



McLaren Vale wine region

Regional summary report

2007

McLaren Vale

Vintage overview

Vintage report

A dry winter, followed by a dry spring, saw a reduction in rainfall recorded to less than half the long-term average. This resulted in low soil moisture levels at budburst. Shoot growth was reduced and irrigation began in many vineyards much earlier than over the last few seasons.

The dry season had McLaren Vale's irrigation water supplies pushed to the limit. The district's large-scale water recycling, with 40% of the region accessing reclaimed water from the suburbs of Adelaide, proved highly valuable. However even with this extra water available growing conditions were the toughest in recent memory.

Weather conditions were also unusually cold during spring with night-time temperatures getting close to freezing during September and October. Fortunately only isolated patches of frost damage were seen.

Summer was mild with good weather and no significant disease issues. The only rain that fell came in late January with 40-50mm falling in a thunderstorm. This caused berry splitting which further reduced the harvest. No further rain fell to interfere with ripening, and botrytis and other bunch rots were not an issue.

With the drought conditions and low yields ripening was early and many vineyards were harvested two weeks earlier than 2006. Harvest began in the middle of February. The harvested tonnage in McLaren Vale was greatly affected by the drought conditions. Picking was rapid with most wineries giving staff the Easter Holidays off. All fruit was into the wineries by the middle of April.

James Hook
 McLaren Vale Grape, Wine and Tourism Association

Overview of vintage statistics

The harvest from McLaren Vale was 35,293 tonnes in 2007, compared with over 63,000 tonnes in 2006. The estimated total value of the grapes decreased from \$69 million to \$46 million, a substantial reduction in income, but less than the loss in volume. Average purchase values for most of the major varieties increased, with Shiraz and Cabernet Sauvignon both up by around \$200 per tonne.

New plantings in McLaren Vale in spring 2006 (including top-working and replacements) amounted to 77 hectares (approximately 1% of the total area) – mostly in Shiraz. While this is a very small amount, it is higher than the previous year, and there is no indication of any significant removal of grapevines being undertaken in the region.

The estimated production from McLaren Vale for 2008 is around 66,000 tonnes (assuming reasonable spring rainfall). 48,000 tonnes is already committed to the wineries, leaving around 17,000 tonnes uncontracted. Any uncontracted fruit is likely to be in demand, as shortfalls are predicted across the state, due to water restrictions and the after-effects of drought and frost in other regions (see State Summary section).

By 2012, the estimated production is 70,000 tonnes, of which 57% (40,000 tonnes) is already under contract or winery grown fruit. This proportion is low compared with most other regions, and leaves an estimated 30,000 tonnes – more than one third of production - to be sold 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).

