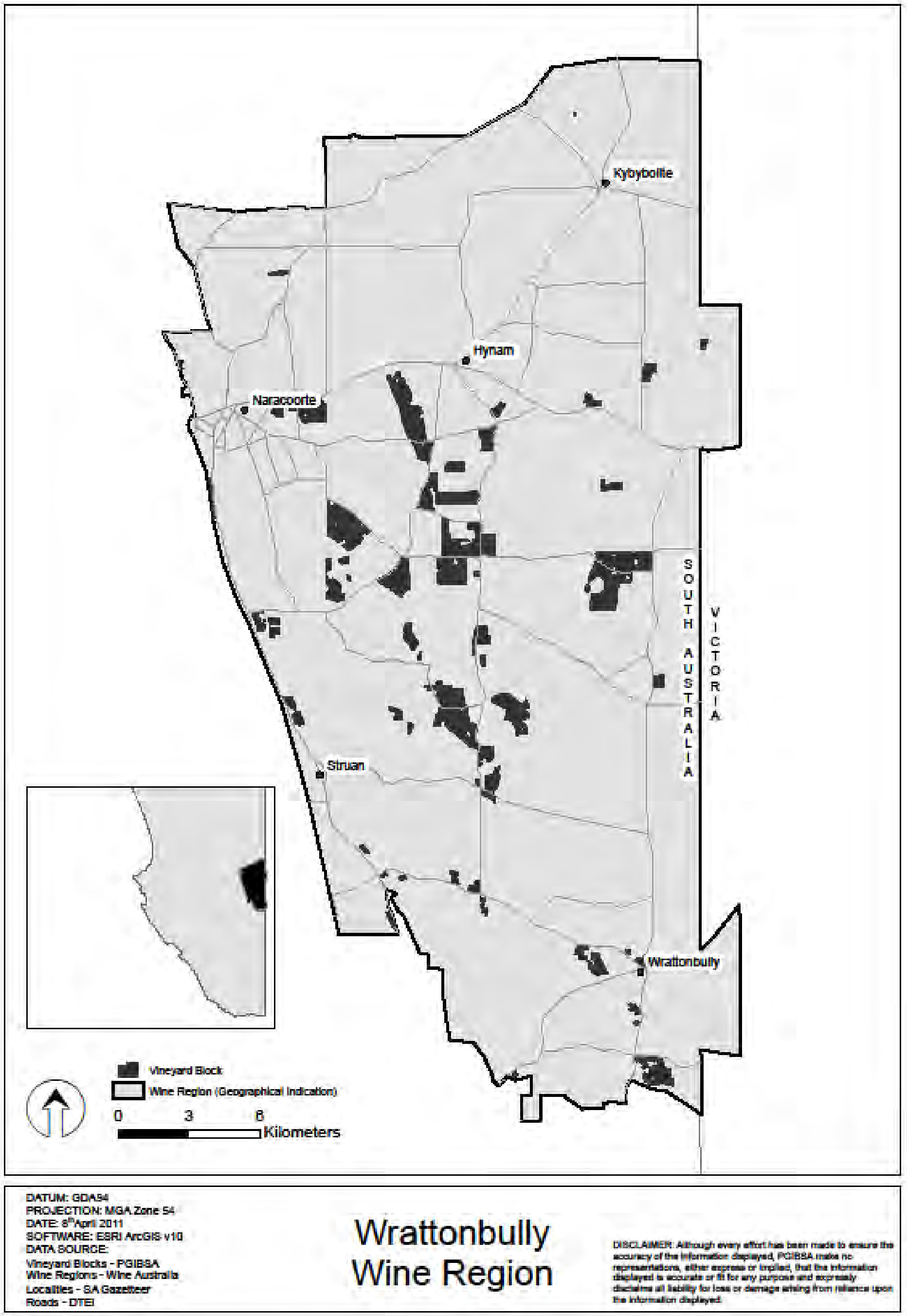

Wrattonbully wine region

Regional summary report

2011

Explanations and Definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from the Board's office.

Total crush

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

Crop value data

On the survey forms, wineries are asked to record **total purchase value.** This is the total amount paid for fruit of a particular variety at the point of receival – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted.

The **calculated average purchase value per tonne** is the average amount paid per tonne of fruit across all wineries. Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements. The **estimated total value of purchased grapes** is calculated by multiplying the average purchase value per tonne by the total tonnes purchased. The **estimated total value of total grapes** is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

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

Important note on average purchase value

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts. Therefore the average price should not be compared directly with an individual grower's arrangement.

