

Clare Valley Wine Region

Regional summary report

2007

Clare Valley

Vintage overview

Vintage report

The 2007 vintage was a memorable one for the Clare Valley. Seasonal influences played a dramatic part in the 2006-2007 grape-growing season, which was one of the warmest and driest on record, with parts of the region also being affected by frost.

Despite the fact that 2007 was a warm year, the growing season was consistently warm rather than hot. There were very few 40 degree plus days this season, which allowed for the development of full, fresh flavours while also maintaining the natural acid structures.

The growing season was very dry, with Clare receiving roughly half of its average rainfall. There was a significant rainfall event in mid-January, with parts of Clare receiving over 100mm. For many vineyards this significant rainfall gave all vines a 'much needed drink' and was important to maintaining canopies to allow for full flavour and structural development in the grapes. While some sites experienced splitting, there were no reports of botrytis from these vineyards.

Wide variations in yield were experienced for the 2007 vintage. The combined effects of drought, frost and cool windy conditions during flowering heavily influenced yields across the region. The number of berries per bunch, berry weights and bunch numbers per vine were all down and in a number of cases resulted in extraordinarily low yields. Riesling appeared to be the variety that showed the least yield variation, with most growers recording yields 20% below average. Cabernet Sauvignon and Shiraz showed significantly greater variation, with crops between 50% and 70% down. Despite the early start, logistics in the winery were relatively easy due to the low yields. The challenge however was in reliable yield prediction.

Clare Valley Winemakers' Inc.

Overview of vintage statistics

The harvest from the Clare Valley was 17,258 tonnes in 2006, less than 50% of the 2006 harvest. The total value of grapes from the region dropped by 46% to \$20 million, with the average purchase value for most of the major varieties increasing, due to shortfalls in supply (Cabernet Sauvignon by more than \$200 per tonne).

There were 44 hectares of new plantings in the Clare Valley in spring 2006 (including top-working and replacements) - compared with 20 hectares in 2005. Riesling accounted for half of the total. There is no indication of any significant removal of grapevines being undertaken in the region.

The estimated production from the Clare Valley for 2008 is 21,000 tonnes (taking into account the ongoing effects of drought and water restrictions, and recovery from frost). The wineries' committed intake is 35,000 tonnes - ie higher than the estimated supply, so there is not expected to be any surplus fruit. By 2012, the estimated production is 43,000 tonnes, of which 75% (32,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 11,000 tonnes to be sold on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Clare Valley

