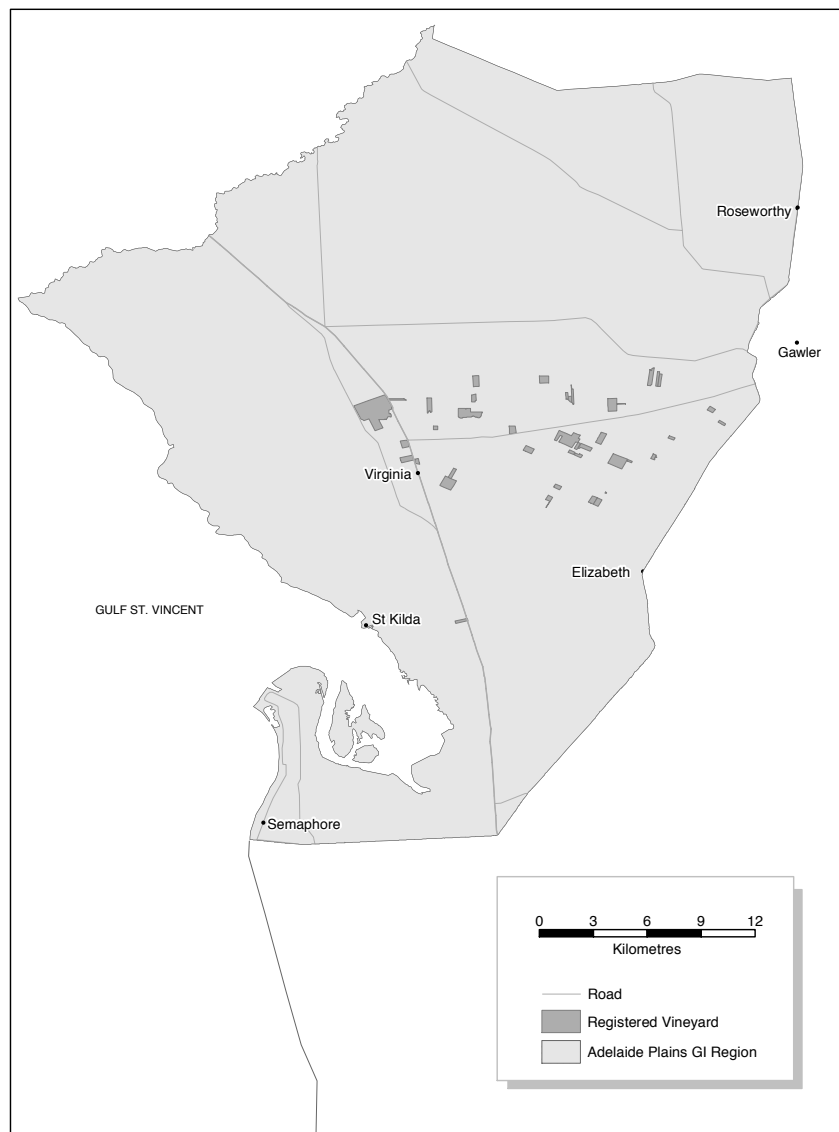


# Adelaide Plains

## ADELAIDE PLAINS VINTAGE OVERVIEW



### Vintage report

Vintage 2005 on the Adelaide Plains began straight after Australia Day - the last week of January.

The vineyards on the red soils in the eastern part of the region are always the first to ripen, with growers on the black soils towards the sea commencing harvest a couple of weeks later.

Most varieties averaged lower yields – particularly Chardonnay, Sangiovese, Petit Verdot and Grenache.

Shiraz, which consistently does well on the Adelaide Plains, showed “great colour and good fruit flavours” according to winemakers. The low rainfall during the 2004 growing season, and cool conditions during the ripening period led to the production of small berries, with good colour.

The winter and spring rains helped maintain adequate moisture levels for deep-rooted old vines. The warm to moderate December and January temperatures, with drier than average conditions gave the vines a tremendous boost for another intense quality vintage, with disease-free canopies and bunches. There were no last minute weather tantrums and vintage for the entire region was done and dusted within a three to four week timeframe.

Heather Ceravolo

Hon Secretary, Adelaide Plains Wine Region Inc

### Overview of vintage statistics

The reported crush for the Adelaide Plains in 2005 was 7,688 tonnes. This was 10% more than in 2004. Despite the record crush, there was only a very small surplus of red and white varieties, compared with the wineries’ preferred intake. However, there were further reductions in the average purchase value of the fruit – with Shiraz down by around \$70 per tonne, and Chardonnay by nearly \$200 per tonne. Despite this, income to growers overall was slightly higher, because of the increased tonnages.

