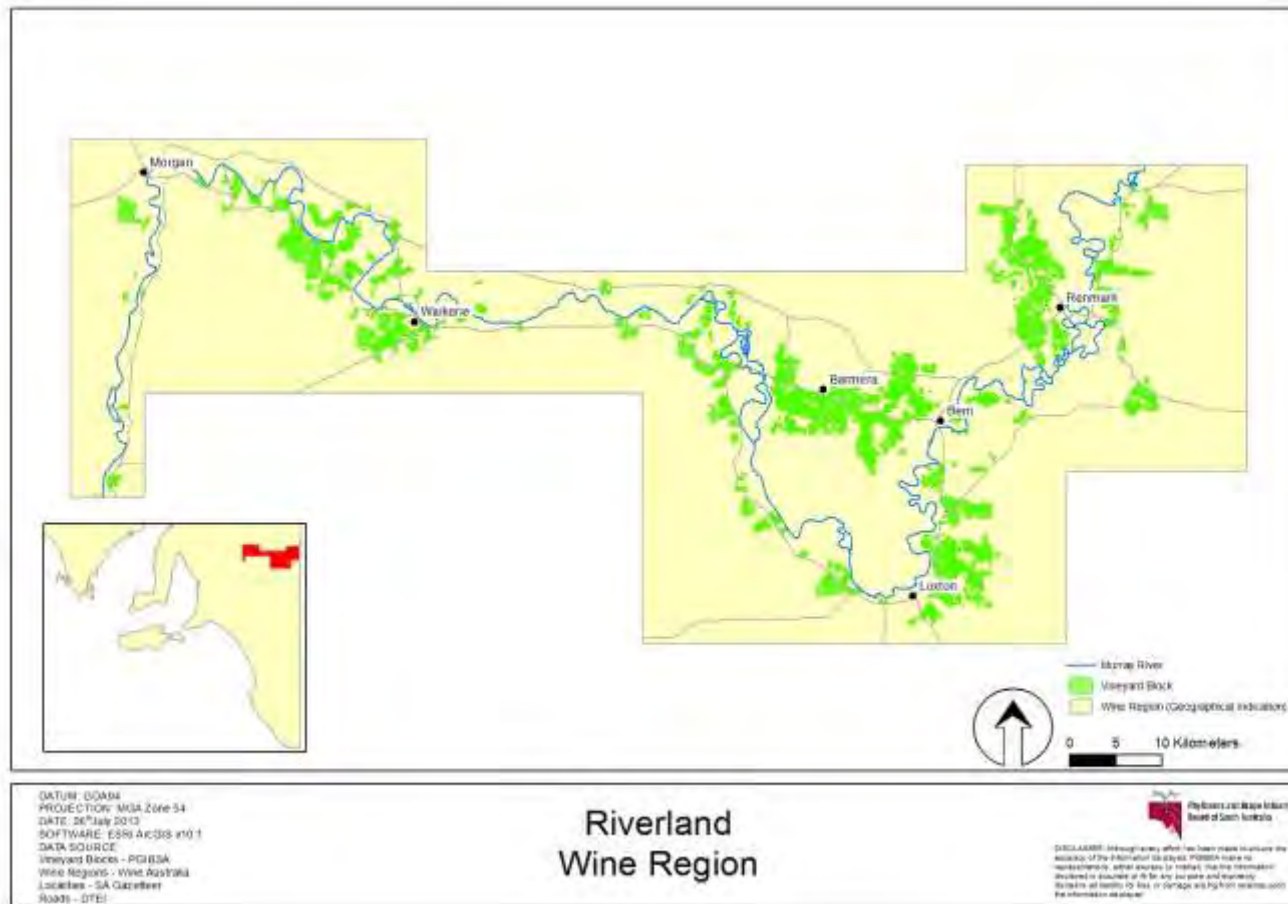


SA Winegrape Crush Survey Regional Summary Report - 2013

Riverland Wine Region



Riverland

Vintage overview

Vintage report

The growing season for vintage 2013 followed some quite cool nights in the winter of 2012 in the Riverland. It is thought that this may have caused some injury to the lower section of vine trunks. This was particularly evident in ungrafted Chardonnay which were very slow to develop after bud burst. Spring was much cooler than usual resulting in cooler soil temperatures. This in turn led to less root activity and less available nutrients. Vines on their own roots were the most affected.

