

SA Winegrape Crush Survey Regional Summary Report - 2014

Limestone Coast (other) Wine Region



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 5 April 2011
SOFTWARE: ESRI ArcGIS v10
DATA SOURCE:
Vineyard Blocks - PGIBSA
Wine Regions - WINE Australia
Locations - SA Gazetteer
Roads - GDE

**Mount Benson, Robe, Mt Gambier,
and Limestone Coast other
Wine Regions**



DISCLAIMER: Although every effort has been made to provide the accuracy of the information presented herein, the Professional and Wine Industry Board of South Australia does not warrant, represent or guarantee that the information contained in this report is true, accurate and complete. The Board of South Australia is not responsible for any loss or damage arising from reliance upon the information contained herein.

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 receipt – 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.

Limestone Coast zone (other)

Limestone Coast zone (other) includes the GI regions of Mt Benson, Mount Gambier and Robe, and the vineyards around Bordertown, Lucindale, and Beachport, as well as those near but outside the declared GI regions of Padthaway, Coonawarra and Wrattobully. The total area of vines included in this definition is around 3,280 hectares.

Vintage report

Mount Benson

The Mt Benson 2014 vintage will be remembered for its volatile weather early in the season. Persistent ocean 'breezes' coupled with above-average rain in Spring, wreaked havoc with flowering leaving some blocks in the region severely under-cropped. Yield depended on the timing of flowering so was variable across varieties and management regimes. As a result of the light crops (or perhaps the burgeoning reputation of the region), it was nearly impossible to find any fruit that wasn't contracted.

Summer temperatures were very slightly average with a hot spell mid January and, throughout the season, nine days above 35°C. Despite the low crops and warm conditions, veraison was very late pushing ripening back into the cooler Autumn months and this seemed to have a positive impact on flavor profiles. Clean, healthy fruit, extensive and manageable picking windows and cold nights made for easy picking. Fortunately, growers welcomed a delayed break in the season with the heavy rain in April holding off until post-harvest.

Despite its ups and downs, 2014 seems to have created some excellent quality wines. Looking at the resulting styles, one might expect it had been a cooler than average vintage. Whites are looking very strong with good natural acidity and lovely texture. Black pepper seems to have found its way back into a few of our Shiraz parcels and the Cabernet achieved ripe flavours before baumes became excessive or berry shrivel occurred. Not such a good year for making reds without acid additions but all in all winemakers should be pleased.

*Anna Hooper, President
Mt Benson Vignerons Association*

Vintage overview

Overview of vintage statistics

The harvest from Limestone Coast (other) region was 12,728 tonnes in 2014, down by 5,832 tonnes (31.4%) on the 2013 harvest of 18,560 tonnes. There was an estimated non-response rate of 0% across the region. The total value of grapes from the region decreased significantly from \$18.4 million to \$8.1 million. The average purchase value for the red varieties decreased – Shiraz down by \$511 per tonne to \$672 per tonne and Cabernet Sauvignon down by \$374 per tonne to \$641 per tonne. Of the white varieties, the average purchase value increased – Sauvignon Blanc rose slightly by \$38 per tonne to \$864 per tonne.

There were minimal new plantings across the Limestone Coast zone (other) region in spring 2013 (including top-working and replacements). The total planted area of vines in the region increased by 47 hectares (1.4%) from 2012, to 3,330 hectares, mostly in Robe.

Over the last 5 years, the average Limestone Coast zone (other) production was 18,239 tonnes, with a low of 13,610 tonnes in 2011 and a high of 23,184 tonnes in 2009. The 2014 crush is down by 43.3% against the last 5 year average. For 2015, the estimated committed intake is 14,949 tonnes.

Limestone Coast zone - (other)

Winegrape intake summary - vintage 2014

Incorporates Mount Benson (1,255 tonnes), Mt Gambier (675 tonnes), Robe (1,136 tonnes), Bordertown (3,096 tonnes) and Limestone Coast zone - other (6,566 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 Franc	142			\$26,700	\$188	1	144	\$26,942
Cabernet Sauvignon	1,848	\$650	\$2,700	\$1,183,625	\$641	1,816	3,664	\$2,346,713
Malbec	231			\$185,399	\$803	0	231	\$185,399
Mataro	247			\$143,500	\$581	0	247	\$143,500
Merlot	1,015	\$400	\$1,215	\$438,629	\$432	945	1,960	\$847,033
Other red	76	\$800	\$1,200	\$66,850	\$874	11	87	\$76,469
Petit Verdot	220			\$111,790	\$509	8	228	\$115,859
Pinot Noir	205	\$600	\$1,200	\$197,438	\$964	106	311	\$300,036
Shiraz	2,299	\$500	\$2,700	\$1,545,125	\$672	677	2,976	\$2,000,210
Tempranillo	11			\$12,960	\$1,200	11	22	\$26,040
Total Red winegrapes	6,294			\$3,912,016		3,575	9,869	\$6,068,201
WHITE								
Chardonnay	369	\$350	\$1,350	\$227,606	\$617	1,053	1,422	\$877,985
Marsanne	3			\$1,597	\$499	0	3	\$1,597
Muscat A Petit Grains Blanc	11			\$10,780	\$1,000	0	11	\$10,780
Pinot Gris	80	\$750	\$1,035	\$68,190	\$854	86	166	\$142,006
Riesling	14			\$15,400	\$1,100	0	14	\$15,400
Sauvignon Blanc	777	\$650	\$1,100	\$671,750	\$864	217	994	\$858,901
Semillon	51			\$28,116	\$551	163	214	\$117,977
Viognier	34			\$17,145	\$504	0	34	\$17,145
Total White winegrapes	1,339			\$1,040,584		1,519	2,858	\$2,041,790
Grand Total All winegrapes	7,633			\$4,952,599		5,095	12,728	\$8,109,990

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 Limestone Coast zone - other is 0%.