The forecast is for intake of red varieties to decline to less than 2,000 tonnes, while whites remain at around 2,300 tonnes. The expected intake of red varieties has been revised downward by 1,000 tonnes – or over one third – since last year’s forecasts.

There was virtually no new planting in the region in 2004. Production estimates for 2006 and 2008 suggest a substantial surplus in red varieties, and to a lesser extent white varieties, compared with intake requirements.

## ADELAIDE PLAINS TONNES CRUSHED BY VARIETY - VINTAGE 2005

Table 3.1

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (>0) for		
							Own	Other	Preferred
<b>RED</b>									
Cabernet Sauvignon	44	664	708	687	94%	103%	4	7	10
Grenache	0	514	514	327	100%	157%	0	6	4
Malbec	0	69	69	0	100%		0	1	0
Mataro	0	68	68	43	100%	159%	0	2	1
Merlot	65	509	574	575	89%	100%	2	4	6
Petit Verdot	0	16	16	20	100%	82%	0	1	1
Pinot Noir	0	290	290	290	100%	100%	0	1	1
Ruby Cabernet	11	5	16	11	32%	146%	1	1	1
Sangiovese	0	71	71	18	100%	396%	0	2	1
Shiraz	135	2,168	2,302	2,308	94%	100%	4	9	12
<b>Total RED</b>	<b>254</b>	<b>4,375</b>	<b>4,629</b>	<b>4,279</b>	<b>95%</b>	<b>108%</b>			
<i>% of grand total</i>			60%	59%					
<b>WHITE</b>									
Chardonnay	56	1,480	1,535	1,475	96%	104%	2	5	7
Chenin Blanc	0	80	80	17	100%	470%	0	2	1
Colombard	0	124	124	124	100%	100%	0	2	2
Muscat Gordo Blanco	0	16	16	25	100%	64%	0	1	1
Riesling	28	159	187	179	85%	105%	1	2	3
Sauvignon Blanc	0	581	581	555	100%	105%	0	4	4
Semillon	0	364	364	401	100%	91%	0	2	2
Verdelho	9	0	9	9	0%	100%	1	0	1
Viognier	0	162	162	162	100%	100%	0	1	1
<b>Total WHITE</b>	<b>93</b>	<b>2,966</b>	<b>3,059</b>	<b>2,948</b>	<b>97%</b>	<b>104%</b>			
<i>% of grand total</i>			40%	41%					

## ADELAIDE PLAINS CROP VALUE DATA - VINTAGE 2005

Table 3.2

Variety	Grower grown (t)	Total crushed (t)	Estimated total value purchased grapes	Estimated total value total grapes	Lowest price <sup>1</sup>	Highest price	Calc average purchase value per tonne	qualifier <sup>2</sup>
<b>RED</b>								
Cabernet Sauvignon	664	708	\$530,283	\$565,178	\$445	\$2,025	\$798	94%
Grenache	514	514	\$249,442	\$249,442	\$180	\$800	\$485	100%
Malbec	69	69	\$17,310	\$17,310			\$250	100%
Mataro	68	68	\$59,040	\$59,040			\$873	100%
Merlot	509	574	\$403,698	\$455,223	\$400	\$903	\$793	96%
Petit Verdot	16	16	\$13,120	\$13,120			\$800	100%
Pinot Noir	290	290	\$239,483	\$239,483			\$826	100%
Ruby Cabernet	5	16	\$2,555	\$8,055			\$500	100%
Sangiovese	71	71	\$26,580	\$26,580			\$373	100%
Shiraz	2,168	2,302	\$1,684,826	\$1,789,435	\$180	\$2,114	\$777	97%
<b>Total RED</b>	<b>4,375</b>	<b>4,629</b>	<b>\$3,226,337</b>	<b>\$3,422,865</b>				
<b>WHITE</b>								
Chardonnay	1,480	1,535	\$1,454,353	\$1,509,000	\$450	\$1,238	\$983	100%
Chenin Blanc	80	80	\$38,684	\$38,684			\$484	100%
Colombard	124	124	\$83,345	\$83,345			\$670	100%
Muscat Gordo Blanco	16	16	\$8,000	\$8,000			\$500	100%
Riesling	159	187	\$103,134	\$121,278			\$648	100%
Sauvignon Blanc	581	581	\$497,418	\$497,418	\$570	\$1,050	\$856	100%
Semillon	364	364	\$205,314	\$205,314			\$564	100%
Verdelho	0	9	\$0	\$7,946			\$0	
Viognier	162	162	\$228,568	\$228,568			\$1,410	100%
<b>Total WHITE</b>	<b>2,966</b>	<b>3,059</b>	<b>\$2,618,816</b>	<b>\$2,699,553</b>				
<b>Total all varieties</b>	<b>7,341</b>	<b>7,688</b>	<b>\$5,845,153</b>	<b>\$6,122,417</b>				

