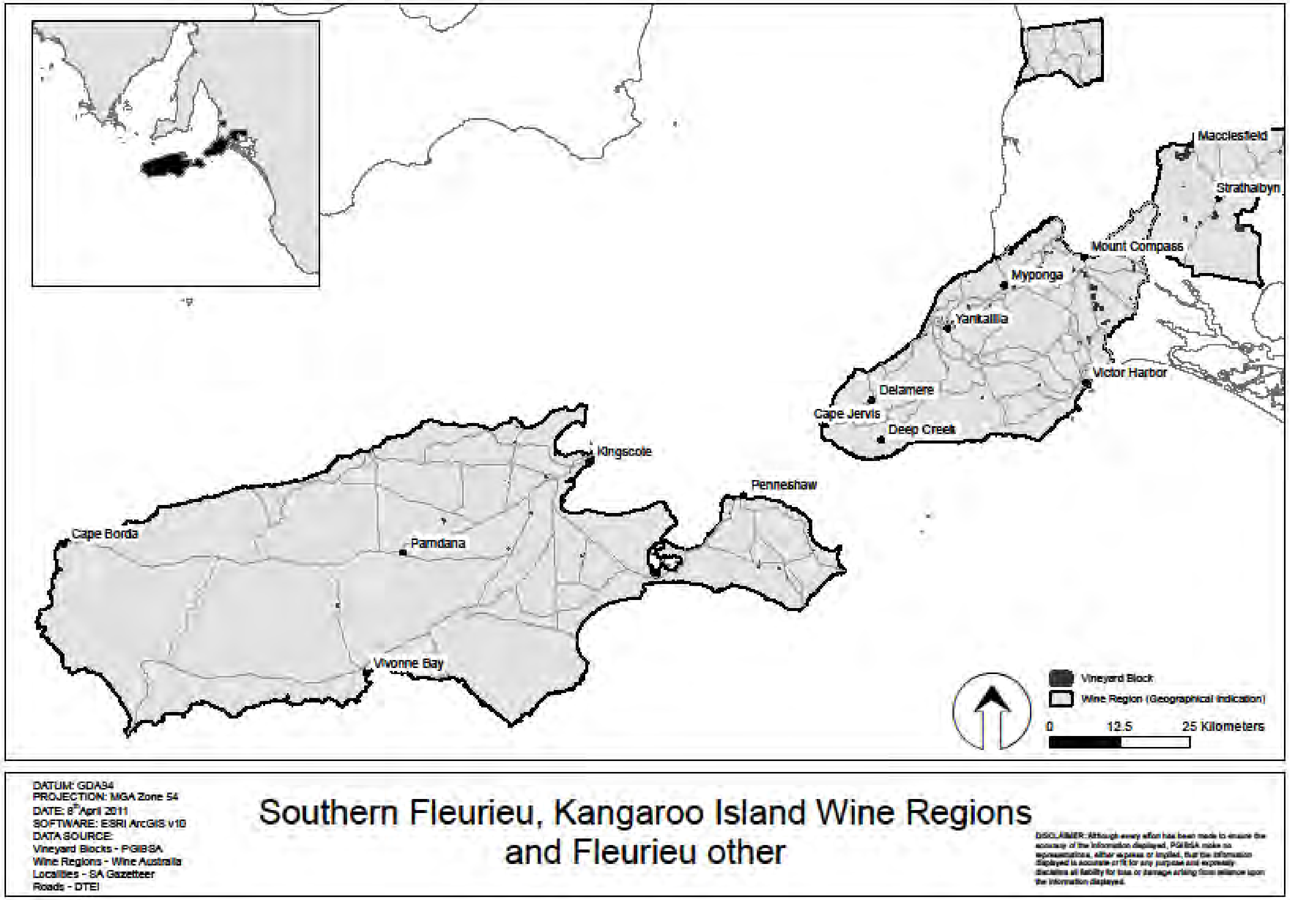
Fleurieu zone - other

Regional summary report 2012

Fleurieu zone (other) includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are near but outside the larger GI regions of Currency Creek, McLaren Vale and Langhorne Creek (referred to as "Fleurieu zone (other)" in tables). The total area of vines included in this definition is 913 hectares.



Overview of vintage statistics

The harvest from Fleurieu zone (other) was 3,400 tonnes in 2012 – 32.7% up on the 2011 harvest. The total estimated value of grapes from these vineyards increased from $1.8 million to $2.2 million in 2012.

There were no new plantings in this area in spring 2011.

The estimated production for this area in 2013 is around 5,800 tonnes. The wineries' committed intake is 3,374 tonnes, leaving around 2,500 tonnes of uncommitted fruit.

The production forecast does not increase significantly over the five year projection period, but the wineries' committed intake decreases to 1,222 tonnes by 2017, leaving at least 4,500 tonnes of fruit likely to be available on the open market.

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.

