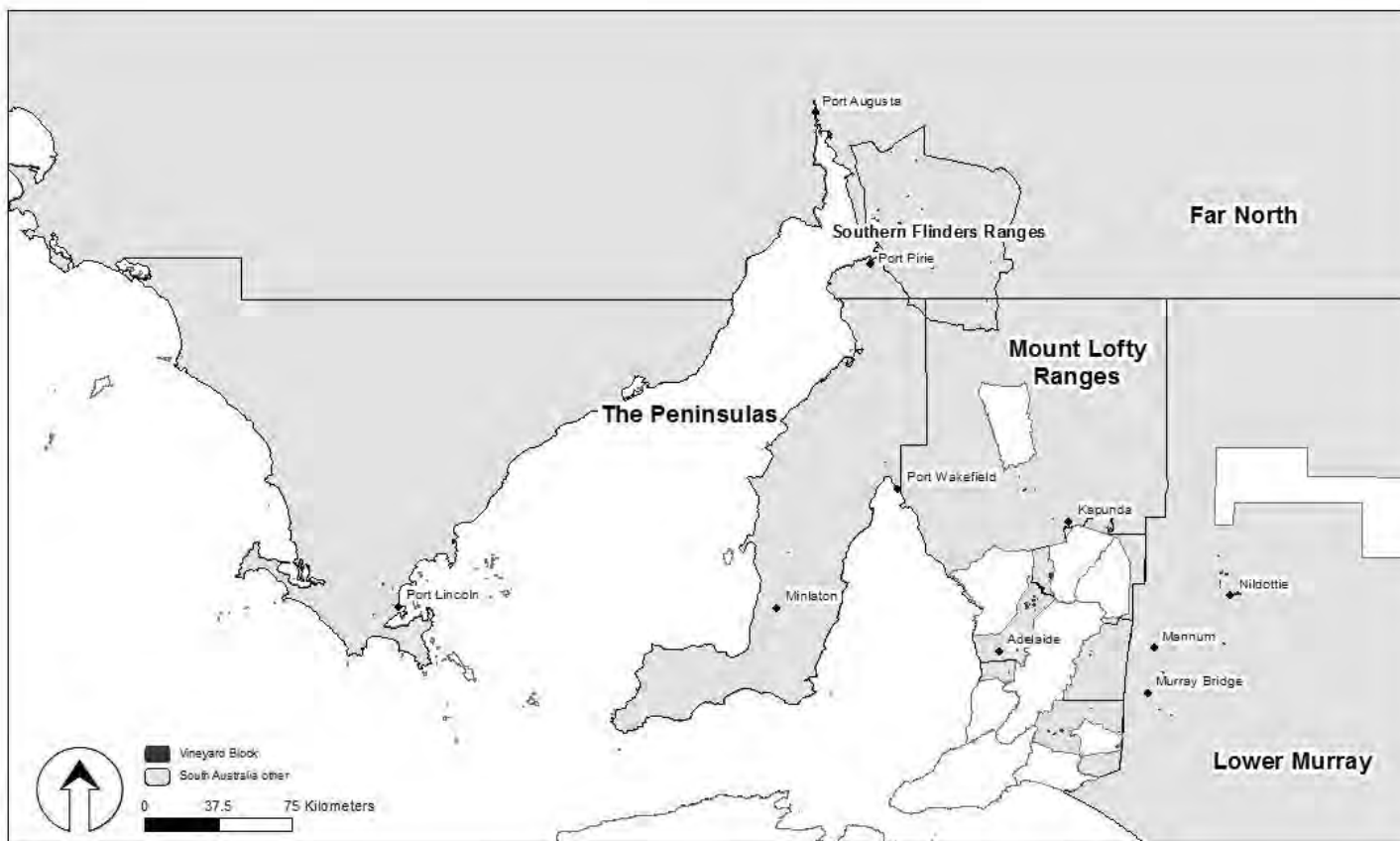


South Australia – other

Regional summary report 2012



DATUM: GDA94
PROJECTION: Transverse Mercator
DATE: 07 April 2011
SOFTWARE: ESRI ArcGIS v10
DATA SOURCE:
Vineyard Blocks - PGIBSA
Wine Regions - Wine Australia
Localities - SA Gazetteer

South Australia 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 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 2012 South Australian Crush 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)

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.

