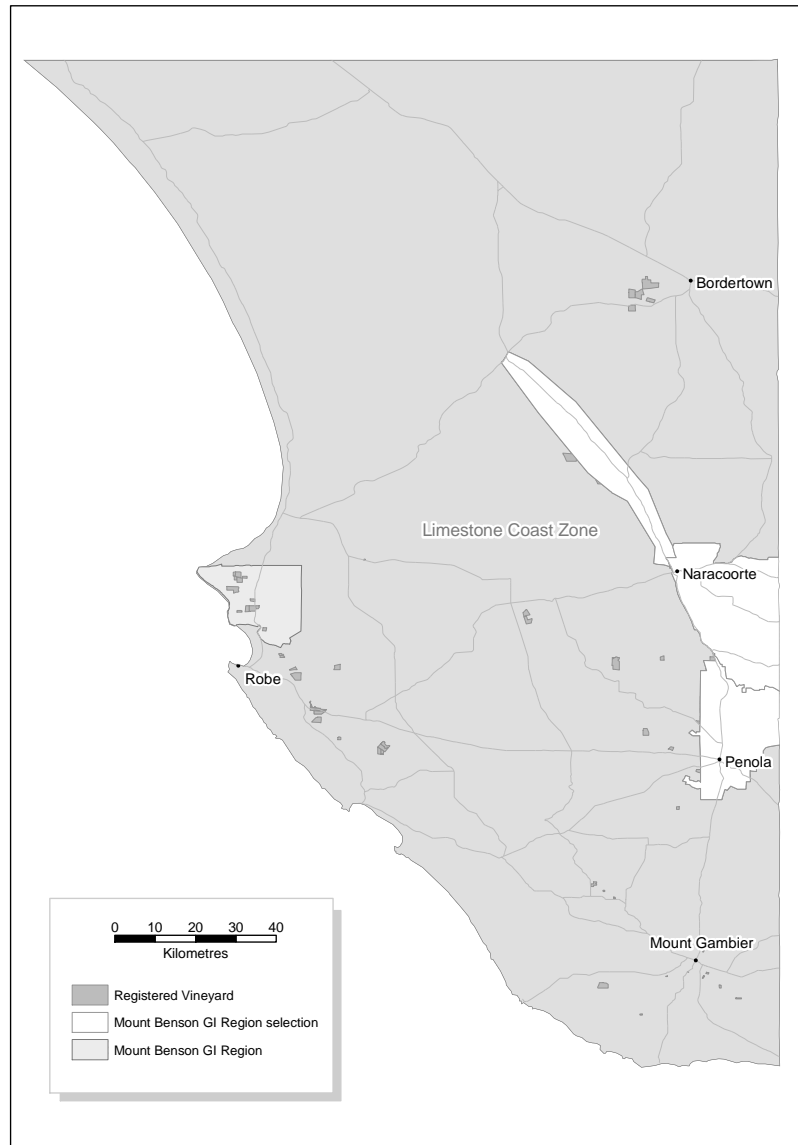


LIMESTONE COAST ZONE (OTHER) VINTAGE OVERVIEW



Overview of vintage statistics

Limestone Coast (other) includes the plantings around Bordertown, Mt Benson, Robe, Lucindale, Beachport, Mount Gambier and plantings near but outside the declared GI regions of Padthaway, Coonawarra and Wrattenbully.

The area accounts for a total of 2881 hectares, and produced 30,183 tonnes in the 2004 vintage. This was double the crush of 2003. There was a substantial surplus in red varieties, with Merlot and Shiraz in particular being around twice the wineries' preferred intake. There was also a surplus of white varieties; however, white varieties only make up 17% of the production of the region.

Projections indicate that intake of red varieties will be around 20,000 tonnes over the next five years (less than the 2004 vintage), and there will be a 100% surplus in each year (ie twice as much as wineries' preferred intake) - mainly in Shiraz. White varieties are expected to grow from 4,000 tonnes in 2005 to around 4,400 tonnes in 2009 and to exceed demand in each forecast year.

There was very little new planting in the Limestone Coast zone (other) in 2003, in line with the lack of forecast growth for this area.

Note: crop value data is not presented in this report for Limestone Coast zone (other) as this is not a single, uniform region. However, the information is available on the Board's website at www.phylloxera.com.au or on request from the office.

