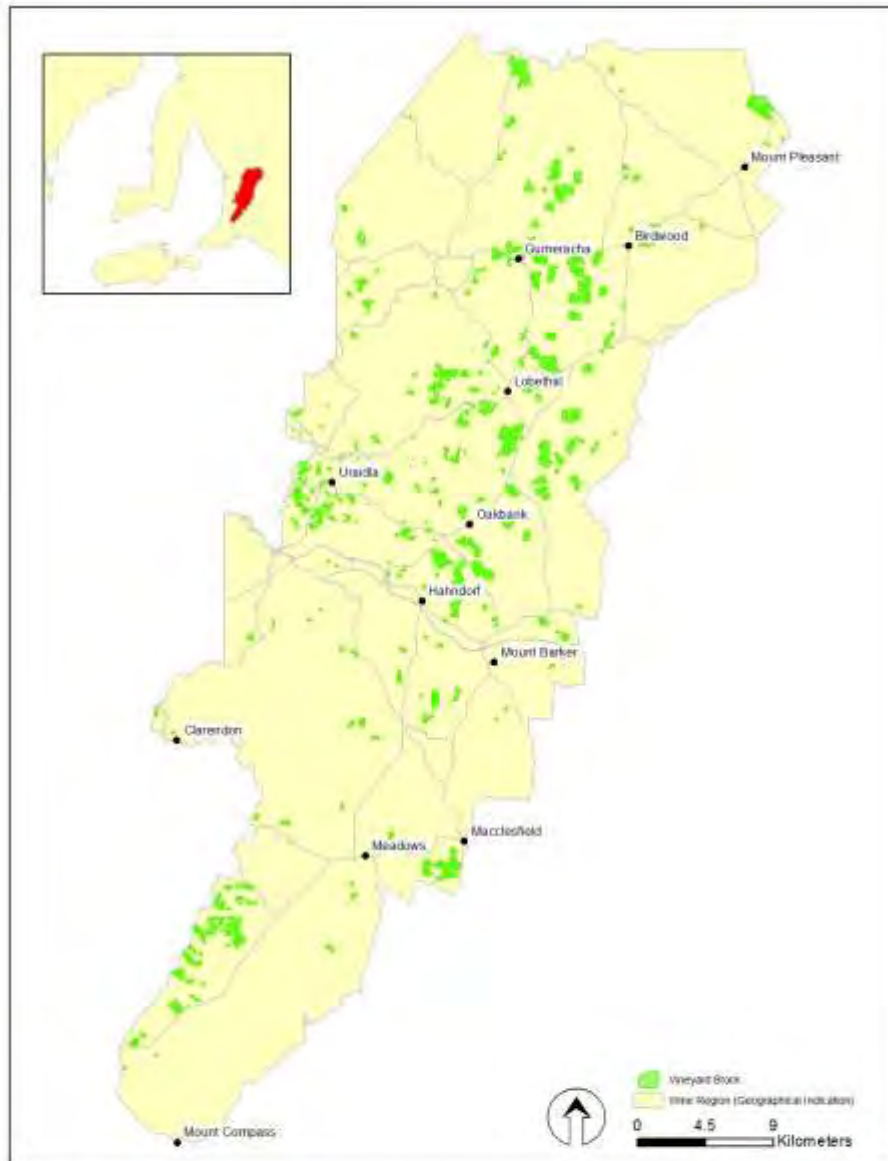


SA Winegrape Crush Survey Regional Summary Report - 2013

Adelaide Hills Wine Region



DATUM - GDA94
PROJECTION - MGA Zone 54
DATE - 30/July 2013
SOFTWARE - ESRI ArcGIS v10.1
DATA SOURCE -
Vineyard Blocks - PGIBSA
Wine Regions - Wine Australia
Localities - SA Gazetteer
Roads - GTE

Adelaide Hills
Wine Region



DISCLAIMER: Although every effort has been made to ensure the accuracy of the information contained, PGIBSA makes no representations, either express or implied, that the information contained is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information contained.

Adelaide Hills

Vintage overview

Vintage report

Leading into September, the Adelaide Hills experienced near average winter rainfall for most parts of the region, resulting in adequate soil moisture profiles for the start of the growing season and weather conditions during this period were close to the long term average. This resulted in budburst occurring in mid-September with the early varieties around September 10 and later varieties 10 – 12 days later, which was in line with the previous vintage, and in line with the long term average.

Weather conditions during spring were mild to warm, encouraging strong canopy development. Constant mild to warm weather continued during November resulting in perfect conditions for flowering. Consequently excellent berry set and bunch development on most varieties, in particular Pinot Gris, Pinot Noir and Sauvignon Blanc.

