



# Limestone Coast zone - other

## Regional summary report

2012

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

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

DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, PGIBSA makes no representation, either express or implied, that the information displayed is accurate or that any person will expressly disavow all liability for loss or damage arising from reliance upon the information displayed.

# 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*

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 2012 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 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.

## Limestone Coast zone (other)

*Limestone Coast zone (other) includes the GI regions of Mt Benson and Robe, and the vineyards around Bordertown, Lucindale, Beachport and Mount Gambier, 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 3,350 hectares.*

### *Vintage report*

#### **Mount Benson**

The season commenced with very early budburst in all varieties. Vines looked well balanced and healthy early, due to seemingly favourable growing conditions. Daily mean maximum temperatures were below average throughout spring, then more in line with the average leading up to harvest. While the vines showed some unevenness around veraison, the consistent mild to warm weather afforded desirably slow and steady ripening with no extended periods above 30 °C. With the challenges of the 2011 season fresh in the minds of winemakers, we were fortunate to experience drier than average weather throughout the later part of the season, right through until late March by which case most fruit had been harvested. This along with the absence of heavy morning dew, meant disease pressure later in the season remained very low to non-existent for all varieties.

Red yields have been very low consistently across the coastal regions (two separate reports estimate about 25-40% down). While weather during flowering was notably cool, there were no reports of poor berry set as a result. The lower yields could alternatively be attributed to factors such as a high incidence of primary bud necrosis, low bunch numbers per vine and smaller bunches. As many of our growers have recognised the region's propensity to grow top quality fruit, management decisions aimed at smaller and fewer bunches, as well as selective harvest for higher grades, may have also contributed to the lower yields.

Mid February harvest dates were considered particularly early for whites and discussions with local winemakers suggest a 2-3 weeks earlier start to the season than the average over the last 5 years. Similarly reds were nearly 2 weeks ahead of usual from most reports.

From a winemaker's point of view, excitement about wine quality aside, wineries had an ideal season in terms of managing fruit intakes. Almost all the white varieties were finished prior to red varieties and, apart from the first few whites beating the extra vintage staff into the winery, the processing ran seamlessly without any major challenges or fermentation difficulties.

## Vintage overview

With some 2012 whites now already in bottles, flavours are looking riper and more in the tropical spectrum than last year (particularly Sauvignon Blanc and Semillon) and quality is very good. Reds show intense colour and flavour across the board and all reports imply exceptional quality. In particular, Shiraz is showing very good structure and a good aromatic mix of dark fruit and pepper. The positive comments specific to Mt Benson and Robe, Shiraz has been along the lines of 'vintage of the century' and 'cracking good wines'. While Merlot has been the other variety that's had local growers excited about 2012, Cabernet has also been very strong.

*Anna Hooper, President, Mt Benson Vignerons Association*

*Mick Quinlan-Watson, President, Robe Grape Growers Association*

### *Overview of vintage statistics*

The harvest from Limestone Coast (other) was 15,700 tonnes in 2012, a 15.2% increase on the 2011 harvest. The total value of grapes from the region increased from \$10.3 million to \$12.3 million. The average purchase values for Shiraz rose by \$70 per tonne to \$860 per tonne, while Cabernet Sauvignon fell by \$9 per tonne to \$743 per tonne. Sauvignon Blanc increased slightly by \$46 per tonne to \$822 per tonne.

There was only 5 hectares of new plantings across the Limestone Coast zone (other) in spring 2011 (including top-working and replacements).

The estimated production for the Limestone Coast (other) for 2013 is 27,660 tonnes. The wineries' committed intake is 16,000 tonnes, leaving 11,550 tonnes (42%) of uncommitted fruit.

The 2017 estimated supply remains at 27,600 tonnes, while the wineries' committed intake drops to 8,750 tonnes, leaving 18,850 tonnes of fruit uncommitted by the end of the forecast period.

