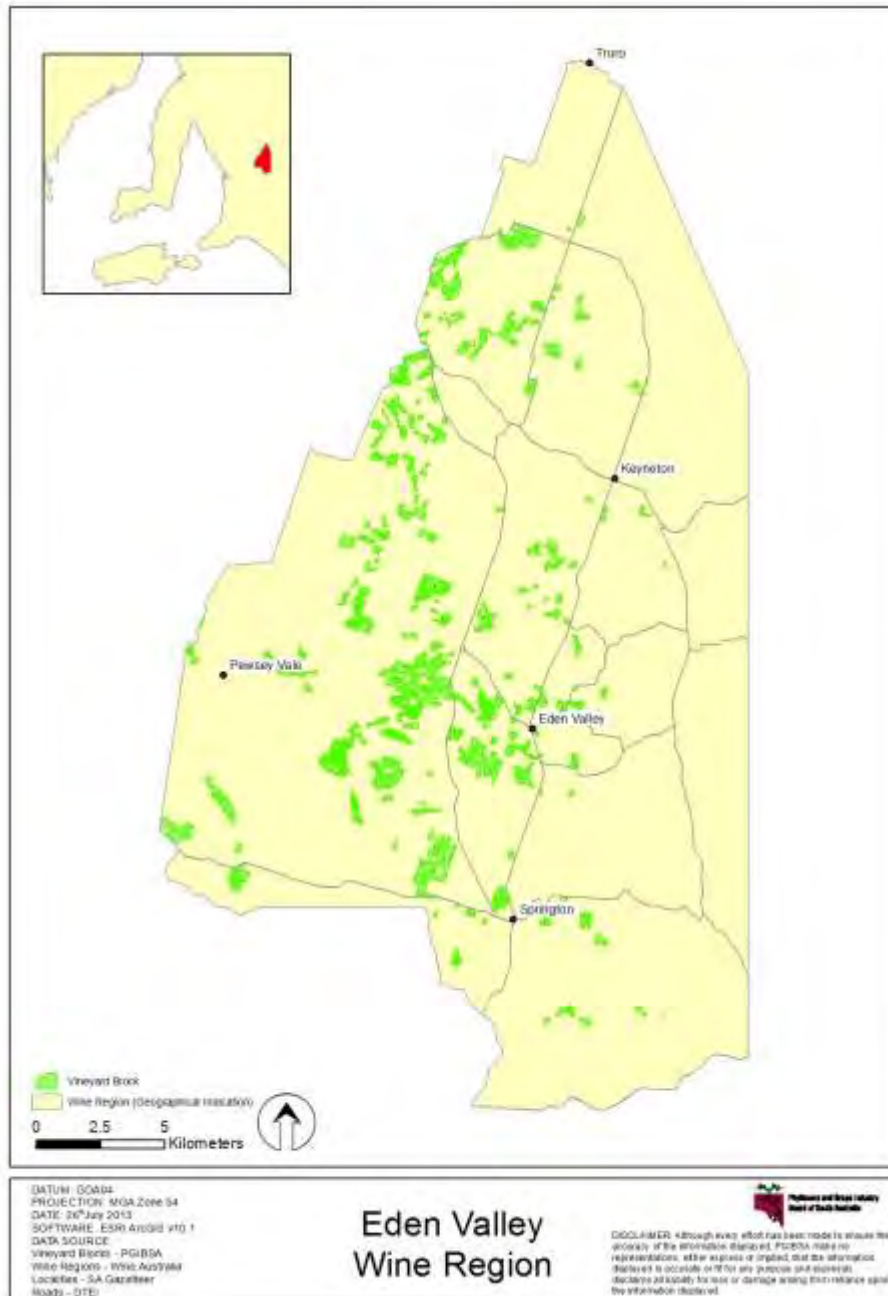


SA Winegrape Crush Survey Regional Summary Report - 2013

Eden Valley Wine Region



Eden Valley

Vintage overview

Vintage report

The dry, early and quick vintage was also experienced in the Eden Valley, with harvest beginning in mid-February with Riesling and other white varieties.

