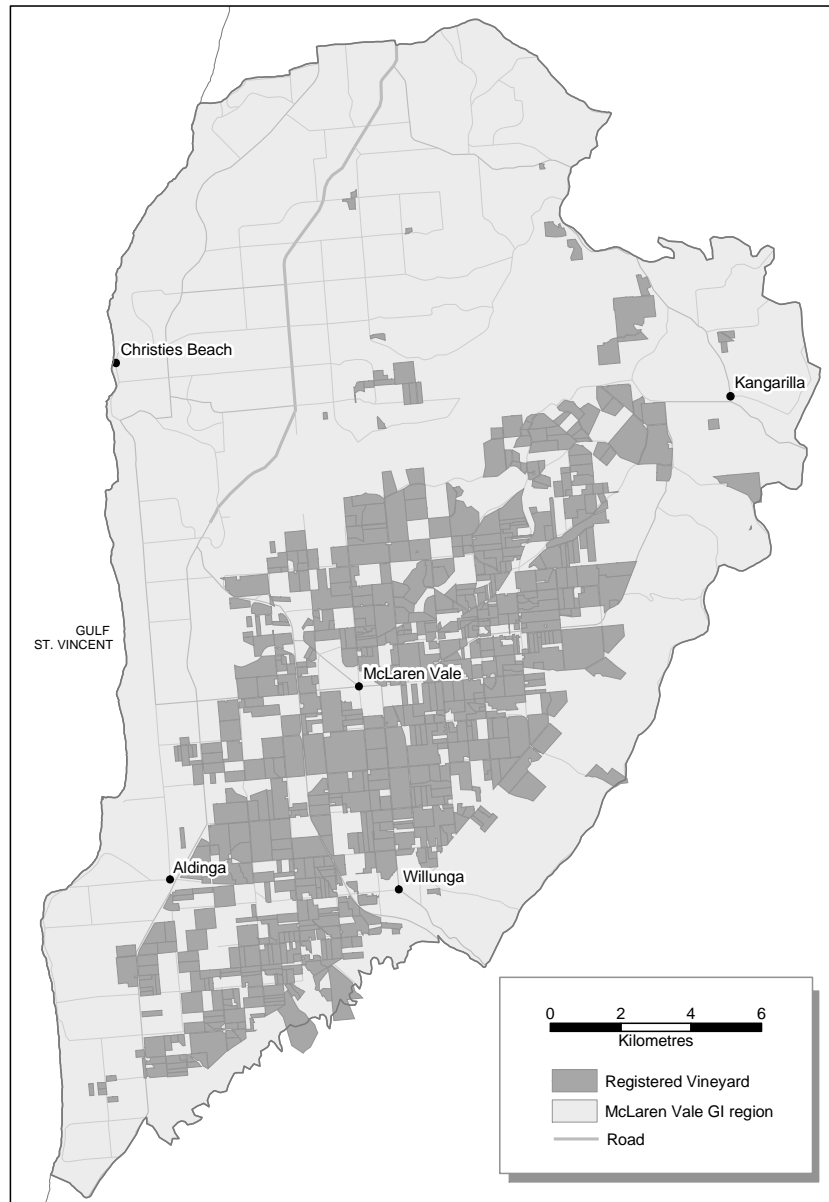


## MCLAREN VALE VINTAGE OVERVIEW



### *Vintage report*

Despite the trials and tribulations that were part of vintage this year the wines, especially the reds, while limited in quantity, will lack nothing in quality.

Windy conditions during flowering and fruit set in the spring of 2002, and the worst drought in over 100 years affected yields, with pre-vintage yield estimates down by 5% to 20% on an average year. Yields were further affected when rains hit in February causing some smaller berries to split and shrivel, resulting in a reduction in bunch weight of 30% – 60%. These factors have combined to reduce yields in the worst instances by more than 50%.

The steady breezes off the Gulf of St Vincent left the vineyards free of diseases. Deep rooted vines, older vines and vines in the eastern end of the region suffered less from the dry conditions.

The shrivelling of the split berries and low crops caused baumé levels to rise rapidly to 15 or 16 degrees in a matter of weeks. This drastic increase caused a flurry in the wineries as the winemakers tried to find space for all the ripening fruit. A great deal of the fruit was picked at 14.5 baumé and higher, and some of the berries rehydrated during vinification causing alcohol levels to reach 17%.

