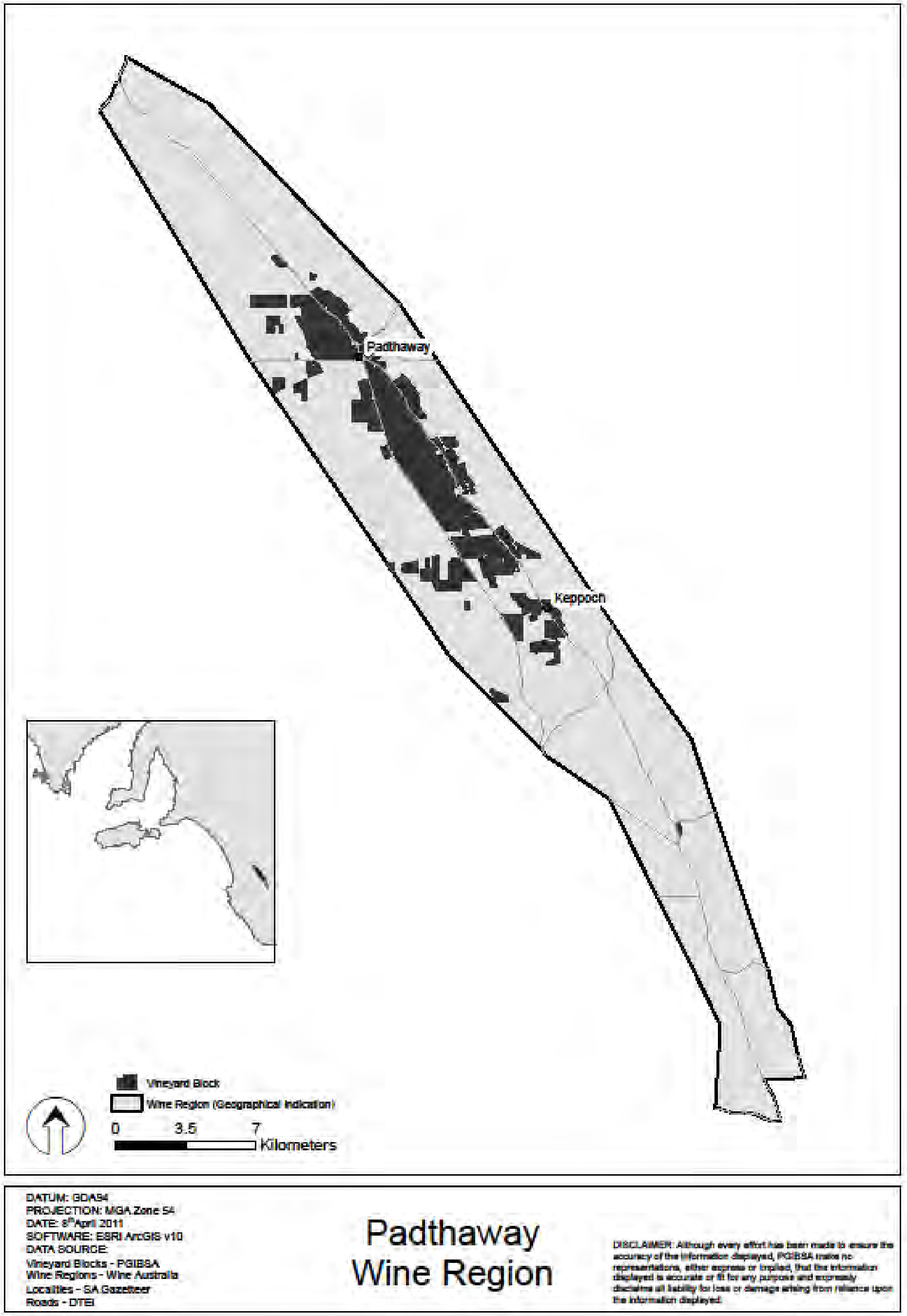

Padthaway wine region

Regional summary report

2011

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 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.

Vintage report

The 2010/11 growing season began with mild conditions through budburst, with August and September mean maximum temperature being noticeably lower than the LTA. October to January had temperatures that were the same as the long term average. Below LTA temperatures in February/ March lead to a long drawn out ripening period.