Vintage overview

Overview of vintage statistics

The harvest from South Australia (other) was 4,407 tonnes in 2012 up by 6.4% from the 2011 harvest of 4,289 tonnes. The total value of grapes from these areas decreased slightly to \$2.86 million compared with \$3.0 million last year.

There were minimal new plantings across the area covered by SA zone (other) in spring 2011 (including top-working and replacements) with a slight increase in the total from 1,017 hectares to 1,028 hectares.

The estimated production from the South Australia (other) for 2013 is 6,600 tonnes. The wineries' committed intake 3,550 tonnes, leaving an expectation of 3,050 tonnes (46.2%) surplus fruit.

The estimated supply remains the same across the forecast period, while the wineries' committed intake reduces to 2,450 tonnes, leaving an estimated 4,150 tonnes (62.9%) uncommitted at this stage for 2017.

SA - other

Winegrape intake summary - vintage 2012

*Incorporates Southern Flinders Rangers (716 tonnes), Mount Lofty Ranges zone - other (1,285 tonnes),
The Peninsulas (217 tonnes) and Lower Murray zone - other (2,188 tonnes).*

Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
RED								
Cabernet Sauvignon	968	\$370	\$1,500	\$640,141	\$661	20	988	\$653,437
Grenache	0			\$0	\$0	6	6	\$4,233
Merlot	444	\$370	\$1,000	\$251,741	\$567	3	447	\$253,578
Nebbiolo	20			\$13,000	\$650	0	20	\$13,000
Other Red	8			\$10,900	\$1,345	0	8	\$10,900
Petit Verdot	21			\$13,650	\$650	30	51	\$33,150
Ruby Cabernet	26			\$7,776	\$300	0	26	\$7,776
Sangiovese	49			\$53,482	\$1,100	27	76	\$83,170
Shiraz	1,861	\$340	\$1,500	\$1,402,956	\$754	60	1,920	\$1,447,891
Tempranillo	4			\$5,040	\$1,400	0	4	\$5,040
Total Red winegrapes	3,400			\$2,398,686		146	3,546	\$2,512,175
WHITE								
Chardonnay	581	\$260	\$600	\$226,196	\$390	4	585	\$227,770
Colombard	113			\$45,048	\$400	0	113	\$45,048
Muscat Gordo Blanco	22			\$9,981	\$450	0	22	\$9,981
Pinot Gris	52			\$26,418	\$510	0	52	\$26,418
Riesling	0			\$0	\$0	5	5	\$1,994
Sauvignon Blanc	73			\$36,975	\$510	9	81	\$41,392
Semillon	0			\$0	\$0	0	0	\$164
Viognier	0			\$0	\$0	4	4	\$1,436
Total White winegrapes	840			\$344,618		21	861	\$354,203
Total All winegrapes	4,240			\$2,743,305		167	4,407	\$2,866,378

¹ 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.

² It is estimated that the non-response rate for South Australia (other) is 26.8%.

SA - other

Current plantings by variety and year planted

Variety	Current area in hectares					Total area	% planted in 2011
	Pre-2009	2009	2010	2011			
Lower Murray zone - other							
Red winegrapes							
Cabernet Sauvignon	75	0	0	0	75	0%	
Merlot	16	0	0	0	16	0%	
Other red	26	0	0	0	26	0%	
Petit Verdot	16	0	0	0	16	0%	
Shiraz	138	0	0	0	138	0%	
Total red varieties	272	0	0	0	272	0%	
White winegrapes							
Chardonnay	93	0	0	0	93	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	10	1	0	0	11	0%	
Total white varieties	161	1	0	0	162	0%	
Unknown variety	11	0	0	0	11	0%	
Tablegrapes	0	0	0	0	0	0%	
Total all varieties	444	1	0	0	445	0%	

