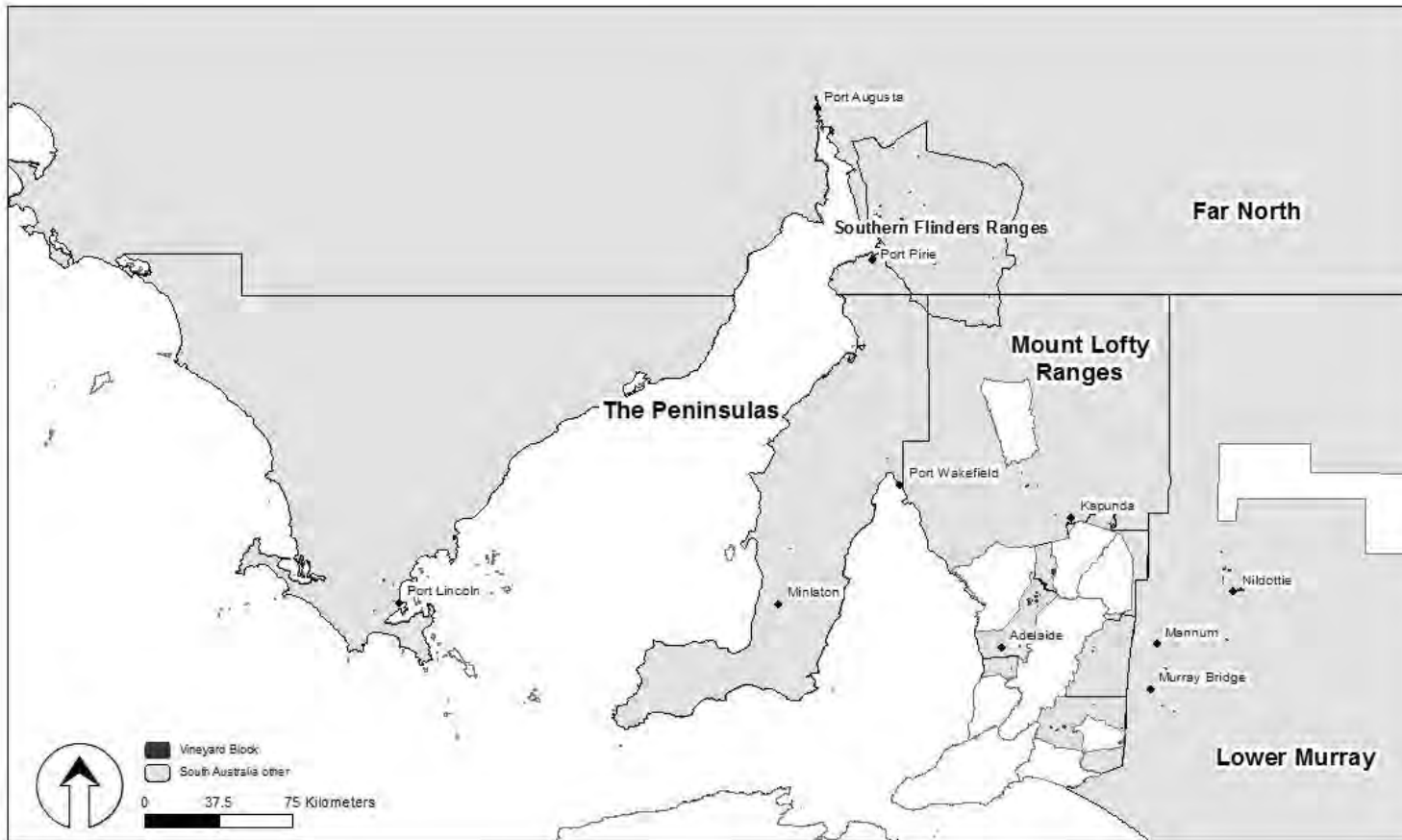


# South Australia – other

## Regional summary report 2011



DATUM: GDA84  
 PROJECTION: Transverse Mercator  
 DATE: 8<sup>th</sup> April 2011  
 SOFTWARE: ESRI ArcGIS v10  
 DATA SOURCE:  
 Vineyard Blocks - PG/BSA  
 Wine Regions - Wine Australia  
 Localities - SA Gazetteer!

### South Australia other

DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, PG/BSA make no representations, either express or implied, that the information displayed is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information displayed.