Once things warmed up in late spring it was back to more normal conditions for the Riverland. The easy growing conditions were welcome but the very dry conditions underlined the importance of good irrigation practices with water demand the highest in recent history.

There were a couple of hot periods worth noting for this season. The first was at the end of November where a very hot day saw sulphur burn on developing berries. The burn was unusual in that burn still occurred on patches that had been sprayed several days earlier. The second period of note was a heat wave in early January. Growers who did not have sufficient moisture in their soil profile and capacity in their irrigation systems, experienced significant fruit burn and canopy defoliation.

Disease pressure was very low due to the very dry conditions. There was a very minor amount of powdery mildew found in the area, mainly on Chardonnay. Rainfall at the end of February provided some rot concerns for Gordo growers, however the threat was easily managed.

Overall quality of fruit was good this year. The quality level of the white varieties was excellent. The major red varieties were also of a high level however some of the earlier fruit was sweet before the flavours had developed sufficiently. The intake was very condensed this year with the reds maturing rapidly. Local processors were stretched to bring fruit in on time and make the most of the fruit's character.

The major varieties delivered average to above average yields this year. Merlot crops were strong while Cabernet Sauvignon was probably the most disappointing, probably because of cool winter and spring conditions.

Ashley Chabrel
Phylloxera and Grape Industry Board

Overview of vintage statistics

The harvest from the Riverland was 396,199 tonnes in 2013, down by 15,330 (3.7%) on the 2012 harvest on 411,529 tonnes. The total value of purchased grapes increased from \$136.2 million to \$137.3 million. The average purchase values for all varieties slightly increased – with Shiraz up by \$45 per tonne to \$396 per tonne and Cabernet Sauvignon up by \$18 per tonne to \$402 per tonne. Of the white varieties – Chardonnay is up by \$5 per tonne to \$291 per tonne and Colombard is up by \$8 per tonne to \$230 per tonne.

There were 129 hectares of new plantings in the Riverland in spring 2012 (including top-working and replacements) compared with 95 hectares in 2011. Of the new plantings, Muscat Gordo Blanco accounted for 29.5%, Cabernet Sauvignon 20.1% and Shiraz 12.4%. The total area planted to vines in the Riverland increased by 58 hectares compared with a decrease of 180 hectares in 2011.

The estimated production from the Riverland for 2014 is 423,100 tonnes, with the wineries' committed intake being 398,600 tonnes. This leaves around 24,500 tonnes (5.8%) of uncommitted fruit.

By 2018, the estimated production is 425,500 tonnes, of which 363,700 tonnes is already under contract or winery grown fruit. This leaves an estimated 61,800 tonnes (14.5%) yet to be contracted or is available on the open market.

Winegrape intake summary - vintage 2013

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	3			\$816	\$260	23	26	\$6,739
Cabernet Sauvignon	41,779	\$300	\$560	\$16,789,868	\$402	9,920	51,699	\$20,776,520
Carignan	0			\$0	\$0	32	32	\$12,409
Grenache	4,152	\$250	\$400	\$1,305,553	\$314	737	4,889	\$1,537,142
Malbec	190			\$56,976	\$300	146	336	\$100,722
Mataro	2,621	\$270	\$450	\$824,726	\$315	2	2,622	\$825,314
Merlot	18,128	\$325	\$510	\$7,234,557	\$399	7,435	25,564	\$10,201,819
Muscat A Petit Grains Rose	114			\$51,350	\$450	0	114	\$51,350
Other red	727	\$220	\$800	\$319,394	\$439	205	932	\$409,265
Petit Verdot	7,520	\$250	\$630	\$2,444,190	\$325	4,247	11,767	\$3,824,500
Pinot Noir	6,198	\$325	\$475	\$2,707,831	\$437	1,088	7,286	\$3,182,981
Ruby Cabernet	861	\$300	\$350	\$272,310	\$316	1,118	1,979	\$625,899
Sangiovese	148	\$220	\$300	\$35,374	\$239	397	545	\$130,411
Shiraz	76,497	\$315	\$830	\$30,315,558	\$396	16,541	93,038	\$36,870,862
Tarrango	92			\$27,714	\$300	0	92	\$27,714
Tempranillo	277	\$290	\$500	\$118,495	\$427	3	280	\$119,777
Touriga	34			\$7,898	\$230	86	120	\$27,690
Zinfandel	2			\$506	\$220	0	2	\$506
Total Red winegrapes	159,345			\$62,513,114		41,979	201,324	\$78,731,619

