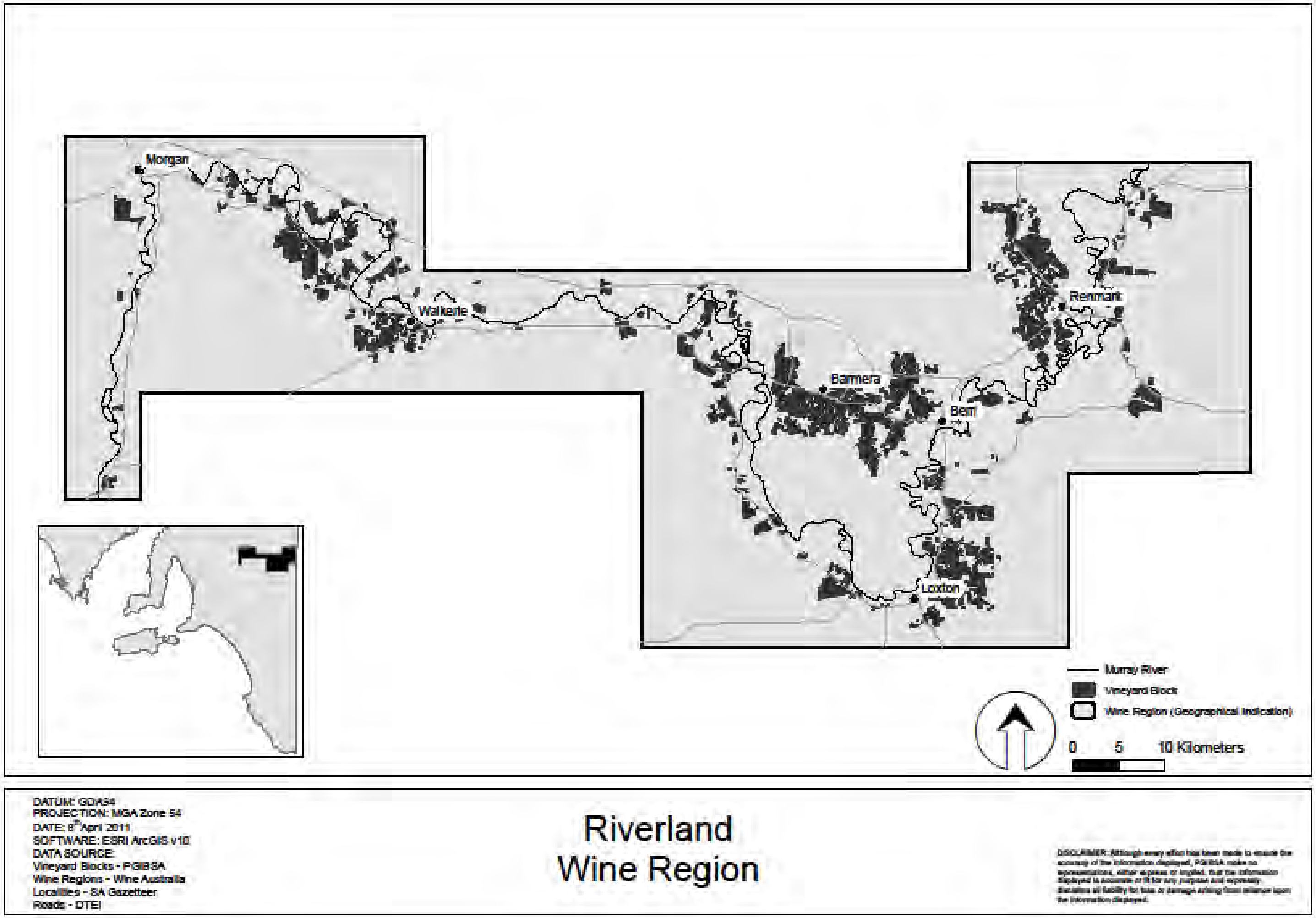
Riverland wine region

Regional summary report 2012



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

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.

