background it was officially announced to be the warmest summer experienced in Australia since records began and this explains the rapid ripening seen locally.

The weather presented some challenges, but also had some advantages, disease levels were the lowest for many years and fruit was very clean. Demand for McLaren Vale fruit was high, due to low crops which are typical in dry seasons, but also because of the regions reputation for consistent quality.

Winery demand was led by the classic red grape varieties Shiraz and Cabernet Sauvignon. There was also interest in Grenache and Mourvèdre which are varieties that suited by warm and dry weather.

The average prices for McLaren Vale fruit is expected to increase in response to this demand when final tallies are calculated.

The McLaren Vale vintage was light in crop, but of very good quality. Grape bonus payments based on that quality will help make up for some shortfalls in grape growers returns from lower than expected tonnages.

At this early stage the wine quality is looking very promising with the reds having excellent colour and flavour. The rapid and early harvesting tested many winemakers experience in juggling which vineyards to pick immediately and which grapes to keep on the vine to improve. When picked just right, the results will rank highly compared against previous vintages that have earned McLaren Vale its reputation.

*James Hook*  
*McLaren Vale Crop Watch Editor*

### *Overview of vintage statistics*

The harvest from McLaren Vale was 35,229 tonnes in 2013, up by 3,474 tonnes (10.9%) from the 2012 harvest of 31,755 tonnes. The total value of the grapes increased from \$39.7 million to \$48.7 million. The average purchase value increased for all major varieties. Of the red varieties – Shiraz up by \$203 per tonne to \$1,677 per tonne; Cabernet Sauvignon up by \$128 per tonne to \$1,360 per tonne and Grenache up by \$127 per tonne to \$1,359 per tonne. Of the white varieties – Chardonnay is up by \$30 per tonne to \$592 per tonne.

There were 87 hectares of new plantings in McLaren Vale in spring 2012 (including top-working and replacements) compared with 52 hectares planted in 2011. Shiraz accounted for 42.5% of the new plantings and Cabernet Sauvignon 18.4%. The total planted area of vines in the region decreased slightly to 7,463 hectares.

The estimated production from McLaren Vale for 2014 is 58,500 tonnes, with the wineries' committed intake being 41,700 tonnes. This leaves around 16,800 tonnes (28.7%) of uncommitted fruit.

In 2018, the estimated production is 59,000 tonnes, of which 37,000 tonnes is already under contract or winery grown fruit. This leaves an estimated 22,000 tonnes (37.3%) yet to be contracted or is available on the open market.

Variety	Tonnes purchased	Lowest price <sup>1</sup>	Highest price <sup>1</sup>	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed <sup>2</sup>	Est total value ALL grapes
<b>RED</b>								
Cabernet Franc	53	\$1,000	\$1,200	\$60,314	\$1,128	6	59	\$66,516
Cabernet Sauvignon	3,305	\$700	\$5,586	\$4,493,508	\$1,360	2,290	5,595	\$7,607,271
Carignan	0			\$1,068	\$2,500	0	0	\$1,068
Grenache	1,439	\$400	\$4,000	\$1,956,368	\$1,359	1,013	2,453	\$3,333,687
Malbec	16			\$27,285	\$1,707	19	34	\$58,873
Mataro	208	\$653	\$4,000	\$305,211	\$1,466	167	375	\$549,961
Merlot	985	\$600	\$2,200	\$964,038	\$979	737	1,722	\$1,685,728
Muscat A Petit Grains Rose	0			\$0	\$0	0	0	\$457
Nebbiolo	0			\$0	\$0	12	12	\$18,270
Other red	122	\$680	\$2,500	\$172,515	\$1,416	125	247	\$349,520
Petit Verdot	171	\$600	\$1,200	\$152,368	\$893	254	424	\$378,848
Pinot Noir	344	\$700	\$1,200	\$323,498	\$941	94	438	\$412,290
Ruby Cabernet	0			\$0	\$0	9	9	\$13,703
Sangiovese	61	\$1,100	\$1,700	\$87,139	\$1,433	116	177	\$253,081
Shiraz	10,966	\$800	\$8,500	\$18,388,345	\$1,677	6,485	17,451	\$29,261,947
Tempranillo	156	\$800	\$2,500	\$216,949	\$1,391	88	244	\$338,964
Touriga	10			\$7,878	\$751	1	12	\$8,846
Zinfandel	6			\$9,285	\$1,500	0	6	\$9,285
<b>Total Red winegrapes</b>	<b>17,843</b>			<b>\$27,165,768</b>		<b>11,415</b>	<b>29,258</b>	<b>\$44,348,313</b>

<sup>1</sup> Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.

