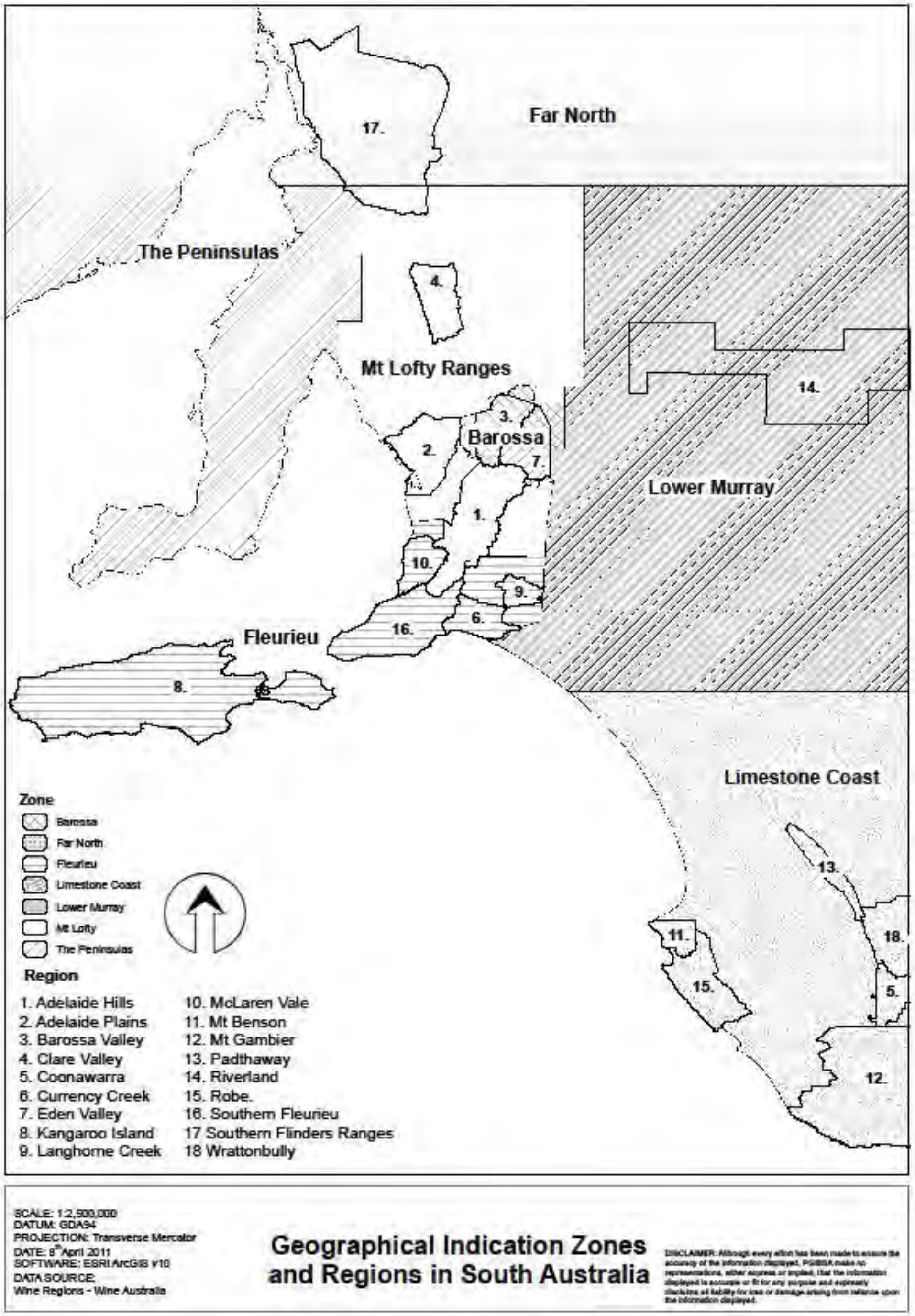
The South Australian Winegrape Utilisation and Pricing Survey

State summary report 2011



ACKNOWLEDGEMENTS

This survey has been produced by the Phylloxera and Grape Industry Board of South Australia on behalf of the **South Australian Wine Industry Association,** the **Wine Grape Council of SA Inc** and **Primary Industries and Resources SA,** who jointly fund the survey.

The publication of this survey is made possible through the support of the South Australian and interstate wineries that processed fruit from South Australian vineyards in 2011. The information is provided voluntarily by wineries on the understanding and assurance that information from individual wineries will be kept strictly confidential. Only aggregate responses are reported. Draft results and supply forecasts are checked by regional industry representatives. Vintage reports have been provided by the regional representatives, local growers or industry associations. Particular thanks for their assistance go to: Ashley Chabrel, Thomas Davies, David Edwards, Elise Heyes, Sue Hodder, Lian Jaensch, Murray Leake, Sam McCardle, Jodie Pain, Louisa Rose, Stuart Sharman, Nigel Squire, David Watkins, and Daniel Zuzolo.

The survey publication is available on the Board's website www.phylloxera.com.au. The state summary and regional reports can be downloaded as PDF files. Previous reports (since 2000) are also available on the website, and hard copies of reports from previous years back to 1998 are available from the Board's office.

COVER IMAGE

Photograph by the Phylloxera and Grape Industry Board of SA.

REPORT PREPARATION

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DOCUMENT STRUCTURE AND LAYOUT

The full survey report incorporates 15 stand-alone regional reports, covering the major declared GI regions in South Australia, and a state summary section with aggregate data, forecasts by variety and historical comparisons. The report may be downloaded as one document or in sections as a series of PDF files from the PGIBSA website www.phylloxera.com.au.

INTERPRETATION OF REPORT INFORMATION

Please refer to the **EXPLANATIONS AND DEFINITIONS** for definitions, limitations and interpretations of different statistics reported.

Any questions about the report should be directed to:

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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 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.

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.

