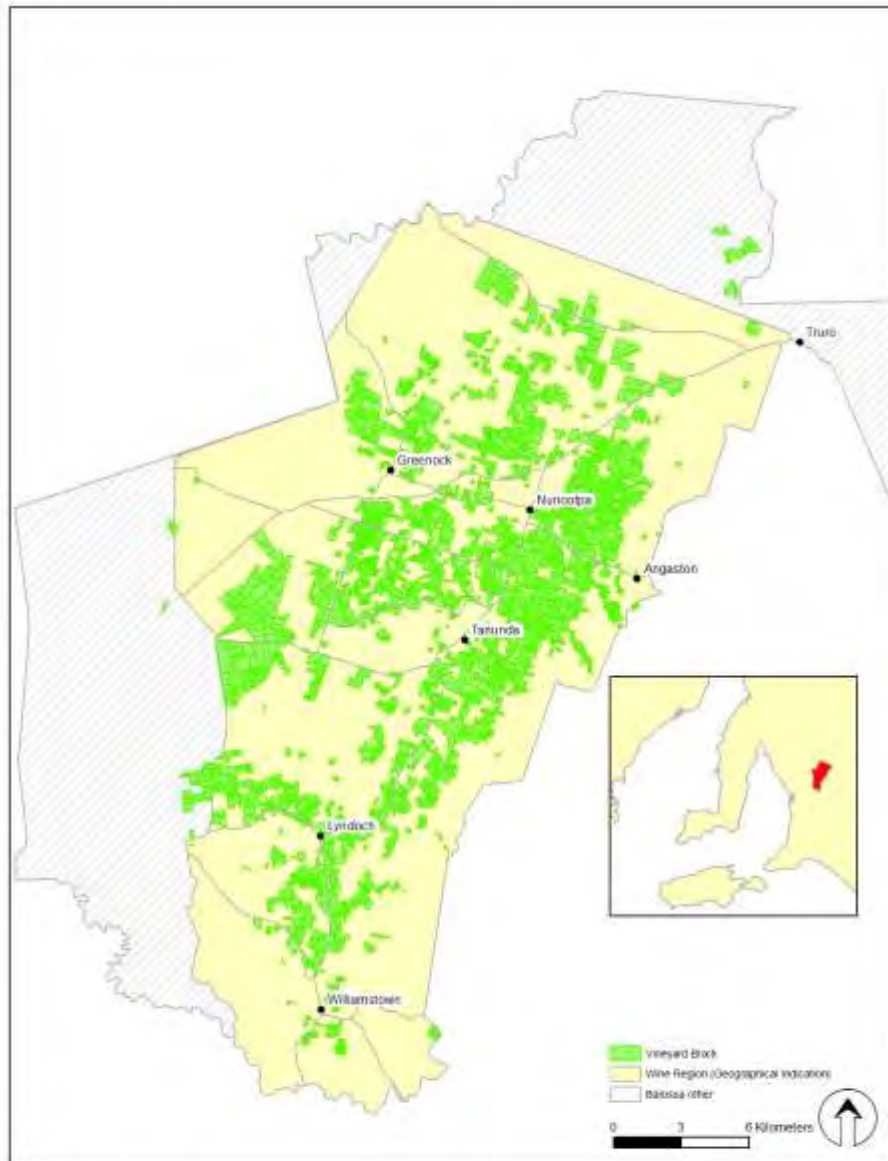


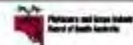
SA Winegrape Crush Survey Regional Summary Report - 2013

Barossa Valley Wine Region *Incorporating Barossa Zone - other*



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

Barossa Valley
Wine Region



DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, neither the Board nor its representatives, either express or implied, shall be held liable for any errors or omissions, or for any loss or damage arising from reliance upon the information displayed.

Barossa Valley

Vintage overview

Vintage report

The 2013 vintage in the Barossa Valley will be remembered as the driest, earliest and quickest vintage in memory.

The 2012/13 growing season was extremely variable in all aspects, with 2012 rainfall in the Barossa Valley the 5th driest on record.

