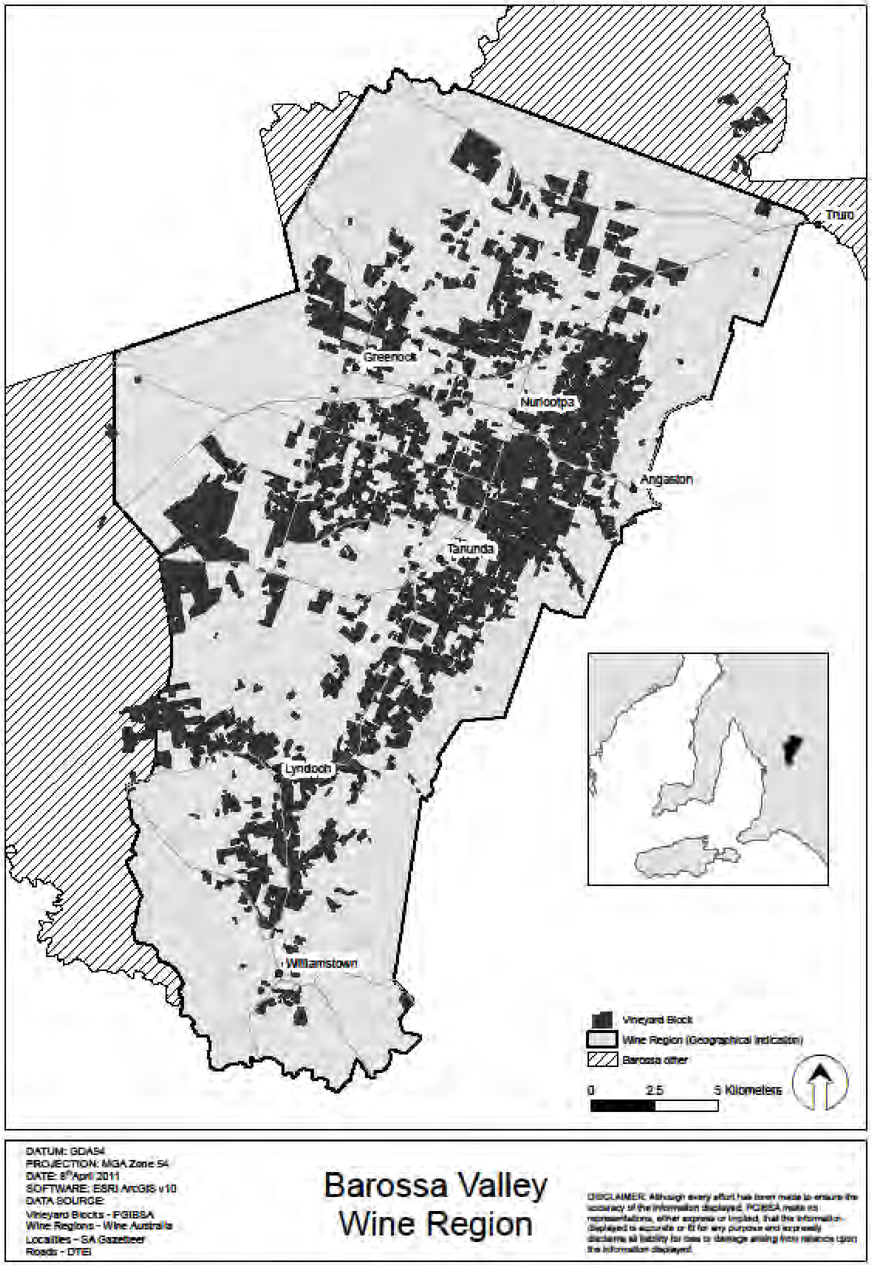


Barossa Valley Wine Region

Incorporating Barossa Zone - other

Regional summary report

2012

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 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.

Barossa Valley

Vintage overview

Vintage report

Ideal weather conditions were experienced in the lead up to the 2012 vintage. Mean minimum temperatures in August were 2.5°C above average leading to early budburst (ie. budburst for Shiraz was recorded in late August).

