

# 2006 South Australian Winegrape Utilisation and Pricing Survey

Phylloxera and Grape Industry Board of South Australia

## ACKNOWLEDGEMENTS

The production of this survey has been coordinated and funded by the Phylloxera and Grape Industry Board of South Australia. Some additional funding is provided by the Grape and Wine Research and Development Corporation, as part of the National Utilisation and Pricing Survey project.

The publication of this survey is made possible through the support of the South Australian and interstate wineries who processed fruit from South Australian vineyards in 2006. 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 are checked by regional industry representatives. Vintage reports have been provided by the regional representatives or their local committees. Particular thanks go to: Tom Ayers, Pete Balnaves, Peter Bird, Jim Caddy, Greg Koch, Robin Nettelbeck, John Pargeter, Craig Richards, Alex Sass, Kirsty Waller, David Watkins and Martin Wirper.

The survey publication is available on the Board's website [www.phylloxera.com.au](http://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.

## REPORT PREPARATION

Report prepared by Sandy Hathaway, Phylloxera and Grape Industry Board of SA.

## COPYRIGHT

This work is copyright. Apart from any use permitted under the Copyright Act 1969, no part of this publication may be reproduced by any process without the prior written permission of the Phylloxera and Grape Industry Board of South Australia.

© Phylloxera and Grape Industry Board of South Australia, 2006.

ISSN 1442-6048

Date of publication: October 2006

## DISCLAIMER

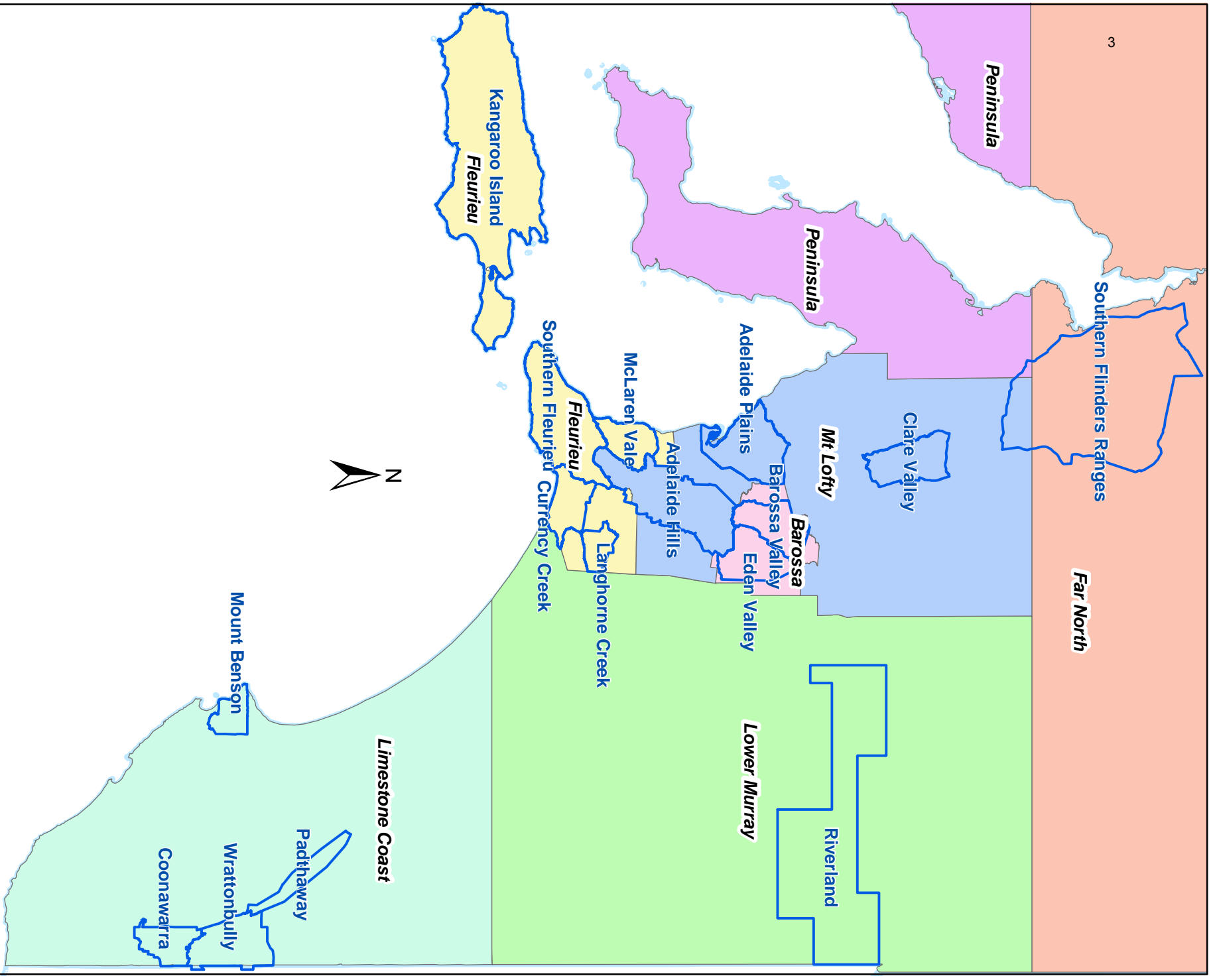
While every effort is made to ensure the accuracy and integrity of the information reported in this document, no responsibility is taken for any errors or omissions. The Phylloxera and Grape Industry Board of South Australia expressly disclaims any liability for the accuracy and sufficiency of the information, and in no circumstances shall it be held liable for the consequences of decisions, actions, assumptions and interpretations made by those who use the information contained within the report.

## DOCUMENT STRUCTURE AND LAYOUT

The survey report has been structured as a series of 15 separate PDF files. There are 14 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. A hard copy, combining all the separate reports, has not been published in 2006 due to budget constraints.

## INTERPRETATION OF REPORT INFORMATION

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



3

*Peninsula*

*Southern Flinders Ranges*

*Far North*

*Clare Valley*

*Mt Lofty*

*Barossa*

*Barossa Valley*

*Eden Valley*

*Adelaide Plains*

*Adelaide Hills*

*McLaren Vale*

*Southern Fleurieu*

*Currency Creek*

*Langhorne Creek*

*Kangaroo Island*  
*Fleurieu*

*Limestone Coast*

*Padthaway*

*Mount Benson*

*Wrattenbully*

*Coonawarra*



## GI Regions and Zones in South Australia

### Legend

Geographic Indications (Wine Regions)

GI Zones

Barossa  
Far North  
Fleurieu  
Limestone Coast  
Lower Murray  
Mt Lofty  
Peninsula

0 30 60 90 Kilometres

Map Produced by the Phyloxera & Grape Industry Board of SA, 2006  
Data Acknowledgements:  
GI Regions/ Zones - Aust. Wine & Brandy Corporation



# Explanations and Definitions

## INTAKE (CURRENT VINTAGE) DATA

### *Definition of regions*

Regions have been defined in accordance with declared or interim 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 Currency Creek, Southern Flinders Ranges 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 who source fruit from South Australian vineyards are included in the survey collection process. Reported fruit is separated into fruit produced from the winery's own vineyards ("own grown") and from independent grower owned 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 using planting data contained in the Phylloxera and Grape Industry Board's vineyard register – ie they are independent of the Utilisation and Pricing survey. Estimated bearing area is multiplied by expected yield per hectare, to give estimated production. The supply forecasts do not make any allowance for large-scale grubbing, yield capping or the effects of water restrictions/drought 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.