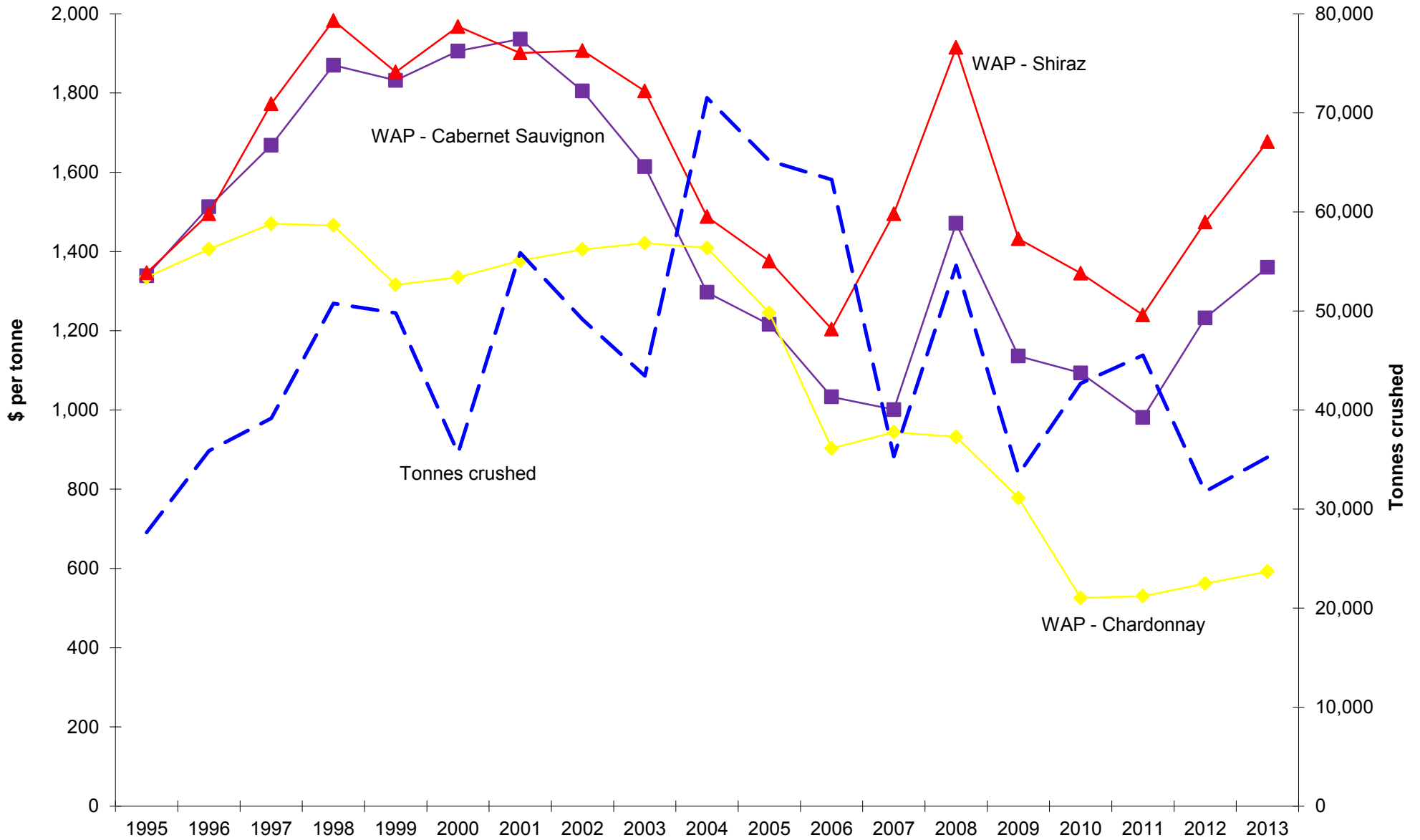
<sup>2</sup> It is estimated that the non-response rate for McLaren Vale is 18.9%.

