

# Clare Valley

## CLARE VALLEY VINTAGE OVERVIEW

### *Vintage Report*

Weather conditions were the key to the 2002 vintage. Very good winter rains were followed by a cool spring with good rainfall, a very cool summer, and a dry, warm autumn that enabled fruit to ripen and show impressive flavour profiles. There were problems with fruit set in some varieties due to cool, wet and windy conditions at flowering with Malbec and Merlot being most affected. Riesling yields were also down 20% to 30% on average.

Despite the cool summer, the total heat degree days for vintage 2002 turned out to be very high. The autumn of 2002 was warmer and drier than usual – in fact the total heat degree days for March and April 2002 were the highest in the period 1986–2002. This was very important to the outcome of the vintage.

As a result of the late start, vintage was compressed somewhat and for many it was very hectic through the middle part. Even so, vintage was reported as proceeding smoothly with good communication between wineries, grapegrowers and contractors. Fruit was picked in extremely good condition with higher than average baumé levels, high natural acid and wonderful flavours. The red varieties have very good colour and this showed in vineyards quite soon after veraison. Phenological ripeness in white varieties was much more in line with sugar ripeness than in reds where late development of flavours was a feature. This led to some high baumé fruit and higher than usual alcohol levels in some red wines.

The wines from 2002 are still to evolve but the early signs are very encouraging indeed with many winemakers of the opinion that some will be the best wines to ever come out of the Clare Valley.

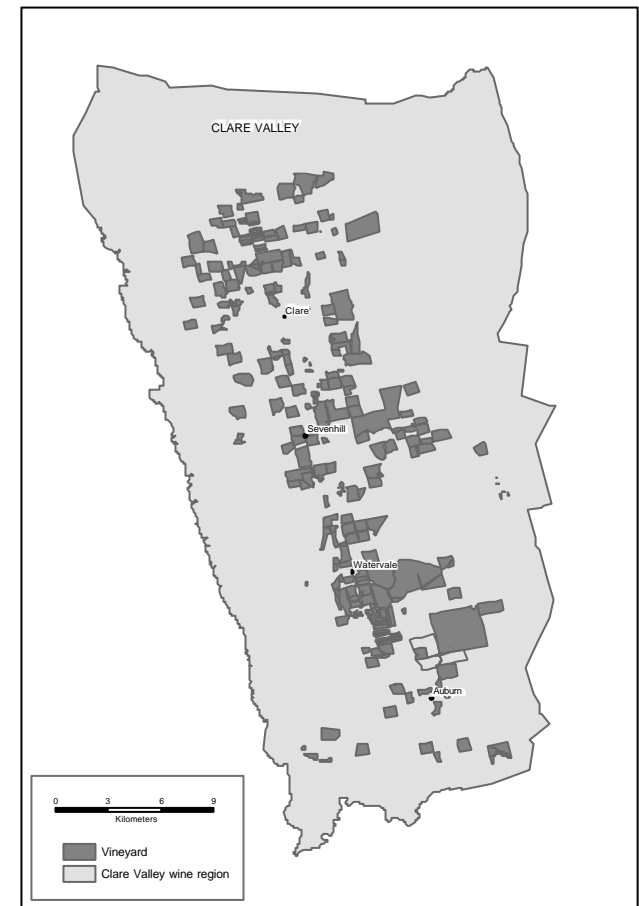
*Edited from report supplied by:  
Peter Barry  
Chairman, Clare Valley Winemakers Inc*

### *Overview of vintage statistics*

The Clare Valley crushed a total of 27,293 tonnes in 2002 – a 16% increase on the 2001 vintage. There was a 3000 tonne shortfall between supply and demand – nearly 2/3 of which was in Riesling. The shortage of Riesling was reflected in the price, with the weighted average weighbridge price (WAWP) for Riesling being up by more than \$200 per tonne compared with last year. WAWP for other varieties were very similar to last year, except for Cabernet Sauvignon which, as in many regions, was down by around \$100 per tonne.

The forecast for the region is for a significant increase in production of Cabernet Sauvignon and Shiraz in 2003, followed by very little further growth over the next five years in red varieties. There is expected to be a slight surplus of reds throughout the forecast period. In the whites, while Chardonnay and Semillon are expected to decline slightly, Riesling is expected to increase by around 2000 tonnes from 2003 to 2007 (40%), with a shortfall of 1,400 tonnes by the year 2007.

Despite the forecast showing that supply and demand for all major varieties except Riesling are already in balance, the majority of new plantings in Clare have been in red varieties once again.



