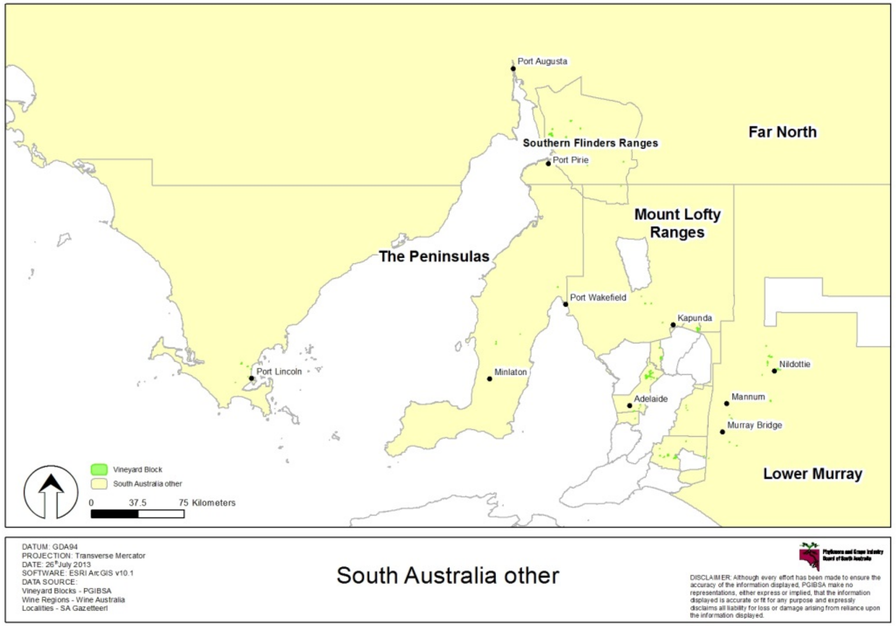

SA Winegrape Crush Survey

Regional Summary Report – 2015

South Australia (Other)

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 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 (May 2015).

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 2015 Australian Wine Sector Survey. 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 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 the Board.

For more information on registration of vineyards, please contact the Phylloxera and Grape Industry Board office on (08) 8273 0550.

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2015 and include all plantings from the 2014 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 2015 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.

SOUTH AUSTRALIA (OTHER)

South Australia (other) includes the GI region of Southern Flinders Ranges, the Peninsulas zone, and the vineyards in Mount Lofty Ranges (other) and Lower Murray zone (other) – see map on cover page. The total area of vines included in this definition is 1,029 hectares.

Vintage overview

Overview of vintage statistics

The harvest from South Australia (other) was 4,029 tonnes in 2015, compared with 3,206 tonnes in 2014. However, it may be that this is at least partly attributable to the change in methodology and difference in the classification of fruit by region. There was a jump from 128 tonnes to 1,250 tonnes in Mount Lofty Ranges (other).

The Southern Flinders Ranges had an increase of 42% in crush and the Peninsulas had a decrease of 48%.

The total value of fruit from these vineyards is estimated at just under $3 million. The average purchase values for Cabernet Sauvignon and Shiraz was higher, while Chardonnay decreased. However, once again this may be attributable at least in part to a change in the mix of fruit included in this group.

The price dispersion data shows that 54% of red tonnages were purchased at between $600 and $1500 per tonne and 42% at below $600, while for the whites, 11% were purchased between $600 and $1500 per tonne and 89% below $600.

Over the past five years, the average crush was 3,854 tonnes, implying that 2015 yields were up on average. The smallest vintage was 2,942 tonnes recorded in 2013 while the largest was 4,689 tonnes in 2011.

There were very small net decreases in planted area in each of the regions included in South Australia (other), resulting in a total net decrease of 14 hectares.

