

Clare Valley Wine Region

Regional summary report

2009

Vintage report

The growing season for 2009 began with soil moisture levels at or near full capacity due to the very welcome rains in August 2008. All varieties pushed away with good growth and we had clear skies during spring. In early December, there was concern about dry conditions until the 11th when we received another perfectly timed drink of 100mm over two days. This rainfall was beneficial in more ways than we realised at the time.

The vines had finished flowering when the rain came and the immature clusters indicated cropping levels at average quantities. Average levels in the Clare Valley are around 5-6 t/Ha for Shiraz and Cabernet Sauvignon and ~8T/Ha for Riesling.

Mild weather continued during December and January, gradually warming to the point where we experienced '*that* heat-wave'. This is when the December rain showed its full effect. The rain prolonged the growing season and the vines had not begun veraison, so in the heat, they simply shut down and went to sleep for about 10 days. Strong canopies protected the fruit and mature leaves withstood the high temperatures.

Fortunately, when the heat subsided the Clare Valley entered a period of perfect ripening weather with mild days and classically cool nights. Veraison proceeded evenly and the accumulation of sugars in the berries increased at a modest rate, due to the mild February which was 3 degrees below average for the region. Interestingly, even taking into account the hot spell, the growing season was the coolest since the 2005 harvest with a figure of 1861 growing degree days (a summation of daily temperature).

The early white varieties Chardonnay and Semillon were generally picked in the last days of February, and the wineries barely broke a sweat before easing to a leisurely pace which became the rhythm until the last berry was picked in May.

This season the wines are demonstrating vibrant fruit flavours across the Valley. Riesling fared exceptionally well, but the outstanding variety from 2009 will perhaps be Cabernet Sauvignon. The increasingly mild conditions saw this variety in its preferred element, with ample time to develop flavour. The Cabernet harvest was just before Anzac Day, which is in line with the better years for this variety.

Neville Rowe

Chairman - Clare Valley Winemakers' Incorporated

Overview of vintage statistics

The harvest from the Clare Valley was 25,216 tonnes in 2009, up 10% compared with last year - against the trend in most regions of a lower crush than in 2008. The total value of grapes from the region decreased, however, by around \$1 million, with the average purchase value for the top three varieties decreasing to slightly below 2007 values.

There were 83 hectares of new plantings in the Clare Valley in spring 2008 (including top-working and replacements) - almost exactly the same as last year. Cabernet Sauvignon accounted for almost half of the total.

The estimated production from the Clare Valley for 2010 is 25,000 tonnes. The wineries' committed intake is 30,000 tonnes – ie higher than the estimated supply, so there is not expected to be any surplus fruit.

By 2014, the estimated production is just under 30,000 tonnes, of which 70% (21,000 tonnes) is already under contract or winery grown fruit. This leaves around 9,000 tonnes as yet uncontracted. 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).