Winemakers' comments focus on the limited quantities but the incredible flavour and fantastic colour – the result of perfect ripening conditions from veraison to harvest. Shiraz is showing spicy pepper characteristics and Cabernet Sauvignon has nice depth and fullness.

*McLaren Vale Grape Wine & Tourism Association*

### *Overview of vintage statistics*

There were 43,452 tonnes crushed from McLaren Vale vineyards in 2003 – a reduction of 6,000 tonnes (15%) on 2002. Despite this, there was a slight surplus of red varieties - mainly Grenache, Merlot and Cabernet Sauvignon. Conversely, there was a 20% shortfall in white varieties overall, with a 25% shortfall in Chardonnay and an oversupply of Semillon.

The calculated average purchase value for all the major red varieties was down by \$100 per tonne or more compared with 2002, while the average value of Chardonnay was very similar to last year's value.

The forecast for the next five years is for an increase in production of red varieties to 50,000 tonnes in 2004, followed by a slight and gradual decline over the next four years. There is expected to be a short-term surplus of 12,000 tonnes, with a slight shortfall (made up of Shiraz and Pinot Noir) in the long-term. The forecast demand for Cabernet Sauvignon, Merlot and Shiraz has been revised downward substantially since the 2002 survey. In the case of white varieties, production is expected to remain at around 12,000 tonnes, while the demand increases each year, producing a shortfall of 4,000 tonnes or 30% by 2008. This is almost entirely in Chardonnay.

There was a 3% net increase in plantings in McLaren Vale in 2002, made up almost entirely of Shiraz and Chardonnay.

## MCLAREN VALE CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 11.1

### Area in hectares by year planted

Variety	Pre-99	1999	2000	2001	2002	Total	% planted 2002
<b>RED WINEGRAPES</b>							
BARBERA	1	2	4	0	0	7	0%
CABERNET FRANC	35	3	1	0	0	38	0%
CABERNET SAUVIGNON	1038	166	30	54	16	1304	1%
GRENACHE	346	41	11	10	2	408	0%
MALBEC	7	0	0	0	0	7	0%
MATARO	11	1	3	2	3	21	15%
MERLOT	231	55	16	7	10	320	3%
NEBBIOLO	3	6	0	0	0	9	0%
PETIT VERDOT	27	15	10	11	0	63	0%
PINOT NOIR	83	7	0	0	0	90	0%
SANGIOVESE	7	26	4	1	0	38	0%
SHIRAZ	2037	439	183	218	91	2968	3%
TEMPRANILLO	2	8	2	7	1	20	6%
OTHER RED	9	0	4	2	0	15	0%
<b>TOTAL RED WINEGRAPES</b>	<b>3835</b>	<b>770</b>	<b>267</b>	<b>313</b>	<b>123</b>	<b>5308</b>	<b>2%</b>
<b>WHITE WINEGRAPES</b>							
CHARDONNAY	621	4	0	19	31	675	5%
CHENIN BLANC	23	0	0	0	2	25	9%
MARSANNE	4	0	0	2	0	6	0%
RIESLING	83	0	0	3	0	87	0%
ROUSSANNE	8	0	0	2	0	9	0%
SAUVIGNON BLANC	116	0	1	2	3	122	2%
SEMILLON	138	0	0	1	0	139	0%
VERDELHO	14	3	5	0	0	22	0%
VIOGNIER	17	1	3	4	2	26	6%
OTHER WHITE	12	0	0	0	2	14	14%
<b>TOTAL WHITE WINEGRAPES</b>	<b>1037</b>	<b>8</b>	<b>8</b>	<b>32</b>	<b>39</b>	<b>1125</b>	<b>3%</b>
ROOTSTOCK BLOCK	1	3	0	0	0	4	0%
<b>TOTAL ALL VARIETIES</b>	<b>4873</b>	<b>781</b>	<b>275</b>	<b>345</b>	<b>162</b>	<b>6437</b>	<b>3%</b>

