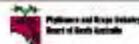


SA Winegrape Crush Survey Regional Summary Report - 2014

Adelaide Plains Wine Region

DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 30th July 2013
SOFTWARE: ESRI ArcGIS v10.1
DATA SOURCE:
Vineyard Blocks - PGIBSA
Wine Regions - Wine Australia
Localities - SA Gazetteer
Roads - GTE

Adelaide Plains 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 and committed intake

The estimated supply and committed intake report has been removed from the 2014 Winegrape Crush Survey. It has been identified that the methodology used to determine the estimated supply requires review.

To assist industry stakeholders gain an understanding of state and regional estimated supply, the last 5 years actual total tonnes crushed at the state level and each region has been averaged. A range is then provided using the highest and lowest figures from the actual tonnes crushed.

The estimated committed intake is the amount of fruit that wineries are already committed to take in, for 2015. 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 cont.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2014 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 2014 and include all plantings from the 2013 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 2013 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 zero (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 Plains

Vintage overview

Overview of vintage statistics

This information is related specifically to Primo Estate Vineyards and may not reflect conditions throughout the region.

August and September average temperatures were slightly higher than normal. Budburst commenced as per average and continued through to flowering at a normal rate.

Due to a wetter winter, especially in August, there was higher than normal snail activity seen in the vineyards. Snail damage was seen early on young shoots, but was brought under control very quickly. Minimal long term damage was reported.

October and November were significantly drier than the average. Flowering progressed normally and due to the dry weather, very low disease pressure was experienced. Irrigation commenced early in the season to compensate for the dry October and November.

December received average rainfall and the vines were looking relatively healthy and balanced in the lead up to Christmas.

January was hot and dry with irrigation being applied at a large rate to compensate. Burning of largely exposed fruit was experienced especially on blocks that were experiencing salinity and salt related problems.

Due to a warmer and considerably drier growing season disease pressure remained very low.

The warm January temperatures brought forward the commencement of harvest. Primo Estate picked its first block on 31st January. Harvesting continued at a relatively fast rate through the first two weeks of February where temperatures remained high.

On the 14th & 15th February, 90mm of rain fell in 48 hours as well as a considerable drop in temperature. Ripening slowed down considerably from this point onwards. We inspected the vineyards regularly and thoroughly after the rain event to monitor any disease outbreaks. We did not notice or record any problems.

The cooler conditions experienced meant that ripening slowed down and the vintage period was extended.

Vintage in the Adelaide Plains finished on the 25th March for Primo Estate. In terms of total production, white varieties were slightly lower than average, but red varieties were higher.

2014 wine quality is high. Aromatics are intense in all varieties, with elegant and fine flavour profiles.

*Daniel Zuzolo
Primo Estate Wines*

Overview of vintage statistics

The harvest from the Adelaide Plains was 4,360 tonnes in 2014, up by 490 tonnes (12.7%) on the 2013 harvest of 3,870 tonnes. There was an estimated non-response rate of 5% across the region. The total value of grapes increased from \$3.0 million to \$3.2 million. The average purchase value for the major varieties decreased slightly. Of the red varieties - Shiraz is down by \$50 per tonne to \$797 per tonne. Of the white varieties – Sauvignon Blanc is down by \$53 per tonne to \$681 per tonne and Chardonnay is down by \$59 per tonne to \$603 per tonne.

There were minimal new plantings (including top-working and replacements) recorded in the Adelaide Plains region in spring 2013, of which Shiraz accounted for most of the new plantings. The total planted area of vines decreased by 2.5% - from 662 hectares to 646 hectares.

Over the last 5 years, the average Adelaide Plains production was 4,406 tonnes, with a low of 3,720 tonnes in 2009 and a high of 5,204 tonnes in 2011. The 2014 crush is down by 1.1% against the last 5 year average. For 2015, the estimated committed intake is 4,654 tonnes.

Adelaide Plains

Winegrape intake summary - vintage 2014

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								
Cabernet Sauvignon	362	\$500	\$1,950	\$280,027	\$774	62	424	\$328,310
Grenache	59			\$24,008	\$410	12	71	\$28,968
Malbec	9			\$7,360	\$797	0	9	\$7,360
Mataro	75	\$1,100	\$1,500	\$104,478	\$1,385	0	75	\$104,478
Merlot	348	\$580	\$800	\$223,516	\$642	200	548	\$351,868
Other red	2			\$3,555	\$1,600	44	46	\$57,852
Pinot Noir	84			\$40,684	\$482	92	176	\$85,042
Shiraz	1,661	\$500	\$1,500	\$1,323,946	\$797	256	1,917	\$1,527,828
Tempranillo	14			\$19,035	\$1,352	0	14	\$19,035
Zinfandel	24			\$12,720	\$530	0	24	\$12,720
Total Red winegrapes	2,639			\$2,039,329		667	3,305	\$2,523,461
WHITE								
Chardonnay	371			\$223,341	\$603	0	371	\$223,341
Colombard	32			\$22,330	\$700	88	120	\$84,210
Muscat Gordo Blanco	9			\$5,472	\$600	0	9	\$5,472
Pinot Gris	219			\$201,877	\$923	1	220	\$202,800
Sauvignon Blanc	295			\$200,758	\$681	0	295	\$200,758
Semillon	40			\$21,359	\$530	0	40	\$21,359
Total White winegrapes	966			\$675,136		89	1,055	\$737,939
Grand Total All winegrapes	3,604			\$2,714,466		756	4,360	\$3,261,400

¹ Lowest and highest prices are only reported when there are at least three purchasers. Very low or high 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 Plains is 5%.

Adelaide Plains

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2013
	Pre-2011	2011	2012	2013		
Red winegrapes						
Cabernet Sauvignon	60	0	0	0	60	0%
Grenache	34	0	0	0	34	0%
Malbec	6	0	0	0	6	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	44	0	0	0	44	0%
Other Red	11	0	0	0	11	0%
Pinot Noir	18	0	0	0	18	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	221	0	0	1	222	0%
Tempranillo	2	0	0	0	2	0%
Zinfandel	2	0	0	0	2	0%
Total red varieties	413	0	0	1	414	0%
White winegrapes						
Chardonnay	66	0	0	0	66	0%
Chenin Blanc	5	0	0	0	5	0%
Colombard	9	0	0	0	9	0%
Other White	21	0	0	1	22	5%
Pinot Gris	26	0	0	0	26	0%
Riesling	13	0	0	0	13	0%
Sauvignon Blanc	54	0	0	0	54	0%
Semillon	8	0	0	0	8	0%
Total white varieties	201	0	0	1	202	1%
Unknown variety	30	0	0	0	30	0%
Total all varieties	644	0	0	2	646	0%