State summary

Overview of vintage statistics 2011

State and regional overview

The total crush of South Australian winegrapes in 2011 was 682,671 tonnes. This was an increase of 1,093 tonnes above the 2010 harvest; with the top three regions being – the Riverland 56% (382,223 tonnes crushed), Barossa Valley 9.1% (62,118 tonnes crushed) and McLaren Vale 6.7% (45,518 tonnes crushed).

The Riverland increased its production by 15% on the 2010 figures, McLaren Vale up by 7% and Barossa Valley up 4.2%, whilst the regions in the south east were down – Wrattonbully down by 39%, Padthaway down by 29% and Coonawarra down by 28%. The Adelaide Hills was also down on production by 22%.

The total estimated purchase value of the crush was $360 million, down by $66 million (15.4%) from 2010. The average purchase value per tonne across the state fell from $936 per tonne in 2008, to $667 per tonne in 2009, to $626 per tonne in 2010, and now to $566 in 2011. The average purchase values for the major varieties decreased in all but one region.

The regions were faced with a challenging 2011 harvest with pest and disease pressures high, which was due to the cooler growing conditions and the above average summer rainfall.

Varietal overview

The red crush was 387,511 tonnes; the white crush was 293,890 tonnes. Among the white varieties, Chardonnay accounted for 52% of the production, up from 2010 by 7%. It is still five times its nearest rival (Sauvignon Blanc 9.9%), while of the reds, Shiraz accounted for 43%, with Cabernet Sauvignon second at 33%. Across all varieties, the proportion of purchased versus winery grown fruit was similar to 2010 at 73%.

Vineyard plantings

Planting data derived from the Phylloxera and Grape Industry Board's vineyard register shows that there were 76,495 hectares planted to vines in South Australia as at 30 April 2011. This represents a net decrease in the total area of 557 hectares since April 2010, compared to a 1,600 hectare decrease in 2010. There was a total of 378 hectares (<1% of the total area) planted in spring 2010 (including top-working and replants as well as new area). There were more than 75% new plantings of red than white varieties, compared with an equal split in 2008. The top 4 most planted varieties were all red varieties; Shiraz (142 ha), Cabernet Sauvignon (48 ha), Tempranillo (25 ha) and Pinot Noir (22 ha). Pinot Gris was the most planted white variety with 19 ha followed by Muscat Gordo Blanco (14 ha). Sauvignon Blanc plantings have declined from 156 ha in 2008 to 4 hectares in 2010.

There were a total of 3,649 growers registered with the Board as at 30 April 2011. 2133 growers (58.5%) have properties smaller than 10 hectares and account for 12% of the total vineyard area, while 127 growers (3.5%) have properties larger than 100 hectares (in the same region) and account for 39% of the vineyard area.

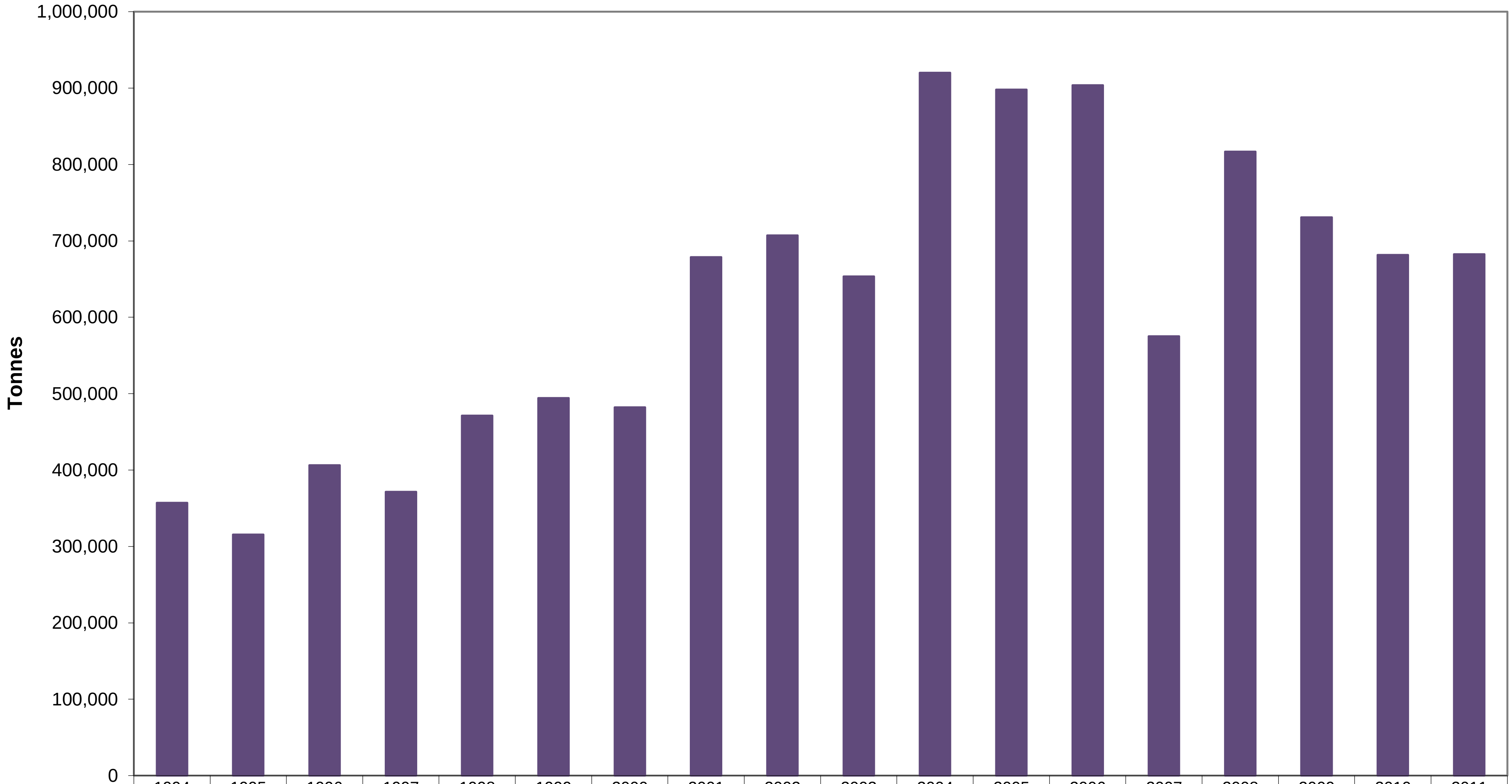
Projections for future supply and requirements

Supply projections are included in the survey report, together with the wineries' estimates of future demand and committed intake, which are collected in this survey. The estimated production for 2012 for South Australia is estimated at 841,000 tonnes – slightly higher than the 2010 harvest. Approximately 762,000 tonnes is either winery grown fruit or already contracted; indicating there will be a surplus of 79,000 tonnes of fruit next year.