Variety	Tonnes purchased	Lowest price <sup>1</sup>	Highest price <sup>1</sup>	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed <sup>2</sup>	Est total value ALL grapes
<b>WHITE</b>								
Chardonnay	2,621	\$330	\$1,650	\$1,552,694	\$592	900	3,520	\$2,085,825
Chenin Blanc	14			\$19,264	\$1,400	70	84	\$117,754
Marsanne	64			\$73,775	\$1,151	34	98	\$112,985
Muscat A Petit Grains Blanc	0			\$0	\$0	7	7	\$4,952
Muscat Gordo Blanco	0			\$0	\$0	4	4	\$3,213
Other white	41	\$1,100	\$1,800	\$61,307	\$1,503	25	66	\$98,571
Pedro Ximenes	0			\$0	\$0	19	19	\$13,872
Pinot Gris	60			\$49,232	\$825	114	173	\$143,090
Riesling	112	\$300	\$1,350	\$106,362	\$953	75	187	\$178,246
Roussanne	53	\$977	\$2,500	\$68,091	\$1,276	25	78	\$99,632
Sauvignon Blanc	683	\$500	\$2,000	\$630,453	\$924	250	932	\$861,267
Semillon	240	\$300	\$1,000	\$141,695	\$591	173	413	\$243,802
Traminer	12			\$6,000	\$500	0	12	\$6,000
Verdelho	92	\$1,270	\$1,813	\$158,941	\$1,721	7	99	\$170,985
Viognier	165	\$350	\$2,500	\$165,940	\$1,008	113	278	\$279,951
<b>Total White winegrapes</b>	<b>4,155</b>			<b>\$3,033,753</b>		<b>1,816</b>	<b>5,971</b>	<b>\$4,420,144</b>
<b>Grand Total All winegrapes</b>	<b>21,998</b>			<b>\$30,199,521</b>		<b>13,231</b>	<b>35,229</b>	<b>\$48,768,457</b>

*1 Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.*

*2 It is estimated that the non-response rate for McLaren Vale is 18.9%.*

Historical Weighted Average Price vs tonnes crushed



# McLaren Vale

## Current plantings by variety and year planted

Variety	Current area in hectares					Total area	% planted in 2012
	Pre-2010	2010	2011	2012			
<b>Red winegrapes</b>							
Barbera	14	0	0	0	14	0%	
Cabernet Franc	28	0	0	0	28	0%	
Cabernet Sauvignon	1,259	6	12	16	1,293	1%	
Grenache	443	4	2	6	456	1%	
Mataro (Mourvedre)	60	4	2	7	73	10%	
Merlot	265	0	0	0	266	0%	
Other Red	56	5	9	9	80	12%	
Petit Verdot	54	0	0	0	54	0%	
Pinot Noir	68	0	0	0	68	0%	
Sangiovese	51	4	0	0	54	0%	
Shiraz	3,776	7	12	37	3,832	1%	
Tempranillo	35	10	9	3	58	6%	
<b>Total red varieties</b>	<b>6,109</b>	<b>40</b>	<b>47</b>	<b>79</b>	<b>6,275</b>	<b>1%</b>	
<b>White winegrapes</b>							
Chardonnay	521	0	0	0	521	0%	
Chenin Blanc	21	0	2	0	23	0%	
Marsanne	12	0	0	0	12	0%	
Muscat A Petit Grains Blanc	9	1	0	4	13	27%	
Other White	24	2	8	2	36	5%	
Pinot Gris	22	0	0	0	22	0%	
Riesling	43	0	2	0	46	0%	
Sauvignon Blanc	109	0	0	0	109	0%	
Savagnin	8	0	0	0	8	0%	
Semillon	72	0	0	0	72	0%	
Verdelho	19	0	0	0	19	0%	
Vermentino	6	0	0	2	9	22%	
Viognier	73	0	0	0	74	0%	
<b>Total white varieties</b>	<b>940</b>	<b>3</b>	<b>12</b>	<b>7</b>	<b>962</b>	<b>1%</b>	
Rootstock Block	4	0	0	0	4	0%	
Multi-purpose white	3	0	0	0	3	0%	
Unknown variety	218	0	0	0	218	0%	
<b>Total all varieties</b>	<b>7,274</b>	<b>43</b>	<b>59</b>	<b>87</b>	<b>7,463</b>	<b>1%</b>	