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

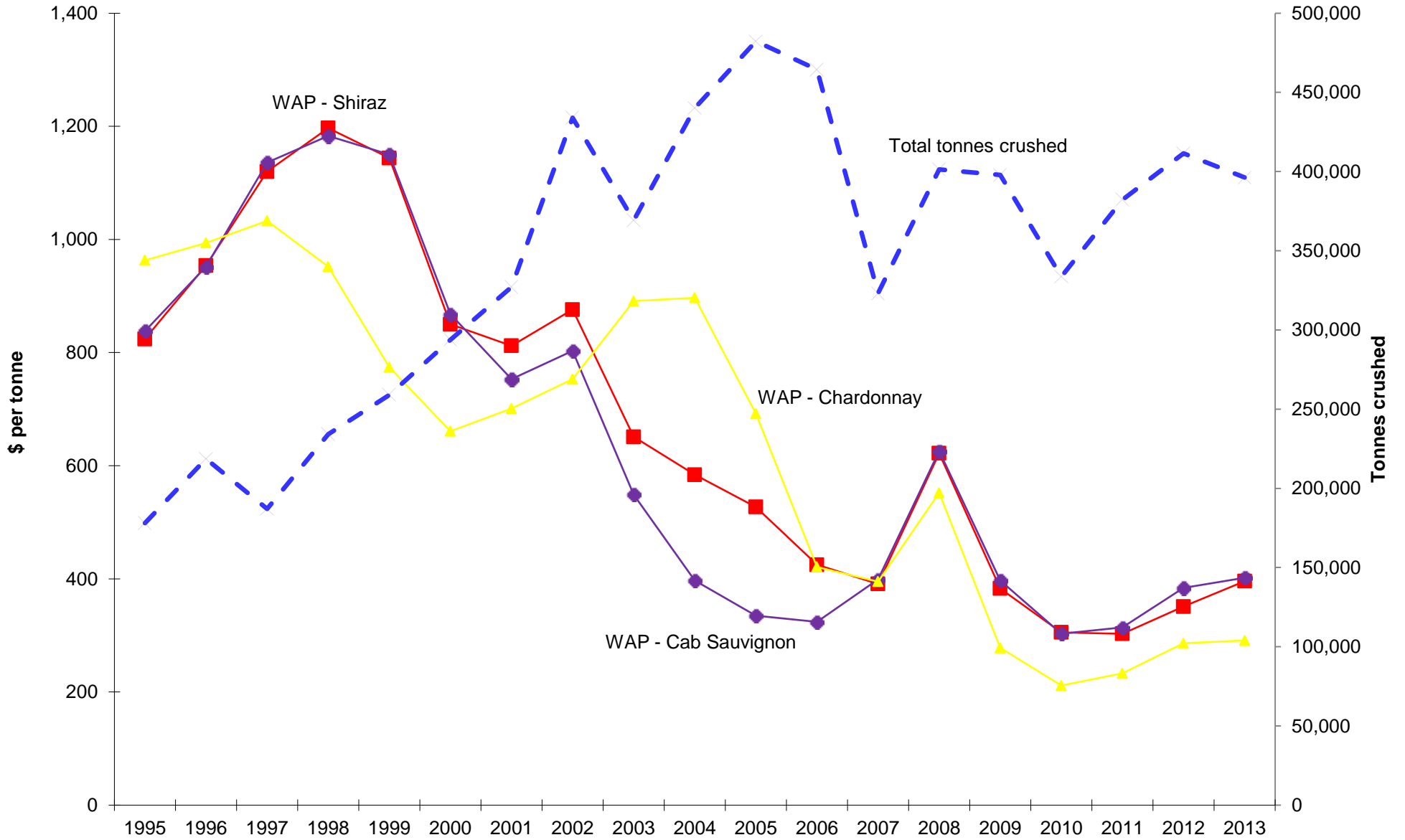
Winegrape intake summary - vintage 2013

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								
Chardonnay	91,478	\$250	\$630	\$26,612,755	\$291	9,712	101,190	\$29,438,217
Chenin Blanc	1,797	\$190	\$400	\$406,367	\$226	38	1,835	\$414,954
Colombard	24,248	\$190	\$330	\$5,577,551	\$230	2,484	26,733	\$6,148,993
Crouchen	36			\$8,755	\$240	64	100	\$24,096
Doradillo	128			\$27,050	\$212	362	490	\$103,790
Marsanne	34			\$7,220	\$210	0	34	\$7,220
Muscadelle	0			\$0	\$0	38	38	\$11,413
Muscat A Petit Grains Blanc	2,894	\$300	\$550	\$1,111,539	\$384	354	3,248	\$1,247,611
Muscat Gordo Blanco	21,934	\$238	\$550	\$8,356,071	\$381	3,310	25,244	\$9,617,248
Other white	901	\$220	\$800	\$432,546	\$480	973	1,873	\$899,732
Palomino	0			\$0	\$0	1	1	\$299