## CLARE VALLEY TONNES CRUSHED BY VARIETY - VINTAGE 2002

Table 5.1

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	Purchased	Preferred
<b>RED</b>									
Cabernet Franc	96	101	196	165	51%	119%	7	8	10
Cabernet Sauvignon	3954	2992	6946	7503	43%	93%	22	20	30
Grenache	58	345	404	365	86%	111%	3	12	14
Malbec	148	55	203	248	27%	82%	10	8	14
Mataro	15	8	23	23	36%	103%	2	2	3
Merlot	798	651	1449	1626	45%	89%	14	13	19
Nebbiolo	4	5	9	2	56%	445%	2	1	1
Other red	21	0	21	26	0%	84%	2	0	2
Petit Verdot	56	75	130	93	57%	140%	4	1	4
Pinot Noir	214	79	293	293	27%	100%	3	5	6
Ruby Cabernet	15	0	15	18	0%	83%	1	0	1
Sangiovese	39	23	62	74	38%	84%	4	4	4
Shiraz	3499	4902	8401	8849	58%	95%	20	21	29
Tempranillo	4	0	4	8	0%	52%	3	0	3
<b>Total RED</b>	<b>8920</b>	<b>9237</b>	<b>18157</b>	<b>19293</b>	<b>51%</b>	<b>94%</b>			
<b>WHITE</b>									
Chardonnay	1933	985	2918	3376	34%	86%	15	17	20
Chenin Blanc	10	26	35	18	73%	195%	1	3	2
Crouchen	138	0	138	184	0%	75%	3	0	3
Doradillo	0	0	0	11		0%	0	0	1
Muscadelle	31	0	31	25	0%	125%	3	0	1
Muscat Blanc	8	0	8	10	0%	79%	1	0	1
Other white	4	4	8	6	57%	140%	1	1	1
Pedro Ximenes	46	12	58	45	21%	128%	1	1	1
Riesling	1935	1436	3371	4953	43%	68%	19	19	29
Sauvignon Blanc	229	72	301	269	24%	112%	6	5	7
Semillon	943	1192	2135	1895	56%	113%	12	15	18
Traminer	62	61	123	100	50%	124%	4	3	6
Verdelho	6	1	7	9	15%	82%	1	1	1
Viognier	0	2	2	10	100%	17%	0	1	1
<b>Total WHITE</b>	<b>5345</b>	<b>3791</b>	<b>9136</b>	<b>10910</b>	<b>41%</b>	<b>84%</b>			
<b>Grand Total (red and white)</b>	<b>14265</b>	<b>13028</b>	<b>27293</b>	<b>30203</b>					

## CLARE VALLEY PRICE AND BAUME DATA - VINTAGE 2002

Table 5.2

Variety (1)	Grower grown	Total crushed	weighted average baumé		estimated total value		lowest price (2)	highest price (2)	weighted average weighbridge price (3)	
					purchased grapes	total grapes				
<b>RED</b>										
Cabernet Franc	101	196	14.1	100%	\$118,896	\$231,855	\$720	\$1,850	\$1,183	100%
Cabernet Sauvignon	2,992	6,946	14.5	87%	\$4,685,948	\$10,876,962	\$990	\$2,600	\$1,566	100%
Grenache	345	404	14.6	98%	\$398,319	\$465,636	\$725	\$1,500	\$1,153	100%
Malbec	55	203	13.2	100%	\$85,963	\$316,629	\$1,200	\$2,075	\$1,556	100%
Mataro	8	23	14.6	100%	\$9,774	\$27,145			\$1,158	100%
Merlot	651	1,449	14.3	87%	\$907,396	\$2,018,864	\$1,065	\$1,850	\$1,394	100%
Nebbiolo	5	9	13.3	100%	\$5,500	\$9,790			\$1,100	100%
Petit Verdot	75	130	13.2	100%	\$124,067	\$216,718			\$1,664	100%
Pinot Noir	79	293	11.5	100%	\$76,682	\$284,020	\$900	\$1,200	\$971	100%
Sangiovese	23	62	14.8	79%	\$31,666	\$84,072	\$1,200	\$1,550	\$1,356	100%
Shiraz	4,902	8,401	14.4	90%	\$8,315,118	\$14,249,966	\$1,000	\$3,000	\$1,696	100%
<b>Total RED</b>	<b>9,237</b>	<b>18,116</b>			<b>\$14,759,329</b>	<b>\$28,781,657</b>				
<b>WHITE</b>										
Chardonnay	985	2,918	12.6	93%	\$1,263,826	\$3,742,334	\$960	\$2,000	\$1,282	100%
Chenin Blanc	26	35	11.6	100%	\$17,822	\$24,571	\$500	\$1,000	\$699	100%
Other white	4	7	13.6	100%	\$4,500	\$7,875			\$1,125	100%
Pedro Ximenes	12	58	8.8	100%	\$4,396	\$21,338			\$370	100%
Riesling	1,436	3,371	12.2	95%	\$1,983,990	\$4,656,734	\$800	\$1,800	\$1,382	100%
Sauvignon Blanc	72	301	12.2	100%	\$74,250	\$310,324	\$900	\$1,250	\$1,030	100%
Semillon	1,192	2,135	12.3	97%	\$1,205,005	\$2,159,084	\$650	\$1,350	\$1,011	100%
Traminer	61	123	13.5	100%	\$54,384	\$109,268	\$715	\$1,261	\$887	100%
Verdelho	1	7	12.9	100%	\$1,045	\$7,021			\$950	100%
Viognier	2	2	13.1	100%	\$2,922	\$2,922			\$1,750	100%
<b>Total WHITE</b>	<b>3,791</b>	<b>8,957</b>			<b>\$4,612,140</b>	<b>\$11,041,470</b>				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