The estimated supply of grapes for South Australia in 2016 is around 843,000 tonnes. This estimate is based on the assumption of a return to "normal" growing conditions. It does not take into account any residual effects of disease pressures and water allocations and quality or industry restructuring initiatives driven by consumer demand. This would result in an oversupply of nearly 267,000 tonnes, as winery demand for 2016 as reported in the survey is only 577,000 tonnes. It is important to note that due to uncertainty in the market place an increasing number of reporting wineries were unable to estimated demand beyond 2012.

State summary

Historical grape crush 1994 - 2011



	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Actual tonnage	357,217	315,482	406,387	371,533	471,313	494,205	482,157	678,821	707,151	653,535	920,194	898,165	904,022	575,111	816,868	730,904	681,578	682,671

State summary

Vintage by region 2001 - 2011

Not including the Riverland

State summary

Total crush by GI region 2011 vs 2010

GI region	*Winery grown (tonnes)*	*Purchased (tonnes)*	*Total crushed 2011*	*% of state crush*	*Total crush 2010*	*% difference 2011 vs 2010*
Adelaide Hills	6,629	15,242	21,871	*3%*	28,161	*-22%*
Adelaide Plains	420	4,784	5,204	*1%*	4,777	*9%*
Barossa Valley	15,091	47,027	62,118	*9%*	60,064	*3%*
Barossa Zone other	503	746	1,249	*0%*	732	*71%*
Clare Valley	9,304	9,497	18,801	*3%*	21,675	*-13%*
Coonawarra	16,466	9,643	26,109	*4%*	36,094	*-28%*
Currency Creek	-	6,488	6,488	*1%*	8,947	*-27%*
Eden Valley	5,786	6,476	12,262	*2%*	10,876	*13%*
Fleurieu zone - other	257	748	1,005	*0%*	1,818	*-45%*
Kangaroo Island	85	68	153	*0%*	135	*13%*
Langhorne Creek	14,089	25,457	39,546	*6%*	46,334	*-15%*
Limestone Coast zone - other	3,970	4,668	8,638	*1%*	13,845	*-38%*
Lower Murray zone - other	203	1,269	1,472	*0%*	1,395	*5%*
McLaren Vale	20,311	25,207	45,518	*7%*	42,679	*7%*
Mount Benson	812	1,932	2,744	*0%*	2,483	*10%*
Mount Lofty Ranges zone - other	318	1,763	2,081	*0%*	1,679	*24%*
Padthaway	12,150	14,437	26,586	*4%*	37,256	*-29%*
Riverland	66,864	315,359	382,223	*56%*	333,600	*15%*
Robe	1,422	807	2,228	*0%*	3,829	*-42%*
Southern Fleurieu	258	876	1,134	*0%*	815	*39%*
Southern Flinders Ranges	30	534	564	*0%*	1,037	*-46%*
The Peninsulas	309	262	571	*0%*	52	*999%*
Wrattonbully	7,158	6,946	14,105	*2%*	23,292	*-39%*
Total all regions	**182,436**	**500,235**	**682,671**	***100%***	**681,578**	***0%***

Vintage Summary by region 2011

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Adelaide Hills	Red	1,442	5,717	7,159	$6,288,419	$7,886,369
	White	5,187	9,525	14,712	$10,562,466	$16,366,849
	All	6,629	15,242	21,871	$16,850,885	$24,253,218
Adelaide Plains	Red	209	2,824	3,033	$1,879,087	$2,029,979
	White	211	1,960	2,171	$1,295,378	$1,439,214
	All	420	4,784	5,204	$3,174,465	$3,469,194
Barossa Valley	Red	10,944	36,844	47,788	$40,904,980	$53,042,926
	White	4,650	10,928	15,579	$6,138,187	$8,862,182
	All	15,594	47,773	63,367	$47,043,167	$61,905,108
Clare Valley	Red	5,843	4,195	10,038	$3,832,440	$9,223,362
	White	3,461	5,301	8,763	$4,415,239	$7,349,807
	All	9,304	9,497	18,801	$8,247,679	$16,573,169
Coonawarra	Red	13,457	8,335	21,792	$6,878,300	$17,289,375
	White	3,009	1,308	4,317	$843,441	$2,673,432
	All	16,466	9,643	26,109	$7,721,741	$19,962,808
Currency Creek	Red	0	5,262	5,262	$4,260,267	$4,260,267
	White	0	1,226	1,226	$955,345	$955,345
	All	0	6,488	6,488	$5,215,612	$5,215,612
Eden Valley	Red	2,442	2,774	5,216	$2,867,882	$5,195,467
	White	3,344	3,702	7,046	$3,515,709	$6,725,334
	All	5,786	6,476	12,262	$6,383,591	$11,920,801
Fleurieu zone - other	Red	301	1,084	1,385	$1,081,450	$1,378,579
	White	299	609	908	$307,150	$461,876
	All	600	1,693	2,293	$1,388,600	$1,840,455