Clare Valley

Winegrape intake summary - vintage 2009

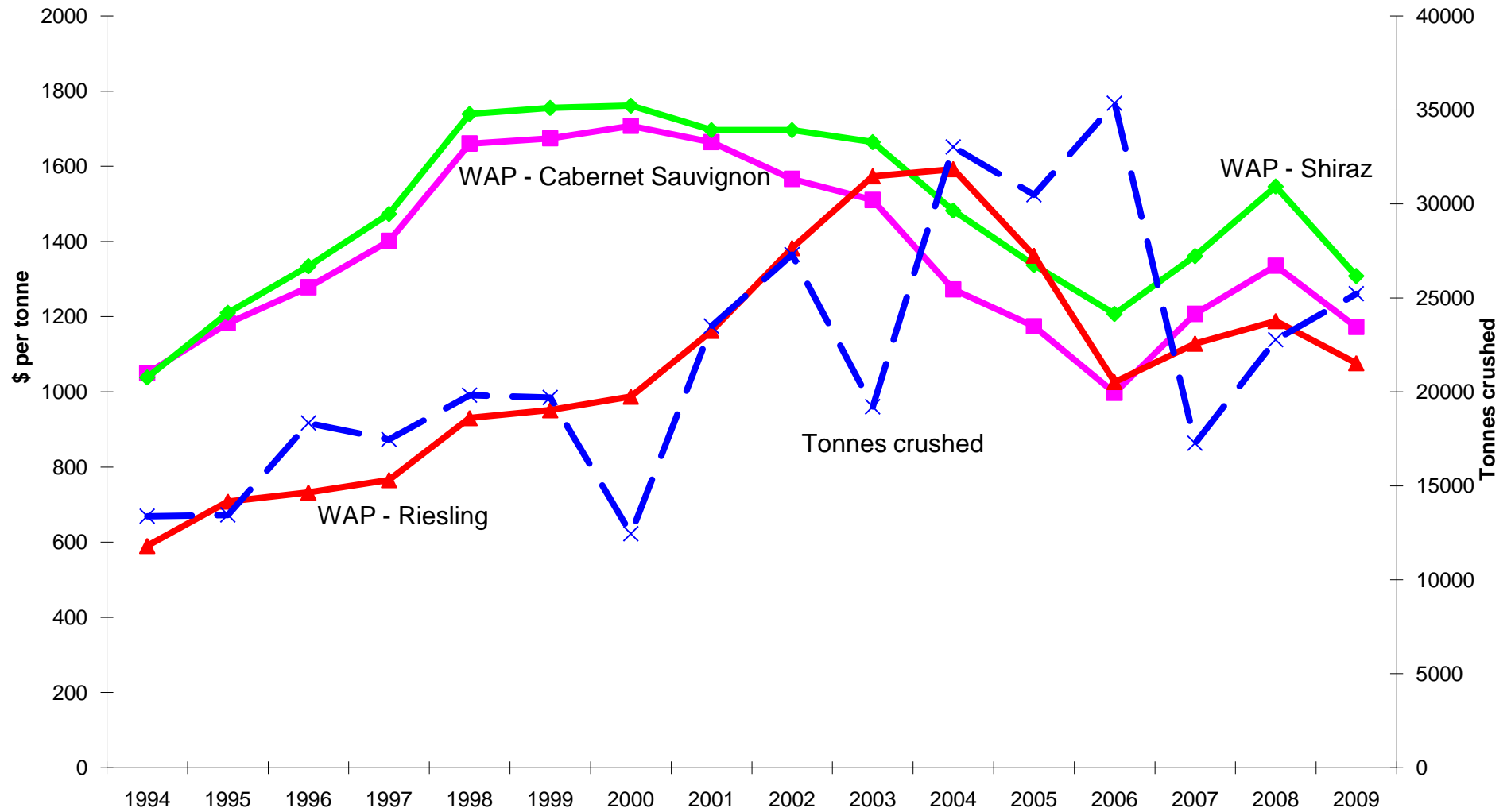
Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
RED								
Barbera	0					22	22	\$26,435
Cabernet Franc	0					61	61	\$74,597
Cabernet Sauvignon	2,436	\$600	\$2,075	\$2,855,874	\$1,172	2,377	4,814	\$5,642,159
Grenache	97	\$600	\$1,800	\$116,820	\$1,210	123	219	\$265,509
Malbec	12			\$12,344	\$993	204	216	\$214,625
Mataro	19			\$22,552	\$1,160	28	47	\$54,489
Merlot	807	\$350	\$1,500	\$763,011	\$945	833	1,640	\$1,550,676
Nebbiolo	0					12	12	\$14,971
Other Red	16	\$800	\$1,800	\$26,176	\$1,619	30	46	\$63,745
Petit Verdot	26			\$17,600	\$667	33	60	\$39,807
Pinot Noir	4			\$3,600	\$900	70	74	\$66,420
Sangiovese	0					79	79	\$96,520
Shiraz	4,549	\$350	\$3,000	\$5,950,589	\$1,308	2,963	7,512	\$9,826,302
Tempranillo	101	\$1,100	\$1,500	\$124,944	\$1,243	35	135	\$168,315
Total red winegrapes	8,069			\$9,893,510		6,869	14,937	\$18,104,569
WHITE								
Chardonnay	512	\$300	\$1,764	\$455,767	\$891	891	1,403	\$1,249,709
Other White	0					28	28	\$29,379
Pedro Ximenes	0					22	22	\$23,250
Pinot Gris	80	\$950	\$1,200	\$92,490	\$1,157	57	136	\$157,885
Riesling	4,802	\$400	\$2,000	\$5,166,944	\$1,076	2,454	7,256	\$7,807,290
Sauvignon Blanc	56	\$900	\$1,500	\$57,472	\$1,020	132	188	\$192,104
Semillon	682	\$400	\$1,350	\$702,697	\$1,030	331	1,014	\$1,043,911
Traminer	22			\$25,080	\$1,163	74	95	\$110,901
Verdelho	0					20	20	\$21,136
Viognier	44	\$1,000	\$1,600	\$50,072	\$1,137	72	116	\$131,402
Total white winegrapes	6,198			\$6,550,521		4,080	10,278	\$10,766,966
Total all winegrapes	14,267			\$16,444,031		10,949	25,216	\$28,871,535

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 the Clare Valley is 10%.