In September, below average mean minimum temperatures slowed bud development, leading to mite damage in Shiraz and Cabernet Sauvignon. Below average maximum temperatures in spring and early summer (albeit average to below average rainfall) were conducive to healthy canopy growth and good flavour development. Overall, there was a cool start to the season, followed by a cool January. The exception was a burst of warm weather around New Year which coincided with the start of veraison, resulting in some burning of Pinot Noir, Frontignac and Riesling.

Warmer weather followed late January which, whilst ripening the fruit beautifully, also led to much weight loss and therefore contributed to the already lower yields in most varieties. Bunches were very small and there were fewer berries per bunch due to the cool overcast conditions during fruit initiation, particularly in Cabernet Sauvignon.

The cool overcast conditions in spring and early summer led to some Powdery Mildew. Similarly, rain in early October led to early primary infections of Downy Mildew. However, these were not significant and the heat at New Year, along with vigilant spray regimes, helped eradicate this.

A rain event at the end of January freshened up the canopy, and there was evidence of minor splitting, however this healed up quickly with the warmer weather.

In the Barossa Valley, the majority of whites had been picked by late February. Overall, the quality of whites was very good, however white yields were average to well below average (down 10-30%), particularly Chardonnay.

Early red varieties started to come off in the first week of February (a month earlier than 2011), with the majority of Shiraz harvested by late March. A second rain event at the end of February pushed back Baumés and slowed down the harvest (which, up until this point, had been progressing very rapidly). Only slight splitting occurred, and again healed up with the subsequent warm weather. The later varieties such as Mataro were harvested well into April.

Cool conditions helped along by low crops, led to great varietal expression in whites and reds - with reds exuding brilliant colour.

Overall, the quality of reds was exceptional. Shiraz yields were lower than average by around 25%, with Grenache yields down around 10%. Cabernet Sauvignon yields were well below average (down 20-40%).

Nigel Blieschke, Chairman, Barossa Viticulture Technical Group
Prue Henschke, Viticulturalist, CA Henschke & Co
Louisa Rose, Chief Winemaker, Yalumba Wine Company
Nicki Robins, Viticultural Development Officer, Barossa Grape & Wine Association

Overview of vintage statistics

The harvest from the Barossa Valley (including Barossa zone – other) was 51,897 tonnes in 2012, down by 11,470 tonnes (18%) than the 2011 harvest. The total value of grapes from the region was $64.4 million compared to $61.9 million in 2011. The average purchase values in all the major varieties increased. Of the red varieties - Shiraz up by $320 per tonne to $1,533 per tonne and Cabernet Sauvignon up by $190 per tonne to $1,176 per tonne. Whilst of the white varieties, Chardonnay increased by $15 per tonne to $595 per tonne.

There were 74 hectares of new plantings in the Barossa Valley in spring 2011 (including top-working and replacements) – with 40.5% Shiraz and 10.8% Cabernet Sauvignon. The total planted area of vines in the region increased by 595 hectares (5.5%) compared with a decrease of vines by 450 hectares in 2011.

The estimated production from the Barossa Valley for 2013 is 73,220 tonnes. The wineries' committed intake is 63,200 tonnes, leaving 15,200 tonnes (20.7%) uncontracted.

In 2017, the estimated production is expected to be similar at 74,000 tonnes, of which 34% (44,500 tonnes) is already under contract or winery grown fruit. This leaves an estimated 29,500 tonnes to be sold on the open market or signed up in the intervening period.

Barossa Valley

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	0			$0	$0	4	4	$5,578
Cabernet Franc	131	$650	$2,000	$124,042	$949	41	172	$162,975
Cabernet Sauvignon	4,338	$250	$5,730	$5,100,240	$1,176	1,546	5,884	$6,917,866
Carignan	13			$15,097	$1,190	0	13	$15,454
Grenache	2,852	$250	$8,000	$3,647,526	$1,279	795	3,646	$4,663,862
Malbec	84	$900	$2,000	$96,604	$1,146	41	125	$143,440
Mataro	624	$650	$8,000	$915,749	$1,468	408	1,032	$1,515,288
Merlot	2,088	$300	$1,800	$1,689,073	$809	603	2,691	$2,176,784
Muscat a Petit Grains Rouge	0			$0	$0	5	5	$6,414
Nebbiolo	0			$0	$0	25	25	$35,501
Other Red	266	$800	$2,000	$277,801	$1,044	36	302	$315,742
Petit Verdot	93	$650	$1,850	$86,649	$933	24	117	$108,984
Pinot Noir	240	$350	$1,200	$174,033	$725	56	296	$214,827
Sangiovese	148	$500	$2,700	$215,817	$1,456	46	195	$283,352
Shiraz	19,351	$170	$13,553	$29,670,011	$1,533	7,315	26,666	$40,885,635
Tempranillo	191	$1,000	$1,900	$292,130	$1,533	69	259	$397,375
Touriga	30			$43,032	$1,459	27	57	$82,446
Zinfandel	58	$1,000	$1,800	$69,758	$1,203	33	91	$109,611
Total Red winegrapes	**30,505**			**$42,417,563**		**11,075**	**41,580**	**$58,041,134**