Spring rainfall was also well below average, leading to variable vine growth across the region. The variable weather also saw a number of hot days above 35°C in both October and November.

The flowering period was particularly volatile, with a number of violent lightning storms damaging the emerging inflorescences. This combined with the dry conditions which continued into December and January, led to poor fruit set in most varieties.

A heat spell of temperatures over 33°C from 12-18 February caused many vineyards to lose more of their potential yield, and baumés jumped dramatically.

Many vineyards were harvested by the end of February/early March – a month or so earlier than 2012. Almost all vineyards were picked by the end of March; the earliest ever finish to vintage in memory. Yields were generally below average, but quality of both reds and whites looks strong.

Reds are showing excellent and balanced colours, flavours and tannins; Grenache may prove to be the real standout from the 2013 vintage, but Shiraz won't be far behind.

*Nigel Blieschke, Chairman, Barossa Viticulture Technical Group
Louisa Rose, Chief Winemaker, Yalumba Wine Company
Nicki Robins, Viticultural Development Officer, Barossa Grape & Wine Association*

Overview of vintage statistics

The harvest from the Barossa Valley (including Barossa zone – other) was 43,824 tonnes in 2013, down by 8,073 tonnes (15.6%) than the 2012 harvest, for a second year in a row. The total value of grapes from the region was \$58.4 million compared to \$64.4 million (12.6%) in 2012. The average purchase values for all the major varieties increased. Of the red varieties, Shiraz was up by \$186 per tonne to \$1,719 per tonne and Cabernet Sauvignon up by \$101 per tonne to \$1,277 per tonne. Of the white varieties, Semillon remained stable at \$507 per tonne and Chardonnay increased by \$19 per tonne to \$513 per tonne.

There were 143 hectares of new plantings in the Barossa Valley in spring 2012 (including top-working and replacements) compared with 74 hectares planted in 2011. Of the new plantings, Shiraz accounted for 62.9% and Cabernet Sauvignon 11.9%. The total planted area of vines in the region increased by 36 hectares compared with an increase in vines by 595 hectares in 2011.

The estimated production from the Barossa Valley region for 2014 is 72,500 tonnes, with the wineries' committed intake being 63,200 tonnes. This leaves an estimated 6,200 tonnes (8.5%) of uncommitted fruit.

In 2018, the estimated production increases slightly to 73,400 tonnes, of which 63,100 tonnes is already under contract or winery grown fruit. This leaves an estimated 10,200 tonnes (14%) yet to be contracted or is available on the open market.

Barossa Valley

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	65	\$800	\$1,800	\$66,200	\$1,012	22	88	\$88,646
Cabernet Sauvignon	3,405	\$750	\$5,730	\$4,348,818	\$1,277	1,913	5,318	\$6,792,520
Carignan	18	\$300	\$2,000	\$23,366	\$1,304	0	18	\$23,757
Grenache	1,807	\$500	\$10,000	\$2,318,052	\$1,283	825	2,631	\$3,376,345
Malbec	28	\$750	\$1,500	\$33,739	\$1,196	17	45	\$54,018
Mataro	497	\$300	\$8,000	\$725,987	\$1,461	303	800	\$1,168,433
Merlot	1,874	\$500	\$1,800	\$1,632,447	\$871	461	2,335	\$2,034,097
Meunier	7			\$9,482	\$1,400	0	7	\$9,482
Muscat A Petit Grains Rose	11			\$9,506	\$850	0	11	\$9,506
Nebbiolo	1			\$554	\$1,100	5	6	\$6,054
Other red	217	\$600	\$2,100	\$234,452	\$1,082	32	248	\$268,655
Petit Verdot	77	\$750	\$2,000	\$75,722	\$980	25	102	\$99,826
Pinot Noir	184	\$600	\$1,200	\$150,230	\$817	0	184	\$150,230
Sangiovese	110	\$500	\$2,700	\$162,142	\$1,477	38	148	\$218,194
Shiraz	13,155	\$310	\$96,011	\$22,616,837	\$1,719	8,674	21,829	\$37,529,201
Tempranillo	285	\$1,000	\$2,000	\$467,262	\$1,639	37	322	\$528,075
Touriga	34			\$47,080	\$1,373	25	59	\$81,546
Zinfandel	40	\$1,000	\$2,000	\$49,170	\$1,242	13	52	\$65,001
Total Red winegrapes	21,813			\$32,971,045		12,389	34,202	\$52,503,586

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 Barossa Valley is 7.1%.

