Phylloxera and Grape
Industry Board of South Australia

2004
South Australian Winegrape

UTILISATION & PRICING SURVEY

ACKNOWLEDGEMENTS

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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 2004. 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 Ayres, Peter Bird, Andrew Bryson, Alan Dean, Peter Freckleton, Ross Heinze, David Lloyd, Bruce Rowe, Alex Sass, Peter Stephens and Graeme Wellman.

The survey publication is available on the Board's website www.phylloxera.com.au. The entire report, or individual regions, can be downloaded as PDF files. The 2001, 2002 and 2003 reports are also available on the website, and hard copies of reports from previous years are available from the Board's office.

COVER IMAGE

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REPORT PREPARATION

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DISCLAIMER

INTERPRETATION OF REPORT INFORMATION

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

DOCUMENT STRUCTURE AND LAYOUT

The survey report has been structured in two parts. There is a state summary section at the front, followed by a separate section for each region, containing planting data, vintage statistics and projections. Regions are presented in alphabetical order.

Table of contents

Explanations and definitions

TONNAGE 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 relevant GI zone is used instead. Further disaggregation of data into smaller regions such as Currency Creek and Mount Benson is available on request from the Board's office (NB this does not include any crop value data for confidentiality reasons). The full list of regions for which information is available can be found in table 1.4 (page 10).

Total and preferred crush

The **total crushed** is the total tonnes of grapes crushed from a particular source region, whether processed in that region or not.

The **total preferred** is the tonnage that wineries would prefer to have received this vintage.

Percentage of demand supplied is the total tonnes crushed divided by the total preferred expressed as a percentage. A value of 100% means that supply and demand were equal. A value greater than 100% means that there was an oversupply, while a value less than 100% means that there was a shortfall.

Winery owned and independent grower owned vineyards

"Winery" refers to all wine companies, individuals etc who produce wine or juice for their own use or sale. Reported fruit is separated into fruit produced from the winery's own vineyards (own grown) and from independent grower owned vineyards (purchased). The proportion of purchased fruit is given as a percentage of the total.

CROP VALUE DATA

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.

Total purchase value

The total purchase value 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) paid 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** (formerly called the "weighted average weighbridge price") 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. *Note: in small varieties there may sometimes be only one winery contributing towards a calculated average purchase value per tonne.* The **estimated value of total grapes** is calculated by multiplying the average value per tonne by the total tonnes crushed.

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.*

Reliability of price reporting

Not all wineries report pricing data. The figure in brackets after the calculated average purchase value is the percentage of the total tonnes purchased for which pricing data was provided.

PROJECTIONS OF FUTURE INTAKE

Estimated and preferred

The estimated tonnage is the total tonnes that wineries expect to crush in each of the forecast years. This includes winery grown and purchased fruit.

The preferred tonnage is the tonnage required by wineries to achieve sales forecasts.

Where the preferred tonnage is higher than the estimated, a shortfall in supply is indicated. However, this does not necessarily mean a requirement for more planting. It may be that the shortfall can be met with fruit from another region, or uncontracted fruit not included in the estimated intake figures (provided it meets quality and price requirements).

Projected intake is not the same as production. The projections should be interpreted and used cautiously and should not be relied upon in making decisions about future production. It should be noted that there is considerable variation from one survey to the next in projections for the same future forecast year.

Reliability of forecasts

Not all wineries provide estimates of future intakes - particularly for the later forecast years. Therefore forecasts for later years tend to underreport actual demand. Since 2003 the convention has been adopted of “flat-lining” forecasts - ie continuing the same estimates of future supply and demand that are provided for earlier years, where later years have been left blank by reporting wineries.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2004 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 record current plantings, by year planted. Information is current as at April 2004 and includes all plantings up to the 2003 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, only the new variety appears in the database. This explains why the area planted for earlier years may be different in the 2004 report compared with previous reports.

2. Vineyard plantings are recorded in the database by Geographical Indication. In the State summary section, total plantings for all GI regions are given separately. However, in the regional reports section, planting details by variety are only given where regions meet the criteria for separate reporting (see previous page). Planting details for smaller regions 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.

4. Minor anomalies in the record-keeping system account for slight variations in the total area reported for the state in different tables.

GEOGRAPHICAL INDICATION (GI) REGIONS AND ZONES IN SA

State summary

OVERVIEW OF VINTAGE STATISTICS 2004

State and regional overview

The total crush of South Australian winegrapes in 2004 was a massive 920,194 tonnes. This was a 41% increase on last year's drought-affected harvest of 653,535 tonnes, and 30% more than the previous record harvest of 707,151 tonnes in 2002 *(table 1.1).* This was in spite of widespread crop thinning – particularly in red varieties.

There was increased production in all regions – the result of a combination of good growing conditions, excellent flowering and fruitset and some further increases in bearing area. The Adelaide Hills, Wrattonbully and Coonawarra all more than doubled their production – with Coonawarra increasing by nearly 200% to 62,651 tonnes. This was more than any region except the Riverland crushed in 2003. There were more moderate increases in the other regions, especially the Riverland (19% increase) and Langhorne Creek (10% increase). See figure 1.1.

Varietal overview

The red crush was 622,486 tonnes; the white crush was 297,708 tonnes. Red varieties accounted for 68% of the crush – the same as last year. Not surprisingly, there was an overall surplus of red varieties (23%). There were moderate surpluses in most of the major varieties: Grenache, Merlot, Pinot Noir and Shiraz, and a larger (33%) surplus in Cabernet Sauvignon. Once again there was a substantial (more than 100%) surplus in Ruby Cabernet. Shiraz accounted for 43% of the red crush, Cabernet Sauvignon for 33% and Merlot was a distant third at 9% *(figure 1.2).*

Despite the increased tonnages, the actual and preferred tonnages for white varieties were exactly in balance *(table 1.3)*. Chardonnay accounted for 46% of the white crush, with Colombard and Semillon next (10% each) – overtaking Muscat Gordo Blanco. Chardonnay increased its share again from 44% in 2003 and 41% in 2002 *(figure 1.3)*.

The total estimated purchase value of the crush at point of receival was $818 millon, up by nearly $200 million (29%) compared with 2003. This means that growers' income in generally was substantially increased, despite a drop in the average purchase value per tonne. This decreased again from $907 in 2003, and $940 in 2002, to $889 per tonne in 2004. The decrease this year is principally attributable to lower prices paid on average for fruit at point of receival. It is consistent with the very large vintage, and the change in market demand for fruit, driven by the export market to the US.

Source of fruit

Winery grown fruit accounted for 24% of the crush overall in 2004, compared with 23% in 2003, 21% in 2002, and 31% in 2001. There is considerable variation in this proportion between regions, with Padthaway having the largest percentage of winery owned fruit (62%) and the Adelaide Plains having the smallest (6%) *(table 1.4).* The percentage of winery grown fruit is projected to increase slightly to around 26% of the crush over the five year forecast period. (Forecasts by source of fruit are not presented in the report but are available on request from the Board's office.)

Projections of future intake

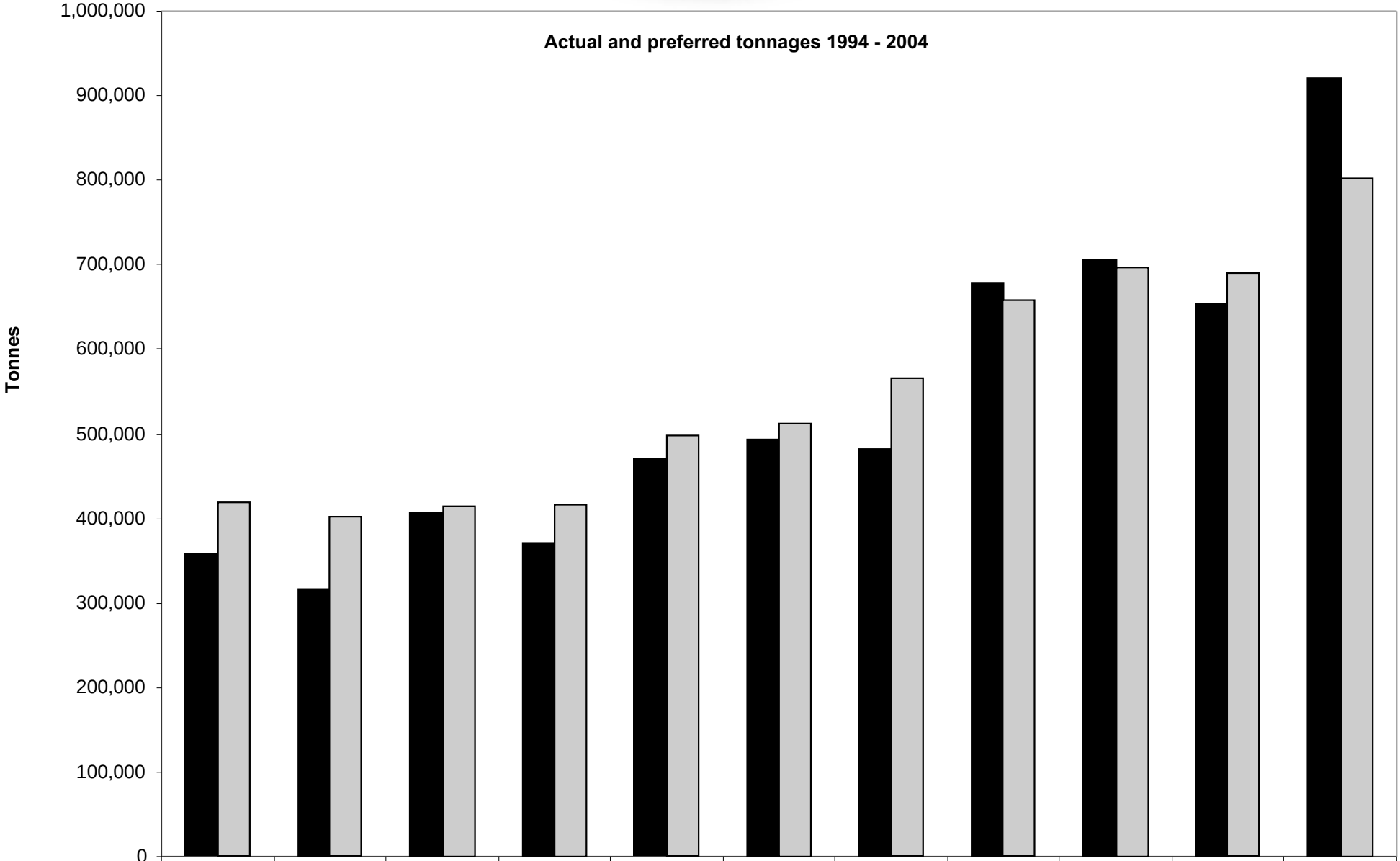
Projected intake for red varieties over the five year forecast period is expected to stabilise at around 600,000 tonnes, with estimated being greater than preferred intake in each year. The oversupply decreases from 85,000 tonnes (14%) in 2005 to 30,000 tonnes (5%) by 2009 *(table 1.6)*. This means that, overall, wineries have commitments to take in more red varieties than they would prefer to take, based on current estimates of their future market requirements. Intake of white varieties is forecast to grow to a maximum of 354,000 tonnes in 2007 and then decline slightly to 346,000 tonnes in 2009, at which time estimated and preferred intake are in balance.

It should be noted that "estimated intake" is not the same as production. See table 1.9 for an estimate of the future production for each region, compared with wineries' proposed future intake. It should also be noted that the forecast intake figures reflect wineries' current thinking on market requirements, and can change substantially from year to year depending on market activity and other factors. They should not be interpreted as an accurate indication of intake tonnages in five years' time.

Vineyard plantings

Planting data derived from the Phylloxera and Grape Industry Board's vineyard register shows that there were 69,827 hectares planted to vines in South Australia at 30 April 2004. Of these, 1909 hectares (3%) were planted in 2003 *(table 1.7)*. New planting of red varieties declined further (809 hectares planted, compared with 1330 hectares in 2002), while new planting of white varieties also declined (1097 compared with 1400 hectares in the previous year). Once again, new plantings of white varieties exceeded red varieties *(figure 1.5).*

Using an estimated yield figure for red and white varieties in each region, the production for 2009 has been calculated for the major South Australian regions *(table 1.9)*. This has been compared with the preferred intake figures given in the survey. The comparison suggests an overall shortfall of 44,000 tonnes between preferred intake and production (if the yield estimates are correct). The shortfall is almost entirely in the Riverland, with small shortages in Langhorne Creek, McLaren Vale and Padthaway (white varieties only). Conversely, there are significant surpluses of fruit forecast in th e other regions - particularly the Barossa and Clare Valleys (red varieties). However, these figures should be treated with caution, as they are subject to signficant fluctuation depending on the forecast figures (which vary from survey to survey) and on the estimates of future yield.

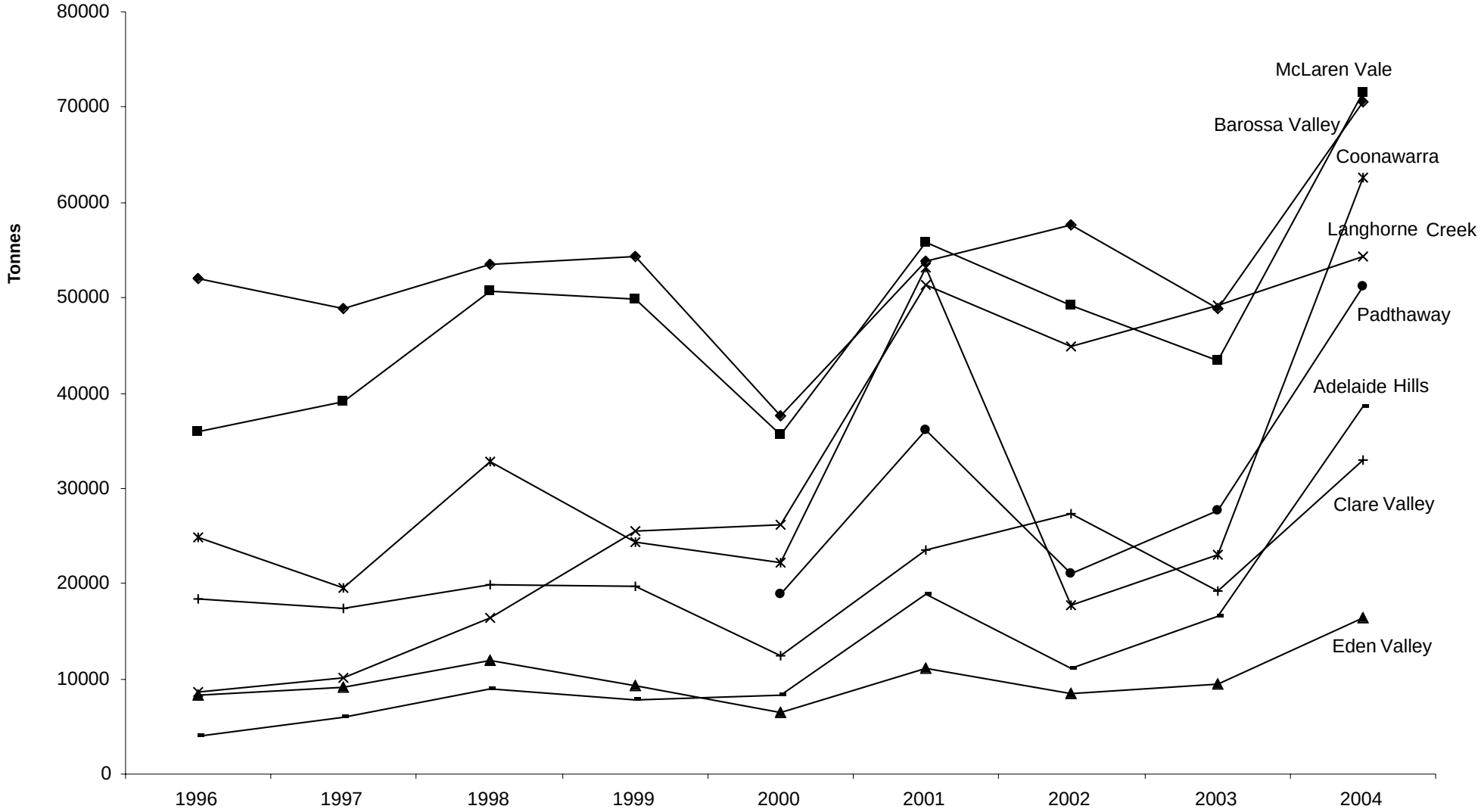


	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
■ Actual usage	357217	315482	406387	371533	471313	494205	482157	678821	707151	653535	920194
□ Preferred usage	418983	401665	414101	416162	497349	511863	565750	657414	696920	689556	802236

HISTORICAL TRENDS IN PRODUCTION 1996 TO 2004 BY REGION *

Figure 1.1

Vintage by region 1996 - 2004 major regions
Not including the Riverland



* Note: The Riverland is not included on this chart because it does not fit on the same scale. See page 97 for Riverland chart.

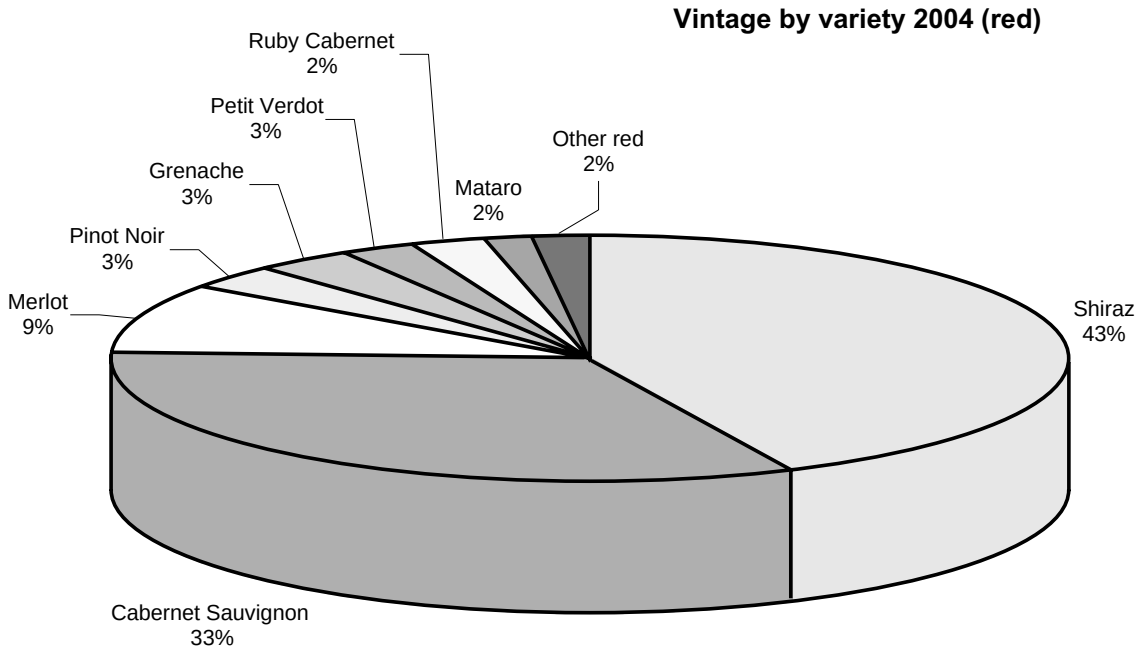
VINTAGE 2004 BY VARIETY - RED

Table 1.2

Variety	***Tonnes crushed***	***Tonnes preferred***	***Diff****	***% of demand supplied***
Red				
Barbera	102	119	-17	85%
Cabernet Franc	2,952	1,519	1,433	194%
Cabernet Sauvignon	202,851	152,042	50,808	133%
Chambourcin	108	30	78	361%
Durif	43	32	11	136%
Grenache	20,613	17,861	2,752	115%
Malbec	2,514	2,191	323	115%
Mataro	9,978	5,541	4,437	180%
Merlot	55,201	48,383	6,818	114%
Muscat Brown	25	30	-5	85%
Nebbiolo	204	161	43	127%
Petit Verdot	16,190	12,570	3,620	129%
Pinot Noir	21,177	19,483	1,695	109%
Rubired	161	238	-77	68%
Ruby Cabernet	15,116	6,885	8,230	220%
Sangiovese	2,225	1,575	650	141%
Shiraz	268,602	232,622	35,979	115%
Tarrango	1,573	1,487	86	106%
Tempranillo	554	521	33	106%
Zinfandel	179	186	-7	96%
Other red	2,117	1,761	356	117%
Total red	**622,486**	**505,239**	**117,247**	**123%**

** A negative difference indicates a shortfall; a positive difference indicates a surplus*

Figure 1.2



VINTAGE 2004 BY VARIETY - WHITE

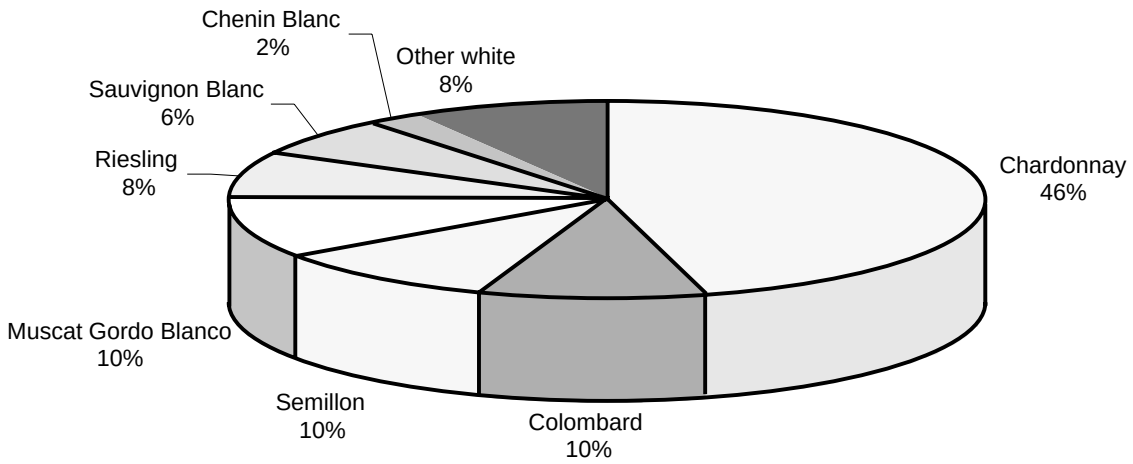
Table 1.3

Variety	*Tonnes crushed*	*Tonnes preferred*	*Diff**	*% of demand supplied*
WHITE				
Chardonnay	136,293	137,014	-720	99%
Chenin Blanc	6,746	6,107	639	110%
Colombard	29,396	30,041	-645	98%
Marsanne	211	202	9	104%
Merbein Seedless	110	110	0	100%
Muscadelle	521	479	42	109%
Muscat Blanc	1,085	1,180	-95	92%
Muscat Gordo Blanco	28,508	29,040	-532	98%
Pinot Gris	900	942	-42	96%
Riesling	24,465	24,028	437	102%
Rousanne	51	106	-55	48%
Sauvignon Blanc	18,155	17,738	417	102%
Semillon	29,072	28,781	291	101%
Sultana	5,839	6,461	-621	90%
Taminga	159	95	64	167%
Traminer	2,727	2,687	40	101%
Trebbiano	262	116	146	225%
Verdelho	4,148	4,092	56	101%
Viognier	2,376	2,557	-181	93%
Other white (1)	6,683	5,220	1,464	128%
Total white	**297,708**	**296,997**	**712**	**100%**
Total all varieties	**920,195**	**802,236**	**117,959**	**115%**

(1) Includes neutral whites Crouchen, Pedro Ximenes, Palamino and Doradillo
** A negative difference indicates a shortfall; a positive difference indicates a surplus*

Figure 1.3

Vintage by variety 2004 (white)



VINTAGE 2004 BY GI REGION

Table 1.4

Region	Winery grown (tonnes)	Independent grower (tonnes)	Total tonnes crushed	% winery grown
ADELAIDE HILLS	3959	34685	38645	10%
ADELAIDE PLAINS	413	6589	7003	6%
BAROSSA VALLEY	13151	57057	70208	19%
BAROSSA ZONE - OTHER	330	35	365	90%
BORDERTOWN	4922	12537	17459	28%
CLARE VALLEY	13518	19505	33023	41%
COONAWARRA	32730	29920	62651	52%
CURRENCY CREEK	3057	3267	6324	48%
EDEN VALLEY	7870	8449	16319	48%
FLEURIEU ZONE - OTHER	170	2881	3050	6%
KANGAROO ISLAND	44	77	121	36%
LANGHORNE CREEK	18292	36068	54360	34%
LIMESTONE COAST ZONE - OTHER	3841	5849	9690	40%
LOWER MURRAY ZONE - OTHER	272	2262	2534	11%
MCLAREN VALE	19612	51903	71515	27%
MOUNT BENSON	967	2067	3035	32%
MOUNT LOFTY RANGES ZONE - OTHER	159	1576	1735	9%
PADTHAWAY	31788	19342	51130	62%
RIVERLAND	54629	385492	440121	12%
SOUTHERN FLEURIEU	91	841	932	10%
SOUTHERN FLINDERS RANGES	126	1126	1252	10%
THE PENINSULAS	59	215	274	21%
WRATTONBULLY	13609	14841	28451	48%
Total	**223611**	**696583**	**920195**	**24%**

VINTAGE STATISTICS 2004 - SUMMARY BY REGION

Table 1.5

	total winery grown	total purchased	total crushed	estimated value of purchased grapes	estimated value of total crush	average reliability of estimated value
Adelaide Hills						
Red	**1042**	**17788**	**18830**	**$23,774,770**	**$25,176,543**	**94%**
White	**2917**	**16897**	**19815**	**$26,571,577**	**$31,202,746**	**100%**
Total	**3959**	**34685**	**38645**	**$50,346,347**	**$56,379,289**	**N/A**
Adelaide Plains						
Red	**283**	**4412**	**4696**	**$3,584,966**	**$3,821,588**	**100%**
White	**130**	**2177**	**2307**	**$2,140,740**	**$2,255,105**	**100%**
Total	**413**	**6589**	**7003**	**$5,725,706**	**$6,076,694**	**N/A**
Barossa Valley						
Red	**10033**	**39905**	**49939**	**$53,488,801**	**$66,756,015**	**93%**
White	**3449**	**17186**	**20635**	**$16,111,671**	**$19,495,360**	**100%**
Total	**13482**	**57092**	**70573**	**$69,600,472**	**$86,251,375**	**N/A**
Clare Valley						
Red	**8121**	**14265**	**22385**	**$19,809,038**	**$30,684,736**	**100%**
White	**5398**	**5240**	**10638**	**$7,292,871**	**$14,670,925**	**100%**
Total	**13518**	**19505**	**33023**	**$27,101,909**	**$45,355,661**	**N/A**
Coonawarra						
Red	**27610**	**26888**	**54498**	**$28,924,407**	**$57,943,237**	**100%**
White	**5120**	**3033**	**8153**	**$4,171,447**	**$10,789,882**	**99%**
Total	**32730**	**29920**	**62651**	**$33,095,854**	**$68,733,119**	**N/A**

VINTAGE STATISTICS 2004 - SUMMARY BY REGION (CONT.D)

Table 1.5 cont.d

	total winery grown	total purchased	total crushed	estimated value of purchased grapes	estimated value of total crush	average reliability of estimated value
Eden Valley						
Red	**3380**	**4760**	**8140**	**$6,156,892**	**$10,072,793**	**100%**
White	**4490**	**3689**	**8179**	**$5,359,076**	**$12,113,646**	**100%**
Total	**7870**	**8449**	**16319**	**$11,515,968**	**$22,186,439**	**N/A**
Fleurieu zone - other						
Red	**2900**	**6134**	**9034**	**$7,323,126**	**$10,636,241**	**100%**
White	**461**	**931**	**1392**	**$1,125,351**	**$1,687,647**	**100%**
Total	**3361**	**7065**	**10426**	**$8,448,477**	**$12,323,887**	**N/A**
Langhorne Creek						
Red	**14755**	**32505**	**47260**	**$37,969,409**	**$54,885,736**	**100%**
White	**3537**	**3563**	**7100**	**$4,502,212**	**$8,588,415**	**100%**
Total	**18292**	**36068**	**54360**	**$42,471,621**	**$63,474,151**	**N/A**
Limestone Coast zone - other						
Red	**6919**	**17814**	**24734**	**$15,823,594**	**$22,117,518**	**100%**
White	**2811**	**2639**	**5450**	**$3,033,447**	**$6,265,233**	**100%**
Total	**9730**	**20453**	**30183**	**$18,857,041**	**$28,382,751**	**N/A**
McLaren Vale						
Red	**15724**	**41848**	**57571**	**$58,540,838**	**$80,349,856**	**99%**
White	**3888**	**10055**	**13943**	**$12,545,318**	**$17,415,062**	**100%**
Total	**19612**	**51903**	**71515**	**$71,086,156**	**$97,764,919**	**N/A**

Table 1.5 cont.d

	total winery grown	total purchased	total crushed	estimated value of purchased grapes	estimated value of total crush	average reliability of estimated value
Padthaway						
Red	**16495**	**13824**	**30319**	**$13,609,938**	**$29,333,523**	**100%**
White	**15293**	**5518**	**20812**	**$7,147,816**	**$25,380,901**	**100%**
Total	**31788**	**19342**	**51130**	**$20,757,754**	**$54,714,424**	**N/A**
Riverland						
Red	**28122**	**236409**	**264531**	**$115,417,659**	**$128,905,773**	**96%**
White	**26507**	**149083**	**175589**	**$89,386,150**	**$105,069,021**	**96%**
Total	**54629**	**385492**	**440121**	**$204,803,809**	**$233,974,794**	**N/A**
Wrattonbully						
Red	**11978**	**13830**	**25809**	**$18,033,858**	**$33,185,430**	**100%**
White	**1631**	**1011**	**2642**	**$1,477,017**	**$3,565,161**	**100%**
Total	**13609**	**14841**	**28451**	**$19,510,875**	**$36,750,590**	**N/A**
SA - other						
Red	**446**	**4296**	**4741**	**$4,611,943**	**$5,096,565**	**100%**
White	**170**	**883**	**1054**	**$473,786**	**$543,977**	**100%**
Total	**616**	**5179**	**5795**	**$5,085,729**	**$5,640,542**	**N/A**
Grand Total	**223611**	**696583**	**920194**	**$588,407,718**	**$818,008,636**	**N/A**

FORECAST INTAKE (ESTIMATED AND PREFERRED) 2005 - 2009 BY VARIETY (RED)

Table 1.6

	2005		2006		2007		2008		2009	
VARIETY	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*
Barbera	184	150	202	162	180	167	190	177	193	181
Cabernet Franc	2170	1293	2080	1228	2073	1246	1850	1136	1918	1159
Cabernet Sauvignon	193195	153922	189811	153791	191688	162054	183753	158407	180198	157902
Chambourcin	95	30	95	30	95	30	95	30	95	30
Durif	52	48	126	118	126	118	127	121	127	123
Grenache	21419	19077	21494	19756	21733	20233	21938	20642	21890	21090
Malbec	2598	1954	2584	1926	2566	1884	2381	1855	2381	1875
Mataro	9095	5222	9095	5422	8944	5287	8665	5088	8144	4725
Merlot	57251	51618	60953	54858	61049	56003	64016	59407	63123	59251
Muscat Brown	41	42	37	37	37	37	37	37	37	37
Nebbiolo	268	204	269	204	264	206	249	187	253	192
Other red	1862	1545	1899	1577	1888	1562	1654	1326	1678	1295
Petit Verdot	16368	13339	16403	13283	15746	12627	14304	11382	13866	10607
Pinot Noir	16592	16110	20925	20501	20771	20501	19822	19591	19458	19229
Rubired	338	245	348	255	343	250	353	260	383	290
Ruby Cabernet	13682	7722	13322	7424	12310	6424	11701	6088	11158	5495
Sangiovese	1944	1315	2006	1354	1984	1353	1544	1271	1555	1287
Shiraz	259486	239178	261879	246784	264284	254164	261007	261427	254981	264766
Tarrango	1101	1070	1101	1070	201	170	201	170	201	170
Tempranillo	1132	1070	1284	1215	1333	1267	1050	1056	1062	1103
Zinfandel	160	139	147	154	160	154	160	154	160	154
Total for red	**599031**	**515292**	**606060**	**531148**	**607773**	**545736**	**595096**	**549810**	**582860**	**550961**

FORECAST INTAKE (ESTIMATED AND PREFERRED) 2005 - 2009 BY VARIETY (WHITE)

Table 1.6 cont.d

	2005		2006		2007		2008		2009	
VARIETY	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*
Chardonnay	166245	168378	184491	185745	190478	191684	191354	197105	189172	194995
Chenin Blanc	5819	5210	7440	6741	7275	6621	7959	7255	7782	7078
Colombard	37022	37490	37026	37393	34152	34567	33942	34677	33334	33799
Marsanne	203	200	226	223	231	228	231	228	231	228
Merbein Seedless	0	0	0	0	0	0	0	0	0	0
Muscadelle	584	524	564	521	487	444	410	367	410	367
Muscat Blanc	1262	1338	1435	1497	1468	1524	1397	1452	1397	1452
Muscat Gordo Blanco	25485	26129	25651	26195	22589	24153	21291	13035	19735	11745
Other white	6783	5448	6400	5395	6162	5162	6040	4968	5948	4894
Pinot Gris	923	1020	1141	1341	1337	1529	1431	1675	1428	1772
Riesling	25098	25603	26935	27292	28569	28746	27559	27628	27770	27890
Rousanne	80	110	118	118	118	118	118	118	118	118
Sauvignon Blanc	17299	18534	18684	20111	19316	21163	19194	21017	19514	21431
Semillon	25973	26156	25055	25246	24502	24665	22536	22692	22399	22680
Sultana	4899	5499	4824	5324	4398	4898	4228	4728	3430	3930
Taminga	136	60	136	60	136	60	136	60	126	50
Traminer	3819	3337	4823	4849	5000	5030	4859	4726	4764	4631
Trebbiano	220	151	211	150	211	150	211	150	211	150
Verdelho	5186	5168	4832	4854	4801	4772	4583	4599	4566	4587
Viognier	2701	3379	3312	4205	3555	4935	3443	5260	3483	5511
Total for white	**329736**	**333731**	**353304**	**357258**	**354784**	**360447**	**350920**	**351738**	**345816**	**347307**
Total for all varieties	**928767**	**849023**	**959363**	**888406**	**962557**	**906183**	**946016**	**901548**	**928676**	**898268**