Riverland

Vintage overview

Vintage report

The Riverland growing season began a bit earlier than last year with warmer than average temperatures in August and September bringing on bud burst. There were some early infections of downy mildew even though conditions were not thought to be conducive. It is possible that spores overwintered in the bark of the cordon and did not need as much rain to activate. Most growers were aware of the issue and controlled things quickly before any problems.

October through to January was wetter than average and quite mild with very few hot days. This allowed fruit to develop and ripen steadily, leading to higher than normal quality levels. These conditions also lead to some pressure from Powdery mildew and Botrytis although nowhere near that of last season. Rainfall events were often patchy and heavier in localised areas; however there was widespread rain in late November and mid-December. This resulted in larger berry size in the premium varieties especially Shiraz and Chardonnay as well as vegetative growth that was harder to control.

The mild temperatures of January meant that brix levels increased slowly, so harvest began in a similarly slow fashion. There were a couple of widespread rain events in early January and early March which had fears of a repeat of 2011 problems. Fortunately the rest of the vintage was only punctuated with minor rain events. In the end the Riverland was lucky to end up with possibly the best conditions of all grape growing areas to bring in the harvest. The vast majority of the intake was completed by early April so the crush was compressed considerably on previous vintages.

There were small volumes of fruit downgraded due to Botrytis and Powdery mildew; however the harvest was generally of a high quality reflecting the good growing season. Chardonnay yields were down on last year's high, but was still above average. The other main varieties were also a bit above average. So with good yields and high quality fruit the 2012 vintage was a good one.

Ashley Chabrel
Phylloxera and Grape Industry Board

Overview of vintage statistics

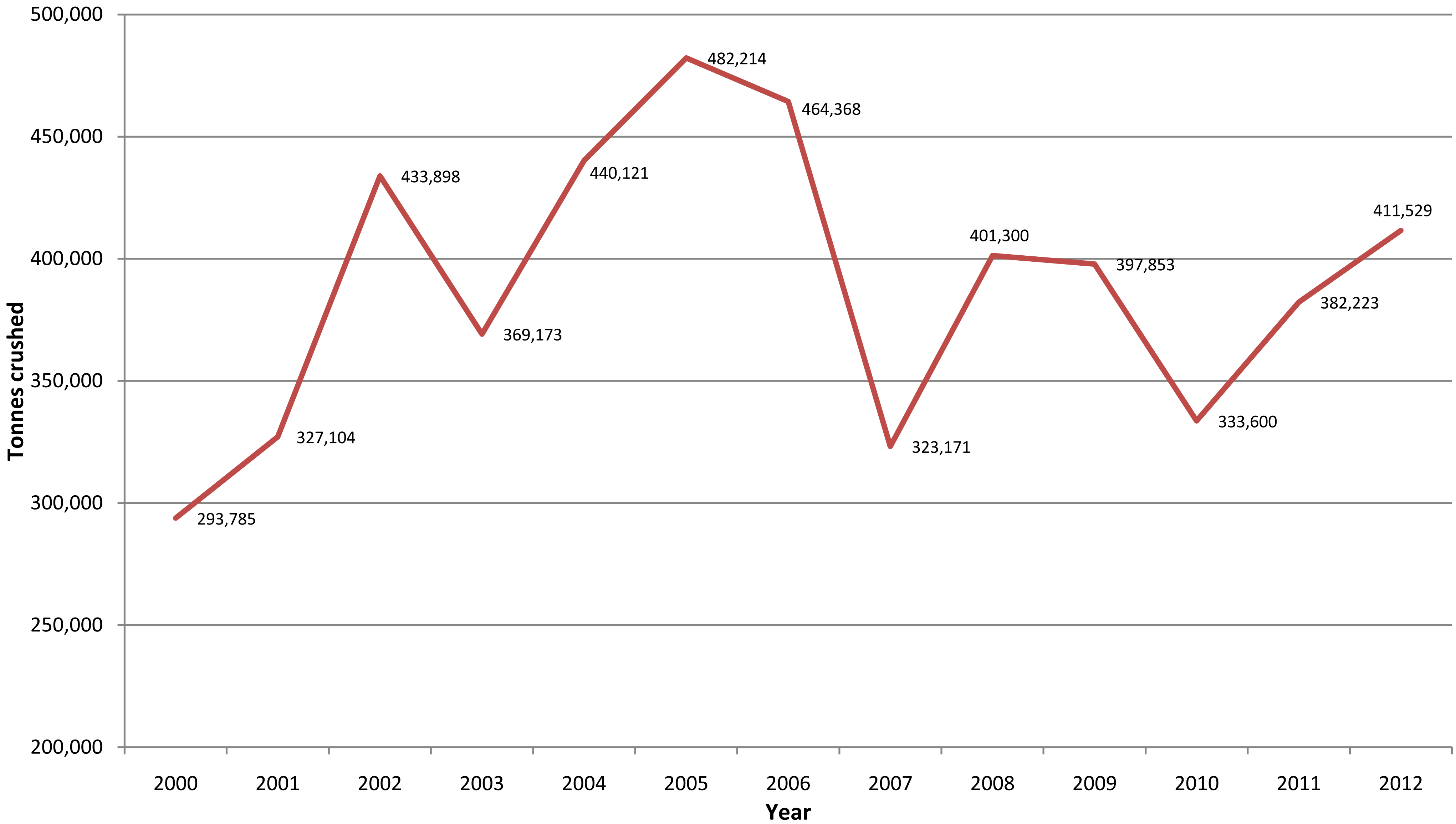
The harvest from the Riverland was 411,529 tonnes in 2012, up by 7.7% on the 2011 harvest. The total value of purchased grapes increased by $31 million to $136.2 million. The average purchase values for all varieties slightly increased – with Shiraz up by $48 per tonne to $351 per tonne and Cabernet Sauvignon up by $70 per tonne to $384 per tonne. While of the white varieties, Chardonnay is up by $53 per tonne to $286 per tonne and Colombard is up by $17 per tonne to $222 per tonne.

