

# Adelaide Hills Wine Region

## Regional summary report

**2011**

DATUM: GDAS4  
 PROJECTION: MGA Zone 54  
 DATE: 8<sup>th</sup> April 2011  
 SOFTWARE: ESRI ArcGIS v10  
 DATA SOURCE:  
 Vineyard Blocks - PGISSA  
 Wine Regions - Wine Australia  
 Localities - SA Gazetteer  
 Roads - DTB

### Adelaide Hills Wine Region

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# Explanations and Definitions

## INTAKE (CURRENT VINTAGE) DATA

### *Definition of regions*

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from the Board's office.

### *Total crush*

The **total crushed** is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia that are known to source fruit from South Australian vineyards are included in the survey collection process. However, not all wineries submit a survey form - therefore the total tonnage reported may underestimate the true crush. An estimate of the non-response rate for each region is provided below each intake summary report. Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

### *Crop value data*

On the survey forms, wineries are asked to record **total purchase value**. This is the total amount paid for fruit of a particular variety at the point of receipt – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted.

The **calculated average purchase value per tonne** is the average amount paid per tonne of fruit across all wineries. Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements. The **estimated total value of purchased grapes** is calculated by multiplying the average purchase value per tonne by the total tonnes purchased. The **estimated total value of total grapes** is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

*Note: in small varieties there may sometimes be only one winery contributing towards a calculated average purchase value per tonne.*

### **Important note on average purchase value**

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts. Therefore the average price should not be compared directly with an individual grower's arrangement.

### *Highest and lowest price*

Wineries are asked to report the highest and lowest prices paid for any parcel of fruit of a particular variety, of any size. The highest of all highest prices, and the lowest of all lowest prices are reported – provided that at least three wineries have provided this information for any particular variety. *Note: the highest or lowest price may be for a very small parcel of fruit - and/or reflect an unusual pricing arrangement - eg payment by the hectare rather than per tonne, "spot market" sales of excess fruit etc.*

## FORECASTS

### *Estimated supply*

Supply forecasts have been calculated independently using the planting information obtained from the PGIBSA vineyard register (see below). They are calculated by multiplying the area of vines by an estimated yield figure determined separately for each variety in each region, which takes into account industry practices and objectives as well as historical averages. However, the supply forecasts do not make any allowance for future vine removals or mothballing, yield capping or the effects of ongoing water restrictions or unusual seasonal conditions.

### *Committed intake*

Committed intake is the amount of fruit that wineries are *already* committed to take in, for a given future year. It is made up of winery grown fruit and contract purchases. Only existing or ongoing contracts are included – not intended future signings or renewals.

# Explanations and Definitions

## *Available supply*

Available supply (uncommitted fruit) is the difference between estimated supply and committed intake. It is the amount of fruit estimated to be available on the open (spot) market. NB If the committed intake is higher than the estimated supply, this indicates a discrepancy between the independent supply forecasts and the wineries' estimates of future production. In this case, available supply is recorded as zero – rather than as a negative number.

## *Comparing supply and committed intake*

In order to compare supply with committed intake, the latter figures are “raised” to compensate for non-respondents. There is no raising of supply figures because it is assumed that the PGIBSA vineyard planting information is close to 100% complete. The non-response rate is calculated separately for each region and is indicated below the relevant tables.

## PLANTING DATA

### *Derivation of planting data tables*

Planting data is **not** derived from the 2011 South Australian Utilisation and Pricing Survey of wineries. The information is obtained from the vineyard register maintained by the Phylloxera and Grape Industry Board of South Australia.

The Board is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of grapegrowers in the state. All vineyard owners with more than 0.5 hectares are required by law to register with the Board, and to complete an accurate vineyard return each year, giving details of their plantings. This information is kept strictly confidential. An accurate vineyard register enables the Board to produce complete, up-to-date statistical information on vineyard plantings by variety, year planted and location.

For more information on registration of vineyards, please contact the Phylloxera and Grape Industry Board office on 08 8362 0488.

### *Explanatory notes for planting data tables*

1. Planting data tables are current as at April 2011 and include all plantings from the 2010 planting season. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the 2011 report compared with previous reports.
2. Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from the Board.
3. Where a 0 appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce a slight error in totals or percentages.