Variety	Current area in hectares					Total area	% planted in 2011
	Pre-2009	2009	2010	2011			
Southern Flinders Ranges							
Red winegrapes							
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%	
Total red varieties	163	0	0	0	163	0%	
Total white varieties	2	0	0	0	2	0%	
Total all varieties	165	0	0	0	165	0%	

Current area in hectares

SA - other

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2011
	Pre-2009	2009	2010	2011		
Mount Lofty Ranges - other						
Red winegrapes						
Cabernet Sauvignon	67	0	0	0	67	0%
Merlot	16	0	0	0	16	0%
Other red	17	2	0	2	21	10%
Petit Verdot	6	0	0	0	6	0%
Sangiovese	11	1	0	0	12	0%
Shiraz	173	6	0	0	179	0%
Total red varieties	289	9	0	2	300	1%
White winegrapes						
Chardonnay	19	0	0	0	19	0%
Other white	5	0	0	4	9	39%
Riesling	6	0	0	0	6	0%
Semillon	5	0	0	0	8	0%
Total white varieties	36	0	0	4	42	8%
Germplasm	1	3	0	0	4	0%
Unknown variety	2	0	0	0	2	0%
Table grapes - white	0	0	0	1	1	100%
Total all varieties	328	13	0	6	349	2%

Variety	Current area in hectares				Total area	% planted in 2011
	Pre-2009	2009	2010	2011		
The Peninsulas						
Red winegrapes						
Cabernet Sauvignon	13	0	0	0	13	0%
Other red	3	0	0	0	3	0%
Shiraz	12	0	0	0	12	0%
Total red varieties	28	0	0	0	28	0%
White winegrapes						
Total white varieties	7	0	0	0	7	4%
Unknown variety	35	0	0	0	35	0%
Total all varieties	70	0	0	0	70	0%
Total for South Australia (other)	1008	13	0	6	1028	1%

SA Other

Estimated supply and committed intake 2013 - 2017

Variety	2013				2015				2017			
	Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²		
		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake
Red winegrapes												
Cabernet Sauvignon	1,076	36	871	906	1,076	36	738	773	1,076	36	699	735
Grenache	0	0	0	0	0	0	0	0	0	0	0	0
Mataro	0	0	3	3	0	0	10	10	0	0	0	0
Merlot	235	8	252	261	235	8	261	269	235	8	261	269
Nebbiolo	0	0	16	16	0	0	0	0	0	0	0	0
Other Red	476	0	0	0	488	0	0	0	488	0	0	0
Petit Verdot	131	0	0	0	131	0	0	0	131	0	0	0
Ruby Cabernet	0	0	0	0	0	0	0	0	0	0	0	0
Sangiovese	69	0	35	35	70	0	0	0	70	0	0	0
Shiraz	2,728	97	1,622	1,720	2,739	97	1,339	1,437	2,739	97	756	853
Tempranillo	0	0	8	8	0	0	0	0	0	0	0	0
Total red winegrapes	4,714	141	2,808	2,949	4,739	141	2,348	2,489	4,739	141	1,715	1,856
White winegrapes												
Chardonnay	919	15	429	444	919	15	429	444	919	15	429	444
Colombard	131	0	0	0	131	0	0	0	131	0	0	0
Muscat Gordo Blanco	0	0	0	0	0	0	0	0	0	0	0	0
Pinot Gris	0	0	51	51	0	0	51	51	0	0	51	51
Riesling	178	15	0	15	178	15	0	15	178	15	0	15
Sauvignon Blanc	103	11	72	83	106	13	72	85	106	13	72	85
Semillon	59	1	0	1	59	1	0	1	59	1	0	1
Viognier	20	10	0	10	20	10	0	10	20	10	0	10
Total white winegrapes	1,891	52	552	604	1,915	54	552	606	1,915	54	552	606
All winegrapes	6,605	193	3,359	3,553	6,655	195	2,900	3,095	6,655	195	2,267	2,462

¹ Supply forecast produced by PGIBSA based on the South Australian vineyard register

² A raising factor of 1.02 has been applied to committed intake to allow for non-respondents