

SA Winegrape Crush Survey Regional Summary Report - 2014

Fleurieu zone (other) 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 receipt – 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.

Fleurieu zone (other)

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 966 hectares.

Vintage overview

Overview of vintage statistics

The harvest from Fleurieu zone (other) region was 2,869 tonnes in 2014, slightly up by 38 tonnes (1.3%) on the 2013 harvest of 2,831 tonnes. There was an estimated non-response rate of 0% across the region. The total estimated value of grapes from these vineyards slightly decreased from \$2.3 million to \$2.2 million. The average purchase price for the red varieties decreased, with Shiraz down by \$181 per tonne to \$765 per tonne and Cabernet Sauvignon down by \$87 per tonne to \$955 per tonne. Of the white varieties – Chardonnay is up by \$32 per tonne to \$591 per tonne, whilst Pinot Gris decreased by \$19 per tonne to \$802 per tonne.

There were 10 hectares of new plantings in the Fleurieu zone region in spring 2013 (including top-working and replacements). Shiraz accounted for all of the new plantings. The total planted area of vines in the region decreased by 8 hectares (< 1%) to 966 hectares, compared with an increase of 31 hectares (3.5%) in 2011.

Over the last 5 years, the average Fleurieu zone (other) production was 3,048 tonnes, with a low of 2,293 tonnes in 2011 and a high of 3,937 tonnes in 2009. The 2014 crush is down by 6.2% against the last 5 year average. For 2015, the estimated committed intake is 2,772 tonnes.

Fleurieu zone - (other)

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 Sauvignon	243	\$550	\$2,700	\$231,850	\$955	21	264	\$251,784
Merlot	46			\$29,318	\$644	22	68	\$43,581
Pinot Noir	12			\$10,285	\$850	4	16	\$13,830
Sangiovese	0			\$0	\$0	1	1	\$791
Shiraz	1,330	\$500	\$1,800	\$1,016,783	\$765	20	1,349	\$1,031,847
Tempranillo	1			\$1,800	\$1,490	10	11	\$15,956
Total Red winegrapes	1,631			\$1,290,036		77	1,709	\$1,357,788
WHITE								
Chardonnay	429	\$400	\$1,200	\$253,681	\$591	26	455	\$268,866
Muscat A Petit Grains Blanc	3			\$3,473	\$1,200	0	3	\$3,473
Pinot Gris	356	\$750	\$1,400	\$285,567	\$802	10	366	\$293,649
Riesling	3			\$4,500	\$1,500	3	6	\$8,297
Sauvignon Blanc	295	\$700	\$1,200	\$218,491	\$741	18	313	\$231,574
Semillon	0			\$0	\$0	11	11	\$7,776
Traminer	2			\$1,660	\$1,000	0	2	\$1,660
Viognier	3			\$3,895	\$1,200	2	5	\$6,295
Total White winegrapes	1,091			\$771,267		69	1,160	\$821,591
Grand Total All winegrapes	2,722			\$2,061,303		146	2,869	\$2,179,379

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 Fleurieu zone - other is 0%.

Fleurieu zone (other)

Current plantings by variety and year planted

		Current area in hectares				% planted	
		Pre-2011	2011	2012	2013	Total area	in 2013
Southern Fleurieu	Variety						
	Cabernet Sauvignon	76	0	2	0	78	0%
	Merlot	35	0	0	0	35	0%
	Other Red	6	0	0	0	6	0%
	Pinot Noir	28	0	1	0	29	0%
	Shiraz	120	0	0	6	126	4%
	Chardonnay	92	0	0	0	92	0%
	Other White	4	0	0	0	4	0%
	Pinot Gris	27	0	0	0	27	0%
	Riesling	3	0	0	0	3	0%
	Sauvignon Blanc	72	0	0	0	72	0%
	Semillon	22	0	0	0	22	0%
	Verdelho	1	0	0	0	1	0%
	Viognier	10	0	0	0	10	0%
	Unknown variety	3	0	0	0	3	0%
Total all varieties		501	0	4	6	510	1%

		Current area in hectares				% planted	
		Pre-2011	2011	2012	2013	Total area	in 2013
Kangaroo Island	Variety						
	Cabernet Franc	5	0	0	0	5	0%
	Cabernet Sauvignon	43	0	0	0	43	0%
	Merlot	5	0	0	0	5	0%
	Other Red	7	0	0	0	7	0%
	Shiraz	50	0	0	0	50	0%
	Chardonnay	10	0	0	0	10	0%
	Other White	4	0	0	0	4	0%
	Riesling	3	0	0	0	3	0%
	Sauvignon Blanc	7	0	0	0	7	0%
	Unknown variety	5	0	0	0	5	0%
Total all varieties		140	0	0	0	140	0%

		Current area in hectares				% planted	
		Pre-2011	2011	2012	2013	Total area	in 2013
Fleurieu zone - other	Variety						
	Cabernet Sauvignon	34	0	2	0	37	0%
	Other Red	19	0	2	0	22	0%
	Shiraz	119	0	4	4	128	3%
	Chardonnay	29	0	0	0	29	0%
	Other White	11	0	0	0	11	0%
	Pinot Gris	26	0	0	0	26	0%
	Sauvignon Blanc	30	0	0	0	30	0%
	Unknown variety	34	0	0	0	34	0%
Total all varieties		302	0	9	4	316	1%

Total Fleurieu zone (other)	943	0	13	10	966	1%
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