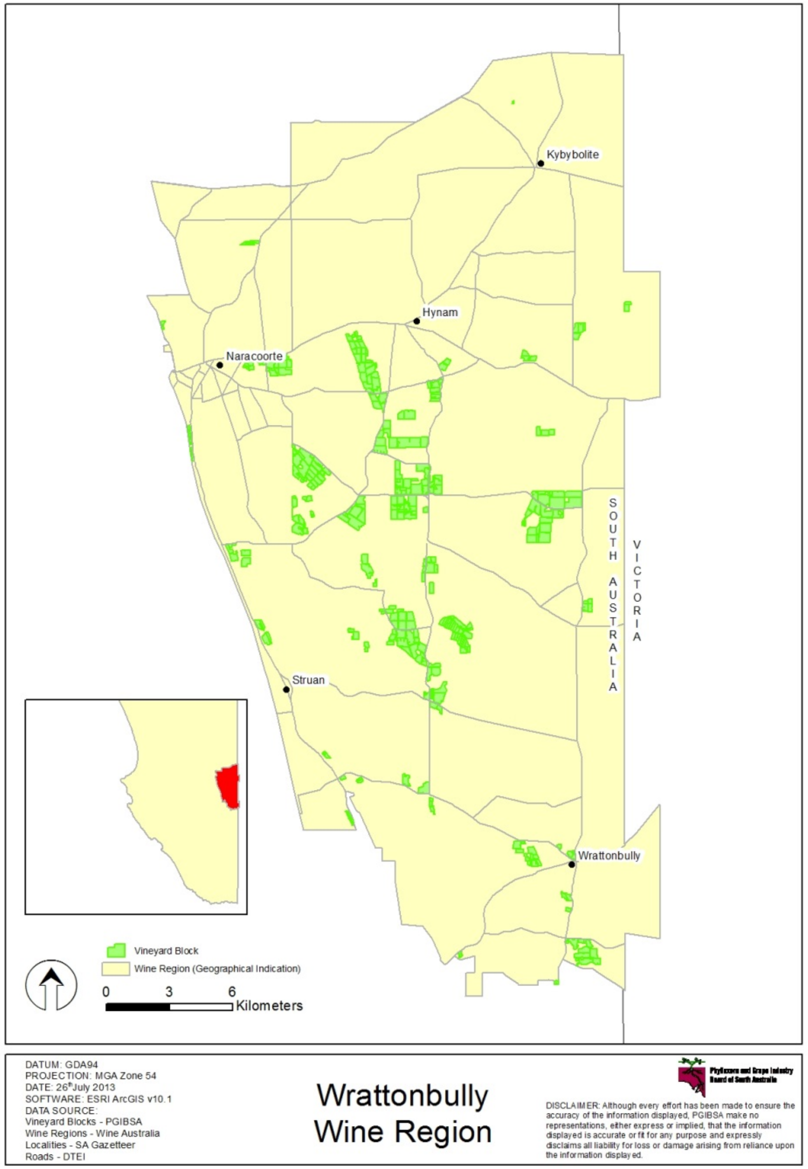

SA Winegrape Crush Survey

Regional Summary Report – 2015

Wrattonbully Wine Region

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.

WRATTONBULLY

Vintage overview

Vintage report

The 14 -15 season began with strong early winter rains filling the soil profile, however, from Spring onward until the early part of January, rainfall was well below average.

In mid-January approximately 80mm fell, providing welcome relief. This was perfect timing for the vineyard as it was early enough to avoid any botrytis risk and too late for any significant mildew risks.

January began with a couple of days of plus 40 degrees, but subsequent temperatures to the end of February were mild with excellent ripening conditions. Veraison was equal to or earlier than ever recorded for Wrattonbully. This resulted in many whites and some red varieties experiencing the earliest start to vintage on record.

Throughout March, particularly cold nights (1.5°C below average) and cool days (2.1°C below average) slowed ripening of the late red varieties resulting in a fairly steady finish to vintage. The majority of the region's fruit came off prior to Easter.

Yields were below average across all varieties. Bunch numbers in a lot of cases were near normal; however bunch weights were significantly down on long term averages.

2015 has been an excellent vintage for white grapes with the standout varieties being Sauvignon Blanc, Riesling and Chardonnay. The vintage conditions also suited Viognier and Pinot Gris as full fruit expression of these varieties was achieved at lower alcohol levels.