McLaren Vale

Winegrape intake summary – vintage 2007

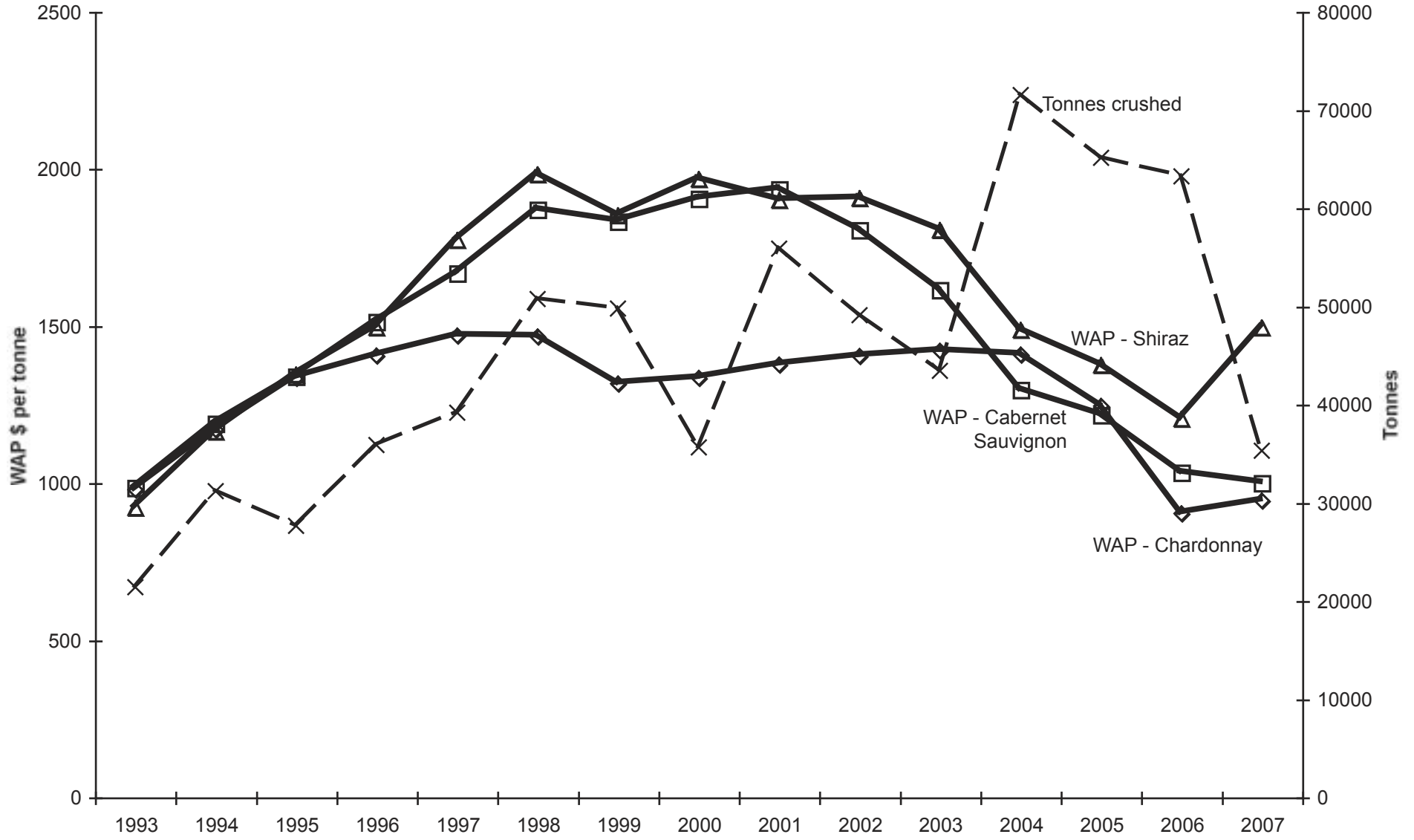
Variety	Tonnes purchased	Lowest price ¹	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	29	\$600	\$2,000	\$29,447	\$1,001	42	71	\$71,178
Cabernet Sauvignon	3,218	\$350	\$5,000	\$4,027,043	\$1,251	1,775	4,993	\$6,247,930
Grenache	1,293	\$600	\$3,000	\$1,650,664	\$1,276	843	2,136	\$2,726,037
Malbec	3			\$3,070	\$1,228	23	26	\$31,412
Mataro	15	\$1,200	\$2,300	\$26,555	\$1,759	133	148	\$260,520
Merlot	1,472	\$600	\$1,680	\$1,583,204	\$1,075	745	2,217	\$2,384,453
Other Red	20	\$600	\$2,000	\$29,574	\$1,510	201	220	\$332,972
Petit Verdot	248	\$550	\$1,500	\$286,624	\$1,154	228	476	\$549,827
Pinot Noir	514	\$500	\$1,804	\$632,742	\$1,230	79	594	\$730,427
Ruby Cabernet	0					6	6	\$8,980
Sangiovese	55	\$950	\$1,800	\$75,866	\$1,375	159	214	\$294,799
Shiraz	10,777	\$100	\$7,104	\$16,115,326	\$1,495	4,499	15,276	\$22,842,370
Tempranillo	22	\$800	\$1,800	\$32,006	\$1,424	74	96	\$136,666
Total red winegrapes	17,668			\$24,492,121		8,806	26,474	\$36,617,572
RED								
Chardonnay	4,434	\$600	\$2,000	\$4,187,714	\$944	1,596	6,030	\$5,695,387
Chenin Blanc	14			\$12,337	\$881	30	44	\$38,421
Colombard	16			\$16,312	\$1020	0	16	\$16,312
Other White	100	\$650	\$5,300	\$175,721	\$1,765	114	213	\$376,258
Pinot Gris	28			\$27,980	\$999	55	83	\$83,415
Riesling	311	\$700	\$1,500	\$304,278	\$978	185	496	\$485,195
Sauvignon Blanc	451	\$600	\$1,900	\$618,831	\$1,371	234	686	\$940,084
Semillon	524	\$450	\$1,778	\$453,003	\$865	330	854	\$738,071
Traminer	20			\$16,290	\$819	0	20	\$16,290
Verdelho	32			\$45,574	\$1,422	49	81	\$115,683
Viognier	178	\$1,800	\$2,000	\$329,091	\$1,846	118	296	\$546,368
Total white winegrapes	6,108			\$6,187,130		2,711	8,819	\$9,051,485
Total all winegrapes	23,776			\$30,679,251		11,517	35,293	\$45,669,057