CURRENT PLANTINGS* IN SA BY VARIETY (RED)

Table 1.7

	Area in hectares by year planted*							
Variety	*Pre-99*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total*	*% planted in 2003*
RED WINEGRAPES								
BARBERA	4	7	4	4	1	0	19	0%
CABERNET FRANC	208	27	5	14	1	0	255	0%
CABERNET SAUVIGNON	13033	1919	859	734	244	110	16899	1%
GRENACHE	1510	159	98	46	31	17	1860	1%
MALBEC	215	58	21	9	3	1	307	0%
MATARO (MOUVEDRE)	472	80	57	44	12	6	670	1%
MERLOT	2925	543	272	331	188	67	4326	2%
NEBBIOLO	10	24	15	2	0	0	52	0%
PETIT VERDOT	372	279	157	114	15	5	943	1%
PINOT NOIR	946	147	152	72	44	9	1371	1%
RUBY CABERNET	475	182	38	6	5	0	706	0%
SANGIOVESE	107	60	49	8	4	1	229	0%
SHIRAZ	15010	2330	1186	1371	1000	582	21479	3%
TEMPRANILLO	7	20	11	45	39	5	127	4%
OTHER RED	169	20	43	16	12	6	267	2%
TOTAL RED WINEGRAPES	**35462**	**5856**	**2967**	**2817**	**1599**	**809**	**49510**	**2%**

** Planting data tables record current plantings, by year planted. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground.*

CURRENT PLANTINGS IN SA BY VARIETY (WHITE)

Table 1.7 cont.d

Area in hectares by year planted

Variety	*Pre-99*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total*	*% planted in 2003*
WHITE WINEGRAPES								
CHARDONNAY	6125	122	236	1065	1199	671	9418	7%
CHENIN BLANC	258	1	0	0	4	0	262	0%
COLOMBARD	515	121	114	90	43	21	903	2%
DORADILLO	163	0	0	1	0	0	164	0%
MARSANNE	15	5	0	1	2	1	25	5%
MUSCADELLE	59	0	0	1	0	0	60	0%
MUSCAT BLANC	118	0	1	3	9	4	134	3%
MUSCAT GORDO BLANCO	1048	3	5	21	26	20	1123	2%
PALOMINO	71	0	0	0	0	0	71	0%
PEDRO XIMENEZ	50	0	0	0	1	0	51	0%
PINOT GRIS	21	18	23	10	7	42	121	35%
RIESLING	2093	118	119	233	258	154	2974	5%
ROUSSANNE	8	0	0	2	0	0	11	3%
SAUVIGNON BLANC	882	48	92	133	88	108	1351	8%
SEMILLON	1648	33	29	11	5	5	1730	0%
SULTANA	489	8	3	9	5	21	536	4%
TRAMINER	141	1	6	56	35	21	259	8%
TREBBIANO	40	0	0	0	0	0	40	0%
VERDELHO	232	20	22	10	1	2	286	1%
VIOGNIER	71	51	76	88	33	26	346	8%
OTHER WHITE	140	2	1	5	5	1	155	1%
TOTAL WHITE WINEGRAPES	**14187**	**552**	**727**	**1740**	**1719**	**1097**	**20022**	**5%**
ROOTSTOCK BLOCK	35	22	0	1	0	1	59	1%
ALL OTHER VARIETIES	219	6	1	2	6	3	237	1%
TOTAL ALL VARIETIES	**49903**	**6436**	**3695**	**4559**	**3325**	**1909**	**69827**	**3%**

CURRENT PLANTINGS IN SA BY GI REGION AND YEAR PLANTED

Table 1.8	*Pre-99*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total*	*% planted in 2003*	*% state plantings*
MOUNT LOFTY ZONE									
Adelaide Hills	1982	292	386	361	185	132	3338	4.0%	4.8%
Clare Valley	3670	522	323	153	186	143	4995	2.9%	7.2%
Adelaide Plains	393	10	52	74	3	40	572	7.0%	0.8%
Mount Lofty Zone other	120	79	21	36	7	13	276	4.6%	0.4%
Total for Mount Lofty Zone	**6165**	**904**	**782**	**625**	**380**	**328**	**9181**	**3.6%**	**13.2%**
BAROSSA ZONE									
Eden Valley	1610	215	35	122	94	23	2099	1.1%	3.0%
Barossa Valley	6050	624	613	720	674	250	8931	2.8%	12.9%
Barossa Zone - other	70	15	0	14	0	0	99	0.0%	0.1%
Total for Barossa Zone	**7730**	**854**	**648**	**856**	**768**	**273**	**11129**	**2.5%**	**16.0%**
FLEURIEU ZONE									
McLaren Vale	4936	793	291	351	190	94	6654	1.4%	9.6%
Langhorne Creek	3960	620	202	416	369	209	5776	3.6%	8.3%
Kangaroo Island	40	18	12	24	4	5	104	4.4%	0.1%
Southern Fleurieu	236	30	25	29	3	6	330	2.0%	0.5%
Currency Creek	269	77	137	101	45	26	656	4.0%	0.9%
Fleurieu Zone - other	57	29	0	0	28	17	131	13.2%	0.2%
Total for Fleurieu Zone	**9499**	**1567**	**667**	**921**	**640**	**357**	**13651**	**2.6%**	**19.6%**
LOWER MURRAY ZONE									
Riverland	15760	1488	820	1221	927	653	20869	3.1%	30.0%
Lower Murray Zone - other	255	56	41	19	36	10	417	2.4%	0.6%
Total for Lower Murray Zone	**16015**	**1544**	**861**	**1240**	**963**	**663**	**21286**	**3.1%**	**30.6%**
LIMESTONE COAST ZONE									
Coonawarra	4352	500	204	167	169	86	5477	1.6%	7.9%
Padthaway	2849	193	177	170	151	51	3590	1.4%	5.2%
Wrattonbully	1293	214	115	277	108	89	2094	4.2%	3.0%
Mount Benson	208	68	54	80	45	8	463	1.7%	0.7%
Bordertown	520	506	107	81	36	2	1252	0.1%	1.8%
Limestone Coast Zone - other	1034	19	43	42	28	0	1166	0.0%	1.7%
Total for Limestone Coast Zone	**10255**	**1500**	**700**	**817**	**536**	**235**	**14042**	**1.7%**	**20.2%**
OTHER ZONES									
Far North Zone	**107**	**17**	**18**	**17**	**17**	**0**	**178**	0.0%	0.3%
The Peninsulas Zone	25	0	0	4	2	0	31	0.0%	0.0%
Total for All GIs	**49796**	**6386**	**3676**	**4480**	**3306**	**1857**	**69499**	**2.7%**	**100.0%**

NUMBER OF GROWERS AND CURRENT PLANTINGS IN SA BY SIZE OF PROPERTY

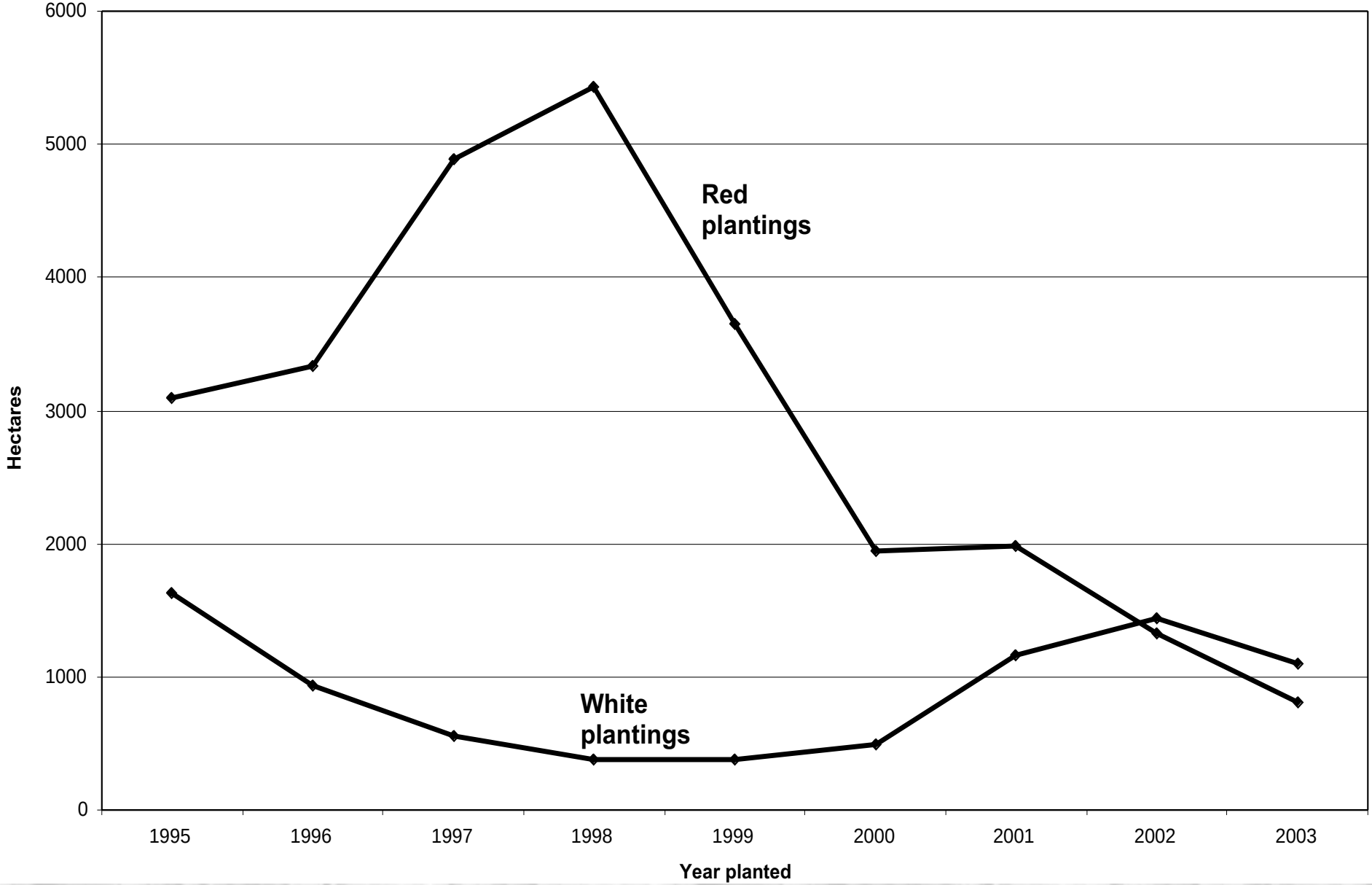
Figure 1.4

Property size in hectares

GI region	<10 Number growers	<10 Area (ha)	10 - 24 Number growers	10 - 24 Area (ha)	25 - 49 Number growers	25 - 49 Area (ha)	50 + Number growers	50 + Area (ha)	Total growers	Total area (ha)
Mount Lofty Zone										
Adelaide Hills	171	660	53	903	28	926	11	832	**263**	**3322**
Adelaide Plains	20	92	6	92	3	114	3	267	**32**	**565**
Clare Valley	126	544	51	804	19	616	21	2902	**217**	**4866**
Mount Lofty Zone - other	17	47	4	59	3	102	1	93	**25**	**301**
Barossa Zone										
Barossa Valley (inc Zone - other)	244	1126	148	2409	70	2349	24	3234	**486**	**9117**
Eden Valley	63	293	22	332	10	333	10	1157	**105**	**2114**
Limestone Coast Zone										
Bordertown	0	0	0	0	1	43	5	1208	**6**	**1252**
Coonawarra	36	193	34	492	17	597	22	4209	**109**	**5491**
Mount Benson	4	23	5	90	4	139	3	211	**16**	**463**
Padthaway	3	17	4	57	4	149	15	3377	**26**	**3600**
Wrattonbully	8	43	18	312	10	345	9	1376	**45**	**2076**
Limestone Coast Zone - other	20	93	12	198	3	108	6	775	**41**	**1175**
Fleurieu Zone										
Currency Creek	4	19	6	84	3	105	2	444	**15**	**651**
Kangaroo Island	14	82	2	22	0	0	0	0	**16**	**104**
Langhorne Creek	16	91	26	447	25	909	28	4339	**95**	**5786**
McLaren Vale	300	1328	88	1418	47	1538	23	2405	**458**	**6689**
Southern Fleurieu	22	67	5	62	2	61	1	68	**30**	**258**
Fleurieu Zone - other	9	27	3	52	4	129	0	0	**16**	**208**
Lower Murray Zone										
Riverland	797	4002	367	5507	88	3030	51	8480	**1303**	**21018**
Lower Murray Zone - other	15	65	7	126	7	230	0	0	**29**	**420**
Other zones										
Far North Zone	11	51	5	84	1	43	0	0	**17**	**178**
The Peninsulas Zone	5	21	1	10	0	0	0	0	**6**	**31**
Grand Total	**1905**	**8882**	**867**	**13560**	**349**	**11866**	**235**	**35376**	**3356**	**69684**
% of total	57%	13%	26%	19%	10%	17%	7%	51%	**100%**	**100%**

NEW PLANTINGS IN SOUTH AUSTRALIA SINCE 1995

Figure 1.5



ESTIMATED PRODUCTION COMPARED WITH FORECAST DEMAND IN 2009

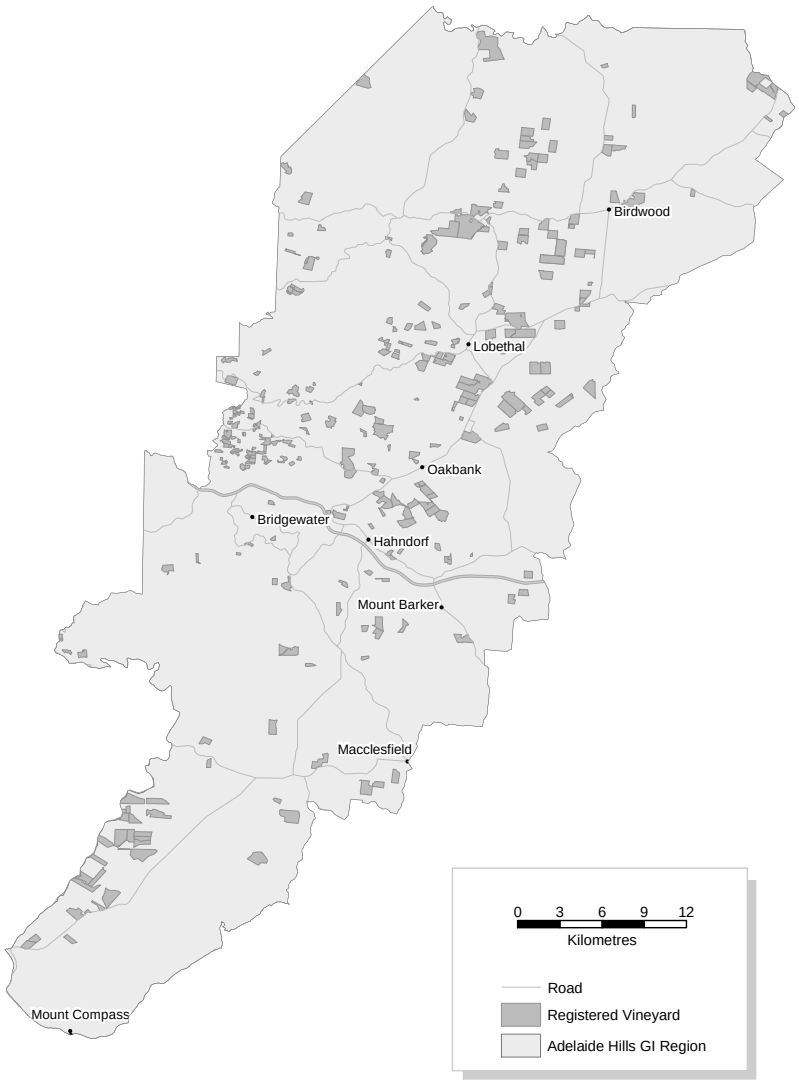
Table 1.9

Region	Colour	Current vineyard area (ha)	Yield (1)	Estimated production 2009 (t)	Forecast demand 2009 (t)	Diff* (2)	Area required (ha)
ADELAIDE HILLS	RED	1596	9	14364	9434	4930	
	WHITE	1740	10	17400	16402	998	
BAROSSA VALLEY	RED	7036	10	70360	51090	19270	
	WHITE	2078	11	22858	20058	2800	
CLARE VALLEY	RED	3439	10	34390	20490	13900	
	WHITE	1557	11	17127	12085	5042	
COONAWARRA	RED	4791	9	43119	35969	7150	
	WHITE	687	10	6870	5224	1646	
EDEN VALLEY	RED	1153	10	11530	5442	6088	
	WHITE	946	11	10406	8381	2025	
LANGHORNE CREEK	RED	4860	12	58320	56603	1717	
	WHITE	916	13	11908	15817	**-3909**	**301**
MCLAREN VALE	RED	5508	10	55080	50488	4592	
	WHITE	1142	11	12562	15306	**-2744**	**249**
PADTHAWAY	RED	2152	10	21520	18854	2666	
	WHITE	1438	11	15818	17196	**-1378**	**125**
RIVERLAND	RED	12452	17	211684	263173	**-51489**	**3029**
	WHITE	8151	20	163020	223199	**-60179**	**3009**
WRATTONBULLY	RED	1883	11	20713	18582	2131	
	WHITE	211	12	2532	1671	861	
Total (for these regions)	**RED**			**541080**	**530125**	**10955**	**3029**
	WHITE			**280501**	**335339**	**-54838**	**3864**

(1) Based on current industry estimates. *(2) A negative number indicates a shortfall; a positive number indicates a surplus*

This table compares estimated future production (based on plantings already in the ground) with future demand, taken from the 2009 forecast intake figures. It shows that the Riverland is the only region where there is a significant shortfall in both red and white grapes in 2009. While initial analysis may indicate a need for increased plantings in the Riverland, some or much of this demand may be met by grapes purchased from other regions in surplus supply. However, there is not enough surplus of white varieties to meet the estimated shortfall without additional plantings (by 2005 or 2006).

ADELAIDE HILLS VINTAGE OVERVIEW



Vintage report

Adelaide Hills Wine Region experienced a good growing season with generally higher yields and a late and long vintage.

High bud fruitfulness from spring 2002 resulted in higher than average yield potential. This was realised by near perfect weather conditions during flowering in all varieties. Sauvignon Blanc and Merlot in particular set beautiful crops. This was a welcome change from the two previous lower-cropping vintages in most varieties.

The growing season was characterised by ample winter rain and a very cool start in October. Summer was generally mild, warm and dry with an uncharacteristically cool January. The February heat wave had limited impact on well-watered and balanced canopies and the region was generally far less affected than other grape growing regions.

Crop estimates had to be revised upward late in the season as bunch weights steadily increased after veraison. Bunch thinning was common to bring the canopy and crop more into balance.

With larger crops hanging on the vine, the long dry autumn was a blessing and resulted in very low disease pressure.

Tom Ayers, Adelaide Hills Wine Region

Overview of vintage statistics

The Adelaide Hills produced 38,645 tonnes in 2004 – more than double the 2003 vintage. There was a moderate surplus reported of reds (18%) and less in whites (9%).

The average purchase value per tonne for Cabernet Sauvignon, Merlot and Pinot Noir fell significantly (up to $500 per tonne), and Chardonnay fell by $250 per tonne. However, the total income to the region increased substantially, with the income to growers almost double, and the total value of grapes from the region up from $27.5 million to $56 million.

The forecast intake for the region declines from around 30,000 tonnes (20% less than the 2004 production) in 2006 to 25,000 in 2009. Sauvignon Blanc is expected to overtake Pinot Noir as the second most important variety for the region, and is the only major variety not showing a decline in intake between 2005 and 2009.

There were 126 hectares of white varieties (Chardonnay, Pinot Gris and Sauvignon Blanc) planted in 2003, and only 7 hectares of red varieties. This is in line with the change in demand back towards white varieties.

Based on the current vineyard area in the region, and using estimated yield figures of nine tonnes per hectare (t/ha) for reds and 10 t/ha for whites, the estimated production for the region in 2009 is around 32,000 tonnes. This is nearly 6,000 tonnes higher than the preferred intake from the region for that year. Most of the estimated surplus is in red varieties. While demand forecasts change from year to year, this discrepancy between potential production and intake may foreshadow some problems for growers without contracts.

ADELAIDE HILLS CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 2.1

	Current area in hectares by year planted							
Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
BARBERA	0	0	0	0	1	0	1	0%
CABERNET FRANC	10	1	2	0	0	0	13	0%
CABERNET SAUVIGNON	272	20	23	16	3	1	334	0%
GRENACHE	2	2	0	0	0	0	3	0%
MALBEC	1	1	2	0	0	0	4	0%
MATARO (MOUVEDRE)	0	0	0	1	0	0	1	0%
MERLOT	235	45	42	15	0	1	338	0%
NEBBIOLO	3	0	2	1	0	0	6	0%
PETIT VERDOT	0	2	0	1	1	1	5	17%
PINOT NOIR	345	82	49	38	16	1	532	0%
RUBY CABERNET	0	0	0	0	0	0	0	0%
SANGIOVESE	5	1	4	0	0	0	10	1%
SHIRAZ	199	39	37	21	2	2	301	1%
TEMPRANILLO	2	2	5	5	0	0	13	0%
OTHER RED	33	0	0	0	1	0	35	1%
TOTAL RED WINEGRAPES	**1107**	**194**	**166**	**98**	**24**	**7**	**1596**	**0%**
WHITE WINEGRAPES								
CHARDONNAY	431	35	83	131	77	57	815	7%
CHENIN BLANC	0	0	0	0	0	0	0	0%
PINOT GRIS	15	11	18	2	0	40	85	47%
RIESLING	24	5	17	27	32	0	106	0%
SAUVIGNON BLANC	277	28	72	84	34	26	520	5%
SEMILLON	80	7	8	1	0	0	97	0%
TRAMINER	1	0	0	5	15	0	21	0%
VERDELHO	25	3	0	0	0	0	28	0%
VIOGNIER	19	9	20	12	3	2	65	3%
OTHER WHITE	2	0	1	0	0	0	3	0%
TOTAL WHITE WINEGRAPES	**875**	**97**	**219**	**262**	**161**	**126**	**1740**	**7%**
ROOTSTOCK BLOCK	1	1	0	1	0	0	3	0%
TOTAL ALL VARIETIES	**1982**	**292**	**386**	**361**	**185**	**132**	**3338**	**4%**

ADELAIDE HILLS TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 2.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Barbera	**0**	**1**	**1**	**5**	100%	21%	0	1	1
Cabernet Franc	**24**	**94**	**119**	**62**	80%	191%	3	5	6
Cabernet Sauvignon	**231**	**3137**	**3369**	**2304**	93%	146%	7	19	21
Gamay	**0**	**9**	**9**	**9**	100%	100%	0	1	1
Grenache	**0**	**74**	**74**	**75**	100%	98%	0	2	2
Malbec	**9**	**12**	**21**	**5**	58%	426%	1	1	1
Mataro (Mouvedre)	**0**	**25**	**25**	**20**	100%	126%	0	2	2
Merlot	**126**	**3757**	**3884**	**3152**	97%	123%	8	16	21
Meunier	**5**	**562**	**568**	**568**	99%	100%	1	4	4
Nebbiolo	**0**	**12**	**12**	**13**	100%	92%	0	2	2
Petit Verdot	**0**	**35**	**35**	**5**	100%	705%	0	3	1
Pinot Noir	**382**	**7079**	**7461**	**7279**	95%	103%	11	21	26
Sangiovese	**0**	**125**	**125**	**94**	100%	133%	0	6	5
Shiraz	**219**	**2796**	**3015**	**2337**	93%	129%	5	21	24
Tempranillo	**26**	**55**	**81**	**68**	68%	119%	1	5	3
Unsound / distillation red	**0**	**13**	**13**	**0**	100%		0	1	0
Zinfandel	**19**	**0**	**19**	**20**	0%	93%	1	0	1
Total RED	**1042**	**17788**	**18830**	**16017**	94%	118%			
WHITE									
Chardonnay	**1202**	**8201**	**9403**	**8628**	87%	109%	12	30	37
Marsanne	**0**	**3**	**3**	**0**	100%		0	1	0
Other white (group together)	**0**	**51**	**51**	**5**	100%	1015%	0	3	1
Pinot Gris	**17**	**678**	**695**	**690**	98%	101%	3	11	12
Riesling	**192**	**430**	**622**	**499**	69%	125%	8	11	13
Sauvignon Blanc	**1402**	**5317**	**6719**	**6256**	79%	107%	12	26	34
Semillon	**52**	**1425**	**1477**	**1274**	96%	116%	3	15	16
Traminer	**27**	**14**	**41**	**47**	34%	87%	1	2	2
Verdelho	**0**	**319**	**319**	**345**	100%	93%	0	4	3
Viognier	**26**	**459**	**485**	**466**	95%	104%	1	16	14
Total WHITE	**2917**	**16897**	**19815**	**18210**	85%	109%			
Total for region	**3959**	**34685**	**38645**	**34227**					

ADELAIDE HILLS CROP VALUE DATA - VINTAGE 2004

Table 2.3

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Barbera	**1**	**1**	$1,272	$1,272			**$1,200**	*100%*
Cabernet Franc	**94**	**119**	$94,915	$119,275	$300	$1,800	**$1,006**	*100%*
Cabernet Sauvignon	**3137**	**3369**	$4,032,196	$4,329,418	$200	$3,900	**$1,285**	*100%*
Gamay	**9**	**9**	$5,604	$5,604			**$600**	*100%*
Grenache	**74**	**74**	$119,080	$119,080			**$1,612**	*100%*
Malbec	**12**	**21**	$12,310	$21,337			**$1,001**	*100%*
Mataro (Mouvedre)	**25**	**25**	$28,120	$28,120			**$1,118**	*100%*
Merlot	**3757**	**3884**	$4,103,162	$4,241,256	$200	$2,070	**$1,092**	*100%*
Meunier	**562**	**568**	$879,821	$888,398	$550	$2,196	**$1,565**	*100%*
Nebbiolo	**12**	**12**	$9,660	$9,660			**$808**	*100%*
Petit Verdot	**35**	**35**	$41,034	$41,034	$1,100	$1,500	**$1,165**	*100%*
Pinot Noir	**7079**	**7461**	$9,532,451	$10,047,065	$200	$2,475	**$1,347**	*100%*
Sangiovese	**125**	**125**	$146,500	$146,500	$300	$1,700	**$1,174**	*100%*
Shiraz	**2796**	**3015**	$4,676,878	$5,043,249	$250	$3,900	**$1,673**	*99%*
Tempranillo	**55**	**81**	$91,767	$135,274	$1,000	$2,071	**$1,680**	*100%*
Total RED	**17775**	**18798**	**$23,774,770**	**$25,176,543**				
WHITE								
Chardonnay	**8201**	**9403**	$13,696,594	$15,704,167	$500	$3,325	**$1,670**	*99%*
Marsanne	**3**	**3**	$5,652	$5,652			**$1,823**	*100%*
Other white (group	**51**	**51**	$60,754	$60,754			**$1,197**	*100%*
Pinot Gris	**678**	**695**	$1,153,267	$1,181,978	$1,000	$2,070	**$1,702**	*100%*
Riesling	**430**	**622**	$521,975	$754,554	$500	$1,900	**$1,213**	*100%*
Sauvignon Blanc	**5317**	**6719**	$8,525,413	$10,773,205	$600	$2,200	**$1,603**	*100%*
Semillon	**1425**	**1477**	$1,497,782	$1,552,441	$300	$1,800	**$1,051**	*100%*
Traminer	**14**	**41**	$12,776	$37,034			**$898**	*100%*
Verdelho	**319**	**319**	$464,880	$464,880	$500	$1,615	**$1,456**	*100%*
Viognier	**459**	**485**	$632,484	$668,081	$200	$2,071	**$1,378**	*100%*
Total WHITE	**16897**	**19815**	**$26,571,577**	**$31,202,746**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.

ADELAIDE HILLS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

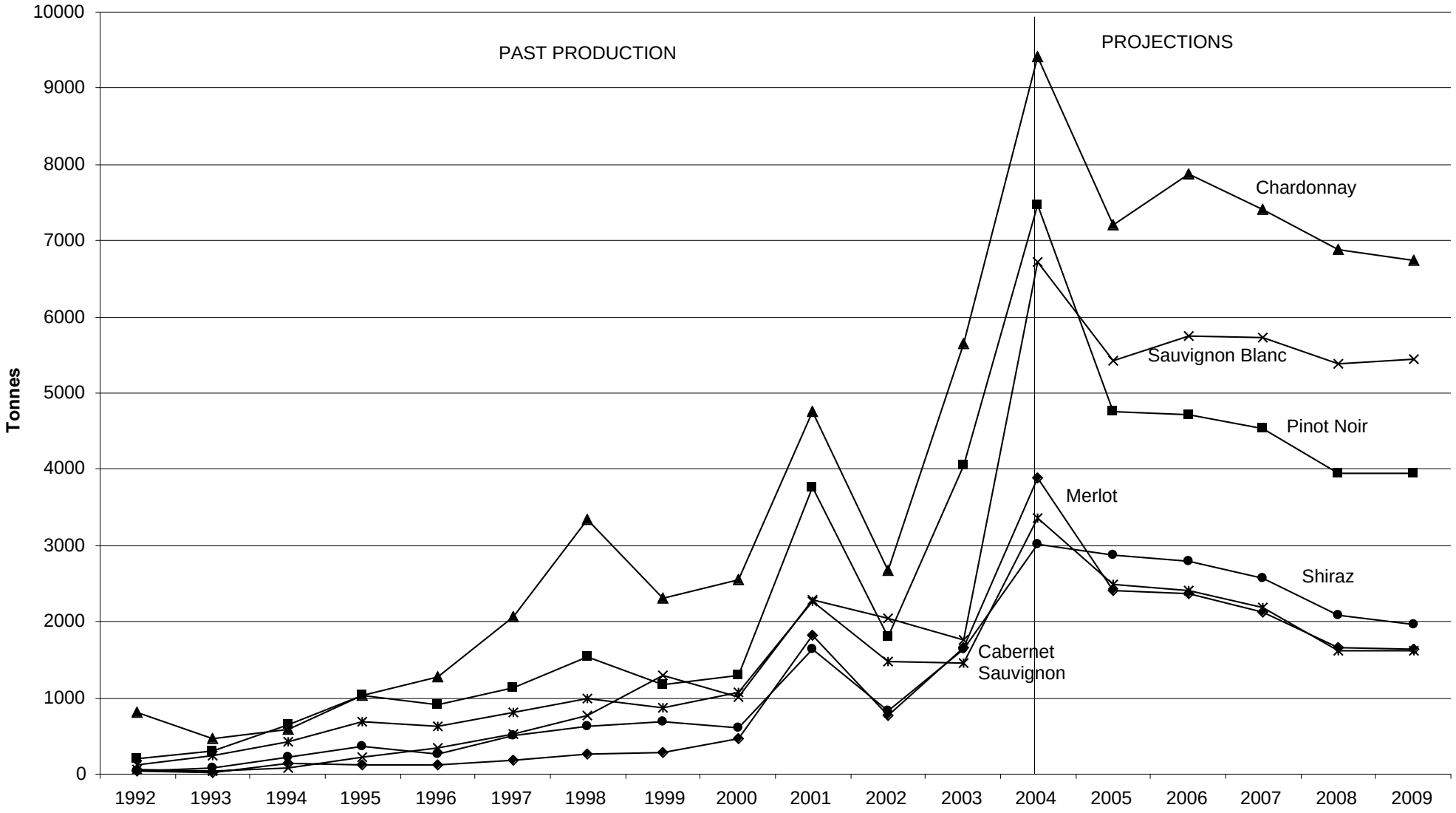
Table 2.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	5	5	5	5	5	5	5	5	5	5
Cabernet Franc	80	44	80	45	77	41	56	25	124	25
Cabernet Sauvignon	2494	1779	2399	1724	2194	1649	1627	1275	1616	1320
Grenache	70	70	70	70	70	70	70	70	70	70
Malbec	30	5	30	5	30	5	25	5	5	5
Mataro (Mouvedre)	25	20	25	20	25	20	27	20	29	20
Merlot	2407	1797	2376	1763	2135	1675	1658	1240	1632	1243
Meunier	302	302	291	291	263	263	242	242	242	242
Nebbiolo	10	10	10	10	12	12	14	14	16	16
Petit Verdot	29	0	30	0	31	0	31	5	32	5
Pinot Noir	4748	5172	4722	5185	4527	5060	3952	4554	3950	4554
Sangiovese	119	86	110	77	111	82	111	82	111	87
Shiraz	2880	2014	2793	1959	2564	1897	2091	1722	1956	1737
Other red	13	13	13	13	13	13	6	6	6	6
Tempranillo	79	74	81	74	81	74	82	79	82	79
Zinfandel	20	20	20	20	20	20	20	20	20	20
Total for RED	13311	11411	13055	11260	12158	10886	10016	9363	9896	9434
WHITE										
Chardonnay	7213	7156	7868	7830	7403	7552	6878	7188	6735	7213
Other white	9	0	9	0	9	0	9	0	9	0
Pinot Gris	691	703	836	911	977	1047	1019	1141	989	1186
Riesling	975	809	1042	863	1053	886	789	625	791	665
Sauvignon Blanc	5431	5493	5749	5801	5727	6001	5382	5689	5442	5839
Semillon	1044	1007	1009	968	890	859	723	682	700	664
Traminer	259	259	276	276	276	276	276	276	276	276
Verdelho	338	319	230	211	195	176	65	65	65	65
Viognier	340	361	377	440	378	492	348	493	283	494
Total for WHITE	16300	16107	17397	17299	16908	17288	15488	16159	15290	16402
Total for region	29611	27518	30452	28559	29066	28174	25504	25522	25186	25836

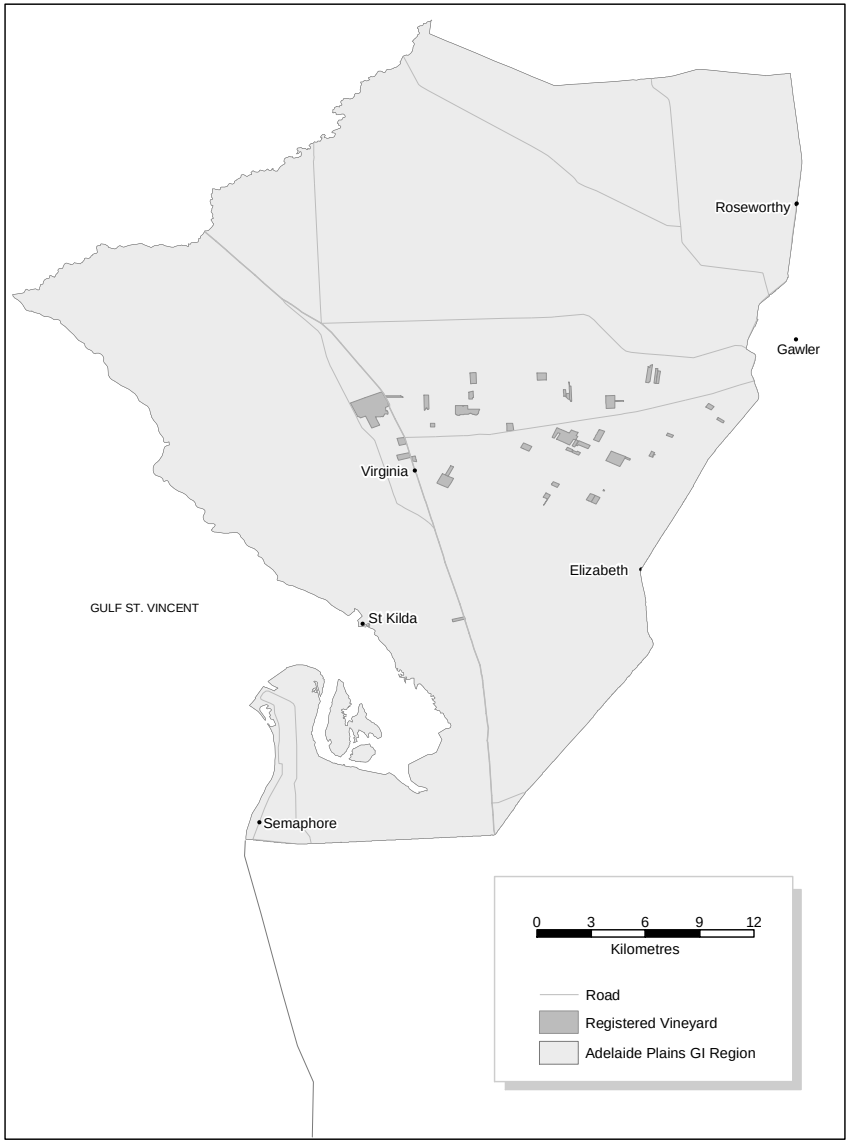
ADELAIDE HILLS PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1992 - 2009

Past production and projections (major varieties)

Figure 2.1



ADELAIDE PLAINS VINTAGE OVERVIEW



Vintage report

The weather was good to the Adelaide Plains region in 2003-4. After a dry winter, we were pleased to see good rains in the later part of August and early September. Cold conditions played a part in September through to October but no frost damage was reported and only slight wind damage in the Shiraz – mainly the top tips of the shoots.

