

Barossa Valley regional vintage summary

BAROSSA VALLEY VINTAGE OVERVIEW

Vintage report

The Barossa Valley had its first wet winter for a number of seasons. This allowed for strong cover crop growth and excellent levels of organic matter being introduced into the soil. Cool wet conditions prevailed at budburst causing some isolated cases of spring fever in Shiraz, which induced potassium deficiency. Cabernet Sauvignon was also affected with uneven budburst and slow early season growth.

Spring conditions were almost ideal for growing grapes in this traditional region. Rainfall was moderate to high, allowing for strong vegetative growth and inflorescence development. The warm dry conditions that occurred during flowering aided in fruit set. Set was good in most varieties with Cabernet Sauvignon being the standout variety. Cropping levels were slightly up with most varieties around the 8-10 tonnes per hectare, whilst Cabernet Sauvignon averaged around 10-12 tonnes per hectare.

Summer was a completely different story, with very hot dry conditions prevailing. Irrigation levels were dramatically increased as the vines started to show signs of severe stress. During the peak of the hot spells, vines were losing water quicker than they could take it up, this leading to heavy leaf discolouration and defoliation. The white varieties were nearly ripe when the hot spell occurred, leading to high levels of sunburn and berry shrivel in these varieties. The earlier red varieties were also heat affected with Shiraz starting to shrivel at a lower baumé than normal. Cabernet Sauvignon was the best of the varieties, with most blocks holding their weight until harvest whilst reaching very high baumé levels.

The conditions that occurred in the Barossa Valley this season were not conducive to disease development and there was a very low incidence of downy and powdery mildew.

Overall it was a difficult season for white wine production, with the majority of white varieties being heat affected to some degree. Semillon was the notable performer in the Barossa this season. Most blocks were picked at a slightly lower baumé, giving medium-bodied wines with soft yet crisp fruit flavours. There were mixed results with Chardonnay, with some very good parcels of fruit but a general classification of average to good quality. The very hot dry weather made it tough for the more delicate aromatic varieties of Riesling and Sauvignon Blanc.

A combination of above average temperatures and a long, dry maturation period allowed for red varieties to reach full maturity. The long and uninterrupted ripening aided in the

development of strong varietal flavours and moderate tannins that have been recognised this season. Shiraz was the standout variety with the majority of the wines exhibiting strong berry flavours in combination with an elegant yet well-balanced palate. Cabernet Sauvignon was not far behind the Shiraz, with some exceptional parcels of fruit.

Overview of vintage statistics

Tonnages were up by over 40% in the Barossa Valley this year. This was partly due to new plantings coming on stream, but also because of the very low tonnages from Shiraz last year. Overall, the vintage was around the same level as 1998 and 1999, and not much higher than 1996. Despite the increased tonnages, there were still shortfalls in most of the major varieties – particularly Chardonnay, Semillon and Shiraz.

Prices were slightly higher overall, although Shiraz was a notable exception (down by \$100 compared with the shortage-affected 2000 vintage). Riesling was up by 20%, reflecting the variety's resurgence in popularity and shortfall in supply.

Substantial growth is forecast for red varieties in the region, with supply expected to grow by 20,000 tonnes (60%) in the next five years. Whites are forecast to grow by 20% over the same period, and will still be in short supply overall by 2006. The main varieties showing a shortfall over the forecast period are Merlot, Riesling and Semillon. However, the major variety for the region by far is Shiraz, with three times the tonnage of the next largest variety. Cabernet Sauvignon is set to overtake Semillon in 2004 as the second major variety for the region. This is the only region that is forecast to produce more Semillon than Chardonnay over the next five years.

In the Barossa zone (including Eden Valley as well as the Barossa Valley) there has been a substantial drop in new plantings of red varieties in 2000 – from 622 hectares in 1999 to 352 hectares. The current rate of growth in new plantings may not be enough to meet the demand for grapes in 2006 (see table on page 19 of the State Summary section). However, higher water quality and availability via the Barossa Infrastructure Scheme is expected to have a significant impact, by increasing yields for existing plantings and influencing large scale developments in previously undeveloped areas such as the Western Barossa region.

