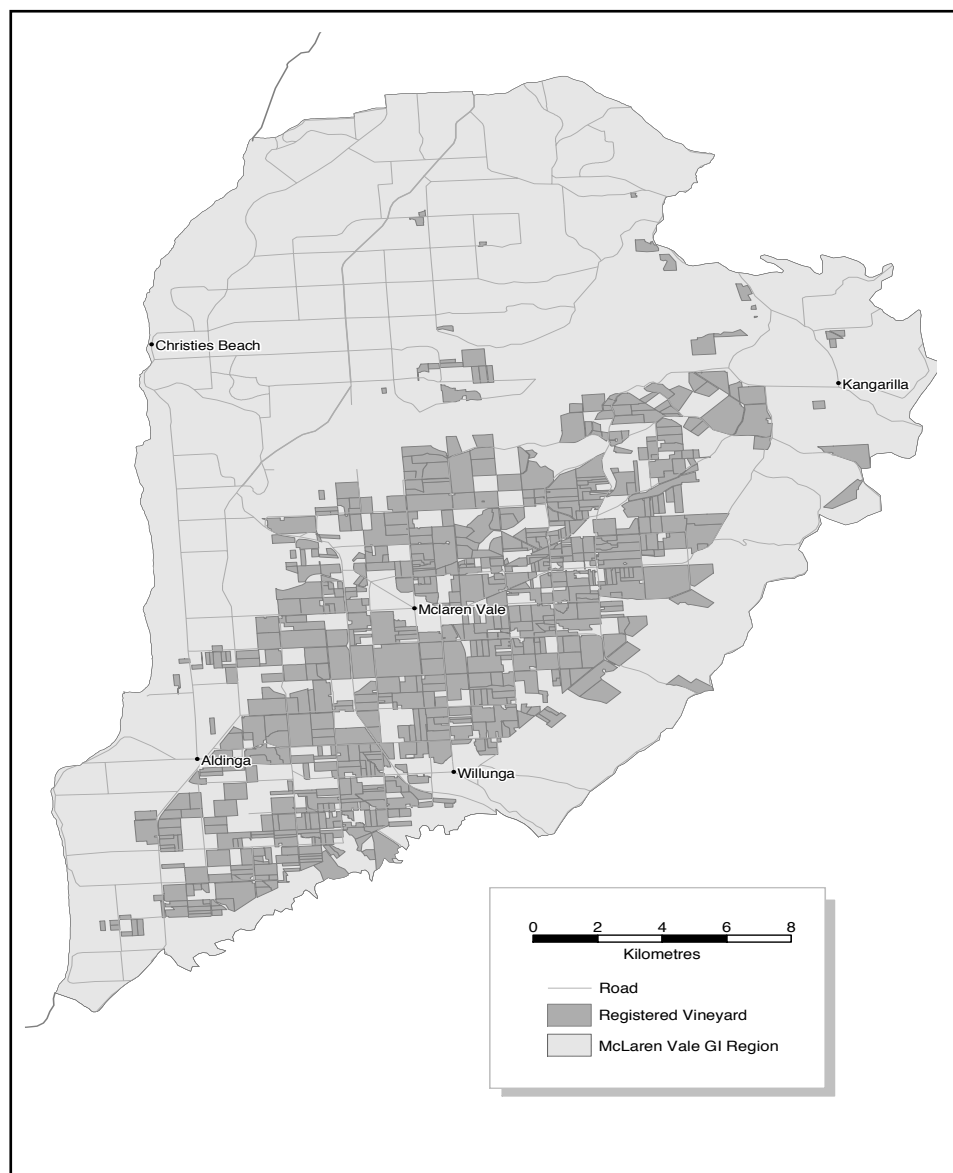




McLaren Vale

MCLAREN VALE VINTAGE OVERVIEW



Vintage report

After a reasonably wet winter across the McLaren Vale region, the vines burst well with good early shoot growth. Rain during veraison played havoc with some Riesling and Semillon around the area. McLaren Vale had a milder than usual summer with very few days of extreme temperatures, allowing canopies to be maintained right through to vintage with minimal irrigation. This resulted in an excellent, even ripening period; as a consequence vintage started up to two weeks earlier with the first whites coming off very early in February.

Attaining sugar ripeness was definitely not an issue this year, with very high Baumés being recorded before the onset of flavor ripeness. Wineries were put under pressure with the fruit appearing to ripen all together – particularly Shiraz and Cabernet Sauvignon, which make up in excess of 70% of McLaren Vale's production. Anecdotal reports suggest that vintage was completed in seven weeks compared with the usual average 10-12 weeks.