The weather stayed kind to us and there was good flowering and fruit set. A dry November meant that by the end of the month, the soil was starting to really dry out.

December remained dry – with several days rocketing to the low 40°Cs – causing some early headaches for growers monitoring ripening and watering.

The Adelaide Plains region has one of the lowest incidences of pests and diseases in Australia and this season also did not present any problems, particularly with downy or powdery mildew. The dry continued into January, but much cooler. More good weather and the grapes ripened well.

Vintage 2004 arrived with an earlier than usual harvest for Chardonnay – some as early as the first days of February.

Winemakers decided on the whites coming off early with lower baumes in order to keep freshness and flavour before forecast hot weather could have a ruinous effect.

Some nights in February were very warm (damned hot) causing some problems with fruit temperature and during harvest itself. Tonnages were generally up.

Overall, quality for both whites and reds was good, with fruit coming off at a lower baume than normal due to the warm and unpredictable conditions. This helped retain flavours and kept the fruit in better than predicted condition. We are pretty happy with what we are working with – particularly the reds, with rich deep colours and full fruit flavours.

Dr Joe Ceravolo
President, Adelaide Plains Wine Region Inc

Overview of vintage statistics

The reported crush for the Adelaide Plains in 2004 was 7,003 tonnes. Although this was 27% more than in 2003, there was no surplus of white varieties, and only a small surplus of reds. However, there were substantial reductions in the average purchase value of the fruit – with Shiraz and Cabernet Sauvignon down by over $300 per tonne. The Chardonnay price only dropped by $30 per tonne. Despite this, income to growers overall remained about the same, because of the higher tonnages.

The forecast is for intake of red varieties to decline to less than 3,000 tonnes, while whites remain at around 2,500 tonnes.

There were 40 hectares of white varieties planted in the region in 2003 – a 20% increase. Production estimates for 2009 suggest a small surplus in red varieties compared with intake requirements.

ADELAIDE PLAINS CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 3.1

Current area in hectares by year planted

Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
CABERNET FRANC	3	0	0	0	0	0	3	0%
CABERNET SAUVIGNON	50	4	10	1	0	0	65	0%
GRENACHE	23	0	1	4	0	0	28	0%
MALBEC	7	0	0	0	0	0	7	0%
MATARO (MOUVEDRE)	4	0	0	0	0	0	4	0%
MERLOT	25	3	9	8	0	0	45	0%
PETIT VERDOT	0	2	0	0	0	0	2	0%
PINOT NOIR	20	0	0	0	0	0	20	0%
RUBY CABERNET	4	0	2	0	0	0	6	0%
SANGIOVESE	1	0	4	1	0	0	6	0%
SHIRAZ	131	2	18	32	0	0	183	0%
OTHER RED	1	0	2	1	0	0	3	0%
TOTAL RED WINEGRAPES	**269**	**10**	**45**	**47**	**0**	**0**	**372**	**0%**
WHITE WINEGRAPES								
CHARDONNAY	56	0	6	4	2	20	89	23%
CHENIN BLANC	5	0	0	0	0	0	5	0%
COLOMBARD	7	0	0	0	1	0	8	0%
MUSCAT BLANC	1	0	0	0	0	0	1	0%
MUSCAT GORDO BLANCO	3	0	0	0	0	0	3	0%
RIESLING	17	0	0	0	0	0	17	0%
SAUVIGNON BLANC	24	0	0	7	0	20	51	39%
SEMILLON	9	0	0	0	0	0	9	0%
VERDELHO	1	0	0	0	0	0	1	0%
VIOGNIER	0	0	0	16	0	0	16	0%
TOTAL WHITE WINEGRAPES	**123**	**0**	**6**	**27**	**3**	**40**	**200**	**20%**
TOTAL ALL VARIETIES	**393**	**10**	**52**	**74**	**3**	**40**	**572**	**7%**

Note: some increase in area in this region is a result of including previously unregistered growers with older plantings.

ADELAIDE PLAINS TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 3.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Cabernet Sauvignon	**59**	**640**	**699**	**662**	92%	105%	3	6	7
Grenache	**3**	**519**	**521**	**551**	99%	95%	1	6	7
Malbec	**0**	**62**	**62**	**25**	100%	247%	0	3	2
Mataro (Mouvedre)	**0**	**81**	**81**	**46**	100%	176%	0	2	1
Merlot	**81**	**392**	**473**	**426**	83%	111%	2	6	7
Petit Verdot	**0**	**18**	**18**	**15**	100%	122%	0	1	1
Pinot Noir	**0**	**287**	**287**	**287**	100%	100%	0	1	1
Ruby Cabernet	**0**	**7**	**7**	**0**	100%		0	1	0
Sangiovese	**0**	**59**	**59**	**15**	100%	391%	0	2	1
Shiraz	**141**	**2318**	**2459**	**2124**	94%	116%	3	9	10
Zinfandel	**0**	**30**	**30**	**30**	100%	100%	0	1	1
Total RED	**283**	**4412**	**4696**	**4181**	94%	112%			
WHITE									
Chardonnay	**54**	**1042**	**1095**	**1113**	95%	98%	2	5	7
Chenin Blanc	**0**	**108**	**108**	**108**	100%	100%	0	2	2
Colombard	**55**	**102**	**158**	**162**	65%	97%	1	2	2
Muscat Gordo Blanco	**0**	**18**	**18**	**18**	100%	100%	0	2	2
Riesling	**21**	**169**	**190**	**183**	89%	104%	1	2	3
Sauvignon Blanc	**0**	**484**	**484**	**481**	100%	101%	0	6	6
Semillon	**0**	**179**	**179**	**186**	100%	96%	0	2	2
Viognier	**0**	**76**	**76**	**76**	100%	100%	0	1	1
Total WHITE	**130**	**2177**	**2307**	**2327**	94%	99%			
Total for region	**413**	**6589**	**7003**	**6509**					

ADELAIDE PLAINS CROP VALUE DATA - VINTAGE 2004

Table 3.3

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Cabernet Sauvignon	**640**	**699**	$516,082	$563,622	$250	$1,628	**$807**	*100%*
Grenache	**519**	**521**	$316,301	$318,021	$450	$1,200	**$610**	*100%*
Malbec	**62**	**62**	$38,514	$38,514	$250	$1,200	**$623**	*100%*
Mataro (Mouvedre)	**81**	**81**	$68,511	$68,511			**$849**	*100%*
Merlot	**392**	**473**	$331,675	$399,877	$250	$1,400	**$846**	*100%*
Petit Verdot	**18**	**18**	$14,640	$14,640			**$800**	*100%*
Pinot Noir	**287**	**287**	$251,405	$251,405			**$875**	*100%*
Ruby Cabernet	**7**	**7**	$5,131	$5,131			**$700**	*100%*
Sangiovese	**59**	**59**	$62,462	$62,462			**$1,066**	*100%*
Shiraz	**2318**	**2459**	$1,959,147	$2,078,308	$400	$2,200	**$845**	*100%*
Zinfandel	**30**	**30**	$21,098	$21,098			**$700**	*100%*
Total RED	**4412**	**4696**	**$3,584,966**	**$3,821,588**				
WHITE								
Chardonnay	**1042**	**1095**	$1,217,993	$1,280,688	$500	$1,463	**$1,169**	*100%*
Chenin Blanc	**108**	**108**	$47,382	$47,382			**$439**	*100%*
Colombard	**102**	**158**	$67,841	$104,652			**$664**	*100%*
Muscat Gordo Blanco	**18**	**18**	$9,307	$9,307			**$517**	*100%*
Riesling	**169**	**190**	$118,510	$133,368			**$703**	*100%*
Sauvignon Blanc	**484**	**484**	$448,417	$448,417	$600	$2,000	**$926**	*100%*
Semillon	**179**	**179**	$125,310	$125,310			**$702**	*100%*
Viognier	**76**	**76**	$105,980	$105,980			**$1,400**	*100%*
Total WHITE	**2177**	**2307**	**$2,140,740**	**$2,255,105**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.

ADELAIDE PLAINS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

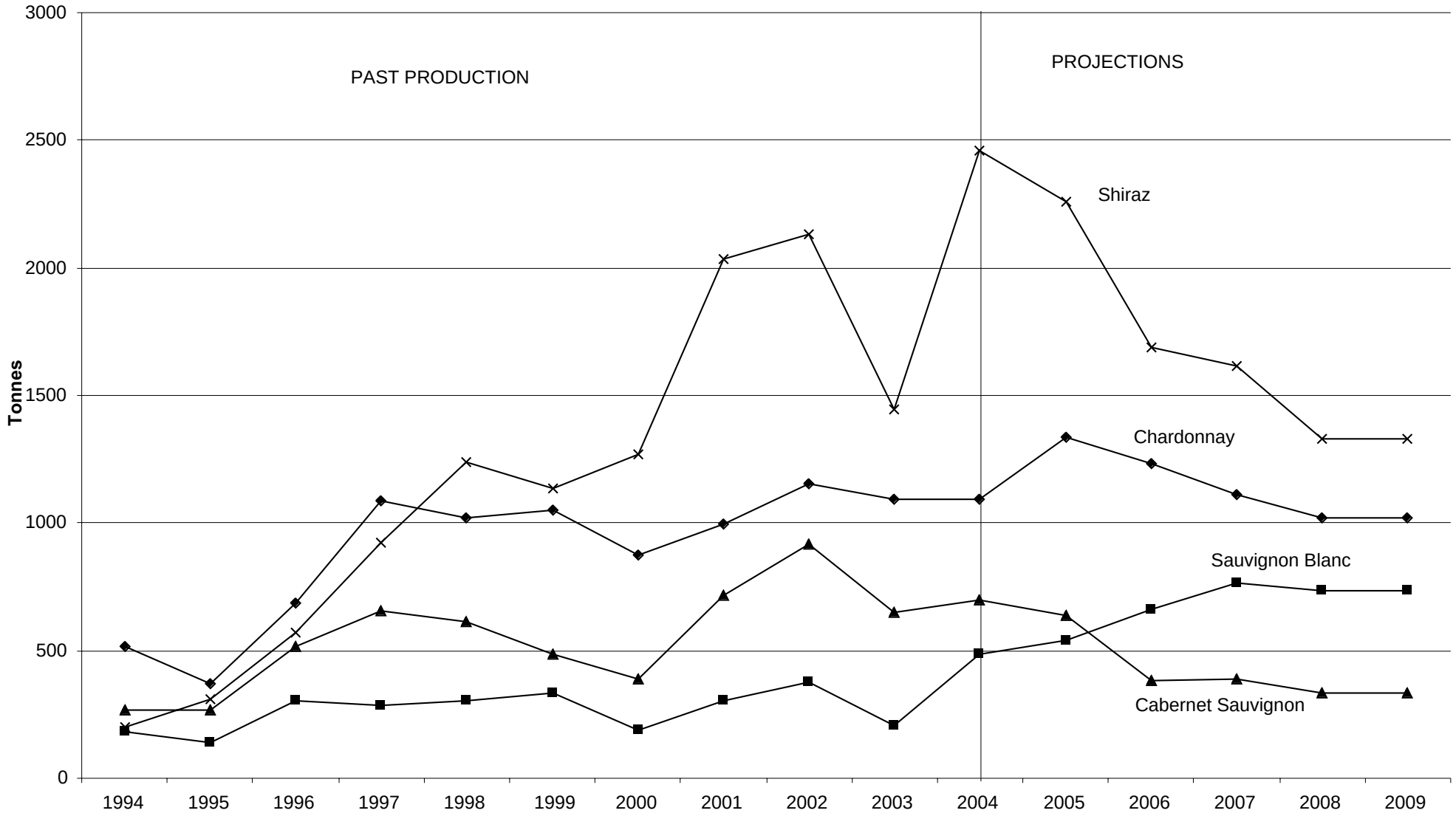
Table 3.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Sauvignon	**640**	**457**	**384**	**281**	**387**	**284**	**331**	**228**	**331**	**228**
Grenache	**440**	**350**	**270**	**180**	**270**	**180**	**243**	**153**	**243**	**153**
Malbec	**75**	**0**	**60**	**0**	**60**	**0**	**60**	**0**	**60**	**0**
Mataro (Mouvedre)	**40**	**40**	**20**	**20**	**20**	**20**	**0**	**0**	**0**	**0**
Merlot	**551**	**484**	**584**	**524**	**563**	**503**	**458**	**398**	**458**	**398**
Petit Verdot	**15**	**15**	**15**	**15**	**15**	**15**	**15**	**15**	**15**	**15**
Pinot Noir	**314**	**314**	**314**	**314**	**314**	**314**	**224**	**224**	**224**	**224**
Ruby Cabernet	**5**	**5**	**5**	**5**	**5**	**5**	**5**	**5**	**5**	**5**
Sangiovese	**65**	**15**	**65**	**15**	**65**	**15**	**65**	**15**	**65**	**15**
Shiraz	**2262**	**1852**	**1690**	**1280**	**1614**	**1204**	**1332**	**922**	**1332**	**922**
Total for RED	**4407**	**3532**	**3407**	**2634**	**3313**	**2540**	**2733**	**1960**	**2733**	**1960**
WHITE										
Chardonnay	**1338**	**1338**	**1235**	**1235**	**1109**	**1109**	**1021**	**1021**	**1021**	**1021**
Chenin Blanc	**24**	**24**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Colombard	**159**	**162**	**148**	**150**	**150**	**150**	**150**	**150**	**150**	**150**
Muscat Gordo Blanco	**26**	**26**	**26**	**26**	**26**	**26**	**26**	**26**	**26**	**26**
Riesling	**177**	**177**	**177**	**177**	**177**	**177**	**137**	**137**	**137**	**137**
Sauvignon Blanc	**543**	**543**	**664**	**664**	**764**	**764**	**737**	**737**	**737**	**737**
Semillon	**150**	**150**	**50**	**50**	**50**	**50**	**50**	**50**	**50**	**50**
Viognier	**200**	**200**	**200**	**200**	**200**	**200**	**200**	**200**	**200**	**200**
Total for WHITE	**2617**	**2620**	**2500**	**2502**	**2476**	**2476**	**2321**	**2321**	**2321**	**2321**
Total for region	**7024**	**6152**	**5907**	**5136**	**5789**	**5016**	**5054**	**4281**	**5054**	**4281**

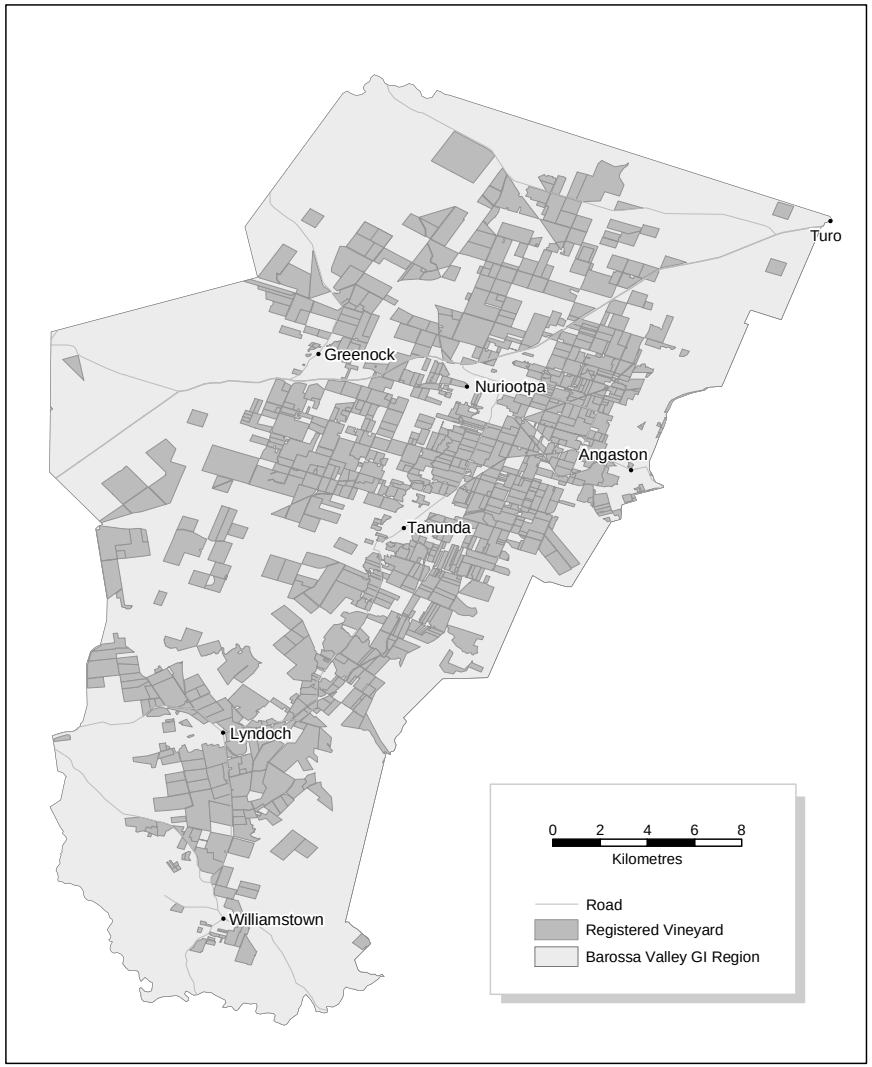
ADELAIDE PLAINS PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1994 - 2009

Figure 3.1

Past production and projections (major varieties)



BAROSSA VALLEY VINTAGE OVERVIEW



Vintage report

A heavy fruitset initially had predictions for high yields in the Barossa, but bunch thinning aound veraison brought crop levels back to manageable levels with promising quality. A mild January was excellent for optimal colour production and flavour development. Heatwave conditions in mid-February saw acidity decline at a rapid rate in conjunction with rising baume levels. Harvest began earlier than first predicted, with the earliest Shiraz being picked in late February. Quality expectations returned to high after the February scare – the Barossa experienced an Indian summer with no huge rainfall events and temperatures ranging between 25 and 30 degrees. Semillon is some of the best ever and Shiraz has good colour with elegant flavours.

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Overview of vintage statistics

There were 70,574 tonnes crushed from Barossa Valley vineyards in 2004 – nearly 50% more than in 2003, and 13,000 tonnes more than the previous record vintage of 2002. Despite the record tonnage, whites were still in short supply – particularly Chardonnay – while there was a surplus of reds.

The calculated average purchase value of the major red varieties was generally lower, with Cabernet Sauvignon (down $350 per tonne) and Merlot (down $450 per tonne) the hardest hit. Average values of white varieties were generally similar to 2003. Overall, income to growers increased substantially (up by more than 25%) because of the extra tonnages, while the total value of grapes from the region was up from $67.5 million last year to $87 million this year.

The forecast is for intake of red varieties to increase from 50,000 tonnes in 2005 to 56,000 tonnes in 2008 with a surplus in each forecast year between estimated and preferred intake. White varieties are expected to remain at around 20,000 tonnes, with a shortfall between estimated and preferred intake. The region is expected to remain dominated by Shiraz, which accounts for nearly 50% of the total intake; however, there is a surplus of over 3,000 tonnes forecast between estimated and preferred intake of Shiraz in most years.

There were 250 hectares (3%) of new plantings in 2003 – more than half in Shiraz. Based on the current vineyard area, and using yield estimates of 10 t/ha for reds and 11 t/ha for whites, the estimated production from the Barossa in 2009 is approximately 93,000 tonnes. This means an approximate surplus of 20,000 tonnes of red varieties (40%) and 3,000 tonnes of whites compared with the 2009 preferred intake figures. While demand forecasts do change from year to year, this discrepancy may foreshadow some difficulties for growers without contracts in the future.

BAROSSA VALLEY* CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 4.1

Current area in hectares by year planted

Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
CABERNET FRANC	42	0	3	0	0	0	45	0%
CABERNET SAUVIGNON	870	137	149	185	68	6	1415	0%
GRENACHE	551	26	24	13	26	12	652	2%
MALBEC	18	0	0	0	0	0	18	0%
MATARO (MOUVEDRE)	99	7	16	23	3	2	150	1%
MERLOT	147	31	30	60	43	12	323	4%
NEBBIOLO	0	5	10	0	0	0	16	0%
PETIT VERDOT	6	4	4	13	0	0	28	1%
PINOT NOIR	70	2	1	0	0	0	74	1%
SANGIOVESE	12	1	6	0	0	0	19	0%
SHIRAZ	2501	408	330	397	424	151	4210	4%
TEMPRANILLO	0	0	2	18	10	3	32	8%
OTHER RED	33	2	7	4	6	2	55	4%
TOTAL RED WINEGRAPES	**4349**	**625**	**582**	**713**	**580**	**188**	**7036**	**3%**
WHITE WINEGRAPES								
CHARDONNAY	512	0	10	8	23	40	593	7%
CHENIN BLANC	48	0	0	0	0	0	48	0%
MARSANNE	1	1	0	0	2	1	5	27%
MUSCAT BLANC	45	0	0	0	0	1	46	1%
RIESLING	338	5	11	6	28	17	405	4%
SAUVIGNON BLANC	90	0	0	0	25	0	115	0%
SEMILLON	688	6	4	5	3	0	705	0%
TRAMINER	8	0	0	0	0	0	8	0%
VERDELHO	3	1	1	0	0	0	5	0%
VIOGNIER	1	1	5	14	10	2	33	6%
OTHER WHITE	110	0	0	2	2	1	115	1%
TOTAL WHITE WINEGRAPES	**1843**	**15**	**31**	**35**	**93**	**62**	**2078**	**3%**
ROOTSTOCK BLOCK	0	15	0	0	0	0	15	0%
TOTAL ALL VARIETIES	**6121**	**639**	**613**	**734**	**674**	**250**	**9030**	**3%**

Also includes plantings in "Barossa Zone - other" (99ha)

BAROSSA VALLEY TONNES CRUSHED BY VARIETY (RED) - VINTAGE 2004

Table 4.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for		
							Own	Other	Preferred
Barbera	**3**	**0**	**3**	**0**	0%		1	0	0
Cabernet Franc	**77**	**233**	**310**	**246**	75%	126%	6	10	12
Cabernet Sauvignon	**2183**	**6855**	**9038**	**6932**	76%	130%	28	26	36
Dolcetto	**7**	**0**	**7**	**5**	0%	140%	1	0	1
Grenache	**820**	**3849**	**4668**	**4328**	82%	108%	18	22	28
Malbec	**61**	**70**	**131**	**100**	53%	132%	7	4	7
Mataro (Mouvedre)	**308**	**572**	**880**	**799**	65%	110%	8	14	17
Merlot	**574**	**1716**	**2290**	**2099**	75%	109%	16	17	26
Meunier	**0**	**0**	**0**	**0**	0%	100%	1	0	1
Nebbiolo	**68**	**2**	**70**	**32**	3%	220%	2	1	2
Other red (group together)	**25**	**14**	**39**	**29**	36%	135%	2	4	4
Petit Verdot	**48**	**76**	**124**	**46**	61%	271%	4	8	6
Pinot Noir	**55**	**644**	**699**	**479**	92%	146%	4	14	14
Sangiovese	**25**	**143**	**168**	**149**	85%	112%	3	5	5
Shiraz	**5736**	**25409**	**31145**	**25836**	82%	121%	36	37	50
Tempranillo	**2**	**68**	**70**	**71**	97%	99%	1	4	5
Tinta Cao	**0**	**25**	**25**	**0**	100%		0	1	0
Tinta Molle	**0**	**10**	**10**	**10**	100%	98%	0	1	1
Touriga	**25**	**129**	**154**	**148**	84%	104%	3	3	5
Zinfandel	**16**	**89**	**105**	**107**	84%	99%	4	4	8
Total RED	**10033**	**39905**	**49939**	**41416**	80%	121%			

BAROSSA VALLEY TONNES CRUSHED BY VARIETY (WHITE) - VINTAGE 2004

Table 4.3

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
Chardonnay	**1014**	**4897**	**5911**	**6997**	83%	84%	13	16	21
Chenin Blanc	**12**	**493**	**505**	**454**	98%	111%	2	7	7
Colombard	**0**	**12**	**12**	**0**	100%		0	1	0
Doradillo	**9**	**0**	**9**	**0**	0%		1	0	0
Marsanne	**13**	**1**	**14**	**16**	7%	90%	3	1	3
Muscadelle (Tokay)	**4**	**169**	**172**	**123**	98%	140%	1	8	8
Muscat Blanc (Frontignac)	**74**	**290**	**365**	**479**	80%	76%	4	6	9
Other white	**16**	**2**	**18**	**25**	10%	72%	4	1	5
Palomino	**88**	**2**	**90**	**81**	3%	111%	3	1	2
Pedro Ximenes	**53**	**62**	**116**	**63**	54%	182%	3	5	5
Riesling	**948**	**2322**	**3270**	**2856**	71%	114%	10	17	20
Roussanne	**2**	**0**	**2**	**2**	0%	100%	1	0	1
Sauvignon Blanc	**389**	**732**	**1121**	**1160**	65%	97%	5	10	10
Semillon	**775**	**7979**	**8754**	**8859**	91%	99%	19	20	30
Sylvaner	**0**	**16**	**16**	**16**	100%	100%	0	1	1
Traminer	**14**	**58**	**72**	**79**	80%	91%	1	3	3
Trebbiano	**0**	**9**	**9**	**1**	100%	631%	0	3	1
Verdelho	**0**	**52**	**52**	**52**	100%	100%	0	1	1
Viognier	**37**	**90**	**127**	**118**	71%	108%	5	4	8
Total WHITE	**3449**	**17187**	**20635**	**21380**	83%	97%			
Total for region*	**13482**	**57092**	**70574**	**62797**					

**Also includes production from "Barossa Zone - other" (365 tonnes)*

BAROSSA VALLEY CROP VALUE DATA (RED) - VINTAGE 2004

Table 4.4

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Cabernet Franc	**233**	**310**	$191,269	$254,607	$333	$1,100	**$821**	*100%*
Cabernet Sauvignon	**6855**	**9038**	$7,688,691	$10,137,156	$200	$5,730	**$1,122**	*92%*
Grenache	**3849**	**4668**	$4,691,471	$5,690,645	$383	$4,000	**$1,219**	*100%*
Malbec	**70**	**131**	$80,431	$150,396	$400	$1,750	**$1,145**	*100%*
Mataro (Mouvedre)	**572**	**880**	$813,253	$1,251,310	$300	$4,000	**$1,421**	*100%*
Merlot	**1716**	**2290**	$1,729,236	$2,307,774	$175	$3,000	**$1,008**	*96%*
Nebbiolo	**2**	**70**	$3,105	$95,013			**$1,350**	*100%*
Other red	**14**	**39**	$14,852	$40,940			**$1,045**	*100%*
Petit Verdot	**76**	**124**	$59,626	$97,393	$300	$2,000	**$787**	*100%*
Pinot Noir	**644**	**699**	$503,692	$546,609	$300	$1,688	**$782**	*100%*
Sangiovese	**143**	**168**	$191,527	$224,628	$500	$1,800	**$1,338**	*100%*
Shiraz	**25409**	**31145**	$37,173,888	$45,564,908	$200	$10,000	**$1,463**	*91%*
Tempranillo	**68**	**70**	$106,630	$109,761	$1,400	$2,000	**$1,565**	*100%*
Tinta Molle	**10**	**10**	$7,512	$7,512			**$768**	*100%*
Touriga	**129**	**154**	$106,342	$126,526	$300	$1,500	**$823**	*100%*
Zinfandel	**89**	**105**	$127,276	$150,837	$550	$2,110	**$1,433**	*100%*
Total RED	**39880**	**49903**	**$53,488,801**	**$66,756,015**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.

BAROSSA VALLEY CROP VALUE DATA (WHITE) - VINTAGE 2004

Table 4.5

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
WHITE								
Chardonnay	**4897**	**5911**	$5,965,430	$7,200,734	$700	$1,688	**$1,218**	*100%*
Chenin Blanc	**493**	**505**	$257,948	$264,200	$300	$600	**$523**	*100%*
Colombard	**12**	**12**	$7,576	$7,576			**$650**	*100%*
Marsanne	**1**	**14**	$1,250	$18,000			**$1,250**	*100%*
Muscadelle (Tokay)	**168**	**172**	$88,994	$90,880	$300	$1,567	**$528**	*100%*
Muscat Blanc (Frontignac)	**290**	**365**	$184,934	$232,256	$500	$1,500	**$637**	*100%*
Other white (group	**2**	**18**	$2,492	$25,284			**$1,400**	*100%*
Palomino	**2**	**90**	$570	$22,285			**$248**	*100%*
Pedro Ximenes	**62**	**116**	$20,782	$38,554	$250	$750	**$334**	*100%*
Riesling	**2322**	**3270**	$2,341,595	$3,297,640	$450	$1,800	**$1,009**	*100%*
Sauvignon Blanc	**732**	**1121**	$710,121	$1,087,302	$475	$1,125	**$970**	*100%*
Semillon	**7979**	**8754**	$6,274,944	$6,884,530	$400	$1,430	**$786**	*100%*
Sylvaner	**16**	**16**	$4,782	$4,782			**$300**	*100%*
Traminer	**58**	**72**	$46,244	$57,447	$550	$800	**$795**	*100%*
Trebbiano	**9**	**9**	$3,348	$3,348	$195	$500	**$379**	*100%*
Verdelho	**52**	**52**	$54,726	$54,726			**$1,050**	*100%*
Viognier	**90**	**127**	$145,935	$205,817	$1,200	$2,250	**$1,618**	*100%*
Total WHITE	**17186**	**20624**	**$16,111,671**	**$19,495,360**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
(3) This does not include end use bonuses or other adjustments determined post-receival.