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



McLaren Vale

Historical WAP vs tonnes crushed



McLaren Vale

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											
Barbera	8	0	1	0	9	0%	74	78	78	82	82
Cabernet Franc	24	0	0	0	24	0%	212	212	212	222	222
Cabernet Sauvignon	1311	5	0	5	1321	0%	10526	10545	10572	11101	11101
Grenache	416	1	0	2	419	0%	3757	3766	3780	3969	3969
Mataro (Mouvedre)	23	1	1	5	30	17%	219	245	278	291	291
Merlot	315	2	0	0	317	0%	2849	2849	2849	2992	2992
Nebbiolo	48	0	0	0	49	0%	437	438	438	460	460
Other red	20	6	2	0	28	0%	243	252	252	265	265
Petit Verdot	66	0	0	1	67	2%	593	600	613	643	643
Pinot Noir	81	0	0	0	81	0%	729	729	729	766	766
Sangiovese	43	3	4	0	49	0%	424	440	440	462	462
Shiraz	3378	31	22	39	3471	1%	30785	31059	31325	32891	32891
Tempranillo	22	2	1	0	25	0%	220	225	225	236	236
Total red winegrapes	5755	50	31	52	5888	1%	51070	51439	51791	54381	54381
White winegrapes											
Chardonnay	680	47	5	3	735	0%	8756	8805	8842	9284	9284
Chenin Blanc	17	0	0	2	20	11%	208	221	247	260	260
Marsanne	14	0	0	0	14	2%	163	165	168	176	176
Other white	11	1	1	1	14	9%	148	162	178	186	186
Pinot Gris	1	1	10	4	16	27%	79	162	200	210	210
Riesling	78	0	1	0	79	0%	942	948	948	996	996
Roussanne	9	1	0	0	10	0%	126	126	126	132	132
Sauvignon Blanc	109	8	3	7	128	6%	1672	1745	1824	1915	1915
Semillon	126	0	0	0	126	0%	1507	1507	1507	1583	1583
Verdelho	21	0	0	0	21	2%	249	252	257	269	269
Viognier	48	10	12	6	76	8%	766	872	927	973	973
Total white winegrapes	1114	69	32	25	1239	2%	14617	14965	15223	15984	15984
Rootstock Block	1	0	0	0	1	0%					
Total all varieties	6870	119	62	77	7128	1%	65687	66404	67014	70365	70365



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Estimated production 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	212	80	28	104	212	102	28	82	222	102	28	93
Cabernet Sauvignon	10,526	4,083	3,784	2,660	10,572	4,280	2,918	3,374	11,101	4,305	1,850	4,946
Grenache	3,757	1,630	1,264	863	3,780	1,701	1,134	946	3,969	1,757	937	1,276
Malbec	0	36	3	-39	0	25	3	-28	0	25	3	-28
Mataro	219	153	30	36	278	153	30	95	291	153	24	114
Merlot	2,849	1,271	987	591	2,849	1,312	802	735	2,992	1,330	614	1,048
Other Red	754	284	22	448	768	290	22	456	806	290	22	494
Petit Verdot	593	238	242	114	613	282	136	195	643	282	88	273
Pinot Noir	729	147	407	176	729	160	379	190	766	166	273	327
Ruby Cabernet	0	17	0	-17	0	0	0	0	0	0	0	0
Sangiovese	424	178	92	155	440	176	97	168	462	176	64	223
Shiraz	30,785	9,152	14,279	7,354	31,325	9,737	11,325	10,263	32,891	9,868	9,290	13,733
Tempranillo	220	151	36	33	225	150	24	51	236	151	24	61
Total red winegrapes	51,070	17,419	21,173	12,478	51,791	18,368	16,898	16,525	54,381	18,604	13,216	22,560
White winegrapes												
Chardonnay	8,756	2,917	2,837	3,002	8,842	3,022	2,154	3,666	9,284	3,063	1,458	4,764
Chenin Blanc	208	63	0	145	247	76	0	171	260	76	0	184
Colombard	0	0	0	0	0	0	0	0	0	0	0	0
Other White	436	183	159	94	471	185	141	145	495	185	141	169
Pinot Gris	79	140	0	-61	200	155	0	45	210	164	0	46
Riesling	942	268	494	180	948	312	474	163	996	312	317	367
Sauvignon Blanc	1,672	475	590	607	1,824	533	560	731	1,915	559	394	962
Semillon	1,507	466	486	555	1,507	489	393	625	1,583	507	272	804
Traminer	0	0	10	-10	0	0	0	0	0	0	0	0
Verdelho	249	169	75	5	257	169	75	12	269	169	53	47
Viognier	766	183	220	363	927	193	221	512	973	194	221	557
Total white winegrapes	14,617	4,866	4,871	4,880	15,223	5,134	4,019	6,070	15,984	5,229	2,856	7,900
Total all winegrapes	65,687	22,285	26,044	17,357	67,014	23,501	20,917	22,595	70,365	23,833	16,072	30,460

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

² A raising factor of 1.105 has been applied to these figures to allow for non-respondents

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