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 4.1%.

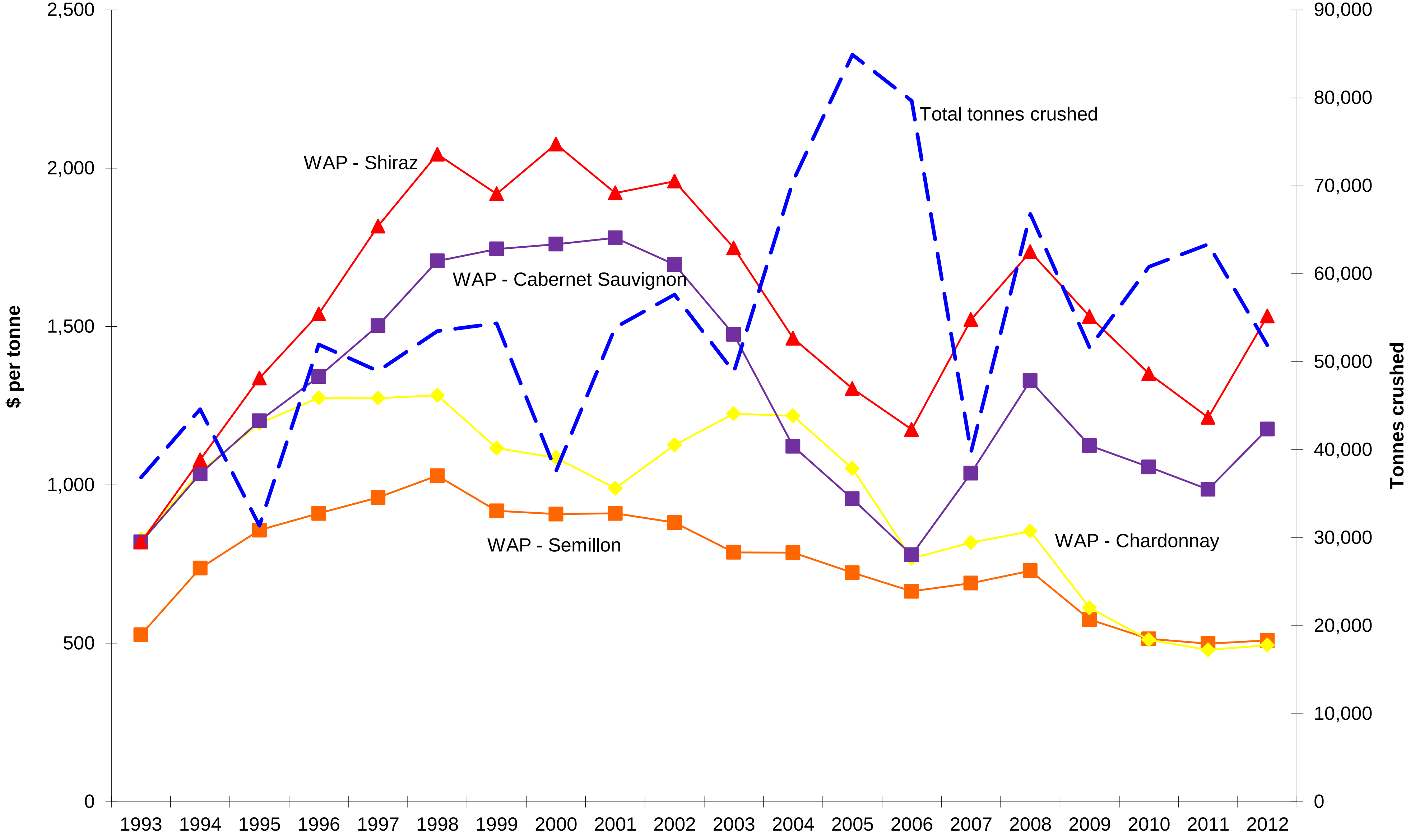
Winegrape intake summary - vintage 2012

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
WHITE								
Chardonnay	1,984	$290	$900	$979,881	$494	1,172	3,156	$1,558,658
Chenin Blanc	100	$250	$1,200	$42,200	$421	2	102	$42,886
Colombard	0			$0	$0	8	8	$4,869
Marsanne	19	$1,000	$2,000	$24,585	$1,295	50	69	$89,057
Muscadelle	1			$765	$900	5	6	$5,220
Muscat a Petit Grains Blanc	105	$500	$1,200	$95,606	$906	153	258	$233,916
Muscat Gordo Blanco	45			$41,625	$925	10	55	$50,653
Other White	84			$78,041	$929	17	101	$94,179
Palomino	8			$6,400	$800	179	187	$149,792
Pedro Ximenes	18			$13,410	$744	15	33	$24,492
Pinot Gris	9			$9,650	$1,135	41	49	$55,720
Riesling	1,039	$250	$1,800	$686,696	$661	923	1,961	$1,296,678
Roussanne	21	$1,000	$1,400	$25,781	$1,231	34	55	$67,634
Sauvignon Blanc	665	$300	$1,400	$575,636	$865	68	733	$634,106
Semillon	2,438	$250	$1,000	$1,240,398	$509	520	2,957	$1,504,763
Traminer	17			$13,600	$800	0	17	$13,600
Viognier	476	$150	$2,250	$443,907	$932	93	569	$530,524
Total White winegrapes	**7,030**			**$4,278,180**		**3,288**	**10,317**	**$6,356,746**
Total All winegrapes	**37,535**			**$46,695,743**		**14,362**	**51,897**	**$64,397,880**

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 4.1%.

