

2009 WFA VINTAGE REPORT

June 2009

National winegrape crush declines

Australia's winegrape crush declined by 7% or about 125,400 tonnes in 2009.

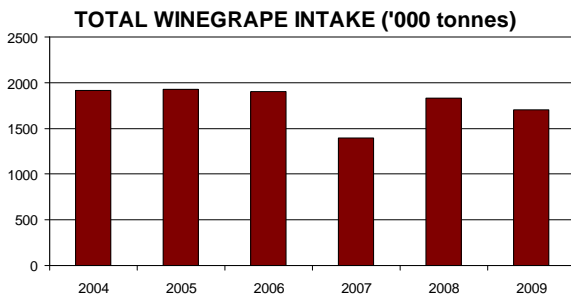
The total intake was 1.71 million tonnes, compared with 1.83 million in 2008.

This was below the five-year average of 1.79 million tonnes but still higher than estimated and greater than required to meet current demand.

Conditions provided for a good vintage in many regions, despite difficulties associated with drought, high temperatures and water shortages.

Red winegrapes recorded a slightly larger decline than white, but still accounted for 52% of total intake. The red intake fell 8% to 888,300 tonnes, while white fell 5% to 817,700 tonnes.

Since 2001, the red intake has exceeded white in every year except 2007.



Source: ABS Catalogue No: 1329.0 Australian Wine & Grape Industry.
Note: 2009 – WFA estimate

Shiraz regains top spot

Shiraz regained its position as Australia's most popular variety for the first time since 2006, accounting for 23.6% of total crush, compared with 23.4% for Chardonnay. This was despite the Shiraz intake declining by about 36,400 tonnes (8%) to 403,100 tonnes.

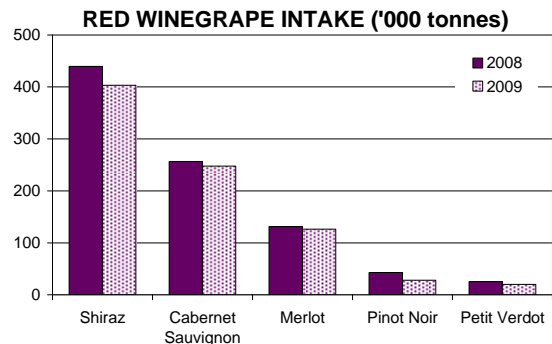
Cabernet Sauvignon fell marginally to 247,500 tonnes, maintaining its position as second most popular red variety (28% of red intake) and third overall (14.5% of total intake).

Merlot also fell only slightly to 126,370 tonnes, accounting for 14% of red intake and 7% of total intake.

The **Pinot Noir** intake fell by 35% to 28,000 tonnes, reflecting the challenging heat conditions in some premier Pinot Noir regions. While contributing only 1.6% of the total crush it accounted for 12% of the overall decline in intake for the year.

Other red winegrapes to show significant movement, albeit from a small base, were Tarrango (down 79% to 449 tonnes), Barbera (down 76% to 117 tonnes), Malbec (down 34% to 1,479 tonnes) and Ruby Cabernet (down 22% to 13,243 tonnes).

No red varieties showed an increase in intake in 2009 compared with 2008.



Source: WFA

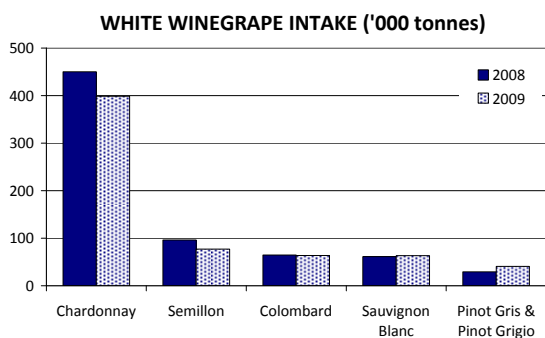
White intake more stable

While dropping to second behind Shiraz overall, **Chardonnay** remained the clearly dominant white variety, accounting for 49%. Its 2009 intake was 398,600, a decline of 11%.

