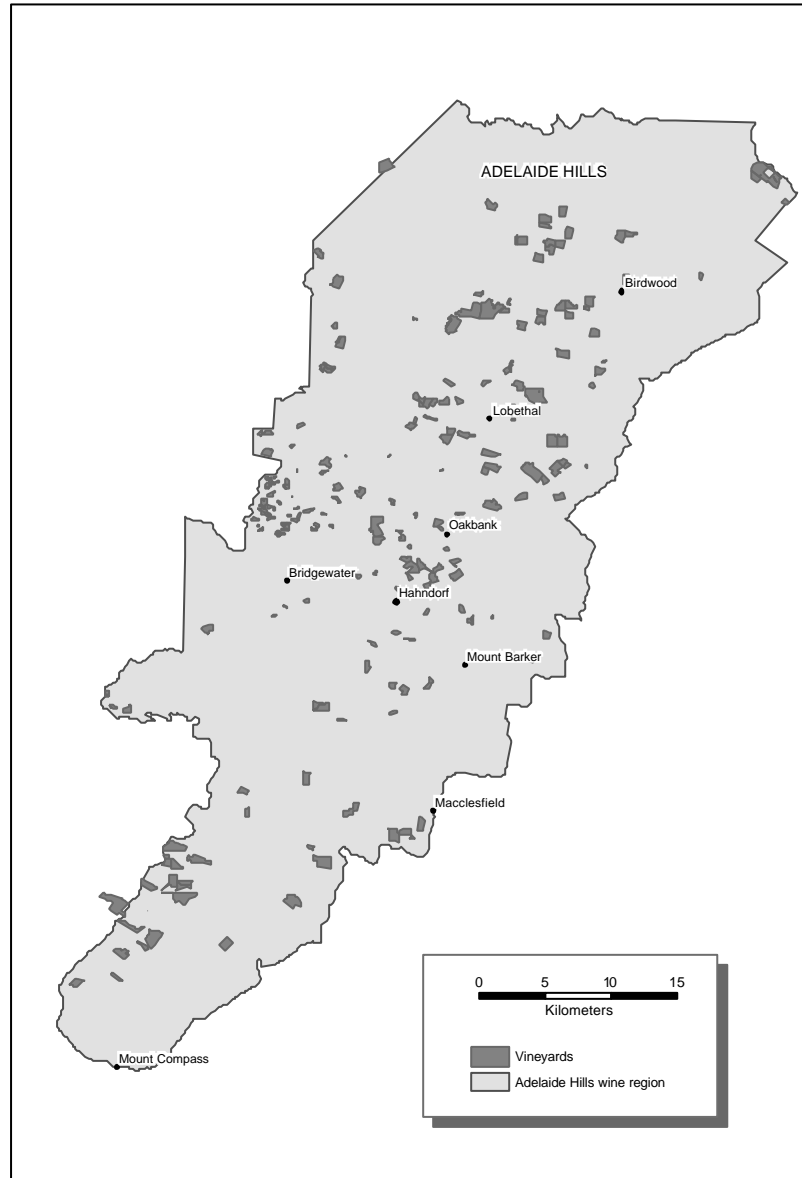


Adelaide Hills

ADELAIDE HILLS VINTAGE OVERVIEW



Vintage report

For most growers this was a disastrous season tonnage-wise. For winemakers perhaps not so bad – with not a great deal of fruit to handle, but fruit flavours, acid and intensity very good for both red and white varieties.

Winter began in mid-August, with heavy rains and cold temperatures leading right through to Christmas. Budburst was slow and staggered as was flowering and set. Inflorescence numbers appeared to be up on last season, however, the cold wet flowering period put paid to any hope of crops equal to or greater than the previous season.

Post-set revealed straggly loose bunches with many shot berries, the only bright light being that the openness of the bunches allowed good spray penetration to combat downy and botrytis which were lurking with the continual presence of the cloudy rainy weather.

The new year brought fine weather, but not hot, and vintage was expected to be up to four weeks late (and it was). The warm dry conditions in combination with the low yields still allowed the vines to ripen their fruit, maintain good acids and pH, and intensify fruit flavours.

Alan Dean

Overview of vintage statistics

The Adelaide Hills produced 11,057 tonnes in 2002, a drastic 42% drop after the high yielding 2001 vintage of 18,920 tonnes. Not surprisingly, there was a shortfall of around 20% or 3000 tonnes – one third of which was in Chardonnay.