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



Current plantings by variety and year planted

*Includes plantings in Barossa Zone - other (234 hectares)

Variety	Pre-2009	2009	2010	2011	Total area	% planted in 2011
	Current area in hectares*					
Red winegrapes						
Cabernet Franc	32	0	1	2	34	5%
Cabernet Sauvignon	1,429	9	16	8	1,462	1%
Durif (Petite Sirah)	18	0	1	0	19	0%
Grenache	700	3	7	7	717	1%
Malbec	20	0	0	0	20	2%
Mataro (Mourvedre)	206	5	13	3	228	1%
Merlot	393	1	0	0	395	0%
Other red	65	8	5	5	84	6%
Petit Verdot	23	0	0	0	23	0%
Pinot Noir	48	0	0	0	48	0%
Sangiovese	22	0	3	0	25	0%
Shiraz	6,088	94	107	30	6,320	0%
Tempranillo	58	18	8	5	90	6%
Zinfandel	14	0	0	0	14	1%
Total red varieties	**9,117**	**140**	**161**	**62**	**9,479**	**1%**
White winegrapes						
Chardonnay	549	4	1	0	554	0%
Chenin Blanc	26	0	0	0	26	0%
Marsanne	9	0	0	0	10	0%
Muscadelle (Tokay)	17	0	0	0	17	0%
Muscat A Petit Grains Blanc	46	10	0	1	57	2%
Other white	51	2	2	10	65	15%
Pedro Ximenes	11	0	0	0	11	0%
Pinot Gris	5	3	0	1	9	12%
Riesling	296	1	0	0	297	0%
Sauvignon Blanc	110	5	0	0	115	0%
Savagnin Blanc	8	0	0	0	8	0%
Semillon	515	0	1	0	516	0%
Vermentino	0	3	0	0	4	0%
Viognier	83	0	0	1	84	1%
Total white varieties	**1,728**	**28**	**4**	**13**	**1,772**	**1%**
Unknown variety	106	0	0	0	106	0%
Total all varieties	**10,950**	**169**	**165**	**74**	**11,358**	**1%**

