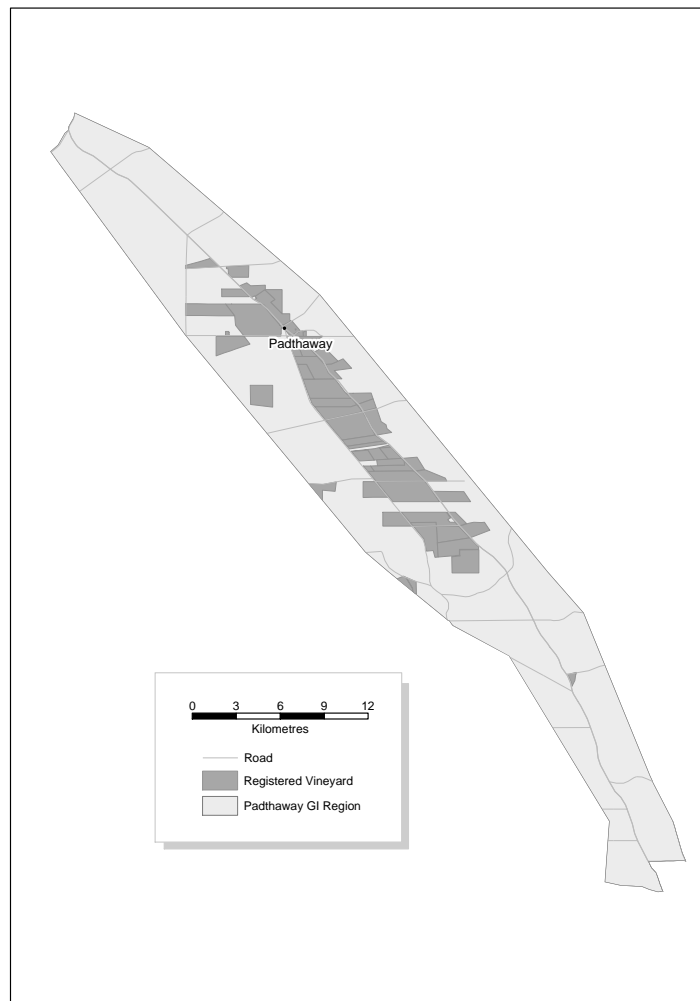


## PADTHAWAY VINTAGE OVERVIEW



### *Vintage Report*

The season began with a wet August – the first for a few years. Cool and windy conditions prevailed through September and October.

Budburst was very good and even through most varieties. Light early frosts gave some leaf damage in isolated pockets to fruit and leaf. While the damage looked bad the vines recovered extremely well with most going on to produce a reasonable crop.

Flowering happened over a short period in ideal conditions and the set in most varieties was excellent. This together with good shoot numbers led to very heavy crop loads.

Many growers had to thin crops to maintain quality and it was interesting to see a lot of mechanical thinning done with harvesters, quite effectively in most cases.

January was very cool and average temperatures were well below normal while February and March were warm. Mild weather continued through April and May.

Disease pressures were low with no real problems from mildew all season. There was some botrytis about in late summer and autumn; however, the weather was kind through the autumn and damage was slight.

Harvest was conducted in great weather conditions with little rain about. The heavy crop loads caused harvest to be later than normal, particularly in the red varieties.

Quality this season was excellent in the white varieties. The reds were very good, mainly due to the favourable weather during autumn allowing late ripening.

*Ian Ward*

*President, Padthaway Grapegrowers Ass.*

### *Overview of vintage statistics*

Padthaway produced 51,130 tonnes this year – a massive increase of 85% compared with 2003. There were surpluses of most red varieties, and smaller surpluses of white varieties. An interesting finding was a significant increase in the share of purchased fruit in the white varieties – up from 19% to 27%. This probably reflects more crop-thinning in winery-owned vineyards to reduce yield.

The calculated average purchase value for Cabernet Sauvignon and Shiraz dropped by \$500 per tonne or more. The average value per tonne of Chardonnay dropped by around \$150. However, the total income for growers in the region increased by over 50%, and the estimated value of all grapes from the region increased from \$38 million to \$55 million.

The forecast is for a stabilisation in intake at around 38,000 tonnes (much less than the 2004 vintage), with whites increasing by 1,000 tonnes over the five years and reds decreasing by a similar amount. There is a consistent surplus of Cabernet Sauvignon.

