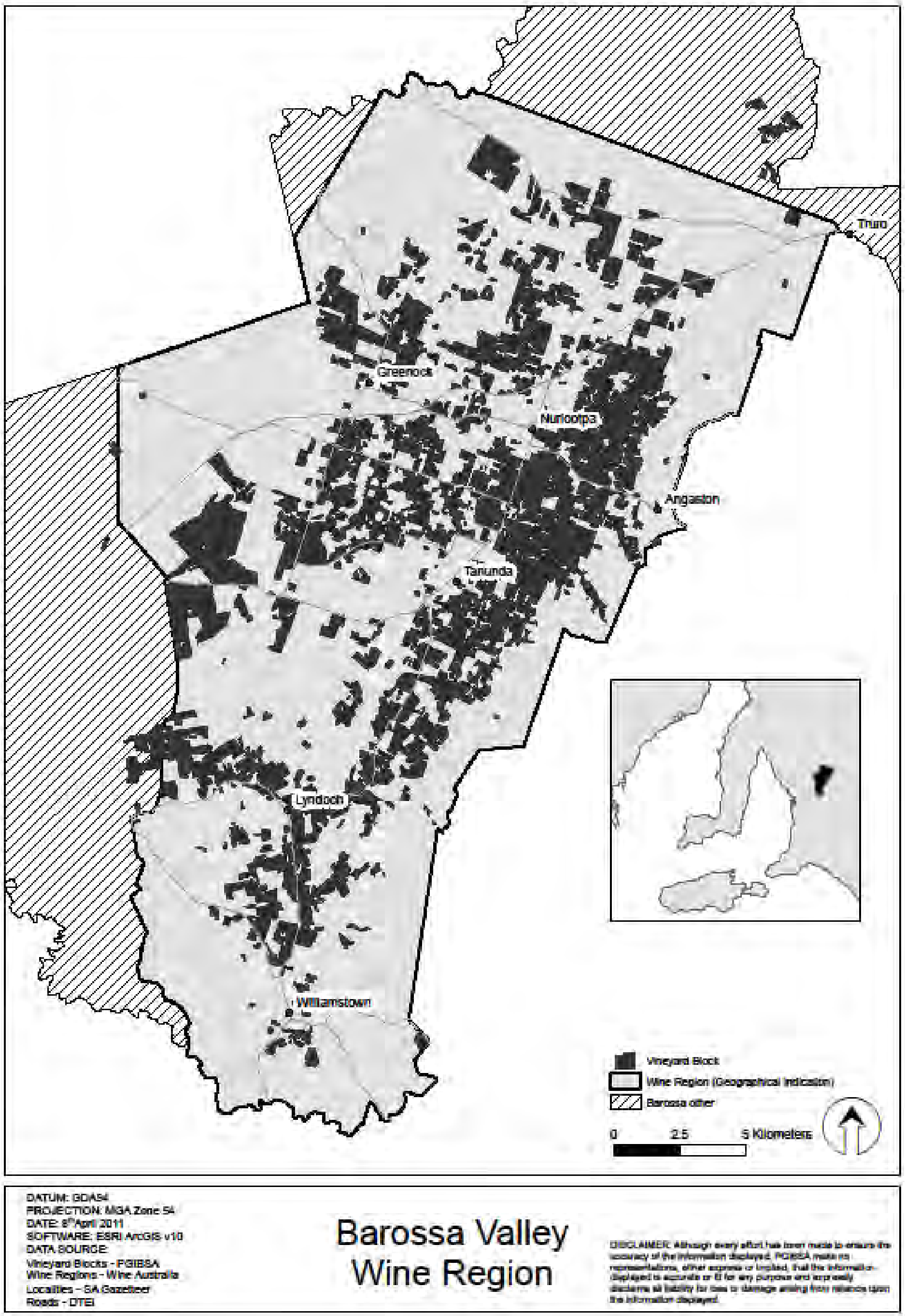


Barossa Valley Wine Region

Incorporating Barossa Zone - other

Regional summary report

2011

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 receival – 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.

Barossa Valley

Vintage overview

Vintage report

The cooler than average temperatures in the Barossa during September and October, delayed the onset of bud-burst until late October. Adequate moisture retained in the soil profiles from spring rainfall encouraged early healthy shoot growth. Scattered rainfall and cool conditions during November meant the period of shoot development was prolonged and flowering did not occur until later in the month. Most varieties produced even set and generally small bunch sizes.

