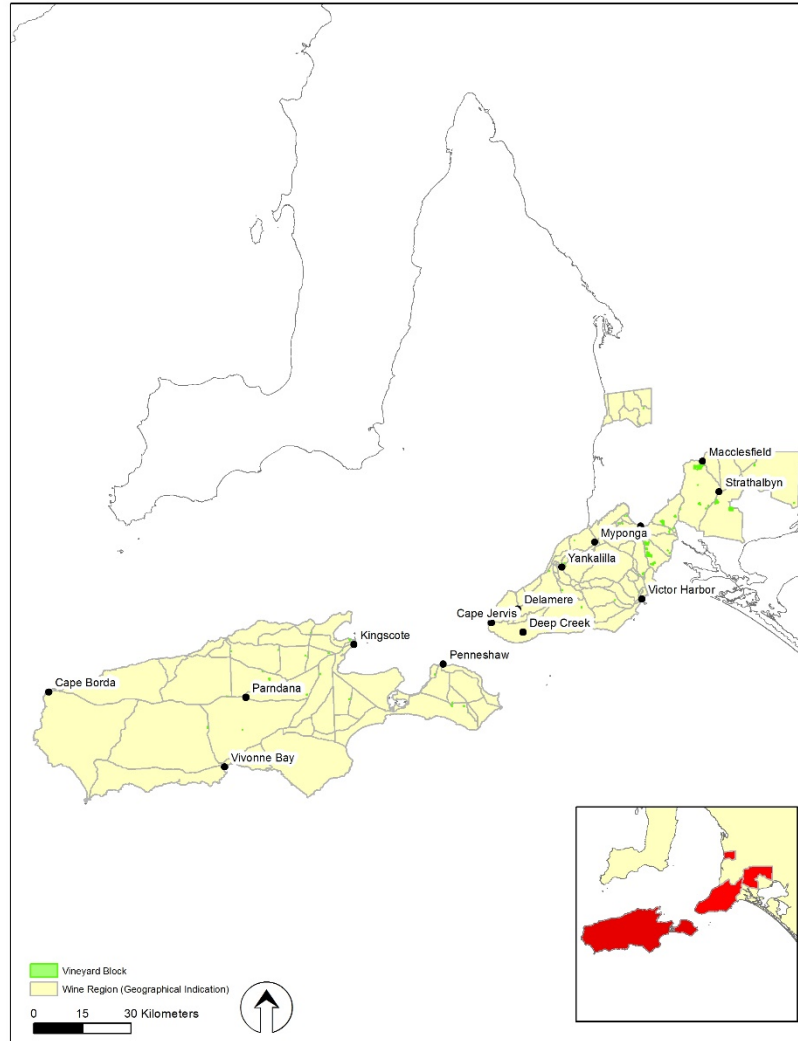



# SA Winegrape Crush Survey Regional Summary Report – 2016

## Fleurieu Zone (other) Wine Region



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

**Southern Fleurieu, Kangaroo Island  
Wine Regions and Fleurieu other**

  
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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.

## FLEURIEU ZONE (OTHER)

*Fleurieu zone (other) includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings that are in the Fleurieu zone but outside the larger GI regions of Currency Creek, McLaren Vale and Langhorne Creek. The total area of vines included in this definition is 949 hectares.*

## Vintage overview

### *Overview of vintage statistics*

The harvest from the Fleurieu zone (other) region was 3,083 tonnes in 2016, approximately 500 tonnes less than the 2015 crush.

Over the past five years, the average crush for this region is 3,159 tonnes implying that the 2016 yields were very close to average. The minimum crush over the period was 2,293 tonnes in 2014 and the highest was the 2015 crush of 3,603 tonnes.

The total estimated value of grapes from these regions decreased slightly from \$2.8 million to \$2.6 million but the average purchase value across all fruit increased from \$782 to \$852 per tonne. The average purchase price for Shiraz increased by \$208 to \$1,079 per tonne and Chardonnay increased by \$52 from \$564 to \$616 per tonne.

The price dispersion data shows that 88% of red tonnages and 59% 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 – vintage 2016**

Variety	Tonnes purchased	E (less than <sup>1</sup> \$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 crushed <sup>2</sup>	Est total value ALL grapes
Cabernet Franc	-	na	na	na	na	na	\$0		14	14	\$15,264
Cabernet Sauvignon	205	0%	0%	83%	6%	11%	\$284,993	\$1,393	8	212	\$295,736
Durif	-	na	na	na	na	na	\$0		1	1	\$1,122
Merlot	64	4%	0%	96%	0%	0%	\$45,753	\$720	5	69	\$49,583
Sangiovese	-	na	na	na	na	na	\$0		12	12	\$13,356
Shiraz	723	1%	0%	89%	4%	6%	\$779,770	\$1,079	76	799	\$861,918
Tempranillo	-	na	na	na	na	na	\$0		3	3	\$3,816
Other red	2	na	na	na	na	na	\$3,600	\$1,800	5	7	\$12,960
<b>Red Total</b>	<b>993</b>	<b>1%</b>	<b>0%</b>	<b>88%</b>	<b>4%</b>	<b>7%</b>	<b>\$1,114,115</b>	<b>\$1,122</b>	<b>124</b>	<b>1,117</b>	<b>\$1,253,756</b>
Chardonnay	640	0%	78%	22%	0%	0%	\$393,781	\$616	3	642	\$395,320
Sauvignon Blanc	371	0%	17%	82%	2%	0%	\$251,009	\$676	174	545	\$368,470
Viognier	-	na	na	na	na	na	\$0		1	1	\$683
Other white	588	0%	13%	84%	2%	0%	\$448,105	\$762	189	778	\$592,286
<b>White Total</b>	<b>1,599</b>	<b>0%</b>	<b>40%</b>	<b>59%</b>	<b>1%</b>	<b>0%</b>	<b>\$1,092,895</b>	<b>\$683</b>	<b>367</b>	<b>1,966</b>	<b>\$1,356,761</b>
<b>Grand Total</b>	<b>2,592</b>	<b>0%</b>	<b>25%</b>	<b>70%</b>	<b>2%</b>	<b>3%</b>	<b>\$2,207,011</b>	<b>\$852</b>	<b>491</b>	<b>3,083</b>	<b>\$2,610,517</b>

*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*

**FLEURIEU ZONE (OTHER)**

**Current plantings by variety and year planted**

*Source: Vinehealth Australia*

Southern Fleurieu Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
<b>Red varieties</b>						
Cabernet Sauvignon	72	0	0	0	72	0%
Merlot	35	0	0	0	35	0%
Other Red	6	0	0	0	6	0%
Pinot Noir	29	0	0	0	29	0%
Shiraz	119	6	0	0	124	0%
<b>White varieties</b>						
Chardonnay	92	0	0	0	92	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%
<b>Total all varieties</b>	<b>490</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>496</b>	<b>0%</b>

**FLEURIEU ZONE (OTHER)**

**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		
<b>Kangaroo Island</b>						
<b>Red varieties</b>						
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	49	0	0	0	49	0%
<b>White varieties</b>						
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%
<b>Total all varieties</b>	<b>135</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>135</b>	<b>0%</b>

Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
<b>Fleurieu zone - other</b>						
<b>Red varieties</b>						
Cabernet Sauvignon	37	0	0	0	37	0%
Other Red	21	0	1	0	21	0%
Shiraz	124	4	0	0	128	0%
<b>White varieties</b>						
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	34	0	0	0	34	0%
<b>Total all varieties</b>	<b>311</b>	<b>4</b>	<b>1</b>	<b>0</b>	<b>315</b>	<b>0%</b>