LIMESTONE COAST ZONE (OTHER) CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 10.1

Current area in hectares by year planted

| Variety | Pre-1999 | 1999 | 2000 | 2001 | 2002 | 2003 | Total area | % planted in 2003 |
|-------------------------------------|-------------|------------|------------|-----------|-----------|----------|-------------|-------------------|
| MOUNT BENSON | | | | | | | | |
| SHIRAZ | 63 | 14 | 28 | 30 | 23 | 0 | 158 | 0% |
| CABERNET SAUVIGNON | 88 | 21 | 4 | 11 | 4 | 0 | 127 | 0% |
| MERLOT | 14 | 11 | 5 | 15 | 5 | 0 | 50 | 0% |
| CHARDONNAY | 23 | 8 | 0 | 8 | 2 | 5 | 45 | 10% |
| SAUVIGNON BLANC | 10 | 4 | 12 | 8 | 4 | 3 | 41 | 7% |
| OTHER VARIETIES (<5ha each) | 10 | 10 | 6 | 9 | 6 | 0 | 41 | 0% |
| TOTAL ALL VARIETIES | 208 | 68 | 54 | 80 | 45 | 8 | 463 | 2% |
| BORDERTOWN | | | | | | | | |
| CABERNET SAUVIGNON | 191 | 181 | 5 | 53 | 0 | 0 | 430 | 0% |
| SHIRAZ | 129 | 147 | 17 | 14 | 0 | 0 | 307 | 0% |
| MERLOT | 88 | 98 | 48 | 0 | 12 | 0 | 245 | 0% |
| CHARDONNAY | 77 | 0 | 0 | 0 | 23 | 0 | 100 | 0% |
| PETIT VERDOT | 17 | 24 | 5 | 0 | 0 | 0 | 46 | 0% |
| MATARO (MOUVEDRE) | 0 | 24 | 19 | 0 | 0 | 0 | 42 | 0% |
| CABERNET FRANC | 0 | 19 | 0 | 10 | 0 | 0 | 29 | 0% |
| MALBEC | 0 | 10 | 9 | 5 | 0 | 0 | 24 | 0% |
| VERDELHO | 6 | 0 | 5 | 0 | 0 | 0 | 10 | 0% |
| SEMILLON | 10 | 0 | 0 | 0 | 0 | 0 | 10 | 0% |
| OTHER VARIETIES (<5ha each) | 3 | 2 | 0 | 0 | 1 | 2 | 8 | 20% |
| TOTAL ALL VARIETIES | 520 | 506 | 107 | 81 | 36 | 2 | 1252 | 0% |
| LIMESTONE COAST ZONE - OTHER | | | | | | | | |
| CABERNET SAUVIGNON | 440 | 7 | 3 | 7 | 13 | 0 | 470 | 0% |
| SHIRAZ | 210 | 3 | 7 | 11 | 10 | 0 | 241 | 0% |
| CHARDONNAY | 157 | 1 | 0 | 9 | 1 | 0 | 169 | 0% |
| PINOT NOIR | 101 | 8 | 27 | 3 | 0 | 0 | 138 | 0% |
| MERLOT | 80 | 1 | 1 | 4 | 4 | 0 | 91 | 0% |
| SAUVIGNON BLANC | 17 | 0 | 1 | 4 | 0 | 0 | 21 | 0% |
| SEMILLON | 17 | 0 | 0 | 0 | 0 | 0 | 17 | 0% |
| PETIT VERDOT | 9 | 0 | 2 | 0 | 0 | 0 | 11 | 0% |
| OTHER VARIETIES (<5ha each) | 3 | 0 | 1 | 4 | 0 | 0 | 8 | 1% |
| TOTAL ALL VARIETIES | 1034 | 19 | 43 | 42 | 28 | 0 | 1166 | 0% |



LIMESTONE COAST ZONE (OTHER) TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 10.2