## Adelaide Hills

## Vintage overview

### *Vintage report*

Late winter and early spring months produced average rainfall, which replenished soil moisture and filled most dams. The early season rainfall meant minimal supplementary irrigation on most vineyards was required until late December.

Budburst began in late September for early varieties such as Chardonnay and Pinot noir and early October for later varieties, Sauvignon Blanc and Shiraz.

Cool to mild conditions persisted through October, November and December, resulting in the flowering period commencing later than previous years, late November and early December for early and late varieties respectively. The flowering period was also extended due to the cool conditions and ranged between 12 to 16 days.

In addition, a Downy Mildew primary event occurred during in late November coinciding with flowering, and secondary events were reported in early December. This period was also conducive to Powdery Mildew due to extended periods of overcast conditions. This prompted many growers to increase the frequency of cover sprays.

Mild conditions continued through the new year with an unusually cool summer. Bunch closure occurred between early and late January, with veraison occurring for most varieties in mid February.

Downy Mildew secondary events were also reported during January, February and March; however, most growers had maintained good control of mildews during this period.

The cool, and at times, wet conditions resulted in slow ripening and reports of Botrytis development particularly in Chardonnay and some of the later reds.

While ripening was slower than normal flavour development was early, and all varieties expressed strong varietal characteristics at lower than normal Brix levels. This prompted most wineries to commence harvest at slightly lower Brix than in previous years. Nevertheless, for most growers the commencement of vintage was later than the previous eight vintages.

Most varieties and growers were affected to varying levels by bunch rots with reports suggesting Chardonnay and Shiraz experienced the greatest losses.

Where growers had intervened early to carry out canopy management operations and crop thinning, crops achieved target Brix levels and were harvested in good condition. Some bunch thinning to remove diseased fruit

prior to machine harvesting was carried out by many growers, and in addition considerably more hand harvesting was carried out in the region this vintage to ensure clean samples were delivered to wineries.

While there was an impact on overall yield through diseased fruit, efforts by growers to ensure clean fruit was delivered to wineries and the cool ripening conditions resulted in extremely good samples of wine expressing strong varietal characteristics which is expected to deliver great wines with strong cool climate varietal and regional characteristics.

*Murray Leake*

*Australian Vintage Ltd and Adelaide Hills Wine Region*

### *Overview of vintage statistics*

The harvest from the Adelaide Hills was 21,871 tonnes in 2011, down 22% on the 2010 harvest of 28,161 tonnes. The total value of grapes from the Adelaide Hills decreased significantly from \$33 million to \$24.2 million. The average purchase value for the major varieties decreased, with Sauvignon Blanc falling to \$1,198 per tonne, \$713 per tonne down on the record value of \$1911 tonnes in 2008. Chardonnay rose slightly to \$1,007 per tonne, up by 3.7% since the record low in 2008 of \$971 tonnes.

There were 26 hectares of new plantings in the Adelaide Hills in the 2010 season (including top-working and replacements), with 54% Pinot Noir and 27% Shiraz. There were no new plantings for Sauvignon Blanc.

The estimated production from the Adelaide Hills region for 2012 is 26,000 tonnes with 21,600 tonnes committed to the wineries, leaving around 4,400 tonnes (20%) uncontracted.

In 2016, the estimated production for the Adelaide Hills climbs slightly to 26,500 tonnes, of which only 11,000 tonnes is already under contract or winery grown fruit. This proportion of already committed fruit is almost one-half but leaves around 15,400 tonnes yet to be contracted, or available on the open market.