## Limestone Coast zone - other

## Winegrape intake summary - vintage 2012

*Incorporates Mount Benson (1,419 tonnes), Mount Gambier (499 tonnes), Robe (1,535 tonnes)  
and Limestone Coast zone - other (11,597 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	147			\$26,700	\$182	3	150	\$27,246
Cabernet Sauvignon	2,350	\$600	\$2,700	\$1,746,748	\$743	2,589	4,939	\$3,671,687
Malbec	236			\$181,804	\$769	2	238	\$183,342
Mataro	247			\$143,500	\$581	0	247	\$143,500
Merlot	1,204	\$600	\$1,250	\$1,135,619	\$943	1,197	2,402	\$2,265,051
Other Red	104	\$800	\$900	\$87,288	\$837	18	122	\$102,349
Petit Verdot	215			\$105,300	\$489	88	303	\$148,388
Pinot Noir	383	\$600	\$1,200	\$278,536	\$727	81	464	\$337,465
Shiraz	2,649	\$400	\$2,700	\$2,279,480	\$860	1,201	3,850	\$3,312,631
Tempranillo	5			\$6,885	\$1,350	27	32	\$43,335
<b>Total Red winegrapes</b>	<b>7,541</b>			<b>\$5,991,859</b>		<b>5,207</b>	<b>12,748</b>	<b>\$10,234,994</b>
<b>WHITE</b>								
Chardonnay	374	\$585	\$1,350	\$260,816	\$697	1,047	1,421	\$991,094
Marsanne	7			\$3,500	\$500	0	7	\$3,500
Muscat a Petit Grains Blanc	5			\$4,000	\$800	0	5	\$4,000
Muscat Gordo Blanco	31			\$24,480	\$800	0	31	\$24,480
Pinot Gris	123	\$750	\$1,035	\$100,331	\$815	148	271	\$220,709
Riesling	16			\$9,348	\$600	0	16	\$9,348
Sauvignon Blanc	581	\$585	\$1,100	\$477,691	\$822	163	744	\$611,635
Semillon	149			\$61,036	\$411	142	290	\$119,242
Verdelho	65			\$39,920	\$611	44	109	\$66,819
Viognier	39			\$28,980	\$750	2	40	\$30,240
<b>Total White winegrapes</b>	<b>1,389</b>			<b>\$1,010,102</b>		<b>1,545</b>	<b>2,934</b>	<b>\$2,081,066</b>
<b>Total All winegrapes</b>	<b>8,930</b>			<b>\$7,001,961</b>		<b>6,752</b>	<b>15,682</b>	<b>\$12,316,059</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 Limestone Coast zone - other is 0.0%.

**Limestone Coast zone  
(other)**

**Current plantings by variety and year planted**

Bordertown	Variety	Current area in hectares					% planted in 2011
		Pre-2009	2009	2010	2011	Total area	
	<b>Red winegrapes</b>						
	Cabernet Franc	30	0	0	0	30	0%
	Cabernet Sauvignon	416	0	0	0	416	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	12	0	4	3	19	15%
	Petit Verdot	43	0	0	0	43	0%
	Shiraz	333	0	0	0	333	0%
	<b>Total red varieties</b>	<b>1,116</b>	<b>0</b>	<b>4</b>	<b>3</b>	<b>1,123</b>	<b>0%</b>
	<b>White winegrapes</b>						
	Chardonnay	88	0	0	0	88	0%
	Pinot Gris	8	0	0	0	8	0%
	Other white	12	0	0	0	12	0%
	Sauvignon Blanc	8	0	0	0	8	0%
	Semillon	10	0	0	0	10	0%
	Verdelho	10	0	0	0	10	0%
	<b>Total white varieties</b>	<b>136</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>136</b>	<b>0%</b>
	<b>Total all varieties</b>	<b>1,252</b>	<b>0</b>	<b>4</b>	<b>3</b>	<b>1,259</b>	<b>0%</b>

Mount Benson	Variety	Current area in hectares					% planted in 2011
		Pre-2009	2009	2010	2011	Total area	
	<b>Red winegrapes</b>						
	Cabernet Franc	3	0	0	0	3	0%
	Cabernet Sauvignon	116	0	0	0	116	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%
	<b>Total red varieties</b>	<b>341</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>341</b>	<b>0%</b>
	<b>White winegrapes</b>						
	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	65	0	2	0	67	0%
	<b>Total white varieties</b>	<b>162</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>164</b>	<b>0%</b>
	<b>Total all varieties</b>	<b>503</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>505</b>	<b>0%</b>

**Limestone Coast zone  
(other)**

**Current plantings by variety and year planted**

Robe	Variety	Current area in hectares					Total area	% planted in 2011
		Pre-2009	2009	2010	2011			
	<b>Red winegrapes</b>							
	Cabernet Sauvignon	233	0	0	0	233	0%	
	Malbec	2	0	0	0	2	0%	
	Merlot	58	0	0	0	58	0%	
	Petit Verdot	8	0	0	0	8	0%	
	Pinot Noir	64	0	0	0	64	0%	
	Shiraz	174	0	0	0	174	0%	
	<b>Total red varieties</b>	<b>538</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>538</b>	<b>0%</b>	
	<b>White winegrapes</b>							
	Chardonnay	136	0	0	0	136	0%	
	Pinot Gris	15	0	0	0	15	0%	
	Sauvignon Blanc	39	0	0	0	39	0%	
	Savagnin Blanc	5	0	0	0	5	0%	
	Semillon	12	0	0	0	12	0%	
	<b>Total white varieties</b>	<b>207</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>207</b>	<b>0%</b>	
	<b>Total all varieties</b>	<b>747</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>747</b>	<b>0%</b>	