There were 95 hectares of new plantings in the Riverland in spring 2011 (including top-working and replacements) compared with 75 hectares in the previous year. Most of the new plantings were in Cabernet Sauvignon 20 hectares (21%), Shiraz 19 hectares (20%) and Muscat Gordo Blanco 17 hectares (17.9%). The total area planted to vines in the Riverland decreased by only 180 hectares compared with 310 hectares in the previous year.

The estimated production from the Riverland for 2013 is 423,200 tonnes. The wineries' committed intake is around 378,900 tonnes, leaving around 44,300 tonnes (10.5%) uncontracted.

By 2017, the estimated production is 425,000 tonnes, of which 347,500 tonnes is already under contract or winery grown fruit. This leaves 77,500 tonnes (18.2%) as yet uncommitted.

Vintage Riverland 2000 - 2012



Riverland

Winegrape intake summary - vintage 2012

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								
Barbera	55	$210	$370	$17,591	$321	0	55	$17,591
Cabernet Franc	3			$663	$260	21	23	$5,993
Cabernet Sauvignon	48,137	$325	$546	$18,502,702	$384	9,385	57,522	$22,110,167
Carignan	0			$0	$0	14	14	$5,079
Grenache	3,957	$210	$375	$1,047,568	$265	82	4,038	$1,069,166
Malbec	237			$61,693	$260	133	371	$96,346
Mataro	1,851	$271	$450	$563,208	$304	0	1,851	$563,208
Merlot	18,476	$325	$750	$7,101,297	$384	4,948	23,424	$9,002,971
Muscat a Petit Grains Rouge	0			$0	$0	4	4	$1,378
Nebbiolo	7			$2,682	$370	0	7	$2,682
Other Red	959	$210	$800	$411,766	$429	180	1,139	$489,126
Petit Verdot	7,163	$250	$630	$2,242,963	$313	3,188	10,351	$3,241,115
Pinot Noir	6,751	$325	$480	$2,950,603	$437	1,047	7,798	$3,408,343
Ruby Cabernet	812	$250	$320	$245,703	$303	113	924	$279,850
Sangiovese	76			$15,931	$211	109	184	$38,807
Shiraz	87,739	$276	$830	$30,755,403	$351	14,505	102,244	$35,839,922
Tarrango	21			$5,175	$250	0	21	$5,175
Tempranillo	405	$250	$630	$162,728	$402	4	409	$164,337
Touriga	56			$12,967	$230	88	144	$33,180
Zinfandel	1			$166	$210	0	1	$166
Total Red winegrapes	**176,703**			**$64,100,809**		**33,820**	**210,523**	**$76,374,600**

1 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.