Leading into summer conditions remained warm and dry with rainfall being lower than average. The warm dry conditions contributed to lower than average disease pressure for Powdery and Downey Mildew and Botrytis. While conditions were favourable for disease control, most growers maintained clean canopies however some growers that were more relaxed on spray programs developed low levels of Powdery Mildew.

Light brown apple moth instars became evident approximately three weeks prior to flowering, nevertheless most vineyards maintained good control of instars from early flowering.

Post veraison, Mealybug was present in moderate to high numbers compared to previous seasons, and Scale was also found in higher numbers. They were mostly seen on Chardonnay and Sauvignon Blanc and contributed to a high incidence of sooty moulds.

Weather conditions remained warm and dry through summer and into the ripening period, February to March.

Most growers reported crop levels to be higher than average especially for Sauvignon Blanc, Pinot Gris, Merlot and Shiraz and to a lesser extent Chardonnay and Pinot noir.

Harvest commenced for sparkling varieties in early February, whereas the early still varieties commenced harvest in late February. Vintage was again condensed and was completed for most wineries by mid April.

In summary vintage 2013 while dry, was a perfect growing season for the Adelaide Hills with the conditions being conducive to low disease pressure, excellent early vine growth and fruit development. While the daytime temperature were warmer than average the nights remained cool resulting in excellent ripening conditions for the aromatic whites and the prolonged warm and dry conditions favoured the later ripening reds.

Murray Leake

Australian Vintage Ltd and Adelaide Hills Wine Region

Overview of vintage statistics

The harvest from the Adelaide Hills was 28,559 tonnes in 2013, up by 11,283 tonnes (65.3%) on the 2012 harvest of 17,276 tonnes. The total value of grapes from the Adelaide Hills increased from \$20.5 million to \$35.7 million (74.1%). The average purchase value for Sauvignon Blanc decreased by \$94 per tonne to \$1,186 per tonne; but Chardonnay rose by \$137 per tonne to \$1,219 per tonne and Pinot Noir also rose by \$254 per tonne to \$1,466 per tonne.

There were 37 hectares of new plantings in the Adelaide Hills in spring 2012 (including top-working and replacements) compared with 38 hectares planted in 2011. Of the new plantings, Sauvignon Blanc accounted for 29.7%, with Pinot Noir and Shiraz both at 16.2% respectively. Since 2008, the total planted area of vines in the region has been decreasing by approximately 1% each year.

The estimated production from the Adelaide Hills region for 2014 is 25,900 tonnes, with the wineries committed intake being approximately the same value contracted. Therefore, it is expected that there will be no surplus fruit available.

In 2018, the estimated production increases slightly to 26,100 tonnes, of which 23,000 tonnes is already under contract or winery grown fruit. This leaves an estimated 3,100 tonnes (11.8%) yet to be contracted or is available on the open market.

