Fleurieu zone - other

Regional summary report 2010

Fleurieu zone (other) includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are near but outside the larger GI regions of Currency Creek, McLaren Vale and Langhorne Creek (referred to as "Fleurieu zone (other)" in tables). The total area of vines included in this definition is around 900 hectares.

Southern Fleurieu / Kangaroo Island Wine Regions and Fleurieu Zone (other)

Overview of vintage statistics

The harvest from Fleurieu zone (other) was 2,768 tonnes in 2010 – 30% down on the already low 2009 harvest and substantially below the 2008 harvest. The total estimated value of grapes from these vineyards further decreased to $2.1 million, 40% less than the 2009 value.

There were virtually no new plantings in this area in spring 2009.

The estimated production for this area in 2011 is around 5,400 tonnes. The wineries' committed intake is 2,700 tonnes, leaving the other half of the estimated production for the open market.

The production forecast does not increase significantly over the five year projection period, but the wineries' committed intake decreases to 1,800 tonnes by 2015, leaving at least 3,600 tonnes of fruit likely to be available on the open market.

ACKNOWLEDGEMENTS

This survey has been produced by the Phylloxera and Grape Industry Board of South Australia on behalf of the **South Australian Wine Industry Association,** the **Wine Grape Council of SA Inc** and **Primary Industries and Resources SA,** who jointly fund the survey.

The publication of this survey is made possible through the support of the South Australian and interstate wineries that processed fruit from South Australian vineyards in 2010. The information is provided voluntarily by wineries on the understanding and assurance that information from individual wineries will be kept strictly confidential. Only aggregate responses are reported. Draft results and supply forecasts are checked by regional industry representatives. Vintage reports have been provided by the regional representatives, local growers or industry associations. Particular thanks for their assistance go to: Jim Caddy, David Edwards, James Freckleton, Juliet Henderson, Elise Heyes, Lian Jaensch, Murray Leake, Frank Nicholls, Louise Rose, Stuart Sharman, Nigel Squire, Michelle Stehbans, David Watkins, and Daniel Zuzolo.

The survey publication is available on the Board's website www.phylloxera.com.au. The state summary and regional reports can be downloaded as PDF files. Previous reports (since 2000) are also available on the website, and hard copies of reports from previous years back to 1998 are available from the Board's office.

COVER IMAGE

Photograph by Catherine Cox, Phylloxera and Grape Industry Board of SA.

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DISCLAIMER

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DOCUMENT STRUCTURE AND LAYOUT

The full survey report incorporates 15 stand-alone regional reports, covering the major declared GI regions in South Australia, and a state summary section with aggregate data, forecasts by variety and historical comparisons. The report may be downloaded as one document or in sections as a series of PDF files from the PGIBSA website www.phylloxera.com.au.

INTERPRETATION OF REPORT INFORMATION

Please refer to the **EXPLANATIONS AND DEFINITIONS** for definitions, limitations and interpretations of different statistics reported.

Any questions about the report should be directed to:

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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 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.

Demand (required intake)

Following consultation with industry during 2009, it was decided to omit demand figures from the 2010 survey. These figures were considered by the majority of respondents to be unreliable and/or unhelpful. They also add considerably to the survey load for the wineries. Readers of this report are encouraged to provide feedback on this decision either directly to SAWIA or the WGCSA, or to the PGIBSA.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2010 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 2010 and include all plantings from the 2009 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 2010 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.

Winegrape intake summary - vintage 2010

Incorporates Southern Fleurieu (815 tonnes), Kangaroo Island (135 tonnes) and Fleurieu zone - other (1,818 tonnes).

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	225	$300	$3,000	$193,879	$862	57	282	$242,658
Merlot	34			$10,864	$321	36	69	$22,287
Pinot Noir	107	$800	$4,000	$184,103	$1,716	13	120	$206,406
Shiraz	930	$325	$3,000	$651,356	$700	68	998	$698,976
Tempranillo	5			$8,070	$1,600	2	7	$11,414
Total Red winegrapes	**1,301**			**$1,048,271**		**175**	**1,476**	**$1,181,741**
WHITE								
Chardonnay	422	$80	$1,150	$181,591	$431	26	447	$192,686
Other White	0					4	4	$2,856
Pinot Gris	269	$500	$2,000	$240,316	$894	17	286	$255,372
Riesling	27			$28,077	$1,050	3	29	$30,786
Sauvignon Blanc	403	$455	$1,800	$368,231	$913	14	417	$381,126
Semillon	72	$350	$800	$31,591	$439	23	95	$41,582
Viognier	9			$7,872	$875	4	13	$11,668
Total White winegrapes	**1,201**			**$857,678**		**90**	**1,292**	**$916,075**
Grand Total All winegrapes	**2,502**			**$1,905,949**		**266**	**2,768**	**$2,097,816**

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 Fleurieu zone (other) is 5%.

