



Adelaide Plains Wine Region

Regional summary report

2012

DATUM: GDA84
 PROJECTION: MGA Zone 54
 DATE: 8th April 2011
 SOFTWARE: ESRI ArcGIS v10
 DATA SOURCE:
 Vineyard Blocks - PGIBSA
 Wine Regions - Wine Australia
 Localities - SA Gazetteer
 Roads - DTEI

Adelaide Plains Wine Region

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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 receipt – 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.

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Vintage overview

Vintage report

This information is related specifically to Primo Estate Vineyards and may not reflect conditions throughout the region.

A relatively dry and warm August, September and October meant bud burst and flowering was earlier than normal. Even though there was no significant disease problems early in the growing season, Primo Estate kept a strict disease monitoring and prevention program to avoid possible problems later in the season, as seen in vintage 2011.

A weak La Nina event in November led to higher than average rainfall during December. Primo Estate continued with its strict disease control program and as a result, no problems were encountered leading up to vintage 2012. The high rainfall in mid-December led to strong canopy growth in all vineyards. Vines looked healthy and lush heading into the New Year. The strong growth of the vines kept them advancing through ripening quicker than the average. Summer 2011/2012 was actually warmer than average despite the perception that it was cooler. Hot weather experienced during January accelerated an already advanced state of vineyard ripening. Harvest started on the 25th January and finished much earlier than normal on 28th February. A cooler than average February meant vineyard ripening slowed down. This took the pressure off winery logistics and allowed fruit scheduling and receipt to operate smoothly. It also meant fruit was able to be harvested at the optimal time.

White varieties from our Virginia vineyards had higher than average yields, while our red varieties were slightly lower than average. The total Adelaide Plains production for Primo Estate was actually higher than 2011.

The quality of the 2012 vintage is very high, quite powerful and has extremely good fruit intensity and flavours.

*Daniel Zuzolo
Primo Estate Wines*

Overview of vintage statistics

The harvest from the Adelaide Plains was 4,458 tonnes, down by 14.3% on the 2011 harvest. The total value of grapes decreased slightly by 8.5% to \$3.1 million. The average purchase value for the major varieties increased slightly, with Shiraz up by \$83 per tonne to \$726 per tonne; , Sauvignon Blanc up by \$80 per tonne to \$761 per tonne and Chardonnay up by \$35 per tonne to \$575 per tonne.

For a third year in a row, there were no new plantings (including top-working and replacements) recorded in the Adelaide Plains region in spring 2011. The total planted area of vines in the region stabilised at 662 hectares.

The estimated production from the Adelaide Plains for 2013 is 5,866 tonnes. The wineries' committed intake is 4,876 tonne, leaving 990 tonnes (16.9%) of uncommitted fruit.

By 2017, the estimated production will remain unchanged at 5,866 tonnes, of which 4,763 tonnes is already under contract or winery grown fruit. This leaves around 1,100 tonnes as yet uncontracted.

Adelaide Plains

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								
Cabernet Sauvignon	273	\$300	\$2,023	\$200,703	\$736	25	297	\$218,788
Grenache	75	\$500	\$900	\$43,014	\$574	40	115	\$65,743
Malbec	0			\$0	\$0	8	8	\$5,407
Mataro	58	\$490	\$750	\$36,172	\$625	0	58	\$36,172
Merlot	445	\$500	\$850	\$302,649	\$680	6	451	\$306,785
Other Red	0			\$0	\$0	23	23	\$16,108
Pinot Noir	159			\$111,244	\$700	0	159	\$111,244
Sangiovese	17			\$20,880	\$1,200	41	58	\$69,792
Shiraz	1,448	\$300	\$1,500	\$1,051,662	\$726	81	1,529	\$1,110,398
Tempranillo	11			\$16,290	\$1,494	0	11	\$16,290
Zinfandel	25			\$13,345	\$530	0	25	\$13,345
Total Red winegrapes	2,511			\$1,795,959		222	2,733	\$1,970,072
WHITE								
Chardonnay	489			\$281,071	\$575	22	511	\$293,836
Chenin Blanc	80			\$15,970	\$200	0	80	\$15,970
Colombard	66			\$38,440	\$582	146	212	\$123,474
Pinot Gris	161			\$161,568	\$1,004	19	180	\$180,735
Riesling	0			\$0	\$0	15	15	\$10,242
Sauvignon Blanc	524			\$398,604	\$761	149	673	\$512,021
Semillon	54			\$28,843	\$530	0	54	\$28,843
Total White winegrapes	1,374			\$924,496		352	1,725	\$1,165,122
Total All winegrapes	3,885			\$2,720,455		574	4,458	\$3,135,194