The weighted average weighbridge price (WAWP) for Chardonnay was up by \$90 and for Shiraz by over \$200; on the other hand, the WAWP for Cabernet Sauvignon was down by around \$80 compared with last year.

The five year forecast for the region is for a slight increase to around 20,000 tonnes – with supply exceeding demand substantially in red varieties for all five years, and white varieties being in balance by 2007. This is the only South Australian region where the balance is expected to tip back in favour of white varieties, which are expected to contribute more than 50% of production within the forecast period. The three dominant varieties for the region are Chardonnay, Pinot Noir and Sauvignon Blanc – with Cabernet Sauvignon and Shiraz each accounting for less than half the production of the other three.

There were 201 hectares of white varieties planted in 2001 in the Adelaide Hills – a 16% increase. This is significantly more white variety plantings than in any other region except the Riverland, and would appear to be more than is required to meet demand in 2007 (see table 1.10).

ADELAIDE HILLS TONNES CRUSHED BY VARIETY - VINTAGE 2002

Table 2.1

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	Purchased	Preferred
RED									
Barbera	2	1	3	14	31%	19%	1	1	1
Cabernet Franc	13	62	74	62	83%	121%	3	6	7
Cabernet Sauvignon	95	1376	1471	1777	94%	83%	8	20	25
Gamay	0	8	8	0	100%		0	1	0
Malbec	3	0	3	8	0%	35%	2	0	2
Merlot	66	701	767	1417	91%	54%	7	17	20
Meunier	5	194	199	177	97%	113%	1	4	4
Nebbiolo	0	1	1	1	100%	106%	0	1	1
Petit Verdot	0	8	8	8	100%	100%	0	1	1
Pinot Noir	151	1651	1802	2165	92%	83%	9	13	19
Sangiovese	0	44	44	42	100%	104%	0	3	3
Shiraz	86	739	825	924	90%	89%	4	20	21
Tannat	0	1	1	0	100%		0	1	0
Tempranillo	4	10	14	19	75%	74%	1	2	2
Zinfandel	11	0	11	15	0%	70%	1	0	1
Total RED	434	4797	5230	6629	92%	79%			
WHITE									
Chardonnay	507	2155	2663	3640	81%	73%	9	18	25
Other white	0	7	7	20	100%	37%	0	4	3
Pinot Gris	3	109	112	149	97%	75%	2	10	10
Riesling	39	49	88	141	55%	62%	5	6	9
Sauvignon Blanc	491	1552	2043	2328	76%	88%	8	17	22
Semillon	29	776	806	997	96%	81%	3	11	13
Verdelho	0	54	54	184	100%	29%	0	3	2
Viognier	0	54	54	104	100%	52%	0	8	7
Total WHITE	1070	4757	5827	7562	82%	77%			
Grand Total (red and white)	1504	9553	11057	14191					

ADELAIDE HILLS PRICE AND BAUME DATA - VINTAGE 2002

Table 2.2

Variety (1)	Grower grown	Total crushed	weighted average baumé (2)		estimated total value		lowest price (3)	highest price (3)	weighted average weighbridge price (4)	
					purchased grapes	total grapes				
RED										
Barbera	1	3	14.5	100%	\$1,440	\$4,680			\$1,800	100%
Cabernet Franc	62	74	13.8	100%	\$97,715	\$117,565	\$1,500	\$1,800	\$1,584	100%
Cabernet Sauvignon	1,376	1,471	13.4	94%	\$2,286,777	\$2,444,622	\$350	\$2,400	\$1,662	100%
Gamay	8	8	10.8	100%	\$15,803	\$15,803			\$1,904	100%
Merlot	701	767	13.7	96%	\$1,141,724	\$1,248,364	\$750	\$2,250	\$1,628	100%
Meunier	194	199	12.0	100%	\$372,748	\$382,767	\$1,600	\$2,182	\$1,919	100%
Nebbiolo	1	1	14.2	100%	\$2,018	\$2,018			\$1,904	100%
Petit Verdot	8	8	12.4	100%	\$15,731	\$15,731			\$1,964	100%
Pinot Noir	1,651	1,802	12.1	100%	\$2,969,346	\$3,241,048	\$863	\$2,500	\$1,798	100%
Sangiovese	44	44	13.7	100%	\$59,873	\$59,873	\$600	\$1,964	\$1,366	100%
Shiraz	739	825	13.8	88%	\$1,334,227	\$1,488,573	\$1,100	\$3,000	\$1,805	100%
Tempranillo	10	14	13.7	100%	\$17,594	\$23,616			\$1,682	100%
Total RED	4,796	5,216			\$8,314,996	\$9,044,660				
WHITE										
Chardonnay	2,155	2,663	12.6	99%	\$3,986,599	\$4,925,233	\$960	\$3,000	\$1,850	100%
Other White	7	7	10.0	52%	\$12,772	\$12,772			\$1,740	74%
Pinot Gris	109	112	13.7	100%	\$178,058	\$183,038	\$1,109	\$2,000	\$1,628	100%
Riesling	49	88	12.4	100%	\$61,662	\$111,595	\$890	\$1,700	\$1,271	100%
Sauvignon Blanc	1,552	2,043	12.3	98%	\$2,688,045	\$3,538,719	\$1,051	\$2,400	\$1,732	100%
Semillon	776	806	12.2	95%	\$1,068,042	\$1,108,451	\$350	\$1,999	\$1,376	100%
Verdelho	54	54	13.1	94%	\$80,271	\$80,271			\$1,495	94%
Viognier	54	54	12.8	99%	\$91,748	\$91,748	\$1,300	\$2,500	\$1,705	100%
Total WHITE	4,757	5,827			\$8,167,197	\$10,051,827				

