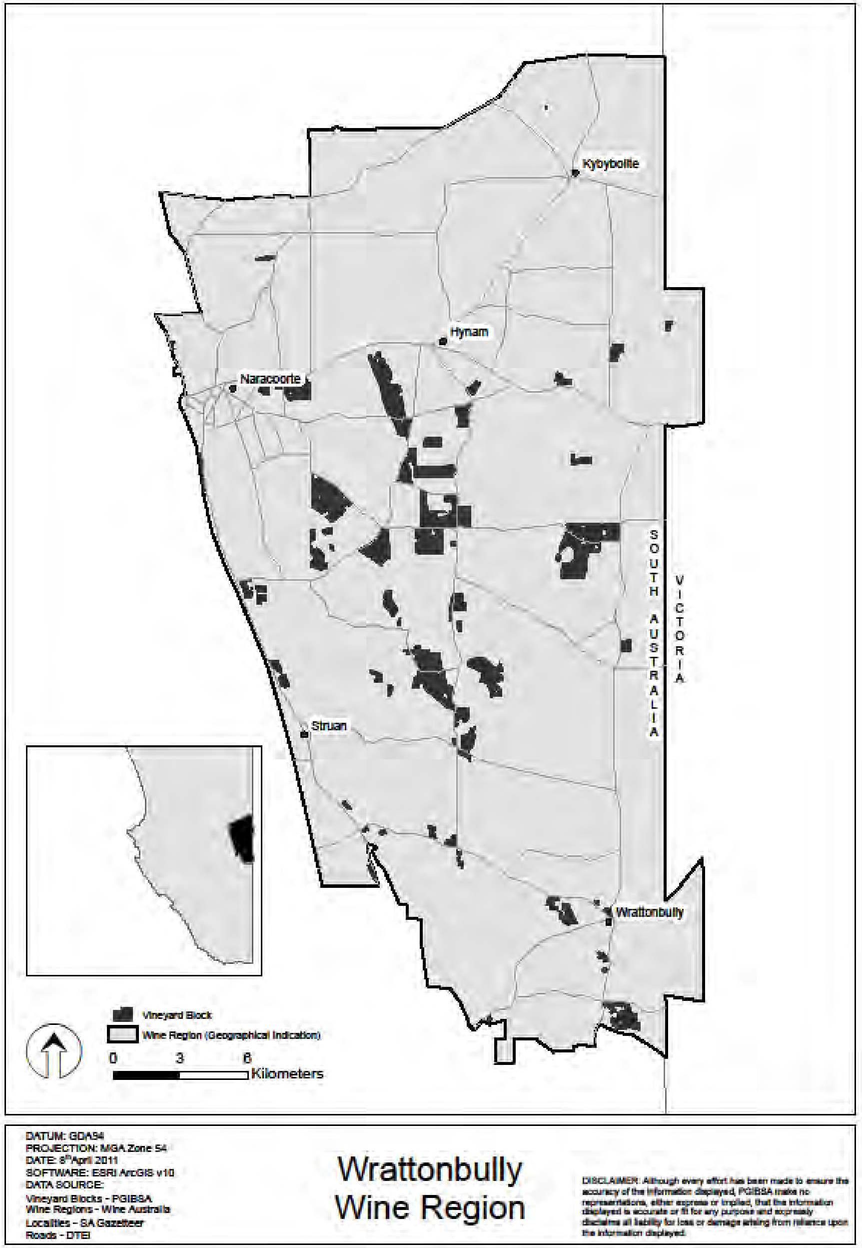

Wrattonbully wine region

Regional summary report

2012

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 2012 South Australian Crush Survey of wineries. The information is obtained from the vineyard register maintained by the Phylloxera and Grape Industry Board of South Australia.

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

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

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2011 and include all plantings from the 2010 planting season. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the 2011 report compared with previous reports.

2. Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from the Board.

3. Where a 0 appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce a slight error in totals or percentages.

Vintage report

Whilst the 2011 vintage will be remembered as the Wrattonbully region's most challenging season to date, the 2012 vintage will be remembered as one of the region's finest. Fruit quality is exceptional from the region this year across all varieties, driven somewhat by slightly below average tonnages for the whites and reds which yielded anywhere between 15-50 percent lower than average.

