



SA Winegrape Crush Survey Regional Summary Report – 2016

Adelaide Plains Wine Region

DATUM: GDA84
 PROJECTION: MGA Zone 54
 DATE: 28th July 2013
 SOFTWARE: ESRI ArcGIS v10.4
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia
 Localities - SA Gazetteer
 Road - DPTI

Adelaide Plains Wine Region



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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 90%; however, individual regions may vary. 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 2016).

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. Therefore the average price should not be compared directly with an individual grower's arrangement. 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.

PLANTING DATA

Source of planting data tables

Planting data is not collected by the 2016 Australian Wine Sector Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia (formerly the Phylloxera and Grape Industry Board of South Australia).

Vinehealth Australia 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 Vinehealth Australia, and to report details of their plantings on an annual basis. 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 2016 and include all plantings from the 2015 planting season.
2. 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 2016 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 a slight error in totals or percentages.

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Vintage report

Winter/spring in 2015 was generally drier than average, leaving the sub surface water levels lower than desired. Many vineyards started irrigating earlier than in previous years. This was compounded by a mild spring.

Pre harvest weather was on the whole very good. The warm early season led to early ripening of the vineyards, with vintage starting approx. 10 days earlier than in 2015. A couple of hot spells (that didn't last too long), came early enough to have little effect on the ripening patterns of the fruit. The cool nights this year were very beneficial, keeping the natural acidity of the grapes high, and reducing levels of water stress that can be common in this region.

Yields of most varieties were (generally) slightly above what we would expect from each block. Cabernet Sauvignon was lower than usual, with many blocks having spindly bunches, and very small berries (The wines turned quite deeply coloured and dense).

All varieties (reds and whites) this season were generally of above average quality. Ripe flavours developed at lower sugar levels, showing lovely fresh varietal fruit characters, retention of acidity, and deep vibrant colours in the reds. Standouts this year were Shiraz, and surprisingly aromatic whites.

2016 was the best all round vintage I have seen in the 10 years of working in this area. 2013 was as good in the red varieties, but the whites did not match up with 2016.

Tony Carapetis, Winemaker, Virgara Wines

Vintage overview

Overview of vintage statistics

A total of 4,396 tonnes of Adelaide Plains winegrapes were crushed in 2016, up from 3,091 tonnes in 2015 and similar to the 4,360 tonnes crushed in 2014.

The five year average crush from this region is 4,035 tonnes, implying that the 2016 yield overall was slightly above average. The minimum crush over the period was the 2015 vintage with the maximum crush of 4,458 tonnes recorded in 2012.

The total value of winegrapes increased to just over \$4 million. For most varieties the average price paid increased despite the increased tonnage. Mataro was the only reported variety to record a decrease, down by more than \$300 to \$1187 per tonne while Shiraz was up by \$159 to \$973 per tonne. All the major whites increased in average price – particularly Chardonnay, which was up by \$90 per tonne (a 15% increase) and Sauvignon Blanc, up \$74 (10%) to \$776 per tonne.

The price dispersion data shows that 96% of red varieties were purchased at between \$600 and \$1500, while only 4% were purchased at over \$1500. However, this year, none of the red varieties were purchased at below \$600 per tonne compared with 2015 when 26% of fruit was purchased below \$600 per tonne. The distribution of prices also showed an improvement for the whites, with only 17% being purchased at below \$600 per tonne compared with 37% in 2015.

There were no new plantings of vines in 2015, but also no significant decrease in area – after over 100ha were removed in the previous 12 months.

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Winegrape intake summary – vintage 2016

Variety	Tonnes purchased	E¹ (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed²	Est total value ALL grapes
Cabernet Sauvignon	658	0%	0%	94%	6%	0%	\$616,403	\$936	18	677	\$633,443
Grenache	-	na	na	na	na	na	\$0		4	4	\$3,611
Mataro	87	1%	0%	40%	59%	0%	\$103,223	\$1,187	-	87	\$103,223
Merlot	158	0%	0%	100%	0%	0%	\$110,574	\$698	-	158	\$110,574
Shiraz	2,226	0%	0%	99%	1%	0%	\$2,165,986	\$973	50	2,276	\$2,214,359
Other red	95	0%	0%	100%	0%	0%	\$75,980	\$799	-	95	\$75,980
Red Total	3,225	0%	0%	96%	4%	0%	\$3,072,166	\$953	72	3,296	\$3,141,189
Chardonnay	231	0%	49%	51%	0%	0%	\$159,626	\$690	-	231	\$159,626
Colombard	-	na	na	na	na	na	\$0		93	93	\$75,420
Pinot Gris and Pinot Grigio	363	0%	0%	100%	0%	0%	\$349,562	\$962	-	363	\$349,562
Sauvignon Blanc	350	0%	0%	100%	0%	0%	\$271,450	\$776	-	350	\$271,450
Semillon	62	0%	100%	0%	0%	0%	\$32,701	\$530	-	62	\$32,701
White Total	1,006	0%	17%	83%	0%	0%	\$813,339	\$808	93	1,099	\$888,759
Grand Total	4,231	0%	4%	93%	3%	0%	\$3,885,505	\$918	165	4,396	\$4,029,948

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

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Current plantings by variety and year planted

Source: Vinehealth Australia

Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
Red winegrapes						
Cabernet Sauvignon	53	0	0	0	53	0%
Grenache	31	0	0	0	31	0%
Malbec	6	0	0	0	6	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	39	0	0	0	39	0%
Other Red	11	0	0	0	11	0%
Pinot Noir	16	0	0	0	16	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	197	1	0	0	198	0%
Tempranillo	2	0	0	0	2	0%
Total red varieties	370	1	0	0	371	0%
White winegrapes						
Chardonnay	28	0	0	0	28	0%
Chenin Blanc	5	0	0	0	5	0%
Colombard	9	0	0	0	9	0%
Other White	3	1	0	0	4	0%
Pinot Gris	26	0	0	0	26	0%
Riesling	13	0	0	0	13	0%
Sauvignon Blanc	26	0	0	0	26	0%
Semillon	5	0	0	0	5	0%
Total white varieties	115	1	0	0	116	0%
Unknown variety	28	0	0	0	28	0%
Total all varieties	513	2	0	0	515	0%