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 Plains is 17%.

Adelaide Plains

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2011
	Pre-2009	2009	2010	2011		
Red winegrapes						
Cabernet Sauvignon	61	0	0	0	61	0%
Grenache	38	0	0	0	38	0%
Malbec	6	0	0	0	6	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	45	0	0	0	45	0%
Other red	11	0	0	0	11	0%
Pinot Noir	18	0	0	0	18	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	226	0	0	0	226	0%
Tempranillo	2	0	0	0	2	0%
Zinfandel	2	0	0	0	2	0%
Total red varieties	424	0	0	0	424	0%
White winegrapes						
Chardonnay	67	0	0	0	67	0%
Chenin Blanc	5	0	0	0	5	0%
Colombard	12	0	0	0	12	0%
Menindee Seedless	2	0	0	0	2	0%
Muscat Gordo Blanco	2	0	0	0	2	0%
Pinot Gris	26	0	0	0	26	0%
Riesling	15	0	0	0	15	0%
Sauvignon Blanc	54	0	0	0	54	0%
Semillon	8	0	0	0	8	0%
Viognier	16	0	0	0	16	0%
Total white varieties	208	0	0	0	208	0%
Unknown variety	30	0	0	0	30	0%
Total all varieties	662	0	0	0	662	0%

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Estimated supply and committed intake 2013 - 2017

Variety	2013				2015				2017			
	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 Sauvignon	487	41	261	302	487	51	261	312	487	51	261	312
Grenache	306	45	10	56	306	45	0	45	306	50	0	50
Malbec	57	8	0	8	57	8	0	8	57	8	0	8
Mataro	78	0	10	10	78	0	0	0	78	0	0	0
Merlot	361	21	443	463	361	21	458	479	361	21	458	479
Other Red	167	23	0	23	167	23	0	23	167	23	0	23
Pinot Noir	178	0	175	175	178	0	175	175	178	0	175	175
Sangiovese	53	36	0	36	53	36	0	36	53	36	0	36
Shiraz	1,808	92	941	1,033	1,808	99	805	904	1,808	104	805	909
Tempranillo	18	0	15	15	18	0	15	15	18	0	15	15
Zinfandel	0	0	31	31	0	0	31	31	0	0	31	31
Total red winegrapes	3,577	266	1,887	2,152	3,577	283	1,745	2,029	3,577	293	1,745	2,039
White winegrapes												
Chardonnay	674	0	834	834	674	0	834	834	674	0	834	834
Chenin Blanc	52	0	82	82	52	0	82	82	52	0	82	82
Colombard	169	175	67	242	169	175	67	242	169	175	67	242
Pinot Gris	255	10	463	474	255	10	463	474	255	10	463	474
Riesling	154	31	0	31	154	31	0	31	154	31	0	31
Sauvignon Blanc	538	154	844	999	538	154	844	999	538	154	844	999
Semillon	90	0	62	62	90	0	62	62	90	0	62	62
Total white winegrapes	2,289	371	2,353	2,724	2,289	371	2,353	2,724	2,289	371	2,353	2,724
All winegrapes	5,866	636	4,240	4,876	5,866	654	4,098	4,752	5,866	664	4,098	4,763

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

² A raising factor of 1.03 has been applied to committed intake to allow for non-respondents