Rainfall for the months of December through to March was 321mm, which is over 200mm more than the LTA of 94.4mm for that same period.

Harvest commenced approximately 3 weeks later than last year (late Feb) and concluded (late April) 3 weeks later than last year. This was due to the slower rate of post verasion ripening due to the below average temperatures.

Both Powdery and Downy Mildew were evident across the region but good application timing by the growers with their preventative spray programs firstly and secondly where required eradicates saw no real issues with either disease at harvest. Red varieties struggled to ripen with most of the Shiraz blocks stalling at the 12-12.5 Baume level. Along with the increased levels of rain, this greatly increased the incidence of Botrytis. A number of blocks were rejected due to Botrytis.

There were some good parcels of Chardonnay and Sauvignon Blanc harvested which are showing early flavour development. Again Shiraz would be the regions' stand out variety; even with reduced tonnages some growers are confident of achieving some good quality results. Similar with Cabernet Sauvignon there are some parcels which are showing good potential.

Overall, it was a challenging vintage, the most difficult for the Padthaway grape growers in the regions' 47 year history. Currently, work is well underway with pruning and all growers are working positively towards a successful Vintage in 2012.

David Edwards
President, Padthaway Grape Growers Association

Overview of vintage statistics

The harvest from Padthaway was 26,586 tonnes in 2011, 29% below the 2010 harvest. The total value of grapes from the region decreased from $29.8 million in 2010 to $17.2 million. The average purchase values for Shiraz and Cabernet Sauvignon decreased significantly again by a further $224 and $181 per tonne respectively. Chardonnay also fell by $97 per tonne.

There were only 8 hectares of new plantings Padthaway in spring 2010 (including top-working and replacements), with the total area of planted vines in the region decreasing by 50 hectares to 4,050 hectares.

The estimated production from the Padthaway region for 2012 is 40,500 tonnes. The wineries' committed intake is 39,500 tonnes, leaving only 1,000 tonnes as yet uncontracted.

In 2016 the estimated production changes little at around 40,800 tonnes, of which 16,000 tonnes is already under contract or winery grown fruit. This leaves around 24,800 tonnes (60.8%) available on the open market.

Padthaway

Winegrape intake summary - vintage 2011

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	46	46	$30,039
Cabernet Sauvignon	3,455	$350	$2,500	$2,334,819	$676	1,697	5,152	$3,481,953
Malbec	229			$176,286	$770	0	229	$176,286
Merlot	192			$87,873	$457	1,021	1,213	$554,384
Meunier	0			$0	$0	6	6	$3,910
Pinot Noir	799	$400	$900	$510,700	$639	438	1,237	$790,737
Sangiovese	80			$21,470	$269	0	80	$21,470
Shiraz	1,903	$350	$1,200	$1,207,600	$634	2,089	3,993	$2,533,087
Total Red winegrapes	**6,659**			**$4,338,747**		**5,298**	**11,956**	**$7,591,866**
WHITE								
Chardonnay	3,790	$200	$1,420	$2,111,294	$557	4,178	7,968	$4,438,324
Muscat a Petit Grains Blanc	0			$0	$0	129	129	$89,683
Pinot Gris	2,732	$525	$1,000	$2,456,985	$899	614	3,346	$3,008,812
Riesling	0			$0	$0	882	882	$610,617
Sauvignon Blanc	749	$300	$1,500	$613,944	$820	351	1,100	$901,930
Semillon	125			$38,757	$311	35	159	$49,492
Traminer	173			$119,462	$692	322	495	$342,582
Verdelho	210			$47,142	$225	341	551	$123,914
Total White winegrapes	**7,778**			**$5,387,584**		**6,852**	**14,630**	**$9,565,355**
Total All winegrapes	**14,437**			**$9,726,332**		**12,150**	**26,586**	**$17,157,220**

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 Padthaway is 0.3%.