Nine days above 30°C in early March (the 3rd longest run ever of above 30°C days in March), meant that much of the Eden Valley Riesling and Shiraz ripened early and was picked in the first two weeks of March.

Yields were generally below average, but quality looks strong. Riesling harvested early retained both natural acidity and great flavours, while Shiraz is probably the standout red variety from the region.

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 Eden Valley was 9,802 tonnes in 2013, down by 158 tonnes (1.6%) on the 2012 harvest of 9,960 tonnes. The total value of grapes from the region increased slightly from \$12.2 million to \$12.7 million. The average purchase value of the red variety prices increased, with Shiraz up by \$203 per tonne to \$1,926 per tonne and Cabernet Sauvignon up by \$198 per tonne to \$1,478 per tonne. Of the white varieties – Riesling increased by \$22 per tonne to \$1,144 per tonne and Chardonnay decreased by \$15 per tonne to \$790 per tonne.

There were 30 hectares of new plantings in Eden Valley in spring 2012 (including top-working and replacements) compared with 16 hectares planted in 2011. The total area of planted vines in the region increased slightly, stabilising at 2,261 hectares.

The estimated production from Eden Valley for 2014 is 14,700 tonnes, with the wineries' committed intake being 12,800 tonnes. This leaves an estimated 1,900 tonnes (12.9%) of uncommitted fruit.

In 2018, the estimated production is 14,900 tonnes, of which 12,900 tonnes is already under contract or winery grown fruit. This leaves around 2,000 tonnes (15.5%) yet to be contracted or is available on the open market.

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	4			\$7,620	\$1,732	2	7	\$11,768
Cabernet Sauvignon	244	\$750	\$5,730	\$360,396	\$1,478	893	1,136	\$1,679,973
Grenache	12	\$250	\$1,500	\$9,651	\$785	14	26	\$20,710
Mataro	3			\$2,690	\$1,000	24	27	\$26,690
Merlot	115	\$800	\$1,700	\$131,213	\$1,143	210	324	\$370,809
Nebbiolo	0			\$0	\$0	7	7	\$12,621
Other red	5	\$900	\$2,000	\$8,160	\$1,551	5	10	\$15,730
Petit Verdot	0			\$0	\$0	45	45	\$78,852
Pinot Noir	126	\$850	\$1,500	\$146,753	\$1,165	204	330	\$384,335
Shiraz	1,126	\$1,100	\$8,500	\$2,172,996	\$1,929	1,033	2,159	\$4,165,178
Tempranillo	0			\$0	\$0	8	8	\$13,619
Total Red winegrapes	1,636			\$2,839,479		2,445	4,080	\$6,780,286
WHITE								
Chardonnay	502	\$325	\$1,500	\$396,407	\$790	781	1,283	\$1,013,880
Marsanne	0			\$0	\$0	1	1	\$1,352
Muscat A Petit Grains Blanc	22			\$21,422	\$954	0	22	\$21,422
Other white	7			\$7,238	\$1,097	70	76	\$83,616
Pinot Gris	88	\$1,000	\$1,400	\$102,967	\$1,169	230	318	\$371,974
Riesling	1,327	\$700	\$2,200	\$1,517,637	\$1,144	1,789	3,116	\$3,564,737
Roussanne	0			\$0	\$0	1	1	\$1,040
Sauvignon Blanc	188	\$250	\$1,000	\$156,404	\$830	217	405	\$336,551
Semillon	150	\$450	\$1,500	\$115,053	\$766	21	171	\$131,141
Traminer	52	\$750	\$1,200	\$54,787	\$1,046	10	63	\$65,378
Viognier	131			\$194,266	\$1,484	133	264	\$392,242
Total White winegrapes	2,467			\$2,566,181		3,254	5,722	\$5,983,334
Grand Total All winegrapes	4,103			\$5,405,659		5,699	9,802	\$12,763,620

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 3.5%.