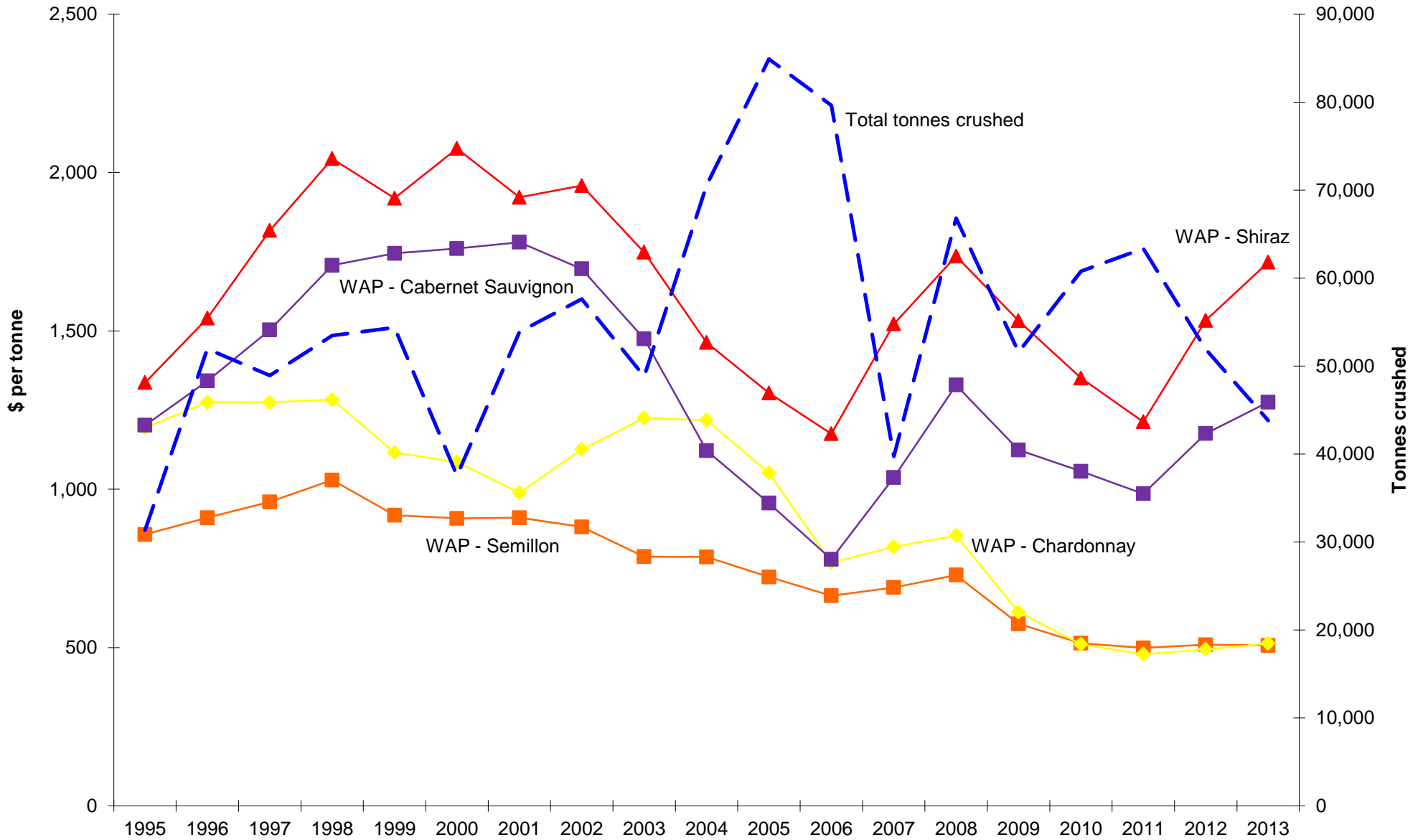
Barossa Valley

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
WHITE								
Chardonnay	2,208	\$250	\$1,000	\$1,133,214	\$513	858	3,066	\$1,573,576
Chenin Blanc	54	\$250	\$1,200	\$21,196	\$390	0	54	\$21,196
Marsanne	6			\$11,298	\$1,765	35	41	\$73,208
Muscadelle	10	\$450	\$800	\$7,085	\$721	2	12	\$8,447
Muscat A Petit Grains Blanc	181	\$700	\$11,000	\$145,484	\$804	158	339	\$272,895
Muscat Gordo Blanco	12			\$9,324	\$776	4	16	\$12,427
Other white	87	\$900	\$1,450	\$86,857	\$1,004	7	94	\$93,884
Palomino	5			\$3,680	\$800	88	93	\$74,080
Pedro Ximenes	1			\$1,400	\$1,000	18	20	\$19,700
Pinot Gris	23			\$27,190	\$1,164	33	56	\$65,601
Riesling	1,164	\$250	\$1,850	\$705,690	\$606	611	1,775	\$1,076,032
Roussanne	8			\$9,303	\$1,193	9	17	\$19,918
Sauvignon Blanc	783	\$250	\$1,400	\$627,755	\$802	63	846	\$678,353
Semillon	2,284	\$250	\$1,500	\$1,157,965	\$507	362	2,646	\$1,341,589
Traminer	67			\$49,614	\$745	0	67	\$49,614
Trebbiano	0			\$0	\$0	5	5	\$3,014
Verdelho	3			\$2,112	\$800	0	3	\$2,112
Viognier	383	\$400	\$2,250	\$388,856	\$1,014	90	474	\$480,257
Total White winegrapes	7,278			\$4,388,023		2,344	9,622	\$5,865,903
Grand Total All winegrapes	29,092			\$37,359,068		14,733	43,824	\$58,369,489

