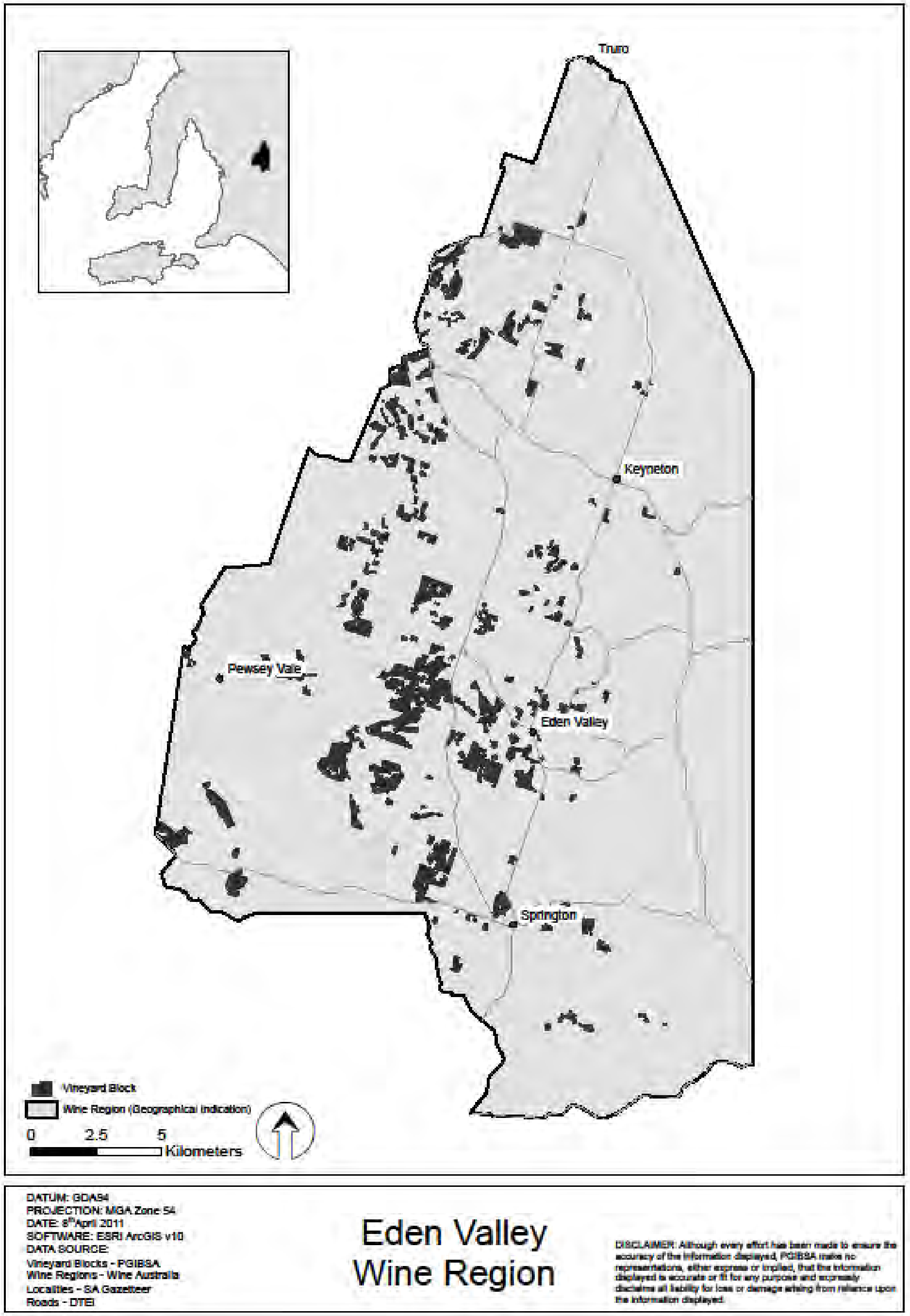

Eden Valley Wine Region

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.

Eden Valley

Vintage overview

Vintage report

Eden Valley received good winter and early spring rainfall, allowing dams to fill to capacity and restore soil moisture. The cool and mild temperatures led to a later bud-burst than previous years, and some two weeks later than the Barossa Valley floor.

Early shoot growth and development was healthy and was aided by consistent weather throughout spring. Flowering in white varieties occurred towards the end of November, and early December in red varieties such as Cabernet Sauvignon. There was even fruit set, small bunches, and overall well-balanced vines.

