

McLaren Vale wine region

Regional summary report

2008

Vintage report

Over the past five seasons, vintage has become shorter and has commenced earlier. Conditions in the last two seasons have also been drier than average. Predictive data on climate change suggests a trend towards earlier harvest and higher temperatures. The vintage of 2008 is an extreme example of what may become more commonplace in future.

Moderate winter rainfall in 2007 refilled the soil profile. Good soil moisture and calm weather conditions combined with warmer than average spring temperatures helped fuel rapid shoot growth. In general vine vigour was greater in 2007 than in spring 2006, which followed a very dry winter.

The wet spring produced good canopy structure. Rainfall in late December and late January topped up soil moisture to retain canopy health. Canopies were generally adequate to ripen their crop load and good canopies and leaf coverage helped white varieties handle the summer weather well. Heat stress was rare in early summer. The start of January was very hot, with a maximum temperature over 40°C, but by mid-January the temperatures were in the 20°C range most days and these mild conditions persisted into the start of March. Cool and dry conditions during berry ripening were conducive to excellent flavour, colour and phenolic development.

Vintage started in the first week of February, slightly earlier than average. All white varieties were picked prior to the start of the heatwave on March 3 and displayed strong varietal character and crisp acidity. Much of the premium Shiraz was also off the vine with high natural acid due to the cool early summer and healthy canopies. The heatwave, which saw a record run of 15 days over 35°C, interrupted perfect vintage conditions in McLaren Vale, causing the most condensed harvest in the region's history.

The prolonged heat placed pressure on wineries to process fruit quickly and forced some producers to look outside the region for crushing services. Approximately five percent of fruit was left on the vine as it was unable to be processed in time.

By the end of March the bulk of the harvest was complete. This is exceptionally early - with vintage normally persisting until the end of April.

While there were challenges with the sudden ripening, overall 2008 will be a great year for quality.

*McLaren Vale Grape, Wine and Tourism Association and
McLaren Vale CropWatch SA*

Overview of vintage statistics

The harvest from McLaren Vale was 54,602 tonnes, compared with 35,293 tonnes in 2007. The estimated total value of the grapes increased from \$46 million in 2007 to \$88 million, and average purchase values for Shiraz and Cabernet Sauvignon increased again – Cabernet Sauvignon by \$200 per tonne and Shiraz by over \$400 per tonne. The average value of Shiraz in 2008 was nearly back to the 1998 record high level.

New plantings in McLaren Vale in spring 2007 (including top-working and replacements) amounted to a total of only 70 hectares (approximately 1% of the total area) – roughly half being Shiraz.

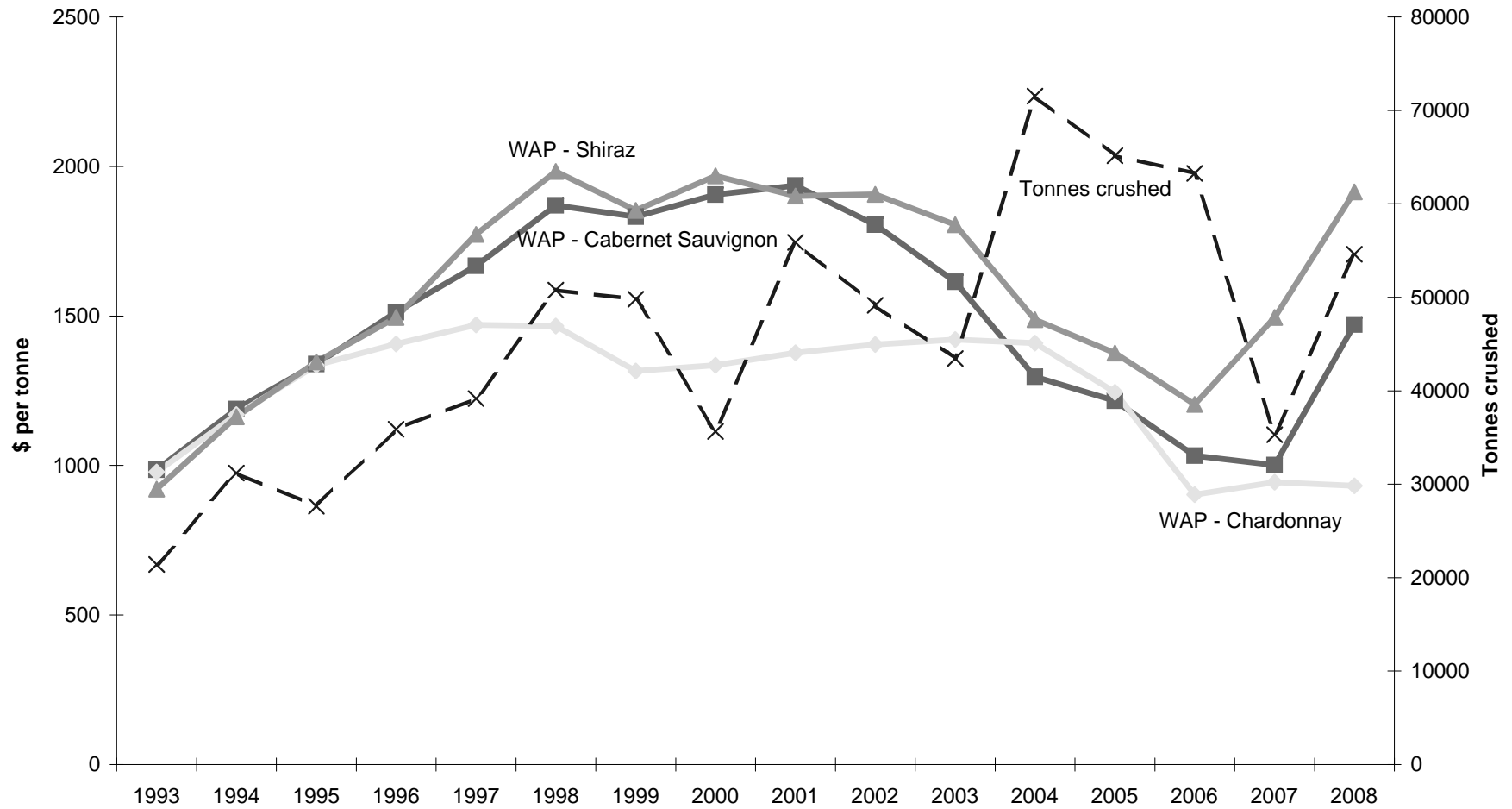
The estimated production from McLaren Vale for 2009 is around 63,000 tonnes (assuming reasonable spring rainfall). 48,000 tonnes is already committed to the wineries, leaving around 16,000 tonnes uncontracted.