<sup>1</sup> The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

<sup>2</sup> This indicates the percentage of purchased fruit for which pricing information was supplied.



## ADELAIDE PLAINS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2006 TO 2010

Table 3.3

Variety	2006			2007			2008			2009			2010		
	estimated	preferred	qualifier <sup>1</sup>	estimated	preferred	qualifier	estimated	preferred	qualifier	estimated	preferred	qualifier	estimated	preferred	qualifier
<b>RED</b>															
Cabernet Sauvignon	398	394	91%	398	394	91%	285	281	40%	165	161	23%	165	161	23%
Grenache	183	43	63%	167	27	60%	140	0	18%	0	0	0%	0	0	0%
Malbec	75	0	100%	75	0	100%	75	0	100%	0	0	0%	0	0	0%
Mataro	60	20	100%	60	20	100%	40	0	37%	40	0	37%	40	0	37%
Merlot	529	529	96%	538	538	96%	433	433	72%	383	383	63%	383	383	63%
Petit Verdot	20	20	100%	20	20	100%	20	20	100%	20	20	100%	20	20	100%
Pinot Noir	274	274	100%	289	289	100%	289	289	100%	289	289	100%	289	289	100%
Ruby Cabernet	10	10	68%	10	10	68%	10	10	68%	10	10	68%	10	10	68%
Sangiovese	68	18	100%	68	18	100%	68	18	100%	18	18	22%	18	18	22%
Shiraz	1,499	1,442	91%	1,422	1,365	91%	1,054	998	37%	804	798	25%	804	798	25%
<b>Total RED</b>	<b>3,116</b>	<b>2,750</b>		<b>3,047</b>	<b>2,681</b>		<b>2,414</b>	<b>2,049</b>		<b>1,729</b>	<b>1,679</b>		<b>1,729</b>	<b>1,679</b>	
<b>WHITE</b>															
Chardonnay	1,122	1,122	67%	1,046	1,046	67%	1,058	1,008	50%	1,008	1,008	45%	1,008	1,008	45%
Colombard	80	80	89%	80	80	89%	80	80	89%	80	80	89%	80	80	89%
Muscat Gordo Blanco	25	25	100%	25	25	100%	25	25	100%	25	25	100%	25	25	100%
Riesling	184	184	100%	184	184	100%	184	109	100%	109	109	56%	109	109	56%
Sauvignon Blanc	554	554	81%	724	724	81%	849	849	81%	794	794	67%	794	794	67%
Semillon	45	45	61%	45	45	61%	45	45	61%	45	45	61%	45	45	61%
Verdelho	9	9	100%	12	12	100%	15	15	100%	16	16	100%	16	16	100%
Viognier	200	200	100%	200	200	100%	200	200	100%	200	200	100%	200	200	100%
<b>Total WHITE</b>	<b>2,219</b>	<b>2,219</b>		<b>2,316</b>	<b>2,316</b>		<b>2,456</b>	<b>2,331</b>		<b>2,277</b>	<b>2,277</b>		<b>2,277</b>	<b>2,277</b>	
<b>Total all varieties</b>	<b>5,335</b>	<b>4,969</b>		<b>5,363</b>	<b>4,997</b>		<b>4,870</b>	<b>4,380</b>		<b>4,006</b>	<b>3,956</b>		<b>4,006</b>	<b>3,956</b>	

<sup>1</sup> This indicates the percentage of crushed fruit in the current vintage for which forecast intake data was supplied.