2 It is estimated that the non-response rate for Riverland is 0.5%.

Riverland

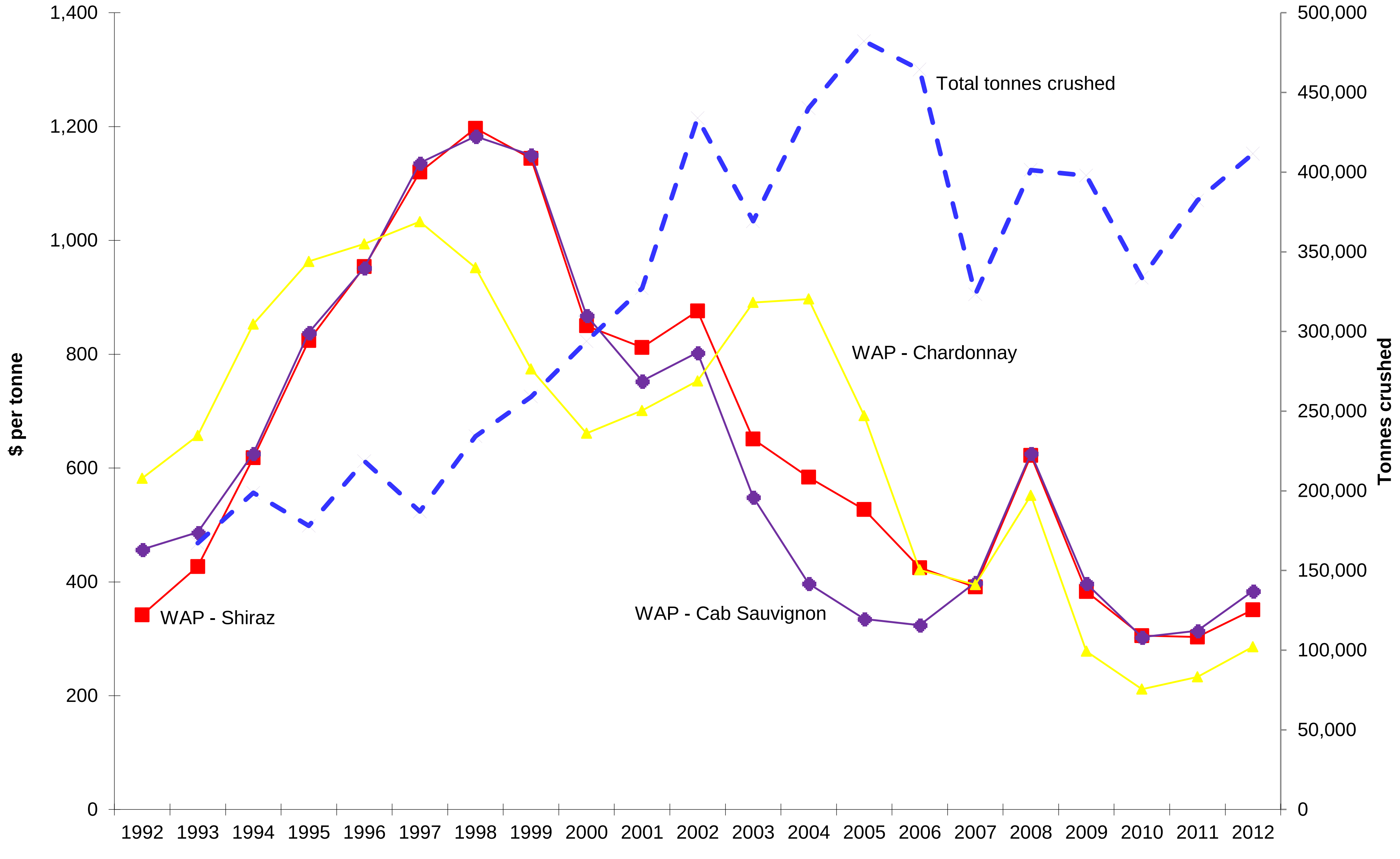
Winegrape intake summary - vintage 2012

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
WHITE								
Canada Muscat	36			$19,811	$550	0	36	$19,811
Chardonnay	100,724	$153	$630	$28,794,820	$286	6,237	106,962	$30,577,911
Chenin Blanc	1,884	$190	$350	$437,063	$232	123	2,006	$465,519
Colombard	27,183	$150	$330	$6,032,268	$222	2,778	29,961	$6,648,832
Crouchen	27			$6,422	$240	107	134	$32,045
Doradillo	137			$27,650	$201	29	167	$33,545
Marsanne	38			$8,047	$210	0	38	$8,047
Muscadelle	1			$175	$350	51	52	$18,053
Muscat a Petit Grains Blanc	2,858	$380	$450	$1,156,999	$405	729	3,588	$1,452,176
Muscat Gordo Blanco	21,693	$250	$550	$8,855,385	$408	390	22,083	$9,014,590
Other White	1,017	$200	$800	$418,686	$412	161	1,177	$484,771
Palomino	46			$16,100	$350	2	48	$16,713
Pinot Gris	1,901	$300	$540	$773,690	$407	373	2,274	$925,572
Riesling	2,419	$220	$400	$828,208	$342	694	3,114	$1,065,949
Roussanne	4			$926	$210	0	4	$926
Sauvignon Blanc	11,397	$220	$478	$3,881,414	$341	3,289	14,686	$5,001,560
Semillon	5,417	$200	$446	$1,448,341	$267	2,378	7,794	$2,084,065
Sultana	355			$77,903	$219	0	355	$77,903
Taminga	108			$29,863	$276	0	108	$29,863
Traminer	1,987			$581,027	$292	697	2,684	$784,955