Chardonnay remains the major variety for the region. It is set to increase its share of total intake over the forecast period from 27% to 36%, while its nearest rival – Shiraz - declines. Consistent with the lack of growth forecast for the region, there was very little new planting in the region in 2003, and the total area of registered vines actually declined slightly compared with the previous year.

## PADTHAWAY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 12.1

Variety	Current area in hectares by year planted						Total area	% planted in 2003
	Pre-1999	1999	2000	2001	2002	2003		
<b>RED WINEGRAPES</b>								
CABERNET FRANC	24	0	0	0	0	0	24	0%
CABERNET SAUVIGNON	623	109	72	9	6	0	819	0%
MALBEC	37	0	0	0	0	0	37	0%
MERLOT	163	6	0	0	0	0	169	0%
NEBBIOLO	0	0	1	0	0	0	1	0%
PETIT VERDOT	5	0	0	0	0	0	5	0%
PINOT NOIR	95	0	3	0	0	0	98	0%
SANGIOVESE	0	1	4	0	0	0	5	0%
SHIRAZ	689	73	75	79	65	11	993	1%
OTHER RED	1	0	0	0	0	0	1	0%
<b>TOTAL RED WINEGRAPES</b>	<b>1637</b>	<b>189</b>	<b>155</b>	<b>88</b>	<b>71</b>	<b>11</b>	<b>2152</b>	<b>1%</b>
<b>WHITE WINEGRAPES</b>								
CHARDONNAY	721	0	18	61	79	24	902	3%
MUSCAT BLANC	12	0	0	0	0	0	12	0%
RIESLING	284	0	0	17	0	0	301	0%
SAUVIGNON BLANC	49	2	0	0	0	7	58	12%
SEMILLON	79	0	0	0	0	0	79	0%
TRAMINER	30	0	0	0	0	9	39	23%
VERDELHO	32	2	0	0	0	0	34	0%
VIIGNIER	4	0	4	5	0	0	13	0%
OTHER WHITE	0	0	0	0	0	0	0	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>1211</b>	<b>4</b>	<b>22</b>	<b>83</b>	<b>79</b>	<b>40</b>	<b>1438</b>	<b>3%</b>
<b>TOTAL ALL VARIETIES</b>	<b>2849</b>	<b>193</b>	<b>177</b>	<b>170</b>	<b>151</b>	<b>51</b>	<b>3590</b>	<b>1%</b>



## PADTHAWAY TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 12.2

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
<b>RED</b>									
Cabernet Franc	411	0	411	283	0%	145%	3	0	2
Cabernet Sauvignon	5433	5953	11386	9249	52%	123%	5	12	13
Malbec	187	128	315	235	41%	134%	3	2	3
Merlot	1782	458	2240	1816	20%	123%	6	7	8
Meunier	8	0	8	8	0%	100%	1	0	1
Petit Verdot	61	0	61	24	0%	259%	2	0	1
Pinot Noir	1803	235	2038	1183	12%	172%	4	2	3
Ruby Cabernet	25	0	25	25	0%	100%	1	0	1
Sangiovese	0	24	24	24	100%	101%	0	1	1
Shiraz	6784	7026	13810	11218	51%	123%	7	15	18
<b>Total RED</b>	<b>16495</b>	<b>13824</b>	<b>30319</b>	<b>24066</b>	<b>46%</b>	<b>126%</b>			
<b>WHITE</b>									
Arneis	3	0	3	3	0%	100%	1	0	1
Chardonnay	9647	4801	14448	13215	33%	109%	6	16	18
Muscat Blanc (Frontignac)	108	0	108	108	0%	100%	1	0	1
Riesling	2809	157	2966	2896	5%	102%	3	1	2
Sauvignon Blanc	779	216	994	670	22%	148%	4	4	6
Semillon	1131	232	1363	1363	17%	100%	2	2	4
Traminer	381	0	381	381	0%	100%	2	0	2
Verdelho	395	67	462	417	15%	111%	2	2	3
Viognier	41	46	87	200	53%	43%	1	1	1
<b>Total WHITE</b>	<b>15293</b>	<b>5518</b>	<b>20812</b>	<b>19253</b>	<b>27%</b>	<b>108%</b>			
<b>Total for region</b>	<b>31788</b>	<b>19342</b>	<b>51130</b>	<b>43318</b>					

