

Adelaide Hills Wine Region

Regional summary report

2012

DATUM: GDA94
 PROJECTION: MGA Zone 54
 DATE: 2nd April 2011
 SOFTWARE: ESRI ArcGIS v10
 DATA SOURCE:
 Vineyard Blocks - PGBSA
 Wine Regions - Wine Australia
 Localities - SA Gazetteer
 Roads - DTE

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 2012 South Australian Crush 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 report

Leading into September and just prior to budburst, winter rainfall was close to long term average for most parts of the Adelaide Hills resulting in soil moisture profiles being full. Weather conditions were in line with the long term average however, there were fluctuations between short periods of warmer than average days followed by similar periods of very cool temperatures. This resulted in some variable bud burst and shoot development in most varieties.

Weather conditions continued to be variable through the period from October to December with a cooler than average period through the flowering period in late November. While weather conditions were variable, accumulated heat and degree days by mid November resulted in vine phenology being earlier than average, suggesting an early vintage.

Early season yield estimates indicated crop levels to be slightly below average due to lower bunch numbers, and the variable weather conditions, especially during the flowering period, further compounded the potential for low crop levels by affecting berry set, and potential harvest bunch weight.

With disease pressure, the season was moderate with an early season of Downey Mildew in October, and a number of vineyards within the region reported incidence of infection on the foliage. However, most growers had learnt from the previous season and applied appropriate controls. Conditions were also conducive to Powdery Mildew and most growers were diligent and maintained good control. Similarly there were late flights of Light Brown Apple Moth and again most growers seemed to control numbers and resulting damage.

Weather conditions remained mild during summer, with a few short periods of hot weather where temperatures exceeded 30°C. Generally, conditions during the majority of the ripening period were ideal, with mild day time temperatures and cold nights frequently below 10°C, all conducive to excellent flavour development and the retention of natural acidity in the fruit.

Harvest commenced in early February with Chardonnay and Pinot Noir for sparkling, and a week later with Sauvignon Blanc. Lower than average crop levels contributed to fruit ripening relatively fast, resulting in another condensed vintage. The majority of fruit was harvested by the 2nd and 3rd week of March with the later reds completed by the end of March. Rainfall experienced in the 2nd and 3rd week of March had little effect on fruit quality, as the majority of fruit had been harvested.

Vintage overview

Most varieties yielded 25 -50% below average, with some reports of Pinot Noir and Shiraz being 75% lower than average, similar to yields experienced in 2002, another cool vintage.

In summary, the combination of low crop levels, and mild conditions during the ripening period has resulted in some of the best quality fruit for a number of years.

Murray Leake

Australian Vintage Ltd and Adelaide Hills Wine Region

Overview of vintage statistics

The harvest from the Adelaide Hills was 17,276 tonnes in 2012, down 21% on the 2011 harvest of 21,871 tonnes. The total value of grapes from the Adelaide Hills continued to decline from \$24.2 million to \$20.5million. The average purchase value for the major varieties slightly increased, with Sauvignon Blanc up by \$82 per tonne to \$1,280 per tonne; Chardonnay up by \$82 per tonne to \$1,088 per tonne and Pinot Noir up by \$73 per tonne to \$1,212 per tonne.

There were 38 hectares of new plantings in the Adelaide Hills in spring 2011 (including top-working and replacements), with 34% Shiraz, 13% Pinor Noir and 8% Sauvignon Blanc.

The estimated production from the Adelaide Hills region for 2013 is around 26,000 tonnes with 18,100 tonnes committed to the wineries, leaving around 7,900 tonnes (43.6%) uncontracted.

In 2017, the estimated production for the Adelaide Hills rises slightly to 26,200 tonnes, of which only 13,000 tonnes is already under contract or winery grown fruit. This proportion of already committed fruit is one-half but which leaves around 13,200 tonnes yet to be contracted, or available on the open market.

