

McLaren Vale wine region

Regional summary report

2009

Vintage report

The 2009 vintage in McLaren Vale was a “tale of two vales.” A thirteen day heat wave in late January and early February meant a vintage that started early and ended late. What started out as a hot vintage finished with the hallmarks of memorable, cooler years.

Vintage started in the last week of January for whites and the first week of February for Shiraz. Vineyards with later ripening crops on darker or deeper soils and / or at higher elevations reported optimal ripening with very good to excellent results. Cool and dry conditions during berry ripening in most of the district were conducive to excellent flavour, colour and phenolic development.

In general, the timing of the heatwave affected vineyards with lighter canopies and crop loads, those on thin or highly reflective soils and crops in the earlier ripening areas. Crops that were affected by the heatwave were generally not picked. Following the heatwave, optimal conditions for ripening prevailed for the rest of the season.

Because of the early start to the vintage for reds, there were some early season difficulties handling reds and whites simultaneously in the winery but the prolonged season reduced pressure on winery capacity. Overall volume in the region was below average.

The heatwave placed a great deal of pressure on all growers to optimise their irrigation for the conditions. With growers utilising mains and groundwater, restrictions placed a premium on water budgeting. Growers utilising reclaimed water were affected by insufficient water storage.

The region's leading winemakers and grape growers are confident that the 2009 McLaren Vale wines will be of the award winning standard the region has become known for.

Dudley Brown

Chairman, McLaren Vale Grape, Wine and Tourism Association

Overview of vintage statistics

The harvest from McLaren Vale in 2009 was 33,484 tonnes, the lowest for at least 10 years - even below the 2007 harvest. The estimated total value of the grapes fell from \$88 million in 2008 to \$41 million. Despite the record low crush, average prices fell for all major varieties, with Chardonnay - as in many other regions - falling to a record low price for the region.

There were slightly more new plantings in McLaren Vale in spring 2008 (including top-working and replacements) than the previous year (100 hectares) but the total net area did not increase. One third of the new plantings were Shiraz, while Mataro (Mourvedre) increased its total area by 32% to 49 hectares.

The ABARE estimated production from McLaren Vale for 2010 is around 54,000 tonnes. 44,000 tonnes is already committed to the wineries, leaving around 10,000 tonnes uncontracted.

In 2014, the estimated production is 58,000 tonnes, of which a bit over half (31,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 27,000 tonnes – nearly half of the estimated production – as yet uncommitted.

Across the state, assuming "normal" growing conditions, there is expected to be a 120,000 tonne surplus compared with demand in 2014 (see State Summary section).