Fleurieu zone (other)

Current plantings by variety and year planted

		Current area in hectares					
Southern Fleurieu	**Variety**	*Pre-2007*	*2007*	*2008*	*2009*	*Total area*	*% planted in 2009*
	Cabernet Sauvignon	84	0	0	0	84	0%
	Merlot	39	0	0	0	39	0%
	Other red	6	0	2	0	8	5%
	Pinot Noir	32	0	1	0	32	0%
	Shiraz	124	0	0	0	124	0%
	Chardonnay	100	0	0	0	100	0%
	Other white	3	0	1	0	4	0%
	Pinot Gris	18	11	3	0	32	0%
	Riesling	8	0	0	0	8	0%
	Sauvignon Blanc	75	1	0	0	76	0%
	Semillon	22	0	0	0	22	0%
	Verdelho	6	0	0	0	6	0%
	Viognier	12	0	0	0	12	0%
	Unknown variety	3	0	0	0	3	0%
	Total all varieties	**531**	**12**	**6**	**0**	**550**	**0%**
Kangaroo Island	Cabernet Franc	5	0	1	0	6	0%
	Cabernet Sauvignon	60	0	0	0	60	0%
	Merlot	8	0	0	0	8	0%
	Other red	6	0	1	1	8	7%
	Shiraz	47	4	0	0	51	0%
	Chardonnay	10	0	0	0	10	0%
	Other white	5	0	0	3	7	35%
	Sauvignon Blanc	7	0	0	0	7	0%
	Total all varieties	**147**	**4**	**2**	**3**	**156**	**2%**
Other Fleurieu zone	Cabernet Sauvignon	34	0	0	0	34	0%
	Shiraz	78	10	0	0	88	0%
	Other red	4	0	0	0	4	0%
	Chardonnay	29	0	0	0	29	0%
	Pinot Gris	0	16	0	0	16	0%
	Sauvignon Blanc	9	5	0	0	13	0%
	Other white	12	0	0	0	12	0%
	Total all varieties	**168**	**30**	**0**	**0**	**198**	**0%**
	Total Fleurieu zone (other)	**846**	**47**	**8**	**4**	**904**	**0%**

Fleurieu zone (other) Estimated supply and committed intake 2011 - 2015

Variety	2011 Est Supply [1]	2011 Committed intake[2] *Winery grapes*	2011 *Contract purchases*	2011 *Total committed intake*	2013 Est Supply [1]	2013 Committed intake[2] *Winery grapes*	2013 *Contract purchases*	2013 *Total committed intake*	2015 Est Supply [1]	2015 Committed intake[2] *Winery grapes*	2015 *Contract purchases*	2015 *Total committed intake*
Red winegrapes												
Cabernet Sauvignon	943	70	157	227	943	72	0	72	943	74	0	74
Merlot	256	34	126	160	256	35	0	35	256	35	0	35
Pinot Noir	191	6	26	33	192	7	26	34	192	12	26	38
Shiraz	1,867	74	930	1,003	1,900	81	617	698	1,900	81	617	698
Tempranillo	0	2	5	7	0	3	5	8	0	3	5	8
Total red winegrapes	**3,379**	**186**	**1,244**	**1,430**	**3,417**	**199**	**648**	**847**	**3,417**	**204**	**648**	**852**
White winegrapes												
Chardonnay	822	43	320	363	822	43	262	305	822	43	327	370
Pinot Gris	248	18	399	417	316	18	336	354	316	18	336	354
Riesling	40	0	42	42	40	0	0	0	40	0	0	0
Sauvignon Blanc	527	13	442	455	543	13	217	230	543	13	214	227
Semillon	112	32	0	32	112	32	0	32	112	32	0	32
Viognier	59	4	0	4	59	4	0	4	59	4	0	4
Total white winegrapes	**1,987**	**109**	**1,204**	**1,313**	**2,077**	**109**	**815**	**924**	**2,077**	**109**	**877**	**986**
All winegrapes	**5,366**	**295**	**2,448**	**2,743**	**5,495**	**308**	**1,463**	**1,771**	**5,495**	**313**	**1,525**	**1,838**

[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