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 Barossa Valley is 7.1%.



Barossa Valley

Current plantings by variety and year planted

Variety	Current area in hectares*					% planted in 2012
	Pre-2010	2010	2011	2012	Total area	
Red winegrapes						
Cabernet Franc	30	0	2	2	34	5%
Cabernet Sauvignon	1,434	16	8	17	1,475	1%
Durif (Petite Sirah)	19	0	0	0	19	0%
Grenache	689	6	3	2	699	0%
Malbec	20	0	0	4	24	15%
Mataro (Mourvedre)	212	16	4	8	241	3%
Merlot	393	0	0	0	393	0%
Other Red	73	5	14	8	100	8%
Petit Verdot	23	0	0	0	23	0%
Pinot Noir	45	0	0	0	45	0%
Sangiovese	22	3	1	0	25	0%
Shiraz	6,170	107	69	90	6,436	1%
Tempranillo	73	8	6	6	94	7%
Zinfandel	14	0	0	0	14	0%
Total red varieties	9,217	162	108	136	9,623	1%
White winegrapes						
Chardonnay	513	1	0	1	514	0%
Chenin Blanc	26	0	0	0	26	0%
Marsanne	10	0	0	0	10	0%
Muscadelle (Tokay)	17	0	0	0	17	0%
Muscat A Petit Grains Blanc	53	0	1	0	54	0%
Other White	52	5	3	2	61	3%
Pedro Ximenes	10	0	0	0	10	0%
Pinot Gris	9	0	1	5	14	32%
Riesling	264	0	0	0	264	0%
Sauvignon Blanc	110	0	0	0	110	0%
Savagnin	7	0	0	0	7	0%
Semillon	489	0	0	0	489	0%
Vermentino	4	0	5	0	9	0%
Viognier	77	0	1	0	77	0%
Total white varieties	1,638	5	11	7	1,660	0%
Unknown variety	111	0	0	0	111	0%
Total all varieties	10,966	167	118	143	11,394	1%

