

# SA Winegrape Crush Survey Regional Summary Report - 2013

## Fleurieu zone (other) Wine Region



## Fleurieu zone (other)

*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 974 hectares.*

## Vintage overview

### *Overview of vintage statistics*

The harvest from Fleurieu zone (other) region was 2,831 tonnes in 2013, down by 569 tonnes (16.7%) on the 2012 harvest of 3,400 tonnes. The total estimated value of grapes from these vineyards slightly increased from \$2.2 million to \$2.3 million. The average purchase price for all major varieties increased. Of the red varieties – Shiraz is up by \$208 per tonne to \$946 per tonne and Cabernet Sauvignon is up by \$222 per tonne to \$1,042 per tonne. Of the white varieties – Chardonnay is up by \$80 per tonne to \$559 per tonne and Pinot Gris is also up by \$221 per tonne to \$821 per tonne.

There were 13 hectares of new plantings in the Fleurieu zone region in spring 2012 (including top-working and replacements). Shiraz and Cabernet Sauvignon both accounted for 30.8% respectively of the new plantings. The total planted area of vines in the region increased by 61 hectares (6.7%) compared with an increase of 31 hectares (3.5%) in 2011.

The estimated production from the Fleurieu zone region in 2014 is 6,400 tonnes, with the wineries' committed intake being 2,900 tonnes. This leaves around 3,500 tonnes (55%) of uncommitted fruit.

In 2018, the estimated production increases slightly to 6,500 tonnes, of which only 1,100 tonnes is already under contract or winery grown fruit. This leaves an estimated 5,400 tonnes (83%) yet to be contracted or is available on the open market.

## Fleurieu zone - other

## Winegrape intake summary - vintage 2013

*Incorporates Southern Fleurieu (687 tonnes), Kangaroo Island (260 tonnes) and Fleurieu zone - other (1,884 tonnes).*

| Variety                           | Tonnes purchased | Lowest price <sup>1</sup> | Highest price <sup>1</sup> | Total value purchased grapes | Calc avg. purch. value per tonne | Winery grown fruit | Total crushed <sup>2</sup> | Est total value ALL grapes |
|-----------------------------------|------------------|---------------------------|----------------------------|------------------------------|----------------------------------|--------------------|----------------------------|----------------------------|
| <b>RED</b>                        |                  |                           |                            |                              |                                  |                    |                            |                            |
| Cabernet Franc                    | 0                |                           |                            | \$0                          | \$0                              | 12                 | 12                         | \$11,275                   |
| Cabernet Sauvignon                | 260              | \$500                     | \$1,550                    | \$270,539                    | \$1,042                          | 24                 | 284                        | \$295,856                  |
| Grenache                          | 58               |                           |                            | \$18,403                     | \$318                            | 9                  | 67                         | \$21,166                   |
| Malbec                            | 0                |                           |                            | \$0                          | \$0                              | 4                  | 4                          | \$4,066                    |
| Mataro                            | 10               |                           |                            | \$3,135                      | \$300                            | 0                  | 10                         | \$3,135                    |
| Merlot                            | 59               | \$500                     | \$1,200                    | \$42,003                     | \$707                            | 15                 | 75                         | \$52,898                   |
| Pinot Noir                        | 15               |                           |                            | \$13,068                     | \$900                            | 9                  | 23                         | \$20,745                   |
| Sangiovese                        | 0                |                           |                            | \$0                          | \$0                              | 13                 | 13                         | \$12,199                   |
| Shiraz                            | 1,033            | \$500                     | \$1,800                    | \$977,119                    | \$946                            | 53                 | 1,086                      | \$1,027,494                |
| Tempranillo                       | 2                |                           |                            | \$3,535                      | \$1,556                          | 0                  | 2                          | \$3,535                    |
| <b>Total Red winegrapes</b>       | <b>1,437</b>     |                           |                            | <b>\$1,327,802</b>           |                                  | <b>140</b>         | <b>1,577</b>               | <b>\$1,452,369</b>         |
| <b>WHITE</b>                      |                  |                           |                            |                              |                                  |                    |                            |                            |
| Chardonnay                        | 347              | \$540                     | \$1,200                    | \$193,568                    | \$559                            | 5                  | 352                        | \$196,360                  |
| Other white                       | 0                |                           |                            | \$0                          | \$0                              | 3                  | 3                          | \$2,331                    |
| Pinot Gris                        | 495              | \$750                     | \$1,050                    | \$406,181                    | \$821                            | 17                 | 511                        | \$419,863                  |
| Riesling                          | 35               |                           |                            | \$21,030                     | \$600                            | 5                  | 40                         | \$24,030                   |
| Sauvignon Blanc                   | 301              |                           |                            | \$221,014                    | \$735                            | 33                 | 333                        | \$244,973                  |
| Semillon                          | 0                |                           |                            | \$0                          | \$0                              | 8                  | 8                          | \$5,721                    |
| Viognier                          | 0                |                           |                            | \$0                          | \$0                              | 7                  | 7                          | \$5,006                    |
| <b>Total White winegrapes</b>     | <b>1,177</b>     |                           |                            | <b>\$841,792</b>             |                                  | <b>78</b>          | <b>1,255</b>               | <b>\$898,284</b>           |
| <b>Grand Total All winegrapes</b> | <b>2,614</b>     |                           |                            | <b>\$2,169,594</b>           |                                  | <b>217</b>         | <b>2,831</b>               | <b>\$2,350,653</b>         |