Pinot Gris	917	\$300	\$500	\$396,410	\$432	409	1,326	\$573,416
Riesling	2,222	\$240	\$375	\$781,271	\$352	808	3,031	\$1,065,352
Roussanne	5			\$1,078	\$220	0	5	\$1,078
Sauvignon Blanc	10,703	\$230	\$410	\$3,453,255	\$323	3,373	14,076	\$4,541,584
Semillon	5,293	\$220	\$446	\$1,448,767	\$274	4,626	9,919	\$2,715,149
Sultana	278	\$200	\$280	\$60,756	\$218	0	278	\$60,756
Taminga	39			\$9,030	\$230	0	39	\$9,030
Traminer	1,434			\$461,960	\$322	336	1,770	\$570,072
Verdelho	1,773	\$215	\$446	\$436,476	\$246	35	1,808	\$445,129
Viognier	1,446	\$200	\$882	\$542,402	\$375	392	1,838	\$689,355
Total White winegrapes	167,559			\$50,131,258		27,317	194,875	\$58,584,493
Grand Total All winegrapes	326,904			\$112,644,373		69,296	396,199	\$137,316,112

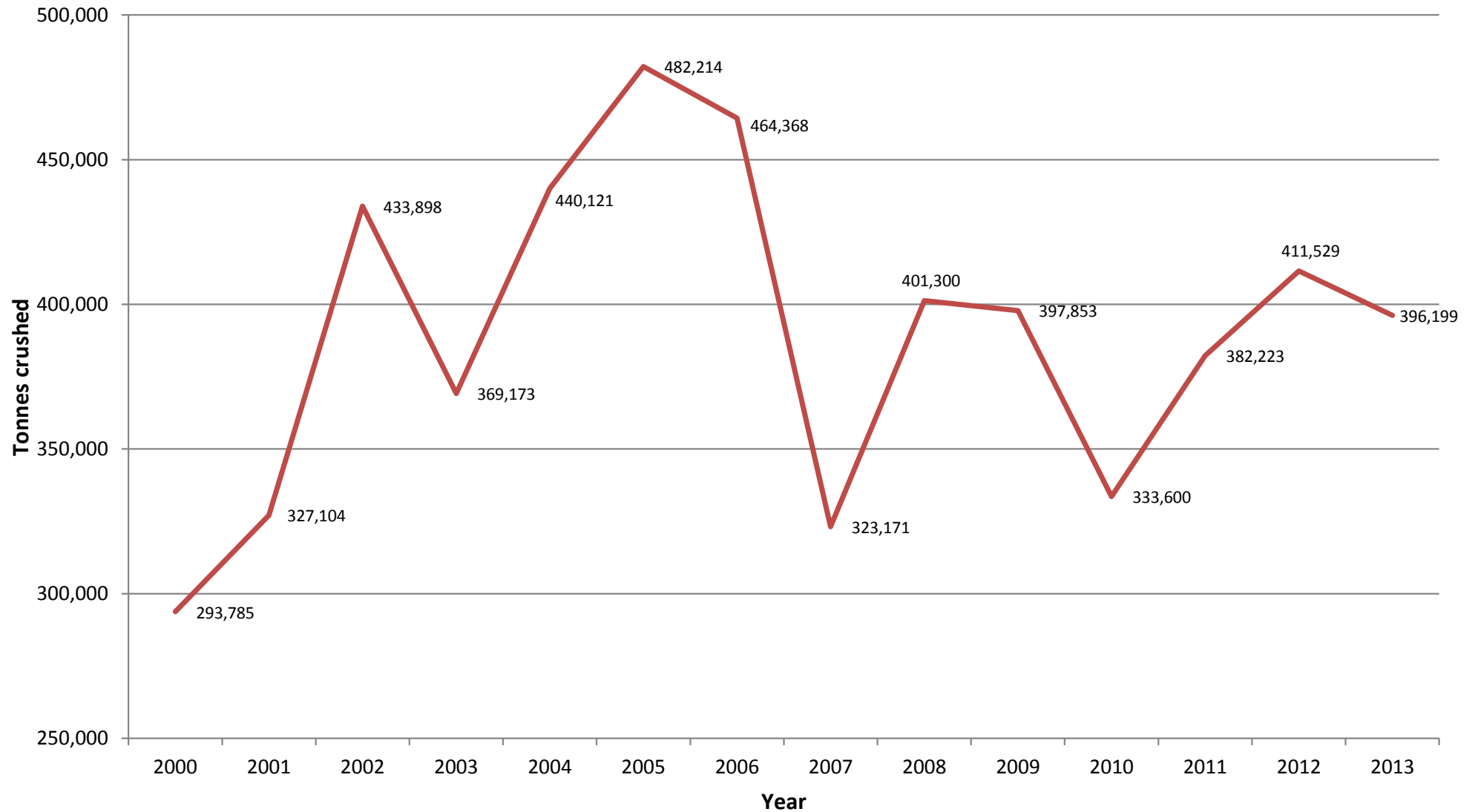
¹ Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.