## *Demand (required intake)*

The **demand figure (required intake)** is the tonnage required by wineries to achieve sales forecasts. From 2006, demand figures are no longer reported for individual regions. This is because, for the majority of fruit purchased, the requirement is not specifically regional – but rather it is price/quality based and therefore interchangeable between regions. Demand (fruit requirement) is reported for “warm” vs “cool” climate fruit (Riverland vs. the rest of South Australia) and for the whole of South Australia. Therefore it is important to read the state summary report in conjunction with the individual regional reports.

The % required/committed intake shows the percentage of the wineries’ requirement that is *already* committed for a given year. Eg a figure of 83% indicates that wineries already have contracts (or own grown fruit) to supply 83% of their demand for that year.

Note: not all wineries provide estimates of future intakes - particularly for the later forecast years. Therefore forecasts for later years tend to underreport actual demand. The projections of future intake should be interpreted and used cautiously. It should be noted that there is considerable variation from one survey to the next in demand projections for the same future forecast year, as marketing indications change. The projections should only be interpreted as general indications of current levels of confidence, and trends in varietal preferences.

## PLANTING DATA

### *Derivation of planting data tables*

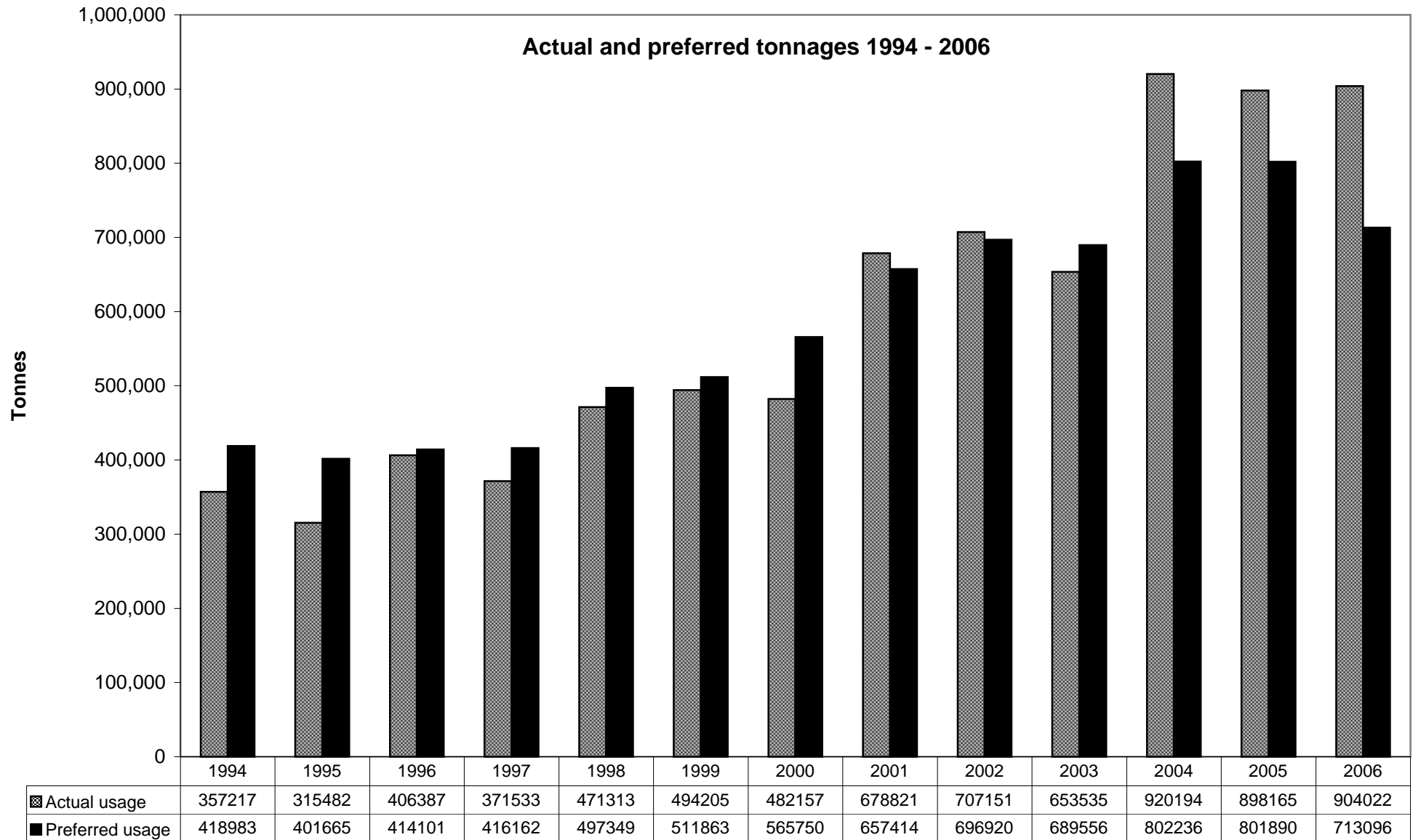
Planting data is **not** derived from the 2006 South Australian Utilisation and Pricing Survey of wineries. The information is obtained from the vineyard register maintained by the Phylloxera and Grape Industry Board of South Australia.

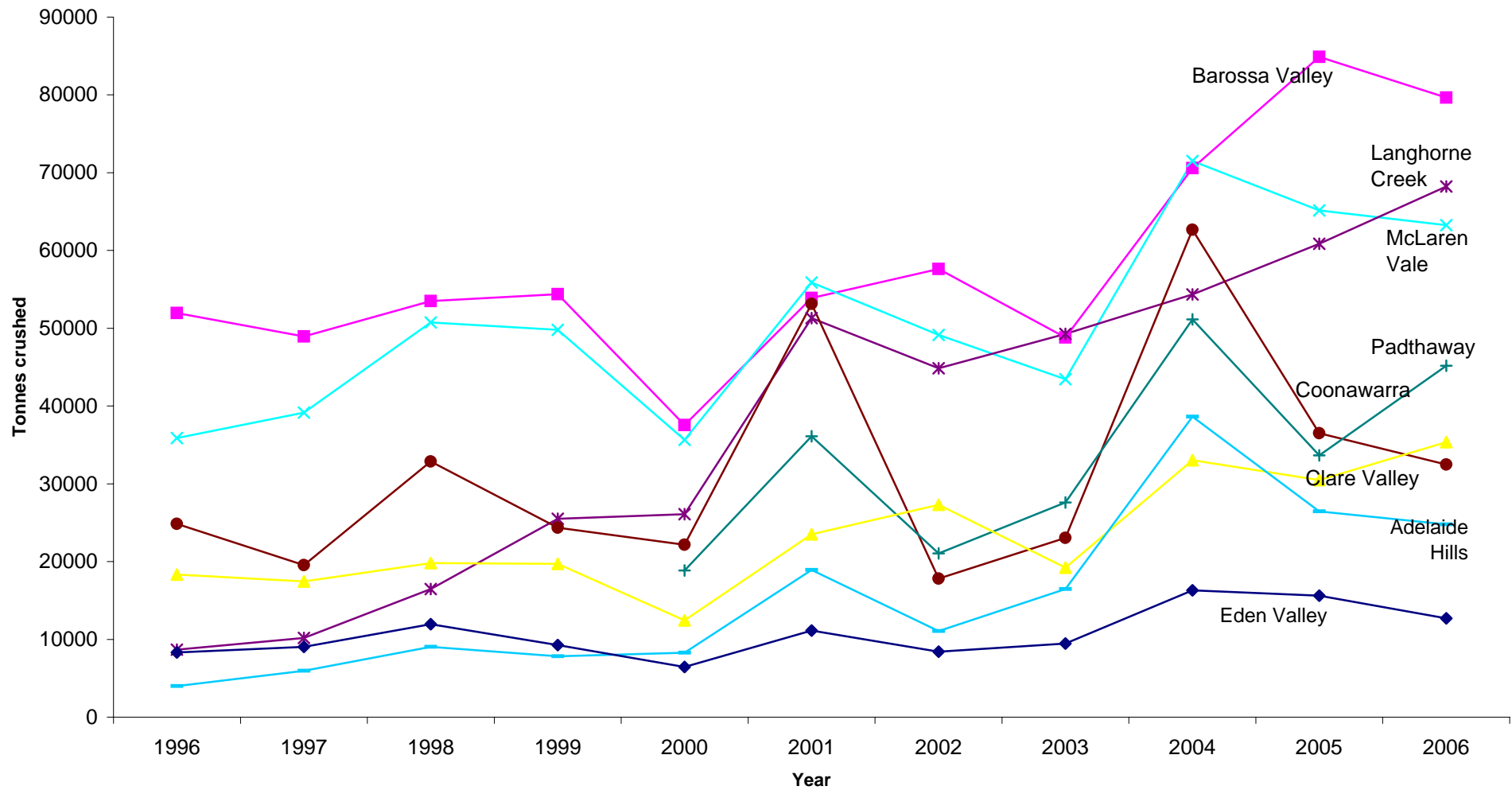
The Board is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of grapegrowers in the state. All vineyard owners with more than 0.5 hectares are required by law to register with the Board, and to complete an accurate vineyard return each year, giving 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.