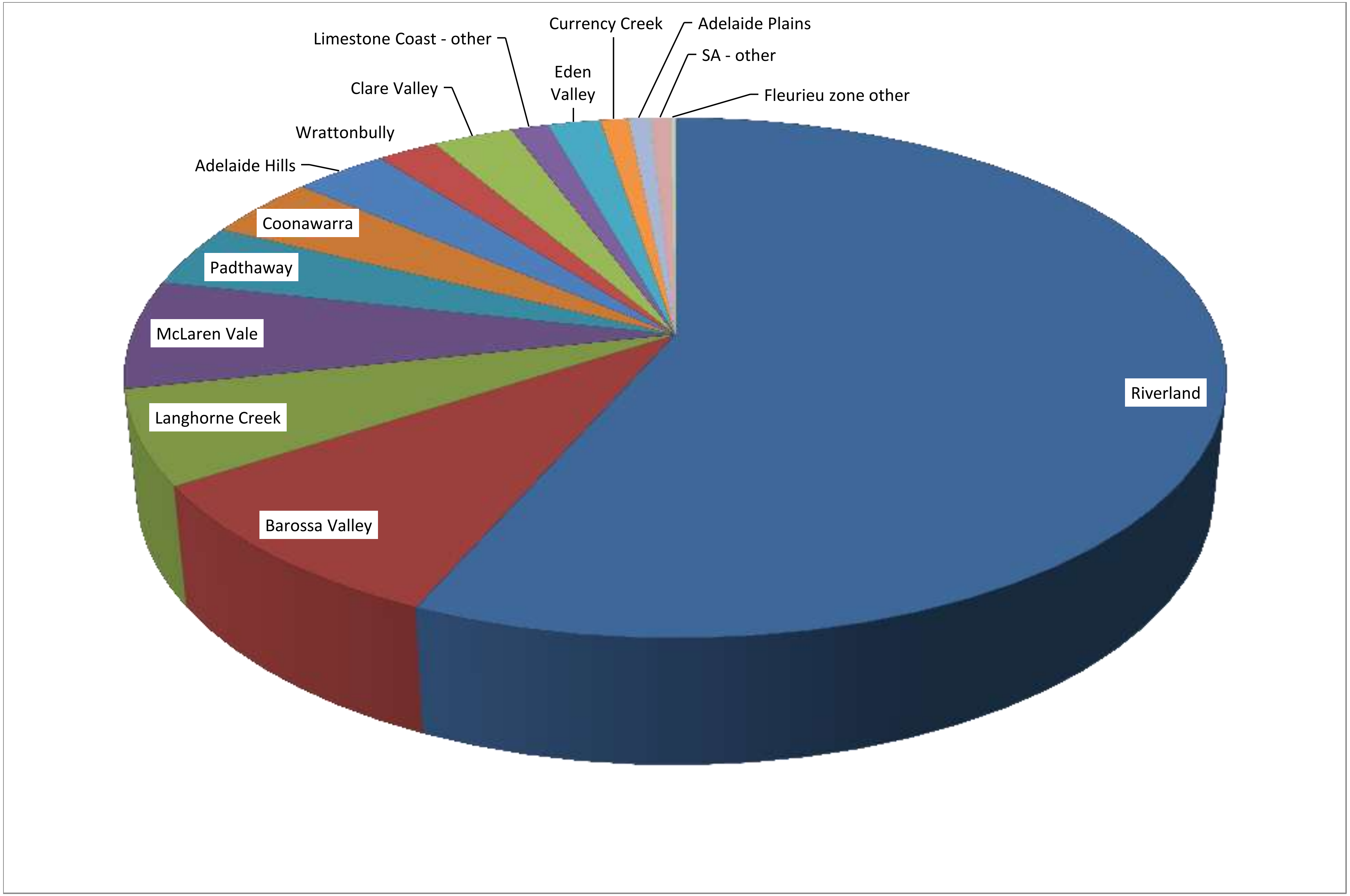
Vintage Summary by region 2011

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Langhorne Creek	Red	9,940	20,045	29,985	$11,325,626	$16,835,105
	White	4,149	5,412	9,561	$3,310,894	$5,830,196
	All	14,089	25,457	39,546	$14,636,520	$22,665,301
Limestone Coast zone - other	Red	4,042	5,431	9,473	$4,347,867	$7,684,332
	White	2,162	1,976	4,138	$1,318,480	$2,686,135
	All	6,203	7,407	13,610	$5,666,347	$10,370,468
McLaren Vale	Red	17,198	20,294	37,492	$22,871,081	$42,027,933
	White	3,113	4,913	8,026	$3,299,959	$5,507,968
	All	20,311	25,207	45,518	$26,171,040	$47,535,902
Padthaway	Red	5,298	6,659	11,956	$4,338,706	$7,591,779
	White	6,852	7,778	14,630	$5,387,584	$9,565,355
	All	12,150	14,437	26,586	$9,726,290	$17,157,133
Riverland	Red	38,764	144,755	183,519	$43,768,465	$55,297,996
	White	28,100	170,603	198,704	$42,695,536	$49,927,995
	All	66,864	315,359	382,223	$86,464,001	$105,225,991
SA - other	Red	713	2,998	3,711	$2,106,682	$2,606,691
	White	147	830	977	$347,545	$409,763
	All	861	3,828	4,689	$2,454,227	$3,016,454
Wrattonbully	Red	5,418	5,555	10,973	$3,663,206	$7,326,142
	White	1,741	1,391	3,132	$830,387	$2,187,193
	All	7,158	6,946	14,105	$4,493,593	$9,513,335
All winegrapes		**182,436**	**500,235**	**682,671**	**$245,637,758**	**$360,624,948**

Note: The "estimated value of total crush" is the value estimate from the tonnage and price for all varieties in each region.