Clare Valley

Historical Weighted Average Price vs tonnes crushed



Clare Valley

Current plantings by variety and year planted

	Current area in hectares					% planted in 2008
Variety	Pre-2006	2006	2007	2008	Total area	
Red winegrapes						
Cabernet Franc	17	0	0	0	17	0%
Cabernet Sauvignon	1164	9	22	39	1234	3%
Grenache	67	0	0	0	67	0%
Malbec	67	0	2	0	70	0%
Mataro (Mourvedre)	31	0	1	0	32	0%
Merlot	298	7	0	1	306	0%
Other red	19	0	0	1	20	3%
Petit Verdot	21	0	0	0	21	0%
Pinot Noir	11	0	0	0	11	0%
Sangiovese	34	0	0	0	34	0%
Shiraz	1856	15	30	12	1914	1%
Tempranillo	19	0	5	3	27	11%
Total red varieties	3605	32	60	56	3753	2%
White winegrapes						
Chardonnay	313	0	0	0	313	0%
Other white	16	1	4	3	23	11%
Pinot Gris	22	5	3	9	39	22%
Riesling	1212	24	18	13	1268	1%
Sauvignon Blanc	31	2	6	0	39	0%
Semillon	184	0	0	0	184	0%
Traminer	24	8	0	1	33	4%
Viognier	22	0	3	0	25	0%
Total white varieties	1824	40	33	26	1923	1%
Unknown variety	9	0	0	0	9	0%
Total all varieties	5440	71	93	83	5687	1%

Clare Valley

Estimated supply and committed intake 2010 - 2014

Variety	2010				2012				2014			
	Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²			Est Supply ¹	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	40	29	0	29	40	29	0	29	40	29	0	29
Cabernet Franc	115	107	0	107	116	107	0	107	116	107	0	107
Cabernet Sauvignon	4,529	3,360	2,605	5,965	4,960	3,658	713	4,371	5,147	4,062	425	4,488
Grenache	384	130	93	223	388	130	78	207	395	130	57	187
Malbec	317	206	11	217	325	202	11	213	343	202	11	213
Mataro	93	46	13	59	97	46	0	46	105	46	0	46
Merlot	1,255	1,154	988	2,141	1,840	1,176	473	1,649	1,840	1,187	391	1,578
Nebbiolo	22	23	0	23	22	23	0	23	22	23	0	23
Other Red	68	53	1	54	73	58	1	59	83	75	1	76
Petit Verdot	117	54	24	78	117	54	0	54	117	54	0	54
Pinot Noir	84	92	4	97	84	92	4	97	84	92	4	97
Sangiovese	190	126	0	126	192	142	0	142	192	147	0	147
Shiraz	8,159	3,638	4,582	8,220	9,931	3,847	2,595	6,442	10,117	4,026	1,681	5,707
Tempranillo	49	43	73	116	70	57	73	129	111	76	94	171
Total red winegrapes	15,425	9,060	8,393	17,454	18,255	9,619	3,948	13,567	18,712	10,255	2,665	12,920
White winegrapes												
Chardonnay	1,749	1,535	767	2,302	2,023	1,524	299	1,823	2,023	1,511	112	1,623
Other White	233	69	4	73	279	69	22	91	371	69	22	91
Pinot Gris	96	78	114	192	118	116	130	246	128	127	99	226
Riesling	5,731	3,195	5,088	8,283	6,316	3,274	2,933	6,207	6,513	3,301	1,663	4,965
Sauvignon Blanc	290	207	2	209	302	210	0	210	323	210	0	210
Semillon	1,172	692	670	1,362	1,297	692	157	849	1,297	698	44	742
Traminer	221	158	13	171	220	166	13	179	220	180	13	193
Verdelho	18	20	0	20	18	20	0	20	18	20	0	20
Viognier	127	74	9	82	137	74	141	214	156	74	141	214
Total white winegrapes	9,668	6,027	6,668	12,694	10,759	6,145	3,695	9,839	11,135	6,190	2,094	8,284
Total all winegrapes	25,093	15,087	15,061	30,148	29,014	15,764	7,642	23,407	29,847	16,445	4,759	21,204

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

² A raising factor of 1.1 has been applied to committed intake to allow for non-respondents