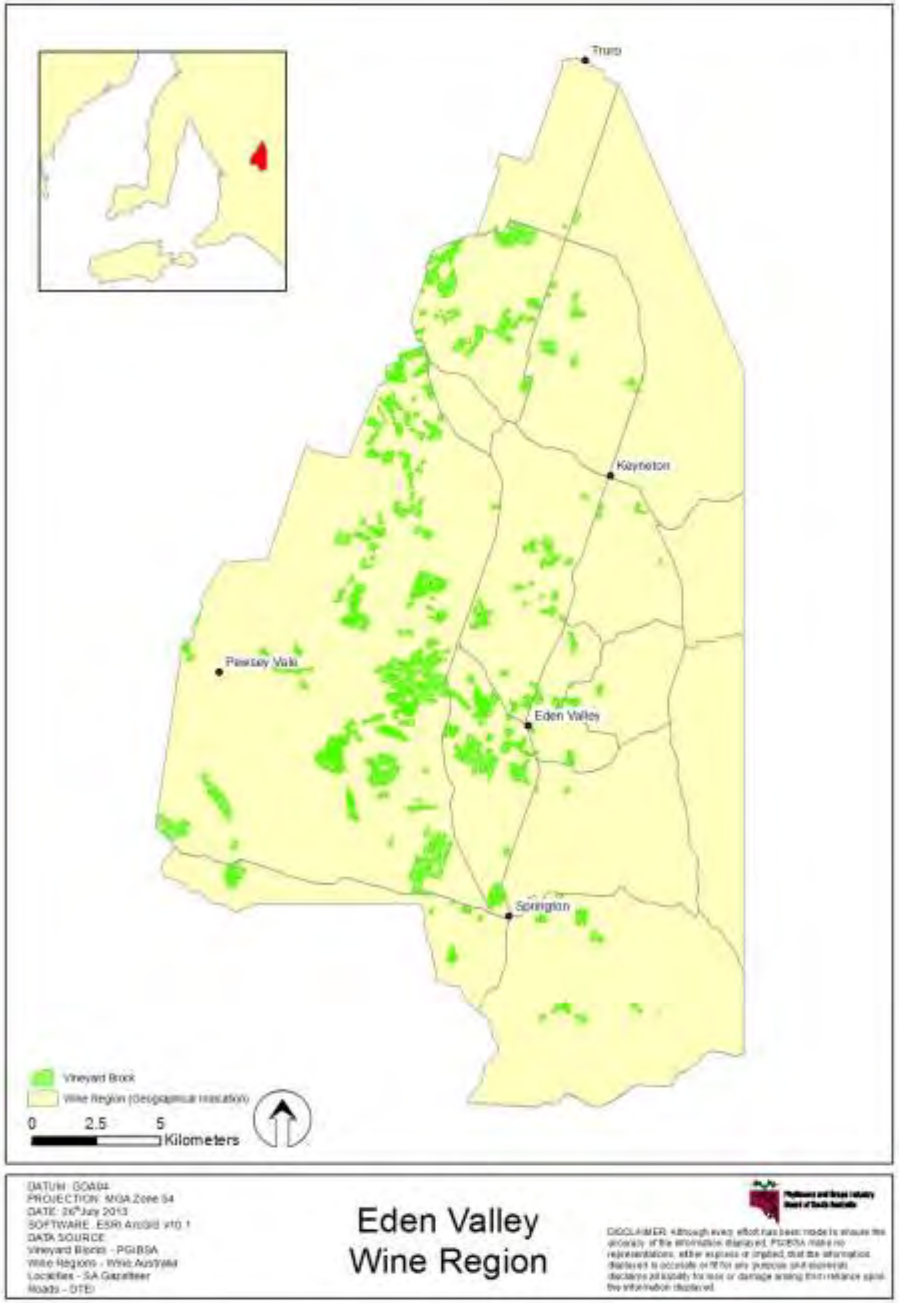

SA Winegrape Crush Survey

Regional Summary Report - 2014

Eden Valley Wine Region

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 and committed intake

The estimated supply and committed intake report has been removed from the 2014 Winegrape Crush Survey. It has been identified that the methodology used to determine the estimated supply requires review.

To assist industry stakeholders gain an understanding of state and regional estimated supply, the last 5 years actual total tonnes crushed at the state level and each region has been averaged. A range is then provided using the highest and lowest figures from the actual tonnes crushed.

The estimated committed intake is the amount of fruit that wineries are already committed to take in, for 2015. 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 cont.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2014 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 2014 and include all plantings from the 2013 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 2013 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 zero (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

Like the Barossa Valley, good winter and early spring rains in Eden Valley filled the soils and set the vines up well for the season. July-Sept rainfall was 36% above average.

After an average September rainfall, October had only 85% and November 24% of average rainfall in Eden Valley.

Eden Valley also experienced cold nights and unseasonal frosts in November, resulting in almost complete loss of fruit in some vineyards – and poor fruit set in others.

On 17 January, a north wind flared up a fire (caused by lightning strike three days earlier) two kilometres west of the town of Eden Valley. It came very close to Keyneton and then Truro, but was eventually controlled by about 200 CFS units and water bombing aircraft. The fire was to the east of the vineyards and wineries of the Eden and Barossa Valleys, which escaped both immediate damage and smoke taint.

Like the Barossa Valley, Eden Valley experienced 100 to 150 mm of rain in just over 24 hours over Valentine's Day.