Fleurieu zone - other

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								
Cabernet Sauvignon	378	$450	$1,600	$310,411	$820	24	402	$329,723
Grenache	52			$14,450	$276	0	52	$14,450
Mataro	41			$10,970	$265	0	41	$10,970
Merlot	95	$500	$750	$62,664	$658	26	121	$79,879
Other Red	0			$0	$0	4	4	$2,914
Pinot Noir	25			$12,500	$500	8	33	$16,700
Shiraz	1,173	$450	$2,000	$864,804	$738	45	1,217	$897,815
Tempranillo	7			$11,434	$1,600	0	7	$11,434
Zinfandel	9			$4,266	$450	0	9	$4,266
Total Red winegrapes	**1,782**			**$1,291,498**		**107**	**1,888**	**$1,368,150**
WHITE								
Chardonnay	691	$400	$1,150	$331,122	$479	18	709	$339,602
Other White	0			$0	$0	14	14	$7,593
Pinot Gris	336			$201,780	$600	9	345	$206,890
Riesling	72			$47,512	$664	1	72	$47,844
Sauvignon Blanc	295	$400	$1,500	$172,503	$585	10	305	$178,356
Semillon	14			$5,061	$350	10	24	$8,554
Viognier	50			$50,280	$1,000	2	52	$52,280
Total White winegrapes	**1,458**			**$808,258**		**62**	**1,521**	**$841,119**
Total All winegrapes	**3,240**			**$2,099,756**		**169**	**3,409**	**$2,209,270**

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 Fleurieu Zone other is 0.0%.

Fleurieu zone (other)

Current plantings by variety and year planted

Southern Fleurieu

	Current area in hectares					
Variety	*Pre-2009*	*2009*	*2010*	*2011*	*Total area*	*% planted in 2011*
Cabernet Sauvignon	82	0	0	0	82	*0%*
Merlot	38	0	0	0	38	*0%*
Other red	7	0	0	0	7	*0%*
Pinot Noir	32	0	0	0	32	*0%*
Shiraz	124	0	0	0	124	*0%*
Chardonnay	96	0	0	0	96	*0%*
Other white	4	0	0	0	4	*0%*
Pinot Gris	29	0	0	0	29	*0%*
Riesling	8	0	0	0	8	*0%*
Sauvignon Blanc	76	0	0	0	76	*0%*
Semillon	22	0	0	0	22	*0%*
Verdelho	4	0	0	0	4	*0%*
Viognier	12	0	0	0	12	*0%*
Unknown variety	3	0	0	0	3	*0%*
Total all varieties	**538**	**0**	**0**	**0**	**538**	***0%***

Kangaroo Island

	Current area in hectares					
Variety	*Pre-2009*	*2009*	*2010*	*2011*	*Total area*	*% planted in 2011*
Cabernet Franc	6	0	0	0	6	*0%*
Cabernet Sauvignon	46	0	0	0	46	*0%*
Merlot	5	0	0	0	5	*0%*
Other red	6	1	0	0	7	*0%*
Shiraz	51	0	0	0	51	*0%*
Chardonnay	10	0	0	0	10	*0%*
Other white	2	3	0	0	5	*0%*
Riesling	3	0	0	0	3	*0%*
Sauvignon Blanc	7	0	0	0	7	*0%*
Unknown variety	3	0	0	0	3	*0%*
Total all varieties	**139**	**3**	**0**	**0**	**142**	***0%***

Fleurieu zone - other

	Current area in hectares					
Variety	*Pre-2009*	*2009*	*2010*	*2011*	*Total area*	*% planted in 2011*
Cabernet Sauvignon	34	0	0	0	34	*0%*
Other red	6	0	0	0	6	*0%*
Shiraz	88	0	0	0	88	*0%*
Chardonnay	29	0	0	0	29	*0%*
Pinot Gris	12	0	0	0	12	*0%*
Sauvignon Blanc	16	0	0	0	16	*0%*
Other white	13	0	0	0	13	*0%*
Unknown	34	0	0	0	34	*0%*
Total all varieties	**232**	**0**	**0**	**0**	**232**	***0%***
Total Fleurieu zone (other)	**909**	**4**	**0**	**0**	**913**	***0%***

Fleurieu zone - other

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												
Cabernet Sauvignon	18	55	142	197	890	57	89	146	890	57	53	110
Grenache	0	0	60	60	0	0	66	66	0	0	66	66
Mataro	0	0	48	48	0	0	48	48	0	0	48	48
Merlot	9	45	58	103	247	45	58	103	247	45	58	103
Other Red	19	0	0	0	313	0	0	0	313	0	0	0
Pinot Noir	6	24	0	24	193	12	0	12	193	24	0	24
Sangiovese	0	2	0	2	0	4	0	4	0	4	0	4
Shiraz	20	64	1,375	1,439	1,900	64	1,308	1,372	1,900	64	411	475
Tempranillo	0	0	10	10	0	0	10	10	0	0	10	10
Zinfandel	0	0	11	11	0	0	11	11	0	0	11	11
Total red winegrapes	**75**	**191**	**1,702**	**1,893**	**3,561**	**181**	**1,589**	**1,770**	**3,561**	**193**	**656**	**850**
White winegrapes												
Chardonnay	19	31	575	606	804	31	563	594	804	31	38	69
Other White	19	16	0	16	338	16	0	16	338	16	0	16
Pinot Gris	15	18	318	336	308	18	318	336	308	18	0	18
Riesling	9	1	0	1	52	1	0	1	52	1	0	1
Sauvignon Blanc	19	21	369	391	539	21	329	350	539	21	47	69
Semillon	5	74	0	74	112	74	0	74	112	74	0	74
Viognier	5	4	123	126	59	4	123	126	59	4	123	126
Total white winegrapes	**96**	**164**	**1,385**	**1,549**	**2,232**	**164**	**1,333**	**1,497**	**2,232**	**164**	**208**	**372**
All winegrapes	**171**	**355**	**3,087**	**3,442**	**5,793**	**345**	**2,922**	**3,267**	**5,793**	**357**	**865**	**1,222**

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

[2] *A raising factor of 1.192 has been applied to committed intake to allow for non-respondents*