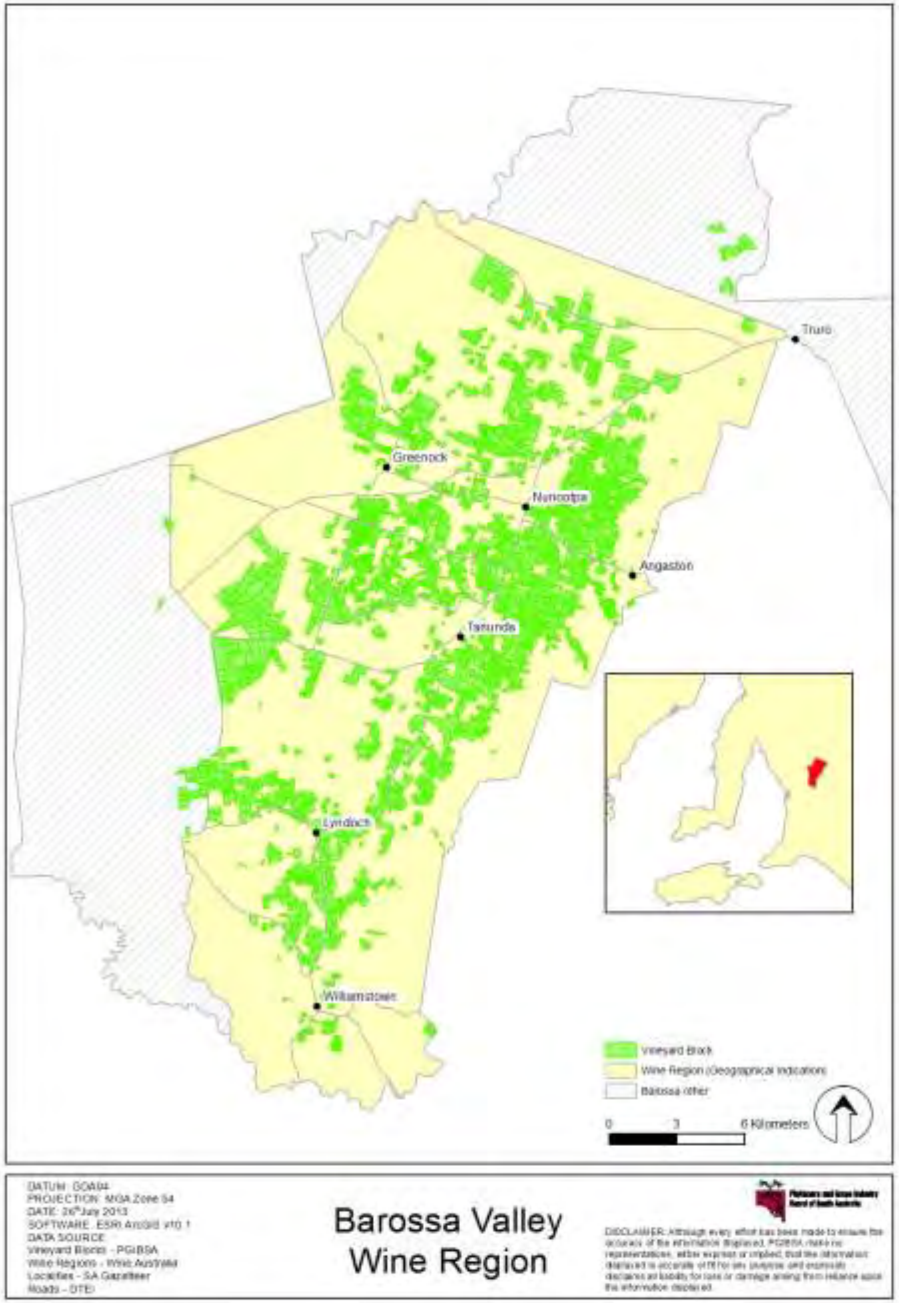


SA Winegrape Crush Survey

Regional Summary Report - 2014

Barossa Valley Wine Region

Incorporating
Barossa Zone - other

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 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.

