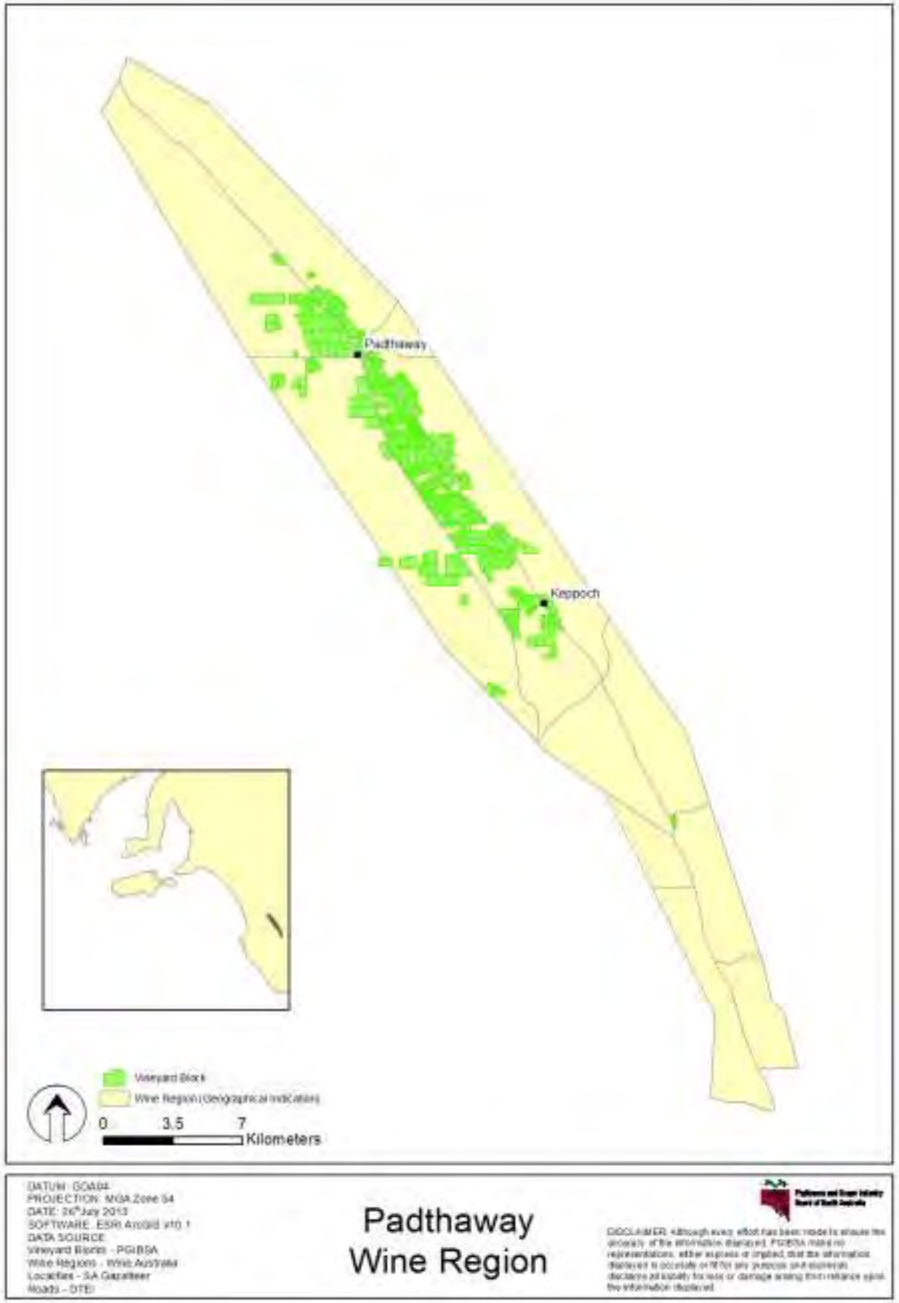

SA Winegrape Crush Survey

Regional Summary Report - 2014

Padthaway Wine Region

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 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.

Padthaway

Vintage overview

Vintage report

The Padthaway Region started off well with full soil moisture profiles after receiving good winter and spring rains. October rainfall was 50% above average which hasn't been seen for some time. Cool windy conditions during the flowering period did lead to a poor fruit set in some varieties. This showed up more in Cabernet Sauvignon but also could be seen in some Chardonnay and Shiraz blocks.

Vintage 2014 saw a relative disease free season this being largely due to the good weather conditions leading up to Vintage.

Vintage commenced in the first week of February 2014 with harvesting of Chardonnay for sparkling base making it an average start to the season. Maturities and flavours developed slowly for the red varieties during March and April as Autumn created milder weather conditions, making growers wait for full flavours to develop with vintage concluding late April which is a little later than normal.