Adelaide Hills

Winegrape intake summary - vintage 2012

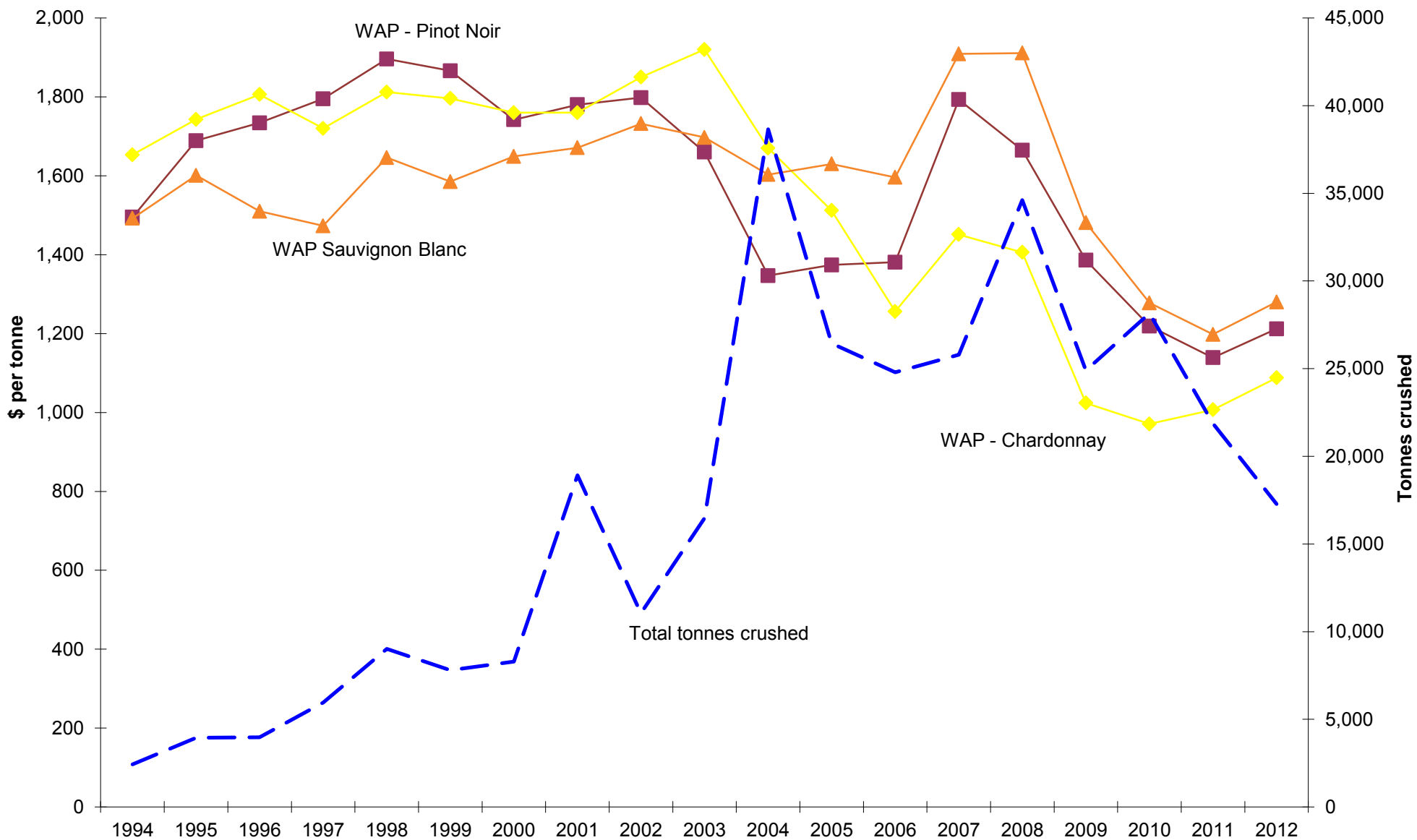
Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
RED								
Barbera	6			\$8,475	\$1,500	0	6	\$8,475
Cabernet Franc	0			\$0	\$0	9	9	\$10,177
Cabernet Sauvignon	378	\$500	\$3,000	\$468,316	\$1,238	131	510	\$630,772
Grenache	0			\$0	\$0	3	3	\$3,575
Mataro	9			\$13,080	\$1,436	0	9	\$13,080
Merlot	744	\$500	\$1,800	\$622,190	\$837	149	893	\$746,661
Meunier	130	\$850	\$2,355	\$145,443	\$1,122	0	130	\$145,443
Other Red	27	\$1,500	\$2,200	\$53,800	\$1,976	28	55	\$108,351
Pinot Noir	2,707	\$700	\$3,000	\$3,280,696	\$1,212	335	3,042	\$3,686,606
Sangiovese	42			\$43,316	\$1,029	27	70	\$71,603
Shiraz	688	\$100	\$3,050	\$990,608	\$1,440	294	982	\$1,413,472
Tempranillo	26	\$1,000	\$1,800	\$41,296	\$1,609	14	39	\$63,309
Zinfandel	0			\$0	\$0	4	4	\$4,409
Total Red winegrapes	4,757			\$5,667,219		993	5,750	\$6,905,932
WHITE								
Chardonnay	3,750	\$300	\$4,300	\$4,079,067	\$1,088	480	4,230	\$4,600,936
Muscat a Petit Grains Blanc	14			\$11,072	\$800	0	14	\$11,072
Other White	69	\$700	\$2,000	\$95,884	\$1,391	3	72	\$100,391
Pinot Gris	794	\$550	\$2,500	\$1,086,942	\$1,370	392	1,186	\$1,624,140
Riesling	432	\$195	\$2,320	\$308,551	\$714	30	462	\$330,149
Sauvignon Blanc	3,780	\$300	\$3,415	\$4,839,538	\$1,280	1,292	5,072	\$6,493,267
Semillon	256	\$450	\$1,500	\$195,064	\$761	41	297	\$225,996
Traminer	74	\$700	\$1,800	\$63,998	\$860	14	89	\$76,125
Verdelho	30			\$26,556	\$874	8	39	\$33,678
Viognier	42	\$1,030	\$1,800	\$56,176	\$1,328	24	66	\$88,089
Total White winegrapes	9,242			\$10,762,848		2,284	11,526	\$13,583,843
Total All winegrapes	13,999			\$16,430,067		3,277	17,276	\$20,489,776

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 Adelaide Hills is 28.3%.