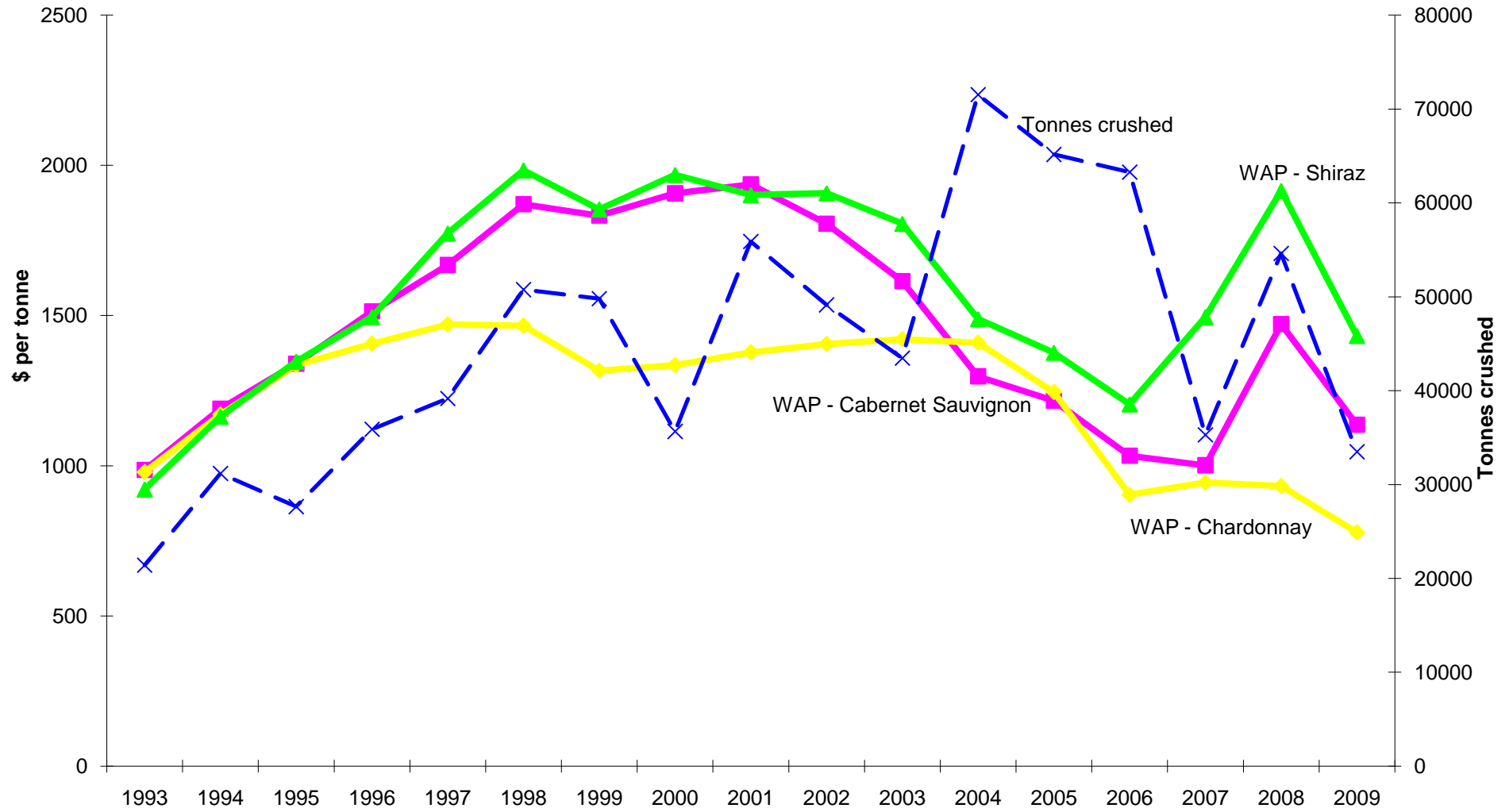
McLaren Vale

Winegrape intake summary - vintage 2009

Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
RED								
Cabernet Franc	35	\$1,000	\$1,500	\$39,496	\$1,121	68	103	\$115,785
Cabernet Sauvignon	3,384	\$450	\$5,284	\$3,845,663	\$1,136	3,094	6,478	\$7,360,918
Grenache	1,257	\$400	\$5,438	\$1,523,456	\$1,212	617	1,874	\$2,271,517
Mataro	87	\$1,000	\$2,500	\$133,275	\$1,533	140	227	\$347,180
Merlot	1,300	\$300	\$1,850	\$1,193,311	\$918	965	2,265	\$2,078,745
Other Red	28	\$1,500	\$1,700	\$44,539	\$1,564	121	150	\$214,021
Petit Verdot	103	\$765	\$1,500	\$120,188	\$1,169	112	215	\$251,261
Pinot Noir	358	\$200	\$2,014	\$418,316	\$1,168	52	410	\$479,288
Sangiovese	83	\$750	\$1,600	\$89,354	\$1,070	231	314	\$336,202
Shiraz	9,462	\$350	\$8,386	\$13,549,066	\$1,432	5,341	14,804	\$21,196,971
Tempranillo	12	\$1,500	\$1,650	\$18,885	\$1,549	121	134	\$206,836
Total red winegrapes	16,111			\$20,975,548		10,862	26,974	\$34,858,726
WHITE								
Chardonnay	2,027	\$200	\$4,040	\$1,575,736	\$778	1,673	3,700	\$2,876,612
Chenin Blanc	154	\$250	\$1,200	\$117,412	\$764	44	197	\$150,826
Marsanne	96			\$155,246	\$1,622	22	118	\$191,082
Other White	77			\$114,522	\$1,485	28	105	\$147,052
Pedro Ximenes	11			\$7,283	\$675	24	35	\$23,483
Pinot Gris	23			\$37,363	\$1,597	86	109	\$174,680
Riesling	260	\$350	\$1,400	\$224,444	\$865	157	417	\$360,384
Roussanne	25			\$36,174	\$1,432	18	43	\$61,808
Sauvignon Blanc	372	\$950	\$2,014	\$528,001	\$1,421	303	674	\$958,129
Semillon	356	\$250	\$2,014	\$327,574	\$921	142	497	\$457,863
Verdelho	62			\$67,884	\$1,095	122	184	\$201,036
Viognier	270	\$800	\$1,995	\$389,201	\$1,442	161	431	\$621,173
Total white winegrapes	3,731			\$3,580,839		2,779	6,510	\$6,224,128
Total all winegrapes	19,843			\$24,556,388		13,641	33,484	\$41,082,854

1 Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.