<sup>1</sup> 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.

<sup>2</sup> It is estimated that the non-response rate for Fleurieu Zone other is 0.0%.

## Fleurieu zone (other)

## Current plantings by variety and year planted

|                   |                            | Current area in hectares |            |          |          | Total area | % planted in 2012 |
|-------------------|----------------------------|--------------------------|------------|----------|----------|------------|-------------------|
| Variety           |                            | Pre-2010                 | 2010       | 2011     | 2012     |            |                   |
| Southern Fleurieu | Cabernet Sauvignon         | 78                       | 0          | 0        | 2        | 80         | 3%                |
|                   | Merlot                     | 35                       | 0          | 0        | 0        | 35         | 0%                |
|                   | Other Red                  | 6                        | 0          | 0        | 0        | 6          | 0%                |
|                   | Pinot Noir                 | 28                       | 0          | 0        | 1        | 29         | 3%                |
|                   | Shiraz                     | 123                      | 0          | 0        | 0        | 123        | 0%                |
|                   | Chardonnay                 | 94                       | 0          | 0        | 0        | 94         | 0%                |
|                   | Other White                | 4                        | 0          | 0        | 0        | 4          | 0%                |
|                   | Pinot Gris                 | 27                       | 0          | 0        | 0        | 27         | 0%                |
|                   | Riesling                   | 7                        | 0          | 0        | 0        | 7          | 0%                |
|                   | Sauvignon Blanc            | 73                       | 0          | 0        | 0        | 73         | 0%                |
|                   | Semillon                   | 22                       | 0          | 0        | 0        | 22         | 0%                |
|                   | Verdelho                   | 1                        | 0          | 0        | 0        | 1          | 0%                |
|                   | Viognier                   | 11                       | 0          | 0        | 0        | 11         | 0%                |
|                   | Unknown variety            | 3                        | 0          | 0        | 0        | 3          | 0%                |
|                   | <b>Total all varieties</b> |                          | <b>514</b> | <b>0</b> | <b>0</b> | <b>4</b>   | <b>517</b>        |