BAROSSA VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

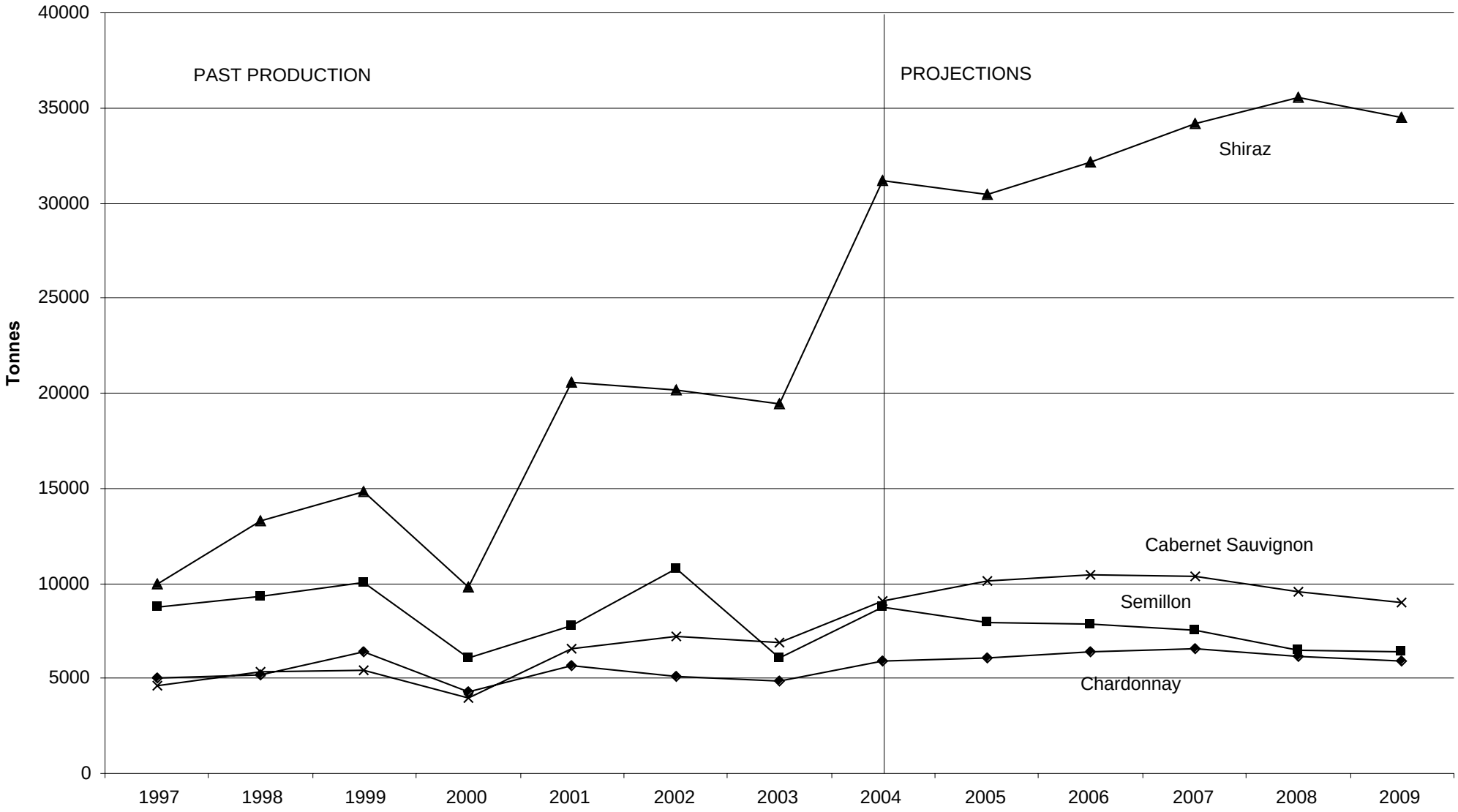
Table 4.6

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	**4**	**0**	**8**	**0**	**10**	**0**	**10**	**0**	**10**	**0**
Cabernet Franc	**264**	**205**	**237**	**190**	**246**	**209**	**193**	**156**	**193**	**176**
Cabernet Sauvignon	**10154**	**8342**	**10413**	**8429**	**10382**	**8786**	**9516**	**8359**	**8951**	**7912**
Grenache	**4377**	**4240**	**4474**	**4341**	**4669**	**4652**	**4834**	**4946**	**4905**	**5226**
Malbec	**112**	**67**	**117**	**67**	**142**	**67**	**115**	**67**	**115**	**67**
Mataro (Mouvedre)	**904**	**879**	**1043**	**1016**	**1080**	**1052**	**1114**	**1093**	**1124**	**1093**
Merlot	**2663**	**2562**	**3012**	**2857**	**3310**	**3230**	**3594**	**3557**	**3598**	**3633**
Nebbiolo	**82**	**32**	**82**	**32**	**82**	**32**	**82**	**32**	**82**	**32**
Other red	**69**	**34**	**116**	**81**	**118**	**83**	**118**	**83**	**118**	**83**
Petit Verdot	**132**	**68**	**139**	**74**	**139**	**75**	**113**	**49**	**113**	**49**
Pinot Noir	**583**	**442**	**556**	**414**	**511**	**369**	**453**	**311**	**364**	**222**
Sangiovese	**152**	**137**	**152**	**137**	**134**	**119**	**136**	**121**	**136**	**121**
Shiraz	**30441**	**26866**	**32149**	**28698**	**34168**	**30984**	**35531**	**32955**	**34470**	**31992**
Tempranillo	**188**	**184**	**254**	**246**	**292**	**283**	**300**	**288**	**300**	**288**
Touriga	**113**	**111**	**116**	**114**	**116**	**114**	**116**	**114**	**116**	**114**
Zinfandel	**104**	**78**	**84**	**83**	**84**	**83**	**84**	**83**	**84**	**83**
Total for RED	**50341**	**44247**	**52951**	**46779**	**55483**	**50138**	**56308**	**52214**	**54678**	**51090**
WHITE										
Chardonnay	**6090**	**7394**	**6404**	**7615**	**6560**	**7944**	**6144**	**7535**	**5881**	**7211**
Chenin Blanc	**373**	**367**	**338**	**367**	**312**	**336**	**214**	**238**	**214**	**238**
Marsanne	**17**	**17**	**27**	**27**	**27**	**27**	**27**	**27**	**27**	**27**
Muscadelle (Tokay)	**107**	**77**	**92**	**74**	**92**	**74**	**92**	**74**	**92**	**74**
Muscat Blanc	**343**	**419**	**363**	**425**	**363**	**419**	**363**	**418**	**363**	**418**
Other white	**64**	**67**	**73**	**76**	**80**	**83**	**80**	**83**	**58**	**61**
Palomino	**94**	**94**	**96**	**96**	**94**	**94**	**96**	**96**	**96**	**96**
Pedro Ximenes	**95**	**65**	**94**	**64**	**89**	**64**	**89**	**64**	**89**	**64**
Riesling	**3316**	**3395**	**3438**	**3587**	**3750**	**3948**	**3645**	**3741**	**3664**	**3705**
Sauvignon Blanc	**1002**	**1125**	**982**	**1110**	**987**	**1126**	**918**	**1065**	**923**	**1075**
Semillon	**7949**	**8300**	**7847**	**8156**	**7547**	**7787**	**6518**	**6793**	**6371**	**6706**
Traminer	**87**	**92**	**87**	**94**	**87**	**98**	**62**	**73**	**47**	**58**
Verdelho	**36**	**36**	**36**	**36**	**42**	**42**	**42**	**42**	**42**	**42**
Viognier	**178**	**193**	**236**	**245**	**282**	**282**	**288**	**283**	**293**	**283**
Total for WHITE	**19751**	**21641**	**20113**	**21972**	**20312**	**22324**	**18578**	**20532**	**18160**	**20058**
Total for region	**70092**	**65888**	**73064**	**68751**	**75795**	**72462**	**74886**	**72746**	**72838**	**71148**

BAROSSA VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1997 - 2009

Figure 4.1

Past production and projections (major varieties)



CLARE VALLEY VINTAGE OVERVIEW

Vintage report

The 2004 vintage had its challenges but the strength of the Clare Valley as a premium wine region has shone through, with some excellent wines produced, including some of the best Cabernet Sauvignon seen for several years.

Seasonal influences for the 2004 vintage were more dramatic than usual. From early October through to the end of vintage, Clare experienced less than half the long-term rainfall for that period. November was warmer than average, December the hottest for some time and then January was one of the coolest on record.

At the beginning of February the Clare Valley was looking picturesque with vineyards in excellent condition and healthy canopies appearing in balance with crop levels. Then a heatwave descended upon the Valley. For sixteen days the average maximum temperature was 37.9°C. It was difficult to remain positive as the heat took its toll on the vines.

Vintage commenced early, with a large percentage of Chardonnay and Semillon picked by the end of February. Following this, ripening slowed and generally within the district it was a long drawn-out vintage for wineries.

The 2004 Rieslings showed amazing resilience in the face of extreme weather conditions. Naturally, some loss of Riesling fruit occurred due to sunburn; however with greater attention to detail and by hand selection, this was easily separated. Above average Riesling yields were achieved and wines are displaying generous, full flavours with good concentration.

Cabernet Sauvignon was one of the highlights of the vintage with many winemakers reporting excellent parcels of fruit. The wines are exhibiting generosity of flavour with ripe tannin structure, good varietal character and excellent colour. Bunch stem necrosis, probably due to heat and lack of moisture, diminished crop levels in some vineyards.

Kerri Thompson

Chairman, Clare Valley Winemakers Inc.

Overview of vintage statistics

The Clare Valley produced 33,023 tonnes in 2004 – 72% up on the drought-affected 2003 vintage, and 6,000 tonnes more than the previous record harvest in 2002. There were significant surpluses in red varieties, especially Shiraz, but supply and demand for whites were in balance. Prices held up reasonably well compared with many regions; the average purchase value for most of the major varieties dropping by around $100 per tonne, while the average value for Riesling and Semillon actually increased. Total income to growers nearly doubled, because of the high tonnages, and the total value of grapes to the region increased from $29 million in 2003 to $45 million.

The forecast is for a slight decline in intake of red varieties, from 25,000 in 2005 to 22,000 in 2009. Preferred intake is below the estimated figure in each year. Intake of white varieties is expected to stabilise at around 12,000 tonnes, with supply and demand in balance. Riesling is expected to overtake Cabernet Sauvignon as the second most important variety for the region in 2008, and is the only variety where the forecast is for more intake in 2009 than was produced in 2004.

Consistent with the intake forecasts, there were 96 hectares of Riesling (11% increase) planted in 2003, following a similar increase the previous year. The area of Riesling has increased by nearly one third in the past two planting seasons.

CLARE VALLEY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 5.1

	Current area in hectares by year planted							
Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
BARBERA	0	2	0	1	0	0	3	0%
CABERNET FRANC	24	2	0	1	0	0	26	0%
CABERNET SAUVIGNON	956	132	74	23	9	3	1196	0%
GRENACHE	62	0	4	2	0	0	69	0%
MALBEC	45	23	7	1	2	1	79	1%
MATARO (MOUVEDRE)	4	1	4	5	2	2	17	10%
MERLOT	241	33	2	0	10	1	286	0%
NEBBIOLO	1	2	1	0	0	0	4	0%
PETIT VERDOT	18	1	2	0	2	0	22	0%
PINOT NOIR	15	0	0	0	0	0	15	0%
RUBY CABERNET	2	0	0	0	0	0	2	0%
SANGIOVESE	11	13	9	1	1	0	34	0%
SHIRAZ	1161	265	139	48	29	22	1664	1%
TEMPRANILLO	0	4	1	0	3	1	10	15%
OTHER RED	6	2	2	0	1	0	11	4%
TOTAL RED WINEGRAPES	**2545**	**480**	**244**	**82**	**58**	**30**	**3439**	**1%**
WHITE WINEGRAPES								
CHARDONNAY	346	0	1	0	3	7	359	2%
CHENIN BLANC	2	0	0	0	0	0	2	0%
MUSCAT BLANC	2	0	0	0	0	0	2	0%
RIESLING	519	40	68	69	118	96	911	11%
SAUVIGNON BLANC	33	0	0	0	0	0	34	0%
SEMILLON	191	0	0	0	0	0	191	0%
TRAMINER	14	0	0	0	0	9	23	38%
VERDELHO	2	0	1	1	0	0	4	0%
VIOGNIER	2	1	6	1	3	0	12	0%
OTHER WHITE	13	0	1	0	4	0	18	0%
TOTAL WHITE WINEGRAPES	**1125**	**42**	**78**	**71**	**128**	**113**	**1557**	**7%**
TOTAL ALL VARIETIES	**3670**	**522**	**323**	**153**	**186**	**143**	**4995**	**3%**

Note: some increase in area in this region is a result of including previously unregistered growers with older plantings.

CLARE VALLEY TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 5.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Barbera	**13**	**0**	**13**	**13**	0%	100%	2	0	2
Cabernet Franc	**73**	**69**	**142**	**103**	49%	138%	7	4	6
Cabernet Sauvignon	**3056**	**3659**	**6715**	**5304**	54%	127%	21	22	28
Grenache	**63**	**299**	**363**	**312**	83%	116%	3	13	14
Malbec	**222**	**158**	**380**	**238**	42%	159%	9	9	13
Mataro (Mouvedre)	**21**	**68**	**90**	**102**	76%	88%	4	5	7
Merlot	**823**	**1217**	**2040**	**1814**	60%	112%	13	12	18
Nebbiolo	**14**	**0**	**14**	**14**	0%	100%	1	0	1
Other red	**28**	**0**	**28**	**28**	0%	100%	1	0	1
Petit Verdot	**55**	**88**	**143**	**99**	62%	145%	4	5	5
Pinot Noir	**104**	**39**	**142**	**119**	27%	119%	2	4	3
Ruby Cabernet	**10**	**0**	**10**	**10**	0%	100%	1	0	1
Sangiovese	**86**	**83**	**169**	**121**	49%	140%	2	5	2
Shiraz	**3526**	**8583**	**12109**	**8661**	71%	140%	17	23	29
Tempranillo	**26**	**1**	**27**	**36**	2%	74%	3	1	4
Total RED	**8121**	**14265**	**22385**	**16975**	64%	132%			
WHITE									
Chardonnay	**1645**	**1346**	**2991**	**3010**	45%	99%	9	14	16
Chenin Blanc	**12**	**3**	**14**	**12**	18%	122%	1	1	1
Crouchen	**48**	**0**	**48**	**35**	0%	138%	1	0	1
Muscadelle (Tokay)	**19**	**0**	**19**	**19**	0%	100%	1	0	1
Muscat Gordo Blanco	**4**	**4**	**8**	**8**	51%	103%	1	1	1
Other white (group together)	**69**	**0**	**69**	**61**	0%	114%	3	0	3
Pedro Ximenes	**0**	**10**	**10**	**0**	100%		0	1	0
Pinot Gris	**9**	**2**	**11**	**20**	20%	56%	1	1	2
Riesling	**2613**	**2676**	**5289**	**5132**	51%	103%	21	23	31
Sauvignon Blanc	**266**	**49**	**315**	**327**	16%	96%	5	4	6
Semillon	**570**	**1093**	**1663**	**1609**	66%	103%	10	16	19
Traminer	**114**	**38**	**151**	**111**	25%	137%	4	1	5
Verdelho	**17**	**0**	**17**	**17**	0%	100%	1	0	1
Viognier	**12**	**19**	**31**	**35**	62%	90%	1	3	4
Total WHITE	**5398**	**5240**	**10638**	**10394**	49%	102%			
Total for region	**13518**	**19505**	**33023**	**27369**					

CLARE VALLEY CROP VALUE DATA - VINTAGE 2004

Table 5.3

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Cabernet Franc	**69**	**142**	$68,017	$139,502	$750	$1,200	**$985**	*100%*
Cabernet Sauvignon	**3659**	**6715**	$4,652,566	$8,538,894	$500	$2,650	**$1,272**	*100%*
Grenache	**299**	**363**	$350,199	$424,283	$650	$2,000	**$1,169**	*100%*
Malbec	**158**	**380**	$227,516	$546,690	$600	$2,125	**$1,440**	*100%*
Mataro (Mouvedre)	**68**	**90**	$91,744	$120,290	$420	$1,800	**$1,342**	*100%*
Merlot	**1217**	**2040**	$1,520,225	$2,547,975	$900	$1,800	**$1,249**	*100%*
Petit Verdot	**88**	**143**	$72,292	$117,526	$700	$1,700	**$819**	*100%*
Pinot Noir	**39**	**142**	$26,251	$96,423	$600	$1,000	**$678**	*100%*
Sangiovese	**83**	**169**	$80,172	$162,671	$700	$1,150	**$962**	*98%*
Shiraz	**8583**	**12109**	$12,719,138	$17,944,719	$672	$3,000	**$1,482**	*100%*
Tempranillo	**1**	**27**	$918	$45,764			**$1,700**	*100%*
Total RED	**14265**	**22320**	**$19,809,038**	**$30,684,736**				
WHITE								
Chardonnay	**1346**	**2991**	$1,757,318	$3,903,882	$900	$1,800	**$1,305**	*100%*
Chenin Blanc	**3**	**14**	$1,820	$10,066			**$700**	*100%*
Muscat Gordo Blanco	**4**	**8**	$3,900	$7,700			**$1,000**	*100%*
Pedro Ximenes	**10**	**10**	$6,000	$6,000			**$600**	*100%*
Pinot Gris	**2**	**11**	$3,280	$16,459			**$1,464**	*100%*
Riesling	**2676**	**5289**	$4,258,840	$8,417,974	$900	$3,400	**$1,592**	*96%*
Sauvignon Blanc	**49**	**315**	$50,200	$320,696	$600	$1,350	**$1,018**	*100%*
Semillon	**1093**	**1663**	$1,123,107	$1,709,187	$500	$1,400	**$1,028**	*100%*
Traminer	**38**	**151**	$56,190	$226,780			**$1,498**	*100%*
Viognier	**19**	**31**	$32,216	$52,182	$1,450	$1,850	**$1,664**	*100%*
Total WHITE	**5240**	**10484**	**$7,292,871**	**$14,670,925**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.

CLARE VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

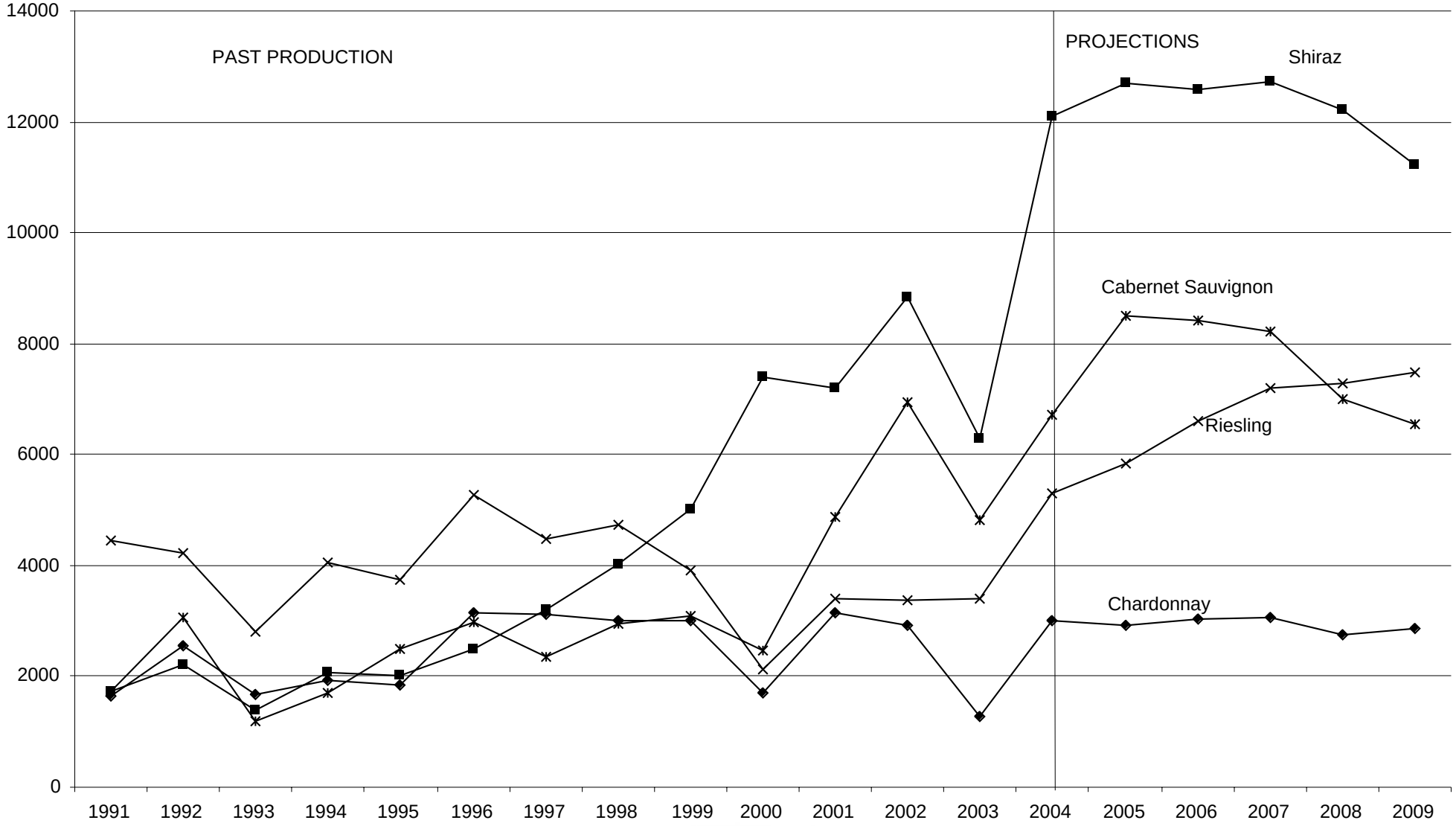
Table 5.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	30	30	30	30	30	30	30	30	30	30
Cabernet Franc	193	98	166	71	152	71	112	71	112	71
Cabernet Sauvignon	8516	6006	8404	6061	8225	6213	6991	5516	6546	5554
Dolcetto	15	15	15	15	15	15	15	15	15	15
Grenache	480	288	412	308	408	332	411	347	424	357
Malbec	375	261	398	276	413	291	311	291	311	291
Mataro (Mouvedre)	88	81	125	111	159	141	163	141	171	141
Merlot	2515	1996	2547	2000	2617	2068	2712	2219	2472	2241
Nebbiolo	19	15	19	15	19	15	19	15	19	15
Other red	15	15	15	15	15	15	15	15	15	15
Petit Verdot	234	34	246	34	246	34	246	34	121	34
Pinot Noir	145	123	145	123	133	123	100	90	100	90
Ruby Cabernet	12	12	12	12	12	12	12	12	12	12
Sangiovese	116	106	116	106	116	106	100	90	100	90
Shiraz	12686	9143	12585	9499	12734	10147	12221	10693	11219	11432
Tempranillo	40	40	50	50	60	60	80	80	100	100
Zinfandel	2	2	2	2	2	2	2	2	2	2
Total for RED	25480	18265	25287	18728	25355	19675	23539	19661	21768	20490
WHITE										
Chardonnay	2916	2894	3039	2976	3057	2992	2760	2921	2853	3054
Chenin Blanc	10	10	10	10	10	10	10	10	10	10
Crouchen	35	35	35	35	35	35	35	35	35	35
Muscadelle (Tokay)	10	10	10	10	10	10	10	10	10	10
Muscat Gordo Blanco	7	8	7	8	7	8	7	8	7	8
Other white	56	56	56	56	56	56	56	56	56	56
Pinot Gris	20	20	30	30	40	40	62	62	85	85
Riesling	5831	5541	6616	6146	7208	6749	7279	6965	7493	7254
Sauvignon Blanc	252	262	252	262	264	277	269	267	284	292
Semillon	1947	1778	1909	1737	1796	1707	1085	1097	1071	1098
Traminer	126	106	126	107	126	108	126	108	126	108
Verdelho	20	20	20	20	20	20	20	20	20	20
Viognier	29	30	36	37	49	50	54	55	54	55
Total for WHITE	11259	10769	12146	11433	12679	12062	11774	11614	12104	12085
Total for region	36739	29034	37433	30161	38034	31737	35313	31275	33872	32575

CLARE VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2009

Figure 5.1

Past production and projections (major varieties)



COONAWARRA VINTAGE OVERVIEW

Vintage Report

An ideal growing season leading into the 2004 vintage, combined with the maturation of new plantings, has resulted in a record vintage for the Coonawarra wine region.

The winter and spring conditions of 2003 were considered average in terms of temperature and rainfall, although budburst occurred slightly later than normal. Warmer weather in late spring and early summer produced ideal flowering conditions. The excellent flowering period achieved almost 100% fruit set, and all indications pointed to above average crop levels in all varieties.

Very cool and dry conditions during January accounted for the delay in veraison. The slow ripening conditions meant the start of vintage was approximately two weeks later than normal, in mid March.

Two rain episodes in March caused minor disruption to harvest, but also boosted soil moisture after a particularly dry summer and early autumn. Wind and sun immediately following both rainfalls ensured rapid drying of the vines and minimised any disease pressure. There were a number of isolated outbreaks of botrytis in some thinner-skinned varieties reported; however the vast majority of fruit was clean and disease free.

Post vintage assessments have been encouraging, with early reports identifying rich, ripe fruit flavours and good structure in the red wines, and attractive fruit and acid balance in the white wines. The region's winemakers are particularly pleased with the quality of Cabernet Sauvignon and Merlot wines, and there is widespread satisfaction with white wines, in particular Riesling and Chardonnay.

Bruce Redman
President, Coonawarra Vignerons Association

Overview of vintage statistics

Coonawarra produced 62,651 tonnes in 2004 – nearly three times the 2003 harvest, and almost 10,000 tonnes more than the previous record harvest of 53,125 tonnes in 2001. This was in spite of widespread crop thinning. There was a 33% surplus of red varieties, and a 20% surplus of whites.

The record tonnages produced big falls in the average purchase value of most varieties: Cabernet Sauvignon (down $700), Merlot (down $850) and Shiraz (down $1000 per tonne) were the hardest hit. The average purchase value of the white varieties held up reasonably well. On the other hand, the total income to the region's growers almost doubled because of the increased tonnages, and the total estimated value of grapes from the region increased from $41 million in 2003 to $69 million.

The forecast is for intake of red varieties to be around 37,000 tonnnes (compared with 55,000 tonnes this vintage) and whites to be around 5,500 tonnes (compared with 8,000 tonnes this vintage). Cabernet Sauvignon remains by far the most important variety for the region, accounting for nearly 50% of the total forecast intake. Despite the lack of forecast growth in intake, there were nearly 80 hectares of Cabernet Sauvignon and Shiraz planted in the region in 2003. Based on the current vineyard area, and using yield estimates of 9 t/ha for reds and 10 t/ha for whites, the estimated production from Coonawarra in 2009 is 50,000 tonnes. This means an approximate surplus of 7,000 tonnes of red varieties and 1,600 tonnes of whites compared with the 2009 preferred intake figures. While demand forecasts do change from year to year, this discrepancy may foreshadow some difficulties for growers without contracts in the future.

COONAWARRA CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 6.1

Current area in hectares by year planted

Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
CABERNET FRANC	41	0	0	0	0	0	41	0%
CABERNET SAUVIGNON	2555	311	113	65	55	51	3150	2%
MALBEC	18	0	0	0	0	0	18	0%
MERLOT	258	63	48	51	4	2	425	0%
NEBBIOLO	0	0	0	0	0	0	0	0%
PETIT VERDOT	6	14	0	3	1	0	25	0%
PINOT NOIR	42	5	0	0	0	0	47	0%
SANGIOVESE	0	0	0	0	0	0	0	0%
SHIRAZ	825	83	43	32	69	26	1079	2%
TEMPRANILLO	0	0	0	0	0	0	0	0%
OTHER RED	3	0	0	0	2	0	5	0%
TOTAL RED WINEGRAPES	**3750**	**476**	**204**	**151**	**131**	**79**	**4791**	**2%**
WHITE WINEGRAPES								
CHARDONNAY	350	9	0	12	27	0	398	0%
RIESLING	181	5	0	0	11	2	199	1%
SAUVIGNON BLANC	63	9	0	3	0	3	79	4%
SEMILLON	4	0	0	0	0	0	4	0%
TRAMINER	2	0	0	0	0	0	2	0%
VIOGNIER	0	1	0	0	0	2	3	62%
OTHER WHITE	2	0	0	0	0	0	2	0%
TOTAL WHITE WINEGRAPES	**602**	**25**	**0**	**16**	**38**	**7**	**687**	**1%**
TOTAL ALL VARIETIES	**4352**	**500**	**204**	**167**	**169**	**86**	**5477**	**2%**

COONAWARRA TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 6.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Cabernet Franc	**559**	**221**	**780**	**414**	28%	188%	12	5	13
Cabernet Sauvignon	**17320**	**18755**	**36076**	**25488**	52%	142%	20	25	36
Malbec	**112**	**0**	**112**	**84**	0%	133%	4	0	4
Merlot	**1998**	**2180**	**4178**	**3110**	52%	134%	16	13	24
Meunier	**23**	**5**	**28**	**26**	18%	107%	2	1	3
Petit Verdot	**18**	**182**	**200**	**157**	91%	128%	5	3	7
Pinot Noir	**294**	**704**	**998**	**611**	71%	163%	5	6	9
Ruby Cabernet	**7**	**0**	**7**	**0**	0%		1	0	0
Shiraz	**7278**	**4840**	**12118**	**11198**	40%	108%	20	11	27
Total RED	**27610**	**26888**	**54498**	**41088**	49%	133%			
WHITE									
Chardonnay	**3251**	**2232**	**5483**	**4242**	41%	129%	10	13	19
Other white	**11**	**0**	**11**	**0**	0%		1	0	0
Pedro Ximenes	**21**	**0**	**21**	**21**	0%	100%	1	0	1
Riesling	**1259**	**231**	**1490**	**1430**	16%	104%	6	4	9
Sauvignon Blanc	**494**	**527**	**1020**	**929**	52%	110%	6	6	11
Semillon	**35**	**37**	**72**	**49**	51%	146%	2	2	4
Traminer	**50**	**0**	**50**	**50**	0%	100%	1	0	1
Viognier	**0**	**6**	**6**	**15**	100%	40%	0	1	1
Total WHITE	**5120**	**3033**	**8153**	**6735**	37%	121%			
Total for region	**32730**	**29920**	**62651**	**47824**					

COONAWARRA CROP VALUE DATA - VINTAGE 2004

Table 6.3

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Cabernet Franc	**221**	**780**	$189,032	$666,360	$465	$1,534	**$854**	*100%*
Cabernet Sauvignon	**18755**	**36076**	$21,500,273	$41,355,629	$190	$2,500	**$1,146**	*100%*
Merlot	**2180**	**4178**	$2,075,343	$3,978,003	$300	$2,280	**$952**	*100%*
Meunier	**5**	**28**	$6,359	$34,825			**$1,228**	*100%*
Petit Verdot	**182**	**200**	$233,254	$256,686	$500	$1,529	**$1,280**	*100%*
Pinot Noir	**704**	**998**	$614,254	$870,999	$400	$1,300	**$873**	*100%*
Shiraz	**4840**	**12118**	$4,305,892	$10,780,736	$200	$1,941	**$890**	*100%*
Total RED	**26888**	**54379**	**$28,924,407**	**$57,943,237**				
WHITE								
Chardonnay	**2232**	**5483**	$3,229,168	$7,932,704	$850	$1,800	**$1,447**	*100%*
Riesling	**231**	**1490**	$231,067	$1,488,972	$850	$1,300	**$999**	*96%*
Sauvignon Blanc	**527**	**1020**	$678,464	$1,314,362	$900	$1,500	**$1,288**	*100%*
Semillon	**37**	**72**	$21,948	$43,044			**$600**	*100%*
Viognier	**6**	**6**	$10,800	$10,800			**$1,800**	*100%*
Total WHITE	**3033**	**8071**	**$4,171,447**	**$10,789,882**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
(3) This does not include end use bonuses or other adjustments determined post-receival.