## ADELAIDE PLAINS SUPPLY AND DEMAND FORECASTS 2006 AND 2008

Table 3.4

Variety	2006					2008				
	estimated bearing area (ha) <sup>1</sup>	estimated production (tonnes) <sup>2</sup>	preferred intake (tonnes) <sup>3</sup>	Difference (tonnes)	% difference	estimated bearing area (ha) <sup>1</sup>	estimated production (tonnes) <sup>2</sup>	preferred intake (tonnes) <sup>3</sup>	Difference (tonnes)	% difference
Cabernet Sauvignon	62	930	394	536	58%	62	930	281	649	70%
Grenache	28	420	43	377	90%	28	420	0	420	100%
Malbec	7	105	0	105	100%	7	105	0	105	100%
Mataro	4	60	20	40	67%	4	60	0	60	100%
Merlot	43	645	529	116	18%	43	645	433	212	33%
Petit Verdot	2	30	20	10	33%	2	30	20	10	33%
Pinot Noir	18	270	274	-4	-1%	18	270	289	-19	-7%
Ruby Cabernet	6	90	10	80	89%	6	90	10	80	89%
Sangiovese	6	90	18	72	80%	6	90	18	72	80%
Shiraz	180	2700	1,442	1,258	47%	180	2700	998	1,702	63%
Other red	7	105	0	105	100%	6	90		90	100%
<b>Red Total</b>	<b>363</b>	<b>5445</b>	<b>2,750</b>	<b>2,695</b>	<b>50%</b>	<b>362</b>	<b>5430</b>	<b>2,049</b>	<b>3,381</b>	<b>62%</b>
Chardonnay	68	1156	1,122	34	3%	90	1530	1,008	522	34%
Colombard	8	136	80	56	41%	10	170	80	90	53%
Muscat Gordo Blanco	3	51	25	26	51%	3	51	25	26	51%
Riesling	17	289	184	105	36%	17	289	109	180	62%
Sauvignon Blanc	31	527	554	-27	-5%	54	918	849	69	8%
Semillon	9	153	45	108	71%	9	153	45	108	71%
Verdelho	1	17	9	8	47%	1	17	15	2	12%
Viognier	16	272	200	72	26%	16	272	200	72	26%
Other white	6	102	0	102	100%	6	102		102	100%
<b>White Total</b>	<b>159</b>	<b>2703</b>	<b>2,219</b>	<b>484</b>	<b>18%</b>	<b>206</b>	<b>3502</b>	<b>2,331</b>	<b>1,171</b>	<b>33%</b>
<b>Grand Total</b>	<b>522</b>	<b>8148</b>	<b>4,969</b>	<b>3,179</b>	<b>39%</b>	<b>568</b>	<b>8932</b>	<b>4,380</b>	<b>4,552</b>	<b>51%</b>

*This table compares estimated future production (supply) - based on planting data - with estimated future demand (preferred intake). This gives a better indication of possible shortfalls and surpluses than comparing estimated with preferred intake, as estimated intake does not necessarily account for all production of a given variety.*

(1) Planting data derived from PGIB vineyard register. Bearing area includes plantings more than three years old.

(2) Bearing area multiplied by yield estimate of 15t/ha for reds and 17t/ha for whites.