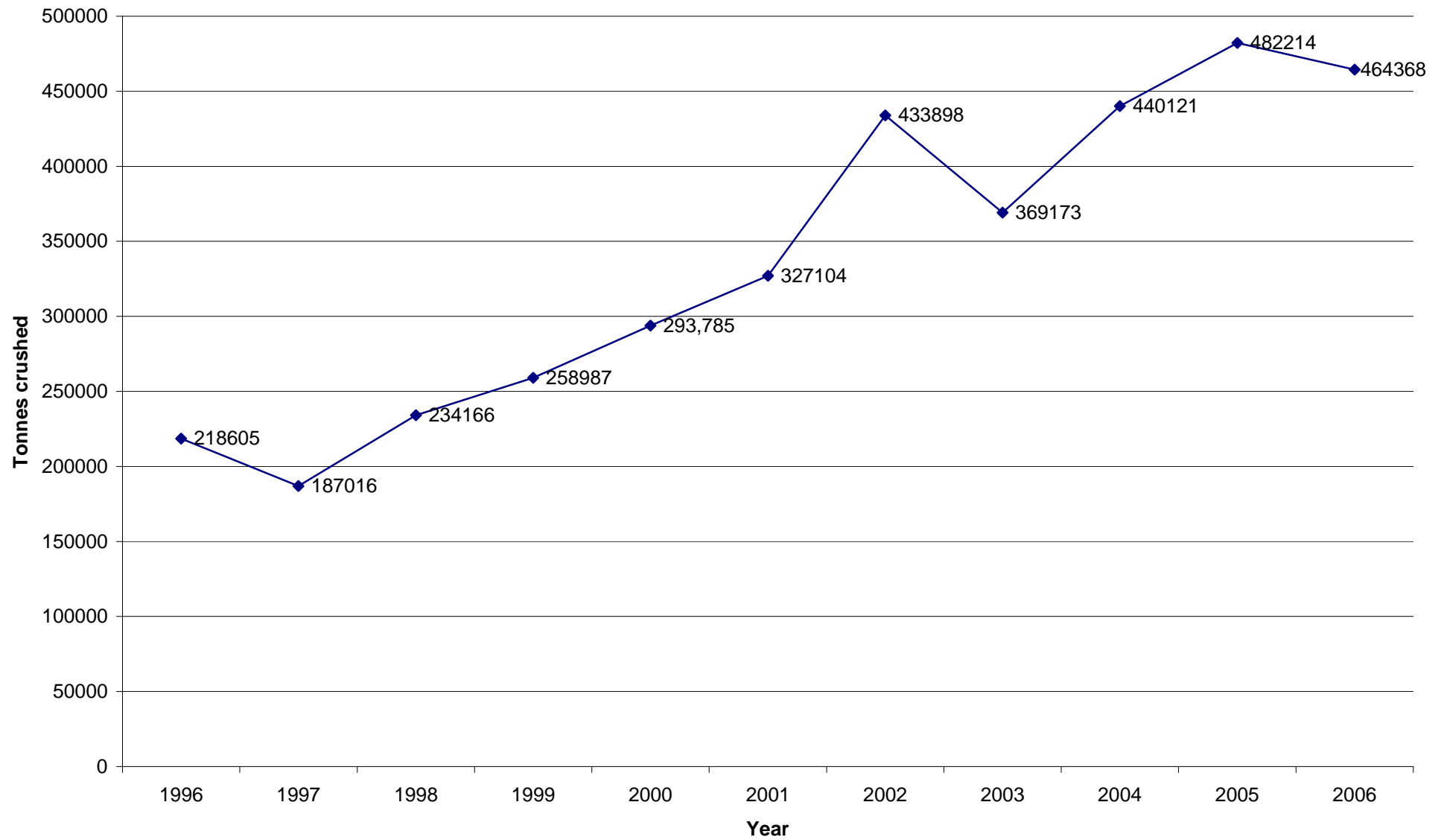
For more information on registration of vineyards, please contact the Phylloxera and Grape Industry Board office on 08 8362 0488.

### *Explanatory notes for planting data tables*

1. Planting data tables are current as at April 2006 and include all plantings from the 2005 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 2006 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.