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

Historical Weighted Average Price vs tonnes crushed



Vintage Riverland 2000 - 2013



Riverland

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2012
	Pre-2010	2010	2011	2012		
White winegrapes						
Biancone (White Grenache)	8	0	0	0	8	0%
Chardonnay	4,603	1	4	13	4,621	0%
Chenin Blanc	95	0	0	0	95	0%
Colombard	819	2	0	0	821	0%
Doradillo	78	0	0	0	78	0%
Muscadelle (Tokay)	12	0	0	0	12	0%
Muscat A Petit Grains Blanc	132	3	4	2	141	1%
Muscat Gordo Blanco	1,096	14	18	38	1,167	3%
Other White	51	1	3	0	55	0%
Palomino	10	0	0	0	10	0%
Pinot Gris	52	18	1	3	73	4%
Riesling	211	0	0	1	211	0%
Sauvignon Blanc	487	1	13	1	502	0%
Semillon	366	0	1	0	367	0%
Sultana	183	0	2	1	186	1%
Traminer (Gewurztraminer)	112	1	0	0	113	0%
Trebbiano	19	0	0	0	19	0%
Verdelho	108	0	0	0	109	0%
Vermentino	15	3	1	0	19	2%
Viognier	150	0	0	0	150	0%
Total white varieties	8,609	44	46	59	8,758	1%

Riverland

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2012
	Pre-2010	2010	2011	2012		
Red winegrapes						
Cabernet Sauvignon	3,144	6	20	26	3,197	1%
Grenache	364	2	0	1	367	0%
Malbec	25	0	0	0	25	0%
Mataro (Mourvedre)	248	0	0	0	248	0%
Merlot	1,182	0	0	14	1,197	1%
Other Red	52	7	2	3	63	5%
Petit Verdot	504	0	0	0	504	0%
Pinot Noir	293	0	9	1	303	0%
Rubired	12	0	0	4	15	24%
Ruby Cabernet	148	0	0	0	148	0%
Sangiovese	15	0	0	1	16	4%
Shiraz	5,369	14	19	16	5,419	0%
Tarrango	5	0	0	0	5	0%
Tempranillo	36	3	0	0	39	0%
Total red varieties	11,399	32	51	65	11,547	1%
Unknown variety	238	0	1	0	238	0%
Rootstock Block	23	0	0	2	25	6%
Table grapes - red	41	0	0	0	41	0%
Table grapes - white	22	0	1	2	25	9%
Multi-purpose red	68	3	0	0	72	0%
Multi-purpose white	30	0	0	1	31	5%
Total all varieties	20,429	79	99	129	20,737	1%