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

(3) This price does not include end use or other bonuses paid after the weighbridge.

## CLARE VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2003 TO 2007

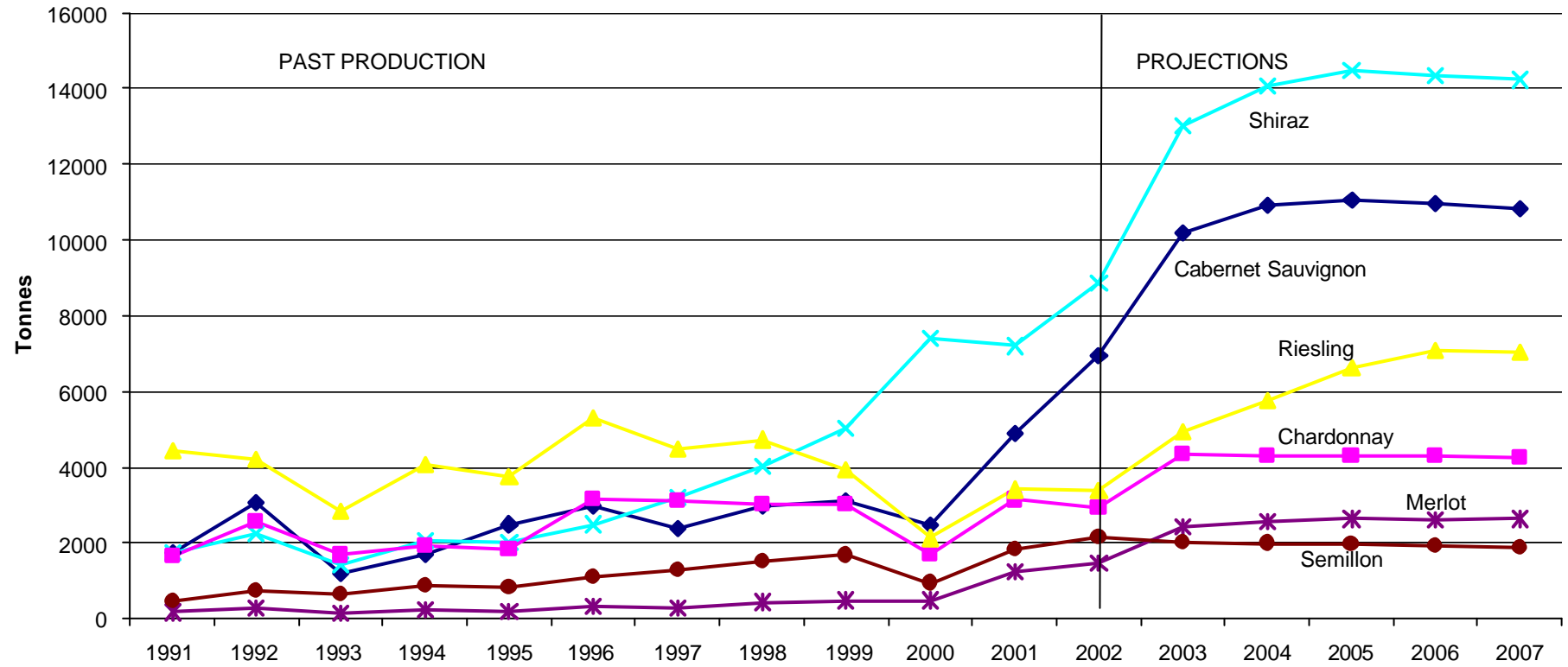
Table 5.3

Variety	2003		2004		2005		2006		2007	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
<b>RED</b>										
Barbera	20	0	24	4	26	6	26	6	26	6
Cabernet Franc	196	135	191	130	191	130	192	130	176	114
Cabernet Sauvignon	10204	9119	10901	9932	11052	10265	10980	10593	10821	10646
Grenache	447	378	459	388	445	391	391	393	363	393
Malbec	431	370	531	485	571	515	580	542	583	545
Mataro	33	26	68	61	92	85	92	85	92	85
Merlot	2416	2124	2539	2239	2629	2349	2600	2382	2625	2437
Nebbiolo	28	0	33	0	33	0	33	0	33	0
Other red	42	22	42	22	44	24	44	24	44	24
Petit Verdot	252	169	278	169	285	169	285	169	285	169
Pinot Noir	307	234	264	214	264	214	244	214	244	214
Ruby Cabernet	18	18	18	18	18	18	18	18	18	18
Sangiovese	115	79	197	109	208	120	208	120	208	120
Shiraz	13033	11757	14069	12865	14482	13343	14363	13257	14240	13687
Tempranillo	26	8	27	9	29	9	29	9	29	9
<b>Total for RED</b>	<b>27567</b>	<b>24439</b>	<b>29640</b>	<b>26645</b>	<b>30368</b>	<b>27638</b>	<b>30084</b>	<b>27942</b>	<b>29787</b>	<b>28467</b>
<b>WHITE</b>										
Chardonnay	4339	3893	4284	4047	4281	4081	4297	4091	4239	4111
Chenin Blanc	13	13	13	13	13	13	13	13	13	13
Crouchen	94	74	94	74	94	64	94	64	44	44
Doradillo	0	11	0	11	0	12	0	12	0	12
Muscadelle	27	25	17	15	17	15	15	15	15	15
Muscat Blanc	12	12	12	12	12	12	12	12	12	12
Pedro Ximenes	45	45	50	45	50	45	50	45	50	45
Riesling	4945	6103	5745	6882	6642	7712	7063	8225	7048	8596