Following on from the 2011 vintage, 2012 wasn't without its own challenges with good pest and disease management strategies required. The application of careful canopy and fruit management was also necessary to overcome a strong Spring growing season across the blocks in the region.

Minimum temperatures from August to January were slightly up on long term averages, adding to maximum daily temperatures across the months of November, December and January. These were all about 2°C warmer, although there were no heat spikes during this period just warmer days than normal.

Mild temperatures were the greatest influence this season. A warm to hot spell at the end of February was then followed by cooler nights and mild days allowing reds to achieve phenological maturity that aligned with their baumes.

Full soil moisture profiles as a result of good early Winter rains, got the season off to a strong start. Budburst was particularly early this season beginning 2 weeks ahead of normal, with Cabernet Sauvignon an exception, in some cases most likely as a result of late pruning. This trend continued with the vines throughout the season staying about 2 weeks ahead at all key periods right up until harvest.

As with budburst, flowering and fruit set was early, commencing in late October into early November. Fruit set was down compared with previous years especially in the reds with the exception of Merlot which set particularly well and even required thinning in some cases.

Vintage ended with beautiful Autumn sunny days allowing for fruit parcels to be picked at their optimum.

Whites from the region look very strong and have good acid retention due to the lack of intense heat late in the ripening period as is often the case. Sauvignon Blanc's have more passionfruit tropical flavours this season rather than grassy and herbaceous characters. Chardonnay's are showing great promise exhibiting ripe peach, melon and grapefruit flavours. The Merlot's are particularly robust this year with strong colour and full velvety tannins. Shiraz took a while to develop but once they did they had fantastic rounded fruit flavours with smooth tannins to support the palate. Arguably the standout variety was Cabernet Sauvignon. They held their natural acidity, had a wide spectrum of flavours, vibrant colours and full tannins.

Thomas Davies
Wrattonbully Wine Industries Association

Overview of vintage statistics

The harvest from Wrattonbully was 19,052 tonnes in 2012, up by 35% on the 2011 harvest of 14,105 tonnes. The total value of grapes almost doubled by 44.9% from $9.5 million in 2011 to $17.2 million. The average purchase value for the major varieties increased – Cabernet Sauvignon up by $350 per tonne to $958 per tonne, Shiraz up by $173 per tonne to $936 per tonne and Chardonnay up by $133 per tonne to $675 per tonne.

There were 12 hectares new plantings in Wrattonbully in spring 2011 (including top-working and replacements) with 41.7% for both Shiraz and Prosecco. The total planted area of vines remains unchanged at 2,663 hectares.

The estimated production from Wrattonbully for 2013 is 22,800 tonnes, with 21,200 tonnes already committed to the wineries, therefore it is not expected to be any surplus fruit.

In 2017, the estimated production is expected to be about the same. 14,800 tonnes is already under contract or winery grown fruit, leaving around 8,00 tonnes (35%) as yet uncontracted.

Wrattonbully

Winegrape intake summary - vintage 2012

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								
Barbera	9			$9,680	$1,100	0	9	$9,680
Cabernet Sauvignon	3,085	$547	$2,700	$2,954,524	$958	3,082	6,167	$5,906,845
Malbec	49			$35,782	$730	0	49	$35,782
Merlot	1,390	$500	$1,943	$1,215,505	$874	1,615	3,006	$2,627,942
Petit Verdot	2			$2,760	$1,150	57	59	$68,310
Pinot Noir	154	$500	$1,400	$131,719	$857	471	625	$535,662
Sangiovese	0			$0	$0	62	62	$57,470
Shiraz	2,370	$600	$1,943	$2,218,579	$936	3,028	5,397	$5,053,010
Tempranillo	41			$65,760	$1,600	8	49	$77,760
Total Red winegrapes	**7,100**			**$6,634,309**		**8,323**	**15,422**	**$14,372,460**
WHITE								
Chardonnay	1,262	$350	$1,200	$852,085	$675	543	1,806	$1,218,830
Marsanne	0			$0	$0	16	16	$11,192
Pinot Gris	81			$83,724	$1,030	962	1,043	$1,073,765
Riesling	0			$0	$0	64	64	$44,767
Sauvignon Blanc	150	$650	$900	$114,596	$766	396	546	$418,151
Semillon	0			$0	$0	38	38	$26,650
Viognier	60			$35,862	$600	58	118	$70,782
Total White winegrapes	**1,553**			**$1,086,266**		**2,077**	**3,630**	**$2,864,137**
Total All winegrapes	**8,653**			**$7,720,575**		**10,400**	**19,052**	**$17,236,597**

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 1.3%.