## MCLAREN VALE TONNES CRUSHED BY VARIETY - VINTAGE 2003

Table 11.2

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)		
							Own	Other	Preferred
<b>RED</b>									
Barbera	33	0	33	8	0%	409%	2	0	1
Cabernet Franc	61	211	272	204	78%	134%	8	9	11
Cabernet Sauvignon	2096	5847	7943	6735	74%	118%	31	36	49
Chambourcin	23	0	23	30	0%	75%	1	0	1
Grenache	843	2156	2999	2235	72%	134%	16	21	29
Malbec	76	10	86	60	11%	144%	3	3	4
Mataro (Mouvedre)	96	11	107	106	11%	101%	8	2	6
Merlot	723	1622	2345	1649	69%	142%	21	21	35
Nebbiolo	22	0	22	10	0%	220%	2	0	1
Other red	29	53	83	63	78%	97%	2	2	4
Petit Verdot	206	287	493	234	58%	211%	6	9	12
Pinot Noir	142	825	967	1308	85%	74%	5	7	8
Sangiovese	182	14	197	172	7%	114%	8	1	8
Shiraz	4424	14627	19051	20120	77%	95%	33	43	57
Tempranillo	41	13	55	39	25%	141%	5	5	5
Zinfandel	2	7	9	15	74%	61%	1	1	1
<b>Total RED</b>	<b>8999</b>	<b>25686</b>	<b>34684</b>	<b>32987</b>	<b>74%</b>	<b>105%</b>			
<b>WHITE</b>									
Chardonnay	1261	4260	5521	7415	77%	74%	24	21	35
Chenin Blanc	95	86	181	185	48%	98%	1	6	3
Marsanne	36	23	60	100	39%	60%	1	1	1
Muscat Blanc (Frontignac)	10	12	22	11	54%	204%	2	1	2
Other white	18	23	41	58	10%	67%	1	1	1
Pedro Ximenes	0	27	27	15	100%	182%	0	1	1
Riesling	145	610	755	803	81%	94%	7	9	11
Roussanne	28	0	28	60	0%	46%	1	0	1
Sauvignon Blanc	143	273	415	846	66%	49%	13	12	19
Semillon	197	1224	1420	1084	86%	131%	13	19	27
Traminer	0	35	35	87	100%	40%	0	2	2
Verdelho	69	84	152	215	55%	71%	4	5	6
Viognier	54	56	109	184	51%	59%	5	2	5
<b>Total WHITE</b>	<b>2055</b>	<b>6712</b>	<b>8767</b>	<b>11064</b>	<b>77%</b>	<b>79%</b>			
<b>Total for region</b>	<b>11054</b>	<b>32398</b>	<b>43452</b>	<b>44051</b>					

## MCLAREN VALE CROP VALUE DATA - VINTAGE 2003

Table 11.3

Variety (1)	Grower grown	Total crushed	estimated total value		lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
			purchased grapes	total grapes				
<b>RED</b>								
Cabernet Franc	211	272	\$219,150	\$282,406	\$666	\$1,660	\$1,039	100%
Cabernet Sauvignon	5847	7943	\$9,437,415	\$12,819,988	\$1,000	\$10,000	\$1,614	100%
Cinsaut	15	15	\$9,150	\$9,150			\$610	100%
Grenache	2156	2999	\$3,425,005	\$4,764,457	\$600	\$10,000	\$1,589	100%
Malbec	10	86	\$17,854	\$156,532	\$1,500	\$2,000	\$1,816	100%
Mataro (Mouvedre)	11	107	\$16,045	\$152,022			\$1,421	100%
Merlot	1622	2345	\$2,510,050	\$3,628,685	\$900	\$2,900	\$1,547	100%
Other red	38	49	\$58,449	\$74,520			\$1,537	92%
Petit Verdot	287	493	\$481,421	\$825,662	\$1,150	\$2,500	\$1,675	100%
Pinot Noir	825	967	\$965,002	\$1,130,871	\$500	\$1,500	\$1,169	100%
Sangiovese	14	197	\$26,041	\$353,763			\$1,800	100%
Shiraz	14627	19051	\$26,407,929	\$34,395,297	\$770	\$10,000	\$1,805	100%
Tempranillo	13	55	\$21,374	\$87,161	\$1,150	\$2,400	\$1,586	100%
Tinta Cao	0	4	\$288	\$9,072			\$2,400	100%
Zinfandel	7	9	\$12,692	\$17,252			\$1,900	100%
<b>Total RED</b>	<b>25686</b>	<b>34592</b>	<b>\$43,607,865</b>	<b>\$58,706,839</b>				
<b>WHITE</b>								
Chardonnay	4260	5521	\$6,052,400	\$7,844,615	\$1,000	\$2,250	\$1,421	100%
Chenin Blanc	86	181	\$71,349	\$149,955	\$500	\$1,800	\$827	100%
Colombard	11	11	\$9,240	\$9,240			\$862	100%
Crouchen	10	10	\$7,028	\$7,028			\$700	100%
Marsanne	23	60	\$42,048	\$107,172			\$1,800	100%
Muscat Blanc (Frontignac)	12	22	\$6,848	\$12,789			\$571	100%
Other white	2	20	\$432	\$4,320			\$216	100%
Pedro Ximenes	27	27	\$15,048	\$15,048			\$550	100%
Riesling	610	755	\$730,898	\$904,032	\$550	\$1,500	\$1,198	99%
Sauvignon Blanc	273	415	\$329,581	\$502,342	\$891	\$1,500	\$1,209	100%
Semillon	1224	1420	\$1,126,516	\$1,307,680	\$450	\$1,800	\$921	100%
Traminer	35	35	\$35,352	\$35,352			\$1,010	100%
Verdelho	84	152	\$88,897	\$162,158	\$850	\$1,232	\$1,064	100%
Viognier	56	109	\$107,493	\$210,955			\$1,928	100%
<b>Total WHITE</b>	<b>6712</b>	<b>8740</b>	<b>\$8,623,130</b>	<b>\$11,272,687</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.