A heavy rain event in December promoted increased vegetative growth and regular trimming and hedging was required to maintain vine balance. Humid conditions impacted mildew development but subsequent cool and windy conditions lessened the extent of fungal damage.

Veraison occurred quite later than usual. White varieties started to soften in late January; and red varieties only started to colour in February. Crop levels at this time were reasonable but regular rain throughout February increased berry size and weight.

Ripening was slower than usual due to the cooler weather, but these environmental conditions led to exceptional quality and diverse fruit flavours.

The heavy rain event in March posed potential rot problems in some Shiraz vineyards. Fortunately, Cabernet Sauvignon was largely unaffected due to its resilience, tougher skins and late ripening attributes.

Riesling was picked from mid March and red varieties such as Shiraz and Cabernet Sauvignon were picked either side of Easter (end of April into May).

The standout varieties are Riesling which has beautiful natural acidity and pristine flavours, and Cabernet Sauvignon from the warmer sites, which is expressing classic varietal characters and structure.

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

Overview of vintage statistics

The harvest from Eden Valley was 12,262 tonnes in 2011, 13% higher than the 2010 harvest of 10,876 tonnes. The total value of grapes from the region decreased slightly from $12.3 million in 2010 to $11.9 million. The average purchase value for Riesling decreased again by $57 per tonne to $1,015 per tonne, with Chardonnay increasing by $73 in value to $816 per tonne. However, Shiraz fell by $305 per tonne (20%) to $1,192 per tonne.

There was only 11 hectares of new plantings in Eden Valley in spring 2010 (including top-working and replacements), with the total area of planted vines in the region decreasing by 34 hectares to 2,231 hectares.

The estimated production from Eden Valley for 2012 is around 14,600 tonnes. The wineries' committed intake is 12,300 tonnes, leaving 2,300 tonnes of uncommitted fruit.

In 2016, the estimated production is 14,700 tonnes under contract or winery grown fruit leaving 4,100 tonnes (27.9%) available on the open market.

Eden 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
RED								
Cabernet Franc	0			$0	$0	1	1	$1,323
Cabernet Sauvignon	794	$300	$5,730	$686,324	$864	1,277	2,072	$1,789,748
Grenache	4			$2,604	$600	12	16	$9,822
Mataro	25			$44,954	$1,777	2	28	$49,014
Merlot	223	$500	$1,000	$170,401	$765	233	456	$348,931
Nebbiolo	0			$0	$0	0	0	$145
Other Red	43	$500	$1,170	$38,253	$885	0	43	$38,253
Petit Verdot	0			$0	$0	36	36	$36,880
Pinot Noir	253	$500	$1,200	$220,042	$868	164	417	$362,382
Shiraz	1,430	$300	$8,500	$1,705,304	$1,192	716	2,146	$2,558,970
Total Red winegrapes	**2,774**			**$2,867,882**		**2,442**	**5,216**	**$5,195,467**
WHITE								
Chardonnay	813	$550	$1,200	$663,220	$816	981	1,793	$1,463,295
Muscadelle	1			$420	$677	0	1	$420
Muscat a Petit Grains Blanc	9			$7,200	$800	0	9	$7,200
Other White	23	$600	$1,400	$25,546	$1,120	27	50	$55,574
Pinot Gris	109	$1,000	$1,250	$117,700	$1,085	298	406	$440,656
Riesling	1,766	$300	$2,200	$1,792,487	$1,015	1,462	3,228	$3,276,606
Roussanne	0			$0	$0	7	7	$6,933
Sauvignon Blanc	221	$350	$1,300	$192,199	$871	366	587	$511,029
Semillon	436	$300	$1,500	$327,923	$752	25	461	$346,783
Traminer	141	$750	$1,400	$140,952	$1,003	44	185	$185,255
Verdelho	13			$13,400	$1,000	0	13	$13,400
Viognier	172			$234,663	$1,368	134	306	$418,182
Total White winegrapes	**3,702**			**$3,515,709**		**3,344**	**7,046**	**$6,725,334**
Total All winegrapes	**6,476**			**$6,383,591**		**5,786**	**12,262**	**$11,920,801**

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 Eden Valley is 4.9%.

