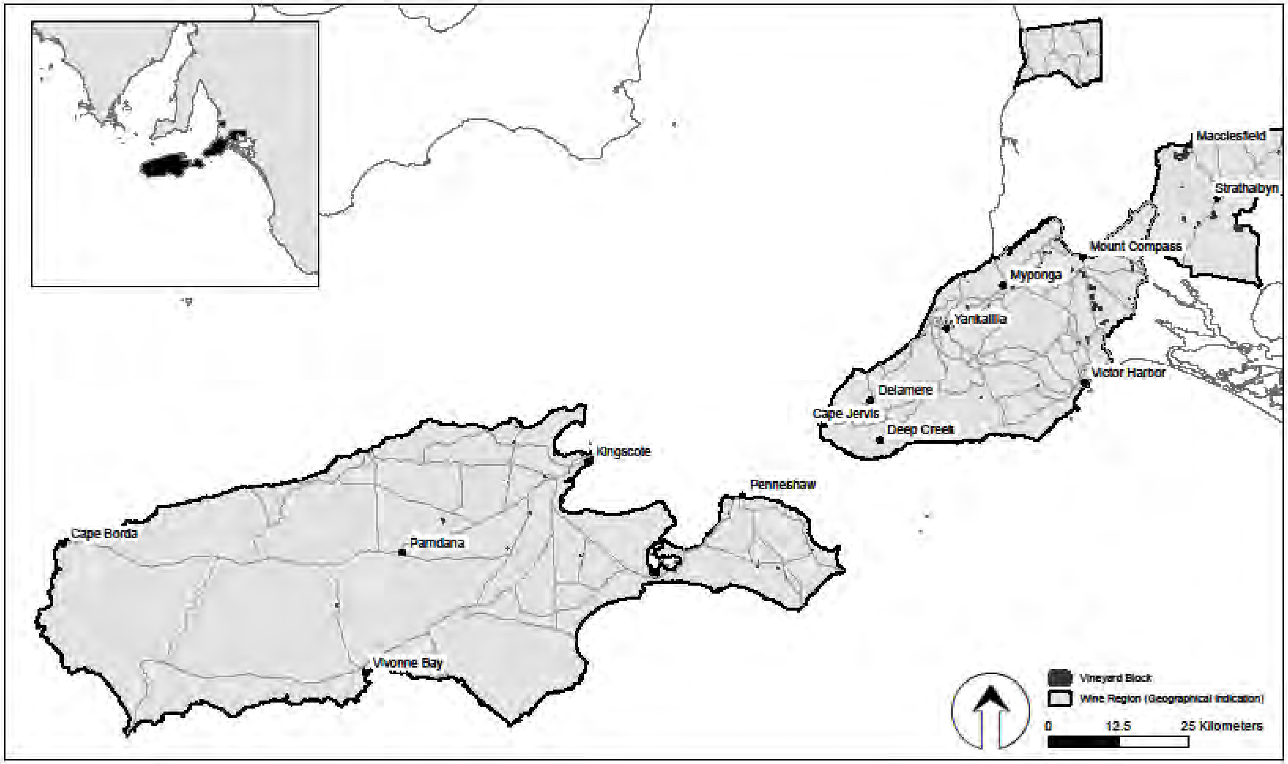
Fleurieu zone - other

Regional summary report 2011

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.



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th April 2011
SOFTWARE: ESRI ArcGIS v10
DATA SOURCE:
Vineyard Blocks - PGIBSA
Wine Regions - Wine Australia
Localities - SA Gazetteer
Roads - DTEI

Southern Fleurieu, Kangaroo Island Wine Regions and Fleurieu other

Overview of vintage statistics

The harvest from Fleurieu zone (other) was 2,293 tonnes in 2011 – 12% down on the already low 2010 harvest. The total estimated value of grapes from these vineyards further decreased to $1.8 million, 12% less than the 2010 value.

There were no new plantings in this area in spring 2010.

The estimated production for this area in 2012 is around 5,500 tonnes. The wineries' committed intake is 3,300 tonnes, leaving 2,200 tonnes of uncommitted fruit.

The production forecast does not increase significantly over the five year projection period, but the wineries' committed intake decreases to 1,600 tonnes by 2016, leaving at least 3,900 tonnes of fruit likely to be available on the open market.

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.