**Other Limestone Coast zone**

	Variety	Current area in hectares					Total area	% planted in 2011
		Pre-2009	2009	2010	2011			
	<b>Red winegrapes</b>							
	Cabernet Franc	2	0	0	0	2	0%	
	Cabernet Sauvignon	338	6	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%	
	<b>Total red varieties</b>	<b>535</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>541</b>	<b>0%</b>	
	<b>White winegrapes</b>							
	Chardonnay	41	0	0	0	41	0%	
	Pinot Gris	0	1	0	0	1	0%	
	Riesling	4	0	0	0	4	0%	
	Sauvignon Blanc	9	0	0	0	9	0%	
	Vermentino	0	0	0	2	2	100%	
	<b>Total white varieties</b>	<b>54</b>	<b>1</b>	<b>0</b>	<b>2</b>	<b>57</b>	<b>3%</b>	
	<b>Total all varieties</b>	<b>589</b>	<b>7</b>	<b>0</b>	<b>2</b>	<b>598</b>	<b>0%</b>	

**Limestone Coast zone  
(other)**

**Current plantings by variety and year planted**

<b>Mount Gambier</b>	<b>Variety</b>	<b>Current area in hectares</b>				<b>Total area</b>	<b>% planted in 2011</b>
		<i>Pre-2009</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>		
	<b>Red winegrapes</b>						
	Cabernet Franc	0	0	0	0	0	0%
	Cabernet Sauvignon	13	0	0	0	13	0%
	Merlot	1	0	0	0	1	0%
	Pinot Noir	71	0	0	0	71	0%
	Shiraz	0	0	0	0	0	0%
	<b>Total red varieties</b>	<b>86</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>86</b>	<b>0%</b>
	<b>White winegrapes</b>						
	Chardonnay	37	0	0	0	37	0%
	Pinot Gris	21	0	0	0	21	0%
	Riesling	5	0	0	0	5	0%
	Sauvignon Blanc	91	1	0	0	92	0%
	Semillon	1	0	0	0	1	0%
	Viognier	1	0	0	0	1	0%
	<b>Total white varieties</b>	<b>156</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>157</b>	<b>0%</b>
	<b>Total all varieties</b>	<b>242</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>243</b>	<b>0%</b>
<b>Total for Limestone Coast zone (other)</b>		<b>3,333</b>	<b>8</b>	<b>5</b>	<b>5</b>	<b>3,351</b>	<b>1%</b>



**Limestone Coast  
zone - other**

**Estimated supply and committed intake 2013 - 2017**

Variety	2013				2015				2017			
	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	323	4	167	171	323	6	167	172	323	6	0	6
Cabernet Sauvignon	8,252	2,495	2,018	4,513	8,264	2,520	1,357	3,877	8,264	2,520	118	2,638
Malbec	196	8	294	302	196	8	228	236	196	8	160	168
Mataro	383	0	248	248	383	0	248	248	383	0	0	0
Merlot	3,284	1,098	1,369	2,467	3,284	1,098	1,369	2,467	3,284	1,098	155	1,253
Other Red	114	18	111	129	131	18	111	129	131	18	105	123
Petit Verdot	524	52	227	279	524	82	227	309	524	33	22	55
Pinot Noir	962	181	353	534	962	181	19	200	962	181	19	200
Shiraz	7,177	1,442	2,524	3,967	7,177	1,456	2,419	3,876	7,177	1,456	457	1,913
Tempranillo	0	22	6	28	0	22	0	22	0	22	0	22
<b>Total red winegrapes</b>	<b>21,214</b>	<b>5,321</b>	<b>7,318</b>	<b>12,638</b>	<b>21,244</b>	<b>5,391</b>	<b>6,145</b>	<b>11,536</b>	<b>21,244</b>	<b>5,342</b>	<b>1,036</b>	<b>6,378</b>
<b>White winegrapes</b>												
Chardonnay	3,114	1,317	592	1,909	3,114	1,317	40	1,357	3,114	1,317	40	1,357
Marsanne	0	0	0	0	0	0	0	0	0	0	0	0
Muscat a Petit Grains Blanc	0	0	0	0	0	0	0	0	0	0	0	0
Muscat Gordo Blanco	0	0	0	0	0	0	0	0	0	0	0	0
Pinot Gris	732	263	123	385	735	315	123	438	735	315	18	333
Riesling	81	0	0	0	81	0	0	0	81	0	0	0
Sauvignon Blanc	1,829	329	248	577	1,835	356	182	538	1,835	356	44	400
Semillon	230	193	172	365	230	195	172	367	230	195	12	207
Verdelho	104	44	22	66	104	44	22	66	104	44	22	66
Viognier	11	12	36	48	11	12	36	48	11	12	0	12
<b>Total white winegrapes</b>	<b>6,349</b>	<b>2,158</b>	<b>1,193</b>	<b>3,351</b>	<b>6,364</b>	<b>2,240</b>	<b>575</b>	<b>2,814</b>	<b>6,364</b>	<b>2,240</b>	<b>136</b>	<b>2,375</b>
<b>All winegrapes</b>	<b>27,564</b>	<b>7,478</b>	<b>8,510</b>	<b>15,989</b>	<b>27,608</b>	<b>7,630</b>	<b>6,720</b>	<b>14,350</b>	<b>27,608</b>	<b>7,581</b>	<b>1,171</b>	<b>8,753</b>

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

<sup>2</sup> A raising factor of 1.0 has been applied to committed intake to allow for non-respondents