Current plantings by variety and year planted

Variety	Current area in hectares Pre-2008	2008	2009	2010	Total area	% planted in 2010
Red winegrapes						
Cabernet Franc	5	0	0	0	5	*0%*
Cabernet Sauvignon	299	0	0	4	303	*1%*
Grenache	22	0	0	0	22	*0%*
Mataro (Mourvedre)	10	0	0	0	10	*0%*
Merlot	78	1	0	0	79	*0%*
Meunier (Pinot Meunier)	4	0	0	0	4	*0%*
Other red	8	1	0	0	9	*0%*
Petit Verdot	11	0	0	0	11	*0%*
Pinot Noir	60	0	0	0	60	*0%*
Sangiovese	0	1	1	0	2	*0%*
Shiraz	682	6	4	2	694	*0%*
Tempranillo	4	1	1	0	6	*0%*
Total red varieties	**1,182**	**10**	**6**	**6**	**1,205**	***0%***
White winegrapes						
Chardonnay	264	1	0	0	264	*0%*
Muscat A Petit Grains Blanc	5	0	0	0	5	*0%*
Other white	7	1	1	0	9	*0%*
Pinot Gris	34	1	2	0	36	*0%*
Riesling	537	2	0	5	543	*1%*
Roussanne	1	1	1	0	3	*0%*
Sauvignon Blanc	53	4	0	0	57	*0%*
Savagnin Blanc	2	3	0	0	5	*0%*
Semillon	45	0	0	0	45	*0%*
Traminer (Gewurztraminer)	16	0	0	0	16	*0%*
Viognier	42	0	0	0	42	*0%*
Total white varieties	**1,006**	**11**	**4**	**5**	**1,025**	***0%***
Unknown variety	1	0	0	0	1	*0%*
Total all varieties	**2,151**	**21**	**11**	**11**	**2,231**	***0%***

Eden Valley

Estimated supply and committed intake 2012 - 2016

Variety	2012				2014				2016			
	Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]			Est Supply [1]	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												
Cabernet Franc	23	3	16	18	23	3	16	18	23	3	16	18
Cabernet Sauvignon	1,197	849	479	1,329	1,205	872	369	1,241	1,205	874	369	1,242
Grenache	108	25	2	27	108	25	0	25	108	26	0	26
Mataro	48	4	37	41	48	4	37	41	48	4	37	41
Merlot	394	229	206	435	396	229	206	435	396	229	206	435
Nebbiolo	0	3	0	3	0	3	0	3	0	3	0	3
Other Red	50	0	18	18	54	0	18	18	54	0	18	18
Petit Verdot	55	37	0	37	55	37	0	37	55	37	0	37
Pinot Noir	542	227	255	482	542	227	143	370	542	227	143	370
Shiraz	4,131	1,024	1,828	2,852	4,153	1,024	1,377	2,401	4,153	1,025	1,342	2,367
Tempranillo	26	5	6	12	28	5	11	16	28	5	11	16
Total red winegrapes	**6,595**	**2,406**	**2,848**	**5,253**	**6,632**	**2,429**	**2,176**	**4,605**	**6,632**	**2,432**	**2,141**	**4,573**
White winegrapes												
Chardonnay	2,113	826	898	1,724	2,115	837	573	1,410	2,115	837	378	1,215
Muscadelle	0	0	4	4	0	0	4	4	0	0	4	4
Muscat a Petit Grains Blanc	32	0	26	26	32	0	26	26	32	0	26	26
Other White	83	32	15	46	92	32	15	46	92	32	19	50
Pinot Gris	245	253	138	391	249	253	138	391	249	253	138	391
Riesling	4,304	1,804	1,659	3,463	4,327	1,833	1,478	3,312	4,327	1,833	1,168	3,001
Roussanne	14	2	21	23	17	5	21	26	17	5	21	26
Sauvignon Blanc	444	269	207	476	453	269	207	476	453	272	218	490
Semillon	357	39	306	345	357	39	283	322	357	39	283	322
Traminer	129	60	147	207	129	60	138	198	129	63	138	201
Verdelho	0	0	14	14	0	0	14	14	0	0	14	14
Viognier	338	123	193	316	338	123	193	316	338	123	193	316
Total white winegrapes	**8,060**	**3,408**	**3,629**	**7,037**	**8,108**	**3,451**	**3,091**	**6,542**	**8,108**	**3,457**	**2,601**	**6,058**
All winegrapes	**14,654**	**5,813**	**6,476**	**12,290**	**14,740**	**5,880**	**5,267**	**11,146**	**14,740**	**5,889**	**4,742**	**10,631**

[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*