*Includes plantings in Barossa Zone - other (234 hectares)

Barossa Valley

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	251	51	113	164	261	50	115	165	261	50	115	165
Cabernet Sauvignon	7,245	3,007	4,738	7,745	7,320	2,963	4,448	7,412	7,320	2,970	4,444	7,414
Carignan	0	1	26	27	0	1	39	40	0	1	39	40
Grenache	4,167	1,306	2,743	4,049	4,186	1,340	2,584	3,923	4,186	1,371	2,370	3,741
Malbec	120	71	88	159	131	72	64	136	131	72	58	130
Mataro	1,355	559	615	1,174	1,414	589	596	1,185	1,414	600	585	1,185
Merlot	2,360	858	1,637	2,495	2,361	854	1,511	2,366	2,361	854	1,242	2,097
Muscat A Petit Grains Rose	0	0	15	15	0	0	15	15	0	0	15	15
Nebbiolo	56	27	0	27	56	27	0	27	56	27	0	27
Other red	974	60	258	319	1,024	103	275	378	1,024	103	280	384
Petit Verdot	141	25	85	110	141	25	85	110	141	25	20	45
Pinot Noir	405	0	243	243	405	0	200	200	405	0	200	200
Sangiovese	193	50	229	279	202	60	253	313	202	60	253	313
Shiraz	37,678	13,380	22,227	35,607	38,223	13,917	21,347	35,264	38,223	14,180	20,609	34,788
Tempranillo	657	140	329	469	710	241	357	598	710	241	365	607
Touriga	0	37	22	58	0	44	22	66	0	44	22	66
Zinfandel	0	22	54	75	0	22	54	75	0	22	54	75
Total red winegrapes	55,601	19,594	33,422	53,015	56,432	20,309	31,964	52,272	56,432	20,620	30,671	51,291
White winegrapes												
Chardonnay	4,618	1,430	2,469	3,899	4,624	1,367	2,314	3,682	4,624	1,367	2,314	3,682
Chenin Blanc	332	2	93	95	332	2	114	116	332	2	114	116
Marsanne	78	31	10	41	78	31	15	46	78	31	15	46
Muscadelle	0	5	6	12	0	5	6	12	0	5	6	12
Muscat A Petit Grains Blanc	425	214	238	452	426	238	238	476	426	238	238	476
Muscat Gordo Blanco	0	4	4	9	0	4	4	9	0	4	0	4
Other white	1,078	26	155	181	1,091	55	155	210	1,091	55	155	210
Palomino	0	199	11	210	0	199	16	215	0	199	16	215
Pedro Ximenes	0	23	2	25	0	23	2	25	0	23	2	25
Pinot Gris	73	54	46	100	93	97	54	151	93	129	54	183
Riesling	2,109	864	1,390	2,254	2,109	265	1,139	1,404	2,109	266	1,130	1,396
Roussanne	55	22	13	34	56	22	13	34	56	22	13	34
Sauvignon Blanc	1,542	160	939	1,099	1,542	160	896	1,056	1,542	160	715	875
Semillon	5,865	512	3,633	4,145	5,865	509	3,469	3,978	5,865	509	3,332	3,840
Traminer	82	0	100	100	97	0	108	108	97	0	108	108
Verdelho	0	0	11	11	0	0	11	11	0	0	11	11
Viognier	616	164	467	631	617	176	468	643	617	176	421	597
Total white winegrapes	16,873	3,710	9,587	13,297	16,931	3,153	9,022	12,175	16,931	3,186	8,644	11,830
All winegrapes	72,474	23,304	43,009	66,312	73,363	23,462	40,986	64,448	73,363	23,806	39,315	63,121

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

² A raising factor of 1.076 has been applied to committed intake to allow for non-respondents