# Adelaide Hills

## Winegrape intake summary - vintage 2011

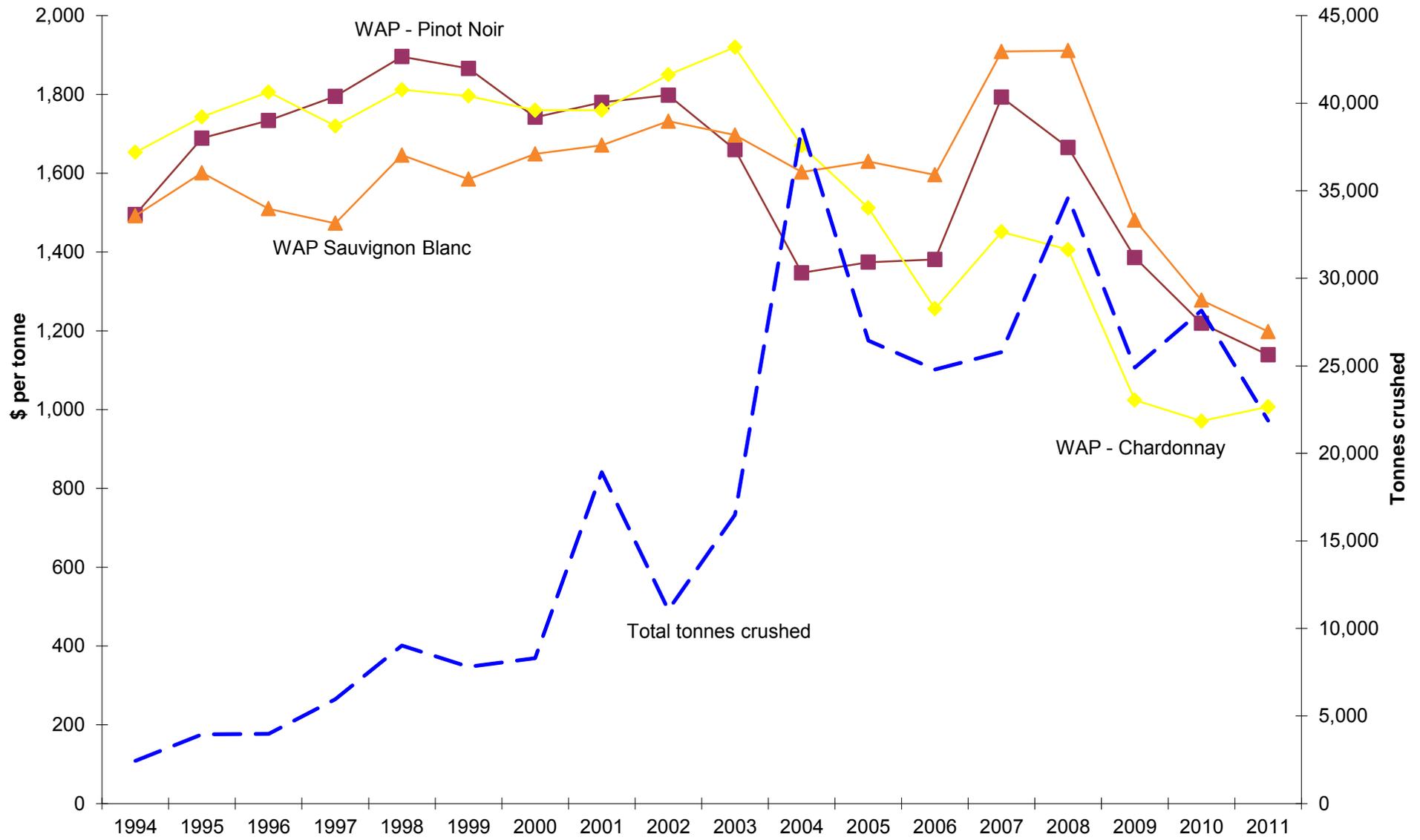
Variety	Tonnes purchased	Lowest price <sup>1</sup>	Highest price <sup>1</sup>	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed <sup>2</sup>	Est total value ALL grapes
<b>RED</b>								
Barbera	4			\$6,190	\$1,587	0	4	\$6,190
Cabernet Franc	0			\$0	\$0	16	16	\$17,560
Cabernet Sauvignon	635	\$500	\$1,800	\$658,466	\$1,037	259	894	\$927,234
Malbec	6			\$6,000	\$1,000	0	6	\$6,000
Mataro	3			\$3,738	\$1,400	0	3	\$3,738
Merlot	455	\$300	\$1,800	\$369,745	\$813	109	564	\$458,247
Meunier	244	\$700	\$1,800	\$250,663	\$1,029	0	244	\$250,663
Nebbiolo	12			\$34,716	\$3,000	0	12	\$34,716
Other Red	9			\$17,488	\$1,983	11	20	\$38,902
Pinot Noir	3,688	\$500	\$2,910	\$4,202,326	\$1,139	610	4,298	\$4,897,567
Sangiovese	81	\$500	\$1,200	\$72,133	\$886	0	81	\$72,133
Shiraz	533	\$400	\$3,500	\$592,624	\$1,111	361	895	\$994,020
Tempranillo	47	\$1,350	\$2,000	\$74,331	\$1,574	46	93	\$147,025
Zinfandel	0			\$0	\$0	30	30	\$32,375
<b>Total Red winegrapes</b>	<b>5,717</b>			<b>\$6,288,419</b>		<b>1,442</b>	<b>7,159</b>	<b>\$7,886,369</b>
<b>WHITE</b>								
Chardonnay	2,838	\$220	\$4,300	\$2,856,890	\$1,007	920	3,758	\$3,782,999
Chenin Blanc	3			\$3,600	\$1,200	0	3	\$3,600
Muscat a Petit Grains Blanc	14			\$11,522	\$819	0	14	\$11,522
Other White	45	\$800	\$2,000	\$68,460	\$1,513	27	72	\$109,136
Pinot Gris	1,073	\$350	\$2,600	\$1,322,637	\$1,233	780	1,853	\$2,284,975
Riesling	235	\$556	\$2,150	\$175,758	\$748	77	312	\$233,112
Sauvignon Blanc	4,792	\$350	\$3,226	\$5,739,212	\$1,198	2,880	7,672	\$9,188,657
Semillon	394	\$350	\$1,500	\$317,396	\$805	400	794	\$639,307
Traminer	77			\$26,789	\$350	79	156	\$54,600
Verdelho	17			\$10,128	\$600	0	17	\$10,128
Viognier	38			\$30,074	\$799	23	61	\$48,812
<b>Total White winegrapes</b>	<b>9,525</b>			<b>\$10,562,466</b>		<b>5,187</b>	<b>14,712</b>	<b>\$16,366,849</b>
<b>Total All winegrapes</b>	<b>15,242</b>			<b>\$16,850,885</b>		<b>6,629</b>	<b>21,871</b>	<b>\$24,253,218</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> It is estimated that the non-response rate for Adelaide Hills is 4%.