Overall wineries are reasonably pleased with the quality of the fruit and some have commented that the Shiraz and Cabernet Sauvignon are looking particularly good this year. Grenache was also of a very high standard, despite multiple reports of botrytis infections as the Baumés climbed.

Richard McGeachy
Viticulture Officer, McLaren Vale Grape, Wine and Tourism Association

Overview of vintage statistics

McLaren Vale crushed 65,151 tonnes in 2005 – 9% less than the 2004 record harvest. 77% of the crush was red varieties – compared with 61% across the state generally. Total income to growers was down by 18%, and the total value of grapes to the region decreased from \$98 million in 2004 to \$82 million. The average purchase value for Shiraz was down by \$100 per tonne, while Grenache and Chardonnay dropped by around \$150 per tonne.

The forecast intake requirement for 2006 is 61,000 tonnes, 7% less than the 2005 vintage. Demand is expected to increase to 65,000 tonnes by 2010, with Shiraz accounting for 45% of the preferred intake (next largest is Chardonnay at 19%).

There was very little new planting of red varieties in McLaren Vale in 2004 – a total of 52 hectares (1%). There were 63 hectares of white varieties (5%) planted – mainly Chardonnay and Viognier.

Based on the current vineyard area in the region, and using estimated yield figures of 9t/ha for reds and 10t/ha for whites, the estimated production for McLaren Vale in 2008 is around 62,000 tonnes. This falls short of the preferred intake for that year (65,000t). There is an estimated surplus of Cabernet Sauvignon (3500t), but shortfalls in Chardonnay (5000t) and Grenache (1200t). Overall, there is a 48% expected shortfall of white varieties, and a 5% surplus of reds.

MCLAREN VALE CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 11.1

Variety	Current area in hectares by year planted						Total area	% planted in 2004
	Pre-2000	2000	2001	2002	2003	2004		
RED WINEGRAPES								
CABERNET FRANCO	26	1	0	0	0	0	26	0%
CABERNET SAUVIGNON	1180	35	48	16	7	3	1288	0%
GRENACHE	374	11	6	9	1	1	402	0%
MALBEC	9	0	0	0	0	0	9	0%
MATARO (MOUVEDRE)	12	3	2	3	1	1	22	4%
MERLOT	287	16	7	10	0	2	322	1%
NEBBIOLO	9	0	0	0	0	0	9	0%
PETIT VERDOT	41	14	13	0	2	0	70	0%
PINOT NOIR	82	0	0	0	0	0	82	0%
SAGRANTINO	0	0	0	0	0	4	4	100%
SANGIOVESE	33	4	2	0	1	3	42	7%
SHIRAZ	2550	211	261	123	38	34	3218	1%
TEMPRANILLO	10	2	7	1	1	2	24	7%
OTHER RED	12	8	2	0	1	3	26	16%
TOTAL RED WINEGRAPES	4625	304	349	163	51	52	5544	1%
WHITE WINEGRAPES								
CHARDONNAY	599	0	17	30	44	41	731	6%
CHENIN BLANC	17	0	0	4	0	0	20	0%
MARSANNE	12	0	1	0	0	0	14	0%
RIESLING	89	0	3	0	0	0	92	0%
ROUSSANNE	8	0	2	0	0	1	10	10%
SAUVIGNON BLANC	106	1	2	3	7	8	126	7%
SEMILLON	130	0	1	0	0	0	131	0%
VERDELHO	17	5	0	2	0	0	23	0%
VIIGNIER	25	7	4	2	2	10	50	21%
OTHER WHITE	10	0	0	1	0	1	13	30%
TOTAL WHITE WINEGRAPES	1012	12	30	41	52	63	1210	5%
ROOTSTOCK BLOCK	4	0	0	0	0	0	4	0%
TOTAL ALL VARIETIES	5641	316	379	203	103	115	6758	2%