# 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 the Board's office.

### *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 that are known to source fruit from South Australian vineyards are included in the survey collection process. However, not all wineries submit a survey form - therefore the total tonnage reported may underestimate the true crush. An estimate of the non-response rate for each region is provided below each intake summary report. Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

### *Crop value data*

On the survey forms, wineries are asked to record **total purchase value**. This is the total amount 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.

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. The **estimated total value of purchased grapes** is calculated by multiplying the average purchase value per tonne by the total tonnes purchased. The **estimated total value of total 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.

*Note: in small varieties there may sometimes be only one winery contributing towards a calculated average purchase value per tonne.*

### **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.

### *Highest and lowest price*

Wineries are asked to report the highest and lowest prices paid for any parcel of fruit of a particular variety, of any size. The highest of all highest prices, and the lowest of all lowest prices are reported – provided that at least three wineries have provided this information for any particular variety. *Note: the highest or lowest price may be for a very small parcel of fruit - and/or reflect an unusual pricing arrangement - eg payment by the hectare rather than per tonne, "spot market" sales of excess fruit etc.*

## FORECASTS

### *Estimated supply*

Supply forecasts have been calculated independently using the planting information obtained from the PGIBSA vineyard register (see below). They are calculated by multiplying the area of vines by an estimated yield figure determined separately for each variety in each region, which takes into account industry practices and objectives as well as historical averages. However, the supply forecasts do not make any allowance for future vine removals or mothballing, yield capping or the effects of ongoing water restrictions or unusual seasonal conditions.

### *Committed intake*

Committed intake is the amount of fruit that wineries are *already* committed to take in, for a given future year. It is made up of winery grown fruit and contract purchases. Only existing or ongoing contracts are included – not intended future signings or renewals.

# Explanations and Definitions

## *Available supply*

Available supply (uncommitted fruit) is the difference between estimated supply and committed intake. It is the amount of fruit estimated to be available on the open (spot) market. NB If the committed intake is higher than the estimated supply, this indicates a discrepancy between the independent supply forecasts and the wineries' estimates of future production. In this case, available supply is recorded as zero – rather than as a negative number.

## *Comparing supply and committed intake*

In order to compare supply with committed intake, the latter figures are “raised” to compensate for non-respondents. There is no raising of supply figures because it is assumed that the PGIBSA vineyard planting information is close to 100% complete. The non-response rate is calculated separately for each region and is indicated below the relevant tables.

## PLANTING DATA

### *Derivation of planting data tables*

Planting data is **not** derived from the 2011 South Australian Utilisation and Pricing Survey of wineries. 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 complete an accurate vineyard return each year, giving details of their plantings. This information is kept strictly confidential. An accurate vineyard register enables the Board to produce complete, up-to-date statistical information on vineyard plantings by variety, year planted and location.

For more information on registration of vineyards, please contact the Phylloxera and Grape Industry Board office on 08 8362 0488.

### *Explanatory notes for planting data tables*

1. Planting data tables are current as at April 2011 and include all plantings from the 2010 planting season. 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 2011 report compared with previous reports.
2. 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.
3. Where a 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)

## Vintage overview

*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 around 1,000 hectares.*

### *Overview of vintage statistics*

The harvest from South Australia (other) was 4,689 tonnes in 2011 up by 13% from the 2010 harvest of 4,164 tonnes. The total value of grapes from these areas decreased slightly to \$3 million compared with \$3.2 million last year.

There were no new plantings across the area covered by SA zone (other) in spring 2010 (including top-working and replacements).

The estimated production from the South Australia (other) vineyards for 2012 is 6,300 tonnes. The wineries' committed intake 4,900 tonnes, leaving an expectation of 1,400 tonnes surplus fruit.

The estimated supply remains the same across the forecast period, while the wineries' committed intake reduces to 2,900 tonnes, leaving an estimated 3,400 tonnes uncommitted at this stage for 2016.