2 It is estimated that the non-response rate for McLaren Vale is 10%.



Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2008
	Pre-2006	2006	2007	2008		
Red winegrapes						
Barbera	11	0	1	1	12	4%
Cabernet Franc	26	0	0	0	26	0%
Cabernet Sauvignon	1284	6	0	4	1294	0%
Grenache	424	2	5	9	439	2%
Mataro (Mourvedre)	25	5	3	16	49	32%
Merlot	285	9	0	0	294	0%
Nebbiolo	9	0	0	0	9	0%
Other red	31	0	3	9	44	21%
Petit Verdot	65	1	0	0	67	0%
Pinot Noir	75	0	0	0	76	0%
Sangiovese	49	0	1	4	54	7%
Shiraz	3533	52	45	33	3663	1%
Tempranillo	26	0	1	3	30	11%
Total red varieties	5844	75	60	79	6058	1%
White winegrapes						
Albarino	0	1	3	3	7	47%
Chardonnay	679	3	4	1	688	0%
Chenin Blanc	17	0	0	4	21	18%
Marsanne	12	0	0	0	12	0%
Muscat Blanc (Frontignac)	7	0	1	1	9	9%
Other white	9	0	0	5	14	34%
Pinot Gris	13	8	4	6	30	18%
Riesling	71	0	0	0	71	0%
Roussanne	10	0	0	0	10	0%
Sauvignon Blanc	123	10	4	1	138	1%
Semillon	105	0	0	0	105	0%
Verdelho	21	4	0	0	25	0%
Viognier	69	6	3	1	79	1%
Total white varieties	1137	32	19	21	1209	2%
Rootstock block	1	0	0	0	1	0%
Unknown variety	122	0	0	0	122	0%
Total all varieties	7103	107	79	100	7390	1%

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Estimated supply and committed intake 2010 - 2014

Variety	Est Supply ¹	2010			Est Supply ¹	2012			Est Supply ¹	2014		
		Committed intake ²				Committed intake ²				Committed intake ²		
		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake
Red winegrapes												
Barbera	90	76	0	76	121	76	0	76	182	76	0	76
Cabernet Franc	185	100	22	122	213	106	22	128	272	78	22	100
Cabernet Sauvignon	8,869	4,420	3,873	8,293	8,268	4,501	2,288	6,789	8,304	4,328	1,372	5,700
Grenache	2,690	1,236	1,417	2,653	3,478	1,264	1,167	2,431	3,499	1,264	985	2,249
Mataro	291	183	156	338	298	224	156	380	312	224	153	377
Merlot	2,338	1,204	1,159	2,363	2,766	1,086	676	1,762	2,766	1,097	584	1,681
Nebbiolo	58	71	0	71	58	71	0	71	58	71	0	71
Other Red	257	184	11	196	272	190	8	198	303	194	8	202
Petit Verdot	641	306	173	479	641	306	51	357	641	306	38	344
Pinot Noir	890	118	429	547	898	121	277	398	909	121	78	199
Sangiovese	418	275	30	305	427	280	30	310	427	280	30	310
Shiraz	26,151	9,750	11,288	21,038	25,598	10,188	7,491	17,679	26,623	10,434	4,433	14,867
Tempranillo	175	173	17	189	181	173	11	184	195	176	0	176
Total red winegrapes	43,158	18,095	18,575	36,670	43,325	18,585	12,176	30,762	44,595	18,649	7,702	26,351
White winegrapes												
Chardonnay	5,218	2,287	2,080	4,366	6,499	2,174	986	3,160	6,670	2,205	369	2,574
Chenin Blanc	246	67	69	136	274	67	24	91	274	67	13	80
Colombard	200	0	0	0	201	0	0	0	201	0	0	0
Marsanne	95	44	111	156	99	44	111	156	106	44	111	156
Other White	153	70	52	122	240	81	52	133	392	81	38	119
Pinot Gris	579	122	22	145	649	128	11	139	790	128	11	139
Riesling	724	147	318	465	726	152	249	401	726	152	210	362
Roussanne	67	56	44	100	71	56	44	100	78	56	44	100
Sauvignon Blanc	1,336	461	461	923	1,812	467	285	751	2,192	484	235	718
Semillon	1,254	247	508	755	1,254	180	316	496	1,254	197	118	315
Verdelho	228	117	60	177	230	117	9	126	230	117	0	117
Viognier	551	209	243	452	560	215	250	465	582	215	199	414
Total white winegrapes	10,658	3,826	3,969	7,795	12,620	3,680	2,338	6,018	13,500	3,745	1,348	5,093
Total all winegrapes	53,816	21,921	22,545	44,465	55,945	22,266	14,514	36,780	58,095	22,394	9,050	31,445

¹ Supply forecast produced by ABARE based on the ABS Vineyard Survey 2008

² A raising factor of 1.11 has been applied to committed intake to allow for non-respondents