

# Clare Valley Wine Region

## Regional summary report

2008

### *Vintage report*

2008 was another year of challenges in the Clare Valley.

Whilst there was very little rainfall once again this growing season, the timing of rain was fortunate. We experienced a wet March and April in 2007 which saturated the soils and set up the vines for winter. Winter rainfall was way below average (approx half), with July being the only month with near average rains. The July rain set the vines up for a good budburst in mid August and another well timed rainfall in November, just before flowering, allowed for reasonable crops to be set. Another rainfall event at the end of December helped along the ripening period, with veraison beginning at the start of January. No significant rainfall was received again until late March, pushing the limits of most vineyards with water being a scarce commodity.

Strong vegetative growth was seen in Riesling throughout the season, ensuring the fruit was well protected as well as being able to ripen efficiently. Cabernet Sauvignon and Shiraz both had adequate canopies for ripening on the whole, with very few vineyards having significant leaf loss during the heat.

Cool ripening conditions prevailed throughout February, allowing for excellent flavour development and acid retention in all varieties. At the beginning of March an unprecedented heatwave hit Clare. Thankfully, the majority of Shiraz was picked before this. Cabernet Sauvignon however, bore the brunt of the heat with most of the fruit still on the vines when it started.

Overall the vintage was early and short, with the majority of fruit being picked by the middle of March.

*Ali Phillips*

*Leasingham Wines and PGIBSA Board member*

### *Overview of vintage statistics*

The harvest from the Clare Valley was 22,765 tonnes in 2008, up 30% compared with the 2007 harvest. The total value of grapes from the region increased by 50% from \$20 million to \$30 million, with the average purchase value for most of the major varieties increasing again, despite the extra tonnage (Riesling up by \$60 per tonne and Shiraz by nearly \$200 per tonne).

There were 86 hectares of new plantings in the Clare Valley in spring 2007 (including top-working and replacements) - compared with 44 hectares in 2006. Red varieties (Shiraz and Cabernet Sauvignon) accounted for around two thirds of the total.

The estimated production from the Clare Valley for 2009 is 27,000 tonnes (based on an improvement in the availability of water). The wineries' committed intake is 34,000 tonnes – ie higher than the estimated supply, so there is not expected to be any surplus fruit. Early indications from the 2008-09 growing season are that this level of production is unlikely to be achieved; therefore there may be significant shortfalls in supply.

By 2013, the estimated production is 28,000 tonnes, of which 90% (25,000 tonnes) is already under contract or winery grown fruit. This leaves a very small expected amount of surplus fruit. Across the state, even if growing conditions return to "normal", there is expected to be little or no overall surplus compared with demand in 2013 (see State Summary section).