Humid and wet conditions in the middle of November were conducive to downy mildew, and subsequent rainfall promoted secondary infection in some vineyards. This had negligible impact on those vineyards with stringent preventative strategies.

There was five times more the average rainfall in December, with totals exceeding over 130mm across the Barossa. This resulted in larger than normal canopies, warranting regular trimming and hedging to encourage sunlight penetration on bunches, and increased airflow to reduce disease risk.

Berry development was delayed, and by Christmas most varieties showed pea-sized berries. It was not until mid-to-late January that white berries started to soften and early maturing reds started to colour. A few warm days towards the end of January sped up ripening and all varieties were well into veraison.

Humid and warm conditions in late January and early February promoted Powdery Mildew expression in some vineyards, especially in white varieties such as Chardonnay and Riesling. The extent of damage was influenced by rigorous preventative regimes.

Rain events in February occurred almost every week for the entire month, leading to slightly bigger berries and overall, fuller bunches. Thin skinned varieties such as Viognier and Shiraz were particularly susceptible to rot infection during this period. Late applications of iprodione reduced further infection.

The western and southern parts of the Valley tended to ripen quicker than the central region of the Barossa. Small parcels of fruit were picked in February but the bulk of harvest commenced in March. Crop levels across all varieties were average to high; however selective harvesting of clean fruit impacted the potential of a large regional crush.

Continued mild temperatures in March (the average maximum was 22.5C – 3.2C lower than the long term average) led to even ripening and good flavour development in vineyards across the region. Varietal expression was predominant particularly in Sauvignon Blanc and Semillon. A heavy rain event occurred on 20 March with the northern parts of the Valley experiencing more than 100mm in just two hours. Fortunately the rain was an isolated issue, with other parts only receiving 5mm; and a large proportion of the fruit picked across the region thereafter, was exceptional quality.

Standout varieties this year include Riesling, Chardonnay, Cabernet Sauvignon, Shiraz and Mataro.

Elise Heyes, Viticultural Development – Barossa Grape & Wine Assoc.
Louisa Rose, Senior Winemaker – Yalumba Wine Company

Overview of vintage statistics

The harvest from the Barossa Valley (including Barossa zone – other) was 63,367 tonnes in 2011, up by 2,500 tonnes (4.2%) more than the 2010 harvest. The total value of grapes from the region was $61.9 million compared to $67 million in 2010. The average purchase values in all the major varieties decreased for the third year in a row. Shiraz fell a further $138 per tonne and Chardonnay a further $32 per tonne to a new record low of $479 per tonne. Cabernet Sauvignon fell a further $71 per tonne.

New plantings in the Barossa Valley in spring 2010 (including top-working and replacements) were 144 hectares – with 66% Shiraz and 11% Cabernet Sauvignon. The total planted area of vines in the region decreased by 450 hectares (4%).

The estimated production from the Barossa Valley for 2012 is 71,700 tonnes. The wineries' committed intake is 63,200 tonnes, leaving only 8,500 tonnes or 12% uncontracted.

In 2016, the estimated production is expected to be similar at 72,900 tonnes, of which 64.5% (47,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 25,900 tonnes to be sold on the open market or signed up in the intervening period.

Winegrape intake summary - vintage 2011

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	0			$0	$0	3	3	$3,040
Cabernet Franc	157	$500	$1,800	$134,390	$855	59	216	$184,880
Cabernet Sauvignon	6,745	$300	$5,236	$6,653,118	$986	2,633	9,378	$9,250,630
Carignan	30	$1,000	$1,500	$38,467	$1,290	0	30	$38,983
Grenache	2,955	$200	$3,500	$2,719,255	$920	697	3,652	$3,360,614
Malbec	42	$500	$1,200	$43,324	$1,022	44	86	$88,027
Mataro	550	$600	$3,000	$785,190	$1,428	430	980	$1,398,828
Merlot	2,785	$400	$1,500	$2,045,047	$734	788	3,572	$2,623,417
Nebbiolo	0			$0	$0	22	22	$24,324
Other Red	253	$500	$1,800	$260,301	$1,030	25	278	$286,565
Petit Verdot	114	$600	$2,000	$97,811	$857	20	134	$115,076
Pinot Noir	200	$500	$820	$121,008	$604	72	272	$164,195
Sangiovese	215	$300	$1,500	$257,407	$1,200	37	252	$302,191
Shiraz	22,434	$300	$12,816	$27,210,659	$1,213	5,963	28,396	$34,442,822
Tempranillo	302	$600	$1,900	$459,114	$1,519	116	418	$634,993
Touriga	33			$43,470	$1,305	13	46	$60,231
Zinfandel	30	$1,100	$1,800	$36,420	$1,231	22	52	$64,108
Total Red winegrapes	**36,844**			**$40,904,980**		**10,944**	**47,788**	**$53,042,926**