## MCLAREN VALE ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2004 TO 2008

Table 11.4

Variety	2004		2005		2006		2007		2008	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
<b>RED</b>										
Barbera	44	19	50	25	56	31	59	34	30	5
Cabernet Franc	433	242	382	252	387	257	387	257	339	257
Cabernet Sauvignon	11889	7544	11848	8188	11848	9082	11696	9433	11578	9667
Chambourcin	35	30	35	30	35	30	35	30	35	30
Grenache	3268	2531	3303	2617	3280	2867	3240	2869	3112	2842
Malbec	83	60	83	60	75	52	86	52	86	52
Mataro (Mouvedre)	156	112	162	118	168	124	171	127	140	96
Merlot	2850	1641	3005	2166	3165	2230	3230	2289	3166	2374
Nebbiolo	71	49	71	49	71	49	71	49	22	0
Other red	98	71	109	79	117	88	125	95	95	83
Petit Verdot	605	250	631	278	641	288	629	276	639	308
Pinot Noir	898	1387	930	1430	915	1461	925	1504	933	1516
Sangiovese	268	216	284	232	290	238	293	241	214	162
Shiraz	29960	23796	29380	26158	29721	28555	29171	30547	27170	31556
Tempranillo	157	101	177	120	183	126	175	133	107	65
Touriga	6	6	10	10	12	12	14	14	0	0
Zinfandel	15	15	15	15	15	15	15	15	15	15
<b>Total for RED</b>	<b>50836</b>	<b>38070</b>	<b>50473</b>	<b>41827</b>	<b>50978</b>	<b>45505</b>	<b>50319</b>	<b>47965</b>	<b>47681</b>	<b>49026</b>
<b>WHITE</b>										
Chardonnay	7707	9447	8062	10337	8227	11219	8282	11872	8324	11994
Chenin Blanc	326	220	225	200	198	210	159	220	159	230
Colombard	24	28	25	28	26	28	32	33	33	35
Marsanne	110	110	110	110	110	110	110	110	110	110
Muscat Blanc (Frontignac)	29	11	29	11	29	11	29	11	29	11
Other white	39	30	39	30	39	30	39	30	39	30
Riesling	932	898	903	912	869	881	881	884	805	887
Roussanne	35	60	75	75	115	75	115	75	115	75
Sauvignon Blanc	837	1151	851	1176	876	1206	878	1251	932	1278
Semillon	1708	1206	1608	1255	1568	1256	1476	1190	1656	1192
Traminer	40	144	40	153	40	159	40	167	29	173
Verdelho	267	239	222	236	235	240	235	243	244	246
Viognier	181	202	211	221	214	224	214	224	214	224
<b>Total for WHITE</b>	<b>12234</b>	<b>13746</b>	<b>12400</b>	<b>14744</b>	<b>12545</b>	<b>15649</b>	<b>12490</b>	<b>16310</b>	<b>12689</b>	<b>16485</b>
<b>Total for region</b>	<b>63070</b>	<b>51816</b>	<b>62873</b>	<b>56571</b>	<b>63523</b>	<b>61154</b>	<b>62809</b>	<b>64275</b>	<b>60370</b>	<b>65511</b>

# MCLAREN VALE PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2008

Figure 11.1

Past production and projections (major varieties)

