

DATUM: GDA94
 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 - DTE

Coonawarra Wine Region

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Coonawarra Wine Region

Regional summary report

2011

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 2011 South Australian Utilisation and Pricing 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.

Vintage report

History will note the 2011 vintage was one of mixed fortunes. Elegant, varietal whites and a mixed offering of reds are the results.

Above average rainfall during winter, and colder spring soil temperatures contributed to a slow bud burst, delivering shorter shoot growth up to flowering in November. Several rainfall events over the November/December period proved challenging to viticulturist, with healthy vine canopies and some mildew control, the primary focus.

Fruit set was relatively even in all varieties and with diligent disease management and strategic crop manipulation, many parcels of fruit, exhibiting good varietal characters, at lower maturity and alcohol levels have been picked.

Promising wines are expected from our key white varieties, with Chardonnay expected to be the leading light. Good leaf fruit ratios and slow ripening conditions have contributed to ideal flavour development of these wines.

Cabernet Sauvignon, once again, has withstood the difficult season, with early harvested fruit exhibiting key Cabernet characteristics at much lower Baume (sugar levels) than in recent vintages.

All in all, the 2011 vintage produced smaller volumes of medium bodied, traditional wines.

Key Facts:

- Total season rainfall – 777mm
- 20 year average seasonal rainfall – 582mm
- Total growing season heat degree days – 1301
- 20 year average total heat degree days – 1359
- Start of vintage – 21 February 2011
- End of vintage – 9 May 2011

Sue Hodder, President, Coonawarra Vignerons Association
Stuart Sharman, President, Coonawarra Grapegrowers

Overview of vintage statistics

The harvest from Coonawarra was 26,109 tonnes in 2011, down 9,985 tonnes (28%) compared with 2010. The total value of grapes from the region fell to \$20 million, compared with \$30 million in 2010. The average purchase value for the three major varieties continue to decrease for the second year in a row, with Shiraz falling a further 28% to \$644 per tonne – the third lowest value in this series since 1993. Cabernet Sauvignon declined by 17%, but is comparative to 2006. The average price for Merlot decreased to the value of \$530.

There was 24 hectares of new plantings in Coonawarra in spring 2010 (including top-working and replacements), with 50% Shiraz and 34% Cabernet Sauvignon. The total vineyard planted area increased by 77 hectares, from 5,636 hectares to 5,713 hectares.

The estimated production from the Coonawarra region for 2012 is 41,600 tonnes. The wineries' committed intake is around 35,200 tonnes, leaving 6,400 tonnes (15.4%) of uncommitted fruit.

In 2016 the estimated production is 25,900 tonnes under contract or winery grown fruit leaving 15,800 tonnes (37.9%) available on the open market.