COONAWARRA ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

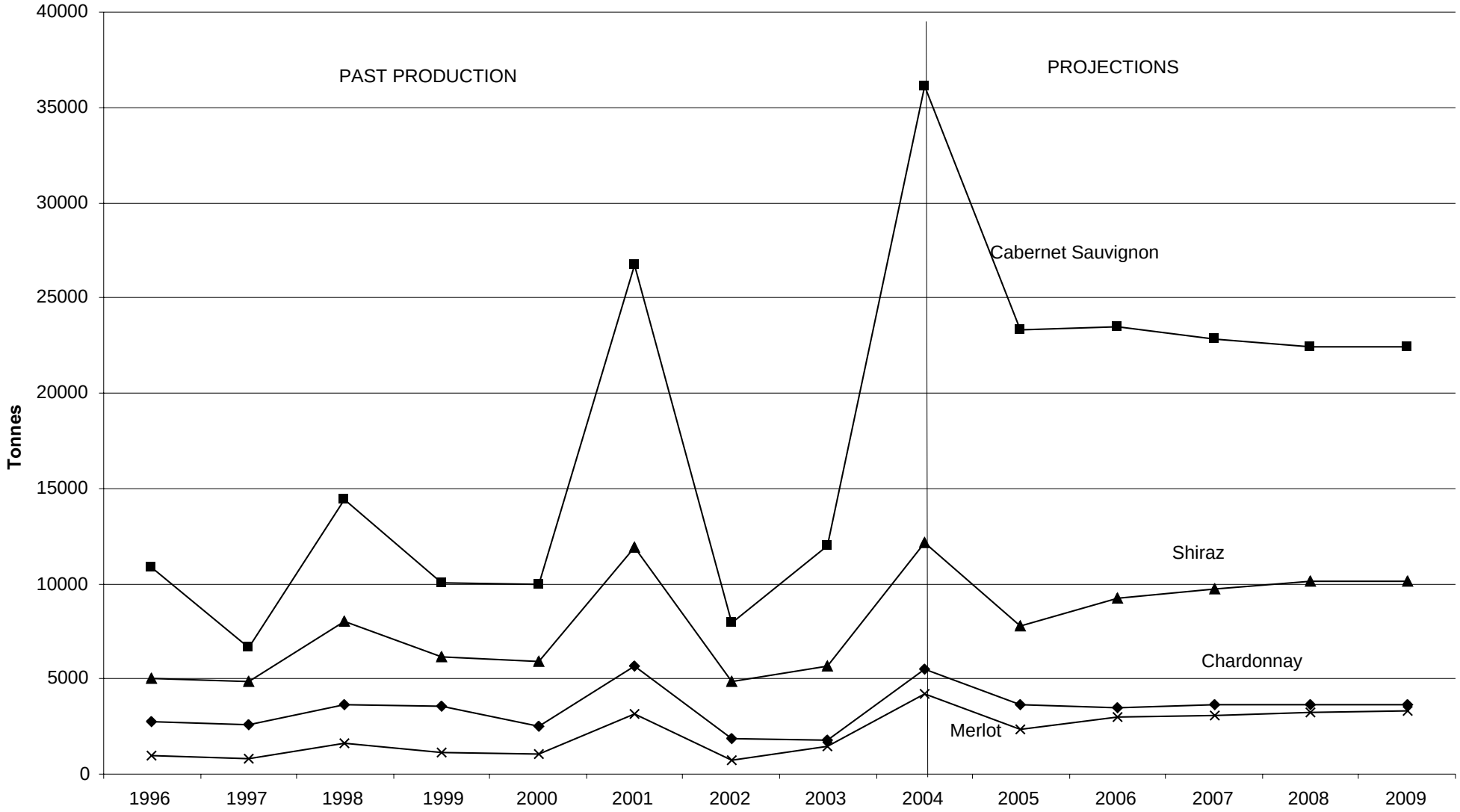
Table 6.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Franc	**444**	**403**	**420**	**393**	**420**	**393**	**420**	**393**	**420**	**393**
Cabernet Sauvignon	**23335**	**18665**	**23484**	**19260**	**22842**	**20368**	**22463**	**19970**	**22430**	**19970**
Malbec	**145**	**108**	**141**	**104**	**141**	**104**	**141**	**104**	**141**	**104**
Merlot	**2381**	**2110**	**2979**	**2791**	**3039**	**2899**	**3261**	**3133**	**3291**	**3183**
Meunier	**16**	**16**	**16**	**16**	**11**	**11**	**11**	**11**	**11**	**11**
Petit Verdot	**151**	**153**	**159**	**156**	**165**	**162**	**168**	**165**	**168**	**165**
Pinot Noir	**621**	**498**	**621**	**498**	**585**	**462**	**585**	**462**	**585**	**462**
Ruby Cabernet	**8**	**8**	**8**	**8**	**8**	**8**	**8**	**8**	**8**	**8**
Shiraz	**7776**	**7169**	**9212**	**8713**	**9705**	**9253**	**10102**	**9647**	**10142**	**9707**
Tempranillo	**2**	**0**	**2**	**0**	**2**	**0**	**2**	**0**	**2**	**0**
Total for RED	**34879**	**29129**	**37041**	**31938**	**36917**	**33659**	**37160**	**33892**	**37197**	**34002**
WHITE										
Chardonnay	**3641**	**3497**	**3499**	**3330**	**3609**	**3487**	**3622**	**3475**	**3637**	**3475**
Other white	**11**	**0**	**11**	**0**	**11**	**0**	**11**	**0**	**11**	**0**
Pedro Ximenes	**15**	**15**	**15**	**15**	**15**	**15**	**15**	**15**	**15**	**15**
Riesling	**1214**	**1254**	**1217**	**1257**	**1386**	**1362**	**1250**	**1203**	**1271**	**1208**
Sauvignon Blanc	**632**	**632**	**648**	**648**	**623**	**623**	**523**	**523**	**523**	**523**
Semillon	**31**	**31**	**31**	**31**	**21**	**21**	**21**	**21**	**21**	**21**
Traminer	**36**	**36**	**36**	**36**	**36**	**36**	**36**	**36**	**36**	**36**
Viognier	**15**	**15**	**15**	**15**	**17**	**17**	**20**	**20**	**20**	**20**
Total for WHITE	**5595**	**5480**	**5472**	**5332**	**5718**	**5561**	**5498**	**5293**	**5534**	**5298**
Total for region	**40474**	**34609**	**42513**	**37270**	**42635**	**39220**	**42658**	**39185**	**42731**	**39300**

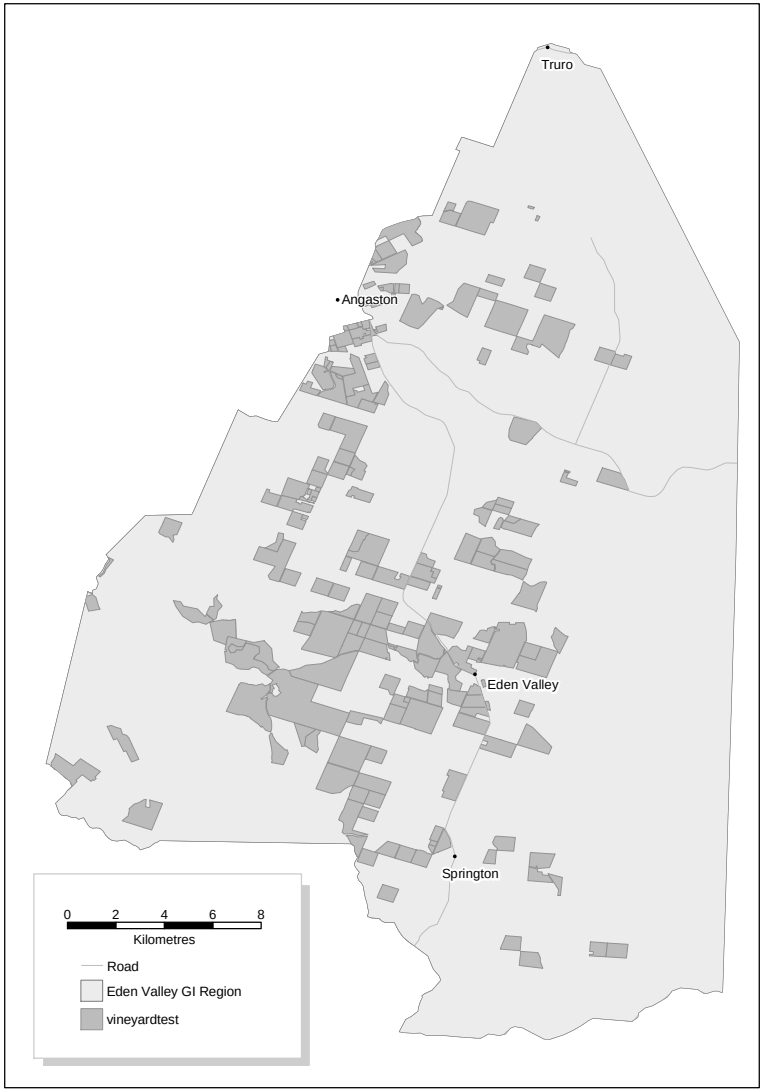
COONAWARRA PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1996 - 2009

Figure 6.1

Past production and projections (major varieties)



EDEN VALLEY VINTAGE OVERVIEW



Vintage report

The average winter rainfall this season was a welcome relief after last year's fourth worst drought in history. The soil profile was filled, as were most dams. A relatively frost free, wet, warm and thundery spring followed, which created a natural green house effect for the vines. They grew vigorously, flowered and, in general, set a large crop. December was the hottest for 10 years; however in January the weather became mild and windy, tempered by the cool southerlies off the ocean. January was unusually cool with similarities to January 2002. The heatwave in February caused some sunburn and crop losses. Fortunately, March returned the region to glorious sunny days and cold, dewy nights, with a couple of minor rain events, allowing the fruit to ripen under near perfect conditions. The vintage was almost as late as in 2002, due to the extended, dry and warm autumn period. Riesling looks particularly fine because of the cool ripening period in March.

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Overview of vintage statistics

Eden Valley produced 16,319 tonnes in 2004 – nearly double the 2003 harvest of 9,446. There were significant surpluses in all major varieties – even Riesling and Chardonnay.

There were big falls in the calculated average purchase value of the major red varieties, particularly Cabernet Sauvignon (down nearly $600 per tonnes) and Shiraz (down $400 per tonne). On the other hand, the average purchase value of Chardonnay actually increased slightly compared with 2003. Overall, income to growers increased substantially (up by more than 30%) because of the large tonnages.

The forecast is for a total intake of around 15,000 tonnes by 2009 (lower than this year's actual production) with estimated being higher than preferred intake in each year. This is a reverse of the forecasts given in 2003, which showed a shortfall in each year – made up particularly of Chardonnay and Riesling.

There was very little new planting in 2003 – 15 hectares of Riesling being the most significant. Based on the current vineyard area, and using yield estimates of 10 t/ha for reds and 11 t/ha for whites, the estimated production from Eden Valley in 2009 is approximately 23,000 tonnes. This means an approximate surplus of 6,000 tonnes of red varieties (more than 50%) and 2,000 tonnes of whites (25%) compared with the 2009 preferred intake figures. While demand forecasts do change from year to year, this discrepancy may foreshadow some difficulties for growers without contracts in the future.

EDEN VALLEY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 7.1

Variety	Current area in hectares by year planted							
	Pre-1999	*1999*	*2000*	*2001*	*2002*	*2003*	*Total*	*% planted in 2003*
RED WINEGRAPES								
CABERNET FRANC	6	0	0	0	1	0	7	0%
CABERNET SAUVIGNON	276	28	5	23	0	0	332	0%
GRENACHE	20	0	0	0	1	0	21	0%
MATARO (MOUVEDRE)	1	6	0	1	0	0	7	0%
MERLOT	58	19	1	4	1	0	83	0%
PETIT VERDOT	8	0	0	0	0	0	8	0%
PINOT NOIR	52	7	0	0	0	0	59	0%
SANGIOVESE	0	1	0	0	0	0	1	0%
SHIRAZ	491	99	7	12	20	1	628	0%
TEMPRANILLO	0	1	0	0	0	0	1	0%
OTHER RED	4	1	0	0	2	0	7	0%
TOTAL RED WINEGRAPES	**915**	**161**	**13**	**39**	**24**	**1**	**1153**	**0%**
WHITE WINEGRAPES								
CHARDONNAY	193	11	0	23	34	0	261	0%
CHENIN BLANC	1	0	0	0	0	0	1	0%
MUSCAT BLANC	5	0	0	0	0	0	5	0%
PINOT GRIS	5	3	1	2	5	3	18	14%
RIESLING	371	33	12	43	27	15	502	3%
SAUVIGNON BLANC	28	2	2	6	0	0	38	0%
SEMILLON	49	2	0	1	0	0	52	0%
TRAMINER	28	1	0	0	4	3	35	7%
VERDELHO	0	0	0	0	1	0	1	0%
VIOGNIER	12	2	8	6	0	1	30	3%
OTHER WHITE	4	0	0	0	0	0	4	0%
TOTAL WHITE WINEGRAPES	**695**	**54**	**22**	**82**	**70**	**22**	**946**	**2%**
TOTAL ALL VARIETIES	**1610**	**215**	**35**	**122**	**94**	**23**	**2099**	**1%**

Note: some increase in area in this region is a result of including previously unregistered growers with older plantings.

EDEN VALLEY TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 7.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Cabernet Franc	**19**	**21**	**40**	**31**	52%	128%	3	2	4
Cabernet Sauvignon	**1079**	**1094**	**2174**	**1323**	50%	164%	10	14	14
Grenache	**91**	**68**	**159**	**97**	43%	164%	4	5	6
Mataro (Mouvedre)	**0**	**81**	**82**	**82**	100%	99%	1	1	2
Merlot	**507**	**215**	**722**	**588**	30%	123%	9	8	10
Meunier	**42**	**0**	**42**	**42**	0%	99%	2	0	2
Other red	**0**	**0**	**0**	**0**	0%	100%	1	0	1
Petit Verdot	**89**	**0**	**89**	**50**	0%	178%	2	0	2
Pinot Noir	**286**	**363**	**649**	**664**	56%	98%	5	7	6
Sangiovese	**0**	**13**	**13**	**13**	100%	99%	0	1	1
Shiraz	**1254**	**2906**	**4159**	**3361**	70%	124%	9	17	19
Tempranillo	**6**	**0**	**6**	**0**	0%		1	0	0
Zinfandel	**6**	**0**	**6**	**6**	0%	100%	1	0	1
Total RED	**3380**	**4760**	**8140**	**6257**	58%	130%			
WHITE									
Chardonnay	**1356**	**1156**	**2513**	**1998**	46%	126%	11	12	17
Muscadelle (Tokay)	**0**	**20**	**20**	**20**	100%	100%	0	1	1
Muscat Blanc (Frontignac)	**19**	**21**	**40**	**42**	52%	94%	1	3	4
Other white	**10**	**0**	**10**	**10**	0%	100%	2	0	2
Pinot Gris	**70**	**12**	**81**	**103**	15%	79%	3	2	4
Riesling	**2488**	**1674**	**4162**	**3625**	40%	115%	10	14	19
Sauvignon Blanc	**305**	**84**	**389**	**501**	22%	78%	4	3	5
Semillon	**78**	**449**	**527**	**466**	85%	113%	2	8	6
Traminer	**119**	**106**	**225**	**214**	47%	106%	5	4	7
Viognier	**44**	**167**	**211**	**245**	79%	86%	2	2	4
Total WHITE	**4490**	**3689**	**8179**	**7224**	45%	113%			
Total for region	**7870**	**8449**	**16319**	**13481**					

EDEN VALLEY CROP VALUE DATA - VINTAGE 2004

Table 7.3

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Cabernet Franc	**21**	**40**	$29,176	$55,788			**$1,403**	*100%*
Cabernet Sauvignon	**1094**	**2174**	$1,162,174	$2,308,446	$200	$4,578	**$1,062**	*100%*
Grenache	**68**	**159**	$62,344	$146,512	$700	$1,500	**$922**	*100%*
Mataro (Mouvedre)	**81**	**82**	$93,587	$93,748			**$1,150**	*100%*
Merlot	**215**	**722**	$232,843	$782,833	$300	$1,450	**$1,085**	*100%*
Pinot Noir	**363**	**649**	$390,921	$699,379	$250	$1,980	**$1,078**	*100%*
Sangiovese	**13**	**13**	$12,846	$12,846			**$1,002**	*100%*
Shiraz	**2906**	**4159**	$4,173,001	$5,973,242	$200	$7,475	**$1,436**	*99%*
Total RED	**4760**	**7996**	**$6,156,892**	**$10,072,793**				
WHITE								
Chardonnay	**1156**	**2513**	$1,721,233	$3,740,140	$943	$1,800	**$1,488**	*100%*
Muscadelle (Tokay)	**20**	**20**	$7,168	$7,168			**$350**	*100%*
Muscat Blanc (Frontignac)	**21**	**40**	$14,539	$27,902	$500	$800	**$704**	*100%*
Pinot Gris	**12**	**81**	$15,788	$108,270			**$1,329**	*100%*
Riesling	**1674**	**4162**	$2,637,934	$6,559,898	$450	$2,300	**$1,576**	*100%*
Sauvignon Blanc	**84**	**389**	$116,152	$537,799	$1,100	$1,600	**$1,382**	*100%*
Semillon	**449**	**527**	$405,141	$476,040	$650	$1,400	**$903**	*100%*
Traminer	**106**	**225**	$115,620	$245,055	$600	$1,350	**$1,087**	*100%*
Viognier	**167**	**211**	$325,501	$411,374			**$1,947**	*100%*
Total WHITE	**3689**	**8169**	**$5,359,076**	**$12,113,646**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.

EDEN VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

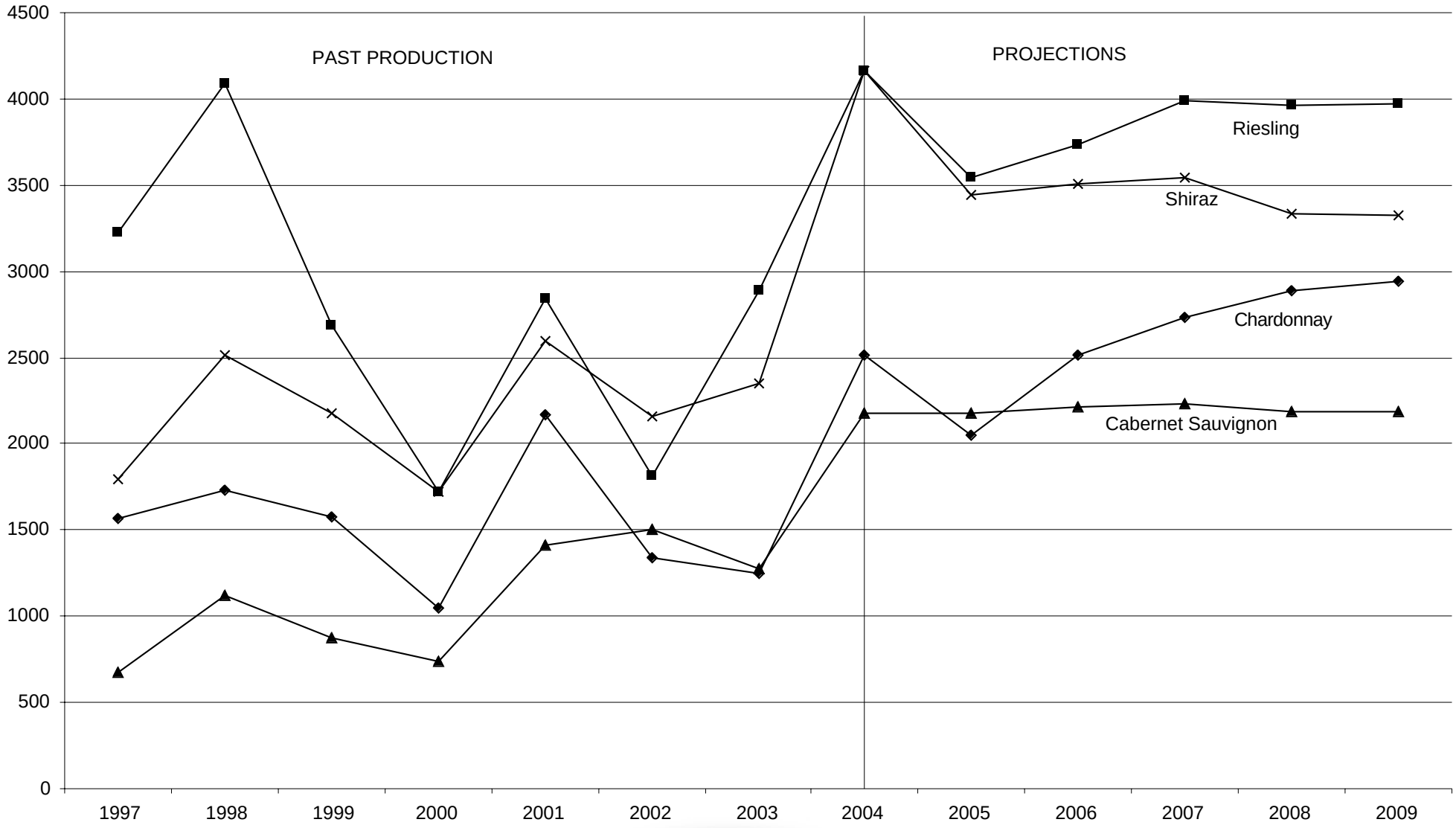
Table 7.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	0	0	1	0	1	0	1	0	1	1
Cabernet Franc	30	30	30	30	30	30	30	30	30	30
Cabernet Sauvignon	2178	1071	2211	1100	2231	1136	2182	1090	2182	1090
Grenache	133	83	116	73	118	73	114	71	116	71
Mataro (Mouvedre)	61	61	61	61	61	61	61	61	61	61
Merlot	592	517	693	563	703	583	682	562	713	583
Meunier	26	20	26	20	26	20	26	20	26	20
Muscat Rose	5	5	13	13	20	20	20	20	20	20
Nebbiolo	0	0	1	0	2	0	5	0	6	2
Other red	1	1	1	1	2	2	2	2	2	2
Petit Verdot	60	50	60	50	50	50	50	50	50	50
Pinot Noir	530	640	531	693	530	747	496	714	496	714
Sangiovese	8	8	8	8	8	8	8	8	8	8
Shiraz	3445	2858	3504	2924	3548	2998	3330	2779	3326	2780
Tempranillo	10	0	10	0	10	0	10	5	10	5
Zinfandel	6	6	6	6	6	6	6	6	6	6
Total for RED	7084	5349	7272	5542	7345	5733	7022	5417	7052	5442
WHITE										
Chardonnay	2048	1827	2510	2151	2732	2277	2889	2371	2940	2378
Muscadelle (Tokay)	25	25	25	25	25	25	25	25	25	25
Muscat Blanc	33	33	33	33	33	33	33	33	33	33
Other white	12	12	12	12	11	11	14	14	12	12
Pinot Gris	93	143	138	200	173	237	198	263	197	287
Riesling	3542	3653	3738	3859	3991	4183	3962	4022	3975	4034
Sauvignon Blanc	342	497	377	552	440	603	481	657	491	707
Semillon	403	408	403	408	409	408	381	388	377	388
Traminer	174	174	240	227	246	233	246	232	246	232
Viognier	226	241	259	270	272	285	273	285	273	285
Total for WHITE	6898	7013	7735	7737	8332	8295	8502	8290	8569	8381
Total for region	13982	12362	15007	13279	15677	14028	15524	13707	15621	13823

EDEN VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1997 - 2009

Figure 7.1

Past production and projections (major varieties)



Fleurieu zone (other)

FLEURIEU ZONE (OTHER) VINTAGE OVERVIEW

The Fleurieu zone (other) includes the GI regions Southern Fleurieu, Currency Creek and Kangaroo Island, as well as any other plantings in the zone that are outside the major regions of McLaren Vale and Langhorne Creek. Because of the small size of the GI regions, they are not reported separately. However, tonnage and forecast data are available for these regions on request from the Board.

The growing season for Currency Creek commenced with good soil moisture levels due to above average September rainfall, and irrigation did not commence until early December. Bud burst was even across all varieties - Chardonnay being a little earlier than average. Bunch numbers were above average per shoot and early bunch counts indicated higher yields on some varieties.

Cool December and January temperatures slowed shoot growth somewhat with an even flowering occurring. There was little disease pressure during the initial growing season.

February brought a heat wave, which had an impact on Chardonnay, Riesling and Sauvignon Blanc. Temperatures rose to 45 degrees on Valentine's Day! This really did affect those whites that had not been harvested at this point. From then on there were near perfect ripening conditions through March, April and May. The reds began to be harvested in early April and were completed mid May. There was little disease pressure at the finishing end of the season.

The yields were above average across most varieties; particularly Cabernet Sauvignon and Sauvignon Blanc. The quality of the whites that were not picked before the heat wave was no doubt affected by the heat; however the reds are looking sensational, with fantastic colour, strong varietal flavours and great depth.

In summary, it was a great vintage.

Philip Shaw
Ballast Stone Estate Wines

Overview of vintage statistics

The Fleurieu zone (other) is a rapidly growing area. It produced 10,426 tonnes in 2004 – nearly 50% more than in 2003, which in turn was 75% more than in 2002. This year there was a 24% surplus of red varieties, which was reflected in big decreases in the average purchase value of the major red varieties Cabernet Sauvignon and Shiraz (both down by $500 per tonne). The increased tonnages meant that income to growers from red varieties remained about the same, while income from whites more than doubled.

Intake of red varieties is forecast to remain at around the 2004 level, while intake of white varieties is expected to increase quite substantially, from 1,400 tonnes in 2004 to 5,300 tonnes in 2009.

Consistent with this forecast growth, there were 45 hectares of white varieties planted in 2003 (a 16% increase), and only 10 hectares (1%) of red varieties.

KANGAROO ISLAND GI REGION

FLEURIEU ZONE (OTHER) TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 8.1

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Cabernet Franc	**0**	**24**	**24**	**0**	100%		0	2	0
Cabernet Sauvignon	**1824**	**2008**	**3832**	**2511**	52%	153%	5	19	19
Grenache	**10**	**75**	**85**	**85**	88%	100%	1	1	2
Malbec	**0**	**0**	**0**	**0**	0%	100%	1	0	1
Merlot	**182**	**391**	**573**	**531**	68%	108%	4	6	9
Muscat Brown (Red Front)	**2**	**0**	**2**	**4**	0%	38%	1	0	1
Other red	**0**	**10**	**10**	**0**	100%		0	1	0
Petit Verdot	**7**	**7**	**14**	**40**	50%	35%	1	1	1
Pinot Noir	**30**	**119**	**149**	**141**	80%	106%	2	3	5
Sangiovese	**0**	**43**	**43**	**35**	100%	124%	0	1	1
Shiraz	**846**	**3437**	**4283**	**3925**	80%	109%	6	18	22
Tempranillo	**0**	**19**	**19**	**12**	100%	161%	0	1	1
Total RED	**2900**	**6134**	**9034**	**7284**	68%	124%			
WHITE									
Chardonnay	**108**	**341**	**449**	**530**	76%	85%	1	11	11
Pinot Gris	**0**	**34**	**34**	**26**	100%	134%	0	4	2
Riesling	**28**	**9**	**37**	**52**	24%	71%	2	1	4
Sauvignon Blanc	**228**	**269**	**497**	**400**	54%	124%	2	10	10
Semillon	**77**	**196**	**273**	**248**	72%	110%	3	6	7
Traminer	**0**	**15**	**15**	**15**	100%	100%	0	1	1
Verdelho	**0**	**47**	**47**	**0**	100%		0	2	0
Viognier	**20**	**20**	**40**	**45**	49%	89%	1	1	2
Total WHITE	**461**	**931**	**1392**	**1316**	67%	106%			
Total for region	**3361**	**7065**	**10426**	**8599**					

FLEURIEU ZONE (OTHER) CROP VALUE DATA - VINTAGE 2004

Table 8.2

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Cabernet Franc	**24**	**24**	$23,448	$23,448			**$979**	*100%*
Cabernet Sauvignon	**2008**	**3832**	$2,200,208	$4,198,185	$250	$1,695	**$1,096**	*100%*
Grenache	**75**	**85**	$75,380	$85,380			**$1,000**	*100%*
Merlot	**391**	**573**	$376,406	$551,215	$250	$1,457	**$963**	*100%*
Other red (group together)	**10**	**10**	$4,820	$4,820			**$482**	*100%*
Petit Verdot	**7**	**14**	$8,556	$17,112			**$1,222**	*100%*
Pinot Noir	**119**	**149**	$128,054	$160,121	$1,050	$1,100	**$1,078**	*100%*
Sangiovese	**43**	**43**	$51,926	$51,926			**$1,197**	*100%*
Shiraz	**3437**	**4283**	$4,427,280	$5,516,985	$300	$1,874	**$1,288**	*100%*
Tempranillo	**19**	**19**	$27,048	$27,048			**$1,400**	*100%*
Total RED	**6134**	**9033**	**$7,323,126**	**$10,636,241**				
WHITE								
Chardonnay	**341**	**449**	$465,758	$613,220	$600	$1,800	**$1,365**	*100%*
Pinot Gris	**34**	**34**	$37,958	$37,958	$900	$1,750	**$1,106**	*100%*
Riesling	**9**	**37**	$7,088	$29,488			**$800**	*100%*
Sauvignon Blanc	**269**	**497**	$346,537	$640,540	$600	$1,560	**$1,289**	*100%*
Semillon	**196**	**273**	$184,593	$257,317	$300	$1,200	**$942**	*100%*
Traminer	**15**	**15**	$16,852	$16,852			**$1,100**	*100%*
Verdelho	**47**	**47**	$41,500	$41,500			**$882**	*100%*
Viognier	**20**	**40**	$25,065	$50,773			**$1,285**	*100%*
Total WHITE	**931**	**1392**	**$1,125,351**	**$1,687,647**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
(3) This does not include end use bonuses or other adjustments determined post-receival.

FLEURIEU ZONE (OTHER) ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 8.3

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Franc	**8**	**0**	**8**	**0**	**8**	**0**	**8**	**0**	**8**	**0**
Cabernet Sauvignon	**4976**	**3572**	**4042**	**2763**	**3654**	**3105**	**3160**	**2361**	**3193**	**2443**
Grenache	**130**	**135**	**130**	**135**	**130**	**130**	**20**	**20**	**20**	**20**
Malbec	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Merlot	**1207**	**1193**	**845**	**780**	**925**	**889**	**968**	**882**	**1110**	**1023**
Muscat Brown	**3**	**4**	**4**	**4**	**4**	**4**	**4**	**4**	**4**	**4**
Other red	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Petit Verdot	**40**	**40**	**40**	**40**	**40**	**40**	**40**	**40**	**40**	**40**
Pinot Noir	**159**	**149**	**119**	**119**	**119**	**119**	**95**	**95**	**135**	**135**
Sangiovese	**40**	**24**	**40**	**24**	**40**	**24**	**40**	**24**	**40**	**24**
Shiraz	**5041**	**4826**	**4290**	**4010**	**4825**	**4845**	**4401**	**4441**	**4606**	**4776**
Tempranillo	**30**	**24**	**30**	**24**	**30**	**24**	**30**	**24**	**30**	**24**
Total for RED	**11634**	**9967**	**9547**	**7899**	**9774**	**9180**	**8765**	**7891**	**9185**	**8489**
WHITE										
Chardonnay	**1101**	**1161**	**1505**	**1525**	**2525**	**2575**	**3003**	**3053**	**3318**	**3368**
Pinot Gris	**6**	**6**	**6**	**6**	**6**	**6**	**6**	**6**	**6**	**6**
Riesling	**71**	**75**	**90**	**94**	**147**	**156**	**197**	**211**	**237**	**251**
Sauvignon Blanc	**603**	**582**	**512**	**471**	**684**	**693**	**843**	**782**	**934**	**873**
Semillon	**185**	**185**	**187**	**187**	**389**	**389**	**539**	**539**	**741**	**741**
Traminer	**84**	**84**	**84**	**84**	**84**	**84**	**0**	**0**	**0**	**0**
Verdelho	**40**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Viognier	**62**	**62**	**62**	**62**	**62**	**62**	**48**	**48**	**48**	**48**
Total for WHITE	**2152**	**2155**	**2446**	**2429**	**3897**	**3965**	**4636**	**4639**	**5284**	**5287**
Total for region	**13786**	**12122**	**11993**	**10328**	**13671**	**13145**	**13401**	**12530**	**14469**	**13776**

FLEURIEU ZONE (OTHER)* CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 8.4

	Current area in hectares by year planted							
Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
CABERNET SAUVIGNON	152	80	100	44	5	5	386	1%
GRENACHE	12	0	0	1	0	0	13	0%
MERLOT	43	4	17	29	0	0	93	0%
PETIT VERDOT	2	5	1	0	0	0	8	0%
PINOT NOIR	21	2	5	2	2	0	32	0%
SANGIOVESE	0	3	0	4	0	0	7	0%
SHIRAZ	255	41	31	27	22	6	381	1%
OTHER RED	5	0	0	8	2	0	15	0%
TOTAL RED WINEGRAPES	**490**	**135**	**154**	**115**	**30**	**10**	**935**	**1%**
WHITE WINEGRAPES								
CHARDONNAY	41	8	2	20	38	29	137	21%
PINOT GRIS	0	1	0	0	0	0	1	0%
RIESLING	6	0	6	1	6	4	23	19%
ROUSSANNE	0	0	0	1	0	0	1	0%
SAUVIGNON BLANC	35	3	1	11	7	7	64	11%
SEMILLON	26	0	4	1	0	0	30	0%
TRAMINER	0	0	6	0	0	0	6	0%
VERDELHO	4	0	0	1	0	0	6	0%
VIOGNIER	0	8	2	5	1	4	19	21%
TOTAL WHITE WINEGRAPES	**112**	**19**	**21**	**39**	**51**	**45**	**286**	**16%**
TOTAL ALL VARIETIES	**602**	**154**	**175**	**154**	**81**	**55**	**1221**	**4%**

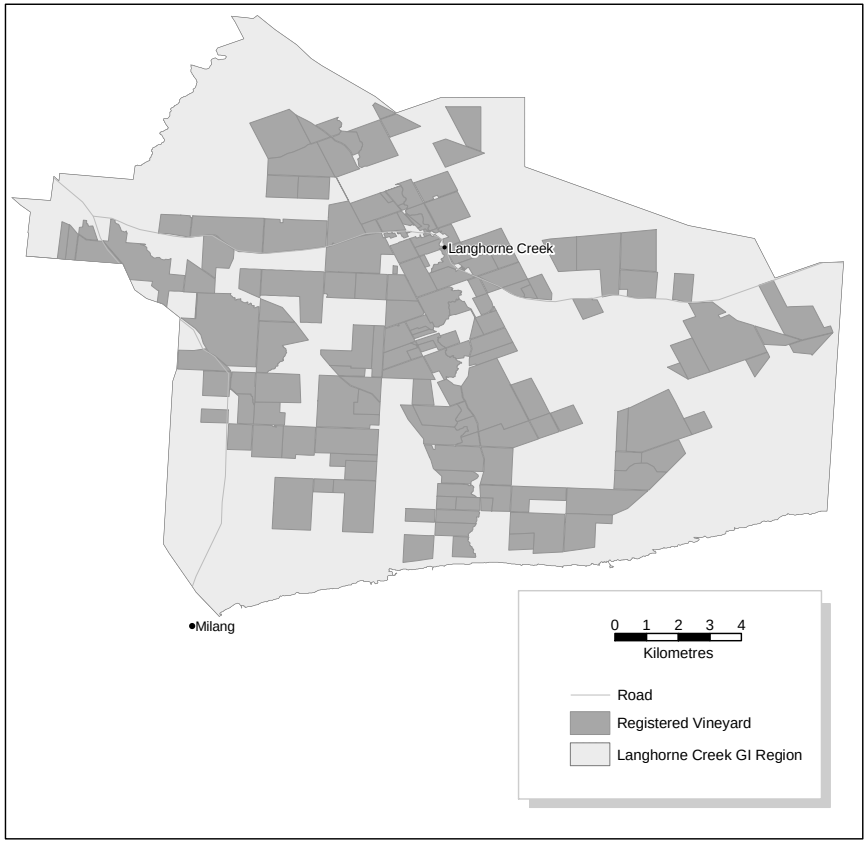
Includes Currency Creek (656ha); Southern Fleurieu (330ha); Kangaroo Island (104ha) and Fleurieu zone - other (131ha).