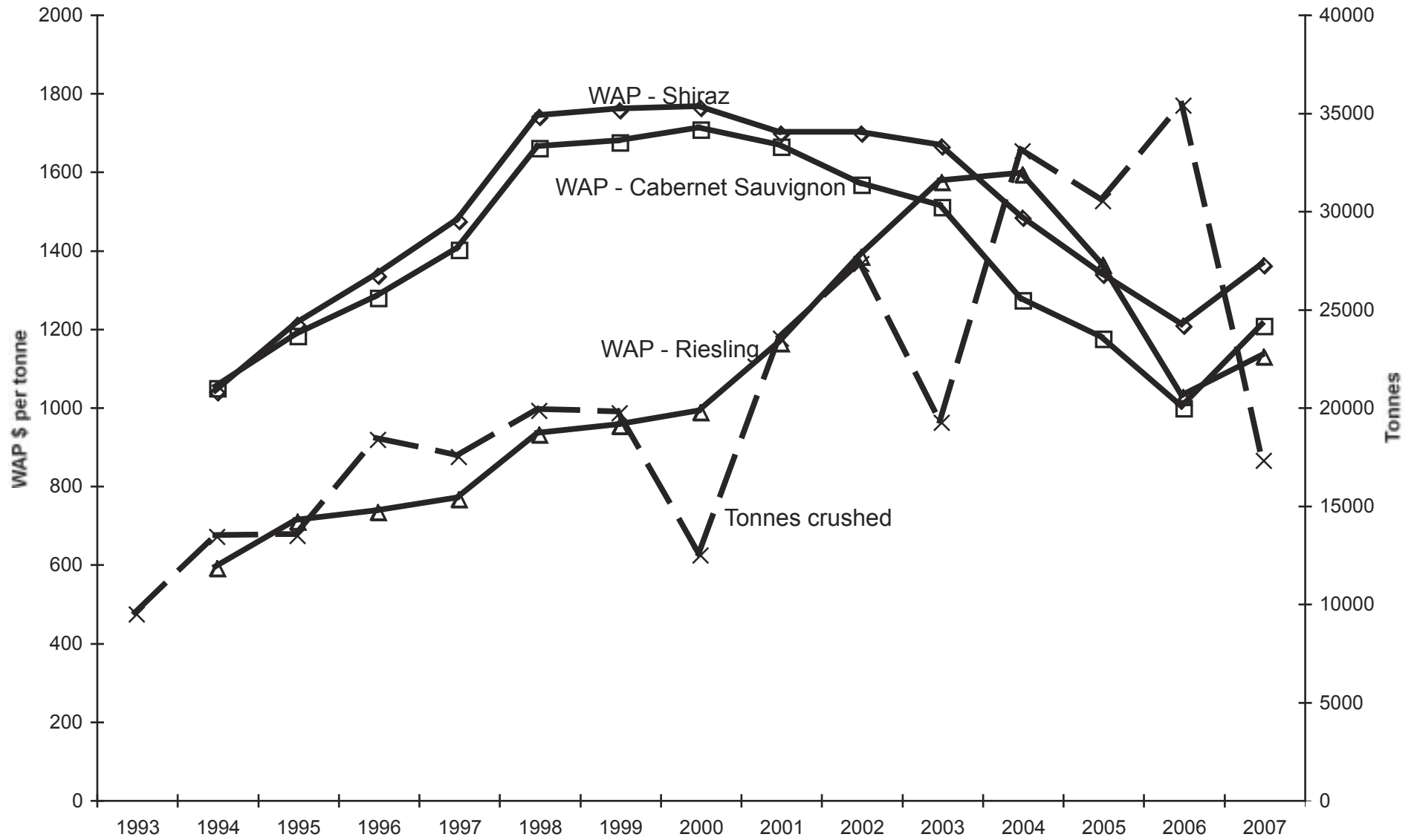
Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price ¹	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	5			\$3,304	\$703	27	31	\$21,975
Cabernet Sauvignon	1,208	\$500	\$2,725	\$1,457,584	\$1,207	1,420	2,628	\$3,171,484
Grenache	72	\$1,000	\$1,600	\$80,975	\$1,118	52	124	\$138,771
Malbec	44	\$750	\$2,000	\$46,089	\$1,040	87	131	\$136,601
Mataro	9			\$8,955	\$984	22	31	\$30,132
Merlot	779	\$400	\$1,630	\$838,227	\$1,076	460	1,239	\$1,333,591
Other Red	7			\$7,284	\$1,071	54	61	\$65,181
Petit Verdot	38			\$27,968	\$731	33	71	\$52,186
Pinot Noir	12			\$8,316	\$700	44	56	\$39,046
Ruby Cabernet	0					8	8	\$10,130
Sangiovese	57			\$54,622	\$959	107	164	\$156,826
Shiraz	3,007	\$500	\$3,000	\$4,092,787	\$1,361	1,535	4,542	\$6,182,930
Tempranillo	21			\$32,964	\$1,557	17	38	\$58,874
Total red winegrapes	5,259			\$6,659,075		3,865	9,124	\$11,397,728
WHITE								
Chardonnay	590	\$500	\$1,652	\$574,855	\$974	504	1,094	\$1,065,769
Chenin Blanc	0					7	7	\$7,771
Other White	0					35	35	\$38,853
Pinot Gris	19			\$26,012	\$1,398	6	25	\$34,403
Riesling	3,705	\$600	\$2,700	\$4,179,022	\$1,128	2,047	5,752	\$6,488,634
Sauvignon Blanc	43	\$850	\$1,500	\$54,043	\$1,266	109	152	\$192,265
Semillon	580	\$400	\$1,500	\$623,436	\$1,074	323	903	\$970,133
Traminer	24			\$24,480	\$1,000	71	95	\$95,030
Verdelho	0			\$0	\$0	7	7	\$7,771
Viognier	50	\$1,500	\$1,800	\$80,857	\$1,616	14	64	\$102,675
Total white winegrapes	5,011			\$5,562,704		3,122	8,133	\$9,003,304
Total all winegrapes	10,270			\$12,221,779		6,988	17,258	\$20,401,033

¹ Lowest and highest prices paid are only reported where there are at least three purchasers