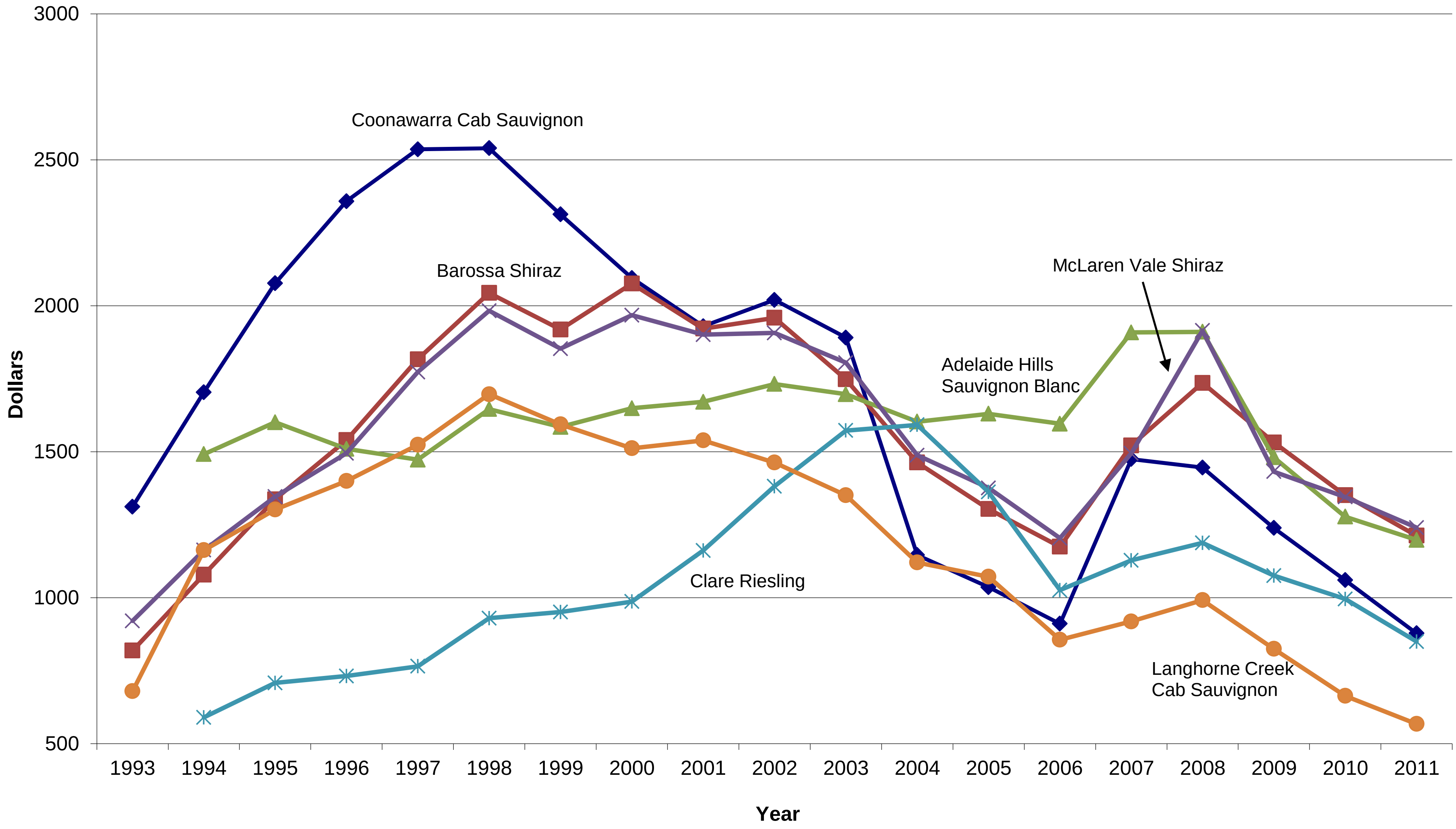
State summary

Crush by region pie chart



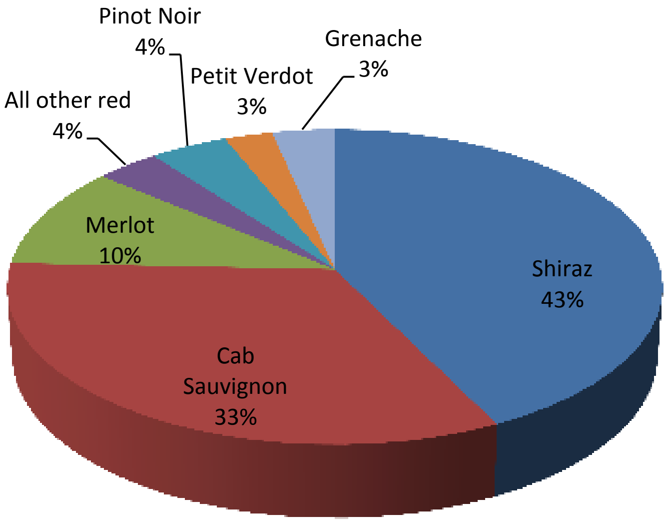
Historical weighted average prices

Major variety-region combinations



Red winegrapes

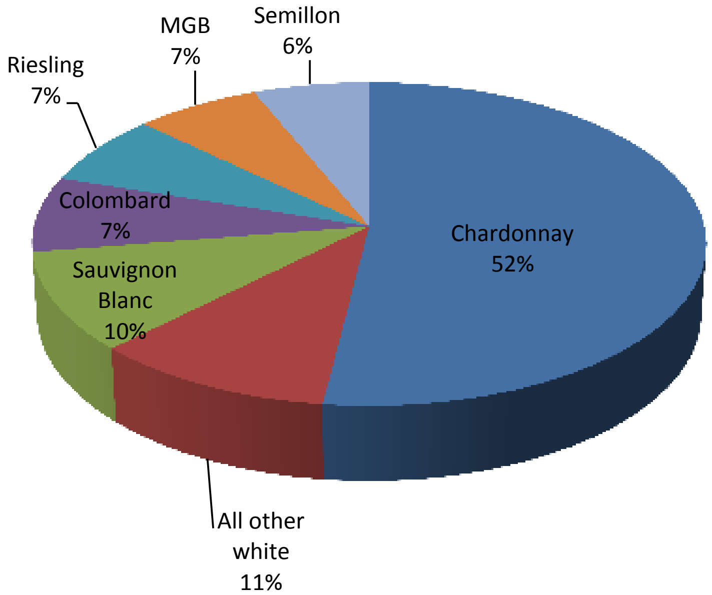
Variety	*Tonnes purchased*	*Winery grown fruit*	*Total crushed*	*% purchased*	*Est total value of crush*
Red winegrapes					
Barbera	65	34	99	65%	$30,921
Cabernet Franc	244	451	695	35%	$623,125
Cabernet Sauvignon	86,413	42,083	128,496	67%	$72,205,595
Carignan	30	59	89	33%	$115,084
Grenache	9,605	3,790	13,396	72%	$7,998,085
Malbec	823	413	1,236	67%	$835,346
Mataro	3,358	639	3,997	84%	$2,148,783
Merlot	27,137	13,355	40,492	67%	$19,539,918
Meunier	247	78	326	76%	$335,079
Nebbiolo	38	118	156	24%	$213,037
Other Red	1,076	357	1,434	75%	$979,785
Petit Verdot	6,716	3,505	10,221	66%	$2,929,811
Pinot Noir	13,168	3,536	16,704	79%	$11,027,953
Ruby Cabernet	855	1,218	2,073	41%	$503,812
Sangiovese	1,015	867	1,882	54%	$1,372,384
Shiraz	120,677	45,026	165,703	73%	$105,402,468
Tarrango	152	0	152	100%	$30,336
Tempranillo	1,012	339	1,350	75%	$1,335,325
Touriga	83	78	161	51%	$106,722
Zinfandel	56	64	120	47%	$106,451
Total Red winegrapes	**272,769**	**116,010**	**388,781**	**70%**	**$227,840,019**



Vintage summary by variety 2011

White winegrapes

Variety	*Tonnes purchased*	*Winery grown fruit*	*Total crushed*	*% purchased*	*Est total value of crush*
White winegrapes					
Canada Muscat	148	0	148	100%	$71,496
Chardonnay	126,559	26,178	152,737	83%	$46,429,818
Chenin Blanc	2,209	238	2,447	90%	$592,620
Colombard	18,991	3,188	22,179	86%	$4,578,541
Crouchen	45	113	158	28%	$37,457
Doradillo	128	330	458	28%	$67,558
Marsanne	99	104	202	49%	$204,996
Muscadelle	36	113	150	24%	$80,931
Muscat a Petit Grains Blanc	3,262	580	3,841	85%	$1,464,622
Muscat Gordo Blanco	17,443	2,273	19,716	88%	$6,664,344
Other White	1,291	797	2,088	62%	$1,347,989