MCLAREN VALE TONNES CRUSHED BY VARIETY (RED) - VINTAGE 2005

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) for		
							Own	Other	Preferred
RED									
Barbera	53	0	53	34	0%	159%	4	0	3
Cabernet Franc	71	145	216	178	67%	121%	5	11	11
Cabernet Sauvignon	3,347	6,827	10,173	8,146	67%	125%	33	37	50
Grenache	1,409	2,233	3,641	3,074	61%	118%	13	26	32
Malbec	57	10	67	59	15%	114%	3	2	3
Mataro	85	35	120	326	29%	37%	6	7	10
Merlot	1,215	2,546	3,762	3,177	68%	118%	22	28	38
Nebbiolo	60	0	60	59	0%	102%	3	0	2
Other red	92	14	106	139	13%	76%	9	3	11
Petit Verdot	256	476	731	598	65%	122%	7	12	14
Pinot Noir	117	1,105	1,221	525	90%	232%	4	8	6
Ruby Cabernet	16	0	16	16	0%	100%	1	0	1
Sangiovese	247	121	368	331	33%	111%	8	4	9
Shiraz	7,513	22,157	29,670	26,535	75%	112%	37	53	65
Tempranillo	106	39	145	128	27%	113%	5	6	8
Unsound red	0	25	25	25	100%	100%	0	1	1
Zinfandel	4	15	19	20	78%	95%	1	1	1
Total RED	14,647	35,747	50,394	43,369	71%	116%			
<i>% of grand total</i>			77%	74%					

MCLAREN VALE TONNES CRUSHED BY VARIETY (WHITE) - VINTAGE 2005

Table 11.2 cont.d

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
WHITE									
Chardonnay	2,071	7,224	9,296	10,581	78%	88%	25	31	41
Chenin Blanc	99	113	212	180	53%	118%	2	1	2
Colombard	0	11	11	11	100%	100%	0	1	1
Marsanne	43	72	115	130	63%	88%	1	2	2
Muscat Blanc	6	18	24	30	75%	79%	2	2	4
Muscat Gordo Blanco	0	2	2	3	100%	80%	0	1	1
Other white	29	12	41	52	29%	79%	2	1	3
Pinot Gris	7	0	7	14	0%	50%	1	0	2
Riesling	436	593	1,030	954	58%	108%	11	11	16
Rousanne	42	59	101	90	59%	112%	1	2	2
Sauvignon Blanc	582	823	1,405	1,458	59%	96%	13	16	23
Semillon	491	1,510	2,001	1,488	75%	134%	10	22	24
Traminer	0	44	44	40	100%	111%	0	2	2
Verdelho	101	72	173	187	42%	93%	5	2	7
Viognier	74	222	296	382	75%	77%	4	7	10
Total WHITE	3,981	10,776	14,757	15,599	73%	95%			
<i>% of grand total</i>			23%	26%					
Grand Total	18,629	46,523	65,151	58,968	71%	110%			



MCLAREN VALE CROP VALUE DATA - VINTAGE 2005

Table 11.3

Variety	Grower grown (t)	Total crushed (t)	Estimated total value purchased grapes	Estimated total value total grapes	Lowest price ¹	Highest price	Calc average purchase value per tonne	qualifier ²
RED								
Barbera	0	53	\$0	\$69,992			\$0	
Cabernet Franc	145	216	\$141,711	\$211,215	\$800	\$1,400	\$979	94%
Cabernet Sauvignon	6,827	10,173	\$8,302,404	\$12,372,547	\$100	\$3,200	\$1,216	98%
Grenache	2,233	3,641	\$2,644,291	\$4,312,953	\$200	\$3,000	\$1,184	99%
Malbec	10	67	\$9,760	\$63,592			\$951	100%
Mataro	35	120	\$44,561	\$153,353	\$700	\$2,250	\$1,273	100%
Merlot	2,546	3,762	\$2,483,988	\$3,669,468	\$250	\$2,500	\$975	100%
Nebbiolo	0	60	\$0	\$78,956			\$0	
Other red	14	122	\$18,079	\$169,228		\$2,400	\$1,293	100%
Petit Verdot	476	731	\$535,377	\$823,096	\$300	\$1,600	\$1,126	89%
Pinot Noir	1,105	1,221	\$1,069,975	\$1,183,019	\$400	\$1,300	\$969	97%
Sangiovese	121	368	\$146,149	\$445,712	\$900	\$1,680	\$1,211	80%
Shiraz	22,157	29,670	\$30,479,845	\$40,814,844	\$150	\$6,000	\$1,376	98%
Tempranillo	39	145	\$58,016	\$215,201	\$800	\$2,200	\$1,485	99%
Zinfandel	15	19	\$25,986	\$33,137			\$1,744	100%
Total RED	35,747	50,394	\$45,993,052	\$64,649,222				
WHITE								
Chardonnay	7,224	9,296	\$8,994,413	\$11,573,444	\$150	\$2,000	\$1,245	98%
Chenin Blanc	113	212	\$99,000	\$185,735			\$876	100%
Colombard	11	11	\$7,118	\$7,118			\$636	100%
Marsanne	72	115	\$110,796	\$176,098			\$1,531	100%
Muscat Blanc	18	24	\$10,940	\$14,591			\$619	100%
Muscat Gordo Blanco	2	2	\$2,040	\$2,040			\$850	100%
Other white	12	41	\$6,606	\$22,556			\$550	100%
Pinot Gris	0	7	\$0	\$8,315			\$0	
Riesling	593	1,030	\$599,723	\$1,040,784	\$350	\$1,400	\$1,011	100%
Roussanne	59	101	\$78,536	\$133,615			\$1,325	100%
Sauvignon Blanc	823	1,405	\$959,352	\$1,638,537	\$400	\$1,700	\$1,166	99%
Semillon	1,510	2,001	\$1,213,281	\$1,607,772	\$150	\$1,200	\$803	98%
Traminer	44	44	\$35,112	\$35,112			\$795	100%
Verdelho	72	173	\$83,252	\$200,152			\$1,156	100%
Viognier	222	296	\$409,095	\$545,300	\$700	\$2,000	\$1,845	97%
Total WHITE	10,776	14,757	\$12,609,264	\$17,191,167				
Total all varieties	46,523	65,151	\$58,602,316	\$81,840,389				

