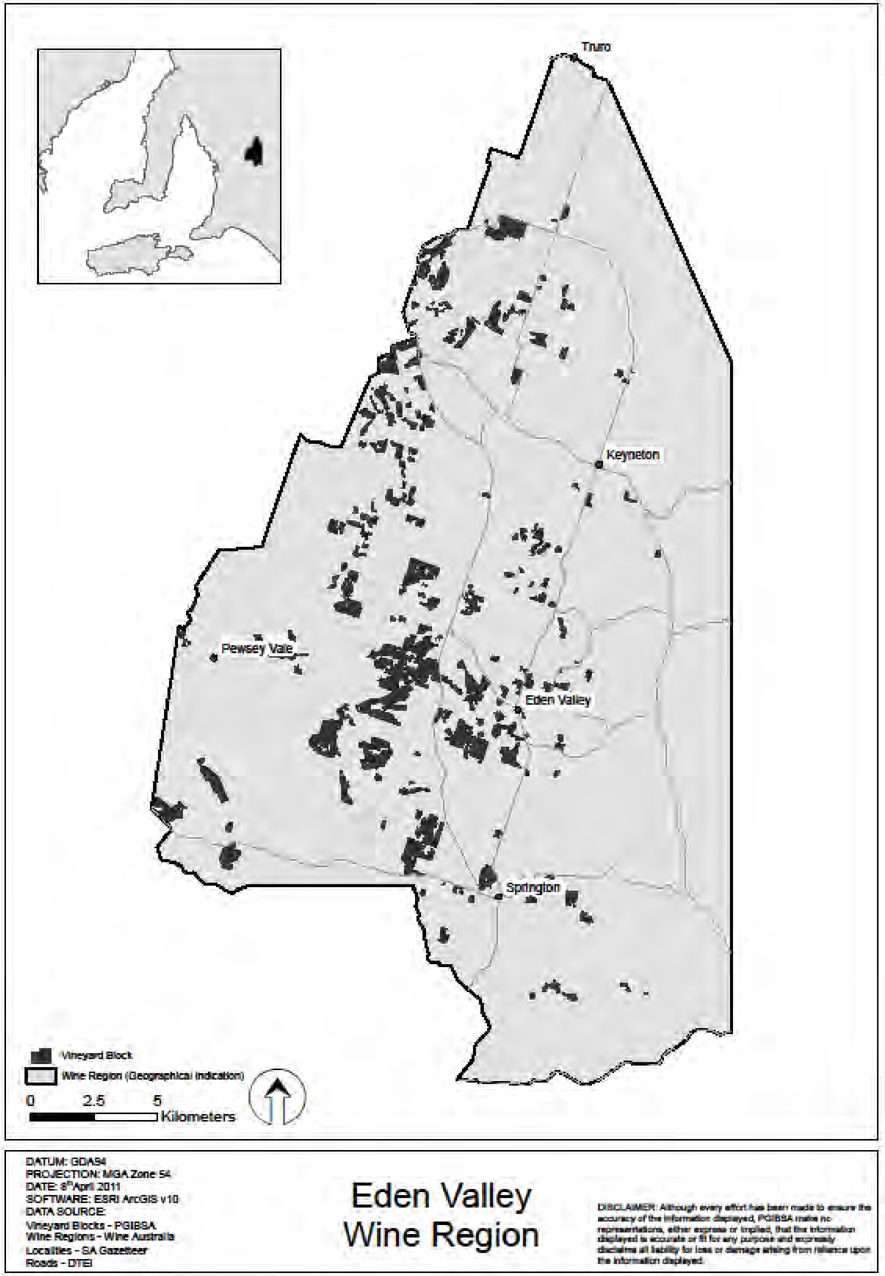

Eden Valley Wine Region

Regional summary report

2012

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 receival – 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 2012 South Australian Crush 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.

Eden Valley

Vintage overview

Vintage report

Winter rains were below average and water catchment into the local dams was consequently reduced after the two average winters of 2010 and 2011. Soil profiles were in most cases nearing the full point by end of August, with budburst starting one to two weeks earlier than the late 2011 season - closer to the long term average.

A similar but reduced rainfall pattern through spring led to Downy Mildew primary infections starting up in the young shoots, reminiscent of 2011. Canopies grew large with strong lateral growth due to the regular rainfall pattern through to the end of December, requiring more frequent spray coverage than the regular 14 day period. Overcast conditions through most of summer meant Powdery Mildew also had to be carefully managed. Cooler and wetter conditions in the last week of November led to poor set in the mid-flowering varieties such as Shiraz and Tempranillo.

As in the Barossa Valley, picking began approximately one month earlier than 2011, but a second rain event at the end of February pushed back Baumés and slowed down the harvest. The earlier varieties, Riesling and Semillon, and the later Cabernet Sauvignon set well and provided well balanced crops.

Milder summer conditions and cool nights helped develop great flavours and good sugar to acid ratios, particularly in Riesling which was picked late February to early March.

Following the rain in late February, later varieties such as Shiraz ripened in drier, cooler conditions through March to early April, providing some excellent flavours and tannin maturity.