Clare Valley

Historical WAP vs tonnes crushed



Clare Valley

Current plantings and projected production 2008 - 2012

Variety	Current area in hectares by year planted						Estimated production 2008 - 2012				
	Pre-2004	2004	2005	2006	Total	% planted in 2006	2008	2009	2010	2011	2012
Red winegrapes											
Cabernet Franc	20	0	0	0	20	0%	70	100	140	140	140
Cabernet Sauvignon	1268	5	0	13	1286	1%	3815	6399	7709	7709	7709
Grenache	65	0	0	0	65	0%	228	326	456	456	456
Malbec	74	1	0	0	75	0%	262	376	527	527	527
Mataro (Mourvedre)	31	0	0	0	31	0%	108	155	218	218	218
Merlot	307	0	0	2	309	1%	1075	1540	2166	2166	2166
Other red	18	0	0	0	19	1%	66	95	133	133	133
Petit Verdot	21	0	0	0	21	0%	74	106	148	148	148
Pinot Noir	12	0	0	0	12	0%	42	60	84	84	84
Sangiovese	34	0	0	0	34	0%	121	172	241	241	241
Shiraz	1868	40	7	4	1919	0%	6649	9574	13437	13437	13437
Tempranillo	14	4	0	0	19	0%	61	94	132	132	132
Total red winegrapes	3734	51	7	19	3811	0%	18998	25393	25393	25393	25393
White winegrapes					0						
Chardonnay	361	17	2	0	380	0%	1684	2658	3423	3423	3423
Other white	19	0	0	1	20	4%	86	136	180	180	180
Pinot Gris	7	10	2	2	21	12%	65	132	189	189	189
Riesling	1151	61	6	21	1239	2%	5385	8588	11141	11141	11141
Sauvignon Blanc	30	1	1	1	32	2%	139	221	291	291	291
Semillon	188	0	0	0	188	0%	847	1318	1695	1695	1695
Traminer	22	0	0	0	22	0%	101	157	202	202	202
Viognier	16	6	2	0	24	0%	86	167	196	196	196
Total white winegrapes	1794	96	13	25	1927	1%	13378	17317	17317	17317	17317
Total all varieties	5528	147	20	44	5739	1%	20964	32376	42709	42709	42709

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Estimated supply and committed intake 2008 - 2012

Variety	2008				2010				2012			
	Est Supply ¹	Winery grown grapes ²	Contract purchases ²	Un-contracted fruit ³	Est Supply ¹	Winery grown grapes ²	Contract purchases ²	Un-contracted fruit ³	Est Supply ¹	Winery grown grapes ²	Contract purchases ²	Un-contracted fruit ³
Red winegrapes												
Cabernet Franc	70	94	8	-32	140	94	8	38	140	96	8	37
Cabernet Sauvignon	3,815	3,782	3,184	-3,150	7,709	3,672	2,199	1,838	7,709	3,911	1,194	2,605
Grenache	228	105	144	-21	456	109	100	248	456	109	100	248
Malbec	262	310	74	-122	527	318	52	157	527	318	53	156
Mataro	108	49	22	38	218	52	22	144	218	52	22	144
Merlot	1,075	1,016	1,447	-1,388	2,166	1,073	984	108	2,166	1,095	837	234
Other Red	66	85	5	-24	133	87	5	41	133	87	5	41
Petit Verdot	74	62	109	-96	148	62	0	86	148	62	0	86
Pinot Noir	42	76	0	-34	84	76	0	9	84	76	0	9
Ruby Cabernet	0	13	0	-13	0	13	0	-13	0	13	0	-13
Sangiovese	121	113	11	-3	241	118	16	107	241	124	16	101
Shiraz	6,649	4,120	7,525	-4,996	13,437	4,247	5,687	3,503	13,437	4,584	3,339	5,514
Tempranillo	61	31	33	-3	132	31	65	36	132	31	65	36
Total red winegrapes	12,571	9,856	12,560	-9,845	25,393	9,953	9,139	6,301	25,393	10,556	5,639	9,198
White winegrapes												
Chardonnay	1,684	1,560	637	-513	3,423	1,709	466	1,249	3,423	1,714	262	1,448
Chenin Blanc	0	13	0	-13	0	13	0	-13	0	13	0	-13
Other White	86	77	0	9	180	77	4	98	180	77	22	81
Pinot Gris	65	22	38	5	189	71	123	-4	189	98	143	-52
Riesling	5,385	3,265	5,321	-3,200	11,141	3,423	5,086	2,632	11,141	3,499	3,935	3,707
Sauvignon Blanc	139	175	43	-79	291	204	46	41	291	220	56	14
Semillon	847	776	520	-449	1,695	776	402	517	1,695	787	354	554
Traminer	101	176	51	-126	202	176	119	-93	202	208	119	-126
Verdelho	0	16	0	-16	0	16	0	-16	0	16	0	-16
Viognier	86	39	27	20	196	66	152	-23	196	66	174	-44
Total white winegrapes	8,393	6,119	6,637	-4,363	17,317	6,530	6,398	4,388	17,317	6,698	5,065	5,553
Total all winegrapes	20,964	15,975	19,197	-14,208	42,709	16,483	15,537	10,690	42,709	17,254	10,704	14,751

¹ Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)

² A raising factor of 1.085 has been applied to these figures to allow for non-respondents

³ A negative number indicates supply forecast is below wineries' estimated commitment