Highest and lowest price

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

FORECASTS

Estimated supply

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

Committed intake

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

Explanations and Definitions

Available supply

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

Comparing supply and committed intake

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

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2011 South Australian Utilisation and Pricing Survey of wineries. The information is obtained from the vineyard register maintained by the Phylloxera and Grape Industry Board of South Australia.

The Board is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of grapegrowers in the state. All vineyard owners with more than 0.5 hectares are required by law to register with the Board, and to complete an accurate vineyard return each year, giving details of their plantings. This information is kept strictly confidential. An accurate vineyard register enables the Board to produce complete, up-to-date statistical information on vineyard plantings by variety, year planted and location.

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

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2011 and include all plantings from the 2010 planting season. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the 2011 report compared with previous reports.
2. Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from the Board.
3. Where a 0 appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce a slight error in totals or percentages.

Vintage overview

Vintage report

Considered the most difficult Vintage since plantings were established in the region, 2011 presented challenges for growers with disease outbreaks during the growing season which were extremely hard to manage and not previously experienced on this frequency or scale.

The start of the season was looking particularly promising with no frosts, good soil moisture and general light timely spring rains. However, with continued summer rainfall, vine vigour was an issue, resulting in instances of larger than desired berry size. The ongoing rainfall and high humidity, coupled with few days where the temperature exceeded 30 degrees, canopy sizes were significantly increased on past seasons. These conditions were challenging to growers.

Growers adapted well to this situation with increased canopy manipulation and generally good disease control for Powdery and Downy Mildew. Unfortunately the early rains had an overwhelming impact on latent Botrytis development, which expressed itself within the berry closer to harvest.

Harvest timing was unusual this season as some growers elected to take fruit at lower baume than past season's in an endeavor to pick fruit in sound condition and avoid the many heavy summer storms and associated Botrytis infections.

In summary, the 2011 vintage, as with the past four seasons, produced fruit of excellent quality and should result in wines that are reflective of our region's increasing maturity.

Thomas Davies
Wrattonbully Wine Industries Association

Overview of vintage statistics

The harvest from Wrattonbully was 14,105 tonnes in 2011, down by 61% on the 2010 harvest of 23,292 tonnes. The total value of grapes fell by 53% from $20.1 million in 2010 to $9.5 million. The average purchase value for Cabernet Sauvignon fell significantly by $329 per tonne to $608 tonne, the lowest on published record. Shiraz also fell by $126 to $763 per tonne.

There were no new plantings in Wrattonbully in spring 2010 (including top-working and replacements). The total planted area of vines fell slightly from 2,679 hectares to 2,662 hectares.

The estimated production from Wrattonbully for 2012 is 22,900 tonnes, with 21,300 tonnes already committed to the wineries, so there is not expected to be any surplus fruit.

In 2016, the estimated production is expected to be about the same. 10,400 tonnes is already under contract or winery grown fruit, leaving around 12,500 tonnes as yet uncontracted.

Winegrape intake summary - vintage 2011

Variety	Tonnes purchased	Lowest price[1]	Highest price[1]	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed[2]	Est total value ALL grapes
RED								
Cabernet Sauvignon	3,326	$300	$1,500	$2,022,379	$608	2,754	6,080	$3,697,279
Malbec	33			$17,096	$512	0	33	$17,096
Merlot	1,044	$300	$1,021	$688,873	$660	632	1,676	$1,106,022
Meunier	0			$0	$0	38	38	$25,217
Petit Verdot	4			$4,771	$1,110	0	4	$4,771
Pinot Noir	179	$375	$2,000	$144,391	$808	418	597	$482,047
Sangiovese	0			$0	$0	93	93	$61,196
Shiraz	899	$300	$1,500	$686,247	$763	1,474	2,373	$1,811,369
Tempranillo	70			$94,824	$1,360	8	78	$105,708
Total Red winegrapes	**5,555**			**$3,658,582**		**5,418**	**10,973**	**$7,310,595**
WHITE								
Chardonnay	975	$400	$2,000	$528,638	$542	53	1,029	$557,530
Marsanne	0			$0	$0	14	14	$8,535
Pinot Gris	41			$34,347	$830	1,128	1,169	$970,316
Riesling	83			$57,000	$687	49	132	$90,445
Sauvignon Blanc	292	$450	$900	$210,403	$722	430	721	$520,616
Semillon	0			$0	$0	51	51	$30,500
Viognier	0			$0	$0	16	16	$9,252
Total White winegrapes	**1,391**			**$830,387**		**1,741**	**3,132**	**$2,187,193**
Total All winegrapes	**6,946**			**$4,488,969**		**7,158**	**14,105**	**$9,497,788**

1 Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.