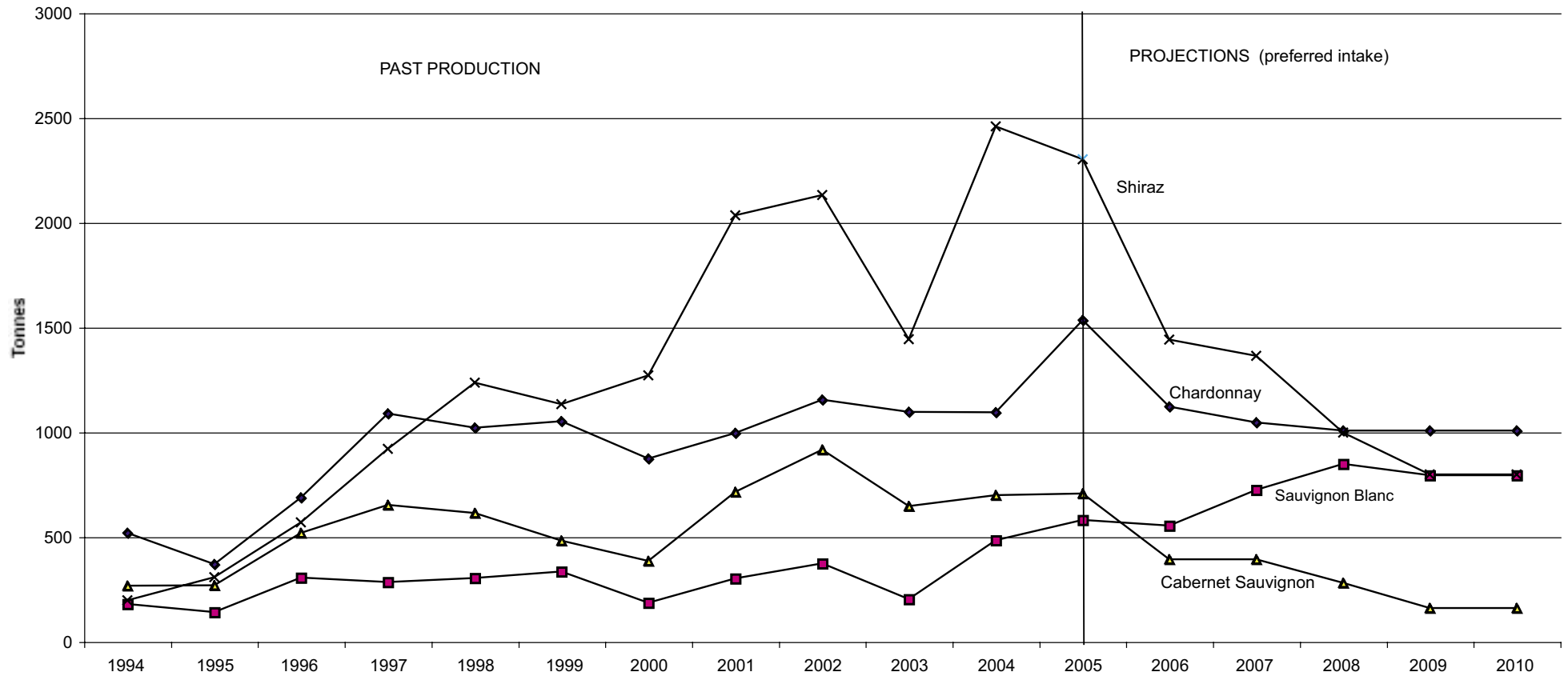
(3) Taken from the Utilisation and Pricing survey (see previous page).



# ADELAIDE PLAINS PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1994 - 2010

Figure 3.1

Past production and projections (major varieties)



## ADELAIDE PLAINS CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 3.5

Current area in hectares by year planted

Variety	Pre-2000	2000	2001	2002	2003	2004	Total area	% planted in 2004
<b>RED WINEGRAPES</b>								
CABERNET FRANC	3	0	0	0	0	0	3	0%
CABERNET SAUVIGNON	51	10	1	0	0	0	62	0%
GRENACHE	23	1	4	0	0	0	28	0%
MALBEC	7	0	0	0	0	0	7	0%
MATARO (MOUVEDRE)	4	0	0	0	0	0	4	0%
MERLOT	26	9	8	0	0	0	43	0%
PETIT VERDOT	2	0	0	0	0	0	2	0%
PINOT NOIR	18	0	0	0	0	0	18	0%
RUBY CABERNET	4	2	0	0	0	0	6	0%
SANGIOVESE	1	4	1	0	0	0	6	0%
SHIRAZ	130	18	32	0	0	0	180	0%
OTHER RED	1	2	1	0	0	0	3	0%
<b>TOTAL RED WINEGRAPES</b>	<b>270</b>	<b>46</b>	<b>47</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>362</b>	<b>0%</b>
<b>WHITE WINEGRAPES</b>								
CHARDONNAY	56	6	4	2	20	1	90	1%
CHENIN BLANC	5	0	0	0	0	0	5	0%
COLOMBARD	7	0	0	1	3	0	10	0%
MUSCAT BLANC	1	0	0	0	0	0	1	0%
MUSCAT GORDO BLANCO	3	0	0	0	0	0	3	0%
RIESLING	17	0	0	0	0	0	17	0%
SAUVIGNON BLANC	24	0	7	0	20	3	54	5%
SEMILLON	9	0	0	0	0	0	9	0%
VERDELHO	1	0	0	0	0	0	1	0%
VIOGNIER	0	0	16	0	0	0	16	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>123</b>	<b>6</b>	<b>27</b>	<b>3</b>	<b>43</b>	<b>4</b>	<b>206</b>	<b>2%</b>
<b>TOTAL ALL VARIETIES</b>	<b>393</b>	<b>52</b>	<b>74</b>	<b>3</b>	<b>43</b>	<b>4</b>	<b>568</b>	<b>1%</b>