Coonawarra

Winegrape intake summary - vintage 2011

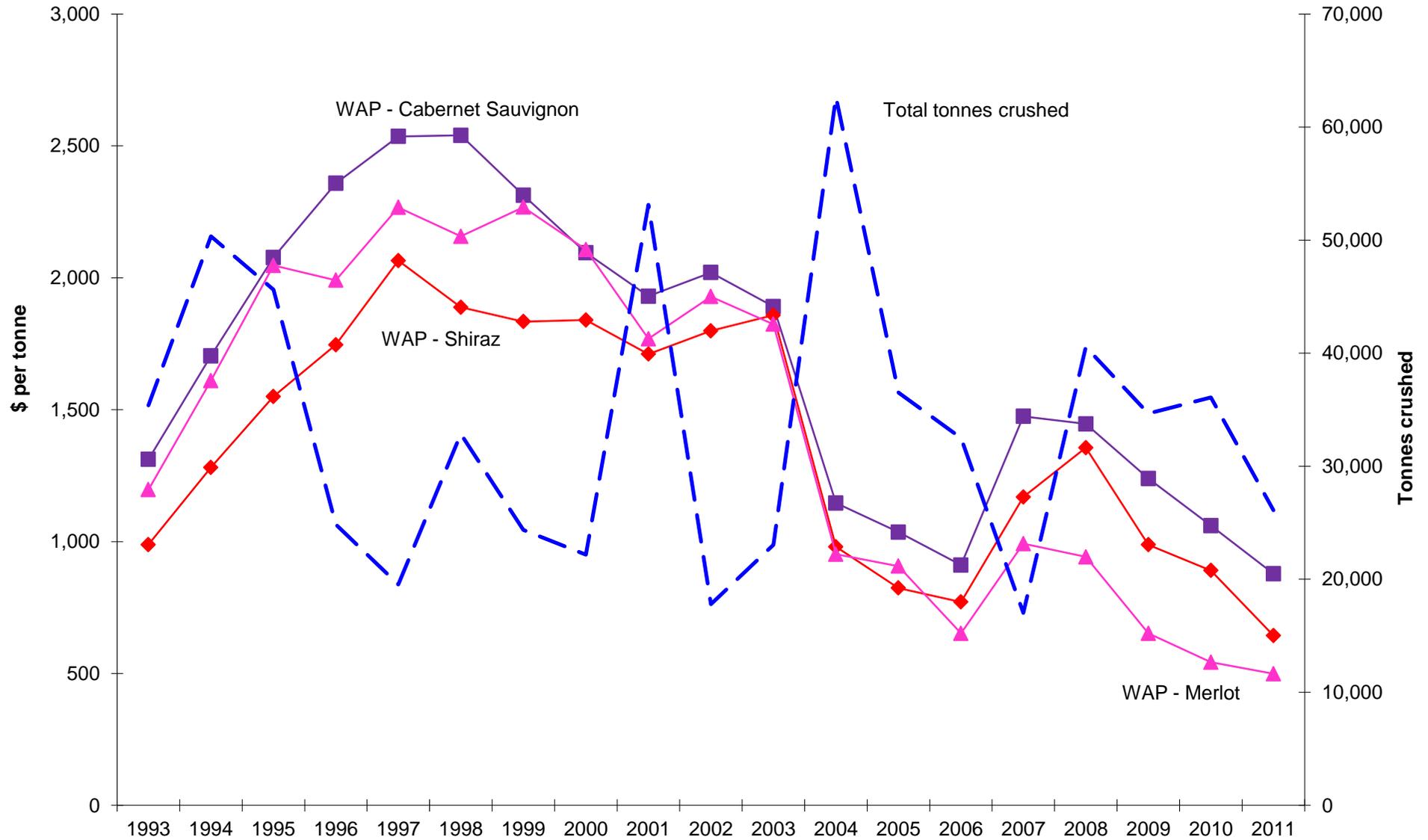
Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
RED								
Cabernet Franc	0			\$0	\$0	224	224	\$193,142
Cabernet Sauvignon	6,677	\$250	\$1,980	\$5,860,464	\$878	8,077	14,754	\$12,949,988
Malbec	0			\$0	\$0	7	7	\$6,030
Merlot	812	\$350	\$1,000	\$404,981	\$499	1,778	2,589	\$1,291,549
Meunier	4			\$3,800	\$1,000	34	38	\$37,920
Other Red	5			\$4,005	\$750	0	5	\$4,005
Petit Verdot	112			\$111,180	\$992	29	141	\$139,818
Pinot Noir	113	\$400	\$1,170	\$99,817	\$883	204	317	\$279,666
Ruby Cabernet	0			\$0	\$0	5	5	\$4,445
Shiraz	612	\$400	\$1,500	\$394,053	\$644	3,098	3,710	\$2,390,056
Tempranillo	0			\$0	\$0	2	2	\$1,370
Total Red winegrapes	8,335			\$6,878,300		13,457	21,792	\$17,289,375
WHITE								
Chardonnay	686	\$150	\$1,450	\$363,580	\$530	1,868	2,554	\$1,353,666
Other White	0			\$0	\$0	17	17	\$10,963
Pedro Ximenes	0			\$0	\$0	7	7	\$4,643
Pinot Gris	33			\$26,176	\$800	0	33	\$26,176
Riesling	95	\$350	\$800	\$69,890	\$733	703	798	\$585,204
Sauvignon Blanc	487	\$600	\$1,200	\$380,535	\$781	353	841	\$656,509
Semillon	7			\$3,260	\$502	40	46	\$23,181
Traminer	0			\$0	\$0	20	20	\$12,704
Viognier	0			\$0	\$0	1	1	\$387
Total White winegrapes	1,308			\$843,441		3,009	4,317	\$2,673,432
Total All winegrapes	9,643			\$7,721,741		16,466	26,109	\$19,962,808

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 Coonawarra is 1.7%.

