



Limestone Coast zone - other

Regional summary report

2011

DATUM: GDA94
 PROJECTION: MGA Zone 54
 DATE: 8 April 2011
 SOFTWARE: ESRI ArcGIS v10
 DATA SOURCE:
 Vineyard Blocks - PGIBSA
 Wine Regions - Wine Australia
 Localities - SA Gazetteer
 Roads - DTE

Mount Benson, Robe, Mt Gambier, and Limestone Coast other Wine Regions

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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

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 2011 South Australian Utilisation and Pricing 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.

Limestone Coast zone (other)

Vintage overview

Limestone Coast zone (other) includes the GI regions of Mt Benson and Robe, and the vineyards around Bordertown, Lucindale, Beachport and Mount Gambier, as well as those near but outside the declared GI regions of Padthaway, Coonawarra and Wrattobully. The total area of vines included in this definition is around 3,300 hectares.

Vintage report

Mount Benson

In Mt Benson, vintage 2011 was cooler than average making for a late season and early phenological stages being a week or two behind the average.

Generally it was a cooler, wetter season with much more rain than average.

Fortunately we only had conditions twice, for a primary infection of downy mildew but powdery mildew conditions were present for most of the season. So these diseases caused problems later in the season particularly after Christmas and in vigorous canopies.

Harvest was a little later than the last few seasons but about normal for an average season.

Quality was good particularly in varieties brought in early that avoided the late season Botrytis caused by all the rain.

Tons were on average as well with some reds slightly down due to disease pressure.

*Nigel Squire, President
Mount Benson Vignerons Association*

Overview of vintage statistics

The harvest from Limestone Coast (other) was 13,610 tonnes in 2011, a 32.5% decrease on the 2010 harvest. The total value of grapes from the region decreased from \$19.5 million to \$10.3 million (46.7%) – with average purchase values for Shiraz and Cabernet Sauvignon decreased by \$279 and \$171 per tonne respectively. Merlot increased again in value by \$74 per tonne, with Chardonnay falling by \$151 per tonne to \$585.

There were only 6 hectares of new plantings across the Limestone Coast zone (other) in spring 2010 (including top-working and replacements).

The estimated production for the Limestone Coast (other) vineyards for 2012 is 27,300 tonnes. The wineries' committed intake is 17,700 tonnes, leaving 9,600 tonnes (35%) of uncommitted fruit.

The estimated supply remains at 27,300 tonnes in 2016, while the wineries' committed intake drops to 13,400 tonnes, leaving close to half the fruit uncommitted by the end of the forecast period.

Limestone Coast zone (other) Winegrape intake summary - vintage 2011

Incorporates Mount Benson (2,744 tonnes), Robe (2,228 tonnes) and Limestone Coast zone - other (8,638 tonnes).

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	0			\$0	\$0	3	3	\$2,398
Cabernet Sauvignon	2,750	\$320	\$1,980	\$2,068,251	\$752	2,479	5,229	\$3,932,517
Malbec	201			\$90,275	\$448	3	204	\$91,619
Mataro	38			\$30,639	\$0	0	38	\$30,639
Merlot	775	\$378	\$1,620	\$797,788	\$1,029	906	1,681	\$1,729,857
Pinot Noir	280	\$500	\$1,201	\$266,391	\$953	138	418	\$397,734
Shiraz	1,386	\$378	\$1,980	\$1,094,524	\$790	513	1,899	\$1,499,568
Total Red winegrapes	5,431			\$4,347,867		4,042	9,473	\$7,684,332
WHITE								
Chardonnay	809	\$425	\$1,350	\$473,542	\$585	1,332	2,141	\$1,253,114
Muscat a Petit Grains Blanc	61			\$44,225	\$725	0	61	\$44,225
Pinot Gris	223			\$163,286	\$731	255	479	\$349,935
Riesling	0			\$0	\$0	30	30	\$20,223
Sauvignon Blanc	632	\$378	\$1,200	\$490,355	\$776	368	1,000	\$776,141
Semillon	156			\$84,498	\$541	176	333	\$179,925
Verdelho	95	\$400	\$800	\$62,573	\$661	0	95	\$62,573
Total White winegrapes	1,976			\$1,318,480		2,162	4,138	\$2,686,135
Total All winegrapes	7,407			\$5,666,347		6,203	13,610	\$10,370,468

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 Limestone Coast zone (other) is 1.9%.