The cool windy conditions during flowering had the biggest impact on reduced yields across the region. The heatwave conditions in mid January saw 5 days with temperatures above 40 degrees but growers were diligent with water management programs maintaining good canopies throughout this period. These well maintained canopies provided good protection during the heatwave conditions reducing sunburning to basically nil.

Winemakers are very happy with the fruit that has been delivered. Reports so far are indicating strong regional characters in both whites and reds with Shiraz again standing out.

Andrew Bryson, President
Padthaway Grape Growers Association

Overview of vintage statistics

The harvest from Padthaway region was 27,685 tonnes in 2014, down by 2,556 tonnes (8.5%) of the 2013 harvest of 30,241 tonnes and for the second year in a row, a lower crush was recorded for this region. There was an estimated non-response rate of 10.2% across the region. The total value of grapes from the region decreased from $25.3 million to $20.7 million. The average purchase values for all major varieties decreased. Of the red varieties – Shiraz down by $107 per tonne to $887 per tonne and Cabernet Sauvignon down by $73 per tonne to $876 per tonne. Of the white varieties – Chardonnay is down by $128 per tonne to $546 per tonne and Pinot Gris slightly down by $14 per tonne to $982 per tonne.

There were 36 hectares of new plantings Padthaway in spring 2013 (including top-working and replacements) compared with 70 hectares in 2012. Cabernet Sauvignon accounted for all of the new plantings. The total area of planted vines in the region increased by 24 hectares to 4,052 hectares.

Over the last 5 years, the average Padthaway production was 33,010 tonnes, with a low of 26,586 tonnes in 2011 and a high of 40,552 tonnes in 2009. The 2014 crush is down by 19.2% against the last 5 year average. For 2015, the estimated committed intake is 20,456 tonnes.

Padthaway

Winegrape intake summary - vintage 2014

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	64			$27,829	$438	0	64	$27,829
Cabernet Sauvignon	3,045	$450	$2,700	$2,669,207	$876	764	3,810	$3,339,213
Malbec	103			$80,647	$780	0	103	$80,647
Merlot	1,084	$400	$1,100	$600,099	$553	649	1,733	$959,168
Pinot Noir	838	$600	$900	$608,726	$727	218	1,055	$766,856
Shiraz	5,782	$400	$2,700	$5,128,484	$887	2,371	8,153	$7,231,111
Tempranillo	0			$0	$0	10	10	$8,709
Total Red winegrapes	**10,916**			**$9,114,992**		**4,012**	**14,928**	**$12,413,533**
WHITE								
Chardonnay	6,547	$280	$1,000	$3,576,198	$546	2,076	8,622	$4,710,104
Other white	76			$15,200	$200	156	202	$111,670
Pinot Gris	1,294	$800	$1,000	$1,270,290	$982	145	1,439	$1,412,250
Riesling	167			$149,980	$896	927	1,095	$980,865
Sauvignon Blanc	858	$550	$1,100	$716,016	$835	131	989	$825,134
Semillon	9			$2,593	$280	44	53	$14,935
Traminer	75			$48,594	$650	129	204	$132,763
Viognier	66			$66,120	$1,000	57	123	$123,120
Total White winegrapes	**9,092**			**$5,844,991**		**3,665**	**12,757**	**$8,310,841**
Grand Total All winegrapes	**20,008**			**$14,959,983**		**7,677**	**27,685**	**$20,724,373**

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 Padthaway is 10.2%.

Padthaway

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2011*	*2011*	*2012*	*2013*	*Total area*	*% planted in 2013*
Red winegrapes						
Cabernet Franc	12	0	0	0	12	*0%*
Cabernet Sauvignon	852	4	4	36	896	*4%*
Malbec	18	0	64	0	83	*0%*
Merlot	186	2	0	0	188	*0%*
Other Red	9	0	0	0	9	*0%*
Pinot Noir	120	0	0	0	120	*0%*
Shiraz	1,222	0	0	0	1,222	*0%*
Total red varieties	**2,419**	**6**	**68**	**36**	**2,530**	***1%***
White winegrapes						
Chardonnay	987	0	0	0	987	*0%*
Other White	10	0	0	0	10	*0%*
Pinot Gris	152	0	0	0	152	*0%*
Riesling	189	0	2	0	191	*0%*
Sauvignon Blanc	89	0	0	0	89	*0%*
Semillon	19	0	0	0	19	*0%*
Traminer (Gewurztraminer)	34	0	0	0	34	*0%*
Verdelho	22	0	0	0	22	*0%*
Viognier	19	0	0	0	19	*0%*
Total white varieties	**1,521**	**0**	**2**	**0**	**1,523**	***0%***
Total all varieties	**3,940**	**6**	**70**	**36**	**4,052**	***1%***