Verdelho	1,158	$200	$400	$265,272	$229	0	1,158	$265,272
Viognier	2,100	$200	$830	$706,105	$336	478	2,578	$866,967
Total White winegrapes	**182,490**			**$54,366,175**		**18,517**	**201,006**	**$59,875,044**
Total All winegrapes	**359,193**			**$118,466,984**		**52,336**	**411,529**	**$136,249,644**

1 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.

2 It is estimated that the non-response rate for Riverland is 0.5%.

Riverland **Historical Weighted Average Price vs tonnes crushed**



Riverland

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2009*	*2009*	*2010*	*2011*	*Total area*	*% planted in 2011*
White winegrapes						
Biancone (White Grenache)	8	0	0	0	8	*0%*
Chardonnay	4,632	1	1	4	4,638	*0%*
Chenin Blanc	99	0	0	0	99	*0%*
Colombard	818	0	2	0	820	*0%*
Doradillo	81	0	0	0	81	*0%*
Muscadelle (Tokay)	13	0	0	0	13	*0%*
Muscat A Petit Grains Blanc	126	7	3	4	140	*3%*
Muscat Gordo Blanco	1,075	11	14	17	1,117	*2%*
Other white	53	2	1	3	58	*4%*
Palomino	11	0	0	0	11	*0%*
Pinot Gris	52	3	18	1	73	*1%*
Riesling	224	0	0	0	224	*0%*
Sauvignon Blanc	483	2	1	13	498	*3%*
Semillon	366	0	0	0	366	*0%*
Sultana	190	0	0	2	193	*1%*
Traminer (Gewurztraminer)	90	0	1	0	91	*0%*
Trebbiano	20	0	0	0	20	*0%*
Verdelho	109	0	0	0	109	*0%*
Vermentino	2	17	3	1	22	*4%*
Viognier	150	3	0	0	153	*0%*
Total white varieties	**8,603**	**45**	**44**	**43**	**8,735**	***0%***

