

DATUM: GDA94
 PROJECTION: MGA Zone 54
 DATE: 27 April 2011
 SOFTWARE: ESRI ArcGIS v10
 DATA SOURCE:
 Vineyard Blocks - PGIBSA
 Wine Regions - Wine Australia
 Localities - SA Gazetteer
 Roads - DTEI

Coonawarra Wine Region

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Coonawarra Wine Region

Regional summary report

2012

Coonawarra

Vintage overview

Vintage report

The 2012 Coonawarra vintage is described as “excellent” by all winemakers. Good winter rains resulted in a full soil moisture profile leading to ample vine carbohydrate reserves. These optimal growing conditions, combined with an early burst of warm weather, meant the vines started their growing cycle a couple of weeks early. The lack of frost and small but frequent rains maintained the early season.

Flowering commenced in late October with mild but windy conditions leading to a slightly poorer set than in the previous couple of years. Coupled with above average temperatures from November to January, berries were smaller than average further contributing to lower yields in most varieties.

Veraison commenced in late January - two weeks earlier than average. Cabernet, Shiraz and Merlot did lag a little, but quickly caught up once a warmer spell arrived in January. January was also very dry (3mm total rainfall) for the month. The dryer than normal conditions progressed into February, leading to a very rapid accumulation of sugars in the berries.

Harvest began in early February on the whites (again about two weeks ahead of average), with favourable sugar and acid ratios. As the reds started to reach between 10 to 12 Baume, a period of very cool nights and mild but warm days set in which served to effectively slow the ripening process. The grapes had time to reach optimum phenological maturity. Seed hardness coincided with sugar and flavour levels. Good natural acidity levels are a clear attribute of vintage 2012. Supple tannins are evident already in reds.

Overall, 2012 grape tonnages were below average but quality is very pleasing. Sauvignon Blanc, Riesling and Chardonnay have all been positively received by Coonawarra winemakers. Crisp acidity and good varietal definition is well noted. 2012 Coonawarra reds are very strong. Shiraz shows classic red fruits with hints of spice – medium bodied and fresh. Cabernet Sauvignon is highly coloured, concentrated and varietal. This promises to be a vintage to collect.

There was very little uncontracted fruit in Coonawarra in 2012. Furthermore, there was strong demand for what was available. Strengthening markets in Asia (particularly China) ensured good demand for quality fruit.

Sue Hodder, President, Coonawarra Vignerons Association

Daniel Newson, President, Coonawarra Grapegrowers Association

Sarah-Jane Arnold, Administration & Events Manager

Overview of vintage statistics

The harvest from Coonawarra was 23,920 tonnes in 2012, down 2,189 tonnes (8.4%) compared with 2011. The total value of grapes from the region rose to \$27.6 million, compared with \$20 million in 2011. The average purchase value for the three major varieties increased – Cabernet Sauvignon up by \$483 per tonne to \$1,361 per tonne; Shiraz up by \$490 per tonne to \$1,134 per tonne and Chardonnay up by \$81 per tonne to \$611 per tonne.

There was 9 hectares of new plantings in Coonawarra in spring 2011 (including top-working and replacements), with 66.7% Malbec and 11% Cabernet Sauvignon. The total vineyard planted area increased slightly by 34 hectares, from 5,713 hectares to 5,747 hectares.

The estimated production from the Coonawarra region for 2013 is 41,900 tonnes. The wineries' committed intake is around 30,500 tonnes, leaving 11,400 tonnes (27.2%) of uncommitted fruit.

In 2017, the estimated production is 23,300 tonnes under contract or winery grown fruit leaving 18,700 tonnes (44.6%) available on the open market.