LANGHORNE CREEK VINTAGE OVERVIEW

Vintage report

The Langhorne Creek season started well for those on the flood plain, with two good flood events during the growing season. Some frost events occurred, followed later in the growing season by two extreme heat days, and this presented some challenges to the region, but otherwise it was a dry season with very low disease pressure.

Vintage started early and was constant with some reports of Shiraz and Cabernet Sauvignon intake overlapping and creating a little pressure on winery fermentation space.



Yields were a bit variable with above average yield for many on the flood plain and slightly below average in other areas. Yields look like averaging out to compare well with previous years.

Good, even ripening with good flavour development characterized the season. Flavour developed at a reasonable baume level with some reporting optimum fruit flavour at a slightly higher baume than in previous years. Acid levels have been quite low. Shiraz is again looking great with excellent fruit ripeness and depth of balance. A superb, quality vintage for Cabernet Sauvignon and parcels of Petit Verdot and Malbec. Cabernet Sauvignon in particular looks back to its best showing fabulous structure, colour – rich and black – and flavour. Chardonnay is reportedly the best in several years.

John Pargeter
Langhorne Creek Grapegrowers' Association

Overview of vintage statistics

Langhorne Creek had another record vintage in 2004, producing 54,360 tonnes. This region has shown steady growth from less than 10,000 tonnes in 1996. Despite this, record tonnages in the Barossa, McLaren Vale and Coonawarra meant that Langhorne Creek lost its position (from 2003) as the second largest producing region after the Riverland and dropped to fifth. There was still a shortfall in Chardonnay, but Shiraz and Cabernet Sauvignon were oversupplied compared with wineries' requirements.

Reflecting this result, the average purchase value of Shiraz and Cabernet Sauvignon was down by around $200 per tonne, while the average purchase value of Chardonnay increased very slightly.

The forecast is for intake of red varieties to grow to around 55,000 tonnes next year and remain at approximately that level. In last year's survey the reported demand for 2008 was 68,000 tonnes; this year that figure has been revised downward to 56,000 tonnes. On the other hand, forecast demand for white varieties has been revised upward by 3,000 tonnes in each forecast year. Overall the region is expected to grow to around 70,000 tonnes over the next five years.

Anticipated growth is reflected in the planting figures for the 2003 planting season. There were over 200 hectares (4%) planted; however, these were mainly in red varieties. Production estimates suggest that there is a further planting requirement of 300 hectares to meet intake requirements for 2009 in white varieties (see table 1.9).

LANGHORNE CREEK CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 9.1

Current area in hectares by year planted

Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
CABERNET FRANC	18	3	0	0	0	0	20	0%
CABERNET SAUVIGNON	1639	193	65	75	36	24	2032	1%
GRENACHE	37	43	45	1	0	0	126	0%
MALBEC	21	20	1	0	1	0	44	0%
MATARO (MOUVEDRE)	0	8	0	0	0	0	8	0%
MERLOT	315	43	0	0	59	20	436	5%
NEBBIOLO	1	8	0	1	0	0	10	0%
PETIT VERDOT	40	10	4	1	0	0	54	0%
PINOT NOIR	40	0	0	0	7	6	53	11%
SANGIOVESE	42	6	5	0	1	0	54	0%
SHIRAZ	1434	204	60	155	39	101	1992	5%
OTHER RED	2	13	10	5	0	1	31	3%
TOTAL RED WINEGRAPES	**3588**	**551**	**190**	**237**	**142**	**152**	**4860**	**3%**
WHITE WINEGRAPES								
CHARDONNAY	272	16	6	98	202	47	641	7%
RIESLING	20	30	0	66	22	0	138	0%
SEMILLON	26	2	0	0	0	0	29	0%
TRAMINER	1	0	0	15	0	0	16	0%
VERDELHO	41	6	6	0	0	0	53	0%
VIOGNIER	1	13	0	0	1	9	24	39%
OTHER WHITE	11	3	0	0	2	0	16	2%
TOTAL WHITE WINEGRAPES	**372**	**70**	**12**	**179**	**227**	**57**	**916**	**6%**
TOTAL ALL VARIETIES	**3960**	**620**	**202**	**416**	**369**	**209**	**5776**	**4%**

LANGHORNE CREEK TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 9.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Barbera	**0**	**4**	**4**	**15**	100%	29%	0	1	1
Cabernet Franc	**60**	**37**	**97**	**58**	38%	167%	3	2	3
Cabernet Sauvignon	**6404**	**13927**	**20331**	**18203**	69%	112%	13	22	28
Dolcetto	**0**	**39**	**39**	**35**	100%	110%	0	2	2
Grenache	**690**	**481**	**1171**	**1171**	41%	100%	7	3	7
Malbec	**75**	**128**	**204**	**364**	63%	56%	6	6	9
Mataro (Mouvedre)	**0**	**30**	**30**	**0**	100%		0	1	0
Merlot	**1312**	**1982**	**3295**	**3163**	60%	104%	10	13	16
Other red	**7**	**2**	**9**	**14**	35%	69%	1	1	2
Petit Verdot	**255**	**201**	**456**	**496**	44%	92%	9	4	11
Pinot Noir	**408**	**85**	**493**	**472**	17%	104%	3	2	4
Ruby Cabernet	**0**	**8**	**8**	**8**	100%	98%	0	1	1
Sangiovese	**39**	**298**	**337**	**219**	88%	154%	2	4	3
Shiraz	**5504**	**15262**	**20767**	**17995**	73%	115%	13	22	26
Touriga	**0**	**20**	**20**	**28**	100%	73%	0	1	1
Total RED	**14755**	**32505**	**47260**	**42242**	69%	112%			
WHITE									
Chardonnay	**2050**	**2606**	**4657**	**6539**	56%	71%	5	10	11
Chenin Blanc	**22**	**0**	**22**	**22**	0%	100%	1	0	1
Doradillo	**0**	**12**	**12**	**12**	100%	100%	0	1	1
Other white	**8**	**9**	**17**	**8**	0%	100%	1	0	1
Pinot Gris	**0**	**26**	**26**	**36**	100%	72%	0	2	2
Riesling	**1266**	**47**	**1313**	**1318**	4%	100%	3	3	4
Sauvignon Blanc	**8**	**43**	**51**	**74**	84%	69%	1	2	3
Semillon	**0**	**341**	**341**	**346**	100%	99%	0	2	3
Traminer	**0**	**97**	**97**	**97**	100%	100%	0	1	1
Verdelho	**147**	**343**	**491**	**515**	70%	95%	3	5	7
Viognier	**36**	**38**	**74**	**113**	52%	65%	3	3	6
Total WHITE	**3537**	**3563**	**7100**	**9080**	50%	78%			
Total for region	**18292**	**36068**	**54360**	**51322**					

LANGHORNE CREEK CROP VALUE DATA - VINTAGE 2004

Table 9.3

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Barbera	**4**	**4**	$6,188	$6,188			**$1,400**	*100%*
Cabernet Franc	**37**	**97**	$25,612	$66,791			**$690**	*100%*
Cabernet Sauvignon	**13927**	**20331**	$15,607,102	$22,783,962	$200	$2,300	**$1,121**	*99%*
Dolcetto	**39**	**39**	$58,060	$58,060			**$1,508**	*100%*
Grenache	**481**	**1171**	$541,317	$1,317,014	$400	$1,260	**$1,125**	*100%*
Malbec	**128**	**204**	$139,013	$220,566	$500	$1,650	**$1,083**	*100%*
Mataro (Mouvedre)	**30**	**30**	$33,418	$33,418			**$1,099**	*100%*
Merlot	**1982**	**3295**	$2,092,580	$3,477,939	$348	$1,772	**$1,056**	*100%*
Other red (group together)	**2**	**6**	$3,080	$8,680			**$1,400**	*100%*
Petit Verdot	**201**	**456**	$214,434	$487,009	$900	$1,950	**$1,067**	*100%*
Pinot Noir	**85**	**493**	$78,522	$456,852			**$927**	*100%*
Ruby Cabernet	**8**	**8**	$6,630	$6,630			**$850**	*100%*
Sangiovese	**298**	**337**	$449,436	$508,505	$500	$1,772	**$1,508**	*100%*
Shiraz	**15262**	**20767**	$18,689,645	$25,429,750	$489	$2,300	**$1,225**	*99%*
Touriga	**20**	**20**	$24,372	$24,372			**$1,200**	*100%*
Total RED	**32505**	**47257**	**$37,969,409**	**$54,885,736**				
WHITE								
Chardonnay	**2606**	**4657**	$3,566,208	$6,372,156	$1,100	$1,700	**$1,368**	*100%*
Doradillo	**12**	**12**	$2,109	$2,109			**$176**	*100%*
Palomino	**9**	**9**	$2,601	$2,601			**$289**	*100%*
Pinot Gris	**26**	**26**	$33,075	$33,075			**$1,279**	*100%*
Riesling	**47**	**1313**	$38,736	$1,081,883	$200	$1,150	**$824**	*100%*
Sauvignon Blanc	**43**	**51**	$46,877	$55,527			**$1,081**	*100%*
Semillon	**341**	**341**	$275,030	$275,030			**$805**	*100%*
Traminer	**97**	**97**	$77,280	$77,280			**$800**	*100%*
Verdelho	**343**	**491**	$398,958	$570,092	$850	$1,460	**$1,162**	*100%*
Viognier	**38**	**74**	$61,338	$118,663	$1,575	$1,700	**$1,612**	*100%*
Total WHITE	**3563**	**7070**	**$4,502,212**	**$8,588,415**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.

LANGHORNE CREEK ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

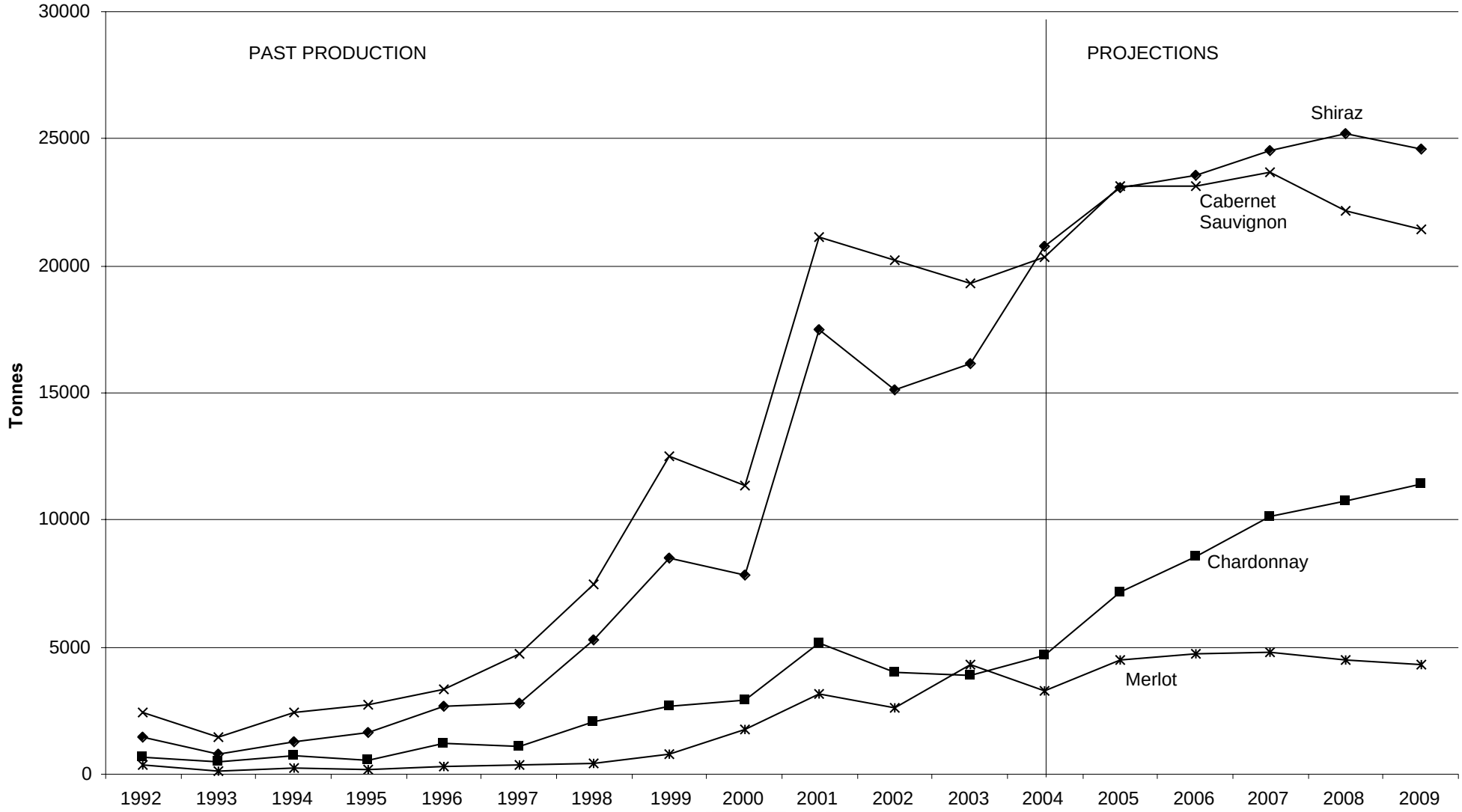
Table 9.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	15	15	17	17	20	20	24	24	27	27
Cabernet Franc	93	44	93	44	93	44	44	44	44	44
Cabernet Sauvignon	23156	20629	23111	20818	23678	23142	22136	22691	21464	22735
Dolcetto	55	55	60	60	65	65	70	70	75	75
Grenache	1504	1494	1507	1497	1472	1517	1470	1527	1495	1761
Malbec	479	405	505	415	516	427	510	421	530	441
Mataro (Mouvedre)	15	15	15	15	25	25	60	60	100	100
Merlot	4483	4154	4715	4219	4820	4633	4488	4598	4337	4627
Nebbiolo	24	24	24	24	24	24	24	24	24	24
Other red	54	54	59	59	69	69	79	79	89	89
Petit Verdot	502	494	537	499	567	524	503	470	503	470
Pinot Noir	606	571	588	553	612	577	648	613	648	613
Sangiovese	555	294	570	294	570	294	310	294	310	294
Shiraz	23091	20224	23567	21493	24518	23438	25196	24758	24587	25269
Tempranillo	16	16	20	20	25	25	30	30	35	35
Touriga	52	52	60	60	60	60	0	0	0	0
Total for RED	54700	48539	55447	50086	57134	54882	55592	55702	54267	56603
WHITE										
Chardonnay	7173	8731	8541	10096	10114	11619	10737	11968	11420	12186
Chenin Blanc	22	22	22	22	22	22	22	22	22	22
Doradillo	7	0	7	0	7	0	7	0	7	0
Other white	23	8	23	8	23	8	23	8	23	8
Pinot Gris	40	56	65	111	75	116	80	121	85	126
Riesling	1535	1535	1968	1968	2203	1894	2203	1903	2203	1913
Sauvignon Blanc	83	83	70	70	80	80	90	90	130	130
Semillon	335	335	335	335	335	335	335	335	335	335
Traminer	126	126	162	162	162	162	0	0	0	0
Verdelho	665	665	690	690	715	715	622	622	622	622
Viognier	182	210	234	250	279	295	369	425	419	475
Total for WHITE	10191	11771	12117	13712	14015	15246	14488	15494	15266	15817
Total for region	64891	60310	67564	63798	71149	70128	70080	71196	69533	72420

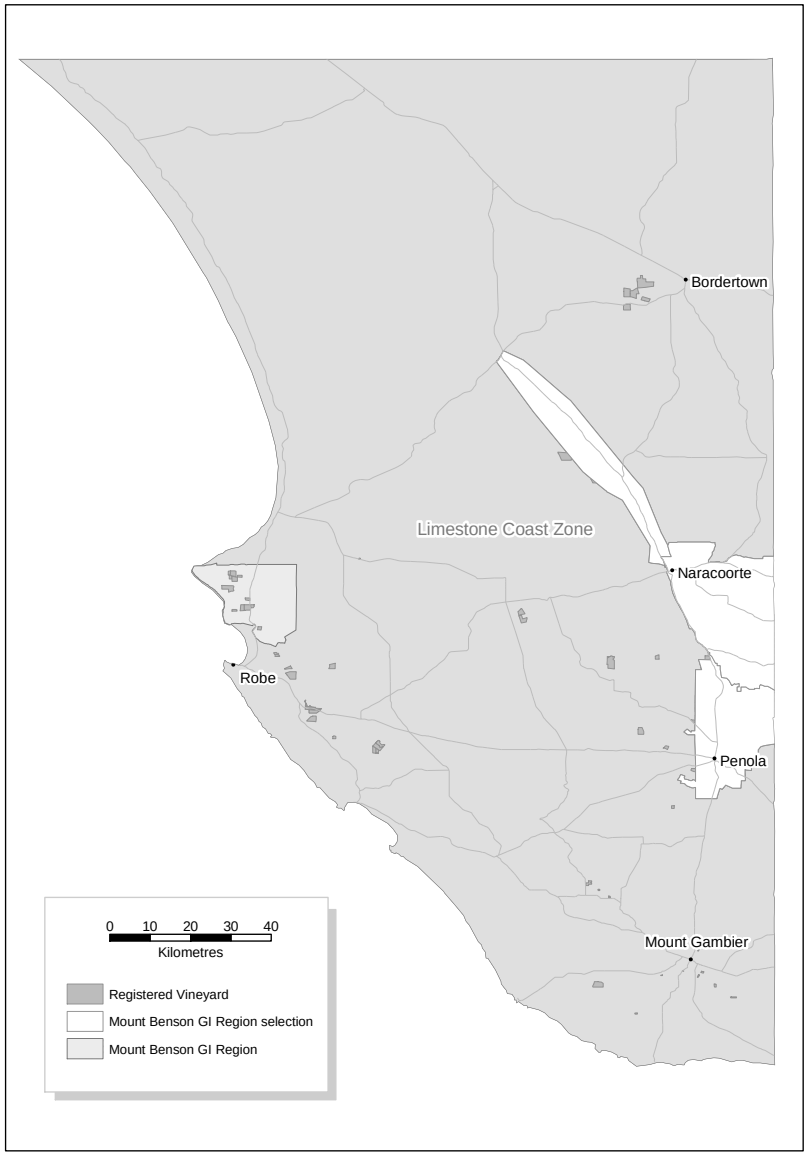
LANGHORNE CREEK PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1992 - 2009

Figure 9.1

Past production and projections (major varieties)



LIMESTONE COAST ZONE (OTHER) VINTAGE OVERVIEW



Overview of vintage statistics

Limestone Coast (other) includes the plantings around Bordertown, Mt Benson, Robe, Lucindale, Beachport, Mount Gambier and plantings near but outside the declared GI regions of Padthaway, Coonawarra and Wrattonbully.

The area accounts for a total of 2881 hectares, and produced 30,183 tonnes in the 2004 vintage. This was double the crush of 2003. There was a substantial surplus in red varieties, with Merlot and Shiraz in particular being around twice the wineries' preferred intake. There was also a surplus of white varieties; however, white varieties only make up 17% of the production of the region.

Projections indicate that intake of red varieties will be around 20,000 tonnes over the next five years (less than the 2004 vintage), and there will be a 100% surplus in each year (ie twice as much as wineries' preferred intake) - mainly in Shiraz. White varieties are expected to grow from 4,000 tonnes in 2005 to around 4,400 tonnes in 2009 and to exceed demand in each forecast year.

There was very little new planting in the Limestone Coast zone (other) in 2003, in line with the lack of forecast growth for this area.

Note: crop value data is not presented in this report for Limestone Coast zone (other) as this is not a single, uniform region. However, the information is available on the Board's website at www.phylloxera.com.au or on request from the office.

LIMESTONE COAST ZONE (OTHER) CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 10.1

Current area in hectares by year planted

Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
MOUNT BENSON								
SHIRAZ	63	14	28	30	23	0	158	0%
CABERNET SAUVIGNON	88	21	4	11	4	0	127	0%
MERLOT	14	11	5	15	5	0	50	0%
CHARDONNAY	23	8	0	8	2	5	45	10%
SAUVIGNON BLANC	10	4	12	8	4	3	41	7%
OTHER VARIETIES (<5ha each)	10	10	6	9	6	0	41	0%
TOTAL ALL VARIETIES	**208**	**68**	**54**	**80**	**45**	**8**	**463**	**2%**
BORDERTOWN								
CABERNET SAUVIGNON	191	181	5	53	0	0	430	0%
SHIRAZ	129	147	17	14	0	0	307	0%
MERLOT	88	98	48	0	12	0	245	0%
CHARDONNAY	77	0	0	0	23	0	100	0%
PETIT VERDOT	17	24	5	0	0	0	46	0%
MATARO (MOUVEDRE)	0	24	19	0	0	0	42	0%
CABERNET FRANC	0	19	0	10	0	0	29	0%
MALBEC	0	10	9	5	0	0	24	0%
VERDELHO	6	0	5	0	0	0	10	0%
SEMILLON	10	0	0	0	0	0	10	0%
OTHER VARIETIES (<5ha each)	3	2	0	0	1	2	8	20%
TOTAL ALL VARIETIES	**520**	**506**	**107**	**81**	**36**	**2**	**1252**	**0%**
LIMESTONE COAST ZONE - OTHER								
CABERNET SAUVIGNON	440	7	3	7	13	0	470	0%
SHIRAZ	210	3	7	11	10	0	241	0%
CHARDONNAY	157	1	0	9	1	0	169	0%
PINOT NOIR	101	8	27	3	0	0	138	0%
MERLOT	80	1	1	4	4	0	91	0%
SAUVIGNON BLANC	17	0	1	4	0	0	21	0%
SEMILLON	17	0	0	0	0	0	17	0%
PETIT VERDOT	9	0	2	0	0	0	11	0%
OTHER VARIETIES (<5ha each)	3	0	1	4	0	0	8	1%
TOTAL ALL VARIETIES	**1034**	**19**	**43**	**42**	**28**	**0**	**1166**	**0%**

LIMESTONE COAST ZONE (OTHER) TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 10.2

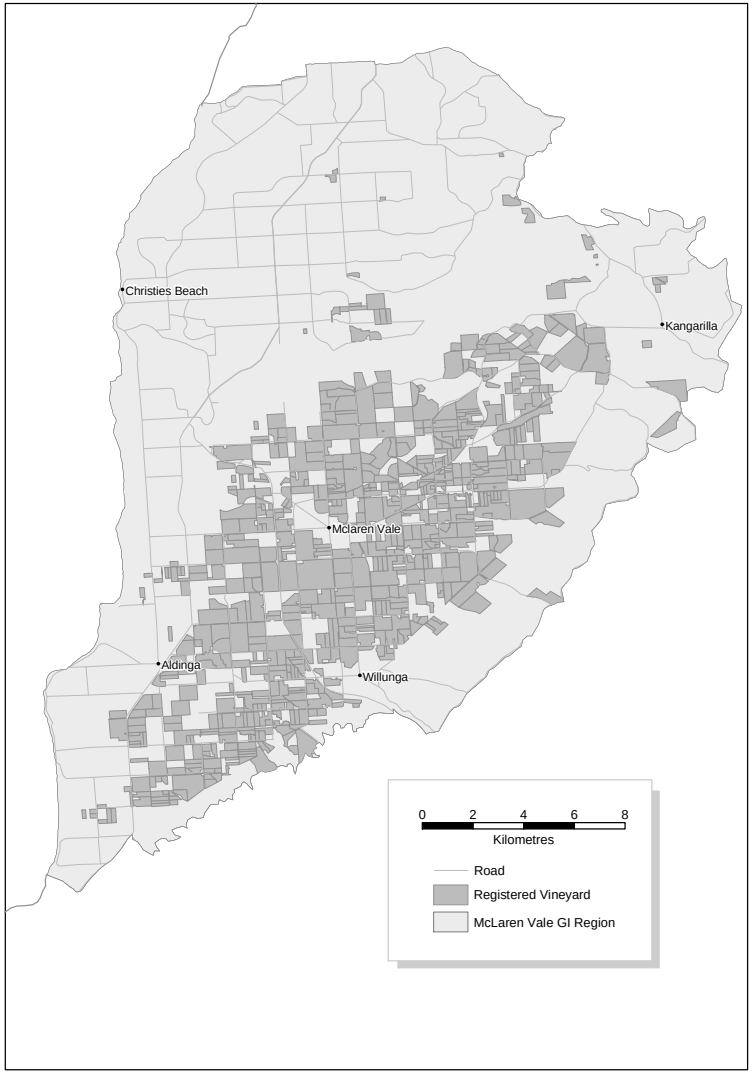
Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Cabernet Franc	**26**	**458**	**484**	**26**	95%	1839%	2	1	2
Cabernet Sauvignon	**3913**	**5537**	**9450**	**5958**	59%	159%	10	20	18
Grenache	**13**	**0**	**13**	**13**	0%	100%	1	0	1
Malbec	**0**	**318**	**318**	**224**	100%	142%	0	2	1
Mataro (Mouvedre)	**0**	**822**	**822**	**0**	100%		0	1	0
Merlot	**797**	**2928**	**3725**	**1567**	79%	238%	6	14	12
Petit Verdot	**116**	**950**	**1066**	**158**	89%	674%	5	3	7
Pinot Noir	**512**	**763**	**1275**	**1216**	60%	105%	4	10	9
Shiraz	**1529**	**6039**	**7568**	**3890**	80%	195%	8	15	15
Tempranillo	**14**	**0**	**14**	**14**	0%	100%	1	0	1
Total RED	**6919**	**17814**	**24734**	**13067**	72%	189%			
WHITE									
Chardonnay	**2137**	**1837**	**3974**	**3129**	46%	127%	7	12	14
Pinot Gris	**28**	**20**	**48**	**52**	42%	94%	1	3	3
Riesling	**5**	**0**	**5**	**5**	0%	100%	1	0	1
Sauvignon Blanc	**225**	**363**	**588**	**615**	62%	96%	4	9	10
Semillon	**358**	**337**	**695**	**696**	49%	100%	3	3	5
Verdelho	**58**	**69**	**127**	**102**	54%	125%	1	3	4
Viognier	**0**	**13**	**13**	**22**	100%	59%	0	2	2
Total WHITE	**2811**	**2639**	**5450**	**4620**	48%	118%			
Total for region	**9730**	**20453**	**30183**	**17687**					

LIMESTONE COAST (OTHER) ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 10.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Franc	**424**	**20**	**425**	**21**	**425**	**21**	**425**	**21**	**425**	**21**
Cabernet Sauvignon	**6981**	**5134**	**6339**	**4595**	**6219**	**4475**	**6119**	**4375**	**6159**	**4415**
Grenache	**16**	**16**	**19**	**19**	**19**	**19**	**19**	**19**	**19**	**19**
Malbec	**200**	**0**	**200**	**0**	**200**	**0**	**200**	**0**	**200**	**0**
Mataro (Mouvedre)	**800**	**0**	**800**	**0**	**800**	**0**	**800**	**0**	**800**	**0**
Merlot	**3553**	**1429**	**3369**	**1245**	**3344**	**1260**	**3294**	**1210**	**3294**	**1210**
Petit Verdot	**1053**	**153**	**1036**	**136**	**1036**	**136**	**1036**	**136**	**1036**	**136**
Pinot Noir	**498**	**567**	**397**	**460**	**388**	**458**	**388**	**445**	**388**	**445**
Shiraz	**7386**	**3595**	**6889**	**3266**	**6869**	**3246**	**6829**	**2706**	**6929**	**2806**
Tempranillo	**16**	**16**	**16**	**16**	**16**	**16**	**16**	**16**	**16**	**16**
Total for RED	**20927**	**10930**	**19490**	**9758**	**19316**	**9631**	**19126**	**8928**	**19266**	**9068**
WHITE										
Chardonnay	**2883**	**2084**	**2906**	**2103**	**2960**	**2157**	**2835**	**2027**	**2885**	**2077**
Pinot Gris	**56**	**56**	**60**	**60**	**60**	**60**	**60**	**60**	**60**	**60**
Riesling	**6**	**6**	**8**	**8**	**8**	**8**	**8**	**8**	**8**	**8**
Sauvignon Blanc	**526**	**597**	**616**	**668**	**686**	**688**	**726**	**728**	**786**	**788**
Semillon	**307**	**322**	**356**	**356**	**272**	**272**	**322**	**322**	**372**	**372**
Verdelho	**171**	**165**	**201**	**195**	**251**	**245**	**301**	**295**	**351**	**345**
Viognier	**29**	**29**	**29**	**29**	**29**	**29**	**29**	**29**	**29**	**29**
Total for WHITE	**3978**	**3259**	**4176**	**3419**	**4266**	**3459**	**4281**	**3469**	**4491**	**3679**
Total for region	**24905**	**14189**	**23666**	**13177**	**23582**	**13090**	**23407**	**12397**	**23757**	**12747**

MCLAREN VALE VINTAGE OVERVIEW



Vintage report

2004 was a longer than usual vintage, attributed to cool conditions during ripening. It is expected that this will produce quality wines across both red and white wine styles.

Good winter and spring rainfall ensured good even budburst and enabled growers to maintain adequate soil moisture to ensure healthy grapevine canopies from veraison though to harvest, contributing to optimum flavour development. A warm dry November saw a rapid flowering period, which was followed by good berry set, and a quick even veraison. The coolest January in 12 years, followed by above average temperatures in February and dry conditions leading into harvest, optimised fruit flavours, sugar and acid levels. Despite two days in February above 44°C, shrivel and sunburn was minimal due to good canopies filtering the damaging effects of direct sunlight. As a result fruit condition at harvest was excellent.

Crop levels were up on previous seasons with a combination of good fruitfulness and many younger vineyards coming into full production, contributing to an increased yield. Despite this, the long ripening season took the pressure off fruit intake allowing wineries to schedule harvest when flavours and baume were at an optimum.

Winemakers' comments centred on sensational Cabernet Sauvignons and top end Shiraz attributed to fruit reaching full flavour ripeness, excellent colour, and tannin with wines exhibiting great varietal flavours and aromas. Overall the quality of white varieties impressed, with fruit harvested at lower baumes producing fantastic wines.

Lucy Hyde, Viticulture Officer
McLaren Vale Grape Wine and Tourism

Overview of vintage statistics

McLaren Vale produced a record 71,515 tonnes in 2004, making it the second largest producing region in the state after the Riverland, for only the second time. There was an 8,000 tonne surplus of red varieties – mainly Cabernet Sauvignon – while white varieties (less than 14,000 tonnes in total) were in balance.

The calculated average purchase value of the major red varieties dropped by around $300 per tonne; however the income to growers from red varieties increased by 30% because of the increased tonnage. In white varieties, total income was up by 50%. The total value of grapes from the region increased from $70 million in 2003 to $98 million.

The forecast is for intake to stabilise at around 65,000 tonnes (below this year's crush), with a small shortfall in red varieties by 2009. Shiraz is set to remain by far the most important variety for the region, accounting for around 50% of the total intake.

There were 38 hectares of Shiraz and 37 hectares of Chardonnay planted in the region in 2003. Production estimates based on the current vineyard area and using yield estimates of 10 t/ha for reds and 11 t/ha for whites show a shortfall of nearly 3,000 tonnes between preferred intake of white varieties and potential production. On the other hand, there is an estimated surplus of 4,500 tonnes of red varieties. While demand forecasts change from year to year, this discrepancy may foreshadow some problems for growers without a contract in future years.