BAROSSA ZONE (BAROSSA VALLEY AND EDEN VALLEY) PLANTINGS BY VARIETY

Table 3.1

Year planted - area in hectares

Variety	Pre-97	1997	1998	1999	2000	Total	% planted in 2000
RED WINEGRAPES							
CABERNET FRANC	62	1	-	-	3	66	4%
CABERNET SAUVIGNON	817	161	211	136	81	1406	6%
GRENACHE	609	6	6	25	16	662	2%
MALBEC	20	1	-	-	-	21	0%
MATARO	95	2	4	13	4	117	4%
MERLOT	117	52	39	33	33	274	12%
PETIT VERDOT	1	7	5	3	4	21	20%
PINOT NOIR	151	9	5	6	2	172	1%
SANGIOVESE	2	7	1	2	8	21	39%
SHIRAZ	1999	413	542	392	187	3533	5%
OTHER RED	39	1	3	12	16	70	22%
TOTAL RED WINEGRAPES	3912	660	816	622	352	6363	6%
WHITE WINEGRAPES							
CHARDONNAY	709	10	2	6	8	736	1%
CHENIN BLANC	90	-	-	-	-	90	0%
MUSCADELLE	80	-	-	-	-	80	0%
MUSCAT BLANC	67	0	-	-	-	67	0%
PALOMINO	24	-	-	-	-	24	0%
PEDRO XIMENEZ	42	-	-	-	-	42	0%
PINOT GRIS	1	0	4	3	-	8	0%
RIESLING	748	3	10	21	27	810	3%
SAUVIGNON BLANC	134	2	1	3	2	141	1%
SEMILLON	767	33	5	6	1	812	0%
TRAMINER	41	0	-	-	-	42	0%
VERDELHO	1	2	-	1	1	5	27%
VIIGNIER	7	4	2	3	11	26	40%
OTHER WHITE + MULTIPURPOSE	50	1	-	1	-	52	0%
TOTAL WHITE WINEGRAPES	2762	56	24	44	50	2935	2%
OTHER VARIETIES							
ROOTSTOCK BLOCK	-	-	-	15	-	15	0%
TOTAL ALL VARIETIES	6674	716	840	680	402	9313	4%

Includes the hundreds of Barossa, Belvidere, Dutton, Jellicoe, Jutland, Moorooroo, Nuriootpa and Pt Gawler

BAROSSA VALLEY TONNES CRUSHED BY VARIETY (RED) - VINTAGE 2001

Table 3.2

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
RED									
Black Muscat	0	11	11	11	100%	99%	0	1	1
Cabernet Franc	182	300	481	447	62%	108%	6	12	13
Cabernet Sauvignon	1632	4943	6575	7384	75%	89%	21	28	33
Gamay	0	2	2	0	100%		0	1	0
Grenache	472	2825	3297	3063	86%	108%	11	22	23
Malbec	80	121	201	145	60%	139%	6	6	9
Mataro (Mouvedre)	140	443	583	663	76%	88%	5	12	14
Merlot	333	905	1238	1627	73%	76%	12	13	20
Meunier	0	9	9	9	100%	103%	0	1	1
Muscat Brown (Red Front)	0	5	5	5	100%	97%	0	1	1
Nebbiolo	1	0	1	3	0%	33%	1	0	1
Other red	17	23	41	25	58%	161%	2	1	3
Petit Verdot	27	15	43	39	36%	110%	4	4	5
Pinot Noir	218	759	977	430	78%	227%	7	11	9
Ruby Cabernet	0	13	13	0	100%		0	1	0
Sangiovese	5	98	103	111	95%	93%	1	2	2
Shiraz	3790	16782	20571	21880	82%	94%	23	30	36
Tempranillo	5	1	6	20	9%	29%	1	1	2
Tinta Amarella	0	24	24	0	100%		0	1	0
Tinta Cao	0	16	16	20	100%	81%	0	1	1
Tinta Molle	0	15	15	0	100%		0	1	0
Touriga	13	68	81	13	84%	620%	1	1	1
Zinfandel	1	8	9	21	89%	45%	1	1	3
Total RED	6916	27387	34303	35916	80%	96%			