**Limestone Coast zone
(other)**

Current plantings by variety and year planted

Bordertown	Variety	Current area in hectares					Total area	% planted in 2010
		Pre-2008	2008	2009	2010			
	Red winegrapes							
	Cabernet Franc	30	0	0	0	30	0%	
	Cabernet Sauvignon	412	4	0	0	416	0%	
	Malbec	21	0	0	0	21	0%	
	Mataro (Mourvedre)	43	0	0	0	43	0%	
	Merlot	222	0	0	0	222	0%	
	Other red	12	0	0	4	16	25%	
	Petit Verdot	43	0	0	0	43	0%	
	Shiraz	333	0	0	0	333	0%	
	Total red varieties	1,115	4	0	4	1,123	0%	
	White winegrapes							
	Chardonnay	88	0	0	0	88	0%	
	Pinot Gris	12	0	0	0	12	0%	
	Other white	8	0	0	0	8	0%	
	Sauvignon Blanc	8	0	0	0	8	0%	
	Semillon	10	0	0	0	10	0%	
	Verdelho	10	0	0	0	10	0%	
	Total white varieties	136	0	0	0	136	0%	
	Total all varieties	1,251	4	0	4	1,259	0%	

Mount Benson	Variety	Current area in hectares					Total area	% planted in 2010
		Pre-2008	2008	2009	2010			
	Red winegrapes							
	Cabernet Franc	3	0	0	0	3	0%	
	Cabernet Sauvignon	116	0	0	0	116	0%	
	Merlot	52	0	0	0	52	0%	
	Petit Verdot	2	0	0	0	2	0%	
	Pinot Noir	2	0	0	0	2	0%	
	Shiraz	165	0	0	0	165	0%	
	Total red varieties	339	0	0	0	339	0%	
	White winegrapes							
	Chardonnay	38	0	0	0	38	0%	
	Other white	17	0	0	0	17	0%	
	Pinot Gris	30	12	0	0	42	0%	
	Sauvignon Blanc	60	5	0	2	67	3%	
	Total white varieties	145	17	0	2	164	1%	
	Total all varieties	484	17	0	2	503	0%	

**Limestone Coast zone
(other)**

Current plantings by variety and year planted

Robe	Variety	Current area in hectares					Total area	% planted in 2010
		Pre-2008	2008	2009	2010			
	Red winegrapes							
	Cabernet Sauvignon	234	0	0	0	234	0%	
	Malbec	2	0	0	0	2	0%	
	Merlot	58	0	0	0	58	0%	
	Petit Verdot	8	0	0	0	8	0%	
	Pinot Noir	64	0	0	0	64	0%	
	Shiraz	175	0	0	0	175	0%	
	Total red varieties	540	0	0	0	540	0%	
	White winegrapes							
	Chardonnay	136	0	0	0	136	0%	
	Pinot Gris	15	0	0	0	15	0%	
	Sauvignon Blanc	39	0	0	0	39	0%	
	Savagnin Blanc	5	0	0	0	5	0%	
	Semillon	12	0	0	0	12	0%	
	Total white varieties	207	0	0	0	207	0%	
	Total all varieties	747	0	0	0	747	0%	