Barossa Valley

Vintage overview

Vintage report

The 2014 Barossa vintage will go down as a testament to the ability of both grapes and people to thrive under challenge. Grape growers and viticulturists have done an amazing job looking after the vineyards, as Mother Nature threw a few curve balls. Even late in the season vines were green, fresh and healthy ripening the late varieties well into autumn.

In the Barossa Valley, really good winter and early spring rains filled the soils and set the vines up well for the season. July-Sept rainfall was 20% above average. A windy spring meant some varieties set unevenly with potentially poor yields, and then in November with vines full-growth and flowering underway, parts of the Barossa Valley experienced unseasonal frost events, resulting in almost complete loss of fruit for some vineyards.

Late spring and summer were dry and warm at least during the days, with significant heat records being set. September was over 2°C above both average minimum and maximum temperature and January's maximum temperature was 2° warmer than average. After an average September rainfall, October had only 56% and November 11% of average rainfall. Along with the dry, November had particularly cold nights (2°C lower than average) leading to the multiple frost events mentioned above.

By the last week of January, harvest on the Barossa Valley floor had started with white varieties, and the first week of February saw picking of the first reds, but on Valentine's Day the season changed and between 100 and 150 mm of rain fell in just over 24 hours. This and the following cool weather caused the rush of the early vintage to slow down and the rest of vintage progressed at an almost leisurely pace. No subsequent rain meant disease pressure was minimal.

The Barossa Valley experienced generally lower than average crops, but plenty of flavour and acid. Wind and frost caused poor fruit set in most Barossa vineyards and the hot and dry summer lead to smaller than average berry size.

At this early stage quality is looking very good. Reds are rich and varietal, with dense colours, and a line that suggests they will be very age worthy.

Louisa Rose, Chief Winemaker
Yalumba Wine Company

Overview of vintage statistics

The harvest from the Barossa Valley (including Barossa zone – other) was 44,336 tonnes in 2014, up slightly by 512 tonnes (1.2%) on the 2013 harvest of 43,824 tonnes. There was an estimated non-response rate of 4.8% across the region. The total value of grapes from the region was $66.2 million compared to $58.4 million in 2013. The average purchase values for all the major varieties increased. Of the red varieties, Shiraz was up by $130 per tonne to $1,849 per tonne and Cabernet Sauvignon up by $227 per tonne to $1,504 per tonne. Of the white varieties, Semillon rose slightly by $7 per tonne to $514 per tonne and Chardonnay increased by $22 per tonne to $535 per tonne.

There were 153 hectares of new plantings in the Barossa Valley in spring 2013 (including top-working and replacements) compared with 143 hectares planted in 2012. Of the new plantings, Shiraz accounted for 79.6% (121 hectares) and Cabernet Sauvignon 9.9% (15 hectares). The total planted area of vines in the region decreased by <1% (49 hectares).

Over the last 5 years, the average Barossa Valley production was 54,297 tonnes, with a low of 43,824 tonnes in 2013 and a high of 63,367 tonnes in 2011. The 2014 crush is down by 22.5% against the last 5 year average. For 2015, the estimated committed intake is 61,004 tonnes.

Barossa Valley   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 Franc	82	$750	$1,800	$89,750	$1,094	39	121	$131,978
Cabernet Sauvignon	3,015	$650	$5,730	$4,533,357	$1,504	2,188	5,203	$7,823,818
Carignan	6	$900	$2,000	$7,447	$1,201	0	7	$7,807
Grenache	2,257	$250	$8,000	$2,936,994	$1,301	1,071	3,328	$4,330,735
Malbec	53	$1,400	$1,900	$81,815	$1,530	18	72	$109,876
Mataro	428	$750	$8,000	$683,794	$1,597	326	754	$1,204,696
Merlot	1,327	$500	$1,800	$1,217,140	$917	640	1,967	$1,804,591
Muscat A Petit Grains Rose	4			$3,472	$800	0	4	$3,472
Nebbiolo	4			$4,589	$1,300	11	15	$18,889
Other red	257	$700	$2,700	$308,936	$1,203	83	340	$409,252
Petit Verdot	100	$980	$2,000	$120,220	$1,203	23	123	$147,956
Pinot Noir	178	$350	$900	$130,480	$734	0	178	$130,480
Sangiovese	177	$1,200	$2,700	$265,817	$1,498	38	216	$323,352
Shiraz	13,992	$750	$89,888	$25,869,634	$1,849	9,943	23,934	$44,253,126
Tempranillo	199	$1,200	$2,000	$315,940	$1,590	65	264	$420,079
Touriga	17			$26,184	$1,512	20	38	$57,115
Zinfandel	20	$1,100	$2,000	$32,028	$1,630	8	28	$45,146
Total Red winegrapes	**22,116**			**$36,627,597**		**14,476**	**36,591**	**$61,222,370**