BAROSSA VALLEY TONNES CRUSHED BY VARIETY (WHITE) - VINTAGE 2001

Table 3.3

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
WHITE									
Chardonnay	1042	4618	5659	7182	82%	79%	11	16	17
Chenin Blanc	10	1091	1101	644	99%	171%	2	10	11
Colombard	0	9	9	10	100%	92%	0	1	1
Crouchen	0	26	26	0	100%		0	3	0
Doradillo	4	3	7	0	47%		1	2	0
Marsanne	1	0	1	10	0%	11%	1	0	1
Muscadelle (Tokay)	43	341	383	93	89%	411%	1	11	8
Muscat Blanc (Frontignac)	89	316	406	187	78%	217%	4	10	11
Muscat Gordo Blanco	0	16	16	16	100%	97%	0	2	2
Other white	4	100	104	91	96%	114%	1	3	2
Palomino	61	54	115	76	47%	152%	2	3	3
Pedro Ximenes	69	123	192	161	64%	119%	2	8	7
Riesling	618	2096	2714	3643	77%	75%	11	19	19
Sauvignon Blanc	212	654	866	868	76%	100%	6	13	9
Semillon	769	6998	7768	9163	90%	85%	13	20	24
Sylvaner	0	35	35	10	100%	350%	0	2	1
Traminer	11	82	93	61	88%	151%	1	5	5
Trebbiano	0	20	20	1	100%	2261%	0	4	1
Verdelho	0	19	19	0	100%		0	1	0
Viognier	0	0	0	86		0%	0	0	2
Total WHITE	2934	16602	19536	22303	85%	88%			
Grand Total (red and white)	9850	43989	53839	58219					

BAROSSA VALLEY PRICE AND BAUME DATA (RED) - VINTAGE 2001

Table 3.4

Variety	weighted average		weighted average baumé	lowest price**	highest price**	estimated total value	
	weighbridge price*					purchased grapes	total grapes
Black Muscat	\$788	100%	18.5 100%			\$8,550	\$8,550
Cabernet Franc	\$1,136	97%	13.8 79%	\$830	\$1,900	\$340,403	\$546,585
Cabernet Sauvignon	\$1,780	100%	13.7 73%	\$1,050	\$4,275	\$8,798,601	\$11,699,034
Gamay	\$978	100%	12.2 100%			\$2,406	\$2,406
Grenache	\$1,131	97%	14.1 68%	\$500	\$2,364	\$3,193,885	\$3,714,841
Malbec	\$1,386	100%	13.4 85%	\$1,025	\$2,000	\$168,180	\$278,903
Mataro (Mouvedre)	\$1,125	98%	13.3 64%	\$765	\$2,300	\$497,879	\$652,616
Merlot	\$1,655	100%	13.5 71%	\$1,030	\$3,550	\$1,497,933	\$2,041,550
Meunier	\$1,197	100%	11.4 100%			\$11,120	\$11,120
Muscat Brown (Red Front)	\$700	100%				\$3,381	\$3,381
Petit Verdot	\$3,034	87%	13.6 100%	\$1,000	\$3,575	\$46,910	\$129,624
Pinot Noir	\$975	97%	11.7 79%	\$595	\$1,534	\$739,460	\$952,327
Ruby Cabernet	\$1,100	100%	14.0 100%			\$14,190	\$14,190
Sangiovese	\$1,720	100%	13.4 100%			\$169,321	\$177,919
Shiraz	\$1,922	99%	13.8 80%	\$988	\$5,000	\$32,247,850	\$39,494,334
Tempranillo	\$1,825	100%				\$912	\$10,512
Tinta Amarella	\$860	100%	13.6 100%			\$20,635	\$20,635
Tinta Cao	\$750	100%	13.0 100%			\$12,120	\$12,120
Tinta Molle	\$1,300	100%	12.3 100%			\$19,188	\$19,188
Touriga	\$1,300	100%	13.3 100%			\$87,854	\$104,754
Zinfandel	\$2,150	100%	12.2 100%			\$18,168	\$20,318
Total RED						\$47,898,946	\$59,914,906

* Note: this price does not include end use or other bonuses not paid at the weighbridge