# Clare Valley

# Winegrape intake summary - vintage 2008

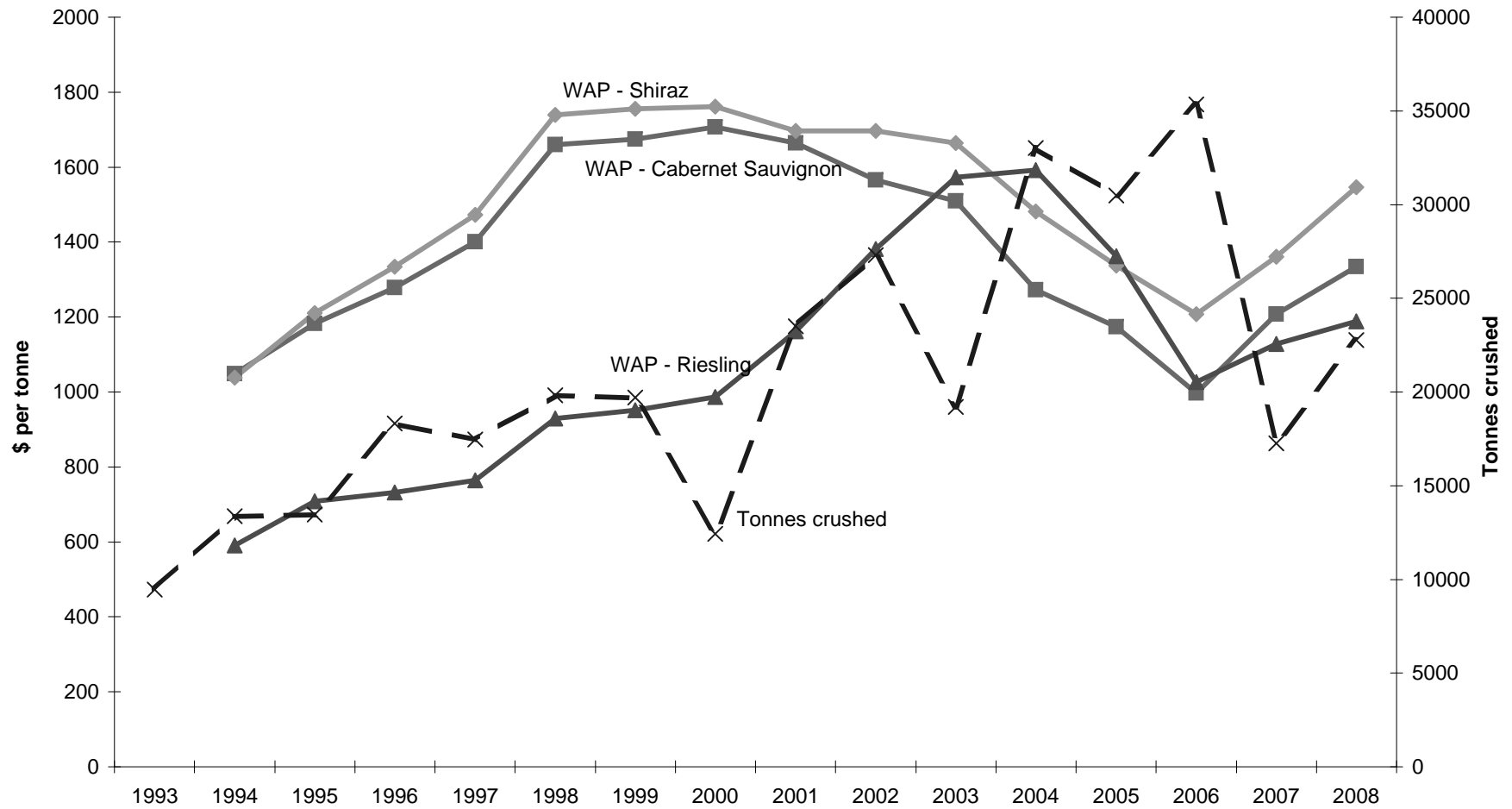
Variety	Tonnes purchased	Lowest price <sup>1</sup>	Highest price <sup>1</sup>	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
<b>Red winegrapes</b>								
Cabernet Franc	11			\$7,775	\$707	41	52	\$37,000
Cabernet Sauvignon	1,699	\$800	\$2,750	\$2,268,232	\$1,335	2,018	3,717	\$4,961,514
Grenache	104	\$1,000	\$1,800	\$146,282	\$1,409	86	190	\$268,085
Malbec	19	\$600	\$1,500	\$15,816	\$839	215	234	\$196,482
Mataro	24	\$1,000	\$1,400	\$26,580	\$1,109	33	57	\$63,654
Merlot	567	\$250	\$1,500	\$623,984	\$1,100	506	1,074	\$1,180,619
Petit Verdot	46	\$731	\$900	\$35,919	\$781	25	71	\$55,099
Pinot Noir	4			\$3,200	\$800	59	63	\$50,400
Sangiovese	33			\$35,172	\$1,056	58	91	\$95,897
Shiraz	4,039	\$850	\$3,000	\$6,246,105	\$1,546	2,922	6,962	\$10,764,765
Tempranillo	72	\$650	\$1,800	\$113,233	\$1,565	25	97	\$152,271
Other red	7			11,660	\$1,700	80	87	\$120,076
<b>Total red winegrapes</b>	<b>6,626</b>			<b>\$9,533,958</b>		<b>6,069</b>	<b>12,696</b>	<b>\$17,945,862</b>
<b>White winegrapes</b>								
Chardonnay	616	\$600	\$1,701	\$641,217	\$1,041	793	1,409	\$1,465,901
Pinot Gris	45			\$67,080	\$1,500	25	69	\$103,830
Riesling	4,776	\$250	\$2,000	\$5,672,029	\$1,188	2,541	7,317	\$8,690,400
Sauvignon Blanc	44	\$1,150	\$1,400	\$56,306	\$1,269	121	165	\$210,027
Semillon	407	\$600	\$1,300	\$429,568	\$1,057	436	843	\$890,706
Traminer	37			\$44,100	\$1,199	54	90	\$108,400
Viognier	54	\$1,400	\$1,600	\$82,622	\$1,526	58	112	\$171,255
Other white	0					63	63	73,240
<b>Total white winegrapes</b>	<b>5,979</b>			<b>\$6,992,922</b>		<b>4,090</b>	<b>10,069</b>	<b>\$11,713,760</b>
<b>Total all winegrapes<sup>2</sup></b>	<b>12,605</b>			<b>\$16,526,881</b>		<b>10,160</b>	<b>22,765</b>	<b>\$29,659,622</b>

<sup>1</sup> 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.

<sup>2</sup> The estimated non-response rate for the Clare Valley is 14%.