¹ The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

² This indicates the percentage of purchased fruit for which pricing information was supplied.

MCLAREN VALE ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2006 TO 2010

Table 11.4

Variety	2006			2007			2008			2009			2010		
	estimated	preferred	qualifier ¹	estimated	preferred	qualifier	estimated	preferred	qualifier	estimated	preferred	qualifier	estimated	preferred	qualifier
RED															
Barbera	45	47	100%	48	50	100%	51	51	100%	54	51	100%	54	51	100%
Cabernet Franc	233	188	98%	234	189	98%	188	143	83%	173	128	73%	173	128	73%
Cabernet Sauvignon	10,961	8,829	99%	10,851	9,205	99%	9,181	8,057	97%	8,539	7,732	94%	8,445	7,664	94%
Grenache	4,405	4,352	100%	4,524	4,557	99%	4,771	4,842	99%	4,782	4,851	99%	4,793	4,862	99%
Malbec	61	58	90%	61	58	90%	80	78	90%	20	18	26%	18	18	21%
Mataro	143	323	100%	156	315	100%	170	317	100%	178	312	100%	178	312	100%
Merlot	3,223	2,633	97%	3,085	2,701	95%	2,831	2,577	95%	2,672	2,609	90%	2,645	2,625	90%
Nebbiolo	55	65	100%	55	66	100%	55	65	100%	55	65	100%	55	65	100%
Other red	124	160	100%	140	162	100%	141	144	93%	145	144	93%	145	144	93%
Petit Verdot	683	536	98%	701	565	98%	559	406	91%	560	413	90%	566	414	90%
Pinot Noir	1,184	706	91%	1,188	709	91%	1,160	682	88%	983	517	78%	983	517	78%
Ruby Cabernet	14	14	100%	14	14	100%	14	14	100%	14	14	100%	14	14	100%
Sangiovese	348	314	94%	332	322	86%	340	344	86%	313	324	78%	313	324	78%
Shiraz	31,127	27,176	98%	30,573	29,129	98%	29,185	29,441	96%	26,694	28,813	92%	26,954	29,599	92%
Tempranillo	186	158	100%	182	175	100%	187	176	100%	174	201	100%	177	201	100%
Zinfandel	26	26	100%	38	38	100%	50	50	100%	50	50	100%	50	50	100%
Total RED	52,819	45,584		52,183	48,254		48,961	47,386		45,405	46,241		45,561	46,987	
WHITE															
Chardonnay	8,005	10,161	99%	8,307	10,805	99%	9,347	12,267	97%	9,131	12,520	94%	9,233	12,708	94%
Chenin Blanc	190	180	100%	210	190	100%	220	210	100%	220	190	100%	220	200	100%
Colombard	13	13	100%	13	13	100%	13	13	100%	13	13	100%	13	13	100%
Marsanne	130	130	100%	130	130	100%	130	130	100%	130	130	100%	130	130	100%
Muscat Blanc	29	31	100%	29	31	100%	30	31	100%	30	31	100%	31	31	100%
Other white	49	55	100%	55	55	100%	60	57	100%	60	30	100%	60	35	100%
Pinot Gris	7	14	100%	7	14	100%	7	15	100%	7	14	100%	7	14	100%
Riesling	978	1,017	95%	929	998	95%	868	882	95%	872	847	95%	872	847	95%
Roussanne	97	92	100%	99	94	100%	101	96	100%	101	96	100%	101	101	100%
Sauvignon Blanc	1,674	1,859	100%	1,686	1,905	95%	1,660	2,022	95%	1,632	1,998	94%	1,632	1,998	94%
Semillon	1,416	1,266	97%	1,367	1,255	96%	1,285	1,196	95%	1,289	1,200	95%	1,283	1,204	95%
Traminer	328	328	100%	342	342	100%	356	356	100%	356	356	100%	356	356	100%
Verdelho	196	186	100%	200	200	100%	203	203	100%	108	108	50%	108	108	50%
Viognier	345	415	98%	361	434	98%	365	446	98%	366	452	98%	367	453	98%
Total WHITE	13,457	15,746		13,735	16,465		14,645	17,923		14,314	17,984		14,412	18,197	
Total all varieties	66,276	61,330		65,918	64,719		63,606	65,308		59,719	64,225		59,974	65,184	