In 2013, the estimated production is 58,000 tonnes, of which 67% (39,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 20,000 tonnes – more than one third of production – as yet uncommitted. However, across the state, even if growing conditions return to “normal”, there is expected to be little or no overall surplus compared with demand in 2013 (see State Summary section).

Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
Red winegrapes								
Cabernet Franc	88	\$550	\$1,800	\$93,544	\$1,065	55	143	\$152,342
Cabernet Sauvignon	3,704	\$250	\$6,000	\$5,449,665	\$1,471	3,202	6,906	\$10,161,243
Grenache	1,457	\$500	\$3,000	\$2,125,868	\$1,459	1,452	2,909	\$4,244,864
Malbec	0					40	40	\$70,237
Mataro	63	\$1,200	\$2,500	\$117,022	\$1,872	156	218	\$408,304
Merlot	1,213	\$250	\$2,000	\$1,315,842	\$1,085	1,024	2,237	\$2,426,334
Other Red	17			24,273	\$1,462	256	272	406,509
Petit Verdot	265	\$150	\$1,700	\$229,204	\$863	328	594	\$512,555
Pinot Noir	644	\$800	\$1,550	\$823,070	\$1,278	146	790	\$1,009,726
Sangiovese	62	\$1,200	\$1,600	\$84,768	\$1,361	160	222	\$302,037
Shiraz	18,924	\$100	\$6,000	\$36,235,281	\$1,915	9,861	28,784	\$55,116,507
Tempranillo	42	\$1,200	\$2,000	\$73,386	\$1,736	142	184	\$320,278
Zinfandel	30			\$52,009	\$1,759	4	33	\$58,818
Total red winegrapes	26,508			\$46,623,933		16,825	43,333	\$75,189,755
White winegrapes								
Chardonnay	3,464	\$250	\$1,500	\$3,227,433	\$932	2,620	6,084	\$5,668,336
Chenin Blanc	179	\$900	\$1,200	\$172,505	\$965	100	278	\$268,771
Marsanne	117	\$1,700	\$1,800	\$207,788	\$1,782	33	150	\$266,774
Muscat a Petit Grains Blanc	30			\$44,476	\$1,506	15	44	\$66,488
Other White	11			\$14,869	\$1,297	51	62	\$73,788
Pinot Gris	154	\$999	\$2,200	\$228,131	\$1,479	185	339	\$501,758
Riesling	464	\$700	\$2,000	\$512,385	\$1,105	255	719	\$794,284
Roussanne	48	\$1,700	\$1,700	\$81,396	\$1,700	42	90	\$152,235
Sauvignon Blanc	776	\$1,250	\$2,000	\$1,159,340	\$1,494	565	1,341	\$2,003,612
Semillon	882	\$700	\$1,643	\$855,222	\$970	499	1,381	\$1,339,266
Traminer	21			\$17,352	\$812	0	21	\$17,352
Verdelho	95			\$139,764	\$1,465	141	236	\$345,616
Viognier	333	\$1,300	\$2,000	\$578,300	\$1,734	191	524	\$909,092
Total white winegrapes	6,574			\$7,238,960		4,695	11,268	\$12,407,372
Total all winegrapes²	33,082			\$53,862,893		21,520	54,602	\$87,597,128

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 The estimated non-response rate for McLaren Vale is 17%.



