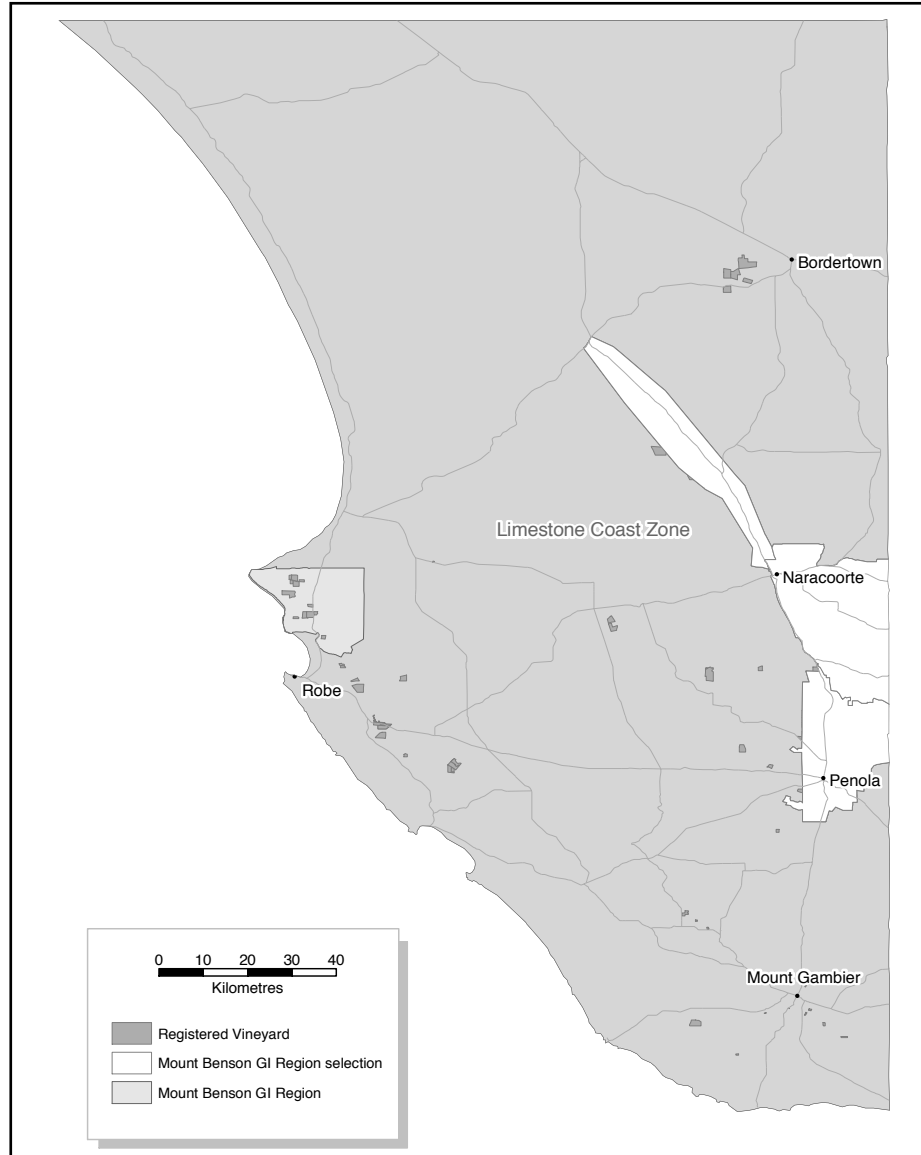


Limestone Coast zone (other)

LIMESTONE COAST ZONE (OTHER) VINTAGE OVERVIEW



Overview of vintage statistics

Limestone Coast zone (other) includes the plantings around Bordertown, Mt Benson, Robe, Lucindale, Beachport, Mount Gambier and near but outside the declared GI regions of Padthaway, Coonawarra and Wrattenbully.

The area accounts for just under 3,000 hectares, and produced 22,519 tonnes in 2005 – considerably less than the record 30,183 tonne harvest in 2004. 81% of the crush was made up of red varieties.

The forecast is for intake to remain at around 20,000 tonnes over the next five years, with half of that intake being Cabernet Sauvignon.

There was very little new planting in these regions in 2005 – a total of 52 hectares (2%). Most of the new plantings were in Shiraz. In Mount Benson, there were 11ha of Sauvignon Blanc planted in 2004 – a 21% increase. The area planted to Sauvignon Blanc in Mount Benson has more than tripled in five years.

Based on the current vineyard area in these regions, and using estimated yield figures of 10t/ha for reds and 11t/ha for whites, the estimated production for Limestone Coast zone (other) in 2008 is around 30,000 tonnes. This is 8000 tonnes (27%) higher than the preferred intake for that year. The main expected surpluses are in Cabernet Sauvignon (4500t), Chardonnay (1000t) and Shiraz (900t).