Harvest in the Eden Valley was underway by the end of February, like the Barossa Valley with generally with lower than average crops, but plenty of flavour and acid. Wind and frost caused vines poor set in most Barossa vineyards, and the hot, dry summer led to smaller than average berry size.

At this early stage quality is looking very good. Eden Valley whites, which mostly veraised after the heat, have retained fine flavours and great natural acidity.

Louisa Rose, Chief Winemaker, Yalumba Wine Company

Overview of vintage statistics

Please note: there was an estimated non-response rate of 26% and readers are cautioned to take this into account when considering the data tables

The harvest from Eden Valley was 6,460 tonnes in 2014, down by 3,342 tonnes (34.1%) on the 2012 harvest of 9,802 tonnes and for the second year in a row, a lower crush was recorded for this region. The total value of grapes from the region decreased from $12.7 million to $9.1 million. The average purchase value of the red variety prices increased, with Shiraz up by $289 per tonne to $2,218 per tonne and Cabernet Sauvignon up by $171 per tonne to $1,649 per tonne. Of the white varieties – Riesling increased by $89 per tonne to $1,233 per tonne and Chardonnay for the second year, continued to decrease in price by $26 per tonne to $764 per tonne.

There were 16 hectares of new plantings in Eden Valley in spring 2013 (including top-working and replacements) compared with 30 hectares planted in 2012. Of the new plantings Shiraz accounted for 37.5%, whilst Cabernet Sauvignon accounted for 25%. The total area of planted vines in the region increased slightly again for a second year in a row to 2,264 hectares.

Over the last 5 years, the average Eden Valley production was 10,277 tonnes, with a low of 8,486 tonnes in 2009 and a high of 12,262 tonnes in 2011. The 2014 crush is down by 59.1% against the last 5 year average. For 2015, the estimated committed intake is 10,644 tonnes.

Eden Valley

Winegrape intake summary - vintage 2014

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	6			$10,260	$1,800	1	7	$11,934
Cabernet Sauvignon	217	$750	$5,730	$358,257	$1,649	506	723	$1,191,661
Grenache	11	$250	$2,500	$16,686	$1,535	9	20	$30,225
Mataro	4			$5,541	$1,548	12	16	$24,269
Merlot	49	$800	$1,200	$47,784	$970	163	213	$206,277
Other red	4			$3,507	$979	54	58	$100,156
Pinot Noir	64	$600	$1,500	$63,309	$991	62	126	$124,804
Shiraz	712	$700	$8,500	$1,578,979	$2,218	709	1,420	$3,150,776
Tempranillo	4			$12,702	$2,900	16	20	$57,652
Total Red winegrapes	**1,070**			**$2,097,024**		**1,531**	**2,601**	**$4,897,755**
WHITE								
Chardonnay	440	$575	$2,050	$335,985	$764	452	892	$681,286
Muscat A Petit Grains Blanc	11	$700	$800	$8,168	$776	0	11	$8,168
Other white	0			$0	$0	35	35	$38,046
Pinot Gris	42	$1,000	$1,200	$45,273	$1,078	91	133	$143,872
Riesling	910	$600	$2,200	$1,121,663	$1,233	1,008	1,917	$2,364,014
Roussanne	16			$26,492	$1,697	4	20	$33,450
Sauvignon Blanc	150	$550	$1,000	$145,058	$965	169	319	$308,350
Semillon	187	$425	$1,500	$140,078	$747	40	228	$170,206
Traminer	73	$750	$1,200	$69,821	$959	9	82	$78,196
Viognier	105			$185,548	$1,764	116	221	$389,954
Total White winegrapes	**1,934**			**$2,078,086**		**1,925**	**3,858**	**$4,215,543**
Grand Total All winegrapes	**3,004**			**$4,175,111**		**3,456**	**6,460**	**$9,113,299**

1 Lowest and highest prices are only reported when there are at least three purchasers. Very low or high 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 26%.

Eden Valley

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2011*	*2011*	*2012*	*2013*	*Total area*	*% planted in 2013*
Red winegrapes						
Cabernet Franc	5	0	0	0	5	*0%*
Cabernet Sauvignon	296	1	1	4	303	*1%*
Grenache	20	0	0	0	20	*0%*
Mataro (Mourvedre)	10	0	0	0	10	*0%*
Merlot	78	0	0	0	78	*0%*
Other Red	9	2	1	1	13	*6%*
Petit Verdot	11	0	0	0	11	*0%*
Pinot Noir	60	0	0	0	60	*0%*
Shiraz	677	5	21	6	710	*1%*
Tempranillo	4	5	1	0	10	*0%*
Total red varieties	**1,169**	**14**	**24**	**12**	**1,219**	***1%***
White winegrapes						
Chardonnay	264	0	0	1	265	*0%*
Muscat A Petit Grains Blanc (White Frontignac)	6	0	1	0	7	*7%*
Other White	15	3	0	0	19	*0%*
Pinot Gris	39	0	0	1	40	*3%*
Riesling	546	0	0	0	546	*0%*
Sauvignon Blanc	60	0	2	0	63	*0%*
Semillon	29	0	0	0	29	*0%*
Traminer (Gewurztraminer)	18	0	0	2	20	*8%*
Viognier	41	0	0	0	41	*0%*
Total white varieties	**1,020**	**3**	**3**	**5**	**1,031**	***0%***
Unknown variety	14	0	0	0	14	*0%*
Total all varieties	**2,202**	**17**	**28**	**16**	**2,264**	***1%***