# Adelaide Hills

## Historical Weighted Average Price vs tonnes crushed



## Adelaide Hills

## Current plantings by variety and year planted

Variety	Current area in hectares					Total area	% planted in 2010
	Pre-2008	2008	2009	2010			
<b>Red winegrapes</b>							
Cabernet Franc	6	0	0	0	6	0%	
Cabernet Sauvignon	218	0	0	0	218	0%	
Grenache	3	0	0	0	3	0%	
Merlot	207	0	0	0	207	0%	
Meunier (Pinot Meunier)	26	0	0	0	26	0%	
Nebbiolo	7	1	0	1	9	11%	
Other red	13	3	6	1	23	4%	
Petit Verdot	2	0	0	0	2	0%	
Pinot Noir	566	45	27	14	652	2%	
Sangiovese	8	1	0	0	9	0%	
Shiraz	312	0	5	7	325	2%	
Tempranillo	15	2	5	1	23	4%	
<b>Total red varieties</b>	<b>1,383</b>	<b>51</b>	<b>44</b>	<b>24</b>	<b>1,502</b>	<b>2%</b>	
<b>White winegrapes</b>							
Chardonnay	852	0	0	0	852	0%	
Muscat A Petit Grains Blanc	1	0	0	0	1	0%	
Other white	11	16	13	1	41	2%	
Pinot Gris	226	26	10	0	262	0%	
Riesling	95	0	1	0	96	0%	
Sauvignon Blanc	974	46	11	0	1,032	0%	
Semillon	81	0	0	0	81	0%	
Traminer (Gewurztraminer)	23	0	2	0	25	0%	
Verdelho	11	1	0	0	12	0%	
Viognier	59	1	0	0	59	0%	
<b>Total white varieties</b>	<b>2,333</b>	<b>90</b>	<b>37</b>	<b>1</b>	<b>2,462</b>	<b>0%</b>	
Rootstock Block	2	0	0	0	2	0%	
Unknown variety	26	0	0	0	26	0%	
<b>Total for all varieties</b>	<b>3,744</b>	<b>141</b>	<b>81</b>	<b>26</b>	<b>3,992</b>	<b>1%</b>	

