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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

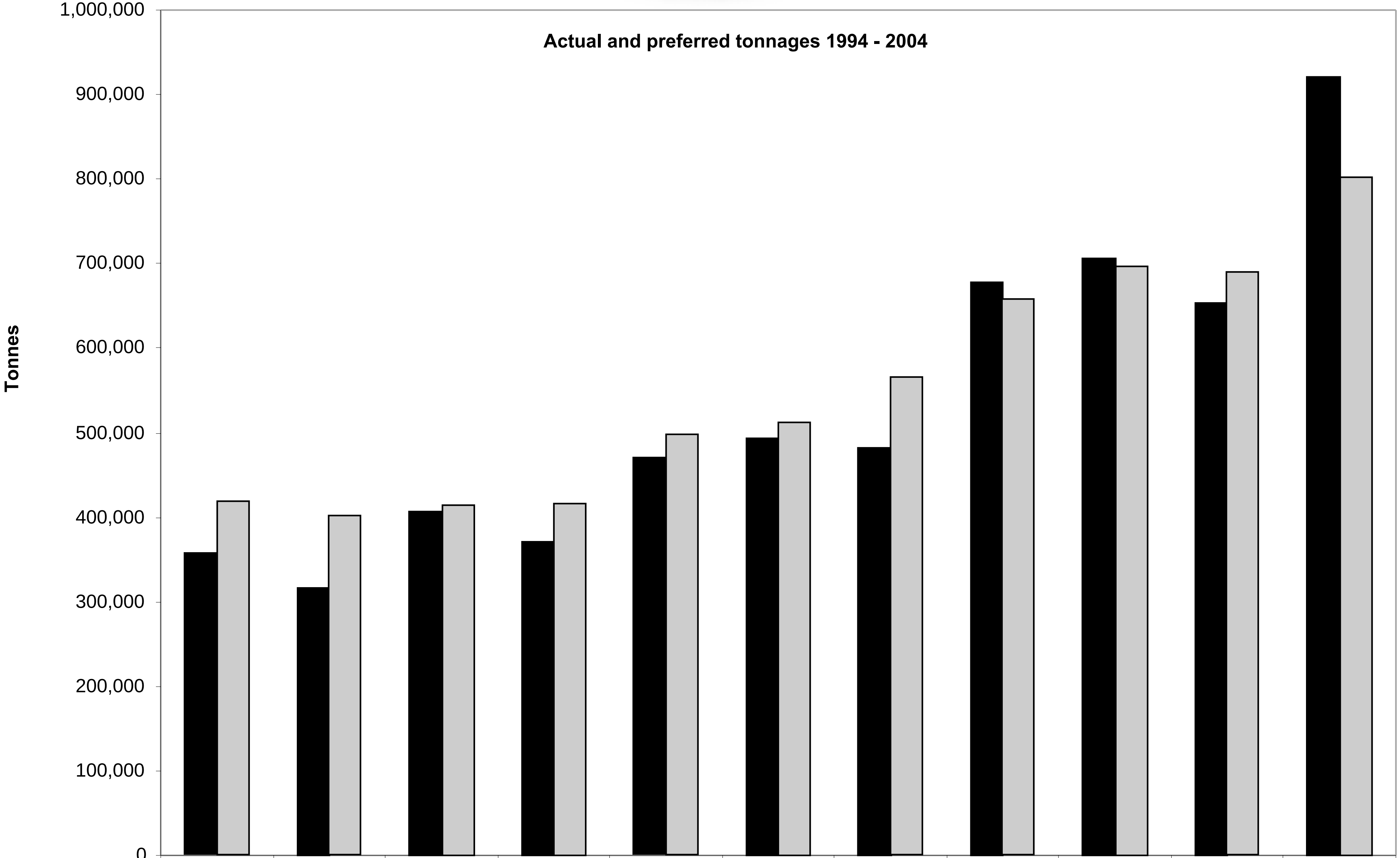
Projected intake for red varieties over the five year forecast period is expected to stabilise at around 600,000 tonnes, with estimated being greater than preferred intake in each year. The oversupply decreases from 85,000 tonnes (14%) in 2005 to 30,000 tonnes (5%) by 2009 *(table 1.6)*. This means that, 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.