|                 |                            | Current area in hectares |            |          |          | Total area | % planted in 2012 |
|-----------------|----------------------------|--------------------------|------------|----------|----------|------------|-------------------|
| Variety         |                            | Pre-2010                 | 2010       | 2011     | 2012     |            |                   |
| Kangaroo Island | Cabernet Franc             | 6                        | 0          | 0        | 0        | 6          | 0%                |
|                 | Cabernet Sauvignon         | 43                       | 0          | 0        | 0        | 43         | 0%                |
|                 | Merlot                     | 5                        | 0          | 0        | 0        | 5          | 0%                |
|                 | Other Red                  | 7                        | 0          | 0        | 0        | 7          | 0%                |
|                 | Shiraz                     | 50                       | 0          | 0        | 0        | 50         | 0%                |
|                 | Chardonnay                 | 10                       | 0          | 0        | 0        | 10         | 0%                |
|                 | Other White                | 4                        | 0          | 0        | 0        | 4          | 0%                |
|                 | Riesling                   | 3                        | 0          | 0        | 0        | 3          | 0%                |
|                 | Sauvignon Blanc            | 7                        | 0          | 0        | 0        | 7          | 0%                |
|                 | Unknown variety            | 5                        | 0          | 0        | 0        | 5          | 0%                |
|                 | <b>Total all varieties</b> |                          | <b>141</b> | <b>0</b> | <b>0</b> | <b>0</b>   | <b>141</b>        |

|                                    |                            | Current area in hectares |            |          |           | Total area | % planted in 2012 |
|------------------------------------|----------------------------|--------------------------|------------|----------|-----------|------------|-------------------|
| Variety                            |                            | Pre-2010                 | 2010       | 2011     | 2012      |            |                   |
| Fleurieu zone - other              | Cabernet Sauvignon         | 34                       | 0          | 0        | 2         | 37         | 7%                |
|                                    | Other Red                  | 19                       | 0          | 0        | 2         | 22         | 11%               |
|                                    | Shiraz                     | 119                      | 0          | 0        | 4         | 124        | 3%                |
|                                    | Chardonnay                 | 29                       | 0          | 0        | 0         | 29         | 0%                |
|                                    | Other White                | 15                       | 0          | 0        | 0         | 15         | 0%                |
|                                    | Pinot Gris                 | 26                       | 0          | 0        | 0         | 26         | 0%                |
|                                    | Sauvignon Blanc            | 30                       | 0          | 0        | 0         | 30         | 0%                |
|                                    | Unknown variety            | 34                       | 0          | 0        | 0         | 34         | 0%                |
|                                    | <b>Total all varieties</b> |                          | <b>306</b> | <b>0</b> | <b>0</b>  | <b>9</b>   | <b>316</b>        |
| <b>Total Fleurieu zone (other)</b> |                            | <b>961</b>               | <b>0</b>   | <b>0</b> | <b>13</b> | <b>974</b> | <b>1%</b>         |