Riverland

Estimated supply and committed intake 2014 - 2018

Variety	2014				2016				2018			
	Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²		
		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake
Red winegrapes												
Cabernet Franc	9	30	5	35	10	30	5	35	10	30	5	35
Cabernet Sauvignon	56,888	13,411	45,984	59,395	57,308	13,512	43,361	56,872	57,308	13,512	42,664	56,176
Carignan	0	25	0	25	0	25	0	25	0	25	0	25
Grenache	7,691	725	3,119	3,844	7,701	725	2,539	3,264	7,701	725	2,539	3,264
Malbec	459	116	295	411	459	116	295	411	459	116	295	411
Mataro	4,472	5	2,902	2,907	4,472	8	3,052	3,060	4,472	8	3,052	3,060
Merlot	22,471	7,497	16,356	23,853	22,607	7,497	15,196	22,693	22,607	7,497	14,020	21,517
Muscat A Petit Grains Rose	0	0	104	104	0	0	104	104	0	0	118	118
Nebbiolo	0	0	4	4	0	0	4	4	0	0	4	4
Other red	5,738	165	567	731	5,829	169	763	932	5,829	169	731	899
Petit Verdot	10,071	4,560	6,494	11,054	10,071	4,560	5,877	10,437	10,071	4,560	5,041	9,602
Pinot Noir	5,954	1,258	6,717	7,975	6,054	1,258	6,419	7,677	6,054	1,258	5,429	6,687
Ruby Cabernet	2,965	1,238	681	1,919	2,965	1,238	525	1,764	2,965	1,238	525	1,764
Sangiovese	308	364	59	423	314	365	109	474	314	365	109	474
Shiraz	102,475	19,941	73,392	93,333	102,808	21,100	67,500	88,600	102,808	21,100	65,474	86,574
Tempranillo	777	71	355	427	781	203	347	551	781	203	355	559
Touriga	0	66	57	124	0	66	57	124	0	66	57	124
Zinfandel	0	0	2	2	0	0	2	2	0	0	2	2
Total red winegrapes	220,276	49,474	157,092	206,566	221,378	50,874	146,155	197,029	221,378	50,874	140,422	191,296

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

² A raising factor of 1.007 has been applied to committed intake to allow for non-respondents

Riverland

Estimated supply and committed intake 2014 - 2018

Variety	2014				2016				2018			
	Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²		
		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake
White winegrapes												
Chardonnay	101,335	10,533	87,039	97,572	101,523	11,077	80,275	91,352	101,523	11,077	78,458	89,535
Chenin Blanc	2,370	0	1,734	1,734	2,370	0	1,726	1,726	2,370	0	1,726	1,726
Colombard	21,344	2,456	23,927	26,383	21,344	2,456	22,438	24,894	21,344	2,456	22,357	24,813
Crouchen	0	93	0	93	0	93	0	93	0	93	0	93
Doradillo	0	427	122	549	0	427	122	549	0	427	122	549
Muscadelle	0	31	0	31	0	31	0	31	0	31	0	31
Muscat A Petit Grains Blanc	3,422	344	3,535	3,880	3,499	346	3,911	4,257	3,499	347	3,616	3,963
Muscat Gordo Blanco	26,868	2,789	22,994	25,782	27,546	1,885	19,051	20,935	27,546	2,793	18,462	21,254
Other white	7,659	475	1,206	1,681	7,751	325	1,182	1,507	7,751	325	1,132	1,457
Palomino	0	1	0	1	0	1	0	1	0	1	0	1
Pedro Ximenes	0	0	0	0	0	0	30	30	0	0	30	30
Pinot Gris	1,401	453	1,375	1,828	1,436	453	1,275	1,728	1,436	453	1,275	1,728
Riesling	4,210	890	2,408	3,298	4,218	890	2,413	3,303	4,218	890	1,306	2,196
Roussanne	0	0	8	8	0	0	8	8	0	0	8	8
Sauvignon Blanc	12,363	3,211	11,171	14,383	12,530	3,211	10,168	13,379	12,530	3,211	10,168	13,379
Semillon	9,162	3,459	4,702	8,161	9,172	3,459	3,579	7,038	9,172	3,459	3,185	6,644
Sultana	4,416	0	774	774	4,450	0	754	754	4,450	0	754	754
Taminga	0	0	67	67	0	0	67	67	0	0	67	67
Traminer	2,828	302	1,856	2,158	2,828	302	1,856	2,158	2,828	302	758	1,060
Verdelho	2,711	0	1,791	1,791	2,715	0	1,622	1,622	2,715	0	1,622	1,622
Viognier	2,700	492	1,356	1,848	2,700	492	1,026	1,518	2,700	492	1,026	1,518
Total white winegrapes	202,789	25,956	166,066	192,022	204,081	25,448	151,503	176,951	204,081	26,357	146,071	172,428
All winegrapes	423,065	75,430	323,159	398,589	425,459	76,321	297,659	373,980	425,459	77,230	286,494	363,724

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

² A raising factor of 1.007 has been applied to committed intake to allow for non-respondents