*Not including the Riverland*





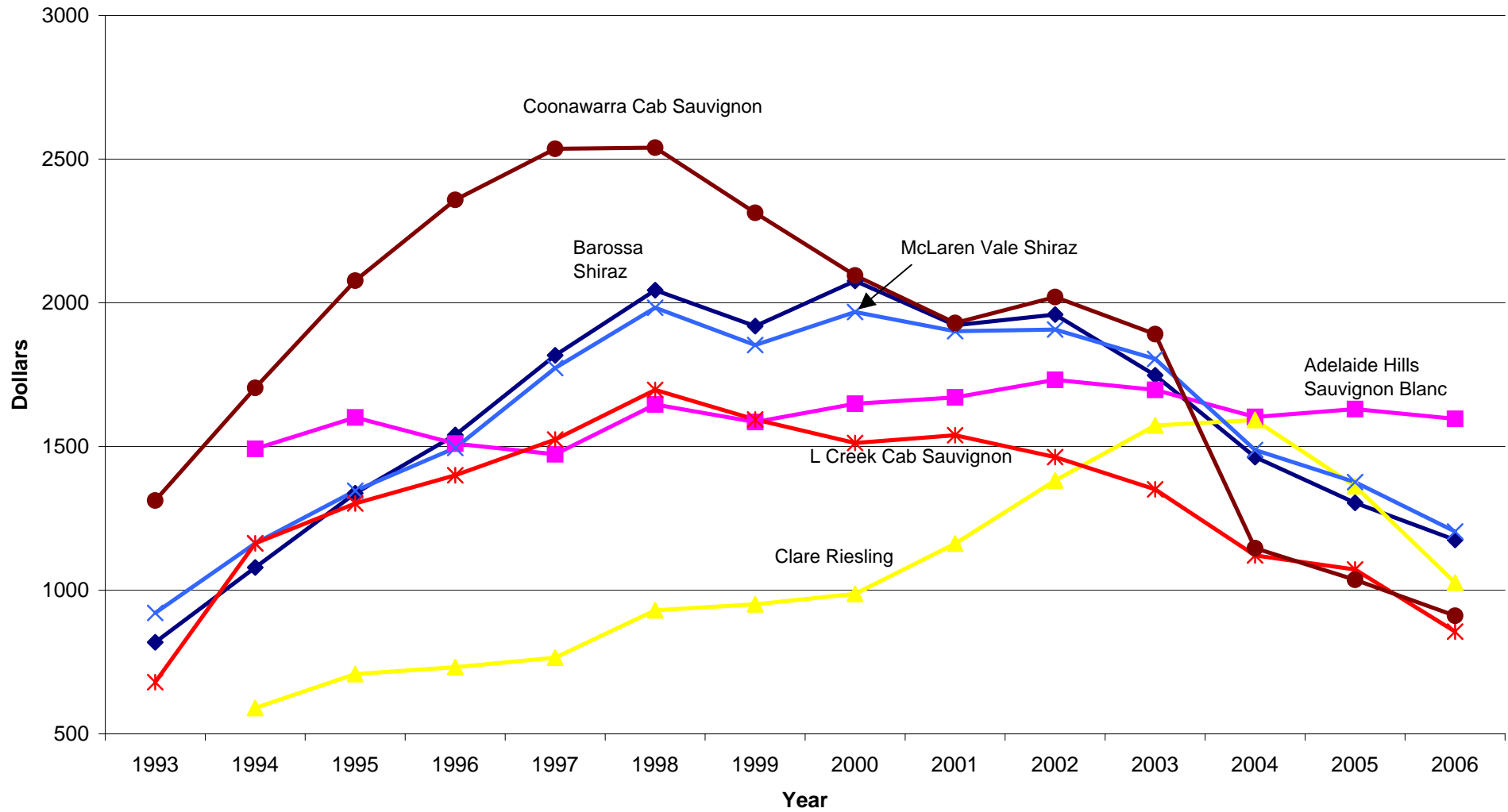
## State summary

## Total crush by region 2006

9

GI region	Winery grown (tonnes)	Purchased (tonnes)	Total tonnes crushed	% winery grown	% of state crush
Adelaide Hills	4560	20226	24786	18%	3%
Adelaide Plains	443	4437	4880	9%	1%
Barossa Valley	15795	61968	77764	20%	9%
Barossa zone - other	0	1886	1886	0%	0%
Bordertown	8250	10240	18490	45%	2%
Clare Valley	13648	21703	35351	39%	4%
Coonawarra	18415	14078	32493	57%	4%
Currency Creek	6747	3948	10696	63%	1%
Eden Valley	5331	7372	12703	42%	1%
Fleurieu zone - other	396	2150	2546	16%	0%
Kangaroo Island	193	46	238	81%	0%
Langhorne Creek	18988	49230	68218	28%	8%
Limestone Coast zone - other	3826	6459	10285	37%	1%
Lower Murray zone - other	169	1917	2086	8%	0%
McLaren Vale	21310	41948	63258	34%	7%
Mount Benson	1071	1579	2650	40%	0%
Mount Lofty Ranges zone - other	182	1372	1555	12%	0%
Padthaway	28165	17023	45188	62%	5%
Riverland	53733	410634	464368	12%	51%
Southern Fleurieu	221	938	1159	19%	0%
Southern Flinders Ranges	0	856	856	0%	0%
The Peninsulas	136	52	187	72%	0%
Wrattonbully	9822	12557	22379	44%	2%
<b>Total</b>	<b>211403</b>	<b>692619</b>	<b>904022</b>	<b>23%</b>	<b>100%</b>

## Major variety-region combinations

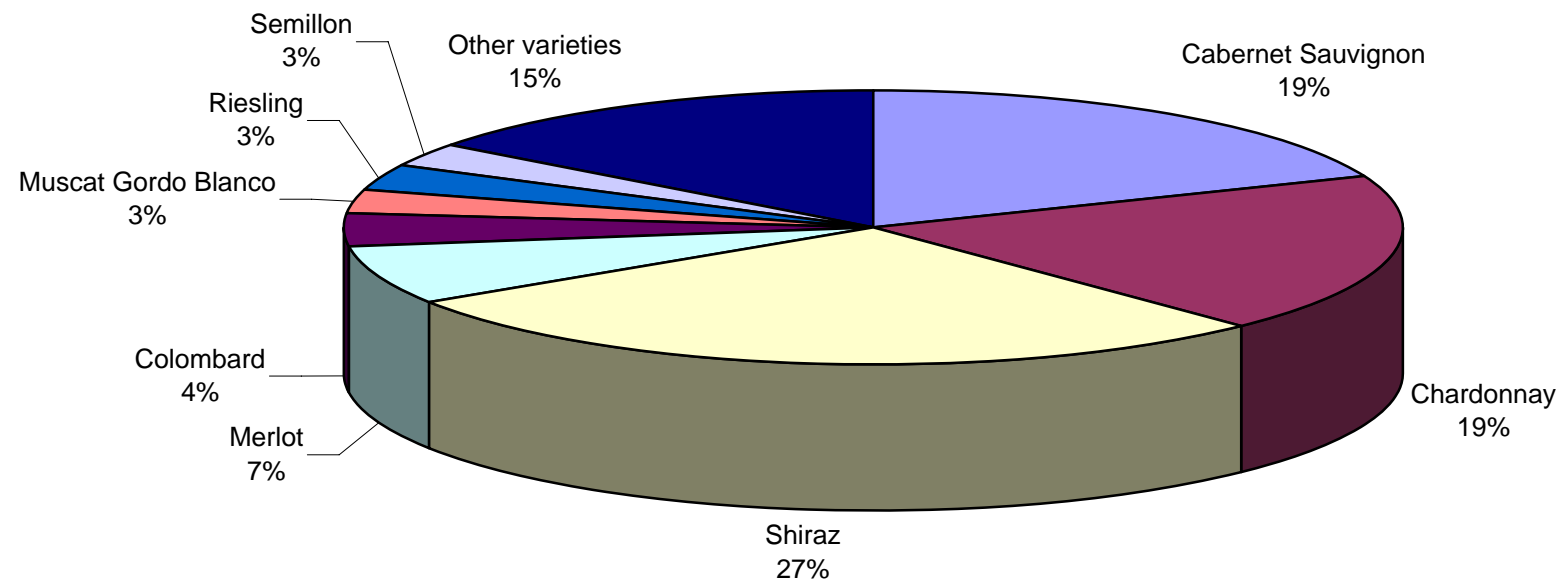


## State summary

## Vintage 2006 by variety

11

Variety	Tonnes purchased	Winery grown fruit	Total crushed	% purchased
<b>Red winegrapes</b>				
Cabernet Franc	728	1,246	1,975	37%
Cabernet Sauvignon	120,729	49,647	170,376	71%
Grenache	15,690	5,051	20,741	76%
Malbec	1,061	1,447	2,508	42%
Mataro	7,891	788	8,679	91%
Merlot	46,649	15,315	61,964	75%
Other Red	2,349	1,033	3,382	69%
Petit Verdot	15,607	1,713	17,320	90%
Pinot Noir	13,202	3,508	16,710	79%
Ruby Cabernet	8,405	1,415	9,820	86%
Sangiovese	1,338	910	2,248	60%
Shiraz	198,363	55,353	253,716	78%
Tempranillo	842	233	1,075	78%
<b>Total red winegrapes</b>	<b>432,856</b>	<b>137,657</b>	<b>570,513</b>	<b>76%</b>
<i>% of grand total</i>	<i>62%</i>	<i>65%</i>	<i>63%</i>	
<b>White winegrapes</b>				
Chardonnay	135,959	36,113	172,072	79%
Chenin Blanc	4,678	621	5,299	88%
Colombard	32,295	2,686	34,981	92%
Muscat Gordo Blanco	24,475	557	25,032	98%
Other White	4,247	2,891	7,138	59%
Pinot Gris	933	956	1,888	49%
Riesling	15,827	12,034	27,861	57%
Sauvignon Blanc	11,033	6,648	17,681	62%
Semillon	17,432	8,606	26,038	67%
Sultana	3,013	16	3,029	99%
Traminer	3,249	945	4,194	77%
Verdelho	4,092	803	4,895	84%
Viognier	2,529	870	3,400	74%
<b>Total white winegrapes</b>	<b>259,763</b>	<b>73,746</b>	<b>333,510</b>	<b>78%</b>
<i>% grand total</i>	<i>38%</i>	<i>35%</i>	<i>37%</i>	
<b>Total all winegrapes</b>	<b>692,619</b>	<b>211,403</b>	<b>904,022</b>	<b>77%</b>