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 Barossa Valley is 4.6%.

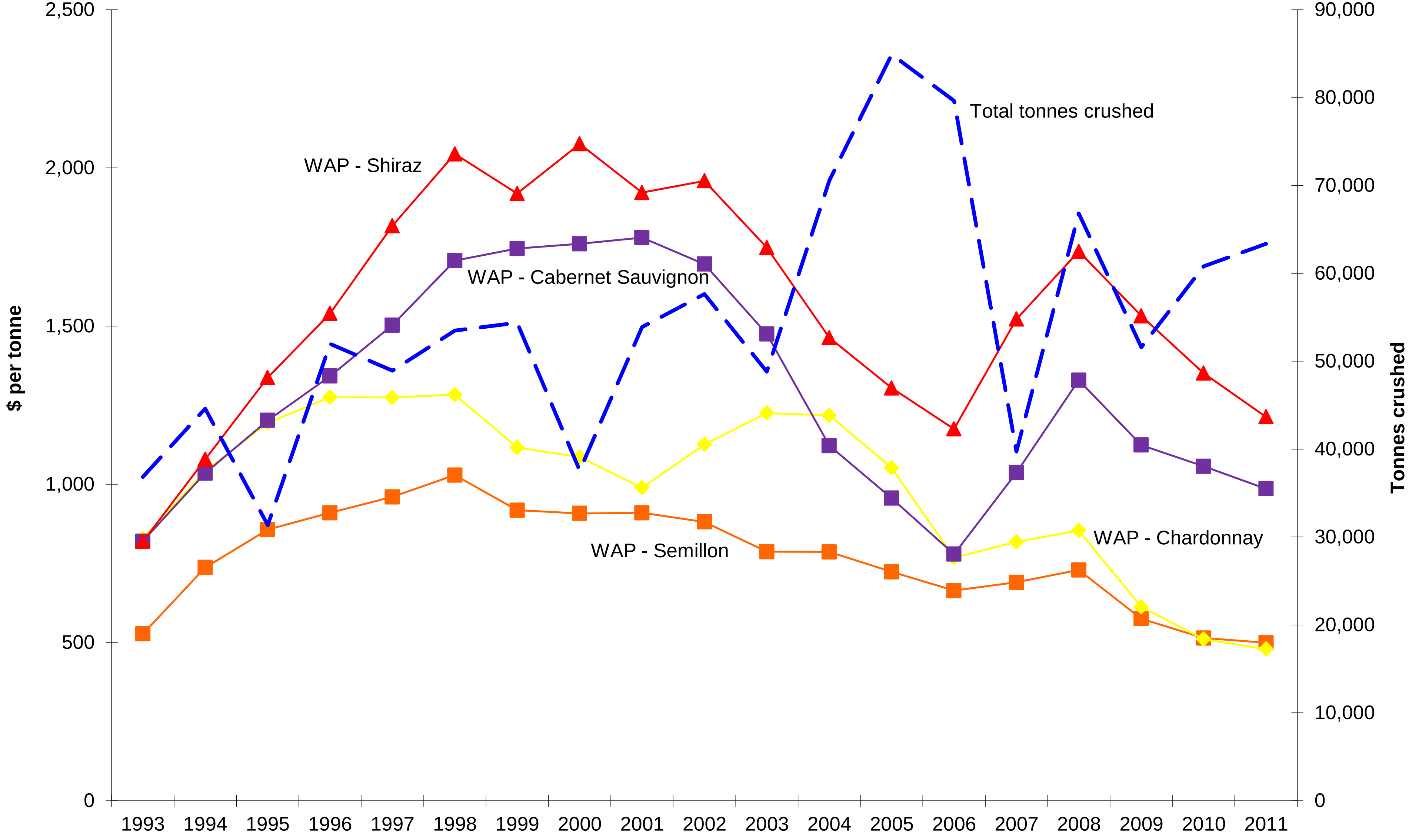
Barossa Valley   Winegrape intake summary - vintage 2011