McLaren Vale

Estimated supply and committed intake 2014 - 2018

Variety	2014				2016				2018			
	Est Supply <sup>1</sup>	Committed intake <sup>2</sup>			Est Supply <sup>1</sup>	Committed intake <sup>2</sup>			Est Supply <sup>1</sup>	Committed intake <sup>2</sup>		
		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake
<b>Red winegrapes</b>												
Cabernet Franc	255	7	127	134	255	7	85	92	255	7	62	69
Cabernet Sauvignon	7,614	3,263	4,287	7,550	7,686	3,274	3,946	7,221	7,686	3,318	3,738	7,056
Carignan	0	0	2	2	0	0	2	2	0	0	2	2
Grenache	4,028	1,108	1,340	2,449	4,071	1,118	1,293	2,411	4,071	1,075	1,295	2,370
Malbec	0	12	5	16	0	12	5	16	0	12	5	16
Mataro	572	181	255	437	619	188	228	417	619	191	228	419
Merlot	2,386	897	1,273	2,170	2,389	709	1,086	1,796	2,389	680	1,110	1,790
Nebbiolo	0	16	0	16	0	16	0	16	0	16	0	16
Other red	1,704	169	200	369	1,778	185	133	318	1,778	194	133	327
Petit Verdot	489	252	108	360	489	280	71	351	489	280	71	351
Pinot Noir	610	162	315	477	610	162	33	196	610	162	33	196
Ruby Cabernet	0	13	0	13	0	13	0	13	0	13	0	13
Sangiovese	479	160	69	229	488	161	35	196	488	65	46	111
Shiraz	30,294	8,561	12,383	20,944	30,479	8,406	10,785	19,191	30,479	8,162	10,442	18,604
Tempranillo	420	119	206	325	479	119	176	295	479	86	176	262
Touriga	0	1	25	27	0	1	14	15	0	1	0	1
Zinfandel	0	0	9	9	0	0	9	9	0	0	9	9
<b>Total red winegrapes</b>	<b>48,853</b>	<b>14,922</b>	<b>20,605</b>	<b>35,527</b>	<b>49,343</b>	<b>14,652</b>	<b>17,903</b>	<b>32,555</b>	<b>49,343</b>	<b>14,262</b>	<b>17,351</b>	<b>31,612</b>
<b>White winegrapes</b>												
Chardonnay	4,166	953	2,791	3,744	4,166	792	2,724	3,517	4,166	597	2,627	3,224
Chenin Blanc	263	80	15	95	267	80	15	95	267	11	15	26
Marsanne	147	40	75	114	147	40	75	114	147	40	75	114
Muscat A Petit Grains Blanc	114	9	0	9	138	10	0	10	138	10	0	10
Muscat Gordo Blanco	0	8	0	8	0	10	0	10	0	12	0	12
Other white	1,762	29	80	109	1,811	39	88	127	1,811	42	67	109
Pedro Ximenes	0	23	0	23	0	23	0	23	0	23	0	23
Pinot Gris	260	124	69	193	260	124	69	193	260	67	69	136
Riesling	356	81	112	193	360	81	112	193	360	81	112	193
Roussanne	138	28	60	89	138	28	60	89	138	28	60	89
Sauvignon Blanc	870	290	568	858	870	291	568	859	870	235	568	803
Semillon	719	161	166	327	719	75	166	241	719	46	166	212
Traminer	0	0	13	13	0	0	13	13	0	0	13	13
Verdelho	225	8	104	112	225	8	104	112	225	8	104	112
Viognier	587	138	138	277	588	138	138	277	588	138	138	277
<b>Total white winegrapes</b>	<b>9,607</b>	<b>1,974</b>	<b>4,190</b>	<b>6,164</b>	<b>9,689</b>	<b>1,741</b>	<b>4,131</b>	<b>5,872</b>	<b>9,689</b>	<b>1,338</b>	<b>4,014</b>	<b>5,351</b>
<b>All winegrapes</b>	<b>58,459</b>	<b>16,896</b>	<b>24,795</b>	<b>41,691</b>	<b>59,032</b>	<b>16,393</b>	<b>22,034</b>	<b>38,427</b>	<b>59,032</b>	<b>15,599</b>	<b>21,364</b>	<b>36,964</b>

<sup>1</sup> Supply forecast produced by PGIBSA based on the South Australian vineyard register

<sup>2</sup> A raising factor of 1.027 has been applied to committed intake to allow for non-respondents