Adelaide Hills

Winegrape intake summary - vintage 2013

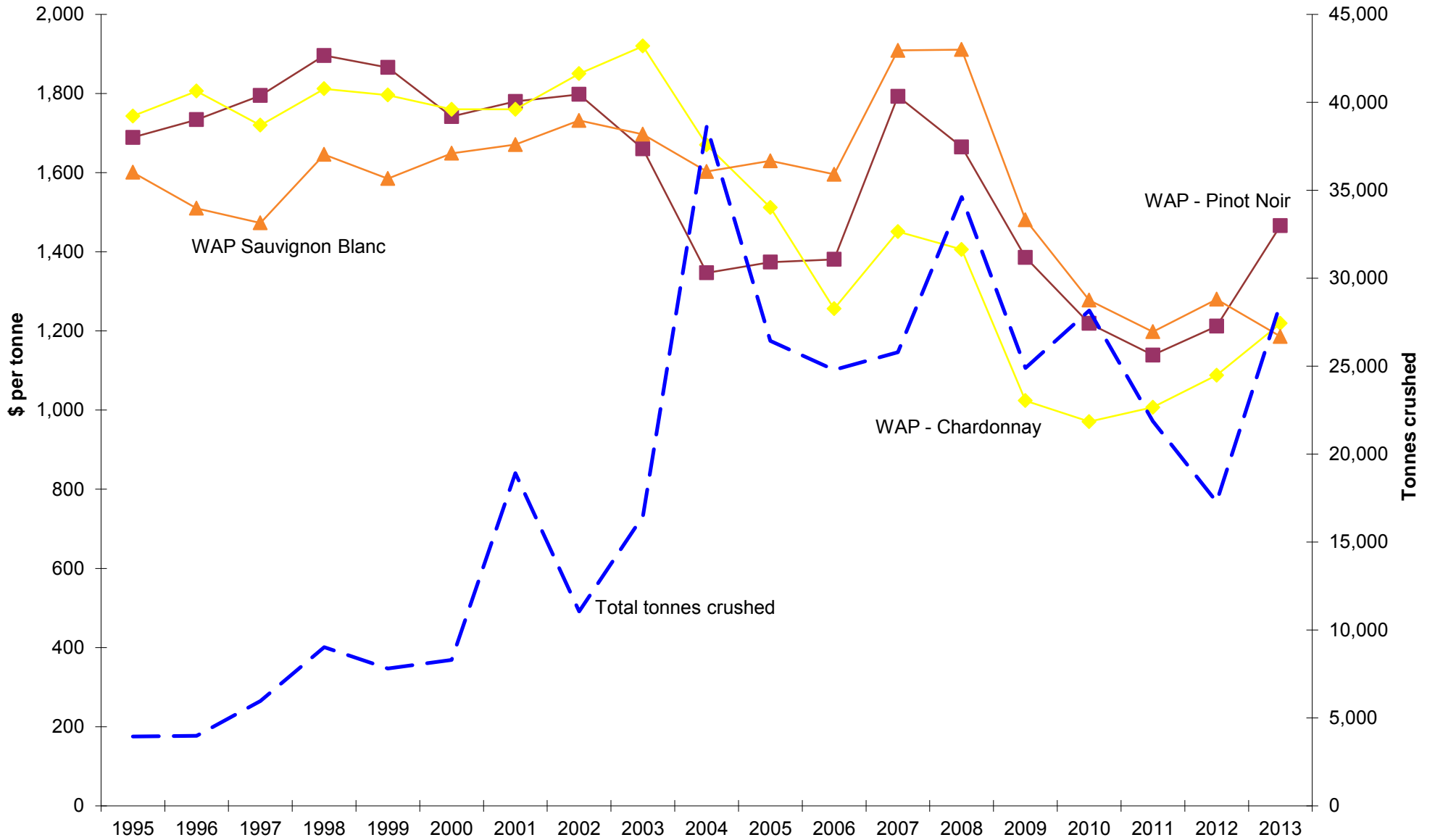
Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
RED								
Cabernet Franc	0			\$0	\$0	8	8	\$10,520
Cabernet Sauvignon	778	\$550	\$2,700	\$984,870	\$1,266	223	1,001	\$1,266,553
Grenache	0			\$0	\$0	3	3	\$4,136
Malbec	5			\$7,500	\$1,500	1	6	\$8,250
Mataro	18			\$18,207	\$999	0	18	\$18,207
Merlot	984	\$300	\$1,821	\$865,032	\$879	171	1,155	\$1,015,781
Meunier	196	\$1,000	\$1,600	\$244,085	\$1,247	0	196	\$244,085
Nebbiolo	20	\$750	\$3,000	\$37,270	\$1,894	16	36	\$67,950
Other red	49	\$1,500	\$2,000	\$70,472	\$1,431	35	84	\$120,382
Petit Verdot	14			\$10,440	\$746	1	15	\$10,962
Pinot Noir	4,252	\$500	\$3,000	\$6,231,520	\$1,466	803	5,055	\$7,409,036
Sangiovese	68	\$1,000	\$1,500	\$73,794	\$1,084	10	78	\$84,635
Shiraz	1,273	\$750	\$3,500	\$2,018,865	\$1,586	492	1,764	\$2,798,741
Tempranillo	40	\$500	\$1,800	\$50,346	\$1,250	32	73	\$90,838
Zinfandel	0			\$0	\$0	9	9	\$12,822
Total Red winegrapes	7,697			\$10,612,401		1,804	9,501	\$13,162,898
WHITE								
Chardonnay	5,062	\$325	\$4,300	\$6,169,661	\$1,219	1,022	6,085	\$7,415,447
Muscat A Petit Grains Blanc	36			\$28,584	\$800	0	36	\$28,584
Other white	132	\$700	\$2,600	\$194,066	\$1,474	61	193	\$284,406
Pinot Gris	1,427	\$750	\$2,500	\$1,860,870	\$1,304	746	2,174	\$2,833,829
Riesling	449	\$500	\$2,000	\$358,774	\$799	133	582	\$465,202
Sauvignon Blanc	5,932	\$250	\$2,125	\$7,038,786	\$1,186	3,240	9,172	\$10,882,826
Semillon	452	\$250	\$1,550	\$315,920	\$699	127	579	\$404,973
Traminer	134	\$700	\$1,650	\$117,458	\$878	11	145	\$127,252
Viognier	51	\$500	\$1,800	\$51,803	\$1,009	41	92	\$93,052
Total White winegrapes	13,676			\$16,135,921		5,382	19,058	\$22,535,572
Grand Total All winegrapes	21,373			\$26,748,322		7,186	28,559	\$35,698,469

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 Adelaide Hills is 8.7%.