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
WHITE								
Chardonnay	3,473	$200	$900	$1,663,026	$479	1,714	5,187	$2,483,541
Chenin Blanc	122	$300	$1,000	$46,934	$386	6	128	$49,404
Doradillo	0			$0	$0	3	3	$1,685
Marsanne	8	$1,200	$2,000	$13,100	$1,747	59	67	$117,020
Muscadelle	22	$700	$900	$16,680	$751	0	22	$16,680
Muscat a Petit Grains Blanc	110	$525	$1,200	$96,833	$882	92	202	$178,269
Muscat Gordo Blanco	32			$30,115	$950	30	62	$58,615
Other White	228	$550	$1,000	$152,431	$670	34	262	$175,467
Palomino	4			$3,088	$772	15	19	$14,668
Pedro Ximenes	0			$0	$0	14	14	$7,863
Pinot Gris	52	$800	$1,550	$60,919	$1,176	8	59	$69,743
Riesling	1,531	$300	$1,800	$952,589	$622	1,609	3,141	$1,953,658
Roussanne	14	$500	$1,400	$16,534	$1,181	35	49	$58,247
Sauvignon Blanc	929	$394	$1,400	$773,278	$832	130	1,059	$881,469
Semillon	3,985	$150	$1,500	$1,987,088	$499	780	4,765	$2,376,127
Traminer	62			$47,524	$761	0	62	$47,524
Trebbiano	5			$6,223	$1,197	0	5	$6,223
Verdelho	18			$8,910	$501	0	18	$8,910
Viognier	335	$300	$2,000	$262,916	$785	120	455	$357,069
Total White winegrapes	**10,928**			**$6,138,187**		**4,650**	**15,579**	**$8,862,182**
Total All winegrapes	**47,773**			**$47,043,167**		**15,594**	**63,367**	**$61,905,108**

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 Barossa Valley is 4.6%.

Barossa Valley **Historical Weighted Average Price vs tonnes crushed**



Barossa Valley

Current plantings by variety and year planted

Current area in hectares*

Variety	Pre-2008	2008	2009	2010	Total area	% planted in 2010
Red winegrapes						
Cabernet Franc	33	0	0	1	33	3%
Cabernet Sauvignon	1,402	21	9	16	1,402	1%
Durif (Petite Sirah)	15	4	0	1	20	5%
Grenache	706	3	3	3	714	0%
Malbec	21	0	0	0	21	0%
Mataro (Mourvedre)	194	11	5	10	220	5%
Merlot	390	0	1	0	390	0%
Other red	59	7	7	4	77	5%
Petit Verdot	27	0	0	0	27	0%
Pinot Noir	52	0	0	0	52	0%
Sangiovese	22	0	0	3	25	12%
Shiraz	5,825	190	78	95	5,825	2%
Tempranillo	50	5	18	8	81	10%
Zinfandel	14	0	0	0	14	0%
Total red varieties	**8,808**	**240**	**123**	**140**	**8,901**	**2%**
White winegrapes						
Chardonnay	579	2	4	1	586	0%
Chenin Blanc	25	1	0	0	26	0%
Marsanne	7	2	0	0	10	0%
Muscadelle (Tokay)	18	0	0	0	18	0%
Muscat A Petit Grains Blanc	42	5	10	0	56	0%
Other white	46	2	2	4	56	7%
Pedro Ximenes	10	0	0	0	11	0%
Pinot Gris	5	0	3	0	8	0%
Riesling	312	0	1	0	314	0%
Sauvignon Blanc	109	9	5	0	123	0%
Savagnin Blanc	7	5	0	0	12	0%
Semillon	534	0	0	0	534	0%
Vermentino	0	0	3	0	4	0%
Viognier	82	4	0	0	86	0%
Total white varieties	**1,777**	**30**	**28**	**4**	**1,842**	**0%**
Unknown variety	20	0	0	0	21	0%
Total all varieties	**10,605**	**271**	**152**	**144**	**10,763**	**1%**