Note: crop value data is not presented in this report for Limestone Coast zone (other). However, the information is available on the Board's website at www.phylloxera.com.au or on request from the office.



LIMESTONE COAST ZONE (OTHER) CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 10.1

Current area in hectares by year planted

	Variety	Pre-2000	2000	2001	2002	2003	2004	Total area	% planted in 2004
BORDERTOWN	CABERNET FRANC	19	0	10	0	0	0	29	0%
	CABERNET SAUVIGNON	372	5	53	0	0	0	430	0%
	CHARDONNAY	77	0	0	23	0	0	100	0%
	MALBEC	10	9	5	0	0	0	24	0%
	MATARO (MOUVEDRE)	24	19	0	0	0	0	42	0%
	MERLOT	185	48	0	12	0	0	245	0%
	PETIT VERDOT	41	5	0	0	0	0	46	0%
	SEMILLON	10	0	0	0	0	0	10	0%
	SHIRAZ	276	17	14	0	0	22	329	7%
	OTHER VARIETIES (<5ha each)	11	5	0	1	2	0	18	0%
	TOTAL ALL VARIETIES	1026	107	81	36	2	22	1274	2%
MOUNT BENSON	CABERNET SAUVIGNON	98	4	11	4	0	0	116	0%
	CHARDONNAY	31	0	3	7	5	0	45	0%
	MERLOT	25	5	15	5	0	0	50	0%
	PINOT GRIS	0	3	3	0	5	0	11	0%
	SAUVIGNON BLANC	15	12	3	9	4	11	53	21%
	SHIRAZ	77	28	30	23	4	0	161	0%
	VIOGNIER	5	0	0	0	3	2	9	17%
	OTHER VARIETIES (<5ha each)	14	3	7	6	0	0	30	0%
		TOTAL ALL VARIETIES	264	54	70	54	20	13	476
LIMESTONE COAST ZONE OTHER	CABERNET SAUVIGNON	480	18	9	8	15	0	529	0%
	CHARDONNAY	160	0	13	1	3	1	177	1%
	MERLOT	81	1	4	0	0	0	87	0%
	PETIT VERDOT	9	2	0	0	0	0	11	0%
	PINOT NOIR	108	27	6	0	0	0	141	0%
	SAUVIGNON BLANC	17	1	7	0	3	4	32	13%
	SEMILLON	17	0	0	0	0	0	17	0%
	SHIRAZ	213	7	7	0	0	11	238	5%
	OTHER VARIETIES (<5ha each)	3	1	4	0	4	1	14	9%
		TOTAL ALL VARIETIES	1087	58	49	9	25	17	1245

LIMESTONE COAST ZONE (OTHER) TONNES CRUSHED BY VARIETY - VINTAGE 2005

Table 10.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (>0) for		
							Own	Other	Preferred
RED									
Cabernet Franc	352	5	357	5	1%	7136	3	1	1
Cabernet Sauvignon	2,870	3,546	6,416	6,476	55%	99%	11	17	18
Grenache	36	0	36	35	0%	102%	1	0	1
Malbec	351	0	351	0	0%		1	0	0
Mataro	552	77	629	0	12%		1	1	0
Merlot	1,178	2,604	3,782	3,734	69%	101%	9	12	14
Petit Verdot	570	112	682	195	16%	349%	7	2	8
Pinot Noir	300	559	859	956	65%	90%	3	11	9
Shiraz	2,012	3,474	5,487	6,112	63%	90%	11	14	18
Tempranillo	25	0	25	25	0%	100%	1	0	1
Total RED	8,246	10,378	18,623	17,538	56%	106%			
<i>% of grand total</i>			83%	81%					
WHITE									
Chardonnay	1,656	1,023	2,678	2,521	38%	106%	8	11	14
Pinot Gris	39	6	45	80	13%	56%	1	2	2
Riesling	9	6	15	25	39%	60%	1	1	2
Sauvignon Blanc	169	293	462	646	63%	72%	4	10	12
Semillon	207	311	518	528	60%	98%	3	3	5
Verdelho	21	130	151	157	86%	96%	1	3	4
Viognier	9	17	26	66	66%	40%	1	3	4
Total WHITE	2,111	1,785	3,896	4,024	46%	97%			
<i>% of grand total</i>			17%	19%					
Grand Total	10,356	12,163	22,519	21,562	54%	104%			



LIMESTONE COAST (OTHER) ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2006 TO 2010