Coonawarra

Winegrape intake summary - vintage 2012

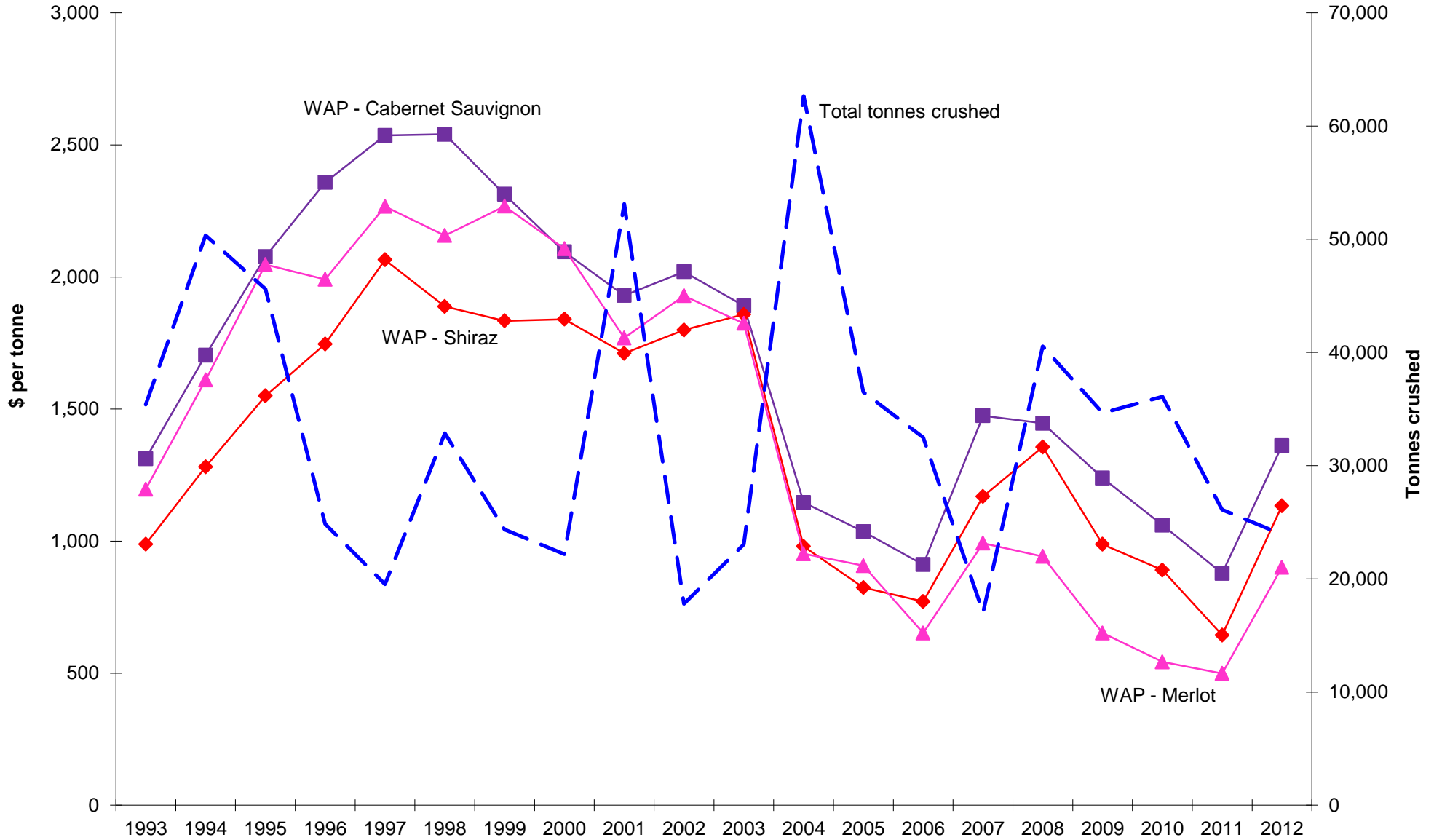
Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
RED								
Barbera	0			\$0	\$0	2	2	\$1,879
Cabernet Franc	22	\$450	\$1,000	\$17,890	\$807	143	165	\$133,425
Cabernet Sauvignon	5,322	\$700	\$3,600	\$7,244,623	\$1,361	6,290	11,612	\$15,806,934
Malbec	0			\$0	\$0	52	52	\$65,031
Merlot	795	\$547	\$1,600	\$716,177	\$901	1,520	2,315	\$2,085,537
Meunier	0			\$0	\$0	21	21	\$26,308
Nebbiolo	0			\$0	\$0	0	0	\$589
Other Red	4			\$3,759	\$1,044	2	6	\$6,161
Petit Verdot	155			\$152,130	\$980	33	188	\$184,262
Pinot Noir	129			\$140,709	\$1,094	237	366	\$400,200
Ruby Cabernet	0			\$0	\$0	2	2	\$2,506
Shiraz	1,705	\$600	\$1,980	\$1,933,007	\$1,134	4,117	5,822	\$6,600,503
Tempranillo	0			\$0	\$0	2	2	\$2,130
Total Red winegrapes	8,132			\$10,208,295		12,421	20,553	\$25,315,464
WHITE								
Chardonnay	494	\$350	\$1,450	\$301,965	\$611	1,880	2,374	\$1,450,886
Other White	0			\$0	\$0	8	8	\$5,098
Pedro Ximenes	0			\$0	\$0	10	10	\$6,373
Riesling	18			\$17,444	\$990	545	563	\$557,357
Sauvignon Blanc	99	\$585	\$1,035	\$69,578	\$704	237	336	\$236,594
Semillon	0			\$0	\$0	43	43	\$27,086
Traminer	0			\$0	\$0	28	28	\$17,845
Viognier	1			\$600	\$1,000	4	5	\$4,890
Total White winegrapes	611			\$389,587		2,756	3,367	\$2,306,128
Total All winegrapes	8,743			\$10,597,882		15,177	23,920	\$27,621,593