## State summary

## Vintage summary by region 2006

13

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Adelaide Hills	Red	1,138	9,470	10,608	\$12,442,222	\$13,988,216
	White	3,422	10,756	14,179	\$14,886,084	\$19,987,044
	<b>All</b>	<b>4,560</b>	<b>20,226</b>	<b>24,786</b>	<b>\$27,328,306</b>	<b>\$33,975,260</b>
Adelaide Plains	Red	140	2,615	2,755	\$1,865,893	\$1,974,557
	White	303	1,822	2,125	\$1,539,930	\$1,751,696
	<b>All</b>	<b>443</b>	<b>4,437</b>	<b>4,880</b>	<b>\$3,405,823</b>	<b>\$3,726,254</b>
Barossa Valley	Red	11,642	46,494	58,136	\$48,759,664	\$60,737,169
	White	4,154	17,360	21,514	\$12,374,362	\$15,428,845
	<b>All</b>	<b>15,795</b>	<b>63,854</b>	<b>79,649</b>	<b>\$61,134,026</b>	<b>\$76,166,014</b>
Clare Valley	Red	8,498	14,316	22,814	\$15,904,056	\$25,016,351
	White	5,150	7,388	12,538	\$7,610,011	\$12,904,020
	<b>All</b>	<b>13,648</b>	<b>21,703</b>	<b>35,351</b>	<b>\$23,514,067</b>	<b>\$37,920,370</b>
Coonawarra	Red	14,714	12,589	27,303	\$10,708,049	\$22,990,518
	White	3,700	1,489	5,190	\$1,388,177	\$4,638,537
	<b>All</b>	<b>18,415</b>	<b>14,078</b>	<b>32,493</b>	<b>\$12,096,226</b>	<b>\$27,629,055</b>
Eden Valley	Red	2,247	3,834	6,081	\$4,317,299	\$6,679,564
	White	3,084	3,538	6,621	\$3,981,697	\$7,438,481
	<b>All</b>	<b>5,331</b>	<b>7,372</b>	<b>12,703</b>	<b>\$8,298,996</b>	<b>\$14,118,045</b>
Fleurieu zone - other	Red	6,332	5,604	11,937	\$4,881,990	\$10,009,606
	White	1,225	1,477	2,703	\$1,533,231	\$2,755,420
	<b>All</b>	<b>7,558</b>	<b>7,082</b>	<b>14,639</b>	<b>\$6,415,221</b>	<b>\$12,765,026</b>



## State summary

## Vintage summary by region 2006

14

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Langhorne Creek	Red	15,356	40,192	55,548	\$38,660,115	\$52,924,918
	White	3,632	9,038	12,670	\$7,750,306	\$10,825,857
	<b>All</b>	<b>18,988</b>	<b>49,230</b>	<b>68,218</b>	<b>\$46,410,421</b>	<b>\$63,750,775</b>
Limestone Coast zone - other	Red	10,419	16,542	26,961	\$14,568,520	\$23,667,107
	White	2,729	1,735	4,464	\$1,591,822	\$3,935,830
	<b>All</b>	<b>13,148</b>	<b>18,278</b>	<b>31,425</b>	<b>\$16,160,342</b>	<b>\$27,602,937</b>
McLaren Vale	Red	16,780	33,732	50,512	\$38,009,644	\$56,956,167
	White	4,530	8,215	12,746	\$8,013,910	\$12,482,369
	<b>All</b>	<b>21,310</b>	<b>41,948</b>	<b>63,258</b>	<b>\$46,023,554</b>	<b>\$69,438,536</b>
Padthaway	Red	12,802	11,088	23,890	\$9,869,880	\$21,133,168
	White	15,363	5,935	21,298	\$4,554,987	\$16,761,298
	<b>All</b>	<b>28,165</b>	<b>17,023</b>	<b>45,188</b>	<b>\$14,424,867</b>	<b>\$37,894,466</b>
Riverland	Red	28,554	222,861	251,415	\$82,651,913	\$93,138,868
	White	25,180	187,773	212,953	\$72,029,271	\$82,017,122
	<b>All</b>	<b>53,733</b>	<b>410,634</b>	<b>464,368</b>	<b>\$154,681,183</b>	<b>\$175,155,990</b>
SA - other	Red	311	3,159	3,470	\$2,219,002	\$2,440,432
	White	177	1,038	1,215	\$391,190	\$458,017
	<b>All</b>	<b>488</b>	<b>4,197</b>	<b>4,685</b>	<b>\$2,610,192</b>	<b>\$2,898,449</b>
Wrattonbully	Red	8,724	10,360	19,084	\$11,753,120	\$21,604,487
	White	1,098	2,197	3,295	\$2,269,474	\$3,383,312
	<b>All</b>	<b>9,822</b>	<b>12,557</b>	<b>22,379</b>	<b>\$14,022,594</b>	<b>\$24,987,798</b>
<b>All regions</b>		<b>211,403</b>	<b>692,619</b>	<b>904,022</b>	<b>\$436,525,817</b>	<b>\$608,028,975</b>

		Current area in hectares by year planted					% planted in	% of state
Zone	Region	Pre-2003	2003	2004	2005	Total	2005	plantings
<b>Mount Lofty</b>	Adelaide Hills	3277	176	155	110	3718	3%	5.0%
	Adelaide Plains	519	45	8	0	573	0%	0.8%
	Clare Valley	5071	258	149	20	5499	0%	7.4%
	Mount Lofty Zone - other	260	15	7	2	284	1%	0.4%
	Total for Mount Lofty Zone	9128	494	320	132	10074	1%	13.5%
<b>Barossa</b>	Barossa Valley	9237	502	297	225	10261	2%	13.8%
	Eden Valley	2170	47	36	23	2277	1%	3.1%
	Barossa Zone - other	105	0	0	0	105	0%	0.1%
	Total for Barossa Zone	11512	550	333	248	12643	2%	16.9%
<b>Fleurieu</b>	Currency Creek	743	44	77	15	878	2%	1.2%
	Kangaroo Island	105	6	2	0	113	0%	0.2%
	Langhorne Creek	5707	226	161	52	6146	1%	8.2%
	McLaren Vale	6571	112	124	47	6854	1%	9.2%
	Southern Fleurieu	367	17	7	3	394	1%	0.5%
	Fleurieu Zone - other	140	0	66	0	206	0%	0.3%
	Total for Fleurieu Zone	13633	405	437	117	14591	1%	19.6%
<b>Lower Murray</b>	Riverland	19827	811	614	400	21652	2%	29.0%
	Lower Murray Zone - other	431	11	18	1	461	0%	0.6%
	Total for Lower Murray Zone	20259	822	632	401	22113	2%	29.6%
<b>Limestone Coast</b>	Bordertown	1240	2	22	11	1274	1%	1.7%
	Coonawarra	5401	173	101	10	5685	0%	7.6%
	Mount Benson	436	18	13	3	471	1%	0.6%
	Padthaway	3508	130	112	52	3801	1%	5.1%
	Wrattonbully	2372	89	26	22	2509	1%	3.4%
	Limestone Coast Zone - other	1186	25	17	25	1253	2%	1.7%
	Total for Limestone Coast Zone	14142	437	291	122	14993	1%	20.1%
<b>Far North</b>		164	0	8	0	172	0%	0.2%
<b>Peninsulas</b>		27	3	5	0	35	0%	0.0%
<b>All zones</b>	<b>Total for All GIs</b>	<b>68865</b>	<b>2711</b>	<b>2025</b>	<b>1020</b>	<b>74620</b>	<b>1%</b>	<b>100.0%</b>