SOUTH AUSTRALIA (OTHER) — Winegrape intake summary – vintage 2015

Variety	Tonnes purchased	E (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 crushed[2]	Est total value ALL grapes
Cabernet Sauvignon	757	40%	13%	47%	0%	0%	$449,180	$593	42	799	$473,915
Grenache	23	na	na	na	na	na	$8,096	$350	-	23	$8,096
Mataro	20	0%	50%	50%	0%	0%	$11,200	$550	-	20	$11,200
Merlot	162	15%	31%	54%	0%	0%	$112,613	$694	-	162	$112,613
Petit Verdot	24	0%	0%	100%	0%	0%	$18,522	$758	-	24	$18,522
Sangiovese	18	na	na	na	na	na	$13,485	$750	-	18	$13,485
Shiraz	1,968	13%	26%	56%	5%	0%	$1,811,900	$921	265	2,233	$2,055,723
Tempranillo	7	na	na	na	na	na	$5,520	$750	-	7	$5,520
Other red	16	0%	0%	69%	31%	0%	$15,540	$979	-	16	$15,540
Red Total	2,997	19%	23%	54%	3%	0%	$2,446,055	$816	307	3,303	$2,714,613
Chardonnay	338	100%	0%	0%	0%	0%	$86,536	$256	-	338	$86,536
Colombard	95	na	na	na	na	na	$19,541	$205	-	95	$19,541
Palomino & Pedro Ximenes	84	0%	100%	0%	0%	0%	$29,526	$350	-	84	$29,526
Pinot Gris and Pinot Grigio	138	na	na	na	na	na	$95,009	$690	-	138	$95,009
Sauvignon Blanc	67	na	na	na	na	na	$22,183	$330	-	67	$22,183
Viognier	3	na	na	na	na	na	$4,077	$1,350	-	3	$4,077
White Total	725	60%	29%	11%	0%	0%	$256,871	$354	-	725	$256,871
Grand Total	3,722	27%	24%	46%	3%	0%	$2,702,926	$726	307	4,029	$2,971,484

1 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

SOUTH AUSTRALIA (OTHER)

Current plantings by variety and year planted

Current area in hectares

Lower Murray zone - other

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Sauvignon	73	0	0	0	73	0%
Merlot	16	0	0	0	16	0%
Other Red	25	0	0	0	25	0%
Petit Verdot	16	0	0	0	16	0%
Shiraz	138	1	0	0	139	0%
Total red varieties	268	1	0	0	269	0%
White winegrapes						
Chardonnay	85	0	0	0	85	0%
Colombard	16	0	0	0	16	0%
Other White	28	0	0	0	28	0%
Riesling	13	0	0	0	13	0%
Sauvignon Blanc	11	0	0	0	12	0%
Total white varieties	**153**	**0**	**0**	**0**	**154**	**0%**
Unknown variety	14	0	0	0	14	0%
Total all varieties	**435**	**2**	**0**	**0**	**437**	**0%**

Southern Flinders Ranges

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Sauvignon	23	0	0	0	23	0%
Merlot	6	0	0	0	6	0%
Other Red	3	0	0	0	3	0%
Shiraz	138	0	0	0	138	0%
Total red varieties	**170**	**0**	**0**	**0**	**170**	**0%**
Total white varieties	**1**	**0**	**0**	**0**	**1**	**0%**
Total all varieties	**171**	**0**	**0**	**0**	**171**	**0%**

Mount Lofty Ranges zone - other

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Sauvignon	71	0	3	0	74	0%
Merlot	11	0	0	0	11	0%
Other Red	21	0	3	0	24	0%
Petit Verdot	6	0	0	0	6	0%
Sangiovese	12	0	0	0	12	0%
Shiraz	177	6	6	5	194	3%
Total red varieties	**298**	**6**	**12**	**5**	**321**	**2%**
White winegrapes						
Chardonnay	4	0	0	0	4	0%
Other White	10	0	0	0	10	0%
Riesling	5	0	0	0	5	0%
Semillon	1	0	0	0	1	0%
Total white varieties	**21**	**0**	**0**	**0**	**21**	**0%**
Germplasm	4	0	0	0	4	0%
Unknown variety	4	0	0	0	4	0%
Total all varieties	**327**	**6**	**12**	**5**	**350**	**1%**

The Peninsulas

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	0%
Other Red	3	0	0	0	3	0%
Shiraz	12	0	0	0	12	0%
Total red varieties	**24**	**0**	**0**	**0**	**24**	**0%**
Total white varieties	**9**	**0**	**0**	**0**	**10**	**5%**
Unknown	37	0	0	0	37	0%
Total all varieties	**71**	**0**	**0**	**0**	**71**	**1%**

Source: Phylloxera and Grape Industry Board of South Australia