Table 10.3

Variety	2006			2007			2008			2009			2010		
	estimated	preferred	qualifier ¹	estimated	preferred	qualifier	estimated	preferred	qualifier	estimated	preferred	qualifier	estimated	preferred	qualifier
RED															
Cabernet Franc	330	308	99%	330	308	99%	330	308	99%	330	308	99%	330	308	99%
Cabernet Sauvignon	6,823	6,264	95%	6,517	6,224	95%	6,427	6,187	95%	6,387	6,147	94%	6,387	6,147	94%
Grenache	33	35	100%	33	33	100%	33	33	100%	33	33	100%	33	33	100%
Malbec	350	350	100%	350	350	100%	350	350	100%	350	350	100%	350	350	100%
Mataro	550	550	88%	550	550	88%	550	550	88%	550	550	88%	550	550	88%
Merlot	3,412	3,279	98%	3,310	3,300	96%	3,252	3,257	96%	3,258	3,263	96%	3,258	3,263	96%
Petit Verdot	719	719	95%	725	723	95%	731	729	95%	735	733	95%	735	733	95%
Pinot Noir	536	821	91%	529	853	91%	539	823	91%	463	833	81%	463	833	81%
Shiraz	6,424	6,152	95%	6,385	6,275	92%	6,371	6,341	92%	6,377	6,347	92%	6,377	6,347	92%
Tempranillo	16	16	100%	16	16	100%	16	16	100%	16	16	100%	16	16	100%
Total RED	19,192	18,493		18,745	18,631		18,599	18,593		18,499	18,580		18,499	18,580	
WHITE															
Chardonnay	2,808	2,682	100%	2,828	2,696	100%	2,594	2,513	95%	2,420	2,354	89%	2,420	2,368	89%
Pinot Gris	74	74	96%	87	87	96%	100	100	96%	113	113	96%	113	113	96%
Riesling	15	15	61%	20	20	61%	26	26	61%	31	31	61%	31	31	61%
Sauvignon Blanc	438	638	84%	448	664	84%	460	696	84%	466	714	84%	466	714	84%
Semillon	282	276	61%	148	146	28%	148	146	28%	148	146	28%	148	146	28%
Verdelho	176	164	100%	161	159	100%	161	159	100%	161	159	100%	161	159	100%
Viognier	34	69	72%	76	96	72%	87	87	61%	114	114	61%	114	114	61%
Total WHITE	3,827	3,918		3,768	3,868		3,575	3,727		3,453	3,631		3,453	3,646	
Total all varieties	23,018	22,411		22,513	22,500		22,174	22,320		21,952	22,211		21,952	22,225	

¹ This indicates the percentage of crushed fruit in the current vintage for which forecast intake data was supplied.

LIMESTONE COAST (OTHER) SUPPLY VS DEMAND FORECASTS 2006 AND 2008

Table 10.4

Variety	2006					2008				
	estimated bearing area (ha) ¹	estimated production (tonnes) ²	preferred intake (tonnes) ³	Difference (tonnes)	% difference	estimated bearing area (ha) ¹	estimated production (tonnes) ²	preferred intake (tonnes) ³	Difference (tonnes)	% difference
RED										
Cabernet Franc	34	340	308	33	10%	34	340	308	33	10%
Cabernet Sauvignon	1,060	10600	6,264	4,336	41%	1,075	10750	6,187	4,563	42%
Grenache	3	30	35	-5	-17%	3	30	33	-3	-11%
Malbec	25	250	350	-100	-40%	25	250	350	-100	-40%
Mataro	42	420	550	-130	-31%	42	420	550	-130	-31%
Merlot	382	3820	3,279	541	14%	382	3820	3,257	563	15%
Petit Verdot	63	630	719	-89	-14%	63	630	729	-99	-16%
Pinot Noir	143	1430	821	610	43%	144	1440	823	617	43%
Shiraz	692	6920	6,152	768	11%	728	7280	6,341	939	13%
Tempranillo	2	20	16	4	20%	2	20	16	4	20%
Red Total	2,446	24,460	18,493	5,967	24%	2,498	24,980	18,593	6,387	26%
WHITE										
Chardonnay	314	3454	2,682	772	22%	322	3542	2,513	1,029	29%
Marsanne	4	44	0	44	100%	4	44	0	44	100%
Pinot Gris	9	99	74	25	25%	17	187	100	87	46%
Riesling	3	33	15	18	55%	6	66	26	40	61%
Sauvignon Blanc	66	726	638	88	12%	88	968	696	272	28%
Semillon	32	352	276	76	22%	32	352	146	206	58%
Verdelho	14	154	164	-10	-6%	14	154	159	-5	-3%
Viognier	6	66	69	-3	-5%	12	132	87	45	34%
White Total	448	4,928	3,918	1,010	21%	495	5,445	3,727	1,718	32%
Grand Total	2,894	29,388	22,411	6,977	24%	2,993	30,425	22,320	8,105	27%

This table compares estimated future production (supply) - based on planting data - with estimated future demand (preferred intake). This gives a better indication of possible shortfalls and surpluses than comparing estimated with preferred intake, as estimated intake does not necessarily account for all production of a given variety.

(1) Planting data derived from PGIB vineyard register. Bearing area includes plantings more than three years old.

(2) Bearing area multiplied by yield estimate of 10t/ha for reds and 11t/ha for whites.

(3) Taken from the Utilisation and Pricing survey (see previous page).