## State summary

## Number of growers and total plantings by property size

16

	Property size in hectares									
	< 10 ha		10 - 24 ha		25 - 49 ha		50+ ha		Total	
	Number of growers	Area (ha)	Number of growers	Area (ha)	Number of growers	Area (ha)	Number of growers	Area (ha)	Number of growers	Area (ha)
<b>GI region</b>										
Adelaide Hills	190	731	64	1079	30	1004	12	899	296	3713
Adelaide Plains	16	65	8	115	3	114	3	276	30	571
Barossa Valley	325	1419	154	2494	78	2601	27	3740	584	10254
Barossa Zone - other	3	8	1	14	0	0	1	83	5	105
Bordertown	0	0	0	0	1	43	5	1231	6	1274
Clare Valley	161	681	64	1038	19	636	21	3145	265	5501
Coonawarra	46	260	35	521	18	613	25	4291	124	5685
Currency Creek	7	43	8	120	4	145	3	571	22	878
Eden Valley	86	385	25	378	11	357	9	1156	131	2277
Fleurieu Zone - other	8	24	3	52	1	39	1	93	13	208
Kangaroo Island	16	91	2	22	0	0	0	0	18	113
Langhorne Creek	20	105	27	451	25	908	30	4685	102	6148
Limestone Coast Zone - other	23	112	8	113	5	172	7	851	43	1247
Lower Murray Zone - other	14	65	7	114	9	279	0	0	30	458
Mclaren Vale	302	1319	90	1452	43	1412	25	2616	460	6799
Mount Benson	3	24	4	64	5	159	3	224	15	471
Mount Lofty Zone - other	19	62	2	28	3	97	1	97	25	284
Padthaway	3	17	4	57	4	150	15	3577	26	3801
Riverland	749	3809	360	5506	88	2980	57	9225	1254	21520
Southern Fleurieu	27	78	7	82	5	166	1	68	40	394
Southern Flinders Ranges	10	44	5	92	1	32	0	0	16	168
The Peninsulas Zone	4	14	2	21	0	0	0	0	6	35
Wrattonbully	10	54	20	357	12	428	10	1670	52	2509
<b>Grand Total</b>	<b>2042</b>	<b>9409</b>	<b>900</b>	<b>14171</b>	<b>365</b>	<b>12336</b>	<b>256</b>	<b>38499</b>	<b>3563</b>	<b>74414</b>
<i>% of total</i>	<i>57%</i>	<i>13%</i>	<i>25%</i>	<i>19%</i>	<i>10%</i>	<i>17%</i>	<i>7%</i>	<i>52%</i>	<i>100%</i>	<i>100%</i>

# State summary

# Current plantings and production forecasts by variety 2006

17

Variety	Current area in hectares by year planted					Production 2006	Av yield 2006 <sup>1</sup>	Estimated production 2007 - 2011				
	Bearing	Non-bearing in 2006			Total			2007	2008	2009	2010	2011
	Pre-2003	2003	2004	2005								
RED WINEGRAPES												
CABERNET FRANC	207	0	0	0	208	1975	10	1975	1977	1977	2017	2057
CABERNET SAUVIGNON	16874	167	77	9	17128	170376	10	172066	172839	172934	176393	179921
GRENACHE	1859	28	5	21	1913	20741	11	21057	21113	21343	21770	22205
MALBEC	282	2	4	0	288	2508	9	2526	2564	2564	2616	2668
MATARO (MOURVEDRE)	643	8	9	5	665	8679	14	8786	8913	8984	9164	9347
MERLOT	4313	143	45	36	4536	61964	14	64015	64657	65175	66478	67808
PETIT VERDOT	924	5	2	0	931	17320	19	17420	17462	17462	17811	18167
PINOT NOIR	1355	9	14	13	1391	16710	12	16821	16996	17155	17499	17848
RUBY CABERNET	506	0	0	4	510	9820	19	9820	9820	9897	10095	10296
SANGIOVESE	211	1	5	4	221	2248	11	2256	2310	2352	2399	2447
SHIRAZ	21792	829	533	270	23424	253716	12	263362	269570	272709	278163	283726
TEMPRANILLO	123	14	8	3	147	1075	9	1197	1266	1288	1313	1340
OTHER RED	424	12	21	32	488	3382	8	3478	3645	3900	3978	4058
TOTAL RED WINEGRAPES	49512	1218	724	396	51849	570514	12	584548	592885	597452	609401	621589
WHITE WINEGRAPES												
CHARDONNAY	9148	915	814	224	11101	172072	19	189284	204598	208804	212980	217240
CHENIN BLANC	238	0	0	0	239	5299	22	5299	5306	5306	5412	5520
COLOMBARD	905	31	13	10	959	34981	39	36188	36673	37063	37804	38560
MUSCAT GORDO BLANCO	1052	24	18	25	1118	25032	24	25595	26023	26623	27155	27698
PINOT GRIS	99	61	75	56	291	1888	19	3059	4489	5568	5680	5793
RIESLING	2873	230	138	63	3303	27861	10	30089	31431	32038	32679	33333
SAUVIGNON BLANC	1272	135	170	130	1707	17681	14	19559	21916	23722	24196	24680
SEMILLON	1664	8	18	7	1698	26038	16	26166	26446	26563	27094	27636
TRAMINER	232	22	1	4	259	4194	18	4591	4601	4683	4776	4872
VERDELHO	284	2	1	4	291	4895	17	4923	4947	5022	5123	5225
VIOGNIER	335	39	39	75	488	3400	10	3791	4183	4945	5044	5145
OTHER WHITE	1145	25	12	13	1194	10167	9	10385	10492	10607	10819	11036
TOTAL WHITE WINEGRAPES	19246	1491	1298	612	22647	333508	17	359345	381842	392454	400303	408310
TOTAL ALL WINEGRAPES	68757	2709	2022	1009	74496	904022	13	943893	974728	989906	1009704	1029898
TABLE GRAPES - RED	42	0	0	0	42							
TABLE GRAPES - WHITE	27	0	0	0	27							
ROOTSTOCK BLOCK	40	1	3	12	55							
TOTAL ALL VARIETIES	68865	2711	2025	1020	74620							