Estimated supply and committed intake 2013 - 2017

	2013				2015				2017			
	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	22	6	0	6	22	6	0	6	22	6	0	6
Cabernet Franc	259	50	121	170	267	60	110	170	267	60	110	170
Cabernet Sauvignon	7,216	2,305	4,628	6,933	7,267	2,413	3,557	5,971	7,267	2,455	3,088	5,543
Carignan	0	1	13	14	0	1	13	14	0	1	13	14
Grenache	4,234	980	2,756	3,735	4,268	1,030	2,026	3,057	4,268	1,056	1,943	2,999
Malbec	119	58	117	174	120	66	72	138	120	66	72	138
Mataro	1,302	446	496	942	1,336	477	473	950	1,336	466	429	895
Merlot	2,365	698	2,096	2,794	2,367	725	1,932	2,657	2,367	722	1,583	2,305
Muscat a Petit Grains Rouge / Rose	0	5	0	5	0	5	0	5	0	5	0	5
Nebbiolo	54	36	0	36	56	38	0	38	56	46	0	46
Other Red	794	67	237	304	831	111	245	357	831	113	245	359
Petit Verdot	141	23	89	111	141	23	89	111	141	24	11	35
Pinot Noir	432	0	113	113	432	0	105	105	432	0	64	64
Sangiovese	185	43	140	184	190	55	196	251	190	55	196	251
Shiraz	37,247	9,663	21,941	31,604	37,636	10,248	14,903	25,151	37,636	10,567	12,304	22,871
Tempranillo	600	122	367	489	679	289	241	530	679	289	241	530
Touriga	0	47	28	75	0	56	28	84	0	56	28	84
Zinfandel	111	28	34	62	111	28	34	62	111	28	34	62
Total red winegrapes	**55,079**	**14,578**	**33,175**	**47,752**	**55,721**	**15,630**	**24,026**	**39,657**	**55,721**	**16,013**	**20,363**	**36,376**

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

[2] *A raising factor of 1.031 has been applied to committed intake to allow for non-respondents*

Barossa Valley **Estimated supply and committed intake 2013 - 2017**

	2013				2015				2017			
	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	4,972	1,428	2,255	3,683	4,983	1,418	1,574	2,992	4,983	1,421	1,477	2,898
Chenin Blanc	338	5	35	40	338	5	35	40	338	5	35	40
Colombard	0	0	0	0	0	0	0	0	0	0	0	0
Marsanne	77	57	19	75	78	57	20	76	78	57	20	76
Muscadelle	0	5	2	7	0	12	2	14	0	15	2	18
Muscat a Petit Grains Blanc	421	210	42	253	448	231	42	273	448	262	42	304
Muscat Gordo Blanco	0	10	46	57	0	10	46	57	0	10	46	57
Other White	950	41	85	126	1,008	77	95	172	1,008	77	95	172
Palomino	125	191	8	199	125	191	8	199	125	191	8	199
Pedro Ximenes	84	21	7	28	84	22	12	34	84	22	12	34
Pinot Gris	56	41	10	52	67	72	10	83	67	103	10	113
Riesling	2,674	873	855	1,728	2,677	885	786	1,671	2,677	906	714	1,620
Roussanne	0	52	19	70	0	52	20	71	0	52	20	71
Sauvignon Blanc	1,589	110	949	1,059	1,610	110	752	862	1,610	110	557	667
Semillon	6,187	596	1,731	2,328	6,189	571	1,164	1,736	6,189	568	811	1,379
Traminer	0	0	0	0	0	0	0	0	0	0	0	0
Viognier	667	126	480	605	669	132	383	515	669	132	383	515
Total white winegrapes	**18,141**	**3,767**	**6,542**	**10,310**	**18,277**	**3,846**	**4,949**	**8,795**	**18,277**	**3,932**	**4,231**	**8,163**
All winegrapes	**73,220**	**18,345**	**39,717**	**58,062**	**73,999**	**19,476**	**28,975**	**48,451**	**73,999**	**19,945**	**24,594**	**44,540**

[1] *Supply forecast produced by PGIBSA based on the South Australian vineyard register*
[2] *A raising factor of 1.031 has been applied to committed intake to allow for non-respondents*