Sauvignon Blanc	286	233	278	241	278	243	282	246	285	246
Semillon	2005	1388	1987	1457	1967	1587	1923	1752	1883	2014
Traminer	142	97	160	101	169	102	170	102	170	102
Verdelho	9	12	15	20	20	25	25	25	25	25
Viognier	9	15	12	23	15	36	19	50	19	50
<b>Total for WHITE</b>	<b>11926</b>	<b>11921</b>	<b>12667</b>	<b>12941</b>	<b>13558</b>	<b>13947</b>	<b>13964</b>	<b>14652</b>	<b>13804</b>	<b>15285</b>

# CLARE VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2007

Figure 5.1

Past production and projections (major varieties)



## CLARE VALLEY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 5.4

## Year planted - area in hectares

Variety	Pre-98	1998	1999	2000	2001	Total	% planted in 2001
<b>RED WINEGRAPES</b>							
CABERNET FRANC	27	2	2	-	-	31	0%
CABERNET SAUVIGNON	765	218	125	61	16	1185	1%
GRENACHE	59	2	-	4	2	67	4%
MALBEC	34	11	24	1	0	71	1%
MATARO	1	2	1	4	3	11	28%
MERLOT	154	70	32	2	2	260	1%
PETIT VERDOT	8	11	1	-	-	20	0%
PINOT NOIR	23	-	-	-	-	23	0%
SANGIOVESE	7	7	13	4	-	31	0%
SHIRAZ	860	281	251	119	44	1555	3%
TEMPRANILLO	0	0	4	1	2	7	26%
OTHER RED	8	1	7	3	1	19	7%
<b>TOTAL RED WINEGRAPES</b>	<b>1946</b>	<b>606</b>	<b>458</b>	<b>199</b>	<b>71</b>	<b>3280</b>	<b>2%</b>
<b>WHITE WINEGRAPES</b>							
CHARDONNAY	342	-	0	-	1	344	0%
PEDRO XIMENEZ	13	-	-	-	-	13	0%
RIESLING	503	25	40	60	49	677	7%
SAUVIGNON BLANC	35	-	-	-	0	35	1%
SEMILLON	192	9	1	-	3	205	1%
TRAMINER	11	-	-	-	0	12	3%
VERDELHO	2	-	-	1	1	4	23%
VIOGNIER	0	2	1	2	-	5	0%
OTHER WHITE	20	0	0	1	0	22	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>1120</b>	<b>37</b>	<b>42</b>	<b>64</b>	<b>54</b>	<b>1317</b>	<b>4%</b>
<b>TOTAL ALL VARIETIES</b>	<b>3066</b>	<b>642</b>	<b>500</b>	<b>263</b>	<b>125</b>	<b>4597</b>	<b>3%</b>