<sup>1</sup> Calculated as production divided by bearing area

Variety	2007				2009				2011			
	Est Supply <sup>1</sup>	Winery grown grapes	Contract purchases <sup>2</sup>	Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Winery grown grapes	Contract purchases <sup>2</sup>	Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Winery grown grapes	Contract purchases <sup>2</sup>	Available supply <sup>3</sup>
<b>RED WINEGRAPES</b>												
Cabernet Franc	0	0	86	-86	0	0	86	-86	0	0	86	-86
Cabernet Sauvignon	68,665	8,973	50,433	9,258	68,751	9,249	46,264	13,238	71,529	9,520	42,158	19,851
Grenache	14,106	1,051	6,308	6,747	14,184	1,051	5,187	7,946	14,757	1,051	4,576	9,130
Malbec	1,348	268	375	705	1,351	268	339	744	1,406	268	339	799
Mataro	9,101	10	4,487	4,604	9,101	10	3,113	5,978	9,468	10	2,586	6,873
Merlot	24,585	2,298	21,964	323	24,899	2,372	20,316	2,211	25,905	2,376	17,844	5,685
Other Red	5,367	552	632	4,183	5,842	560	634	4,648	6,078	566	466	5,046
Petit Verdot	15,454	925	9,509	5,019	15,454	1,002	8,475	5,977	16,078	1,017	7,396	7,665
Pinot Noir	4,570	300	5,954	-1,684	4,945	300	5,869	-1,224	5,144	300	5,700	-856
Ruby Cabernet	12,152	1,229	4,387	6,536	12,300	1,242	2,990	8,068	12,797	1,256	2,751	8,790
Sangiovese	0	387	246	-633	0	391	185	-576	0	395	185	-580
Shiraz	114,222	12,681	83,437	18,104	118,890	13,056	78,156	27,679	123,693	13,396	69,349	40,949
Tempranillo	0	1	382	-383	0	5	382	-387	0	6	100	-106
<b>Total red winegrapes</b>	<b>269,568</b>	<b>28,676</b>	<b>188,199</b>	<b>52,694</b>	<b>275,718</b>	<b>29,506</b>	<b>171,995</b>	<b>74,217</b>	<b>286,857</b>	<b>30,161</b>	<b>153,535</b>	<b>103,161</b>
<b>WHITE WINEGRAPES</b>												
Chardonnay	110,598	10,389	99,220	989	119,382	11,184	92,989	15,209	124,205	11,335	80,186	32,684
Chenin Blanc	4,213	625	3,573	15	4,213	625	2,765	823	4,383	625	2,304	1,454
Colombard	27,576	2,102	30,262	-4,788	28,185	2,152	28,813	-2,779	29,324	2,152	26,884	288
Muscat Gordo Blanco	29,967	574	23,590	5,803	31,204	2,574	19,960	8,670	32,465	2,574	16,984	12,907
Other White	11,810	2,639	3,840	5,331	12,057	2,639	4,965	4,453	12,544	2,732	4,325	5,487
Pinot Gris	0	0	118	-118	167	100	208	-141	174	278	208	-312
Riesling	5,282	919	3,822	541	5,296	931	3,599	766	5,510	947	3,451	1,112
Sauvignon Blanc	4,471	2,313	3,856	-1,699	5,047	2,716	4,505	-2,174	5,251	2,806	4,101	-1,656
Semillon	10,175	4,097	6,116	-38	10,449	4,097	6,288	64	10,871	4,097	6,087	687
Sultana	11,221	55	2,457	8,709	11,265	55	1,816	9,394	11,720	55	1,565	10,100
Traminer	2,732	373	1,670	689	2,894	373	1,687	834	3,010	373	1,607	1,030
Verdelho	2,938	75	2,326	537	2,988	75	1,891	1,022	3,109	75	1,719	1,315
Viognier	1,118	432	1,299	-614	1,664	601	2,021	-958	1,731	608	1,451	-328
<b>Total white winegrapes</b>	<b>222,100</b>	<b>24,593</b>	<b>182,149</b>	<b>15,358</b>	<b>234,811</b>	<b>28,122</b>	<b>171,507</b>	<b>35,182</b>	<b>244,297</b>	<b>28,657</b>	<b>150,872</b>	<b>64,768</b>
<b>Total all winegrapes</b>	<b>491,669</b>	<b>53,269</b>	<b>370,348</b>	<b>68,052</b>	<b>510,528</b>	<b>57,628</b>	<b>343,502</b>	<b>109,399</b>	<b>531,154</b>	<b>58,818</b>	<b>304,407</b>	<b>167,929</b>

<sup>1</sup> Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)

<sup>2</sup> Contracts already in place - not intended contracts

<sup>3</sup> A negative number indicates supply forecast is below wineries' estimated commitment



## Cool climate

## Estimated supply and fruit availability 2007 - 2011

19

NB Cool climate incorporates all winegrowing regions in South Australia except the Riverland

Variety	2007				2009				2011			
	Est Supply <sup>1</sup>	Winery grown grapes	Contract purchases <sup>2</sup>	Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Winery grown grapes	Contract purchases <sup>2</sup>	Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Winery grown grapes	Contract purchases <sup>2</sup>	Available supply <sup>3</sup>
<b>RED WINEGRAPES</b>												
Cabernet Franc	1,622	1,248	521	-147	1,623	1,245	422	-44	1,635	1,222	380	32
Cabernet Sauvignon	110,911	44,608	57,501	8,802	111,768	45,523	39,507	26,738	112,432	45,767	31,638	35,028
Grenache	11,422	3,644	6,587	1,191	11,612	3,760	4,828	3,024	11,816	3,942	4,710	3,165
Malbec	1,854	1,639	529	-314	1,886	1,227	479	180	1,895	1,227	452	217
Mataro	2,274	931	1,223	120	2,388	961	927	500	2,422	960	921	541
Merlot	28,560	12,232	17,180	-851	29,334	12,813	14,251	2,270	29,545	13,204	12,484	3,857
Other Red	2,816	802	1,463	551	3,186	871	1,252	1,063	3,307	830	1,188	1,289
Petit Verdot	2,484	1,139	1,770	-425	2,499	751	1,276	472	2,522	768	1,222	531
Pinot Noir	10,100	3,334	6,001	765	10,171	3,383	4,016	2,772	10,215	3,441	3,757	3,016
Ruby Cabernet	24	23	40	-39	24	23	40	-39	25	8	0	17
Sangiovese	1,422	419	910	93	1,504	429	642	432	1,521	401	247	873
Shiraz	148,537	44,215	97,179	7,142	153,775	46,205	69,896	37,675	155,571	47,479	61,791	46,301
<b>Total red winegrapes</b>	<b>322,025</b>	<b>114,233</b>	<b>190,904</b>	<b>16,888</b>	<b>329,769</b>	<b>117,191</b>	<b>137,536</b>	<b>75,042</b>	<b>332,905</b>	<b>119,249</b>	<b>118,789</b>	<b>94,867</b>
<b>WHITE WINEGRAPES</b>												
Chardonnay	61,922	22,868	32,249	6,806	67,004	23,550	26,350	17,104	67,520	24,426	21,031	22,062
Chenin Blanc	630	88	519	23	634	88	402	144	647	68	267	312
Colombard	10	220	151	-361	10	224	80	-294	11	232	80	-301
Other White	2,966	552	696	1,716	3,185	562	556	2,067	3,241	566	566	2,109
Pinot Gris	1,673	1,062	844	-233	2,747	1,306	1,171	270	2,899	1,576	1,074	249
Riesling	27,771	12,435	14,925	411	29,986	12,946	13,950	3,090	30,165	13,126	12,196	4,844
Sauvignon Blanc	14,442	4,797	7,650	1,995	18,108	5,094	7,143	5,871	19,720	5,368	6,643	7,709
Semillon	15,588	3,166	10,288	2,133	15,736	3,304	7,757	4,676	15,967	3,365	7,594	5,008
Traminer	1,118	619	814	-315	1,175	642	435	98	1,179	642	345	192
Verdelho	1,823	602	1,226	-4	1,852	622	1,108	122	1,878	634	841	403
Viognier	2,619	582	2,006	31	3,482	653	1,940	888	3,584	664	1,707	1,212
<b>White winegrapes</b>	<b>130,563</b>	<b>46,992</b>	<b>71,366</b>	<b>12,204</b>	<b>143,919</b>	<b>48,991</b>	<b>60,891</b>	<b>34,037</b>	<b>146,810</b>	<b>50,668</b>	<b>52,343</b>	<b>43,799</b>
<b>Total all winegrapes</b>	<b>452,587</b>	<b>161,225</b>	<b>262,270</b>	<b>29,093</b>	<b>473,688</b>	<b>166,182</b>	<b>198,427</b>	<b>109,079</b>	<b>479,714</b>	<b>169,917</b>	<b>171,132</b>	<b>138,666</b>