## SA - other

## Winegrape intake summary - vintage 2011

*Incorporates Southern Flinders Ranges (564 tonnes), The Peninsulas (571 tonnes), Mount Lofty Ranges zone - other (2,081 tonnes) and Lower Murray zone - other (1,472 tonnes).*

Variety	Tonnes purchased	Lowest price <sup>1</sup>	Highest price <sup>1</sup>	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed <sup>2</sup>	Est total value ALL grapes
<b>RED</b>								
Cabernet Sauvignon	930	\$325	\$1,300	\$597,623	\$642	296	1,226	\$787,815
Grenache	0			\$0	\$0	12	12	\$8,489
Mataro	0			\$0	\$0	3	3	\$2,206
Merlot	331	\$300	\$700	\$172,689	\$522	80	411	\$214,552
Nebbiolo	26			\$16,617	\$638	0	26	\$16,617
Petit Verdot	61			\$63,125	\$1,032	0	61	\$63,125
Ruby Cabernet	7			\$1,830	\$250	0	7	\$1,830
Sangiovese	85			\$82,724	\$979	70	155	\$151,253
Shiraz	1,549	\$300	\$1,250	\$1,161,362	\$750	252	1,801	\$1,350,092
Tempranillo	8			\$10,712	\$1,300	0	8	\$10,712
<b>Total Red winegrapes</b>	<b>2,998</b>			<b>\$2,106,682</b>		<b>713</b>	<b>3,711</b>	<b>\$2,606,691</b>
<b>WHITE</b>								
Chardonnay	573	\$220	\$600	\$236,224	\$412	35	609	\$250,809
Colombard	98			\$25,608	\$262	0	98	\$25,608
Muscat a Petit Grains Blanc	0			\$0	\$0	10	10	\$4,325
Muscat Gordo Blanco	21			\$8,392	\$400	0	21	\$8,392
Pinot Gris	76			\$38,811	\$510	0	76	\$38,811
Riesling	10			\$12,000	\$1,200	0	10	\$12,000
Sauvignon Blanc	52			\$26,510	\$510	9	61	\$31,029
Semillon	0			\$0	\$0	77	77	\$32,027
Viognier	0			\$0	\$0	16	16	\$6,762
<b>Total White winegrapes</b>	<b>830</b>			<b>\$347,545</b>		<b>147</b>	<b>977</b>	<b>\$409,763</b>
<b>Total All winegrapes</b>	<b>3,828</b>			<b>\$2,454,227</b>		<b>861</b>	<b>4,689</b>	<b>\$3,016,454</b>

<sup>1</sup> 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.

<sup>2</sup> It is estimated that the non-response rate for South Australia (other) is 10.5%.

SA - other

Current plantings by variety and year planted

Lower Murray zone - other	Variety	Current area in hectares				Total area	% planted in 2010
		Pre-2008	2008	2009	2010		
	<b>Red winegrapes</b>						
	Cabernet Sauvignon	75	0	0	0	75	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	0	0	0	138	0%
	<b>Total red varieties</b>	<b>271</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>271</b>	<b>0%</b>
	<b>White winegrapes</b>						
	Chardonnay	93	0	0	0	93	0%
	Colombard	17	0	0	0	17	0%
	Other white	30	0	0	0	30	0%
	Riesling	13	0	0	0	13	0%
	Sauvignon Blanc	10	0	1	0	11	0%
	<b>Total white varieties</b>	<b>163</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>164</b>	<b>0%</b>
	Unknown variety	11	0	0	0	11	0%
	Tablegrapes	1	0	0	0	1	0%
	<b>Total all varieties</b>	<b>446</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>447</b>	<b>0%</b>

Southern Flinders Ranges	Variety	Current area in hectares				Total area	% planted in 2010
		Pre-2008	2008	2009	2010		
	<b>Red winegrapes</b>						
	Cabernet Sauvignon	24	0	0	0	24	0%
	Merlot	6	0	0	0	6	0%
	Other red	6	0	0	0	6	0%
	Shiraz	127	0	0	0	127	0%
	<b>Total red varieties</b>	<b>163</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>163</b>	<b>0%</b>
	<b>Total white varieties</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0%</b>
	<b>Total all varieties</b>	<b>165</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>165</b>	<b>0%</b>

Current area in hectares

SA - other

Current plantings by variety and year planted

	Variety	Pre-2008	2008	2009	2010	Total area	% planted in 2010
Mount Lofty Ranges - other	<b>Red winegrapes</b>						
	Cabernet Sauvignon	67	0	0	0	67	0%
	Merlot	18	0	0	0	18	0%
	Other red	14	0	0	0	14	0%
	Petit Verdot	6	0	0	0	6	0%
	Sangiovese	9	1	0	0	10	0%
	Shiraz	174	0	0	0	174	0%
	<b>Total red varieties</b>	<b>288</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>289</b>	<b>0%</b>
	<b>White winegrapes</b>						
	Chardonnay	21	0	0	0	21	0%
	Other white	5	0	0	0	5	0%
	Riesling	6	0	0	0	6	0%
	Semillon	8	0	0	0	8	0%
	<b>Total white varieties</b>	<b>41</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>41</b>	<b>0%</b>
Germplasm	1	0	3	0	4	0%	
Unknown variety	1	0	0	0	1	0%	
<b>Total all varieties</b>	<b>330</b>	<b>1</b>	<b>4</b>	<b>0</b>	<b>335</b>	<b>0%</b>	