The cooler conditions later in vintage allowed a more sedate pace to the harvest of the red grape varieties and winemakers were able to bring in the grapes at their leisure rather than be pushed by rapidly accumulating sugar. It has been an outstanding year for all red grapes, especially Cabernet Sauvignon and Shiraz.

Wrattonbully Wine Industries Association

Overview of vintage statistics

The harvest from Wrattonbully was 16,557 tonnes compared with 17,845 tonnes in 2014. The total value of grapes did not drop significantly, however, and average prices for most of the major varieties including Cabernet Sauvignon, Merlot, Shiraz and Pinot Gris increased.

The price dispersion data shows that 80% of red tonnages were purchased at between $600 and $1500 and 18% at above $1500, while for the whites, 86% was purchased between $600 and $1500 and 14% between $300 and $600.

Over the past five years, the average crush was 17,353 tonnes implying that 2015 yields were down on average. the smallest recent vintage was 14,105 tonnes in 2011 while the largest was 19,052 tonnes in 2013.

There was no change in the net area of vineyards in the region, although there were 10 hectares of Shiraz planted in 2014.

WRATTONBULLY **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	2,943	0%	0%	80%	17%	3%	$3,464,017	$1,177	2,682	5,624	$6,620,958
Malbec	20	0%	80%	2383%	578%	0%	$26,205	$1,296	1	21	$27,734
Merlot	615	0%	0%	1%	0%	0%	$613,064	$997	1,531	2,146	$2,139,671
Petit Verdot	3	na	na	na	na	na	$4,188	$1,200	20	23	$28,092
Pinot Noir	201	0%	73%	847%	141%	23%	$178,734	$891	443	644	$573,174
Sangiovese	-	na	na	na	na	na	$0		33	33	$36,614
Shiraz	2,176	0%	0%	1%	0%	0%	$2,222,164	$1,021	2,801	4,976	$5,082,861
Tempranillo	29	0%	0%	686%	0%	0%	$46,386	$1,586	5	34	$53,855
Red Total	5,986	0%	3%	80%	16%	2%	$6,554,759	$1,095	7,515	13,502	$14,562,960

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

WRATTONBULLY **Winegrape intake summary – vintage 2015**

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Chardonnay	799	0%	24%	76%	0%	0%	$601,495	$753	431	1,230	$925,619
Marsanne	-	na	na	na	na	na	$0		9	9	$7,169
Pinot Gris and Pinot Grigio	646	0%	0%	35%	0%	0%	$665,286	$1,031	542	1,188	$1,224,253
Riesling	-	na	na	na	na	na	$0		94	94	$78,012
Sauvignon Blanc	225	0%	0%	0%	0%	0%	$135,246	$601	172	397	$238,401
Semillon	35	na	na	na	na	na	$10,392	$300	31	65	$19,542
Traminer	4	na	na	na	na	na	$3,251	$825	-	4	$3,251
Viognier	12	na	na	na	na	na	$6,116	$525	47	58	$30,686
Other white	11	na	na	na	na	na	$7,420	$700	-	11	$7,420
White Total	1,731	0%	14%	86%	0%	0%	$1,429,206	$826	1,325	3,056	$2,534,353
Grand Total	7,717	0%	5%	81%	12%	2%	$7,983,964	$1,035	8,840	16,557	$17,097,312

1 Pricing grade's share of purchases for each variety

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WRATTONBULLY **Current plantings by variety and year planted**

Current area in hectares

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Sauvignon	1,200	0	5	0	1,205	0%
Malbec	5	0	0	2	7	29%
Merlot	291	0	0	0	291	0%
Other Red	9	0	0	0	9	4%
Petit Verdot	6	0	0	0	6	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	678	2	0	10	689	1%
Tempranillo	9	0	0	0	9	0%
Total red varieties	**2261**	**2**	**5**	**12**	**2280**	**1%**
White winegrapes						
Chardonnay	198	0	0	0	198	0%
Marsanne	2	0	0	0	2	0%
Pinot Gris	94	3	0	0	97	0%
Prosecco	5	0	0	0	5	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	57	0	1	0	58	0%
Semillon	5	0	0	0	5	0%
Viognier	6	0	0	0	6	0%
Total white varieties	**373**	**3**	**1**	**0**	**378**	**0%**
Unknown variety	22	0	0	0	22	0%
Total all varieties	**2656**	**5**	**6**	**12**	**2679**	**0%**

Source: Phylloxera and Grape Industry Board of South Australia