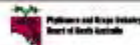


SA Winegrape Crush Survey Regional Summary Report - 2013

Adelaide Plains Wine Region

DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 26 July 2013
SOFTWARE: ESRI ArcGIS v10.1
DATA SOURCE:
Vineyard Blocks - PGIBSA
Wine Regions - Wine Australia
Localities - SA Gazetteer
Roads - GTE

Adelaide Plains
Wine Region



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Adelaide Plains

Vintage overview

Overview of vintage statistics

The harvest from the Adelaide Plains was 3,870 tonnes, down by 588 tonnes (13.2%) on the 2012 harvest of 4,458 tonnes. The total value of grapes decreased slightly from \$3.1 million to \$3.0 million. The average purchase value for Shiraz was up by \$171 per tonne to \$847 per tonne, Sauvignon Blanc down by \$27 per tonne to \$734 per tonne and Chardonnay up by \$87 per tonne to \$662 per tonne.

There were minimal new plantings (including top-working and replacements) recorded in the Adelaide Plains in spring 2012. Since 2008, the total area of vines in the region continues to decrease slightly each year. In 2012, the total area of vines was 657 hectares compared with 744 hectares in 2008; which is a decrease of 11.7%.

The estimated production from the Adelaide Plains for 2014 is 5,806 tonnes, with the wineries' committed intake being 4,243 tonnes. This leaves around 1,560 tonnes (26.9%) of uncommitted fruit.

By 2018, the estimated production will remain unchanged at approximately 5,800 tonnes, of which 4,069 tonnes is already under contract or winery grown fruit. This leaves an estimated 1,700 tonnes (30%) yet to be contracted or is available on the open market.

Adelaide Plains

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 Sauvignon	304	\$700	\$1,952	\$275,361	\$906	9	313	\$283,914
Grenache	46	\$300	\$880	\$20,770	\$449	26	72	\$32,492
Malbec	6			\$3,000	\$497	6	12	\$5,990
Mataro	72	\$900	\$1,100	\$74,660	\$1,040	0	72	\$74,660
Merlot	327	\$500	\$1,000	\$217,104	\$664	12	339	\$225,004
Other red	0			\$0	\$0	16	16	\$13,055
Pinot Noir	155	\$405	\$900	\$117,129	\$758	0	155	\$117,129
Shiraz	1,389	\$500	\$1,500	\$1,176,139	\$847	26	1,415	\$1,198,331
Tempranillo	14			\$20,850	\$1,500	0	14	\$20,850
Zinfandel	23			\$12,126	\$530	0	23	\$12,126
Total Red winegrapes	2,335			\$1,917,139		96	2,431	\$1,983,551
WHITE								
Chardonnay	487	\$480	\$1,200	\$322,442	\$662	0	487	\$322,442
Chenin Blanc	17			\$3,887	\$230	0	17	\$3,887
Muscat Gordo Blanco	13			\$7,560	\$600	0	13	\$7,560
Pinot Gris	269	\$405	\$1,200	\$259,684	\$966	0	269	\$259,684
Riesling	35			\$8,027	\$230	0	35	\$8,027
Sauvignon Blanc	576	\$630	\$1,200	\$422,931	\$734	0	576	\$422,931
Semillon	43			\$22,642	\$530	0	43	\$22,642
Total White winegrapes	1,439			\$1,047,173		0	1,439	\$1,047,173
Grand Total All winegrapes	3,774			\$2,964,312		96	3,870	\$3,030,724

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 2.1%.

Adelaide Plains

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 Sauvignon	61	0	0	0	61	0%	
Grenache	35	0	0	0	35	0%	
Malbec	6	0	0	0	6	0%	
Mataro (Mourvedre)	9	0	0	0	9	0%	
Merlot	44	0	0	1	45	2%	
Other Red	11	0	0	0	11	0%	
Pinot Noir	18	0	0	0	18	0%	
Sangiovese	6	0	0	0	6	0%	
Shiraz	225	0	0	0	225	0%	
Tempranillo	2	0	0	0	2	0%	
Zinfandel	2	0	0	0	2	0%	
Total red varieties	419	0	0	1	420	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%	
Other White	21	0	0	0	21	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%	
Total white varieties	207	0	0	0	207	0%	
Unknown variety	30	0	0	0	30	0%	
Total all varieties	656	0	0	1	657	0%	

Adelaide Plains

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 Sauvignon	487	15	242	257	487	15	242	257	487	15	225	240
Grenache	279	23	49	72	279	23	49	72	279	23	49	72
Malbec	0	8	8	16	0	8	8	16	0	8	8	16
Mataro	78	0	25	25	78	0	25	25	78	0	25	25
Merlot	353	15	392	407	357	15	392	407	357	15	392	407
Other red	290	15	0	15	290	15	0	15	290	15	0	15
Pinot Noir	178	0	171	171	178	0	171	171	178	0	171	171
Shiraz	1,801	72	1,266	1,338	1,801	72	1,242	1,314	1,801	72	1,109	1,181
Tempranillo	0	0	15	15	0	0	15	15	0	0	15	15
Zinfandel	0	0	30	30	0	0	30	30	0	0	30	30
Total red winegrapes	3,520	149	2,199	2,348	3,524	149	2,175	2,324	3,524	149	2,025	2,174
White winegrapes												
Chardonnay	674	0	744	744	674	0	744	744	674	0	744	744
Muscat Gordo Blanco	0	0	25	25	0	0	25	25	0	0	25	25
Pinot Gris	255	0	523	523	255	0	523	523	255	0	523	523
Sauvignon Blanc	538	0	543	543	538	0	543	543	538	0	543	543
Semillon	90	0	60	60	90	0	60	60	90	0	60	60
Total white winegrapes	2,286	0	1,895	1,895	2,286	0	1,895	1,895	2,286	0	1,895	1,895
All winegrapes	5,806	149	4,094	4,243	5,810	149	4,070	4,219	5,810	149	3,920	4,069

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

² A raising factor of 1.005 has been applied to committed intake to allow for non-respondents