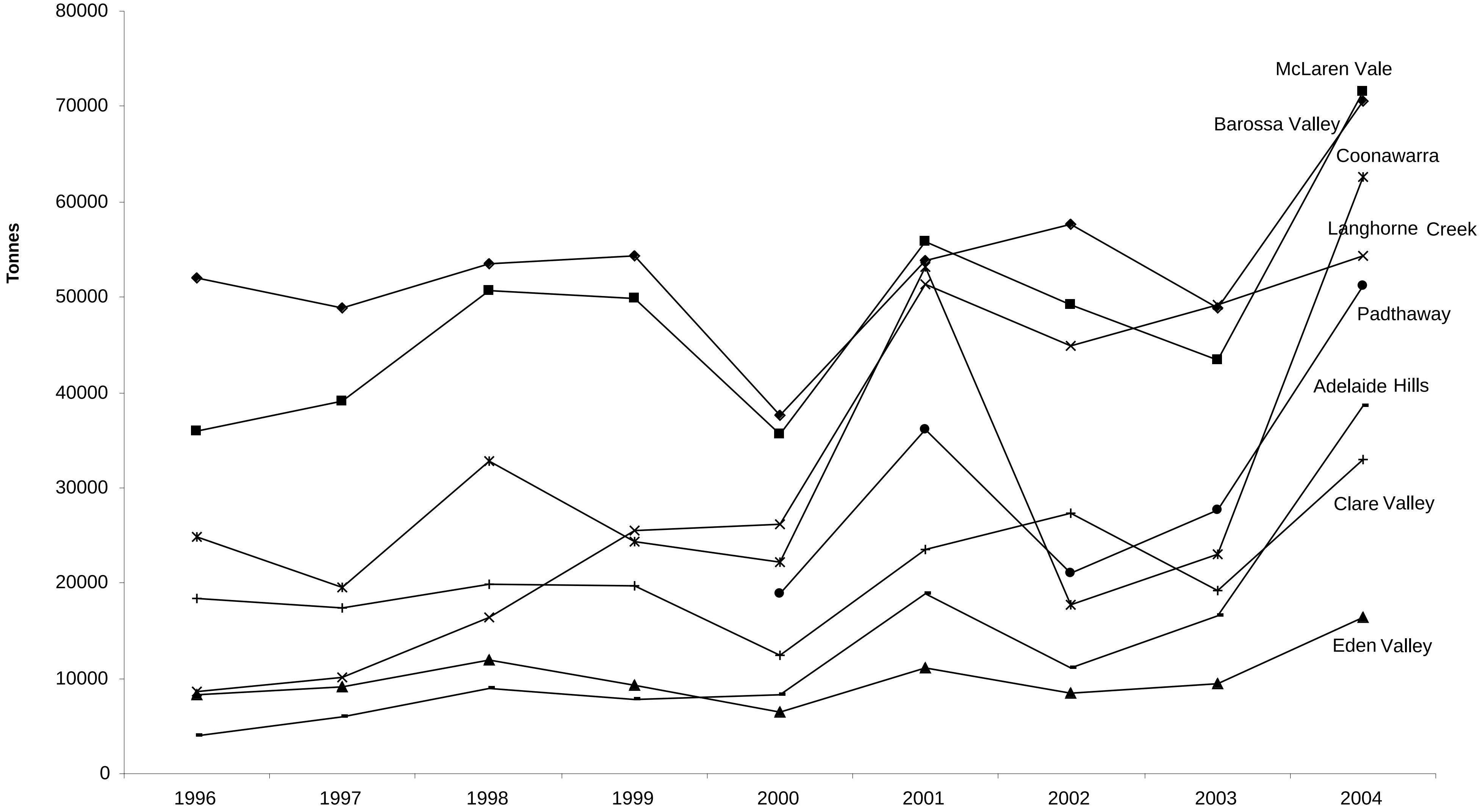
	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
■ Actual usage	357217	315482	406387	371533	471313	494205	482157	678821	707151	653535	920194
□ Preferred usage	418983	401665	414101	416162	497349	511863	565750	657414	696920	689556	802236