**Includes plantings in Barossa Zone - other (229 hectares)*

Barossa Valley   Estimated supply and committed intake 2012 - 2016

	2012				2014				2016			
	Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]		
Variety		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*
Red winegrapes												
Barbera	21	0	10	10	22	0	10	10	22	0	10	10
Cabernet Franc	261	66	141	207	263	66	109	175	263	66	109	175
Cabernet Sauvignon	7,108	2,634	5,372	8,006	7,188	2,632	4,325	6,957	7,188	2,632	3,347	5,978
Carignan	0	1	29	30	0	1	29	30	0	1	29	30
Grenache	4,254	795	3,087	3,882	4,270	837	2,205	3,042	4,270	840	1,815	2,655
Malbec	123	51	101	152	123	51	77	128	123	51	77	128
Mataro	1,226	460	736	1,196	1,282	476	560	1,036	1,282	480	545	1,025
Merlot	2,343	747	2,473	3,220	2,346	758	1,577	2,335	2,346	758	1,492	2,250
Nebbiolo	53	31	0	31	54	31	0	31	54	31	0	31
Other Red	559	27	254	281	601	109	232	341	601	109	234	343
Petit Verdot	165	24	153	177	165	24	100	124	165	24	100	124
Pinot Noir	464	73	205	278	464	73	129	202	464	73	121	194
Sangiovese	174	40	144	184	185	42	165	207	185	42	165	207
Shiraz	35,983	8,275	23,462	31,738	36,703	8,922	16,648	25,570	36,703	9,464	13,226	22,689
Tempranillo	500	116	403	520	574	168	398	566	574	251	398	649
Touriga	0	28	28	57	0	48	28	77	0	48	28	77
Zinfandel	111	40	7	47	111	40	7	47	111	40	7	47
Total red winegrapes	**46,060**	**18,631**	**17,354**	**35,985**	**54,351**	**14,279**	**26,600**	**40,878**	**54,351**	**14,910**	**21,703**	**36,613**

[1] *Supply forecast produced by PGIBSA based on the South Australian vineyard register*
[2] *A raising factor of 1.05 has been applied to committed intake to allow for non-respondents*

Barossa Valley Estimated supply and committed intake 2012 - 2016

	2012				2014				2016			
	Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]		
Variety		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*
White winegrapes												
Chardonnay	5,241	1,628	3,036	4,664	5,257	1,658	2,301	3,959	5,257	1,671	1,943	3,614
Chenin Blanc	336	6	210	216	338	6	123	129	338	6	123	129
Marsanne	71	73	6	80	77	73	6	80	77	73	6	80
Muscadelle	0	5	27	33	0	5	17	22	0	5	17	22
Muscat a Petit Grains Blanc	401	3	52	55	427	3	52	55	427	3	52	55
Muscat Gordo Blanco	0	31	42	73	0	31	42	73	0	31	42	73
Other White	513	36	275	310	559	82	280	362	559	82	280	362
Palomino	125	16	4	20	125	16	4	20	125	16	4	20
Pedro Ximenes	83	16	0	16	84	16	0	16	84	16	0	16
Pinot Gris	51	23	69	92	56	63	45	108	56	63	45	108
Riesling	2,817	941	1,385	2,326	2,819	941	1,196	2,136	2,819	945	988	1,933
Roussanne	0	43	17	60	0	43	17	60	0	43	17	60
Sauvignon Blanc	1,645	135	1,047	1,182	1,696	93	943	1,036	1,696	93	928	1,021
Semillon	6,413	382	2,965	3,346	6,413	305	2,167	2,472	6,413	394	1,951	2,345
Traminer	0	0	74	74	0	0	51	51	0	0	51	51
Trebbiano	0	0	5	5	0	0	5	5	0	0	5	5
Viognier	677	111	580	691	686	121	431	551	686	121	425	546
Total white winegrapes	**18,374**	**3,450**	**9,794**	**13,244**	**18,539**	**3,457**	**7,679**	**11,136**	**18,539**	**3,563**	**6,878**	**10,441**
All winegrapes	**71,718**	**16,860**	**46,399**	**63,260**	**72,890**	**17,736**	**34,278**	**52,014**	**72,890**	**18,473**	**28,580**	**47,054**

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

[2] *A raising factor of 1.05 has been applied to committed intake to allow for non-respondents*