Riverland

Current plantings by variety and year planted

Variety	Current area in hectares Pre-2009	2009	2010	2011	Total area	% planted in 2011
Red winegrapes						
Cabernet Sauvignon	3,112	38	6	20	3,176	*1%*
Grenache	367	4	4	0	375	*0%*
Malbec	25	1	0	0	26	*0%*
Mataro (Mourvedre)	254	0	0	0	255	*0%*
Merlot	1,161	4	0	1	1,166	*0%*
Other red	51	7	7	1	66	*2%*
Petit Verdot	503	0	0	0	503	*0%*
Pinot Noir	295	1	0	9	305	*3%*
Rubired	12	0	0	0	12	*0%*
Ruby Cabernet	155	1	0	0	156	*0%*
Sangiovese	15	0	0	0	15	*0%*
Shiraz	5,328	45	14	19	5,407	*0%*
Tarrango	5	0	0	0	5	*0%*
Tempranillo	36	2	3	0	41	*0%*
Total red varieties	**11,319**	**103**	**34**	**50**	**11,506**	***0%***
Unknown variety	231	0	0	1	232	*0%*
Rootstock block	30	0	0	0	30	*0%*
Tablegrapes - red	44	0	0	1	45	*1%*
Tablegrapes - white	24	0	0	0	24	*2%*
Multipurpose grapes - red	72	2	3	0	77	*0%*
Multipurpose grapes - white	31	0	0	0	31	*0%*
Total all varieties	**20,353**	**150**	**81**	**95**	**20,679**	***0%***

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

Variety	2013 Est Supply [1]	2013 Committed intake[2] *Winery grapes*	2013 *Contract purchases*	2013 *Total committed intake*	2015 Est Supply [1]	2015 Committed intake[2] *Winery grapes*	2015 *Contract purchases*	2015 *Total committed intake*	2017 Est Supply [1]	2017 Committed intake[2] *Winery grapes*	2017 *Contract purchases*	2017 *Total committed intake*
Red winegrapes												
Barbera	0	0	22	22	0	0	27	27	0	0	27	27
Cabernet Franc	0	25	5	30	0	25	5	30	0	25	5	30
Cabernet Sauvignon	56,753	12,093	47,959	60,053	56,990	12,278	46,166	58,444	56,990	12,280	45,746	58,026
Carignan	0	20	0	20	0	25	0	25	0	25	0	25
Grenache	7,824	88	2,950	3,038	7,866	91	2,088	2,179	7,866	98	2,099	2,197
Malbec	460	141	295	435	460	141	295	435	460	141	295	435
Mataro	4,579	3	2,564	2,567	4,582	4	2,146	2,150	4,582	4	2,092	2,096
Merlot	22,140	5,965	16,215	22,181	22,145	5,965	15,121	21,086	22,145	5,965	14,877	20,842
Muscat a Petit Grains Rouge / Rose	0	4	0	4	0	5	0	5	0	5	0	5
Nebbiolo	0	0	9	9	0	0	9	9	0	0	9	9
Other Red	5,928	301	1,169	1,470	6,038	346	1,052	1,398	6,038	346	864	1,210
Petit Verdot	10,052	3,379	5,545	8,924	10,052	3,379	4,571	7,951	10,052	3,379	4,527	7,906
Pinot Noir	5,921	1,131	5,801	6,933	6,011	1,157	5,538	6,694	6,011	1,157	4,551	5,708
Ruby Cabernet	3,119	111	567	678	3,119	111	434	545	3,119	111	434	545
Sangiovese	310	101	114	214	310	101	139	239	310	101	163	264
Shiraz	102,236	17,440	73,046	90,486	102,551	19,041	68,305	87,346	102,551	19,041	67,278	86,319
Tarrango	0	0	0	0	0	0	0	0	0	0	0	0
Tempranillo	786	13	318	331	813	149	272	420	813	209	109	318
Touriga	0	76	57	134	0	76	57	134	0	76	57	134
Zinfandel	0	0	2	2	0	0	2	2	0	0	2	2
Total red winegrapes	**220,108**	**40,892**	**156,638**	**197,529**	**220,936**	**42,893**	**146,227**	**189,121**	**220,936**	**42,963**	**143,136**	**186,099**