¹ This indicates the percentage of crushed fruit in the current vintage for which forecast intake data was supplied.



MCLAREN VALE SUPPLY VS DEMAND FORECASTS 2006 AND 2008

Table 11.5

Variety	2006					2008				
	estimated bearing area (ha) ¹	estimated production (tonnes) ²	preferred intake (tonnes) ³	Difference (tonnes)	% difference	estimated bearing area (ha) ¹	estimated production (tonnes) ²	preferred intake (tonnes) ³	Difference (tonnes)	% difference
Barbera	7	63	47	16	25%	7	63	51	12	19%
Cabernet Franc	26	234	188	46	20%	26	234	143	91	39%
Cabernet Sauvignon	1,278	11502	8,829	2,673	23%	1,288	11592	8,057	3,535	30%
Grenache	400	3600	4,352	-752	-21%	402	3618	4,842	-1,224	-34%
Malbec	9	81	58	23	28%	9	81	78	3	4%
Mataro	20	180	323	-143	-79%	22	198	317	-119	-60%
Merlot	320	2880	2,633	247	9%	322	2898	2,577	322	11%
Nebbiolo	9	81	65	16	20%	9	81	65	16	20%
Other red	6	54	186	-132	-244%	16	144	194	-50	-35%
Petit Verdot	68	612	536	76	12%	70	630	406	224	36%
Pinot Noir	82	738	706	32	4%	82	738	682	56	8%
Ruby Cabernet	3	27	14	13	48%	3	27	14	13	48%
Sangiovese	38	342	314	28	8%	42	378	344	34	9%
Shiraz	3,146	28314	27,176	1,138	4%	3,218	28962	29,441	-479	-2%
Tempranillo	21	189	158	31	16%	24	216	176	40	19%
Red Total	5,433	48897	45,584	3,313	7%	5,544	49896	47,386	2,510	5%
Chardonnay	646	6460	10,161	-3,701	-57%	731	7310	12,267	-4,957	-68%
Chenin Blanc	20	200	180	20	10%	20	200	210	-10	-5%
Marsanne	13	130	130	0	0%	14	140	130	10	7%
Muscat Blanc	3	30	31	-1	-3%	3	30	31	-1	-3%
Muscat Gordo Blanco	1	10	3	7	70%	1	10	3	7	70%
Other white	3	30	65	-35	-117%	4	40	67	-27	-68%
Pinot Gris	1	10	14	-4	-40%	2	20	15	5	25%
Riesling	92	920	1,017	-97	-10%	92	920	882	39	4%
Rousanne	10	100	92	8	8%	10	100	96	4	4%
Sauvignon Blanc	111	1110	1,859	-749	-67%	126	1260	2,022	-762	-60%
Semillon	131	1310	1,266	45	3%	131	1310	1,196	115	9%
Traminer	3	30	328	-298	-993%	3	30	356	-326	-1087%
Verdelho	23	230	186	44	19%	23	230	203	27	12%
Viognier	38	380	415	-35	-9%	50	500	446	54	11%
White Total	1,095	10950	15,746	-4,796	-44%	1,210	12100	17,923	-5,823	-48%
Grand Total	6,528	59847	61,330	-1,483	-2%	6,758	61996	65,308	-3,312	-5%

This table compares estimated future production (supply) - based on planting data - with estimated future demand (preferred intake). This gives a better indication of possible shortfalls and surpluses than comparing estimated with preferred intake, as estimated intake does not necessarily account for all production of a given variety.

(1) Planting data derived from PGIB vineyard register. Bearing area includes plantings more than three years old.

(2) Bearing area multiplied by yield estimate of 9t/ha for reds and 10t/ha for whites.

(3) Taken from the Utilisation and Pricing survey (see previous page).

MCLAREN VALE PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2010

Figure 11.1

Past production and projections (major varieties)