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

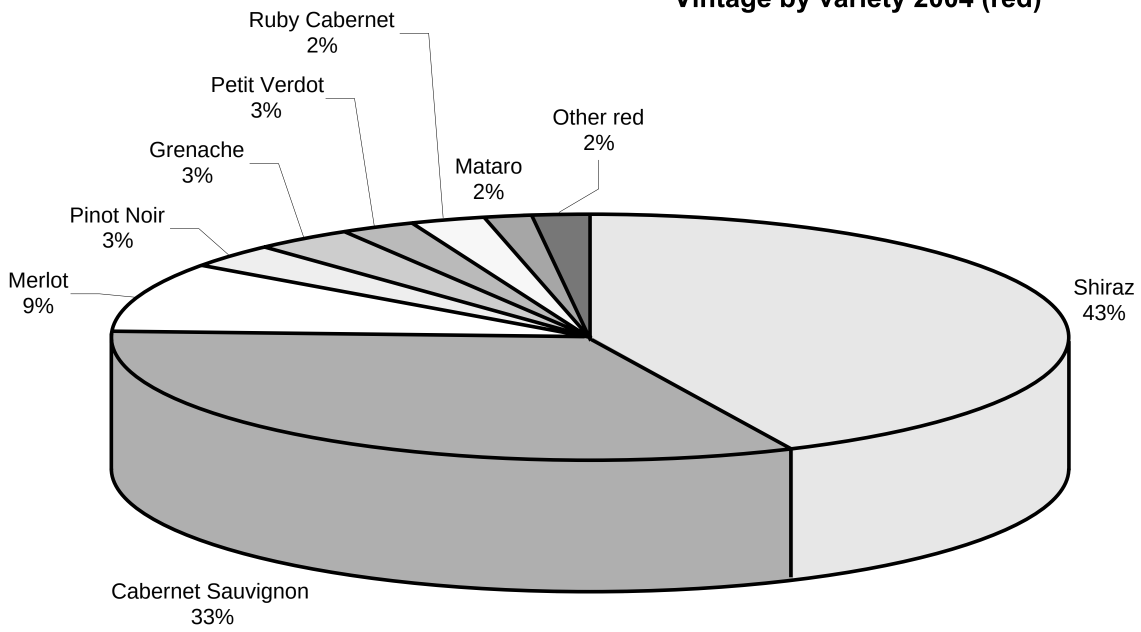
Table 1.2

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 by variety 2004 (red)



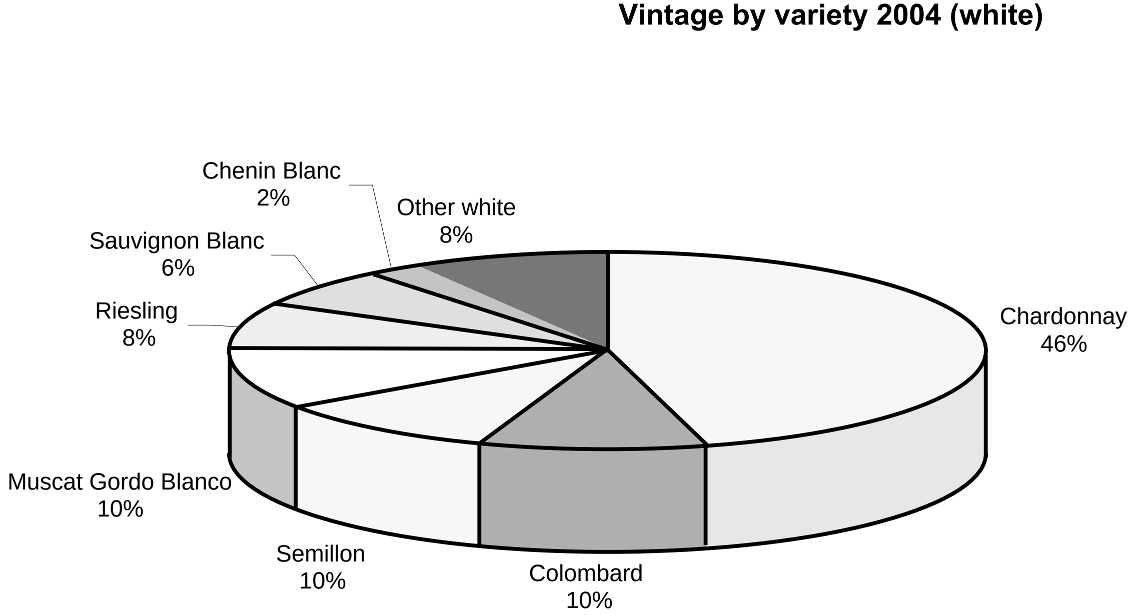
VINTAGE 2004 BY VARIETY - WHITE

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 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