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

BAROSSA VALLEY PRICE AND BAUME DATA (WHITE) - VINTAGE 2001

Table 3.5

Variety	weighted average		lowest price	highest price	estimated total value	
	weighbridge price*	weighted average baumé			purchased grapes	total grapes
Chardonnay	\$989 100%	13.0 83%	\$600	\$2,500	\$4,565,618	\$5,595,669
Chenin Blanc	\$556 100%	10.6 67%	\$325	\$900	\$607,024	\$612,761
Colombard	\$650 100%	11.7 100%			\$5,976	\$5,976
Crouchen	\$266 100%	11.5 91%	\$260	\$280	\$6,998	\$6,998
Doradillo	\$369 100%	11.9 100%			\$1,246	\$2,675
Muscadelle (Tokay)	\$563 100%	11.0 84%	\$350	\$6,334	\$191,863	\$215,877
Muscat Blanc (Frontignac)	\$553 100%	12.9 52%	\$400	\$900	\$174,864	\$221,960
Muscat Gordo Blanco	\$363 100%	13.0 100%			\$5,636	\$5,636
Other white	\$495 100%	13.5 13%			\$49,280	\$51,421
Palomino	\$360 100%	11.2 77%	\$260	\$500	\$19,573	\$41,520
Pedro Ximenes	\$288 89%	12.6 75%	\$250	\$500	\$35,399	\$55,353
Riesling	\$841 99%	11.5 78%	\$480	\$1,687	\$1,763,276	\$2,280,481
Sauvignon Blanc	\$889 99%	10.8 84%	\$700	\$1,065	\$581,523	\$769,856
Semillon	\$910 100%	12.3 72%	\$500	\$1,346	\$6,366,838	\$7,062,973
Sylvaner	\$428 100%	9.2 100%			\$14,966	\$14,966
Traminer	\$645 80%	12.6 52%	\$505	\$800	\$52,781	\$59,877
Trebbiano	\$355 100%	11.5 96%	\$250	\$400	\$7,143	\$7,143
Verdelho	\$1,300 100%	13.6 100%			\$24,635	\$24,635
Total WHITE					\$14,474,639	\$17,035,779

* Note: this price does not include end use or other bonuses not paid at the weighbridge

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

BAROSSA VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2002 TO 2006

Table 3.6

Variety	2002		2003		2004		2005		2006	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	0	0	5	0	10	0	14	0	14	0
Black Muscat	11	11	11	11	11	11	11	11	11	11
Cabernet Franc	536	503	546	530	556	541	556	549	556	556
Cabernet Sauvignon	7970	8626	9390	9727	10402	10424	11075	11067	11519	11508
Grenache	4241	3530	3615	3653	3789	3788	3989	3974	4045	4040
Malbec	175	128	157	128	181	152	205	176	222	193
Mataro (Mouvedre)	663	663	703	693	756	730	819	759	857	773
Merlot	1588	2151	1969	2543	2335	2883	2590	3063	2809	3262
Meunier	15	15	15	15	15	15	15	15	15	15
Nebbiolo	10	5	12	5	41	29	65	53	82	70
Other red	41	35	41	35	41	35	41	35	41	35
Petit Verdot	67	48	74	53	107	82	135	106	135	106
Pinot Noir	974	465	766	468	751	468	751	468	751	468
Ruby Cabernet	12	0	12	0	12	0	12	0	12	0
Sangiovese	106	55	133	80	100	85	100	85	100	85
Shiraz	23547	24685	26938	28034	29792	29948	31933	31750	32896	33204
Tempranillo	9	30	54	54	143	136	218	220	244	237
Tinta Cao	20	20	20	20	20	20	20	20	20	20
Tinta Molle	15	0	15	0	15	0	15	0	15	0
Touriga	101	10	92	10	92	10	92	10	92	10
Zinfandel	20	28	55	57	69	74	77	79	77	79
Total RED	40118	41008	44622	46116	49237	49431	52733	52440	54513	54672
WHITE										
Chardonnay	6124	7627	6106	8225	6292	8859	6354	9068	6283	9256
Chenin Blanc	910	668	573	533	558	533	558	533	559	534
Colombard	10	10	10	10	10	10	10	10	10	10
Marsanne	10	10	10	10	10	10	10	10	10	10
Muscadelle (Tokay)	381	170	225	165	202	165	202	165	202	165
Muscat Blanc (Frontignac)	424	224	383	236	373	246	346	256	346	266
Other white	105	54	101	59	96	63	99	66	99	66
Palomino	147	115	115	115	115	115	115	115	115	115
Pedro Ximenes	228	166	194	166	189	166	189	166	189	166
Riesling	3469	4065	3727	4546	3884	4833	4420	5294	4564	5621
Sauvignon Blanc	1114	1042	1107	1155	1125	1172	1133	1193	1148	1211
Semillon	9337	10167	9418	10527	9483	9910	9553	10977	9484	11097
Traminer	96	148	96	158	96	163	96	168	91	168
Verdelho	24	0	30	0	36	0	36	0	36	0
Viognier	4	136	31	136	135	146	219	220	237	240
Total WHITE	22383	24602	22126	26041	22604	26391	23339	28241	23372	28925

BAROSSA VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1997 - 2006

Figure 3.1