McLaren Vale

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2007
	Pre-2005	2005	2006	2007		
Red winegrapes						
Barbera	10	1	0	1	12	9%
Cabernet Franc	26	0	0	0	26	0%
Cabernet Sauvignon	1310	0	5	0	1315	0%
Grenache	422	0	2	5	429	1%
Mataro (Mourvedre)	24	1	5	3	33	10%
Merlot	314	0	0	0	314	0%
Nebbiolo	11	0	0	0	11	0%
Other red	28	3	0	3	34	10%
Petit Verdot	66	0	1	0	67	0%
Pinot Noir	76	0	0	0	76	0%
Sangiovese	44	4	0	1	49	2%
Shiraz	3505	25	44	37	3612	1%
Tempranillo	25	1	0	1	27	4%
Total red winegrapes	5861	35	57	52	6005	1%
White winegrapes						
Chardonnay	732	5	3	5	745	1%
Chenin Blanc	17	0	0	0	17	0%
Marsanne	13	0	0	0	13	0%
Other white	12	1	1	4	18	21%
Pinot Gris	2	10	4	4	20	22%
Riesling	70	1	0	0	71	0%
Roussanne	11	0	0	0	11	0%
Sauvignon Blanc	121	4	8	4	137	3%
Semillon	123	0	0	0	123	0%
Verdelho	23	0	4	0	26	0%
Viognier	59	12	6	1	78	2%
Total white winegrapes	1182	32	27	18	1260	1%
Rootstock Block	1	0	0	0	1	0%
Unknown variety	122	0	0	0	122	0%
Total all varieties	7167	67	84	70	7388	1%

McLaren Vale

Estimated supply and committed intake 2009 - 2013

Variety	2009				2011				2013			
	Est Supply ¹	Total committed intake ²		Available supply ³	Est Supply ¹	Total committed intake ²		Available supply ³	Est Supply ¹	Total committed intake ²		Available supply ³
		Winery grapes	Contract purchases			Winery grapes	Contract purchases			Winery grapes	Contract purchases	
Red winegrapes												
Barbera	51	30	0	22	54	30	0	24	68	30	0	38
Cabernet Franc	189	86	84	19	134	86	48	0	134	86	48	0
Cabernet Sauvignon	10,476	4,195	2,569	3,712	8,835	4,195	1,550	3,090	8,919	4,241	1,148	3,530
Grenache	3,660	1,558	1,430	671	3,074	1,599	1,263	212	3,104	1,587	1,022	495
Mataro	179	197	64	0	226	224	199	0	259	225	235	0
Merlot	3,481	1,250	885	1,346	2,960	1,146	573	1,240	2,971	1,147	559	1,265
Nebbiolo	51	43	12	0	50	43	12	0	50	43	24	0
Other red	280	210	19	80	246	215	19	43	274	217	19	69
Petit Verdot	572	296	174	102	529	296	48	184	529	296	48	184
Pinot Noir	756	232	308	216	825	232	204	390	825	232	179	415
Sangiovese	316	211	62	43	303	227	62	14	321	239	74	8
Shiraz	30,303	11,185	12,392	6,726	26,985	11,416	8,485	7,084	27,614	11,574	7,109	8,931
Tempranillo	254	116	29	109	161	116	29	16	161	116	29	16
Total red winegrapes	50,568	19,608	18,028	12,932	44,382	19,824	12,493	12,064	45,229	20,034	10,495	14,701
White winegrapes												
Chardonnay	7,629	2,844	2,353	2,433	7,765	2,780	1,264	3,721	7,865	2,780	869	4,217
Chenin Blanc	65	108	144	0	99	132	144	0	158	132	144	0
Marsanne	74	36	132	0	104	36	132	0	104	36	132	0
Other white	80	100	55	2	126	112	55	15	239	118	46	132
Pinot Gris	82	258	66	0	115	258	66	0	135	258	66	0
Riesling	900	245	521	135	730	245	396	89	730	173	378	179
Roussanne	136	48	60	28	107	48	60	0	107	48	60	0
Sauvignon Blanc	1,472	644	482	345	1,371	671	513	187	1,528	677	537	314
Semillon	1,475	491	663	321	1,426	499	632	294	1,458	475	529	454
Verdelho	242	160	78	4	197	160	18	20	245	160	18	67
Viognier	603	263	312	28	474	269	340	0	558	269	301	0
Total white winegrapes	12,758	5,196	4,866	2,697	12,512	5,208	3,621	3,684	13,127	5,124	3,080	4,924
Total all winegrapes	63,326	24,804	22,894	15,629	56,894	25,032	16,114	15,748	58,356	25,157	13,574	19,625

¹ Supply forecast produced by ABARE based on the ABS Vineyard Survey 2007

² A raising factor of 1.20 has been applied to committed intake to allow for non-respondents

³ Where total committed intake is greater than estimated supply, the available supply is recorded as zero.