Current area in hectares

	Variety	Pre-2008	2008	2009	2010	Total area	% planted in 2010
The Peninsulas	<b>Red winegrapes</b>						
	Cabernet Sauvignon	13	0	0	0	13	0%
	Other red	3	0	0	0	3	0%
	Shiraz	12	0	0	0	12	0%
	<b>Total red varieties</b>	<b>28</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>28</b>	<b>0%</b>
	<b>Total white varieties</b>	<b>9</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>9</b>	<b>0%</b>
	Unknown variety	33	0	0	0	33	0%
	<b>Total all varieties</b>	<b>70</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>70</b>	<b>0%</b>
	<b>Total for South Australia (other)</b>	<b>1012</b>	<b>1</b>	<b>4</b>	<b>0</b>	<b>1017</b>	<b>0%</b>

## SA zone - other

## Estimated supply and committed intake 2012 - 2016

Variety	2012				2014				2016			
	Est Supply <sup>1</sup>	Committed intake <sup>2</sup>			Est Supply <sup>1</sup>	Committed intake <sup>2</sup>			Est Supply <sup>1</sup>	Committed intake <sup>2</sup>		
		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake
<b>Red winegrapes</b>												
Cabernet Sauvignon	1,080	376	982	1,358	1,080	376	486	862	1,080	376	360	736
Grenache	0	11	0	11	0	19	0	19	0	19	0	19
Mataro	0	6	0	6	0	8	0	8	0	8	0	8
Merlot	260	94	317	411	260	94	164	258	260	94	80	174
Nebbiolo	0	0	40	40	0	0	0	0	0	0	0	0
Other Red	317	0	0	0	317	3	0	3	317	3	0	3
Petit Verdot	131	0	22	22	131	0	0	0	131	0	0	0
Ruby Cabernet	0	0	22	22	0	0	22	22	0	0	22	22
Sangiovese	57	78	88	166	57	78	0	78	57	78	0	78
Shiraz	2,742	288	1,652	1,940	2,742	294	878	1,172	2,742	294	878	1,172
Tempranillo	0	0	9	9	0	0	0	0	0	0	0	0
<b>Total red winegrapes</b>	<b>4,588</b>	<b>853</b>	<b>3,133</b>	<b>3,987</b>	<b>4,588</b>	<b>872</b>	<b>1,550</b>	<b>2,423</b>	<b>4,588</b>	<b>872</b>	<b>1,340</b>	<b>2,213</b>
<b>White winegrapes</b>												
Chardonnay	924	50	617	666	924	48	458	506	924	48	458	506
Colombard	119	0	45	45	119	0	45	45	119	0	45	45
Muscat a Petit Grains Blanc	0	6	0	6	0	6	0	6	0	6	0	6
Riesling	177	13	0	13	177	13	0	13	177	11	0	11
Sauvignon Blanc	92	15	0	15	92	17	0	17	92	17	0	17
Semillon	79	85	102	187	79	85	0	85	79	85	0	85
Viognier	20	20	0	20	20	20	0	20	20	20	0	20
<b>Total white winegrapes</b>	<b>1,690</b>	<b>188</b>	<b>763</b>	<b>951</b>	<b>1,690</b>	<b>189</b>	<b>503</b>	<b>691</b>	<b>1,690</b>	<b>187</b>	<b>503</b>	<b>690</b>
<b>All winegrapes</b>	<b>6,278</b>	<b>1,042</b>	<b>3,896</b>	<b>4,938</b>	<b>6,278</b>	<b>1,061</b>	<b>2,053</b>	<b>3,114</b>	<b>6,278</b>	<b>1,060</b>	<b>1,843</b>	<b>2,903</b>

<sup>1</sup> Supply forecast produced by PGIBSA based on the South Australian vineyard register

<sup>2</sup> A raising factor of 1.12 has been applied to committed intake to allow for non-respondents