Palomino	4	15	19	21%	$14,977
Pedro Ximenes	5	37	42	11%	$7,931
Pinot Gris	6,184	3,830	10,014	62%	$8,978,290
Riesling	10,895	9,944	20,839	52%	$15,687,411
Roussanne	83	93	176	47%	$192,494
Sauvignon Blanc	20,073	9,165	29,238	69%	$18,919,106
Semillon	11,172	7,000	18,172	61%	$7,615,877
Sultana	172	0	172	100%	$32,612
Taminga	96	0	96	100%	$19,124
Traminer	3,570	893	4,463	80%	$2,099,907
Trebbiano	74	0	74	100%	$19,249
Verdelho	2,748	561	3,309	83%	$1,302,904
Viognier	2,180	971	3,152	69%	$1,815,941
Total White winegrapes	**227,466**	**66,425**	**293,890**	**77%**	**$118,246,193**
Total All winegrapes	**500,235**	**182,435**	**682,671**	**73%**	**$346,086,213**



There is an estimated non-response rate of 2.6% across the state.

Note: The "estimated total value of crush" is the value estimated from the tonnage and price by each variety from all regions.

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2008*	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*
White winegrapes						
Chardonnay	10,365	11	4	2	10,382	*0%*
Riesling	2,973	15	4	9	3,002	*0%*
Sauvignon Blanc	2,431	156	22	4	2,613	*0%*
Semillon	1,443	1	0	0	1,445	*0%*
Muscat Gordo Blanco	1,072	27	12	14	1,125	*1%*
Pinot Gris	811	74	22	19	927	*2%*
Colombard	873	1	0	2	875	*0%*
Viognier	561	7	3	0	571	*0%*
Verdelho	255	1	0	1	257	*0%*
Muscat A Petit Grains Blanc	190	17	18	4	229	*2%*
Traminer (Gewurztraminer)	205	0	4	4	213	*2%*
Sultana	202	0	0	0	202	*0%*
Chenin Blanc	158	3	2	0	163	*0%*
Doradillo	85	0	0	0	85	*0%*
Savagnin Blanc	27	25	1	1	54	*2%*
Palomino	36	0	0	0	36	*0%*
Vermentino	4	8	21	2	36	*6%*
Muscadelle (Tokay)	34	0	0	0	34	*0%*
Marsanne	27	3	0	0	30	*0%*
Pedro Ximenes	29	0	0	0	29	*0%*
Fiano	12	2	7	5	26	*19%*
Trebbiano	25	0	0	0	25	*0%*
Roussanne	19	3	2	0	24	*0%*
Albarino	6	11	4	0	20	*0%*
Other white	81	6	7	5	99	*5%*
Total white varieties	**21,924**	**372**	**133**	**73**	**22,503**	***0%***