Winegrape intake summary - vintage 2011

Incorporates Southern Fleurieu (1,134 tonnes), Kangaroo Island (153 tonnes) and Fleurieu zone - other (1,005 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	384	$350	$2,000	$350,543	$914	142	526	$480,324
Grenache	39			$12,513	$324	0	39	$12,513
Merlot	76			$76,170	$1,000	56	132	$132,060
Petit Verdot	9			$6,944	$772	0	9	$6,944
Pinot Noir	0			$0	$0	15	15	$15,086
Shiraz	551	$450	$2,000	$603,458	$1,095	88	639	$699,829
Tempranillo	25	$1,100	$1,500	$31,822	$1,250	0	25	$31,822
Total Red winegrapes	**1,084**			**$1,081,450**		**301**	**1,385**	**$1,378,579**
WHITE								
Chardonnay	74	$300	$1,150	$34,343	$466	76	150	$69,745
Pinot Gris	331			$148,982	$450	14	345	$155,264
Riesling	42			$29,106	$700	5	47	$32,738
Sauvignon Blanc	163			$94,720	$582	81	244	$141,816
Semillon	0			$0	$0	85	85	$42,692
Viognier	0			$0	$0	39	39	$19,621
Total White winegrapes	**609**			**$307,150**		**299**	**908**	**$461,876**
Total All winegrapes	**1,693**			**$1,388,600**		**600**	**2,293**	**$1,840,455**

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 6.9 %.

Fleurieu zone (other) — Current plantings by variety and year planted

	Variety	Current area in hectares					
		Pre-2008	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*
Southern Fleurieu	Cabernet Sauvignon	84	0	0	0	84	*0%*
	Merlot	39	0	0	0	39	*0%*
	Other red	6	2	1	0	8	*0%*
	Pinot Noir	32	1	0	0	32	*0%*
	Shiraz	126	0	0	0	126	*0%*
	Chardonnay	99	0	0	0	99	*0%*
	Other white	3	1	0	0	4	*0%*
	Pinot Gris	29	3	0	0	32	*0%*
	Riesling	8	0	0	0	8	*0%*
	Sauvignon Blanc	76	0	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	**544**	**6**	**1**	**0**	**551**	***0%***

	Variety	Current area in hectares					
		Pre-2008	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*
Kangaroo Island	Cabernet Franc	5	1	0	0	6	*0%*
	Cabernet Sauvignon	46	0	0	0	46	*0%*
	Merlot	5	0	0	0	5	*0%*
	Other red	5	1	1	0	7	*0%*
	Shiraz	51	0	0	0	51	*0%*
	Chardonnay	10	0	0	0	10	*0%*
	Other white	2	0	3	0	5	*0%*
	Riesling	3	0	0	0	3	*0%*
	Sauvignon Blanc	7	0	0	0	7	*0%*
	Unknown variety	3	0	0	0	3	*0%*
	Total all varieties	**137**	**2**	**3**	**0**	**142**	***0%***

	Variety	Current area in hectares					
		Pre-2008	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*
Fleurieu zone - other	Cabernet Sauvignon	34	0	0	0	34	*0%*
	Shiraz	88	0	0	0	88	*0%*
	Other red	6	0	0	0	6	*0%*
	Chardonnay	29	0	0	0	29	*0%*
	Pinot Gris	16	0	0	0	16	*0%*
	Sauvignon Blanc	13	0	0	0	13	*0%*
	Other white	12	0	0	0	12	*0%*
	Total all varieties	**198**	**0**	**0**	**0**	**198**	***0%***
	Total Fleurieu zone (other)	**880**	**8**	**4**	**0**	**892**	***0%***

Fleurieu zone - other

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												
Cabernet Sauvignon	901	192	213	405	901	192	84	276	901	192	84	276
Grenache	0	0	43	43	0	0	54	54	0	0	54	54
Merlot	249	57	0	57	249	57	0	57	249	57	0	57
Petit Verdot	0	0	10	10	0	0	10	10	0	0	10	10
Pinot Noir	192	21	28	49	193	21	0	21	193	21	0	21
Shiraz	1,915	116	1,170	1,286	1,915	114	825	938	1,915	114	205	319
Tempranillo	7	16	11	27	9	16	11	27	9	16	11	27
Total red winegrapes	**3,382**	**403**	**1,474**	**1,877**	**3,388**	**401**	**982**	**1,383**	**3,388**	**401**	**363**	**764**
White winegrapes												
Chardonnay	821	115	418	533	821	115	329	443	821	119	0	119
Pinot Gris	316	11	236	247	320	16	236	252	320	16	236	252
Riesling	40	8	43	50	40	8	0	8	40	8	0	8
Sauvignon Blanc	543	203	234	437	543	205	198	403	543	205	71	276
Semillon	112	89	0	89	112	91	0	91	112	91	0	91
Viognier	115	50	0	50	115	49	0	49	115	49	0	49
Total white winegrapes	**2,115**	**475**	**931**	**1,406**	**2,123**	**484**	**762**	**1,247**	**2,123**	**489**	**307**	**796**
All winegrapes	**5,497**	**878**	**2,405**	**3,283**	**5,511**	**885**	**1,745**	**2,630**	**5,511**	**890**	**670**	**1,560**

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

[2] A raising factor of 1.07 has been applied to committed intake to allow for non-respondents