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 Barossa Valley is 4.8%.

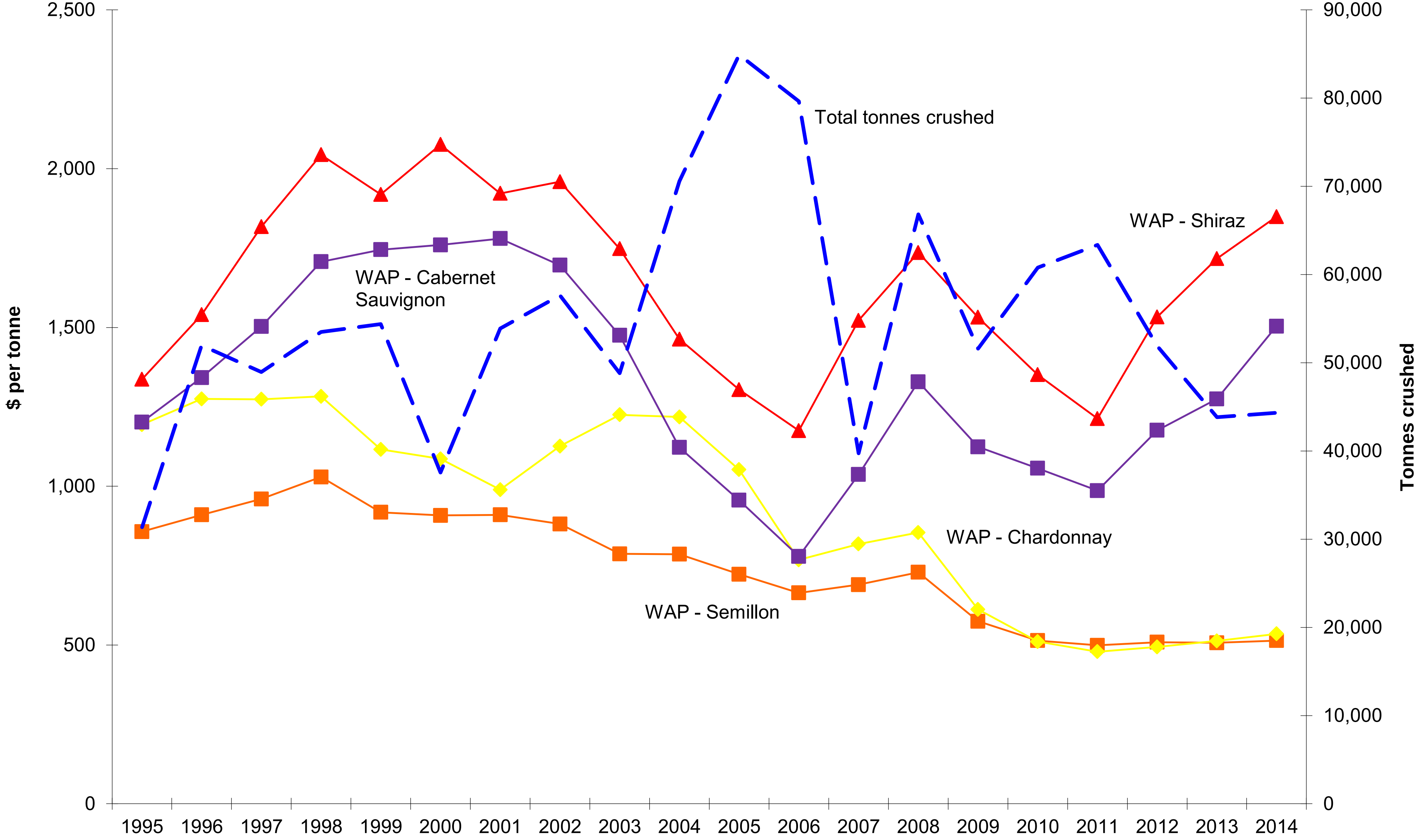
Variety	Tonnes purchased	Lowest price[1]	Highest price[1]	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed[2]	Est total value ALL grapes
WHITE								
Chardonnay	1,198	$200	$1,000	$640,816	$535	864	2,062	$1,102,809
Chenin Blanc	41			$17,599	$431	3	43	$18,732
Marsanne	5			$10,736	$1,988	46	52	$102,946
Muscadelle	4			$3,400	$771	3	7	$5,713
Muscat A Petit Grains Blanc	239	$700	$1,000	$190,053	$795	128	367	$291,546
Muscat Gordo Blanco	5			$3,866	$756	28	33	$25,122
Other white	77	$600	$1,500	$73,204	$950	104	181	$140,781
Pedro Ximenez	2			$2,050	$1,250	12	14	$17,050
Pinot Gris	34			$29,747	$869	31	65	$56,679
Riesling	710	$300	$1,800	$485,402	$684	604	1,314	$898,630
Roussanne	2			$2,160	$1,200	16	17	$20,916
Sauvignon Blanc	682	$200	$900	$542,097	$794	36	718	$570,406
Semillon	1,963	$200	$1,500	$1,009,847	$514	444	2,408	$1,238,409
Traminer	75			$54,222	$723	0	75	$54,222
Verdelho	10			$9,680	$1,000	0	10	$9,680
Viognier	296	$800	$2,250	$311,833	$1,055	83	379	$399,595
Total White winegrapes	**5,344**			**$3,386,711**		**2,402**	**7,745**	**$4,953,235**
Grand Total All winegrapes	**27,459**			**$40,014,308**		**16,877**	**44,336**	**$66,175,605**