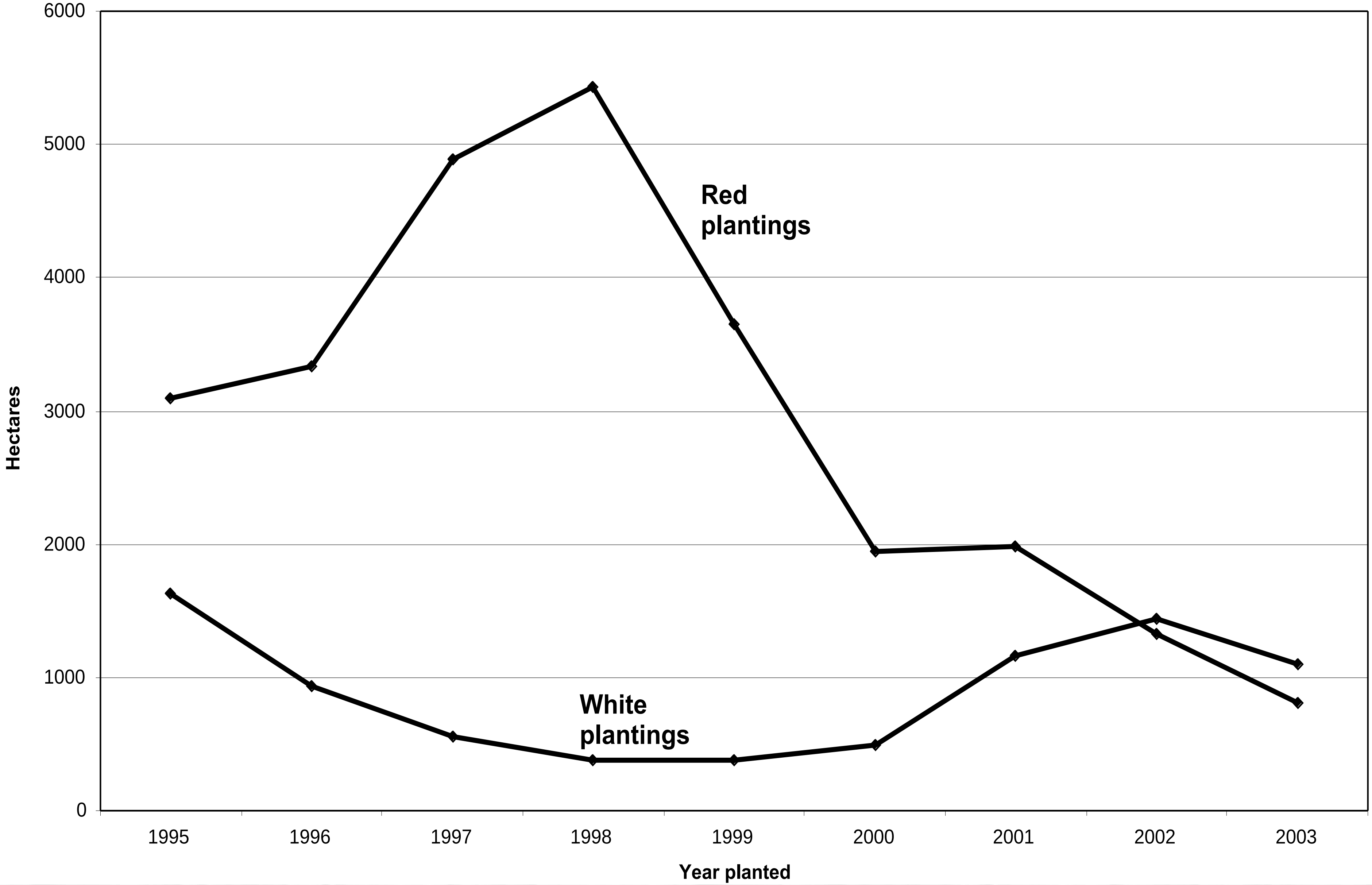
Figure 1.4

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

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*

Table 1.9

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).