# Adelaide Hills

## Estimated supply and committed intake 2012 - 2016

Variety	2012				2014				2016			
	Est Supply <sup>1</sup>	Committed intake <sup>2</sup>			Est Supply <sup>1</sup>	Committed intake <sup>2</sup>			Est Supply <sup>1</sup>	Committed intake <sup>2</sup>		
		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake
<b>Red winegrapes</b>												
Barbera	7	0	2	2	7	0	2	2	7	0	2	2
Cabernet Franc	22	21	0	21	22	21	0	21	22	21	0	21
Cabernet Sauvignon	873	323	615	938	873	323	203	526	873	323	93	416
Malbec	0	0	6	6	0	0	6	6	0	0	6	6
Mataro	0	0	3	3	0	0	3	3	0	0	5	5
Merlot	1,033	128	436	564	1,033	124	221	345	1,033	124	221	345
Meunier	155	0	261	261	155	0	100	100	155	0	33	33
Nebbiolo	40	21	0	21	44	21	0	21	44	21	0	21
Other Red	287	27	5	32	292	28	0	28	292	28	0	28
Pinot Noir	4,888	837	2,686	3,523	5,052	849	1,427	2,276	5,052	758	1,242	2,000
Sangiovese	52	5	52	57	54	6	0	6	54	6	0	6
Shiraz	1,261	666	691	1,357	1,275	694	357	1,051	1,275	715	227	942
Tempranillo	75	40	10	50	79	43	0	43	79	43	0	43
Zinfandel	0	31	0	31	0	31	0	31	0	31	0	31
<b>Total red winegrapes</b>	<b>8,716</b>	<b>2,100</b>	<b>4,768</b>	<b>6,867</b>	<b>8,909</b>	<b>2,140</b>	<b>2,320</b>	<b>4,460</b>	<b>8,909</b>	<b>2,071</b>	<b>1,830</b>	<b>3,900</b>
<b>White winegrapes</b>												
Chardonnay	5,112	1,144	3,689	4,833	5,112	1,108	1,048	2,156	5,112	866	712	1,578
Chenin Blanc	0	0	10	10	0	0	10	10	0	0	10	10
Muscat a Petit Grains Blanc	0	0	16	16	0	0	5	5	0	0	5	5
Other White	256	36	63	99	327	44	63	106	327	48	45	93
Pinot Gris	1,996	713	737	1,450	2,059	731	668	1,399	2,059	209	667	875
Riesling	670	98	504	602	670	106	95	201	670	106	70	176
Sauvignon Blanc	8,095	2,515	4,187	6,701	8,207	2,640	2,623	5,263	8,207	2,098	1,692	3,790
Semillon	567	539	314	853	567	539	151	690	567	321	68	389
Traminer	191	9	0	9	191	9	0	9	191	9	0	9
Verdelho	82	0	42	42	84	0	0	0	84	0	0	0
Viognier	356	70	62	131	357	70	30	100	357	70	30	100
<b>Total white winegrapes</b>	<b>17,325</b>	<b>5,125</b>	<b>9,622</b>	<b>14,746</b>	<b>17,575</b>	<b>5,247</b>	<b>4,693</b>	<b>9,940</b>	<b>17,575</b>	<b>3,727</b>	<b>3,299</b>	<b>7,026</b>
<b>All winegrapes</b>	<b>26,041</b>	<b>7,224</b>	<b>14,389</b>	<b>21,614</b>	<b>26,483</b>	<b>7,387</b>	<b>7,013</b>	<b>14,401</b>	<b>26,483</b>	<b>5,798</b>	<b>5,129</b>	<b>10,927</b>

<sup>1</sup> Supply forecast produced by PGIBSA based on the South Australian vineyard register

<sup>2</sup> A raising factor of 1.04 has been applied to committed intake to allow for non-respondents