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2012
	Pre-2010	2010	2011	2012		
Red winegrapes						
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	293	4	1	1	299	0%
Grenache	21	0	0	0	21	0%
Mataro (Mourvedre)	10	0	0	0	10	0%
Merlot	79	1	0	0	79	0%
Meunier (Pinot Meunier)	1	0	0	0	2	0%
Other Red	7	0	2	1	9	9%
Petit Verdot	11	0	0	0	11	0%
Pinot Noir	60	0	0	0	60	0%
Sangiovese	2	0	0	0	2	0%
Shiraz	677	2	3	21	704	3%
Tempranillo	4	0	5	1	10	13%
Total red varieties	1,168	7	12	24	1,211	2%
White winegrapes						
Chardonnay	267	0	0	0	267	0%
Muscat A Petit Grains Blanc	6	0	0	1	7	13%
Other White	9	0	2	0	11	0%
Pinot Gris	36	1	0	0	37	0%
Riesling	539	7	0	0	546	0%
Roussanne	3	0	2	0	6	0%
Sauvignon Blanc	55	0	0	5	60	8%
Savagnin	3	0	0	0	3	0%
Semillon	36	0	0	0	36	0%
Traminer (Gewurztraminer)	21	0	0	0	21	0%
Viognier	41	0	0	0	41	0%
Total white varieties	1,017	9	4	5	1,036	1%
Unknown variety	14	0	0	0	14	0%
Total all varieties	2,199	16	16	30	2,261	1%

Eden 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	23	3	8	11	23	3	8	11	23	3	8	11
Cabernet Sauvignon	1,186	966	377	1,343	1,194	966	347	1,313	1,194	974	322	1,296
Grenache	104	25	19	44	104	25	19	44	104	25	19	44
Mataro	50	30	2	33	50	30	2	33	50	30	2	33
Merlot	396	288	130	418	397	288	139	427	397	288	139	427
Nebbiolo	0	5	0	5	0	5	0	5	0	5	0	5
Other red	88	17	2	19	92	23	2	25	92	24	2	26
Petit Verdot	55	51	0	51	55	51	0	51	55	51	0	51
Pinot Noir	539	252	209	461	540	252	210	462	540	252	210	462
Shiraz	4,082	1,390	1,547	2,936	4,152	1,444	1,524	2,968	4,152	1,493	1,533	3,026
Tempranillo	31	26	0	26	40	38	0	38	40	38	0	38
Total red winegrapes	6,553	3,053	2,295	5,348	6,647	3,126	2,252	5,378	6,647	3,183	2,236	5,419
White winegrapes												
Chardonnay	2,136	968	1,273	2,241	2,136	1,028	1,331	2,359	2,136	1,050	1,329	2,379
Marsanne	0	3	0	3	0	3	0	3	0	3	0	3
Muscat A Petit Grains Blanc	36	0	34	34	39	0	44	44	39	0	44	44
Other white	143	47	36	84	145	47	57	104	145	47	57	104
Pinot Gris	259	246	304	550	261	263	405	668	261	263	405	668
Riesling	4,354	2,040	1,309	3,349	4,372	2,065	1,025	3,090	4,372	2,080	1,047	3,128
Roussanne	27	2	0	2	29	2	0	2	29	2	0	2
Sauvignon Blanc	442	261	229	490	461	261	234	495	461	261	234	495
Semillon	291	27	232	260	291	27	212	240	291	27	202	229
Traminer	167	22	111	133	167	22	93	115	167	23	93	116
Viognier	325	141	154	295	325	141	154	295	325	141	154	295
Total white winegrapes	8,179	3,757	3,684	7,441	8,227	3,860	3,555	7,416	8,227	3,898	3,566	7,464
All winegrapes	14,733	6,810	5,978	12,789	14,874	6,986	5,808	12,794	14,874	7,081	5,802	12,883

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

² A raising factor of 1.011 has been applied to committed intake to allow for non-respondents