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

(2) Chardonnay and Pinot Noir are used for sparkling base as well as table wine, which may tend to reduce their average baumé reading

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

(4) This price does not include end use or other bonuses paid after the weighbridge.

ADELAIDE HILLS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2003 TO 2007

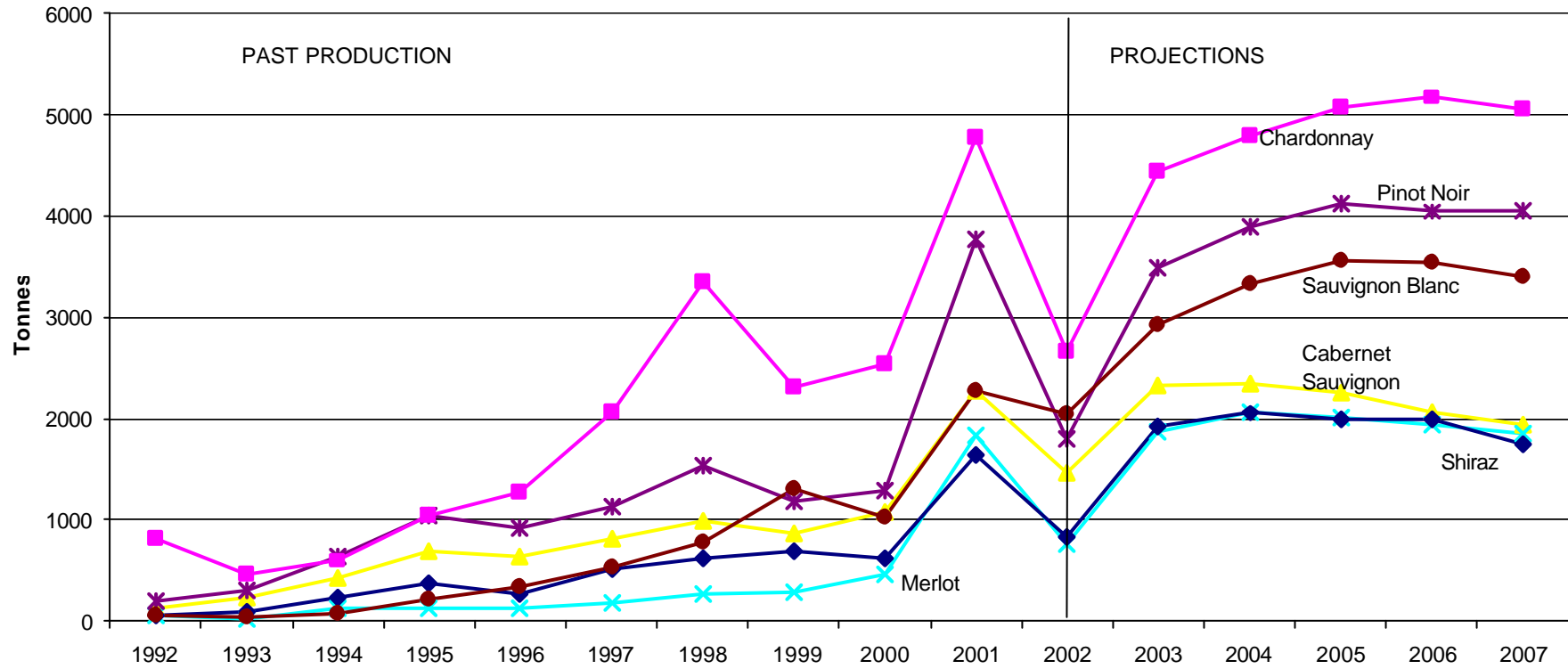
Table 2.3

Variety	2003		2004		2005		2006		2007	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	14	14	14	14	14	14	14	14	14	14
Cabernet Franc	89	56	106	73	114	81	114	81	114	81
Cabernet Sauvignon	2330	1985	2338	2052	2259	1937	2065	1872	1934	1855
Malbec	28	28	36	36	41	41	41	41	41	41
Merlot	1865	1032	2058	1130	2014	1175	1941	1216	1851	1274
Meunier	284	284	285	285	285	285	274	274	246	246
Nebbiolo	15	0	15	0	15	0	15	0	15	0
Petit Verdot	12	12	24	24	24	24	24	24	24	24
Pinot Noir	3483	3272	3881	3508	4127	3727	4037	3872	4054	3919
Sangiovese	45	20	53	25	64	36	36	36	36	36
Shiraz	1913	1144	2050	1403	1990	1370	1985	1470	1746	1289
Tempranillo	65	40	86	54	99	67	99	67	104	67
Zinfandel	28	28	28	28	28	28	28	28	28	28
Total for RED	10171	7915	10974	8632	11074	8785	10673	8995	10206	8874
WHITE										
Chardonnay	4444	4389	4788	4833	5073	5184	5163	5419	5051	5534
Marsanne	1	0	0	0	0	0	0	0	0	0
Other white	19	20	25	20	25	20	25	20	25	20
Pinot Gris	223	228	268	271	284	292	284	297	284	302
Riesling	284	280	472	341	651	379	667	404	682	419
Roussanne	1	0	0	0	0	0	0	0	0	0