Coonawarra

Historical Weighted Average Price vs tonnes crushed



Coonawarra

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2010
	Pre-2008	2008	2009	2010		
Red winegrapes						
Cabernet Franc	39	0	0	0	39	0%
Cabernet Sauvignon	3,387	4	9	8	3,408	0%
Malbec	15	0	0	0	15	0%
Merlot	404	0	0	0	404	0%
Other red	5	0	1	0	6	0%
Petit Verdot	23	0	0	0	23	0%
Pinot Noir	45	0	0	0	45	0%
Shiraz	1,144	2	0	12	1,158	1%
Total red varieties	5,063	6	10	20	5,098	0%
White winegrapes						
Chardonnay	368	0	0	0	368	0%
Other white	3	0	0	5	8	0%
Riesling	92	0	0	0	92	0%
Sauvignon Blanc	104	1	0	0	105	0%
Semillon	10	0	0	0	10	0%
Traminer (Gewurztraminer)	2	0	0	0	2	0%
Viognier	3	0	0	0	3	0%
Total white varieties	583	1	0	5	589	0%
Unknown variety	26	0	0	0	26	0%
Total all varieties	5,671	7	10	24	5,713	0%

Coonawarra

Estimated supply and committed intake 2012 - 2016

Variety	2012				2014				2016			
	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												
Barbera	0	10	0	10	0	10	0	10	0	10	0	10
Cabernet Franc	310	250	40	290	310	250	0	250	310	250	0	250
Cabernet Sauvignon	23,763	11,586	8,234	19,820	23,812	11,289	5,538	16,827	23,812	11,062	2,107	13,169
Malbec	121	65	0	65	121	65	0	65	121	65	0	65
Merlot	2,827	1,882	346	2,228	2,827	1,882	91	1,972	2,827	1,882	91	1,972
Meunier	0	35	4	39	0	35	4	39	0	35	4	39
Nebbiolo	0	4	0	4	0	7	0	7	0	7	0	7
Other Red	252	0	16	16	253	0	16	16	253	0	16	16
Petit Verdot	182	91	133	224	182	91	16	107	182	91	16	107
Pinot Noir	363	298	106	404	363	298	106	404	363	298	106	404
Ruby Cabernet	0	5	0	5	0	5	0	5	0	5	0	5
Shiraz	8,017	5,515	2,161	7,675	8,063	5,550	1,106	6,657	8,063	5,573	353	5,926
Tempranillo	0	3	0	3	0	3	0	3	0	3	0	3
Total red winegrapes	35,836	19,744	11,040	30,784	35,931	19,485	6,877	26,363	35,931	19,281	2,693	21,974
White winegrapes												
Chardonnay	3,682	1,960	883	2,843	3,682	1,960	607	2,567	3,682	1,960	464	2,424
Other White	25	15	0	15	43	15	0	15	43	15	0	15
Pedro Ximenes	0	7	0	7	0	7	0	7	0	7	0	7
Riesling	1,013	542	106	648	1,013	542	121	664	1,013	542	121	664
Sauvignon Blanc	944	489	357	847	948	582	163	745	948	582	163	745
Semillon	90	49	3	52	90	72	3	75	90	72	3	75
Traminer	20	21	0	21	20	21	0	21	20	21	0	21
Viognier	27	2	2	4	27	2	2	4	27	2	2	4
White winegrapes	5,802	3,087	1,351	4,438	5,823	3,203	896	4,098	5,823	3,203	753	3,956
All winegrapes	41,637	22,830	12,391	35,222	41,755	22,688	7,773	30,461	41,755	22,483	3,446	25,929

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

² A raising factor of 1.02 has been applied to committed intake to allow for non-respondents