Riesling yields were mixed, with some wineries reporting normal crops, some average – and others down by up to 20%. Quality is excellent, with lovely natural acidity and fine but intense flavours. Chardonnay yields were also mixed - ranging from average to 20% down. The wines are complex and layered, again showing great natural acidity.

Viognier yields were 30% down on average, hence the grapes ripened quickly; in many cases retaining more natural acidity than you would expect from the variety. Flavours are intense and varietal.

Shiraz yields ranged from average to 25% down, with strong wines of very intense colours, fragrant aromas and fine tannins due to the cool nights. The last of the cooler sites were harvested in mid-April. Yields were above average for Merlot; average for Semillon, Cabernet Sauvignon, Nebbiolo and Tempranillo, and below average for Gewürztraminer and Barbera.

Riesling, Shiraz and Cabernet Sauvignon were outstanding in 2012, with flavour development and acids progressing smoothly due to the cool, overcast conditions in spring and early summer.

Nigel Blieschke, Chairman, Barossa Viticulture Technical Group
Prue Henschke, Viticulturalist, CA Henschke & Co
Louisa Rose, Chief Winemaker, Yalumba Wine Company
Nicki Robins, Viticultural Development Officer, Barossa Grape & Wine Association

Overview of vintage statistics

The harvest from Eden Valley was 9,960 tonnes in 2012, 18.8% lower than the 2011 harvest of 12,262 tonnes. The total value of grapes from the region increased slightly from $11.9 million in 2011 to $12.3 million. The average purchase value for Riesling increased by $107 per tonne to $1,122 per tonne, however Chardonnay decreased by $11 in value to $805 per tonne. Red varieties increased in price significantly – with Shiraz up by $534 per tonne to $1,726 per tonne and Cabernet Sauvignon up by $416 per tonne to $1,280 per tonne.

There was 16 hectares of new plantings in Eden Valley in spring 2011 (including top-working and replacements), with the total area of planted vines in the region increasing slightly by 23 hectares to 2,254 hectares.

The estimated production from Eden Valley for 2013 is around 14,800 tonnes. The wineries' committed intake is 11,500 tonnes, leaving 3,300 tonnes (22.3%) of uncommitted fruit.

In 2017, the estimated production is 14,900 tonnes under contract or winery grown fruit leaving 4,000 tonnes (26.8%) available on the open market.

Eden Valley

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	1	1	$1,166
Cabernet Franc	9			$16,200	$1,800	3	12	$21,645
Cabernet Sauvignon	299	$750	$5,730	$383,075	$1,280	587	886	$1,134,313
Grenache	10			$9,070	$893	25	35	$31,209
Malbec	0			$0	$0	25	25	$39,210
Mataro	45	$1,400	$2,012	$77,448	$1,709	0	45	$77,448
Merlot	177	$800	$1,050	$162,806	$921	218	395	$363,791
Muscat a Petit Grains Rouge	2			$1,940	$1,000	0	2	$1,940
Nebbiolo	0			$0	$0	3	3	$4,509
Other Red	17			$24,522	$1,477	4	20	$29,988
Petit Verdot	0			$0	$0	41	41	$64,489
Pinot Noir	128	$600	$1,300	$121,695	$954	141	269	$256,320
Shiraz	1,589	$750	$8,500	$2,741,553	$1,726	945	2,534	$4,372,512
Tempranillo	8			$12,030	$1,504	6	14	$21,504
Total Red winegrapes	**2,284**			**$3,550,338**		**2,000**	**4,283**	**$6,420,045**
WHITE								
Chardonnay	705	$600	$1,200	$567,085	$805	790	1,495	$1,202,937
Marsanne	0			$0	$0	3	3	$2,751
Muscat a Petit Grains Blanc	13			$13,000	$1,000	0	13	$13,000
Muscat Gordo Blanco	5			$4,230	$900	0	5	$4,230
Other White	15			$19,440	$1,332	15	29	$39,146
Pinot Gris	89	$992	$1,200	$101,572	$1,136	221	311	$352,836
Riesling	1,416	$250	$2,150	$1,588,785	$1,122	1,460	2,876	$3,227,019
Roussanne	9			$9,350	$1,100	6	15	$15,950
Sauvignon Blanc	141	$750	$1,000	$122,382	$868	204	345	$299,054
Semillon	244	$600	$1,500	$188,765	$773	39	283	$218,690
Traminer	80			$77,930	$975	13	93	$91,019
Viognier	139			$213,953	$1,535	71	211	$323,078
Total White winegrapes	**2,855**			**$2,906,492**		**2,821**	**5,677**	**$5,789,711**
Total All winegrapes	**5,139**			**$6,456,830**		**4,821**	**9,960**	**$12,209,755**

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 Eden Valley is 4.2%.