# Clare Valley

## Historical Weighted Average Price vs tonnes crushed



## Clare Valley

## Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2007
	Pre-2005	2005	2006	2007		
<b>Red winegrapes</b>						
Cabernet Franc	20	0	0	0	20	0%
Cabernet Sauvignon	1158	12	9	22	1201	2%
Grenache	65	0	0	0	65	0%
Malbec	70	0	0	2	71	2%
Mataro (Mourvedre)	31	0	0	1	32	2%
Merlot	296	4	7	0	307	0%
Other red	22	0	0	0	22	1%
Petit Verdot	21	0	0	0	21	0%
Pinot Noir	11	0	0	0	11	0%
Sangiovese	34	0	0	0	34	0%
Shiraz	1827	15	8	30	1880	2%
Tempranillo	19	0	0	3	22	15%
<b>Total red winegrapes</b>	<b>3573</b>	<b>31</b>	<b>25</b>	<b>58</b>	<b>3686</b>	<b>2%</b>
<b>White winegrapes</b>						
Chardonnay	340	12	0	0	352	0%
Other white	16	0	1	2	18	9%
Pinot Gris	16	5	5	3	30	11%
Riesling	1195	6	24	15	1240	1%
Sauvignon Blanc	34	1	2	6	43	14%
Semillon	185	0	0	0	185	0%
Traminer	24	0	8	0	32	0%
Viognier	22	2	0	3	27	11%
<b>Total white winegrapes</b>	<b>1833</b>	<b>26</b>	<b>40</b>	<b>28</b>	<b>1927</b>	<b>1%</b>
Rootstock Block	0	0	0	0	0	0%
Unknown	15	0	0	0	15	0%
<b>Total all varieties</b>	<b>5422</b>	<b>57</b>	<b>64</b>	<b>86</b>	<b>5629</b>	<b>2%</b>

# Clare Valley

# Estimated supply and committed intake 2009 - 2013

Variety	2009				2011				2013			
	Est Supply <sup>1</sup>	Total committed intake <sup>2</sup>		Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Total committed intake <sup>2</sup>		Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Total committed intake <sup>2</sup>		Available supply <sup>3</sup>
		Winery grapes	Contract purchases			Winery grapes	Contract purchases			Winery grapes	Contract purchases	
<b>Red winegrapes</b>												
Barbera	33	28	0	5	22	16	0	6	22	16	0	6
Cabernet Franc	48	89	0	0	81	79	0	2	81	79	0	2
Cabernet Sauvignon	4,443	3,578	3,077	0	4,506	3,564	2,233	0	4,561	4,033	1,028	0
Grenache	192	104	129	0	185	69	81	35	185	69	43	73
Malbec	303	318	15	0	343	308	16	19	380	310	16	54
Mataro	40	44	20	0	33	44	20	0	33	44	20	0
Merlot	1,639	994	984	0	1,764	1,023	941	0	1,859	1,023	412	424
Other red	92	71	9	17	257	44	9	209	270	44	9	221
Petit Verdot	86	43	23	20	69	43	6	21	69	43	6	21
Pinot Noir	87	85	0	2	81	85	0	0	81	85	0	0
Sangiovese	179	104	15	60	141	107	12	23	141	111	12	19
Shiraz	8,482	4,195	6,025	0	8,584	4,302	5,100	0	8,709	4,587	2,565	1,556
Tempranillo	58	35	58	0	45	54	58	0	45	102	81	0
<b>Total red winegrapes</b>	<b>15,682</b>	<b>9,687</b>	<b>10,353</b>	<b>0</b>	<b>16,112</b>	<b>9,737</b>	<b>8,476</b>	<b>0</b>	<b>16,437</b>	<b>10,546</b>	<b>4,191</b>	<b>1,700</b>
<b>White winegrapes</b>												
Chardonnay	2,171	1,579	938	0	2,237	1,570	566	101	2,237	1,574	207	456
Chenin Blanc	10	10	0	0	10	0	0	10	10	0	0	10
Muscadelle	8	20	0	0	14	2	0	12	14	2	0	12
Muscat a Petit Grains Blanc	17	12	0	5	11	0	0	11	11	0	0	11
Other White	17	3	0	14	31	3	14	14	31	3	23	5
Pedro Ximenes	17	35	0	0	17	0	0	17	17	0	0	17
Pinot Gris	52	61	89	0	90	103	127	0	150	152	139	0
Riesling	7,158	3,412	6,029	0	7,324	3,436	4,734	0	7,543	3,467	2,996	1,080
Sauvignon Blanc	218	220	29	0	245	222	41	0	245	267	46	0
Semillon	1,244	753	803	0	1,244	735	677	0	1,244	747	125	372
Traminer	133	166	17	0	193	167	17	9	299	172	17	109
Verdelho	10	23	0	0	18	0	0	18	18	0	0	18
Viognier	96	72	125	0	97	72	156	0	97	72	156	0
<b>Total white winegrapes</b>	<b>11,152</b>	<b>6,365</b>	<b>8,029</b>	<b>0</b>	<b>11,532</b>	<b>6,310</b>	<b>6,332</b>	<b>0</b>	<b>11,917</b>	<b>6,456</b>	<b>3,710</b>	<b>1,750</b>
<b>Total all winegrapes</b>	<b>26,834</b>	<b>16,052</b>	<b>18,382</b>	<b>0</b>	<b>27,644</b>	<b>16,047</b>	<b>14,808</b>	<b>0</b>	<b>28,354</b>	<b>17,002</b>	<b>7,902</b>	<b>3,450</b>

<sup>1</sup> Supply forecast produced by ABARE based on the ABS Vineyard Survey 2007

<sup>2</sup> A raising factor of 1.16 has been applied to committed intake to allow for non-respondents

<sup>3</sup> Where total committed intake is greater than estimated supply, the available supply is recorded as zero.