MCLAREN VALE CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 11.1 **Current area in hectares by year planted**

Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
BARBERA	1	2	4	0	0	0	7	0%
CABERNET FRANC	27	3	1	0	0	0	31	0%
CABERNET SAUVIGNON	1055	170	27	48	18	5	1322	0%
GRENACHE	345	36	11	6	2	1	401	0%
MALBEC	9	0	0	0	0	0	9	0%
MATARO (MOUVEDRE)	11	1	3	2	3	0	21	0%
MERLOT	233	55	16	7	10	0	321	0%
NEBBIOLO	2	6	0	0	0	0	9	0%
PETIT VERDOT	27	15	14	13	0	2	71	3%
PINOT NOIR	79	7	0	0	0	0	86	0%
RUBY CABERNET	3	0	0	0	0	0	3	0%
SANGIOVESE	7	26	4	2	0	1	39	2%
SHIRAZ	2122	451	194	234	115	38	3154	1%
TEMPRANILLO	2	9	2	7	1	1	22	3%
OTHER RED	6	0	4	2	0	1	14	8%
TOTAL RED WINEGRAPES	**3927**	**782**	**278**	**322**	**150**	**49**	**5508**	**1%**
WHITE WINEGRAPES								
CHARDONNAY	602	4	0	17	30	37	690	5%
CHENIN BLANC	20	0	0	0	4	0	23	0%
MARSANNE	12	0	0	1	0	0	14	0%
RIESLING	83	0	0	3	0	0	86	0%
ROUSSANNE	8	0	0	2	0	0	9	0%
SAUVIGNON BLANC	102	0	1	2	3	7	114	6%
SEMILLON	132	0	0	1	0	0	133	0%
VERDELHO	14	3	5	0	0	0	21	0%
VIOGNIER	24	1	7	4	2	2	39	5%
OTHER WHITE	10	0	0	0	2	0	12	0%
TOTAL WHITE WINEGRAPES	**1007**	**8**	**12**	**30**	**40**	**45**	**1142**	**4%**
ROOTSTOCK BLOCK	1	3	0	0	0	0	4	0%
TOTAL ALL VARIETIES	**4936**	**793**	**291**	**351**	**190**	**94**	**6654**	**1%**

MCLAREN VALE TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 11.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Barbera	**35**	**0**	**35**	**36**	0%	96%	4	0	4
Cabernet Franc	**54**	**298**	**352**	**187**	85%	188%	5	10	10
Cabernet Sauvignon	**3845**	**9978**	**13823**	**10559**	72%	131%	35	36	49
Grenache	**1285**	**2425**	**3709**	**3495**	65%	106%	17	23	31
Malbec	**64**	**6**	**69**	**66**	8%	105%	3	2	5
Mataro (Mouvedre)	**167**	**22**	**190**	**271**	12%	70%	5	4	7
Merlot	**1106**	**1971**	**3077**	**2638**	64%	117%	21	22	32
Nebbiolo	**68**	**9**	**77**	**70**	11%	109%	4	1	5
Other red	**91**	**20**	**112**	**152**	9%	53%	4	1	6
Petit Verdot	**252**	**357**	**609**	**437**	59%	139%	7	9	10
Pinot Noir	**138**	**1113**	**1252**	**1330**	89%	94%	5	7	8
Sangiovese	**244**	**90**	**334**	**294**	27%	114%	8	6	10
Shiraz	**8248**	**25518**	**33767**	**29798**	76%	113%	34	47	57
Tempranillo	**123**	**29**	**153**	**136**	19%	112%	5	5	7
Zinfandel	**3**	**11**	**14**	**20**	78%	70%	1	1	1
Total RED	**15724**	**41848**	**57571**	**49487**	73%	116%			
WHITE									
Chardonnay	**2024**	**5717**	**7741**	**7446**	74%	104%	26	26	38
Chenin Blanc	**128**	**247**	**375**	**341**	66%	110%	2	7	6
Marsanne	**56**	**106**	**162**	**153**	65%	106%	2	1	2
Other white	**14**	**31**	**45**	**66**	23%	78%	1	1	2
Pedro Ximenes	**35**	**13**	**48**	**48**	27%	100%	1	1	2
Riesling	**333**	**633**	**966**	**968**	66%	100%	9	9	12
Roussanne	**49**	**0**	**49**	**104**	0%	48%	2	0	2
Sauvignon Blanc	**625**	**870**	**1495**	**1479**	58%	101%	16	14	24
Semillon	**376**	**2080**	**2456**	**2220**	85%	111%	10	15	21
Traminer	**0**	**38**	**38**	**37**	100%	101%	0	2	2
Verdelho	**138**	**87**	**225**	**249**	39%	90%	5	2	6
Viognier	**109**	**235**	**343**	**337**	68%	102%	5	5	7
Total WHITE	**3888**	**10055**	**13943**	**13447**	72%	104%			
Total for region	**19612**	**51903**	**71515**	**62935**					

MCLAREN VALE CROP VALUE DATA - VINTAGE 2004

Table 11.3

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Cabernet Franc	**298**	**352**	$263,498	$311,678	$300	$1,660	**$885**	*100%*
Cabernet Sauvignon	**9978**	**13823**	$12,944,024	$17,931,554	$200	$3,934	**$1,297**	*97%*
Cinsaut	**17**	**17**	$10,212	$10,212			**$600**	*100%*
Grenache	**2425**	**3709**	$3,064,287	$4,687,814	$300	$3,000	**$1,264**	*97%*
Malbec	**6**	**69**	$9,794	$122,566			**$1,762**	*100%*
Mataro (Mouvedre)	**22**	**190**	$33,196	$281,598	$1,150	$2,250	**$1,485**	*100%*
Merlot	**1971**	**3077**	$2,421,891	$3,780,746	$481	$2,863	**$1,229**	*95%*
Nebbiolo	**9**	**77**	$11,900	$107,156			**$1,400**	*100%*
Other red	**3**	**40**	$6,840	$79,867			**$2,012**	*100%*
Petit Verdot	**357**	**609**	$446,774	$762,816	$650	$1,675	**$1,253**	*100%*
Pinot Noir	**1113**	**1252**	$1,172,567	$1,318,334	$300	$1,500	**$1,053**	*100%*
Sangiovese	**90**	**334**	$118,901	$439,192	$900	$1,500	**$1,315**	*91%*
Shiraz	**25518**	**33767**	$37,971,147	$50,244,682	$350	$3,900	**$1,488**	*97%*
Tempranillo	**29**	**153**	$44,529	$231,811	$1,000	$2,400	**$1,520**	*100%*
Tinta Cao	**0**	**6**	$682	$13,382			**$2,272**	*100%*
Zinfandel	**11**	**14**	$20,596	$26,448			**$1,900**	*100%*
Total RED	**41848**	**57487**	**$58,540,838**	**$80,349,856**				
WHITE								
Chardonnay	**5717**	**7741**	$8,057,144	$10,910,104	$500	$2,000	**$1,409**	*100%*
Chenin Blanc	**247**	**375**	$197,546	$300,077	$350	$1,000	**$800**	*100%*
Colombard	**15**	**15**	$9,267	$9,267			**$630**	*100%*
Marsanne	**106**	**162**	$190,872	$291,710			**$1,801**	*100%*
Muscadelle (Tokay)	**2**	**2**	$891	$891			**$550**	*100%*
Muscat Blanc (Frontignac)	**12**	**20**	$5,960	$9,920			**$500**	*100%*
Muscat Gordo Blanco	**2**	**8**	$1,150	$5,111			**$639**	*100%*
Pedro Ximenes	**13**	**48**	$7,188	$26,542			**$553**	*100%*
Riesling	**633**	**966**	$750,946	$1,146,186	$700	$1,400	**$1,187**	*100%*
Sauvignon Blanc	**870**	**1495**	$1,008,100	$1,731,668	$611	$2,000	**$1,158**	*100%*
Semillon	**2080**	**2456**	$1,764,129	$2,083,291	$450	$1,400	**$848**	*100%*
Traminer	**38**	**38**	$30,398	$30,398			**$805**	*100%*
Verdelho	**87**	**225**	$94,302	$244,279			**$1,084**	*100%*
Viognier	**235**	**343**	$427,425	$625,617	$1,600	$2,000	**$1,822**	*100%*
Total WHITE	**10055**	**13894**	**$12,545,318**	**$17,415,062**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.

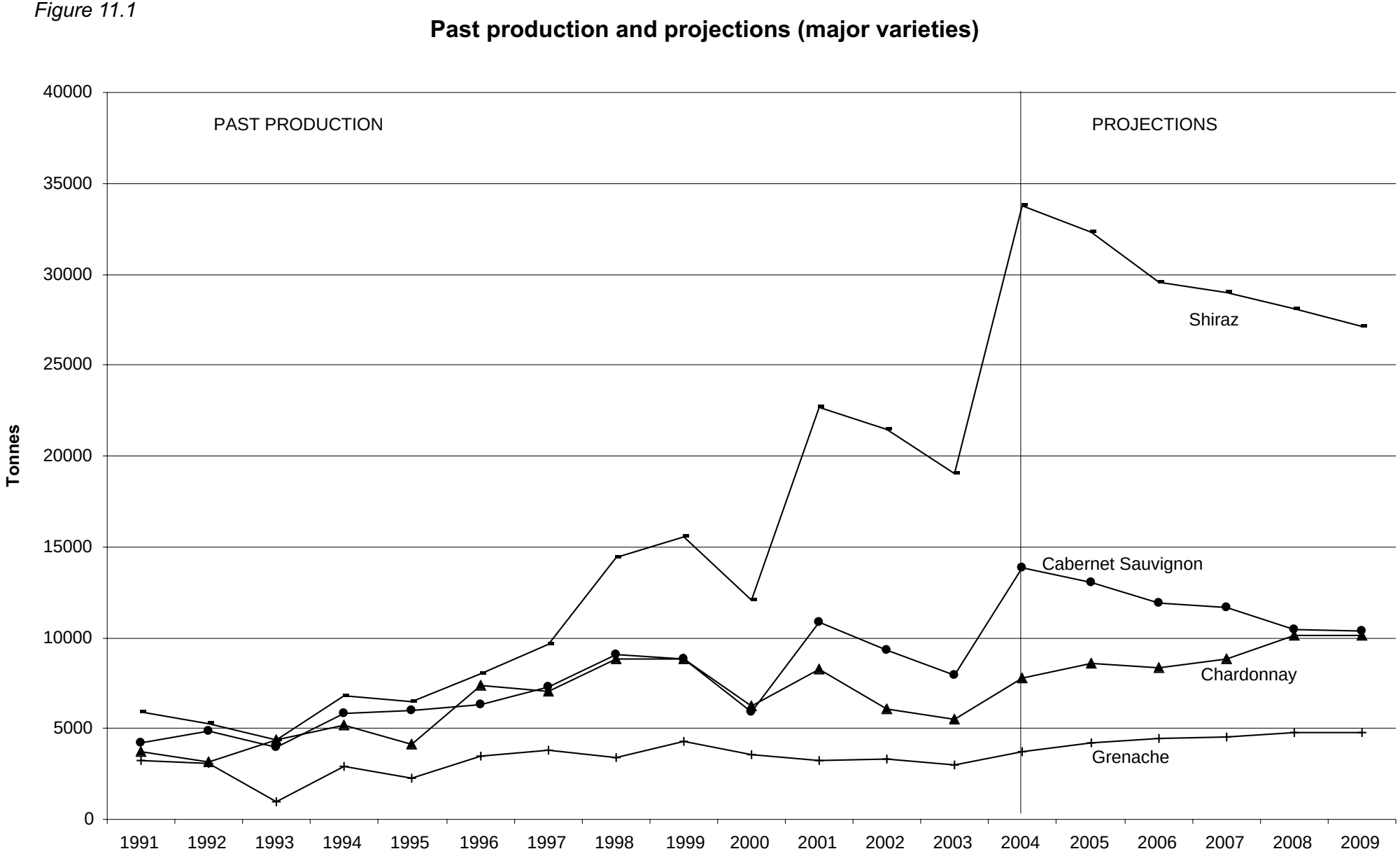
MCLAREN VALE ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 11.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	48	48	59	58	62	60	63	61	63	61
Cabernet Franc	236	213	222	199	223	201	164	161	164	164
Cabernet Sauvignon	13060	10783	11873	9846	11671	10188	10418	9246	10364	9279
Chambourcin	30	30	30	30	30	30	30	30	30	30
Durif	3	5	5	5	5	5	6	8	6	10
Grenache	4183	3659	4468	4414	4547	4557	4746	4760	4749	4768
Malbec	72	73	64	64	63	63	63	63	63	63
Mataro (Mouvedre)	141	151	146	156	153	163	155	165	155	165
Merlot	2876	2615	2694	2445	2658	2540	2450	2438	2467	2521
Nebbiolo	100	98	100	98	100	98	100	97	101	98
Other red	106	137	112	38	122	152	64	93	69	93
Petit Verdot	619	449	630	442	619	442	475	330	461	316
Pinot Noir	792	837	943	951	907	926	919	919	919	919
Sangiovese	351	324	406	371	413	375	338	378	338	378
Shiraz	32345	29975	29536	28846	28970	29975	28098	30955	27102	31397
Tempranillo	197	181	207	191	201	189	132	186	117	186
Zinfandel	20	30	27	40	40	40	40	40	40	40
Total for RED	55178	49608	51523	48303	50782	50004	48261	49930	47206	50488
WHITE										
Chardonnay	8579	8058	8358	7689	8802	8036	10140	9331	10152	9332
Chenin Blanc	299	304	320	270	280	280	290	290	300	300
Colombard	15	15	15	15	16	16	16	16	18	18
Marsanne	155	155	160	160	160	160	160	160	160	160
Muscadelle (Tokay)	10	10	10	10	10	10	10	10	10	10
Muscat Blanc	26	26	26	26	26	26	26	26	26	26
Muscat Gordo Blanco	10	10	10	10	10	10	10	10	10	10
Pedro Ximenes	43	48	43	48	43	48	43	48	43	48
Pinot Gris	0	18	0	17	0	17	0	16	0	16
Riesling	1033	1028	974	989	964	979	898	913	880	895
Roussanne	75	105	110	110	110	110	110	110	110	110
Sauvignon Blanc	1603	1766	1650	1830	1731	2013	1807	2093	1807	2093
Semillon	2079	1898	1514	1354	1481	1325	1471	1314	1475	1319
Traminer	40	40	328	328	342	342	356	356	356	356
Verdelho	348	345	244	241	258	254	225	247	225	252
Viognier	289	349	292	354	292	360	292	361	292	361
Total for WHITE	14604	14175	14053	13451	14525	13986	15854	15301	15864	15306
Total for region	69782	63783	65576	61754	65307	63990	64115	65231	63070	65794

MCLAREN VALE PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2009

Figure 11.1



PADTHAWAY VINTAGE OVERVIEW

Vintage Report

The season began with a wet August – the first for a few years. Cool and windy conditions prevailed through September and October.

Budburst was very good and even through most varieties. Light early frosts gave some leaf damage in isolated pockets to fruit and leaf. While the damage looked bad the vines recovered extremely well with most going on to produce a reasonable crop.

Flowering happened over a short period in ideal conditions and the set in most varieties was excellent. This together with good shoot numbers led to very heavy crop loads.

Many growers had to thin crops to maintain quality and it was interesting to see a lot of mechanical thinning done with harvesters, quite effectively in most cases.

January was very cool and average temperatures were well below normal while February and March were warm. Mild weather continued through April and May.

Disease pressures were low with no real problems from mildew all season. There was some botrytis about in late summer and autumn; however, the weather was kind through the autumn and damage was slight.

Harvest was conducted in great weather conditions with little rain about. The heavy crop loads caused harvest to be later than normal, particularly in the red varieties.

Quality this season was excellent in the white varieties. The reds were very good, mainly due to the favourable weather during autumn allowing late ripening.

Ian Ward

President, Padthaway Grapegrowers Ass.

Overview of vintage statistics

Padthaway produced 51,130 tonnes this year – a massive increase of 85% compared with 2003. There were surpluses of most red varieties, and smaller surpluses of white varieties. An interesting finding was a significant increase in the share of purchased fruit in the white varieties – up from 19% to 27%. This probably reflects more crop-thinning in winery-owned vineyards to reduce yield.

The calculated average purchase value for Cabernet Sauvignon and Shiraz dropped by $500 per tonne or more. The average value per tonne of Chardonnay dropped by around $150. However, the total income for growers in the region increased by over 50%, and the estimated value of all grapes from the region increased from $38 million to $55 million.

The forecast is for a stabilisation in intake at around 38,000 tonnes (much less than the 2004 vintage), with whites increasing by 1,000 tonnes over the five years and reds decreasing by a similar amount. There is a consistent surplus of Cabernet Sauvignon.

Chardonnay remains the major variety for the region. It is set to increase its share of total intake over the forecast period from 27% to 36%, while its nearest rival – Shiraz - declines. Consistent with the lack of growth forecast for the region, there was very little new planting in the region in 2003, and the total area of registered vines actually declined slightly compared with the previous year.

PADTHAWAY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 12.1

	Current area in hectares by year planted							
Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
CABERNET FRANC	24	0	0	0	0	0	24	0%
CABERNET SAUVIGNON	623	109	72	9	6	0	819	0%
MALBEC	37	0	0	0	0	0	37	0%
MERLOT	163	6	0	0	0	0	169	0%
NEBBIOLO	0	0	1	0	0	0	1	0%
PETIT VERDOT	5	0	0	0	0	0	5	0%
PINOT NOIR	95	0	3	0	0	0	98	0%
SANGIOVESE	0	1	4	0	0	0	5	0%
SHIRAZ	689	73	75	79	65	11	993	1%
OTHER RED	1	0	0	0	0	0	1	0%
TOTAL RED WINEGRAPES	**1637**	**189**	**155**	**88**	**71**	**11**	**2152**	**1%**
WHITE WINEGRAPES								
CHARDONNAY	721	0	18	61	79	24	902	3%
MUSCAT BLANC	12	0	0	0	0	0	12	0%
RIESLING	284	0	0	17	0	0	301	0%
SAUVIGNON BLANC	49	2	0	0	0	7	58	12%
SEMILLON	79	0	0	0	0	0	79	0%
TRAMINER	30	0	0	0	0	9	39	23%
VERDELHO	32	2	0	0	0	0	34	0%
VIOGNIER	4	0	4	5	0	0	13	0%
OTHER WHITE	0	0	0	0	0	0	0	0%
TOTAL WHITE WINEGRAPES	**1211**	**4**	**22**	**83**	**79**	**40**	**1438**	**3%**
TOTAL ALL VARIETIES	**2849**	**193**	**177**	**170**	**151**	**51**	**3590**	**1%**

PADTHAWAY TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 12.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Cabernet Franc	**411**	**0**	**411**	**283**	0%	145%	3	0	2
Cabernet Sauvignon	**5433**	**5953**	**11386**	**9249**	52%	123%	5	12	13
Malbec	**187**	**128**	**315**	**235**	41%	134%	3	2	3
Merlot	**1782**	**458**	**2240**	**1816**	20%	123%	6	7	8
Meunier	**8**	**0**	**8**	**8**	0%	100%	1	0	1
Petit Verdot	**61**	**0**	**61**	**24**	0%	259%	2	0	1
Pinot Noir	**1803**	**235**	**2038**	**1183**	12%	172%	4	2	3
Ruby Cabernet	**25**	**0**	**25**	**25**	0%	100%	1	0	1
Sangiovese	**0**	**24**	**24**	**24**	100%	101%	0	1	1
Shiraz	**6784**	**7026**	**13810**	**11218**	51%	123%	7	15	18
Total RED	**16495**	**13824**	**30319**	**24066**	46%	126%			
WHITE									
Arneis	**3**	**0**	**3**	**3**	0%	100%	1	0	1
Chardonnay	**9647**	**4801**	**14448**	**13215**	33%	109%	6	16	18
Muscat Blanc (Frontignac)	**108**	**0**	**108**	**108**	0%	100%	1	0	1
Riesling	**2809**	**157**	**2966**	**2896**	5%	102%	3	1	2
Sauvignon Blanc	**779**	**216**	**994**	**670**	22%	148%	4	4	6
Semillon	**1131**	**232**	**1363**	**1363**	17%	100%	2	2	4
Traminer	**381**	**0**	**381**	**381**	0%	100%	2	0	2
Verdelho	**395**	**67**	**462**	**417**	15%	111%	2	2	3
Viognier	**41**	**46**	**87**	**200**	53%	43%	1	1	1
Total WHITE	**15293**	**5518**	**20812**	**19253**	27%	108%			
Total for region	**31788**	**19342**	**51130**	**43318**					

PADTHAWAY CROP VALUE DATA - VINTAGE 2004

Table 12.3

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Cabernet Sauvignon	**5953**	**11386**	$5,326,859	$10,188,789	$200	$1,767	**$895**	*100%*
Malbec	**128**	**315**	$78,743	$194,252			**$617**	*100%*
Merlot	**458**	**2240**	$495,819	$2,425,615	$350	$1,766	**$1,083**	*100%*
Pinot Noir	**235**	**2038**	$211,058	$1,829,711			**$898**	*100%*
Sangiovese	**24**	**24**	$42,727	$42,727			**$1,766**	*100%*
Shiraz	**7026**	**13810**	$7,454,732	$14,652,429	$340	$1,800	**$1,061**	*99%*
Total RED	**13824**	**29813**	**$13,609,938**	**$29,333,523**				
WHITE								
Chardonnay	**4801**	**14448**	$6,372,865	$19,177,940	$500	$1,766	**$1,327**	*100%*
Riesling	**157**	**2966**	$172,766	$3,262,567			**$1,100**	*100%*
Sauvignon Blanc	**216**	**994**	$251,206	$1,158,776	$855	$1,400	**$1,166**	*100%*
Semillon	**232**	**1363**	$230,131	$1,351,695			**$992**	*100%*
Verdelho	**67**	**462**	$40,340	$276,785			**$599**	*100%*
Viognier	**46**	**87**	$80,508	$153,138			**$1,766**	*100%*
Total WHITE	**5518**	**20319**	**$7,147,816**	**$25,380,901**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
(3) This does not include end use bonuses or other adjustments determined post-receival.

PADTHAWAY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

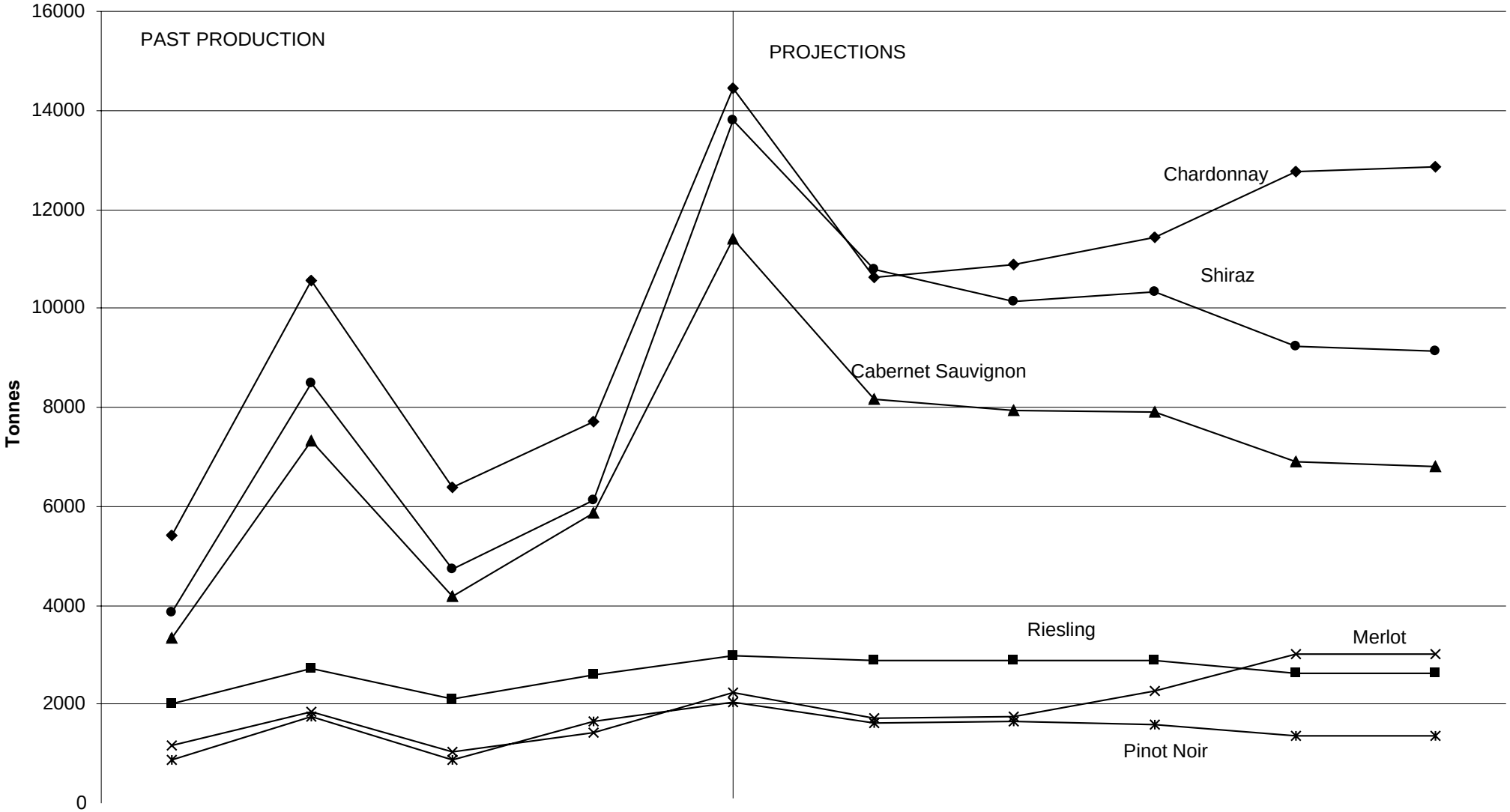
Table 12.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Franc	**202**	**124**	**202**	**124**	**202**	**124**	**202**	**124**	**202**	**124**
Cabernet Sauvignon	**8178**	**6997**	**7949**	**6796**	**7906**	**6791**	**6887**	**5934**	**6801**	**6010**
Malbec	**247**	**185**	**202**	**140**	**202**	**140**	**180**	**140**	**180**	**140**
Merlot	**1725**	**1407**	**1745**	**1427**	**2273**	**2141**	**3003**	**2754**	**3007**	**2866**
Meunier	**4**	**4**	**4**	**4**	**4**	**4**	**0**	**0**	**0**	**0**
Petit Verdot	**40**	**13**	**27**	**0**	**27**	**0**	**27**	**0**	**27**	**0**
Pinot Noir	**1617**	**819**	**1650**	**852**	**1571**	**773**	**1345**	**547**	**1345**	**547**
Ruby Cabernet	**20**	**20**	**20**	**20**	**20**	**20**	**0**	**0**	**0**	**0**
Sangiovese	**49**	**49**	**49**	**49**	**49**	**49**	**50**	**50**	**50**	**50**
Shiraz	**10775**	**9887**	**10131**	**9453**	**10339**	**9728**	**9229**	**9012**	**9121**	**9117**
Total for RED	**22858**	**19505**	**21980**	**18865**	**22594**	**19770**	**20923**	**18561**	**20733**	**18854**
WHITE										
Arneis	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**
Chardonnay	**10609**	**9995**	**10878**	**10383**	**11427**	**11263**	**12768**	**12709**	**12849**	**12840**
Muscat Blanc	**124**	**124**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Riesling	**2883**	**2818**	**2883**	**2818**	**2883**	**2818**	**2622**	**2557**	**2622**	**2557**
Sauvignon Blanc	**725**	**625**	**764**	**693**	**780**	**710**	**851**	**780**	**851**	**780**
Semillon	**525**	**525**	**457**	**457**	**457**	**457**	**56**	**56**	**56**	**56**
Traminer	**633**	**115**	**414**	**414**	**474**	**474**	**557**	**395**	**557**	**395**
Verdelho	**330**	**330**	**269**	**269**	**269**	**269**	**267**	**267**	**267**	**267**
Viognier	**110**	**250**	**141**	**280**	**141**	**300**	**0**	**300**	**0**	**300**
Total for WHITE	**15940**	**14783**	**15808**	**15315**	**16433**	**16292**	**17122**	**17065**	**17203**	**17196**
Total for region	**38798**	**34288**	**37788**	**34180**	**39027**	**36062**	**38045**	**35626**	**37936**	**36050**

PADTHAWAY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 2000 - 2009

Figure 12.1

Past production and projections (major varieties)



RIVERLAND VINTAGE OVERVIEW

Vintage Report

The 2004 vintage ran very smoothly, apart from some difficulties encountered in February due to excessive heat lasting about seven days or so, with temperatures in the mid to high 40's,. Some baumes jumped dramatically immediately after the heat which in turn caused some intake programming difficulties and a heart flutter for a day or two but then things settled down again. There was an extended period after this heat where baumes did not move for up to 3 to 4 weeks, and in some cases actually went backwards for some fruit, in particular Shiraz and Cabernet Sauvignon. This actually contributed to a smooth vintage in a record year, allowing fruit to be programmed into wineries over a longer period of time. There were no rain events and disease pressure was very low to non existent.

Overall a very smooth running vintage in a record year.

Bill Wilden, The Hardy Wine Company

Overview of vintage statistics

The Riverland produced 440,121 tonnes this year – 19% more than last year, and even breaking the previous record of 433,893 tonnes in 2002. There was an oversupply in Cabernet Sauvignon of 20,000 tonnes, and 10,000 tonne in Shiraz. The white varieties were in balance.

The average purchase value per tonne for the major red varieties Cabernet Sauvignon, Shiraz and Merlot dropped by $100 per tonne or more. On the other hand, the Chardonnay average purchase value was very similar to last year. Despite the lower average prices, total income to growers was slightly higher for red varieties ($115.4 million compared with $114 last year) and white varieties it was substantially higher ($89 million compared with $70 million).

The forecast for the Riverland is for a stabilisation in production of red varieties at around 280,000 tonnes and an intake in excess of requirements for Cabernet Sauvignon. In the minor varieties, there is expected to be a substantial excess intake of Ruby Cabernet, while Merlot and Grenache are in balance. There has been a further downward revision of 20,000 tonnes in the preferred intake figures for red varieties since the 2003 survey.

There has also been a slight downward revision in the preferred intake figures for white varieties since last year. It is now estimated that intake will decline to around 223,000 tonnes, with estimated and preferred intake being in balance.

It is important to note that these intake figures do not necessarily match the region's production potential. A further 650 hectares were planted in the Riverland in 2003, giving a total area of 20,869 hectares. Based on current plantings, and using an estimated yield figure of 17 t/ha for reds, and 20 t/ha for whites, it is estimated that the production from the region in 2009 will be 375,000 tonnes. This means a shortfall of around 125,000 tonnes. A further 6,000 hectares would need to be planted by 2006 to address this shortfall – assuming it could not be met from other regions or by adjusting yields.

RIVERLAND CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 13.1

	Current area in hectares by year planted							
Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
CABERNET SAUVIGNON	3041	365	131	57	20	12	3625	0%
GRENACHE	436	49	15	9	2	1	510	0%
MALBEC	52	0	1	0	0	0	54	0%
MATARO (MOUVEDRE)	350	27	12	9	2	0	400	0%
MERLOT	854	92	45	92	30	25	1138	2%
PETIT VERDOT	230	201	112	79	8	2	632	0%
PINOT NOIR	51	34	68	29	17	1	200	1%
RUBY CABERNET	457	183	36	6	5	0	687	0%
SANGIOVESE	25	3	5	1	0	0	33	0%
SHIRAZ	4224	330	113	104	109	150	5031	3%
OTHER RED	92	8	14	9	26	1	141	1%
TOTAL RED WINEGRAPES	**9812**	**1292**	**553**	**393**	**208**	**193**	**12452**	**2%**
WHITE WINEGRAPES								
CHARDONNAY	2252	29	102	632	586	347	3947	9%
CHENIN BLANC	173	1	0	0	0	0	174	0%
COLOMBARD	497	121	114	90	42	21	884	2%
DORADILLO	161	0	0	1	0	0	163	0%
MUSCAT BLANC	48	0	1	3	9	3	64	4%
MUSCAT GORDO BLANCO	1037	3	5	19	25	20	1108	2%
RIESLING	227	0	3	0	2	11	243	5%
SAUVIGNON BLANC	123	0	0	8	15	25	172	15%
SEMILLON	325	10	13	0	2	5	355	1%
SULTANA	491	8	3	9	4	21	536	4%
TRAMINER	52	0	0	35	17	0	105	0%
TREBBIANO	33	0	0	0	0	0	33	0%
VERDELHO	99	6	4	8	0	2	119	1%
VIOGNIER	8	8	20	15	11	3	63	4%
OTHER WHITE	175	2	0	5	0	0	183	0%
TOTAL WHITE WINEGRAPES	**5702**	**188**	**265**	**826**	**713**	**457**	**8151**	**6%**
ROOTSTOCK BLOCK	33	3	0	0	0	0	37	0%
MULTI-PURPOSE / TABLEGRAPES	213	5	1	2	6	3	230	1%
TOTAL ALL VARIETIES	**15760**	**1488**	**820**	**1221**	**927**	**653**	**20869**	**3%**

Note: some increase in area in this region is a result of including previously unregistered growers with older plantings.