## PADTHAWAY CROP VALUE DATA - VINTAGE 2004

Table 12.3

estimated total value

Variety	Grower grown	Total crushed (1)	estimated total value		lowest	highest	calc average purchase	
			purchased grapes	total grapes	price (2)	price (2)	value per tonne (3)	
<b>RED</b>								
Cabernet Sauvignon	5953	11386	\$5,326,859	\$10,188,789	\$200	\$1,767	<b>\$895</b>	100%
Malbec	128	315	\$78,743	\$194,252			<b>\$617</b>	100%
Merlot	458	2240	\$495,819	\$2,425,615	\$350	\$1,766	<b>\$1,083</b>	100%
Pinot Noir	235	2038	\$211,058	\$1,829,711			<b>\$898</b>	100%
Sangiovese	24	24	\$42,727	\$42,727			<b>\$1,766</b>	100%
Shiraz	7026	13810	\$7,454,732	\$14,652,429	\$340	\$1,800	<b>\$1,061</b>	99%
<b>Total RED</b>	<b>13824</b>	<b>29813</b>	<b>\$13,609,938</b>	<b>\$29,333,523</b>				
<b>WHITE</b>								
Chardonnay	4801	14448	\$6,372,865	\$19,177,940	\$500	\$1,766	<b>\$1,327</b>	100%
Riesling	157	2966	\$172,766	\$3,262,567			<b>\$1,100</b>	100%
Sauvignon Blanc	216	994	\$251,206	\$1,158,776	\$855	\$1,400	<b>\$1,166</b>	100%
Semillon	232	1363	\$230,131	\$1,351,695			<b>\$992</b>	100%
Verdelho	67	462	\$40,340	\$276,785			<b>\$599</b>	100%
Viognier	46	87	\$80,508	\$153,138			<b>\$1,766</b>	100%
<b>Total WHITE</b>	<b>5518</b>	<b>20319</b>	<b>\$7,147,816</b>	<b>\$25,380,901</b>				

(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.



## PADTHAWAY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 12.4

Variety	2005		2006		2007		2008		2009	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
<b>RED</b>										
Cabernet Franc	202	124	202	124	202	124	202	124	202	124
Cabernet Sauvignon	8178	6997	7949	6796	7906	6791	6887	5934	6801	6010
Malbec	247	185	202	140	202	140	180	140	180	140
Merlot	1725	1407	1745	1427	2273	2141	3003	2754	3007	2866
Meunier	4	4	4	4	4	4	0	0	0	0
Petit Verdot	40	13	27	0	27	0	27	0	27	0
Pinot Noir	1617	819	1650	852	1571	773	1345	547	1345	547
Ruby Cabernet	20	20	20	20	20	20	0	0	0	0
Sangiovese	49	49	49	49	49	49	50	50	50	50
Shiraz	10775	9887	10131	9453	10339	9728	9229	9012	9121	9117
<b>Total for RED</b>	<b>22858</b>	<b>19505</b>	<b>21980</b>	<b>18865</b>	<b>22594</b>	<b>19770</b>	<b>20923</b>	<b>18561</b>	<b>20733</b>	<b>18854</b>
<b>WHITE</b>										
Arneis	1	1	1	1	1	1	1	1	1	1
Chardonnay	10609	9995	10878	10383	11427	11263	12768	12709	12849	12840
Muscat Blanc	124	124	0	0	0	0	0	0	0	0
Riesling	2883	2818	2883	2818	2883	2818	2622	2557	2622	2557
Sauvignon Blanc	725	625	764	693	780	710	851	780	851	780
Semillon	525	525	457	457	457	457	56	56	56	56
Traminer	633	115	414	414	474	474	557	395	557	395
Verdelho	330	330	269	269	269	269	267	267	267	267
Viognier	110	250	141	280	141	300	0	300	0	300
<b>Total for WHITE</b>	<b>15940</b>	<b>14783</b>	<b>15808</b>	<b>15315</b>	<b>16433</b>	<b>16292</b>	<b>17122</b>	<b>17065</b>	<b>17203</b>	<b>17196</b>
<b>Total for region</b>	<b>38798</b>	<b>34288</b>	<b>37788</b>	<b>34180</b>	<b>39027</b>	<b>36062</b>	<b>38045</b>	<b>35626</b>	<b>37936</b>	<b>36050</b>

**PADTHAWAY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 2000 - 2009**

Figure 12.1

**Past production and projections (major varieties)**