**Limestone Coast zone
(other)**

Current plantings by variety and year planted

	Variety	Current area in hectares				Total area	% planted in 2013
		Pre-2011	2012	2012	2013		
Bordertown	Red winegrapes						
	Cabernet Franc	30	0	0	0	30	0%
	Cabernet Sauvignon	415	0	0	0	415	0%
	Malbec	21	0	0	0	21	0%
	Mataro (Mourvedre)	43	0	0	0	43	0%
	Merlot	219	0	0	0	219	0%
	Other Red	16	3	0	0	19	0%
	Petit Verdot	43	0	0	0	43	0%
	Shiraz	333	0	0	0	333	0%
	Total red varieties	1,120	3	0	0	1,123	0%
	White winegrapes						
	Chardonnay	88	0	0	0	88	0%
	Other White	8	0	0	0	8	0%
	Pinot Gris	12	0	0	0	12	0%
	Sauvignon Blanc	8	0	0	0	8	0%
	Semillon	10	0	0	0	10	0%
	Verdelho	6	0	0	0	6	0%
Total white varieties	131	0	0	0	131	0%	
Total all varieties	1,251	3	0	0	1,254	0%	

	Variety	Current area in hectares				Total area	% planted in 2013
		Pre-2011	2012	2012	2013		
Mount Benson	Red winegrapes						
	Cabernet Franc	3	0	0	0	3	0%
	Cabernet Sauvignon	115	0	0	0	115	0%
	Merlot	52	0	0	0	52	0%
	Petit Verdot	2	0	0	0	2	0%
	Pinot Noir	2	0	0	0	2	0%
	Shiraz	167	0	0	0	167	0%
	Total red varieties	340	0	0	0	340	0%
	White winegrapes						
	Chardonnay	38	0	0	0	38	0%
	Other White	17	0	0	0	17	0%
	Pinot Gris	42	0	0	0	42	0%
	Sauvignon Blanc	67	0	0	0	67	0%
	Total white varieties	164	0	0	0	164	0%
	Total all varieties	504	0	0	0	504	0%

**Limestone Coast zone
(other)**

Current plantings by variety and year planted

Robe	Variety	Current area in hectares				Total area	% planted in 2013
		Pre-2011	2012	2012	2013		
	Red winegrapes						
	Cabernet Sauvignon	226	0	0	0	226	0%
	Malbec	2	0	0	0	2	0%
	Merlot	58	0	0	0	58	0%
	Other Red	0	0	0	3	3	100%
	Pinot Noir	46	0	0	0	46	0%
	Shiraz	171	0	0	0	171	0%
	Total red varieties	502	0	0	3	506	1%
	White winegrapes						
	Chardonnay	101	0	5	0	106	0%
	Pinot Gris	15	0	0	0	15	0%
	Sauvignon Blanc	43	0	0	0	43	0%
	Semillon	12	0	0	0	12	0%
	Total white varieties	172	0	5	0	177	0%
	Total all varieties	674	0	5	3	682	0%

Other Limestone Coast zone

Variety	Current area in hectares				Total area	% planted in 2013
	Pre-2011	2012	2012	2013		
Red winegrapes						
Cabernet Franc	2	0	0	0	2	0%
Cabernet Sauvignon	344	0	0	0	344	0%
Merlot	45	0	0	0	45	0%
Petit Verdot	3	0	0	0	3	0%
Pinot Noir	10	0	0	0	10	0%
Shiraz	136	0	0	0	136	0%
Total red varieties	541	0	0	0	541	0%
White winegrapes						
Chardonnay	41	0	0	0	41	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	9	0	0	0	9	0%
Vermentino	0	2	0	0	2	0%
Total white varieties	55	2	0	0	57	0%
Total all varieties	596	2	0	0	598	0%

**Limestone Coast zone
(other)**

Current plantings by variety and year planted

Mount Gambier	Variety	Current area in hectares				Total area	% planted in 2013
		<i>Pre-2011</i>	<i>2012</i>	<i>2012</i>	<i>2013</i>		
	Red winegrapes						
	Cabernet Sauvignon	13	0	0	0	13	0%
	Merlot	1	0	0	0	1	0%
	Pinot Noir	79	0	0	0	79	0%
	Total red varieties	93	0	0	0	93	0%
	White winegrapes						
	Chardonnay	42	0	0	0	42	0%
	Pinot Gris	33	0	0	0	33	0%
	Riesling	5	0	0	0	5	0%
	Sauvignon Blanc	117	0	0	0	117	0%
	Semillon	1	0	0	0	1	0%
	Viognier	1	0	0	0	1	0%
	Total white varieties	200	0	0	0	200	0%
	Total all varieties	292	0	0	0	292	0%
Total for Limestone Coast zone (other)		3,317	5	5	3	3,330	0%