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 Barossa Valley is 4.8%.

Barossa Valley

Historical Weighted Average Price vs tonnes crushed



Barossa Valley

Current plantings by variety and year planted

Current area in hectares*

Variety	Pre-2011	2011	2012	2013	Total area	% planted in 2013
Red winegrapes						
Cabernet Franc	29	1	3	0	34	0%
Cabernet Sauvignon	1,485	11	18	15	1,528	1%
Durif (Petite Sirah)	18	0	0	1	19	6%
Grenache	691	4	1	2	698	0%
Malbec	21	0	4	1	25	2%
Mataro (Mourvedre)	231	4	8	3	246	1%
Merlot	377	0	0	0	377	0%
Other Red	78	14	8	1	101	1%
Petit Verdot	23	0	0	0	23	0%
Pinot Noir	42	0	0	0	42	0%
Sangiovese	23	3	0	0	27	0%
Shiraz	6,224	73	96	121	6,513	2%
Tempranillo	81	8	7	2	98	3%
Zinfandel	14	0	0	0	14	0%
Total red varieties	**9,337**	**118**	**144**	**146**	**9,744**	**1%**
White winegrapes						
Chardonnay	457	0	0	0	457	0%
Chenin Blanc	17	0	0	0	17	0%
Marsanne	9	0	1	1	11	9%
Muscadelle (Tokay)	17	0	0	0	17	0%
Muscat A Petit Grains Blanc (White Frontignac)	53	2	0	3	57	5%
Other White	58	3	2	2	64	3%
Pinot Gris	9	1	5	1	15	5%
Riesling	239	0	0	1	240	0%
Sauvignon Blanc	85	0	0	0	85	0%
Savagnin	10	0	0	0	10	0%
Semillon	457	0	0	0	457	0%
Vermentino	8	5	0	0	12	0%
Viognier	68	1	0	0	69	0%
Total white varieties	**1,487**	**11**	**7**	**7**	**1,512**	**0%**
Unknown variety	90	0	0	0	90	0%
Total all varieties	**10,913**	**129**	**151**	**152**	**11,345**	**1%**

**Includes plantings in Barossa Zone - other (235 hectares)*