State summary

Current plantings by variety and year planted

Variety	Current area in hectares					
	Pre-2008	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*
Red winegrapes						
Shiraz	24,865	415	181	142	25,602	*0%*
Cabernet Sauvignon	16,542	104	85	48	16,779	*0%*
Merlot	4,272	11	5	2	4,290	*0%*
Grenache	1,782	15	13	13	1,823	*1%*
Pinot Noir	1,463	88	98	22	1,671	*1%*
Petit Verdot	771	0	0	0	771	*0%*
Mataro (Mourvedre)	598	26	17	12	653	*2%*
Tempranillo	190	28	36	25	279	*9%*
Malbec	232	2	1	9	243	*4%*
Sangiovese	208	7	2	6	224	*3%*
Cabernet Franc	195	2	0	1	198	*1%*
Ruby Cabernet	192	0	1	0	193	*0%*
Nebbiolo	48	1	1	1	51	*2%*
Zinfandel	38	1	0	0	39	*0%*
Meunier (Pinot Meunier)	39	0	0	0	39	*0%*
Durif (Petite Sirah)	22	5	1	6	34	*18%*
Touriga	25	3	1	0	29	*0%*
Barbera	26	3	1	0	29	*0%*
Montepulciano	4	3	4	5	16	*31%*
Sagrantino	7	0	3	0	10	*0%*
Other red	166	15	9	12	202	*6%*
Total red varieties	**51,685**	**728**	**459**	**302**	**53,174**	***1%***
Unknown variety	577	0	0	0	578	*0%*
Germplasm	1	0	3	0	4	*0%*
Rootstock Block	39	1	0	0	40	*0%*
Multi-purpose red	80	0	2	3	85	*4%*
Multi-purpose white	33	0	0	0	34	*0%*
Tablegrapes - red	50	1	0	0	51	*0%*
Tablegrapes - white	26	0	0	0	26	*0%*
Total all varieties	**74,416**	**1,103**	**598**	**378**	**76,495**	***0%***

State summary

Current plantings by region and year planted

		Current area in hectares						
Zone	**Region**	*Pre-2008*	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*	*% of state plantings*
Barossa	Barossa Valley	10,376	273	152	144	10,944	*1%*	*14%*
	Eden Valley	2,189	21	11	11	2,231	*0%*	*3%*
	Barossa Zone - Other	229	0	0	0	229	*0%*	*0%*
	Total for Barossa	**12,794**	**293**	**162**	**155**	**13,405**	***1%***	***18%***
Fleurieu	Currency Creek	955	0	8	0	964	*0%*	*1%*
	Kangaroo Island	137	2	3	0	142	*0%*	*0%*
	Langhorne Creek	5,954	26	67	25	6,073	*0%*	*8%*
	Mclaren Vale	7,084	143	57	43	7,327	*1%*	*10%*
	Southern Fleurieu	544	6	0	0	551	*0%*	*1%*
	Fleurieu Zone - Other	198	0	0	0	198	*0%*	*0%*
	Total for Fleurieu	**14,874**	**178**	**135**	**68**	**15,255**	***0%***	***20%***
Limestone Coast	Bordertown	1,251	4	0	4	1,259	*0%*	*2%*
	Coonawarra	5,671	7	10	24	5,713	*0%*	*7%*
	Mount Benson	484	17	0	2	503	*0%*	*1%*
	Mount Gambier	232	10	1	0	243	*0%*	*0%*
	Padthaway	3,962	46	35	8	4,050	*0%*	*5%*
	Robe	747	0	0	0	747	*0%*	*1%*
	Wrattonbully	2,625	30	7	0	2,662	*0%*	*3%*
	Limestone Coast Zone - Other	595	0	7	0	602	*0%*	*1%*
	Total for Limestone Coast	**15,566**	**114**	**60**	**38**	**15,778**	***0%***	***21%***
Lower Murray	Riverland	20,378	266	140	75	20,860	*0%*	*27%*
	Lower Murray Zone - Other	446	0	1	0	447	*0%*	*1%*
	Total for Lower Murray	**20,825**	**266**	**141**	**75**	**21,307**	***0%***	***28%***
Mount Lofty Ranges	Adelaide Hills	3,744	141	81	26	3,992	*1%*	*5%*
	Adelaide Plains	650	13	0	0	663	*0%*	*1%*
	Clare Valley	5,398	97	16	16	5,527	*0%*	*7%*
	Mount Lofty Ranges Zone - Other	330	1	3	0	335	*0%*	*0%*
	Total for Mount Lofty Ranges	**10,122**	**252**	**100**	**42**	**10,516**	***0%***	***0%***
Far North	Southern Flinders Ranges	165	0	0	0	165	*0%*	*0%*
The Peninsulas		70	0	0	0	70	*0%*	*0%*
	Total for All GIs	74,416	1,103	598	378	76,495	***0%***	***100%***

Number of growers by region and property size 2011

Property size in hectares

	< 10 ha		*10 - 24 ha*		*25 - 49 ha*		*50 - 99 ha*		*100+ ha*		***Total***	
GI region	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*
Barossa												
Barossa Valley	1,390	336	2,447	155	2,275	70	1,540	24	3,292	14	10,944	599
Eden Valley	393	92	459	31	356	11	548	7	475	2	2,231	143
Barossa Zone - Other	8	3	14	1	0	0	84	1	124	1	229	6
Fleurieu												
Currency Creek	62	14	162	11	192	5	0	0	548	2	964	32
Kangaroo Island	119	21	23	2	0	0	0	0	0	0	142	23
Langhorne Creek	125	24	387	23	850	24	1,214	17	3,497	14	6,073	102
Mclaren Vale	1,508	356	1,616	103	1,406	43	1,466	20	1,331	6	7,327	528
Southern Fleurieu	119	37	101	8	263	7	68	1	0	0	551	53
Fleurieu Zone - Other	23	7	43	3	39	1	93	1	0	0	198	12
Limestone Coast												
Bordertown	0	0	0	0	43	1	0	0	1,216	5	1,259	6
Coonawarra	297	54	481	32	583	17	1,057	16	3,294	11	5,713	130
Mount Benson	37	6	65	4	157	5	114	2	129	1	503	18
Mount Gambier	59	15	26	2	64	2	94	1	0	0	243	20
Padthaway	10	1	36	3	318	9	627	9	3,059	10	4,050	32
Robe	18	2	75	4	81	2	54	1	519	3	747	12
Wrattonbully	63	11	382	22	308	9	524	7	1,386	6	2,662	55
Limestone Coast Zone - Other	68	15	30	2	59	2	202	3	242	2	602	24
Lower Murray												
Riverland	3,238	636	4,825	311	3,146	91	1,969	27	7,682	35	20,860	1,100
Lower Murray Zone - Other	62	16	168	10	217	7	0	0	0	0	447	33
Mount Lofty Ranges												
Adelaide Hills	787	206	1,074	63	1,107	32	790	11	234	2	3,992	314
Adelaide Plains	166	50	124	9	75	2	122	2	175	1	663	64
Clare Valley	745	189	827	50	822	24	793	11	2,340	12	5,527	286
Mount Lofty Ranges Zone - Other	87	29	16	1	139	4	92	1	0	0	335	35
The Peninsulas	16	4	21	2	33	1	0	0	0	0	70	7
Southern Flinders Ranges	41	9	92	5	32	1	0	0	0	0	165	15
Grand Total	**9,442**	**2,133**	**13,494**	**857**	**12,568**	**370**	**11,450**	**162**	**29,541**	**127**	**76,495**	**3,649**