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 1.9%.

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 2011
	Pre-2009	2009	2010	2011		
Red winegrapes						
Cabernet Franc	39	0	0	0	39	0%
Cabernet Sauvignon	3,421	9	8	1	3,439	0%
Malbec	12	0	0	6	17	33%
Merlot	405	0	1	0	406	0%
Other red	5	1	0	0	6	3%
Petit Verdot	19	0	0	0	19	0%
Pinot Noir	45	0	0	0	45	0%
Shiraz	1,148	0	12	0	1,160	0%
Total red varieties	5,092	10	21	7	5,129	0%
White winegrapes						
Chardonnay	358	0	0	0	358	0%
Other white	3	0	5	0	8	0%
Riesling	92	0	0	0	92	0%
Sauvignon Blanc	105	0	0	2	107	2%
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	574	0	5	2	581	0%
Unknown variety	37	0	0	0	37	0%
Total all varieties	5,703	10	25	9	5,747	0%

Coonawarra

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												
Barbera	4	5	0	5	5	5	0	5	5	5	0	5
Cabernet Franc	0	205	10	215	0	101	10	111	0	101	10	111
Cabernet Sauvignon	24,016	11,047	6,228	17,275	24,050	9,986	3,460	13,446	24,050	9,740	2,748	12,488
Malbec	92	60	0	60	115	84	0	84	115	92	0	92
Merlot	2,836	1,631	196	1,827	2,837	1,581	152	1,732	2,837	1,581	149	1,729
Meunier	0	33	0	33	0	33	0	33	0	33	0	33
Nebbiolo	0	2	0	2	0	9	0	9	0	9	0	9
Other Red	499	3	10	13	500	3	10	13	500	3	10	13
Petit Verdot	150	39	10	50	150	39	12	52	150	39	12	52
Pinot Noir	357	423	101	524	357	403	41	443	357	403	101	504
Ruby Cabernet	0	5	0	5	0	5	0	5	0	5	0	5
Shiraz	8,076	5,427	1,289	6,716	8,093	4,289	761	5,050	8,093	4,289	463	4,752
Tempranillo	0	3	0	3	0	3	0	3	0	3	0	3
Total red winegrapes	36,030	18,882	7,845	26,727	36,107	16,542	4,446	20,988	36,107	16,304	3,494	19,798
White winegrapes												
Chardonnay	3,583	2,222	347	2,570	3,583	2,174	159	2,333	3,583	2,174	152	2,326
Other White	192	8	0	8	199	8	0	8	199	8	0	8
Pedro Ximenes	0	7	0	7	0	7	0	7	0	7	0	7
Riesling	1,013	594	15	610	1,013	554	15	569	1,013	554	15	569
Sauvignon Blanc	946	418	30	449	955	443	30	474	955	446	30	476
Semillon	90	38	0	38	90	46	0	46	90	46	0	46
Traminer	20	35	0	35	20	35	0	35	20	35	0	35
Viognier	27	4	0	4	27	4	0	4	27	4	0	4
Total white winegrapes	5,872	3,328	393	3,721	5,888	3,271	205	3,476	5,888	3,273	197	3,471
All winegrapes	41,901	22,211	8,237	30,448	41,995	19,813	4,650	24,464	41,995	19,578	3,691	23,269

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

² A raising factor of 1.013 has been applied to committed intake to allow for non-respondents