Padthaway

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2008*	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*
Red winegrapes						
Cabernet Franc	11	0	0	0	11	*0%*
Cabernet Sauvignon	842	10	3	0	855	*0%*
Grenache	0	0	2	0	2	*0%*
Malbec	18	0	0	0	18	*0%*
Merlot	169	0	0	0	169	*0%*
Meunier (Pinot Meunier)	1	0	0	0	1	*0%*
Petit Verdot	2	0	0	0	2	*0%*
Pinot Noir	90	7	15	8	120	*7%*
Sangiovese	4	0	0	0	4	*0%*
Shiraz	1,202	18	9	0	1,228	*0%*
Tempranillo	0	0	5	0	5	*0%*
Total red varieties	**2,340**	**35**	**33**	**8**	**2,415**	***0%***
White winegrapes						
Chardonnay	1,071	0	0	0	1,071	*0%*
Muscat A Petit Grains Blanc	12	0	0	0	12	*0%*
Other white	4	5	2	0	10	*0%*
Pinot Gris	152	0	0	0	152	*0%*
Riesling	189	0	0	0	189	*0%*
Sauvignon Blanc	89	6	0	0	95	*0%*
Semillon	40	0	0	0	40	*0%*
Traminer (Gewurztraminer)	25	0	0	0	25	*0%*
Verdelho	25	0	0	0	25	*0%*
Viognier	15	0	0	0	15	*0%*
Total white varieties	**1,622**	**11**	**2**	**0**	**1,635**	***0%***
Total all varieties	**3,962**	**46**	**35**	**8**	**4,050**	***0%***

Padthaway

Estimated supply and committed intake 2012 - 2016

Variety	2012 Est Supply [1]	2012 Committed intake[2] Winery grapes	2012 Committed intake[2] Contract purchases	2012 Committed intake[2] Total committed intake	2014 Est Supply [1]	2014 Committed intake[2] Winery grapes	2014 Committed intake[2] Contract purchases	2014 Committed intake[2] Total committed intake	2016 Est Supply [1]	2016 Committed intake[2] Winery grapes	2016 Committed intake[2] Contract purchases	2016 Committed intake[2] Total committed intake
Red winegrapes												
Cabernet Franc	135	80	0	80	135	0	0	0	135	0	0	0
Cabernet Sauvignon	6,805	3,989	4,023	8,012	6,833	2,194	2,252	4,446	6,833	1,482	931	2,413
Malbec	181	25	192	217	181	25	192	217	181	25	158	184
Merlot	2,026	1,153	425	1,578	2,026	366	199	565	2,026	345	0	345
Meunier	5	5	0	5	5	5	0	5	5	5	0	5
Pinot Noir	1,026	558	979	1,536	1,115	558	773	1,331	1,115	457	284	741
Sangiovese	41	0	60	60	41	0	60	60	41	0	60	60
Shiraz	10,969	5,672	3,646	9,318	11,032	4,247	1,840	6,088	11,032	2,920	1,104	4,025
Total red winegrapes	**21,239**	**11,482**	**9,324**	**20,807**	**21,430**	**7,395**	**5,316**	**12,711**	**21,430**	**5,235**	**2,537**	**7,773**
White winegrapes												
Chardonnay	12,852	6,689	4,693	11,382	12,852	3,770	2,631	6,401	12,852	2,334	1,475	3,809
Muscat a Petit Grains Blanc	124	124	0	124	124	124	0	124	124	0	0	0
Other White	83	3	0	3	100	0	0	0	100	0	0	0
Pinot Gris	2,127	390	1,991	2,381	2,127	390	1,916	2,306	2,127	215	1,916	2,130
Riesling	1,892	1,878	335	2,213	1,892	1,878	335	2,213	1,892	830	283	1,113
Sauvignon Blanc	1,116	533	794	1,327	1,138	442	668	1,110	1,138	252	565	817
Semillon	478	307	0	307	478	307	0	307	478	50	0	50
Traminer	249	291	170	461	249	291	0	291	249	157	0	157
Verdelho	246	318	0	318	246	318	0	318	246	131	0	131
Viognier	155	141	0	141	155	141	0	141	155	38	0	38
Total white winegrapes	**19,322**	**10,675**	**7,983**	**18,658**	**19,360**	**7,662**	**5,549**	**13,212**	**19,360**	**4,008**	**4,238**	**8,246**
All winegrapes	**40,561**	**22,157**	**17,308**	**39,465**	**40,790**	**15,058**	**10,865**	**25,923**	**40,790**	**9,243**	**6,776**	**16,019**

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

[2] *A raising factor of 1.0 has been applied to committed intake to allow for non-respondents*