State summary

Estimated supply and committed intake 2012 - 2016 (cool climate regions outside the Riverland)

	2012				2014				2016			
	Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]		
Variety		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*
Red winegrapes												
Barbera	132	58	75	132	132	58	75	132	132	58	15	72
Cabernet Franc	1,509	539	439	978	1,509	460	367	827	1,509	460	367	827
Cabernet Sauvignon	90,393	42,243	43,674	85,917	90,402	40,257	25,852	66,109	90,402	38,375	13,690	52,065
Carignan	0	19	29	49	0	19	29	49	0	19	29	49
Grenache	10,303	3,329	5,600	8,929	10,303	3,361	3,470	6,831	10,303	3,366	2,948	6,314
Malbec	1,424	417	1,120	1,536	1,424	445	1,025	1,470	1,424	482	866	1,348
Mataro	2,336	685	1,446	2,130	2,336	734	1,256	1,990	2,336	738	1,210	1,949
Merlot	24,737	11,307	10,967	22,275	24,737	10,442	6,913	17,356	24,737	10,258	5,457	15,715
Meunier	217	82	266	348	217	82	105	186	217	41	38	79
Muscat a Petit Grains Rouge / Rose	0	3	0	3	0	3	0	3	0	3	0	3
Nebbiolo	206	153	82	235	206	156	23	179	206	156	0	156
Other Red	2,328	204	450	655	2,328	301	424	725	2,328	300	376	676
Petit Verdot	2,084	617	611	1,227	2,084	601	416	1,017	2,084	601	370	971
Pinot Noir	10,721	3,240	6,787	10,027	10,721	3,254	4,676	7,930	10,721	2,680	2,924	5,604
Ruby Cabernet	50	16	21	37	50	16	21	37	50	16	21	37
Sangiovese	1,623	496	1,049	1,545	1,623	514	541	1,055	1,623	536	363	900
Shiraz	144,143	45,450	65,945	111,395	144,143	44,907	39,565	84,471	144,143	42,675	28,317	70,992
Tempranillo	1,149	432	647	1,079	1,149	514	632	1,146	1,149	606		1,182
Touriga	0	37	43	79	0	57	51	108	0	57	41	97
Zinfandel	113	82	34	115	113	82	34	115	113	82	34	115
Total red winegrapes	**293,468**	**109,409**	**139,282**	**248,691**	**293,476**	**106,263**	**85,474**	**191,738**	**293,476**	**101,509**	**57,640**	**159,149**

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

[2] *A raising factor of 1.05 has been applied to committed intake to allow for non-respondents*

State summary

Estimated supply and committed intake 2012 - 2016 (cool climate regions outside the Riverland)

	2012				2014				2016			
	Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]		
Variety		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*
White winegrapes												
Chardonnay	52,157	18,937	23,838	42,775	52,157	15,858	13,272	29,130	52,157	13,692	8,088	21,780
Chenin Blanc	668	125	302	426	668	125	215	339	668	125	215	339
Colombard	289	147	105	251	289	147	105	251	289	147	105	251
Marsanne	234	139	90	229	234	139	90	229	234	139	90	229
Muscadelle	151	21	31	52	151	21	21	42	151	21	21	42
Muscat a Petit Grains Blanc	655	165	94	259	655	165	83	249	655	36	83	119
Muscat Gordo Blanco	25	33	72	105	25	33	72	105	25	33	72	105
Other White	2,812	256	603	859	2,812	312	628	940	2,812	316	601	917
Palomino	125	16	4	20	125	16	4	20	125	16	4	20
Pedro Ximenes	85	49	0	49	85	49	0	49	85	49	0	49
Pinot Gris	7,565	3,228	4,496	7,723	7,565	3,420	4,176	7,597	7,565	1,856	3,884	5,740
Riesling	20,366	10,106	8,827	18,933	20,366	10,027	6,302	16,328	20,366	8,956	3,700	12,656
Roussanne	154	100	101	200	154	103	106	209	154	103	111	214
Sauvignon Blanc	18,057	5,964	10,149	16,114	18,057	6,055	7,190	13,244	18,057	5,314	5,264	10,579
Semillon	11,639	2,381	4,938	7,319	11,639	2,372	3,251	5,623	11,639	1,932	2,784	4,716
Traminer	1,174	441	568	1,009	1,174	453	241	694	1,174	325	241	566
Trebbiano	0	0	5	5	0	0	5	5	0	0	5	5
Verdelho	1,386	517	494	1,011	1,386	502	326	828	1,386	307	178	485
Viognier	3,356	872	1,349	2,221	3,356	881	1,139	2,021	3,356	773	957	1,730
Total white winegrapes	**120,898**	**43,496**	**56,064**	**99,560**	**120,898**	**40,677**	**37,227**	**77,904**	**120,898**	**34,139**	**26,404**	**60,543**
All winegrapes	**414,366**	**152,905**	**195,346**	**348,251**	**414,374**	**146,941**	**122,701**	**269,641**	**414,374**	**135,648**	**84,045**	**219,692**

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

[2] *A raising factor of 1.05 has been applied to committed intake to allow for non-respondents*