Eden Valley

Current plantings by variety and year planted

Variety	Pre-2009	2009	2010	2011	Total area	% planted in 2011
	Current area in hectares					
Red winegrapes						
Cabernet Franc	5	0	0	0	5	*0%*
Cabernet Sauvignon	293	0	4	1	298	*0%*
Grenache	21	0	0	0	21	*0%*
Mataro (Mourvedre)	10	0	0	0	10	*0%*
Merlot	78	0	1	0	79	*0%*
Meunier (Pinot Meunier)	4	0	0	0	4	*8%*
Other red	8	1	0	2	10	*14%*
Petit Verdot	11	0	0	0	11	*0%*
Pinot Noir	60	0	0	0	60	*0%*
Sangiovese	1	1	0	0	2	*0%*
Shiraz	675	4	2	3	684	*0%*
Tempranillo	3	1	0	5	9	*57%*
Total red varieties	**1,168**	**7**	**7**	**12**	**1,194**	***1%***
White winegrapes						
Chardonnay	267	0	0	0	267	*0%*
Muscat A Petit Grains Blanc	6	0	0	0	6	*0%*
Other white	7	1	0	2	10	*21%*
Pinot Gris	34	2	1	0	37	*0%*
Riesling	543	5	7	0	556	*0%*
Roussanne	3	0	0	2	6	*40%*
Sauvignon Blanc	57	0	0	0	57	*0%*
Savagnin	4	0	0	0	4	*0%*
Semillon	43	0	0	0	43	*0%*
Traminer (Gewurztraminer)	20	0	0	0	20	*0%*
Viognier	40	0	0	0	40	*0%*
Total white varieties	**1,025**	**8**	**9**	**4**	**1,046**	***0%***
Unknown variety	14	0	0	0	14	*0%*
Total all varieties	**2,207**	**15**	**16**	**16**	**2,254**	***1%***

Eden Valley

Estimated supply and committed intake 2013 - 2017

Variety	2013 Est Supply [1]	2013 Committed intake[2] Winery grapes	2013 Committed intake[2] Contract purchases	2013 Committed intake[2] Total committed intake	2015 Est Supply [1]	2015 Committed intake[2] Winery grapes	2015 Committed intake[2] Contract purchases	2015 Committed intake[2] Total committed intake	2017 Est Supply [1]	2017 Committed intake[2] Winery grapes	2017 Committed intake[2] Contract purchases	2017 Committed intake[2] Total committed intake
Red winegrapes												
Barbera	0	1	0	1	0	1	0	1	0	1	0	1
Cabernet Franc	23	3	9	12	23	3	9	12	23	3	9	12
Cabernet Sauvignon	1,180	816	495	1,311	1,186	846	322	1,168	1,186	889	268	1,157
Grenache	104	23	8	31	104	34	8	42	104	34	8	42
Malbec	0	25	0	25	0	25	0	25	0	25	0	25
Mataro	48	0	60	60	48	0	60	60	48	0	60	60
Merlot	394	263	123	386	395	288	123	412	395	288	123	412
Muscat a Petit Grains Rouge / Rose	0	0	2	2	0	0	2	2	0	0	2	2
Nebbiolo	0	4	0	4	0	4	0	4	0	4	0	4
Other Red	86	5	15	20	93	5	15	20	93	5	15	20
Petit Verdot	55	61	0	61	55	66	0	66	55	66	0	66
Pinot Noir	539	248	129	377	539	248	129	377	539	248	129	377
Shiraz	4,074	1,185	1,687	2,873	4,093	1,205	1,546	2,752	4,093	1,260	1,360	2,619
Tempranillo	17	15	10	25	32	15	25	40	32	15	35	50
Total red winegrapes	**6,541**	**2,649**	**2,539**	**5,188**	**6,589**	**2,741**	**2,239**	**4,980**	**6,589**	**2,838**	**2,009**	**4,847**
White winegrapes												
Chardonnay	2,133	842	883	1,725	2,133	1,014	777	1,790	2,133	1,059	356	1,415
Marsanne	0	4	0	4	0	4	0	4	0	4	0	4
Muscat a Petit Grains Blanc	37	0	30	30	37	0	40	40	37	0	40	40
Muscat Gordo Blanco	0	0	4	4	0	0	4	4	0	0	4	4
Other White	133	26	10	36	141	26	25	51	141	26	25	51
Pinot Gris	253	234	76	310	259	273	76	349	259	273	76	349
Riesling	4,404	1,793	1,230	3,023	4,427	1,888	1,045	2,933	4,427	1,888	1,047	2,935
Roussanne	20	13	20	33	27	13	35	48	27	13	35	48
Sauvignon Blanc	457	230	173	403	458	255	194	449	458	255	194	449
Semillon	342	42	232	274	342	42	232	274	342	42	232	274
Traminer	164	26	132	158	164	26	132	158	164	26	132	158
Viognier	324	107	214	321	324	107	214	321	324	107	214	321
Total white winegrapes	**8,266**	**3,318**	**3,004**	**6,322**	**8,312**	**3,649**	**2,774**	**6,423**	**8,312**	**3,695**	**2,355**	**6,050**
All winegrapes	**14,807**	**5,967**	**5,542**	**11,510**	**14,900**	**6,390**	**5,013**	**11,403**	**14,900**	**6,533**	**4,364**	**10,897**

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

[2] *A raising factor of 1.009 has been applied to committed intake to allow for non-respondents*