## State summary

## Supply and demand by variety for South Australia 2007 - 2011

20

Variety	Year	Winery grown grapes	Contract purchases	Total committed intake	Total required intake (Demand)	% required intake that is contracted	Forecast supply	Net surplus/ shortfall <sup>1</sup>
Cabernet Sauvignon	2007	53,581	107,934	161,515	138,754	116%	179,575	18,060
	2008	54,587	94,357	148,944	144,539	103%	180,428	31,484
	2009	54,772	85,771	140,543	151,117	93%	180,520	29,403
	2010	54,953	80,050	135,003	156,049	87%	182,112	26,064
	2011	55,287	73,796	129,082	155,627	83%	183,961	28,334
Grenache	2007	4,695	12,895	17,590	13,128	134%	25,527	7,938
	2008	4,679	10,897	15,576	14,349	109%	25,651	10,075
	2009	4,811	10,015	14,826	14,740	101%	25,796	10,969
	2010	4,908	9,730	14,637	14,906	98%	26,174	11,269
	2011	4,993	9,286	14,278	14,857	96%	26,573	11,717
Merlot	2007	14,530	39,144	53,674	44,447	121%	53,145	-528
	2008	14,757	37,302	52,059	46,175	113%	53,875	1,816
	2009	15,185	34,567	49,752	47,031	106%	54,233	4,481
	2010	15,397	32,895	48,292	48,799	99%	54,825	6,027
	2011	15,580	30,328	45,908	48,022	96%	55,450	7,428
Pinot Noir	2007	3,634	11,955	15,589	17,956	87%	14,670	-3,286
	2008	3,695	10,504	14,199	16,266	87%	14,911	-1,354
	2009	3,683	9,885	13,568	16,823	81%	15,115	-1,708
	2010	3,626	9,610	13,236	17,354	76%	15,241	-2,113
	2011	3,741	9,457	13,198	16,744	79%	15,359	-1,385
Shiraz	2007	56,896	180,616	237,512	201,424	118%	262,758	25,246
	2008	58,125	161,517	219,642	218,795	100%	269,260	49,618
	2009	59,261	148,051	207,312	237,617	87%	272,665	35,049
	2010	60,131	138,110	198,241	241,681	82%	275,849	34,168
	2011	60,875	131,140	192,015	247,665	78%	279,265	31,600
All other red varieties	2007	9,572	26,559	36,132	21,941	165%	55,917	19,785
	2008	8,893	23,627	32,520	21,693	150%	56,502	23,982
	2009	8,986	21,241	30,227	21,519	140%	57,158	26,931
	2010	8,863	19,288	28,151	21,161	133%	58,181	30,030
	2011	8,934	18,318	27,252	20,627	132%	59,154	31,901
<b>Total red winegrapes</b>	<b>2007</b>	<b>142,908</b>	<b>379,103</b>	<b>522,011</b>	<b>437,650</b>	<b>119%</b>	<b>591,593</b>	<b>69,582</b>
	<b>2008</b>	<b>144,734</b>	<b>338,206</b>	<b>482,940</b>	<b>461,816</b>	<b>105%</b>	<b>600,627</b>	<b>117,687</b>
	<b>2009</b>	<b>146,697</b>	<b>309,531</b>	<b>456,228</b>	<b>488,845</b>	<b>93%</b>	<b>605,487</b>	<b>116,641</b>
	<b>2010</b>	<b>147,877</b>	<b>289,683</b>	<b>437,560</b>	<b>499,949</b>	<b>88%</b>	<b>612,383</b>	<b>112,434</b>
	<b>2011</b>	<b>149,410</b>	<b>272,324</b>	<b>421,733</b>	<b>503,541</b>	<b>84%</b>	<b>619,761</b>	<b>116,220</b>

<sup>1</sup> Difference between supply and either committed intake or demand - whichever is higher

## State summary

## Supply and demand by variety for South Australia 2007 - 2011

21

Variety	Year	Winery grown grapes	Contract purchases	Total committed intake	Total required intake (Demand)	% required intake that is contracted	Forecast supply	Net surplus/ shortfall <sup>1</sup>
Chardonnay	2007	33,257	131,469	164,725	144,596	114%	172,520	7,795
	2008	34,291	127,751	162,042	152,139	107%	182,365	20,323
	2009	34,734	119,339	154,073	151,725	102%	186,385	32,312
	2010	34,813	107,399	142,213	153,458	93%	188,995	35,536
	2011	35,761	101,217	136,979	152,668	90%	191,724	39,056
Riesling	2007	13,354	18,747	32,101	27,616	116%	33,053	952
	2008	13,576	18,042	31,618	29,880	106%	34,357	2,738
	2009	13,877	17,549	31,426	30,627	103%	35,281	3,855
	2010	13,979	17,308	31,286	31,299	100%	35,481	4,182
	2011	14,073	15,647	29,719	30,503	97%	35,675	5,172
Sauvignon Blanc	2007	7,110	11,506	18,616	25,992	72%	18,912	-7,080
	2008	7,604	11,611	19,215	27,245	71%	20,629	-6,616
	2009	7,810	11,648	19,458	28,155	69%	23,155	-5,000
	2010	8,018	11,202	19,220	29,063	66%	24,833	-4,230
	2011	8,174	10,744	18,918	29,085	65%	24,971	-4,114
Semillon	2007	7,263	16,404	23,667	23,836	99%	25,763	1,927
	2008	7,366	14,768	22,133	24,309	91%	26,050	1,741
	2009	7,401	14,045	21,445	24,747	87%	26,186	1,439
	2010	7,417	13,838	21,254	25,232	84%	26,508	1,276
	2011	7,462	13,681	21,143	25,170	84%	26,838	1,668
All other white varieties	2007	10,600	75,390	85,991	89,278	96%	102,415	13,136
	2008	11,062	73,262	84,324	91,534	92%	104,884	13,350
	2009	13,292	69,817	83,109	97,504	85%	107,722	10,219
	2010	13,463	65,493	78,956	97,718	81%	109,902	12,185
	2011	13,855	61,926	75,781	95,208	80%	111,899	16,691
White winegrapes	2007	71,585	253,515	325,100	311,318	104%	352,663	27,563
	2008	73,900	245,433	319,332	325,107	98%	368,284	43,177
	2009	77,113	232,398	309,511	332,757	93%	378,730	45,973
	2010	77,689	215,240	292,929	336,770	87%	385,718	48,948
	2011	79,325	203,215	282,540	332,634	85%	391,107	58,473
All winegrapes	2007	214,493	632,618	847,111	748,968	113%	944,256	97,145
	2008	218,634	583,639	802,273	786,923	102%	968,911	166,639
	2009	223,810	541,929	765,739	821,603	93%	984,217	162,614
	2010	225,567	504,922	730,489	836,719	87%	998,101	161,382
	2011	228,735	475,539	704,273	836,175	84%	1,010,868	174,693

<sup>1</sup> Difference between supply and either committed intake or demand - whichever is higher