Fleurieu zone - other

Estimated supply and committed intake 2014 - 2018

| Variety                       | 2014                    |                               |                    |                        | 2016                    |                               |                    |                        | 2018                    |                               |                    |                        |
|-------------------------------|-------------------------|-------------------------------|--------------------|------------------------|-------------------------|-------------------------------|--------------------|------------------------|-------------------------|-------------------------------|--------------------|------------------------|
|                               | Est Supply <sup>1</sup> | Committed intake <sup>2</sup> |                    |                        | Est Supply <sup>1</sup> | Committed intake <sup>2</sup> |                    |                        | Est Supply <sup>1</sup> | Committed intake <sup>2</sup> |                    |                        |
|                               |                         | Winery grapes                 | Contract purchases | Total committed intake |                         | Winery grapes                 | Contract purchases | Total committed intake |                         | Winery grapes                 | Contract purchases | Total committed intake |
| <b>Red winegrapes</b>         |                         |                               |                    |                        |                         |                               |                    |                        |                         |                               |                    |                        |
| Cabernet Franc                | 18                      | 13                            | 0                  | 13                     | 18                      | 13                            | 0                  | 13                     | 18                      | 13                            | 0                  | 13                     |
| Cabernet Sauvignon            | 863                     | 25                            | 271                | 296                    | 880                     | 26                            | 236                | 262                    | 880                     | 27                            | 216                | 242                    |
| Grenache                      | 0                       | 9                             | 0                  | 9                      | 0                       | 9                             | 0                  | 9                      | 0                       | 9                             | 0                  | 9                      |
| Malbec                        | 0                       | 5                             | 0                  | 5                      | 0                       | 5                             | 0                  | 5                      | 0                       | 5                             | 0                  | 5                      |
| Merlot                        | 359                     | 16                            | 86                 | 103                    | 359                     | 16                            | 86                 | 103                    | 359                     | 16                            | 86                 | 103                    |
| Pinot Noir                    | 169                     | 8                             | 25                 | 33                     | 172                     | 8                             | 25                 | 33                     | 172                     | 8                             | 25                 | 33                     |
| Sangiovese                    | 0                       | 14                            | 0                  | 14                     | 0                       | 14                            | 0                  | 14                     | 0                       | 14                            | 0                  | 14                     |
| Shiraz                        | 2,203                   | 50                            | 1,077              | 1,127                  | 2,226                   | 50                            | 311                | 361                    | 2,226                   | 56                            | 319                | 375                    |
| Tempranillo                   | 0                       | 0                             | 7                  | 7                      | 0                       | 0                             | 7                  | 7                      | 0                       | 0                             | 7                  | 7                      |
| <b>Total red winegrapes</b>   | <b>3,917</b>            | <b>139</b>                    | <b>1,466</b>       | <b>1,606</b>           | <b>3,973</b>            | <b>140</b>                    | <b>665</b>         | <b>806</b>             | <b>3,973</b>            | <b>147</b>                    | <b>653</b>         | <b>799</b>             |
| <b>White winegrapes</b>       |                         |                               |                    |                        |                         |                               |                    |                        |                         |                               |                    |                        |
| Chardonnay                    | 795                     | 12                            | 506                | 518                    | 795                     | 12                            | 43                 | 56                     | 795                     | 12                            | 43                 | 56                     |
| Other white                   | 292                     | 0                             | 10                 | 10                     | 292                     | 0                             | 10                 | 10                     | 292                     | 0                             | 10                 | 10                     |
| Pinot Gris                    | 395                     | 17                            | 439                | 457                    | 395                     | 20                            | 439                | 459                    | 395                     | 21                            | 165                | 185                    |
| Riesling                      | 49                      | 0                             | 0                  | 0                      | 49                      | 0                             | 0                  | 0                      | 49                      | 0                             | 0                  | 0                      |
| Sauvignon Blanc               | 697                     | 34                            | 258                | 292                    | 697                     | 34                            | 15                 | 50                     | 697                     | 34                            | 15                 | 50                     |
| Semillon                      | 112                     | 13                            | 10                 | 24                     | 112                     | 13                            | 10                 | 24                     | 112                     | 13                            | 10                 | 24                     |
| Viognier                      | 143                     | 7                             | 0                  | 7                      | 143                     | 7                             | 0                  | 7                      | 143                     | 7                             | 0                  | 7                      |
| <b>Total white winegrapes</b> | <b>2,482</b>            | <b>85</b>                     | <b>1,224</b>       | <b>1,308</b>           | <b>2,482</b>            | <b>87</b>                     | <b>518</b>         | <b>605</b>             | <b>2,482</b>            | <b>88</b>                     | <b>244</b>         | <b>331</b>             |
| <b>All winegrapes</b>         | <b>6,399</b>            | <b>224</b>                    | <b>2,690</b>       | <b>2,914</b>           | <b>6,454</b>            | <b>227</b>                    | <b>1,184</b>       | <b>1,411</b>           | <b>6,454</b>            | <b>234</b>                    | <b>897</b>         | <b>1,131</b>           |

<sup>1</sup> Supply forecast produced by PGIBSA based on the South Australian vineyard register

<sup>2</sup> A raising factor of 1.028 has been applied to committed intake to allow for non-respondents