Sauvignon Blanc	2922	2730	3323	2987	3559	3229	3537	3357	3403	3443
Semillon	953	667	889	703	840	738	827	776	789	744
Trebbiano	0	0	72	0	135	0	135	0	135	0
Verdelho	240	19	247	19	247	19	229	19	229	19
Viognier	235	198	313	266	337	296	358	323	342	317
Total for WHITE	9321	8530	10397	9439	11151	10156	11225	10614	10939	10797

ADELAIDE HILLS PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1992 - 2007

Figure 2.1

Past production and projections (major varieties)



ADELAIDE HILLS CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 2.4

Variety	Year planted - area in hectares					Total	% planted in 2001
	Pre-98	1998	1999	2000	2001		
RED WINEGRAPES							
CABERNET FRANC	8	1	0	2	-	12	0%
CABERNET SAUVIGNON	184	120	32	18	11	364	3%
GRENACHE	1	1	1	-	-	3	0%
MALBEC	0	1	-	3	-	4	0%
MERLOT	113	86	43	39	13	294	4%
MEUNIER	22	-	-	2	-	24	0%
NEBBIOLO	1	1	-	2	1	5	19%
PETIT VERDOT	1	-	2	-	-	3	0%
PINOT NOIR	196	77	59	26	20	378	5%
SANGIOVESE	1	4	3	4	-	12	0%
SHIRAZ	136	82	35	33	16	302	5%
TEMPRANILLO	0	2	2	2	3	8	40%
ZINFANDEL	1	2	-	-	-	3	0%
OTHER RED	2	1	0	0	0	3	9%
TOTAL RED WINEGRAPES	667	377	177	131	65	1417	5%
WHITE WINEGRAPES							
CHARDONNAY	336	59	26	52	104	577	18%
PINOT GRIS	6	3	11	13	0	33	1%
RIESLING	23	0	2	15	11	52	22%
SAUVIGNON BLANC	166	95	27	70	74	432	17%
SEMILLON	61	24	7	8	-	100	0%
TRAMINER	0	-	-	-	5	5	100%
VERDELHO	18	2	3	-	-	23	0%
VIOGNIER	4	14	8	15	7	47	15%
OTHER WHITE	2	2	0	0	0	4	0%
TOTAL WHITE WINEGRAPES	618	199	84	172	201	1273	16%
ROOTSTOCK BLOCK	1	-	-	-	-	1	0%
TOTAL ALL VARIETIES	1286	576	261	303	265	2691	10%