Adelaide Hills

Historical Weighted Average Price vs tonnes crushed



Adelaide Hills

Current plantings by variety and year planted

Variety	Current area in hectares					% planted in 2011
	Pre-2009	2009	2010	2011	Total area	
Red winegrapes						
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	216	0	0	0	216	0%
Grenache	2	0	0	0	2	0%
Merlot	193	0	0	0	193	0%
Meunier (Pinot Meunier)	25	0	0	0	25	0%
Nebbiolo	8	0	1	0	9	0%
Other red	15	6	1	1	24	6%
Petit Verdot	2	0	0	0	2	0%
Pinot Noir	600	28	14	5	647	1%
Sangiovese	9	0	0	1	10	11%
Shiraz	305	5	9	13	332	4%
Tempranillo	16	5	2	3	27	12%
Total red varieties	1,397	44	26	23	1,492	2%
White winegrapes						
Chardonnay	839	0	0	1	840	0%
Muscat Blanc (Frontignac)	1	0	0	0	1	0%
Other white	42	14	2	8	67	12%
Pinot Gris	244	10	0	3	258	1%
Riesling	89	1	0	0	90	0%
Sauvignon Blanc	1,019	11	1	3	1,035	0%
Semillon	77	0	0	0	77	0%
Traminer	23	2	0	0	24	0%
Verdelho	11	0	0	0	11	0%
Viognier	49	0	0	0	49	0%
Total white varieties	2,395	39	4	15	2,452	1%
Rootstock Block	2	0	0	0	2	0%
Unknown variety	24	0	0	0	24	0%
Total all varieties	3,818	83	30	38	3,969	1%

Adelaide Hills

Estimated supply and committed intake 2013 - 2017

Variety	Est Supply ¹	2013			Est Supply ¹	2015			Est Supply ¹	2017		
		Committed intake ²				Committed intake ²				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	7	0	18	18	10	6	20	25	10	17	25	42
Cabernet Franc	22	11	0	11	22	11	0	11	22	11	0	11
Cabernet Sauvignon	863	235	579	814	863	235	397	633	863	235	238	473
Grenache	11	0	0	0	11	0	0	0	11	0	0	0
Mataro	0	0	12	12	0	0	12	12	0	0	12	12
Merlot	964	142	329	471	964	142	277	419	964	142	228	370
Meunier	148	0	124	124	148	0	41	41	148	0	41	41
Other Red	135	6	41	47	135	8	19	26	135	8	19	26
Pinot Noir	5,070	724	2,256	2,981	5,125	760	1,714	2,474	5,125	727	1,514	2,241
Sangiovese	54	0	50	50	57	0	50	50	57	0	50	50
Shiraz	1,246	470	804	1,274	1,292	481	458	939	1,292	481	310	791
Tempranillo	92	28	39	66	98	33	28	61	98	33	20	53
Zinfandel	0	8	0	8	0	11	0	11	0	0	0	0
Total red winegrapes	8,661	1,624	4,251	5,875	8,777	1,687	3,014	4,701	8,777	1,654	2,455	4,109
White winegrapes												
Chardonnay	5,038	891	3,131	4,022	5,039	926	1,260	2,185	5,039	926	772	1,698
Colombard	0	165	99	264	0	275	275	550	0	275	275	550
Muscat a Petit Grains Blanc	0	0	0	0	0	0	0	0	0	0	0	0
Other White	296	18	85	102	313	37	92	130	313	54	92	146
Pinot Gris	2,049	752	535	1,287	2,047	763	520	1,284	2,047	733	518	1,251
Riesling	633	56	75	130	631	56	80	136	631	56	41	96
Sauvignon Blanc	8,258	2,445	3,472	5,917	8,261	2,459	2,694	5,153	8,261	2,459	2,196	4,654
Semillon	542	232	133	365	542	201	38	239	542	149	0	149
Traminer	196	4	7	11	194	4	7	11	194	4	7	11
Verdelho	77	0	11	11	77	0	17	17	77	0	17	17
Viognier	294	51	48	100	294	49	48	97	294	49	48	97
Total white winegrapes	17,385	4,614	7,594	12,208	17,399	4,770	5,031	9,802	17,399	4,703	3,966	8,669
All winegrapes	26,046	6,238	11,845	18,083	26,176	6,457	8,045	14,503	26,176	6,357	6,421	12,778

¹ Supply forecast produced by PGIBSA based on the South Australian vineyard register

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