2 It is estimated that the non-response rate for Wrattonbully is 1.6%.

Wrattonbully

Current plantings by variety and year planted

Variety	Current area in hectares					
	Pre-2008	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*
Red winegrapes						
Barbera	1	0	0	0	1	*0%*
Cabernet Franc	1	0	0	0	1	*0%*
Cabernet Sauvignon	1,201	0	5	0	1,206	*0%*
Malbec	4	0	0	0	4	*0%*
Merlot	324	0	0	0	324	*0%*
Meunier (Pinot Meunier)	3	0	0	0	3	*0%*
Petit Verdot	6	0	0	0	6	*0%*
Pinot Noir	25	22	0	0	46	*0%*
Sangiovese	4	0	0	0	4	*0%*
Shiraz	682	4	0	0	686	*0%*
Tempranillo	9	0	0	0	9	*0%*
Total red varieties	**2,259**	**26**	**5**	**0**	**2,290**	***0%***
White winegrapes						
Chardonnay	204	0	0	0	204	*0%*
Marsanne	2	0	0	0	2	*0%*
Pinot Gris	93	0	0	0	93	*0%*
Riesling	7	0	0	0	7	*0%*
Sauvignon Blanc	44	4	2	0	50	*0%*
Semillon	6	0	0	0	6	*0%*
Viognier	11	0	0	0	11	*0%*
Total white varieties	**366**	**4**	**2**	**0**	**372**	***0%***
Total all varieties	**2,625**	**30**	**7**	**0**	**2,662**	***0%***

Wrattonbully

Estimated supply and committed intake 2012 - 2016

Variety	2012 Est Supply [1]	2012 Committed intake[2] Winery grapes	2012 Committed intake[2] Contract purchases	2012 Committed intake[2] Total committed intake	2014 Est Supply [1]	2014 Committed intake[2] Winery grapes	2014 Committed intake[2] Contract purchases	2014 Committed intake[2] Total committed intake	2016 Est Supply [1]	2016 Committed intake[2] Winery grapes	2016 Committed intake[2] Contract purchases	2016 Committed intake[2] Total committed intake
Red winegrapes												
Cabernet Franc	5	5	0	5	5	5	0	5	5	5	0	5
Cabernet Sauvignon	9,629	4,684	4,033	8,717	9,638	4,684	2,876	7,560	9,638	3,559	599	4,158
Malbec	33	0	43	43	34	0	43	43	34	0	0	0
Merlot	2,918	1,698	908	2,605	2,918	1,698	470	2,167	2,918	1,540	198	1,738
Meunier	21	40	0	40	21	40	0	40	21	0	0	0
Petit Verdot	54	72	3	75	54	72	3	75	54	72	3	75
Pinot Noir	318	369	268	637	370	369	281	650	370	0	140	140
Sangiovese	28	48	0	48	28	48	0	48	28	48	0	48
Shiraz	6,504	3,343	2,152	5,495	6,517	3,343	1,458	4,801	6,517	1,838	700	2,538
Tempranillo	72	8	57	65	72	8	57	65	72	8	57	65
Total red winegrapes	**19,593**	**10,266**	**7,463**	**17,730**	**19,667**	**10,266**	**5,186**	**15,453**	**19,667**	**7,070**	**1,698**	**8,768**
White winegrapes												
Chardonnay	1,835	647	877	1,524	1,835	647	613	1,260	1,835	221	214	435
Marsanne	15	27	0	27	15	27	0	27	15	27	0	27
Pinot Gris	836	1,007	121	1,128	836	1,007	121	1,128	836	174	115	289
Riesling	55	45	122	167	55	45	142	187	55	45	152	197
Sauvignon Blanc	382	502	146	649	395	502	90	593	395	502	56	558
Semillon	57	36	0	36	57	36	0	36	57	36	0	36
Viognier	86	63	0	63	86	63	0	63	86	63	0	63
Total white winegrapes	**3,267**	**2,328**	**1,266**	**3,594**	**3,279**	**2,328**	**967**	**3,294**	**3,279**	**1,067**	**538**	**1,605**
All winegrapes	**22,860**	**12,594**	**8,730**	**21,324**	**22,947**	**12,594**	**6,153**	**18,747**	**22,947**	**8,137**	**2,236**	**10,373**

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

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