Wrattonbully

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2009*	*2009*	*2010*	*2011*	*Total area*	*% planted in 2011*
Red winegrapes						
Cabernet Sauvignon	1,194	5	0	0	1,200	*0%*
Malbec	4	0	0	0	4	*0%*
Merlot	306	0	0	2	308	*1%*
Other red	13	0	0	0	13	*0%*
Petit Verdot	6	0	0	0	6	*0%*
Pinot Noir	64	0	0	0	64	*0%*
Shiraz	662	0	0	5	667	*1%*
Tempranillo	9	0	0	0	9	*0%*
Total red varieties	**2,258**	**5**	**0**	**7**	**2,272**	***0%***
White winegrapes						
Chardonnay	200	0	0	0	200	*0%*
Marsanne	2	0	0	0	2	*0%*
Pinot Gris	93	0	0	0	93	*0%*
Prosecco	0	0	0	5	5	*100%*
Riesling	7	0	0	0	7	*0%*
Sauvignon Blanc	45	2	0	0	47	*0%*
Semillon	5	0	0	0	5	*0%*
Viognier	11	0	0	0	11	*0%*
Total white varieties	**363**	**2**	**0**	**5**	**370**	***1%***
Unknown variety	22	0	0	0	22	*0%*
Total all varieties	**2,642**	**7**	**0**	**12**	**2,663**	***0%***

Wrattonbully

Estimated supply and committed intake 2013 - 2017

	2013				2015				2017			
	Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]		
Variety		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*
Red winegrapes												
Barbera	10	0	0	0	10	0	0	0	10	0	0	0
Cabernet Sauvignon	9,579	4,810	4,119	8,929	9,596	3,994	2,791	6,785	9,596	3,994	1,408	5,403
Malbec	34	0	42	42	34	0	18	18	34	0	18	18
Merlot	2,753	1,605	874	2,479	2,762	1,612	725	2,338	2,762	1,614	680	2,295
Petit Verdot	54	71	4	75	54	71	4	75	54	71	4	75
Pinot Noir	512	605	134	740	512	650	94	745	512	650	70	721
Sangiovese	28	47	0	47	28	47	0	47	28	47	0	47
Shiraz	6,289	3,560	1,375	4,934	6,315	2,946	851	3,797	6,315	2,946	724	3,671
Tempranillo	71	10	52	62	71	10	52	62	71	10	52	62
Total red winegrapes	**19,443**	**10,709**	**6,600**	**17,309**	**19,515**	**9,332**	**4,535**	**13,867**	**19,515**	**9,334**	**2,957**	**12,291**
White winegrapes												
Chardonnay	1,804	760	1,273	2,032	1,804	493	717	1,210	1,804	493	246	739
Marsanne	15	27	0	27	15	27	0	27	15	27	0	27
Other White	130	39	65	104	130	39	98	137	130	39	98	137
Pinot Gris	834	1,009	119	1,128	834	1,009	119	1,128	834	1,009	119	1,128
Riesling	55	66	0	66	55	41	0	41	55	41	0	41
Sauvignon Blanc	369	363	94	457	373	333	34	367	373	333	34	367
Semillon	54	33	0	33	54	33	0	33	54	33	0	33
Viognier	86	51	0	51	86	51	0	51	86	51	0	51
Total white winegrapes	**3,346**	**2,348**	**1,551**	**3,899**	**3,351**	**2,026**	**968**	**2,994**	**3,351**	**2,026**	**497**	**2,523**
All winegrapes	**22,789**	**13,057**	**8,151**	**21,208**	**22,866**	**11,358**	**5,504**	**16,862**	**22,866**	**11,360**	**3,454**	**14,814**

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

[2] A raising factor of 1.002 has been applied to committed intake to allow for non-respondents