Of greater note, however, was the growth of **Sauvignon Blanc**, which increased 3% to 63,300 tonnes (representing 4% of total crush), and the even stronger showing by **Pinot Gris & Grigio** (up 38% to 40,500 tonnes), which moved ahead of **Riesling** (down 2% to 36,900).

Viognier also showed growth (up 13% to 13,300).

Semillon remained the second most popular white variety (down 20% to 76,900), followed by **Colombard**, which fell only 1% to 63,600.



Survey Methodology

This survey is the first quantitative national measure of the 2009 vintage, and is used widely by industry, industry analysts and media.

In April 2009, wineries were sent an email survey to determine the industry's 2009 winegrape crush. Wineries were asked to provide details of their intakes for both 2008 and 2009 for processing into wine, brandy, spirit or juice.

Responses were received from more than 340 wineries, covering an estimated 89% of the industry's winegrape intake. The aggregated data for the 2009 vintage was compared to the aggregated data for the 2008 vintage to obtain the relative change in the size of the intake. This was then compared to the ABS 2008 intake to estimate the size of the 2009 intake. It should be noted that the intake estimates for each variety in both 2008 and 2009 are derived from each variety's respective share of the total crush reported by respondents to the 2009 Vintage survey.

Australian Winegrape Intake

Variety	2008 tonnes	2009 tonnes	2009 % Share	2008-2009 % Change
Red Grapes				
Barbera	494	117	0.0%	-76%
Cabernet Franc	2,534	2,310	0.1%	-9%
Cabernet Sauvignon	256,550	247,511	14.5%	-4%
Durif	5,054	4,518	0.3%	-11%
Grenache	16,249	15,170	0.9%	-7%
Malbec	2,237	1,479	0.1%	-34%
Mataro	6,752	6,165	0.4%	-9%
Merlot	130,988	126,367	7.4%	-4%
Muscat a Petit Grains	824	753	0.0%	-9%
Petit Verdot	25,091	20,105	1.2%	-20%
Pinot Noir	42,910	28,018	1.6%	-35%
Ruby Cabernet	16,892	13,243	0.8%	-22%
Sangiovese	5,228	3,921	0.2%	-25%
Shiraz	439,414	403,062	23.6%	-8%
Tarrango	2,122	449	0.0%	-79%
Other Red	15,840	15,124	0.9%	-5%
Total Red Grapes	969,179	888,312	52%	-8%
White Grapes				
Chardonnay	450,001	398,576	23.4%	-11%
Chenin Blanc	8,363	8,259	0.5%	-1%
Colombard	64,410	63,602	3.7%	-1%
Doradillo	1,022	1,106	0.1%	8%
Marsanne	1,753	1,678	0.1%	-4%
Muscadelle	555	567	0.0%	2%
Muscat a Petit Grains Blanc	1,792	2,432	0.1%	36%
Muscat Gordo Blanco	43,279	56,782	3.3%	31%
Palomino & Pedro Ximenes	382	222	0.0%	-42%
Pinot Gris and Pinot Grigio	29,354	40,546	2.4%	38%
Riesling	37,597	36,880	2.2%	-2%
Sauvignon Blanc	61,123	63,253	3.7%	3%
Semillon	96,060	76,879	4.5%	-20%
Sultana	8,602	8,332	0.5%	-3%
Traminer	11,042	10,483	0.6%	-5%
Trebbiano	2,648	1,915	0.1%	-28%
Verdelho	18,486	15,051	0.9%	-19%
Viognier	11,805	13,338	0.8%	13%
Other White	14,068	17,839	1.0%	27%
Total White Grapes	862,344	817,740	48%	-5%
Total Grapes	1,831,523	1,706,052	100%	-7%

Note: Winegrape tonnages and percentage changes are rounded to the nearest whole number.

Source: ABS (2008), WFA (2009)

For more information contact Susan Bell or Stephen Strachan at the Winemakers' Federation of Australia

Ph: (08) 8222 9255, Fax: (08) 8222, 9250 or email: wfa@wfa.org.au