| Variety | Total winery grown | Total other growers | Total crushed | Total preferred | Tonnes from other growers as % of total | % of demand supplied | Number of wineries reporting tonnages (> 0) for | | |
|---------------------------|--------------------|---------------------|---------------|-----------------|---|----------------------|---|-------|-----------|
| | | | | | | | Own | Other | Preferred |
| RED | | | | | | | | | |
| Cabernet Franc | 26 | 458 | 484 | 26 | 95% | 1839% | 2 | 1 | 2 |
| Cabernet Sauvignon | 3913 | 5537 | 9450 | 5958 | 59% | 159% | 10 | 20 | 18 |
| Grenache | 13 | 0 | 13 | 13 | 0% | 100% | 1 | 0 | 1 |
| Malbec | 0 | 318 | 318 | 224 | 100% | 142% | 0 | 2 | 1 |
| Mataro (Mouvedre) | 0 | 822 | 822 | 0 | 100% | | 0 | 1 | 0 |
| Merlot | 797 | 2928 | 3725 | 1567 | 79% | 238% | 6 | 14 | 12 |
| Petit Verdot | 116 | 950 | 1066 | 158 | 89% | 674% | 5 | 3 | 7 |
| Pinot Noir | 512 | 763 | 1275 | 1216 | 60% | 105% | 4 | 10 | 9 |
| Shiraz | 1529 | 6039 | 7568 | 3890 | 80% | 195% | 8 | 15 | 15 |
| Tempranillo | 14 | 0 | 14 | 14 | 0% | 100% | 1 | 0 | 1 |
| Total RED | 6919 | 17814 | 24734 | 13067 | 72% | 189% | | | |
| WHITE | | | | | | | | | |
| Chardonnay | 2137 | 1837 | 3974 | 3129 | 46% | 127% | 7 | 12 | 14 |
| Pinot Gris | 28 | 20 | 48 | 52 | 42% | 94% | 1 | 3 | 3 |
| Riesling | 5 | 0 | 5 | 5 | 0% | 100% | 1 | 0 | 1 |
| Sauvignon Blanc | 225 | 363 | 588 | 615 | 62% | 96% | 4 | 9 | 10 |
| Semillon | 358 | 337 | 695 | 696 | 49% | 100% | 3 | 3 | 5 |
| Verdelho | 58 | 69 | 127 | 102 | 54% | 125% | 1 | 3 | 4 |
| Viognier | 0 | 13 | 13 | 22 | 100% | 59% | 0 | 2 | 2 |
| Total WHITE | 2811 | 2639 | 5450 | 4620 | 48% | 118% | | | |
| Total for region | 9730 | 20453 | 30183 | 17687 | | | | | |

LIMESTONE COAST (OTHER) ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 10.4

| Variety | 2005 | | 2006 | | 2007 | | 2008 | | 2009 | |
|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | estimated | preferred | estimated | preferred | estimated | preferred | estimated | preferred | estimated | preferred |
| RED | | | | | | | | | | |
| Cabernet Franc | 424 | 20 | 425 | 21 | 425 | 21 | 425 | 21 | 425 | 21 |
| Cabernet Sauvignon | 6981 | 5134 | 6339 | 4595 | 6219 | 4475 | 6119 | 4375 | 6159 | 4415 |
| Grenache | 16 | 16 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 |
| Malbec | 200 | 0 | 200 | 0 | 200 | 0 | 200 | 0 | 200 | 0 |
| Mataro (Mouvedre) | 800 | 0 | 800 | 0 | 800 | 0 | 800 | 0 | 800 | 0 |
| Merlot | 3553 | 1429 | 3369 | 1245 | 3344 | 1260 | 3294 | 1210 | 3294 | 1210 |
| Petit Verdot | 1053 | 153 | 1036 | 136 | 1036 | 136 | 1036 | 136 | 1036 | 136 |
| Pinot Noir | 498 | 567 | 397 | 460 | 388 | 458 | 388 | 445 | 388 | 445 |
| Shiraz | 7386 | 3595 | 6889 | 3266 | 6869 | 3246 | 6829 | 2706 | 6929 | 2806 |
| Tempranillo | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 |
| Total for RED | 20927 | 10930 | 19490 | 9758 | 19316 | 9631 | 19126 | 8928 | 19266 | 9068 |
| WHITE | | | | | | | | | | |
| Chardonnay | 2883 | 2084 | 2906 | 2103 | 2960 | 2157 | 2835 | 2027 | 2885 | 2077 |
| Pinot Gris | 56 | 56 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 |
| Riesling | 6 | 6 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 |
| Sauvignon Blanc | 526 | 597 | 616 | 668 | 686 | 688 | 726 | 728 | 786 | 788 |
| Semillon | 307 | 322 | 356 | 356 | 272 | 272 | 322 | 322 | 372 | 372 |
| Verdelho | 171 | 165 | 201 | 195 | 251 | 245 | 301 | 295 | 351 | 345 |
| Viognier | 29 | 29 | 29 | 29 | 29 | 29 | 29 | 29 | 29 | 29 |
| Total for WHITE | 3978 | 3259 | 4176 | 3419 | 4266 | 3459 | 4281 | 3469 | 4491 | 3679 |
| Total for region | 24905 | 14189 | 23666 | 13177 | 23582 | 13090 | 23407 | 12397 | 23757 | 12747 |