[1] *Supply forecast produced by PGIBSA based on the South Australian vineyard register*
[2] *A raising factor of 1.006 has been applied to committed intake to allow for non-respondents*

Riverland

Estimated supply and committed intake 2013 - 2017

Variety	2013 Est Supply [1]	2013 Committed intake[2] Winery grapes	2013 Committed intake[2] Contract purchases	2013 Committed intake[2] Total committed intake	2015 Est Supply [1]	2015 Committed intake[2] Winery grapes	2015 Committed intake[2] Contract purchases	2015 Committed intake[2] Total committed intake	2017 Est Supply [1]	2017 Committed intake[2] Winery grapes	2017 Committed intake[2] Contract purchases	2017 Committed intake[2] Total committed intake
White winegrapes												
Canada Muscat	0	0	50	50	0	0	50	50	0	0	50	50
Chardonnay	101,941	9,860	78,971	88,831	101,996	10,240	71,913	82,152	101,996	10,240	69,295	79,534
Chenin Blanc	2,474	121	1,967	2,088	2,474	121	1,563	1,684	2,474	121	1,563	1,684
Colombard	21,296	2,565	25,918	28,482	21,317	2,414	24,263	26,677	21,317	2,414	23,932	26,346
Crouchen	0	93	49	142	0	93	49	142	0	93	49	142
Doradillo	2,036	28	122	150	2,036	28	122	150	2,036	28	122	150
Marsanne	0	0	0	0	0	0	0	0	0	0	0	0
Muscadelle	260	31	1	31	260	31	1	31	260	31	1	31
Muscat a Petit Grains Blanc	3,357	746	3,232	3,978	3,442	750	3,645	4,395	3,442	754	3,270	4,024
Muscat Gordo Blanco	26,220	357	24,259	24,616	26,597	456	20,805	21,260	26,597	456	20,279	20,734
Other White	5,402	277	1,192	1,468	5,486	352	1,227	1,579	5,486	352	1,048	1,400
Palomino	210	0	82	82	210	0	82	82	210	0	0	0
Pedro Ximenes	0	0	0	0	0	0	15	15	0	0	30	30
Pinot Gris	1,279	377	1,878	2,255	1,462	377	2,044	2,421	1,462	377	2,044	2,421
Riesling	4,474	789	2,421	3,209	4,474	789	2,383	3,171	4,474	789	1,276	2,065
Roussanne	0	0	8	8	0	0	8	8	0	0	8	8
Sauvignon Blanc	12,125	3,314	10,554	13,868	12,292	3,339	10,093	13,432	12,292	3,339	10,093	13,432
Semillon	9,156	2,114	3,763	5,878	9,156	2,114	3,023	5,137	9,156	2,114	2,824	4,938
Sultana	4,581	0	793	793	4,607	0	793	793	4,607	0	793	793
Taminga	0	0	118	118	0	0	118	118	0	0	118	118
Traminer	2,267	704	1,855	2,559	2,277	704	1,855	2,559	2,277	704	757	1,461
Verdelho	2,725	0	1,006	1,006	2,725	0	624	624	2,725	0	624	624
Viognier	2,755	492	1,311	1,802	2,755	492	1,036	1,528	2,755	492	952	1,444
Total white winegrapes	**203,063**	**21,866**	**159,547**	**181,413**	**204,071**	**22,298**	**145,710**	**168,008**	**204,071**	**22,302**	**139,127**	**161,429**
All winegrapes	**423,171**	**62,758**	**316,185**	**378,943**	**425,007**	**65,192**	**291,937**	**357,129**	**425,007**	**65,266**	**282,263**	**347,528**

[1] *Supply forecast produced by PGIBSA based on the South Australian vineyard register*

[2] *A raising factor of 1.006 has been applied to committed intake to allow for non-respondents*