Adelaide Hills

Historical Weighted Average Price vs tonnes crushed



Adelaide Hills

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2012
	Pre-2010	2010	2011	2012		
Red winegrapes						
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	209	0	0	3	212	1%
Grenache	2	0	0	0	2	0%
Merlot	177	0	0	0	177	0%
Meunier (Pinot Meunier)	25	0	0	0	25	0%
Nebbiolo	8	0	0	1	10	13%
Other Red	20	1	1	2	25	9%
Petit Verdot	2	0	0	0	2	0%
Pinot Noir	627	15	5	6	653	1%
Sangiovese	9	0	3	0	12	4%
Shiraz	305	9	13	6	333	2%
Tempranillo	22	2	2	2	28	6%
Total red varieties	1,411	28	25	21	1,485	1%
White winegrapes						
Chardonnay	835	0	1	0	836	0%
Muscat A Petit Grains Blanc	1	0	0	0	1	0%
Other White	32	2	9	5	49	10%
Pinot Gris	255	0	3	0	258	0%
Riesling	88	0	0	0	88	0%
Sauvignon Blanc	1,027	1	3	11	1,042	1%
Semillon	75	0	0	0	75	0%
Traminer (Gewurztraminer)	24	0	0	0	24	0%
Verdelho	9	0	0	0	9	0%
Viognier	42	0	0	0	42	0%
Total white varieties	2,388	4	16	17	2,425	1%
Rootstock Block	2	0	0	0	2	0%
Unknown variety	20	0	0	0	20	0%
Total all varieties	3,821	32	41	37	3,931	1%

Adelaide Hills

Estimated supply and committed intake 2014 - 2018

Variety	2014				2016				2018			
	Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²		
		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake
Red winegrapes												
Cabernet Franc	21	9	0	9	21	9	0	9	21	9	0	9
Cabernet Sauvignon	837	224	1,165	1,388	843	245	1,155	1,400	843	282	1,129	1,411
Grenache	11	5	0	5	11	5	0	5	11	5	0	5
Malbec	0	1	5	6	0	1	5	6	0	1	5	6
Mataro	0	0	15	15	0	0	34	34	0	0	34	34
Merlot	885	196	590	787	885	175	565	740	885	175	565	740
Nebbiolo	43	17	34	51	47	19	29	48	47	19	29	48
Other red	279	38	326	364	287	59	110	169	287	59	110	169
Petit Verdot	9	0	21	22	9	0	21	22	9	0	21	22
Pinot Noir	5,119	733	3,970	4,703	5,186	733	3,235	3,969	5,186	702	3,167	3,868
Sangiovese	62	11	129	139	67	11	129	139	67	27	129	155
Shiraz	1,271	518	1,359	1,877	1,305	545	1,404	1,949	1,305	561	1,402	1,963
Tempranillo	97	32	54	86	104	43	36	79	104	43	36	79
Zinfandel	0	10	0	10	0	0	0	0	0	0	0	0
Total red winegrapes	8,634	1,794	7,668	9,462	8,764	1,845	6,723	8,568	8,764	1,882	6,626	8,508
White winegrapes												
Chardonnay	5,014	909	5,817	6,726	5,016	915	5,104	6,019	5,016	920	4,998	5,919
Muscat A Petit Grains Blanc	0	0	0	0	0	0	0	0	0	0	0	0
Other white	301	57	108	164	332	70	105	175	332	71	105	176
Pinot Gris	2,053	860	964	1,824	2,059	888	913	1,802	2,059	903	934	1,837
Riesling	618	99	101	200	618	104	101	205	618	104	101	205
Sauvignon Blanc	8,233	2,481	4,434	6,915	8,286	2,497	3,551	6,047	8,286	2,497	3,275	5,772
Semillon	525	110	406	516	525	110	408	518	525	110	408	518
Traminer	194	11	14	25	194	11	14	25	194	11	14	25
Viognier	251	36	34	70	251	23	34	57	251	23	34	57
Total white winegrapes	17,248	4,563	11,877	16,440	17,340	4,619	10,230	14,849	17,340	4,640	9,869	14,509
All winegrapes	25,882	6,357	19,546	25,902	26,104	6,464	16,953	23,417	26,104	6,523	16,495	23,018

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

² A raising factor of 1.065 has been applied to committed intake to allow for non-respondents