RIVERLAND TONNES CRUSHED BY VARIETY (RED) - VINTAGE 2004

Table 13.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
Barbera	**0**	**45**	**45**	**50**	100%	90%	0	3	3
Cabernet Franc	**0**	**193**	**193**	**105**	100%	184%	0	3	1
Cabernet Sauvignon	**9238**	**61359**	**70597**	**51504**	87%	137%	10	23	24
Carignan	**318**	**28**	**346**	**200**	8%	173%	1	1	1
Carina	**0**	**62**	**62**	**62**	100%	100%	0	1	1
Chambourcin	**0**	**78**	**78**	**0**	100%		0	1	0
Durif	**0**	**41**	**41**	**30**	100%	138%	0	2	1
Grenache	**724**	**8984**	**9708**	**7592**	93%	128%	6	13	15
Malbec	**463**	**413**	**877**	**825**	47%	106%	4	4	5
Mataro (Mouvedre)	**25**	**7754**	**7778**	**4221**	100%	184%	2	11	12
Merlot	**1887**	**22594**	**24481**	**24982**	92%	98%	7	18	20
Muscat Rose	**0**	**43**	**43**	**43**	100%	100%	0	1	1
Nebbiolo	**0**	**17**	**17**	**18**	100%	95%	0	2	2
Other red	**65**	**220**	**285**	**130**	84%	635%	2	1	2
Petit Verdot	**854**	**12413**	**13267**	**11009**	94%	121%	6	16	17
Pinot Noir	**334**	**5085**	**5419**	**5385**	94%	101%	1	5	6
Rubired	**75**	**86**	**161**	**238**	53%	68%	1	3	3
Ruby Cabernet	**1320**	**13670**	**14990**	**6774**	91%	221%	4	10	9
Sangiovese	**365**	**456**	**820**	**477**	56%	172%	3	5	5
Shiraz	**11654**	**101706**	**113360**	**102999**	90%	110%	11	24	27
Tarrango	**692**	**881**	**1573**	**1487**	56%	106%	1	3	3
Tempranillo	**26**	**151**	**177**	**172**	85%	103%	1	4	5
Tinta Molle	**25**	**0**	**25**	**25**	0%	101%	1	0	1
Touriga	**58**	**94**	**152**	**152**	62%	100%	3	2	3
Unsound / distillation red	**0**	**36**	**36**	**0**	100%		0	1	0
Total RED	**28122**	**236409**	**264531**	**218479**	89%	121%			

RIVERLAND TONNES CRUSHED BY VARIETY (WHITE) - VINTAGE 2004

Table 13.3

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
Biancone	**619**	**169**	**788**	**454**	21%	173%	1	3	3
Canada Muscat	**0**	**107**	**107**	**107**	100%	100%	0	2	2
Chardonnay	**9943**	**65744**	**75688**	**78276**	87%	97%	9	23	25
Chenin Blanc	**870**	**4754**	**5624**	**5067**	85%	111%	2	9	8
Colombard	**1562**	**27540**	**29102**	**29753**	95%	98%	6	13	14
Crouchen	**73**	**130**	**203**	**202**	64%	100%	1	2	2
Doradillo	**864**	**2003**	**2868**	**2275**	70%	126%	3	6	5
Emerald Riesling	**0**	**69**	**69**	**0**	100%		0	1	0
Muscadelle (Tokay)	**0**	**308**	**308**	**307**	100%	100%	0	5	5
Muscat Blanc (Frontignac)	**0**	**552**	**552**	**531**	100%	104%	0	4	4
Muscat Gordo Blanco	**2319**	**26106**	**28425**	**28956**	92%	98%	3	9	9
Other white	**245**	**238**	**483**	**306**	82%	132%	2	3	2
Palomino	**381**	**151**	**532**	**511**	28%	104%	1	4	3
Pedro Ximenes	**0**	**182**	**182**	**179**	100%	101%	0	4	4
Riesling	**790**	**3204**	**3994**	**4882**	80%	82%	5	7	8
Sauvignon Blanc	**1556**	**2186**	**3742**	**4106**	58%	91%	3	7	9
Semillon	**5477**	**5642**	**11119**	**11307**	51%	98%	5	10	10
Sultana	**207**	**5611**	**5818**	**6440**	96%	90%	2	9	10
Sylvaner	**614**	**153**	**767**	**552**	20%	139%	1	2	3
Taminga	**37**	**122**	**159**	**95**	77%	167%	1	3	2
Traminer	**491**	**1143**	**1634**	**1627**	70%	100%	2	5	6
Trebbiano	**34**	**219**	**253**	**115**	87%	220%	1	3	2
Verdelho	**94**	**2312**	**2407**	**2395**	96%	100%	2	9	9
Viognier	**330**	**438**	**768**	**765**	57%	100%	1	5	5
Total WHITE	**26507**	**149083**	**175589**	**179318**	85%	98%			
Total for region	**54629**	**385492**	**440121**	**397797**					

RIVERLAND CROP VALUE DATA (RED) - VINTAGE 2004

Table 13.4

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
Barbera	**45**	**45**	$15,437	$15,437	$250	$450	**$343**	*100%*
Cabernet Franc	**193**	**193**	$90,996	$90,996	$350	$600	**$472**	*100%*
Cabernet Sauvignon	**61359**	**70597**	$24,371,554	$28,040,802	$200	$915	**$397**	*100%*
Carignan	**28**	**346**	$8,770	$108,940			**$315**	*100%*
Carina	**62**	**62**	$15,684	$15,684			**$253**	*100%*
Chambourcin	**78**	**78**	$27,293	$27,293			**$350**	*100%*
Durif	**41**	**41**	$20,400	$20,400			**$493**	*100%*
Grenache	**8984**	**9708**	$3,775,432	$4,079,586	$200	$855	**$420**	*100%*
Malbec	**413**	**877**	$155,549	$329,754	$200	$415	**$376**	*100%*
Mataro (Mouvedre)	**7754**	**7778**	$3,031,171	$3,040,827	$150	$1,029	**$391**	*100%*
Merlot	**22594**	**24481**	$10,943,264	$11,857,343	$250	$915	**$484**	*100%*
Muscat Brown (Red Front)	**21**	**21**	$11,948	$11,948			**$570**	*100%*
Muscat Rose	**43**	**43**	$22,052	$22,052			**$515**	*100%*
Nebbiolo	**17**	**17**	$6,017	$6,017			**$351**	*100%*
Other red (group together)	**153**	**182**	$87,117	$103,413			**$569**	*100%*
Petit Verdot	**12413**	**13267**	$4,833,177	$5,165,541	$200	$800	**$389**	*100%*
Pinot Noir	**5085**	**5419**	$2,969,852	$3,164,931	$400	$750	**$584**	*100%*
Rubired	**86**	**161**	$31,951	$59,871	$250	$400	**$372**	*100%*
Ruby Cabernet	**13670**	**14990**	$4,926,424	$5,401,960	$200	$915	**$360**	*100%*
Saint Macaire	**44**	**44**	$15,438	$15,439			**$350**	*100%*
Sangiovese	**456**	**820**	$180,794	$325,382	$200	$650	**$397**	*100%*
Shiraz	**101706**	**113360**	$59,411,030	$66,218,820	$250	$900	**$584**	*100%*
Tarrango	**881**	**1573**	$352,157	$628,631	$150	$600	**$400**	*100%*
Tempranillo	**151**	**177**	$66,485	$77,927	$360	$500	**$440**	*100%*
Touriga	**94**	**152**	$47,013	$76,124			**$500**	*100%*
Zinfandel	**2**	**2**	$654	$655			**$385**	*100%*
Total RED	**236373**	**264434**	**$115,417,659**	**$128,905,773**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.

RIVERLAND CROP VALUE DATA (WHITE) - VINTAGE 2004

Table 13.5

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
Biancone	**169**	**788**	$42,446	$198,078	$220	$255	**$251**	*100%*
Canada Muscat	**107**	**107**	$44,804	$44,804			**$420**	*100%*
Chardonnay	**65744**	**75688**	$58,966,562	$67,884,867	$465	$1,200	**$897**	*100%*
Chenin Blanc	**4754**	**5624**	$1,602,527	$1,895,695	$282	$500	**$337**	*99%*
Colombard	**27540**	**29102**	$9,624,984	$10,170,879	$275	$450	**$349**	*100%*
Crouchen	**130**	**203**	$36,998	$57,944			**$286**	*100%*
Doradillo	**2003**	**2868**	$558,497	$799,483	$120	$350	**$279**	*100%*
Emerald Riesling	**69**	**69**	$24,084	$24,084			**$350**	*100%*
Italia	**10**	**10**	$3,253	$3,253			**$324**	*100%*
Marsanne	**3**	**3**	$1,580	$1,580			**$500**	*100%*
Muscadelle (Tokay)	**308**	**308**	$103,058	$103,058	$250	$607	**$334**	*100%*
Muscat Blanc (Frontignac)	**552**	**552**	$203,693	$203,693	$322	$500	**$369**	*100%*
Muscat Gordo Blanco	**26106**	**28425**	$8,967,485	$9,764,111	$224	$464	**$343**	*100%*
Other white	**201**	**245**	$76,553	$93,213			**$381**	*100%*
Palomino	**151**	**532**	$37,721	$132,854	$150	$255	**$250**	*100%*
Pedro Ximenes	**182**	**182**	$45,222	$45,222	$230	$255	**$249**	*100%*
Pinot Gris	**4**	**4**	$1,302	$1,302			**$300**	*100%*
Riesling	**3204**	**3994**	$1,455,471	$1,814,226	$250	$539	**$454**	*100%*
Sauvignon Blanc	**2186**	**3742**	$1,181,937	$2,023,401	$250	$1,000	**$541**	*100%*
Semillon	**5642**	**11119**	$2,623,373	$5,170,172	$320	$650	**$465**	*100%*
Sultana	**5611**	**5818**	$1,644,847	$1,705,469	$220	$330	**$293**	*100%*
Sylvaner	**153**	**767**	$49,996	$251,200			**$328**	*100%*
Taminga	**122**	**159**	$41,758	$54,260	$250	$420	**$342**	*100%*
Traminer	**1143**	**1634**	$589,834	$843,064	$400	$650	**$516**	*100%*
Trebbiano	**219**	**253**	$60,572	$69,908	$200	$325	**$276**	*100%*
Verdelho	**2312**	**2407**	$1,035,551	$1,077,806	$325	$550	**$448**	*100%*
Viognier	**438**	**768**	$362,042	$635,393	$700	$1,000	**$827**	*81%*
Total WHITE	**149063**	**175368**	**$89,386,150**	**$105,069,021**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.

RIVERLAND ESTIMATED AND PREFERRED FUTURE INTAKE OF RED GRAPES 2005 TO 2009

Table 13.6

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
Barbera	**82**	**52**	**82**	**52**	**52**	**52**	**57**	**57**	**57**	**57**
Cabernet Franc	**188**	**105**	**190**	**105**	**190**	**105**	**190**	**105**	**190**	**105**
Cabernet Sauvignon	**77849**	**59967**	**77492**	**61486**	**80736**	**64945**	**81551**	**66653**	**80604**	**66130**
Carignan	**314**	**150**	**314**	**150**	**314**	**150**	**314**	**150**	**314**	**100**
Chambourcin	**65**	**0**	**65**	**0**	**65**	**0**	**65**	**0**	**65**	**0**
Durif	**47**	**41**	**74**	**66**	**74**	**66**	**74**	**66**	**74**	**66**
Grenache	**9955**	**8610**	**10005**	**8696**	**10007**	**8680**	**9988**	**8706**	**9826**	**8622**
Malbec	**844**	**832**	**849**	**837**	**781**	**769**	**758**	**746**	**758**	**746**
Mataro (Mouvedre)	**7021**	**3975**	**6860**	**4023**	**6622**	**3805**	**6285**	**3548**	**5704**	**3145**
Merlot	**29041**	**29132**	**32089**	**32034**	**31248**	**31243**	**34127**	**34162**	**33598**	**33643**
Muscat Brown	**33**	**33**	**33**	**33**	**33**	**33**	**33**	**33**	**33**	**33**
Muscat Rose	**48**	**48**	**56**	**56**	**56**	**56**	**56**	**56**	**56**	**56**
Nebbiolo	**13**	**5**	**13**	**5**	**5**	**5**	**5**	**5**	**5**	**5**
Other red	**255**	**113**	**218**	**68**	**203**	**53**	**203**	**53**	**203**	**53**
Petit Verdot	**13390**	**11832**	**13372**	**11799**	**12700**	**11111**	**11508**	**10070**	**11208**	**9309**
Pinot Noir	**5793**	**5793**	**10154**	**10154**	**10388**	**10388**	**10432**	**10432**	**10119**	**10119**
Rubired	**338**	**245**	**348**	**255**	**343**	**250**	**353**	**260**	**383**	**290**
Ruby Cabernet	**13569**	**7609**	**13263**	**7365**	**12251**	**6365**	**11662**	**6049**	**11119**	**5456**
Sangiovese	**418**	**201**	**424**	**207**	**412**	**215**	**340**	**163**	**351**	**174**
Shiraz	**113388**	**113130**	**117564**	**119140**	**116035**	**118733**	**114060**	**122410**	**111787**	**124310**
Tarrango	**1101**	**1070**	**1101**	**1070**	**201**	**170**	**201**	**170**	**201**	**170**
Tempranillo	**491**	**471**	**507**	**487**	**509**	**489**	**269**	**249**	**271**	**271**
Tinta Cao	**59**	**59**	**59**	**59**	**59**	**59**	**59**	**59**	**59**	**59**
Tinta Molle	**40**	**40**	**40**	**40**	**40**	**40**	**40**	**40**	**40**	**40**
Touriga	**172**	**172**	**204**	**204**	**207**	**207**	**210**	**210**	**214**	**214**
Zinfandel	**5**	**0**	**5**	**0**	**5**	**0**	**5**	**0**	**5**	**0**
Total for RED	**274519**	**243685**	**285381**	**258391**	**283536**	**257989**	**282846**	**264452**	**277245**	**263173**

RIVERLAND ESTIMATED AND PREFERRED FUTURE INTAKE OF WHITE GRAPES 2005 TO 2009

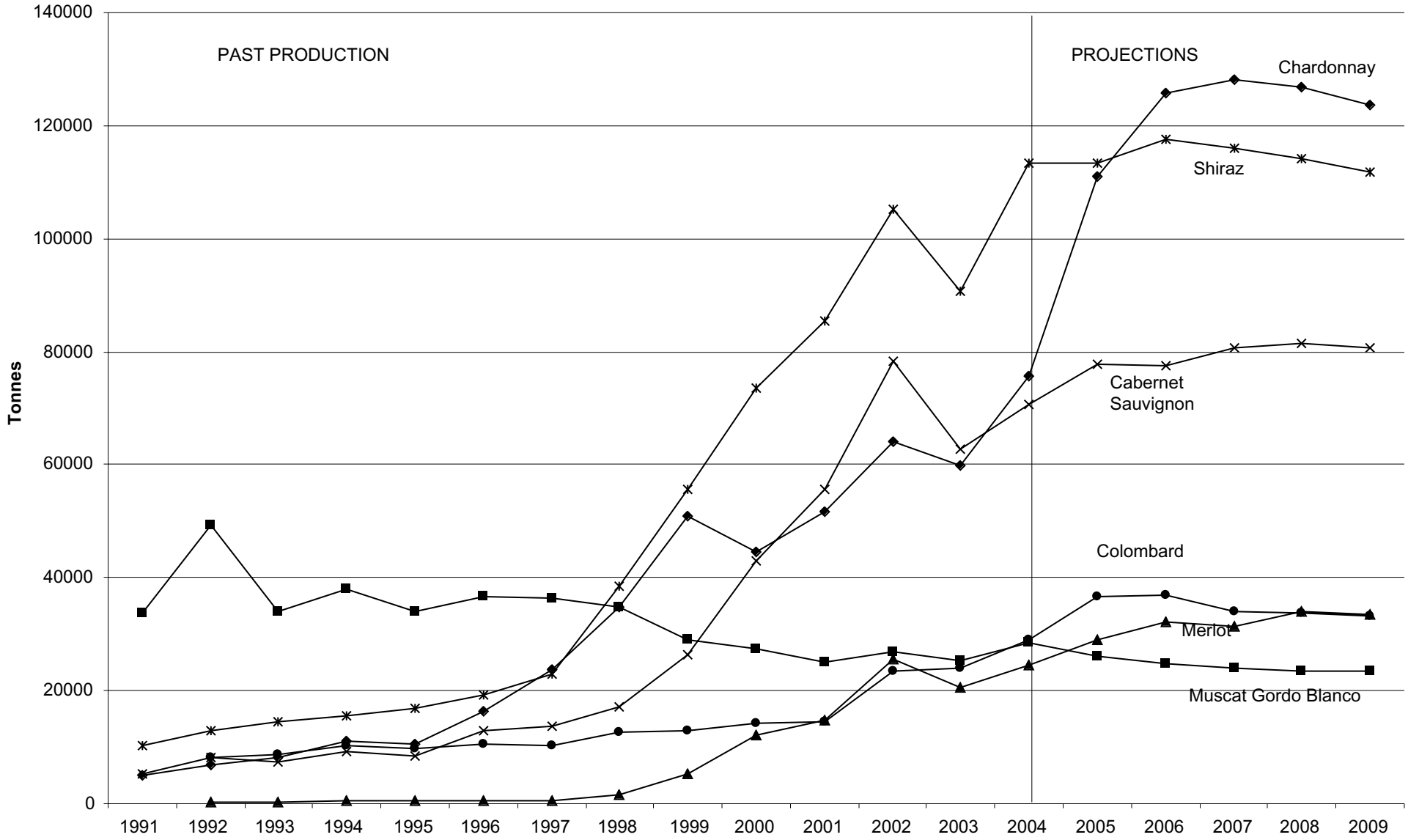
Table 13.7

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
Biancone	**834**	**400**	**484**	**350**	**484**	**350**	**484**	**300**	**484**	**300**
Canada Muscat	**204**	**204**	**244**	**244**	**217**	**217**	**172**	**172**	**132**	**132**
Chardonnay	**110887**	**112635**	**125647**	**127018**	**128100**	**128929**	**126789**	**132119**	**123667**	**129453**
Chenin Blanc	**4992**	**4414**	**6726**	**6048**	**6627**	**5949**	**7423**	**6695**	**7236**	**6508**
Colombard	**36762**	**37227**	**36863**	**37228**	**33986**	**34401**	**33776**	**34511**	**33166**	**33631**
Crouchen	**191**	**186**	**191**	**186**	**169**	**164**	**147**	**142**	**147**	**142**
Doradillo	**2337**	**1820**	**2307**	**1820**	**2167**	**1680**	**2137**	**1650**	**2127**	**1640**
Marsanne	**18**	**18**	**26**	**26**	**31**	**31**	**31**	**31**	**31**	**31**
Muscadelle (Tokay)	**427**	**402**	**422**	**402**	**345**	**325**	**268**	**248**	**268**	**248**
Muscat Blanc	**736**	**736**	**1013**	**1013**	**1046**	**1046**	**975**	**975**	**975**	**975**
Muscat Gordo Blanco	**25397**	**26040**	**25588**	**26131**	**22526**	**24089**	**21228**	**12971**	**19672**	**11681**
Orange Muscat	**60**	**60**	**60**	**60**	**60**	**60**	**60**	**60**	**60**	**60**
Other white	**925**	**805**	**980**	**860**	**990**	**870**	**963**	**870**	**944**	**870**
Palomino	**542**	**509**	**542**	**509**	**482**	**449**	**482**	**449**	**482**	**449**
Pedro Ximenes	**65**	**45**	**60**	**40**	**60**	**40**	**60**	**40**	**60**	**40**
Pinot Gris	**18**	**18**	**6**	**6**	**6**	**6**	**6**	**6**	**6**	**6**
Riesling	**4288**	**5125**	**4631**	**5373**	**4641**	**5428**	**4524**	**5298**	**4444**	**5218**
Roussanne	**3**	**3**	**6**	**6**	**6**	**6**	**6**	**6**	**6**	**6**
Sauvignon Blanc	**5125**	**5897**	**5975**	**6917**	**6125**	**7160**	**6143**	**7181**	**6181**	**7169**
Semillon	**10962**	**11162**	**10902**	**11152**	**10800**	**11000**	**10980**	**11040**	**10775**	**10875**
Sultana	**4899**	**5499**	**4824**	**5324**	**4398**	**4898**	**4228**	**4728**	**3430**	**3930**
Sylvaner	**780**	**630**	**780**	**630**	**780**	**630**	**780**	**580**	**780**	**580**
Taminga	**136**	**60**	**136**	**60**	**136**	**60**	**136**	**60**	**126**	**50**
Traminer	**2225**	**2275**	**3071**	**3121**	**3167**	**3217**	**3200**	**3250**	**3120**	**3170**
Trebbiano	**219**	**150**	**211**	**150**	**211**	**150**	**211**	**150**	**211**	**150**
Verdelho	**3238**	**3288**	**3142**	**3192**	**3051**	**3051**	**3041**	**3041**	**2974**	**2974**
Viognier	**998**	**1389**	**1384**	**1973**	**1504**	**2513**	**1472**	**2711**	**1522**	**2911**
Total for WHITE	**217268**	**220997**	**236221**	**239839**	**232115**	**236719**	**229721**	**229284**	**223026**	**223199**
Total for region	**491787**	**464682**	**521602**	**498230**	**515651**	**495708**	**512567**	**493736**	**500271**	**486372**

RIVERLAND PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2009

Figure 13.1

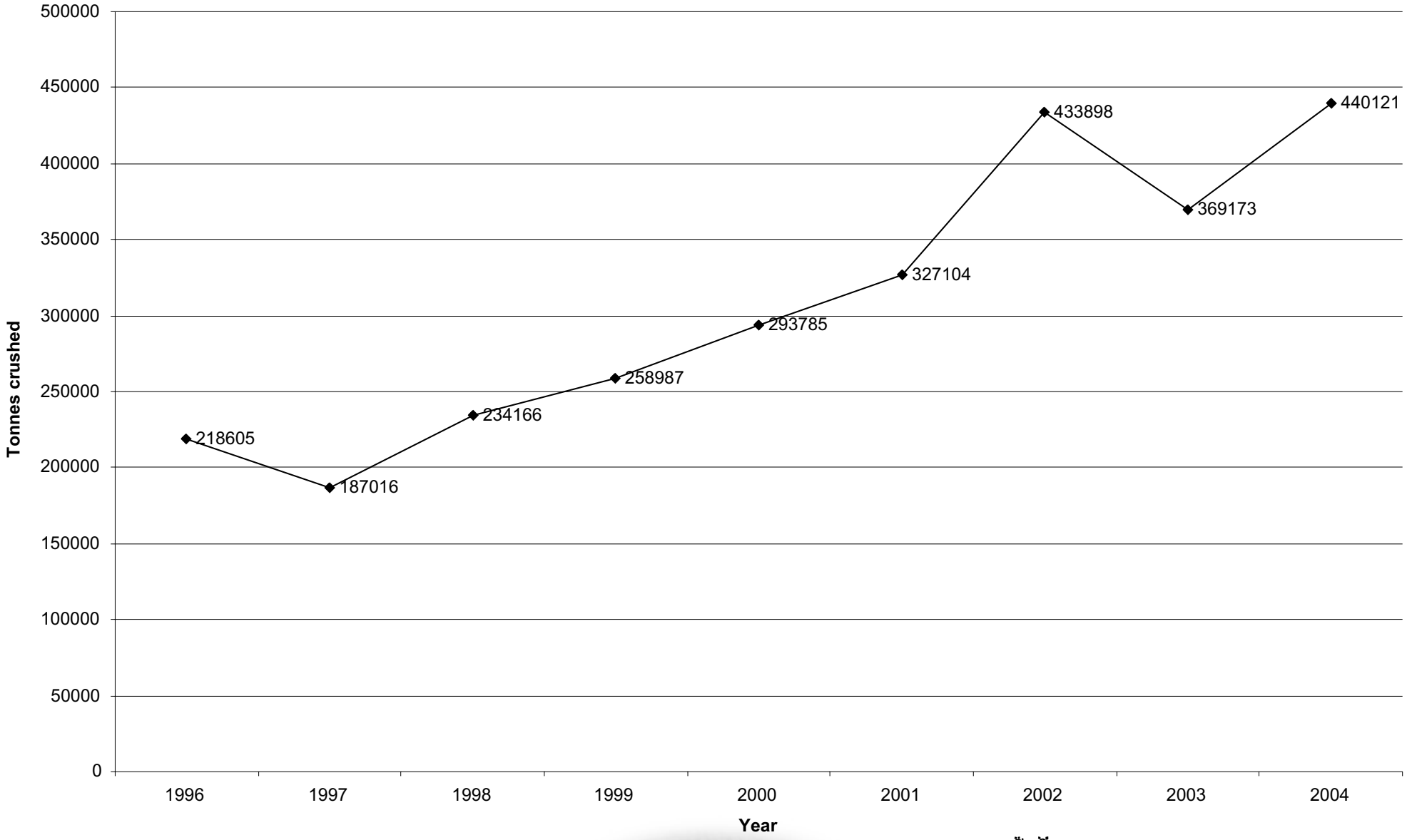
Past production and projections (major varieties)



RIVERLAND TOTAL PRODUCTION 1996 - 2004

Figure 13.2

Historical production Riverland region 1996 - 2004



WRATTONBULLY VINTAGE OVERVIEW

Vintage report

Wrattonbully bounced back from the lower yielding previous vintages with very good crops across all varieties, and a relatively easy growing period. Vine vigour matched fruitfulness to find that crops matured adequately – even if slightly later than normal. For those who crop thinned, there were some outstanding results with a lot learned from the exercise.

The vibrant season saw vine canopies in excellent condition, very few pests and diseases of note, and a very much reduced requirement for supplementary irrigation. Heat Degree Day units = 1393 against a long term average of 1508, with low figures every other month indicating a 'see- saw' type of growing season benefiting the early ripening varieties the most. Cabernet proved to be the pick of the reds – the 'Indian summer' conditions at the end, a key factor.

Rain always creates some anxiety during harvest, with conditions in late March causing some late Botrytis – very close to the point of picking.

Peter Bird and Peter Freckleton
Wrattonbully Grapegrowers' Association

Overview of vintage statistics

Wrattonbully produced 28,451 tonnes in 2004 – more than double the previous vintage. As in many regions, there was a surplus of red varieties (nearly 6,000 tonnes) but whites were in balance. NB Whites account for less than 10% of the production of this region.

While the calculated average purchase value of Shiraz and Cabernet Sauvignon each fell by around $300 per tonne, the total income to growers from red varieties doubled because of the large tonnages, and the total estimated value of grapes from the region increased from $20 million in 2003 to $36.5 million in 2004.

The forecast is for intake of red varieties to remain at around 20,000 tonnes, and white varieties at 2,000 tonnes. There has been a substantial downward revision in the wineries' preferred intake figure compared with last year's survey. Last year there was a 14,000 tonne shortfall between estimated and preferred intake of red varieties in 2008, whereas this year there is a 1,000 tonne surplus.

There was a significant amount of new planting in the region in 2003: in particular 27 hectares (17% increase) of Chardonnay and 41 hectares (7% increase) of Shiraz. Production estimates show that, based on current plantings, the region can be expected to produce around 23,000 tonnes in 2009, giving an approximate surplus of 3,000 tonnes (mainly red varieties) between production and preferred intake. However, as illustrated above, demand forecasts can change substantially from year to year in accordance with changes in market conditions.

WRATTONBULLY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 14.1

Current area in hectares by year planted

Variety	*Pre-1999*	*1999*	*2000*	*2001*	*2002*	*2003*	*Total area*	*% planted in 2003*
RED WINEGRAPES								
BARBERA	0	0	0	1	0	0	1	0%
CABERNET FRANC	1	0	0	0	0	0	1	0%
CABERNET SAUVIGNON	713	106	54	107	10	2	993	0%
MALBEC	1	3	0	2	0	0	6	0%
MERLOT	149	32	16	44	7	7	256	3%
PETIT VERDOT	5	0	0	0	1	0	6	0%
PINOT NOIR	15	0	0	0	0	0	15	0%
SANGIOVESE	0	2	2	0	0	0	4	0%
SHIRAZ	327	63	31	80	46	41	588	7%
TEMPRANILLO	0	0	1	1	6	0	9	0%
OTHER RED	3	0	0	2	0	0	5	0%
TOTAL RED WINEGRAPES	**1215**	**207**	**104**	**238**	**70**	**50**	**1883**	**3%**
WHITE WINEGRAPES								
CHARDONNAY	51	0	7	36	36	27	157	17%
MARSANNE	2	0	0	0	0	0	2	0%
RIESLING	1	0	0	0	0	7	8	83%
SAUVIGNON BLANC	20	0	4	0	0	5	29	17%
SEMILLON	3	3	0	0	0	0	6	0%
VIOGNIER	0	5	0	3	2	0	9	0%
TOTAL WHITE WINEGRAPES	**77**	**7**	**11**	**39**	**37**	**39**	**211**	**18%**
TOTAL ALL VARIETIES	**1293**	**214**	**115**	**277**	**108**	**89**	**2094**	**4%**

WRATTONBULLY TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 14.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for Own	Other	Preferred
RED									
Cabernet Franc	**0**	**0**	**0**	**4**		0%	0	0	1
Cabernet Sauvignon	**6426**	**7912**	**14338**	**11051**	55%	130%	4	15	14
Malbec	**0**	**26**	**26**	**25**	100%	102%	0	1	1
Merlot	**2106**	**1671**	**3777**	**2048**	44%	184%	2	9	9
Meunier	**52**	**0**	**52**	**52**	0%	101%	1	0	1
Other red	**13**	**0**	**13**	**13**	0%	98%	1	0	1
Petit Verdot	**69**	**0**	**69**	**0**	0%		1	0	0
Pinot Noir	**316**	**0**	**316**	**316**	0%	100%	1	0	1
Sangiovese	**71**	**8**	**79**	**81**	10%	98%	1	1	2
Shiraz	**2924**	**4208**	**7132**	**6511**	59%	110%	4	14	15
Tempranillo	**0**	**6**	**6**	**10**	100%	60%	0	1	1
Total RED	**11978**	**13830**	**25809**	**20111**	54%	128%			
WHITE									
Chardonnay	**699**	**981**	**1679**	**1631**	58%	103%	2	8	8
Marsanne	**28**	**0**	**28**	**28**	0%	100%	1	0	1
Riesling	**6**	**0**	**6**	**17**	0%	36%	1	0	1
Sauvignon Blanc	**710**	**30**	**740**	**740**	4%	100%	1	1	2
Semillon	**74**	**0**	**74**	**74**	0%	100%	1	0	1
Viognier	**115**	**0**	**115**	**115**	0%	100%	1	0	1
Total WHITE	**1631**	**1011**	**2642**	**2605**	38%	101%			
Total for region	**13609**	**14841**	**28451**	**22715**					

WRATTONBULLY CROP VALUE DATA - VINTAGE 2004

Table 14.3

Variety	Grower grown	Total crushed (1)	estimated total value: purchased grapes	estimated total value: total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Cabernet Sauvignon	**7912**	**14338**	$10,578,119	$19,168,705	$200	$2,009	**$1,337**	*100%*
Malbec	**26**	**26**	$28,928	$28,928			**$1,130**	*100%*
Merlot	**1671**	**3777**	$2,364,407	$5,345,692	$350	$1,904	**$1,415**	*100%*
Sangiovese	**8**	**79**	$8,000	$79,060			**$1,000**	*100%*
Shiraz	**4208**	**7132**	$5,048,404	$8,557,045	$200	$1,904	**$1,200**	*100%*
Tempranillo	**6**	**6**	$6,000	$6,000			**$1,000**	*100%*
Total RED	**13830**	**25358**	**$18,033,858**	**$33,185,430**				
WHITE								
Chardonnay	**981**	**1679**	$1,431,867	$2,451,912	$800	$2,000	**$1,460**	*100%*
Sauvignon Blanc	**30**	**740**	$45,150	$1,113,249			**$1,505**	*100%*
Total WHITE	**1011**	**2419**	**$1,477,017**	**$3,565,161**				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
(3) This does not include end use bonuses or other adjustments determined post-receival.

WRATTONBULLY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 14.4

	2005		2006		2007		2008		2009	
Variety	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Franc	**7**	**7**	**7**	**7**	**7**	**7**	**7**	**7**	**7**	**7**
Cabernet Sauvignon	**10743**	**9622**	**10980**	**9941**	**10848**	**10296**	**10150**	**10480**	**9334**	**10588**
Malbec	**18**	**18**	**18**	**18**	**18**	**18**	**18**	**18**	**18**	**18**
Merlot	**2804**	**1772**	**2953**	**1860**	**2967**	**1894**	**2826**	**1760**	**2652**	**1586**
Meunier	**32**	**32**	**32**	**32**	**32**	**32**	**0**	**0**	**0**	**0**
Other red	**10**	**10**	**12**	**12**	**12**	**12**	**12**	**12**	**12**	**12**
Petit Verdot	**66**	**0**	**75**	**0**	**75**	**0**	**75**	**0**	**75**	**0**
Pinot Noir	**185**	**185**	**185**	**185**	**185**	**185**	**185**	**185**	**185**	**185**
Sangiovese	**36**	**36**	**36**	**36**	**36**	**36**	**36**	**36**	**36**	**36**
Shiraz	**5691**	**5579**	**6038**	**5740**	**6567**	**5973**	**6109**	**6032**	**5861**	**6061**
Tempranillo	**52**	**52**	**89**	**89**	**89**	**89**	**89**	**89**	**89**	**89**
Total for RED	**19643**	**17313**	**20424**	**17920**	**20836**	**18542**	**19507**	**18619**	**18269**	**18582**
WHITE										
Chardonnay	**1310**	**1152**	**1609**	**1303**	**1514**	**1179**	**1499**	**1119**	**1545**	**1119**
Marsanne	**10**	**10**	**10**	**10**	**10**	**10**	**10**	**10**	**10**	**10**
Riesling	**25**	**25**	**30**	**30**	**35**	**35**	**35**	**35**	**35**	**35**
Sauvignon Blanc	**400**	**400**	**425**	**425**	**425**	**425**	**425**	**425**	**425**	**425**
Semillon	**42**	**42**	**42**	**42**	**42**	**42**	**42**	**42**	**42**	**42**
Viognier	**40**	**40**	**40**	**40**	**40**	**40**	**40**	**40**	**40**	**40**
Total for WHITE	**1827**	**1669**	**2156**	**1850**	**2066**	**1731**	**2051**	**1671**	**2097**	**1671**
Total for region	**21470**	**18982**	**22580**	**19770**	**22902**	**20273**	**21558**	**20290**	**20366**	**20253**

WRATTONBULLY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 2001 - 2009

Figure 14.1

Past production and projections (major varieties)