



SA Winegrape Crush Survey

Regional Summary Report 2017

Fleurieu Zone – other

Wine Australia July 2017

DATUM: GDA94
 PROJECTION: MGA Zone 54
 DATE: 8th March 2017
 SOFTWARE: ESRI ArcGIS v10.4
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

Southern Fleurieu, Kangaroo Island
 Wine Regions and Fleurieu other



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Fleurieu zone - other

Vintage overview

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. The total area of vines included in this definition is 942 hectares.

OVERVIEW OF VINTAGE STATISTICS

The harvest from the Fleurieu zone - other region was 3,141 tonnes in 2017, slightly up on the 3,083 tonnes crushed in 2016.

Over the past five years, the average crush for this region is 3,105 tonnes implying that the 2017 yields were very close to average. The minimum crush over the period was 2,831 tonnes in 2013 and the highest was the 2015 crush of 3,603 tonnes.

The total estimated value of grapes from these regions was stable at \$2.8 million but the average purchase value across all fruit increased by 2% to \$866 per tonne. The average purchase price for Shiraz decreased by 17% to \$892 per tonne and Cabernet Sauvignon by 23% to \$1,075 per tonne. On the other hand, Chardonnay was relatively flat at \$618 per tonne and Sauvignon Blanc increased by 16% to \$781 per tonne and Pinot Gris/Grigio by 16% to \$952 per tonne.

The price dispersion data shows that 89% of red tonnages and 73% of white tonnages were purchased at between \$600 and \$1500 – an upward shift in the price dispersion since last year.

Total plantings in this group of regions did not change and there were no reported new plantings.

Fleurieu zone - other

Winegrape intake summary table

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purchase value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes	
Red														
Cabernet Franc											3	100%	3	\$4,292
Cabernet Sauvignon	251	0%		91%	2%	7%	\$270,335	\$1,075	-23%	125	33%	376	\$395,623	
Grenache										2	100%	2	\$3,291	
Merlot	91		31%	69%			\$63,364	\$697	-3%	7	8%	98	\$68,449	
Nero d'Avola	4											4	\$5,880	
Pinot Noir	46		49%			51%	\$103,792	\$2,258		9	16%	54	\$133,978	
Sangiovese										6	100%	6	\$8,584	
Shiraz	1014	1%		95%	1%	3%	\$904,345	\$892	-17%	93	8%	1107	\$1,005,097	
Tempranillo	1											1	\$1,229	
Red total	1407	1%	4%	89%	1%	5%	\$1,348,944	\$959	-15%	245	15%	1652	\$1,626,423	
White														
Chardonnay	348	18%	25%	57%			\$214,924	\$618	0%	55	14%	402	\$248,811	
Pinot Gris/Grigio	254			94%	6%		\$241,974	\$952	16%	108	30%	362	\$346,022	
Sauvignon Blanc	310		2%	95%	3%		\$241,843	\$781	16%	295	49%	605	\$465,522	
Semillon	85		100%				\$31,980	\$375	7%	24	22%	109	\$52,782	
Viognier										8	100%	8	\$6,055	
Other white	2											2	\$4,476	
White total	999	6%	18%	73%	2%	0%	\$735,197	\$736	8%	490	33%	1489	\$1,123,669	
Grand total	2406	3	3%	10%	83%	2%3%	\$2,084,141	\$866	2%	735	23%	3141	\$2,750,092	

Fleurieu zone - other

Current plantings by variety and year planted

Southern Fleurieu

Current area in hectares

Variety	Current area in hectares				% planted in	
	Pre-2014	2014	2015	2016	Total area	2016
Cabernet Sauvignon	70	0	0	0	70	0%
Merlot	36	0	0	0	36	0%
Other Red	6	0	0	0	6	0%
Pinot Noir	30	0	0	0	30	0%
Shiraz	124	0	0	0	124	0%
Chardonnay	89	0	0	0	89	0%
Other White	4	0	0	0	4	0%
Pinot Gris	25	0	0	0	25	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	69	0	0	0	69	0%
Semillon	22	0	0	0	22	0%
Verdelho	1	0	0	0	1	0%
Viognier	9	0	0	0	9	0%
Unknown variety	3	0	0	0	3	0%
Total all varieties	491	0	0	0	491	0%

Source: Vinehealth Australia

Fleurieu - other

Current plantings by variety and year planted

Current area in hectares

Kangaroo Island	Variety	Current area in hectares				% planted in	
		Pre-2014	2014	2015	2016 Total area	2016	2016
	Cabernet Franc	5	0	0	0	5	0%
	Cabernet Sauvignon	41	0	0	0	41	0%
	Merlot	5	0	0	0	5	0%
	Other Red	7	0	0	0	7	0%
	Shiraz	48	0	0	0	48	0%
	Chardonnay	8	0	0	0	8	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%
	Total all varieties	134	0	0	0	134	0%

Fleurieu zone (other)

Current area in hectares

Variety	Current area in hectares				% planted in	
	Pre-2014	2014	2015	2016 Total area	in 2016	in 2016
Cabernet Sauvignon	37	0	0	0	37	0%
Other Red	21	1	0	0	21	0%
Shiraz	128	0	0	0	128	0%
Chardonnay	29	0	0	0	29	0%
Other White	11	0	0	0	11	0%
Pinot Gris	26	0	0	0	26	0%
Sauvignon Blanc	30	0	0	0	30	0%
Unknown variety	36	0	0	0	36	0%
Total all varieties	316	1	0	0	317	0%

Source: Vinehealth Australia

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 Wine Australia.

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 are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 88%; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region

Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price 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 (May 2017).

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.

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. It should also be noted that in minor varieties there may sometimes be very few purchases contributing towards a calculated average purchase value.

Price dispersion data (shaded columns in Intake Summary tables)

All purchases for each variety are grouped into categories according to the price paid for that fruit. The tonnes in each category are converted into a percentage of the total tonnes purchased, giving an indication of what share of fruit was purchased in each price range category. The categories are given nominal titles of A to E for convenience but these do not correspond with grades used by any particular winery.

Estimated total value of all grapes

The estimated total value of all 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.

Explanations and definitions cont.d

PLANTING DATA

Source of planting data tables

Planting data is not collected by the 2017 Australian Wine Sector Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia.

Vinehealth Australia is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of vineyard owners in the state. Vineyard owners with plantings of 0.5 hectares or more are required to register with Vinehealth Australia, and provide details of any changes made to these vineyard plantings within three months of any such change. This information is kept strictly confidential.

Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from Vinehealth Australia.

For more information on registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2017 and include all plantings from the 2016 planting season.
2. Vines planted in a particular year may include top-worked 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 2017 report compared with previous reports.
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 slight variations between tables.

AUSTRALIAN WINE SECTOR SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian Wine Sector Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association, Wine Grape Growers South Australia and Primary Industries and Regions SA.

Maps and planting data tables provided by Brendan Tully, Vinehealth Australia.

The survey publication is available on Wine Australia's website wineaustralia.com, the Vinehealth Australia website vinehealth.com.au and via links from the Wine Grape Council SA website wgcsa.com.au and the South Australian Wine Industry Association website winesa.com.au

Disclaimer

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