Other Limestone Coast zone

Variety	Current area in hectares					Total area	% planted in 2010
	Pre-2008	2008	2009	2010			
Red winegrapes							
Cabernet Franc	2	0	0	0	2	0%	
Cabernet Sauvignon	344	0	6	0	350	0%	
Merlot	45	0	0	0	45	0%	
Petit Verdot	3	0	0	0	3	0%	
Pinot Noir	10	0	0	0	10	0%	
Shiraz	136	0	0	0	136	0%	
Total red varieties	541	0	6	0	547	0%	
White winegrapes							
Chardonnay	41	0	0	0	41	0%	
Pinot Gris	0	0	1	0	1	0%	
Riesling	4	0	0	0	4	0%	
Sauvignon Blanc	9	0	0	0	9	0%	
Total white varieties	54	0	1	0	55	0%	
Total all varieties	595	0	7	0	602	0%	

Current area in hectares

**Limestone Coast zone
(other)**

Current plantings by variety and year planted

Mount Gambier	Variety	<i>Pre-2008</i>	<i>2008</i>	<i>2009</i>	<i>2010</i>	<i>Total area</i>	<i>% planted in 2010</i>
	Red winegrapes						
	Cabernet Franc	0	0	0	0	0	0%
	Cabernet Sauvignon	13	0	0	0	13	0%
	Merlot	1	0	0	0	1	0%
	Pinot Noir	71	0	0	0	71	0%
	Shiraz	0	0	0	0	0	0%
	Total red varieties	86	0	0	0	86	0%
	White winegrapes						
	Chardonnay	37	0	0	0	37	0%
	Pinot Gris	21	0	0	0	21	0%
	Riesling	5	0	0	0	5	0%
	Sauvignon Blanc	81	10	1	0	92	0%
	Semillon	1	0	0	0	1	0%
	Viognier	1	0	0	0	1	0%
	Total white varieties	146	10	1	0	157	0%
	Total all varieties	232	10	1	0	243	0%

**Limestone Coast
zone - other**

Estimated supply and committed intake 2012 - 2016

Variety	2012				2014				2016			
	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	322	6	169	175	322	6	169	175	322	6	169	175
Cabernet Sauvignon	8,001	2,926	2,956	5,882	8,001	2,930	1,958	4,887	8,001	2,930	1,730	4,660
Malbec	229	3	396	399	229	3	328	331	229	3	328	331
Mataro	382	0	253	253	382	0	253	253	382	0	253	253
Merlot	3,363	1,217	1,347	2,564	3,363	1,217	1,253	2,470	3,363	1,217	1,253	2,470
Petit Verdot	528	50	209	259	528	50	209	259	528	50	209	259
Pinot Noir	998	158	341	498	998	158	265	423	998	158	0	158
Shiraz	6,891	1,298	2,452	3,750	6,891	1,299	1,751	3,050	6,891	1,300	1,294	2,594
Tempranillo	0	10	0	10	0	10	0	10	0	10	0	10
Total red winegrapes	20,813	5,667	8,123	13,790	20,813	5,672	6,187	11,859	20,813	5,673	5,237	10,910
White winegrapes												
Chardonnay	2,902	1,377	457	1,833	2,902	1,377	74	1,451	2,902	1,377	36	1,412
Pinot Gris	633	330	107	437	633	407	107	514	633	407	15	422
Riesling	81	31	0	31	81	31	0	31	81	31	0	31
Sauvignon Blanc	1,466	319	738	1,057	1,466	325	105	430	1,466	325	7	332
Semillon	230	217	184	401	230	217	184	401	230	217	20	238
Verdelho	104	0	61	61	104	0	61	61	104	0	61	61
Viognier	13	15	37	52	13	15	37	52	13	15	0	15
Total white winegrapes	6,462	2,289	1,584	3,873	6,462	2,372	568	2,940	6,462	2,372	140	2,512
All winegrapes	27,275	7,957	9,707	17,663	27,275	8,044	6,755	14,798	27,275	8,045	5,377	13,422

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

² A raising factor of 1.02 has been applied to committed intake to allow for non-respondents