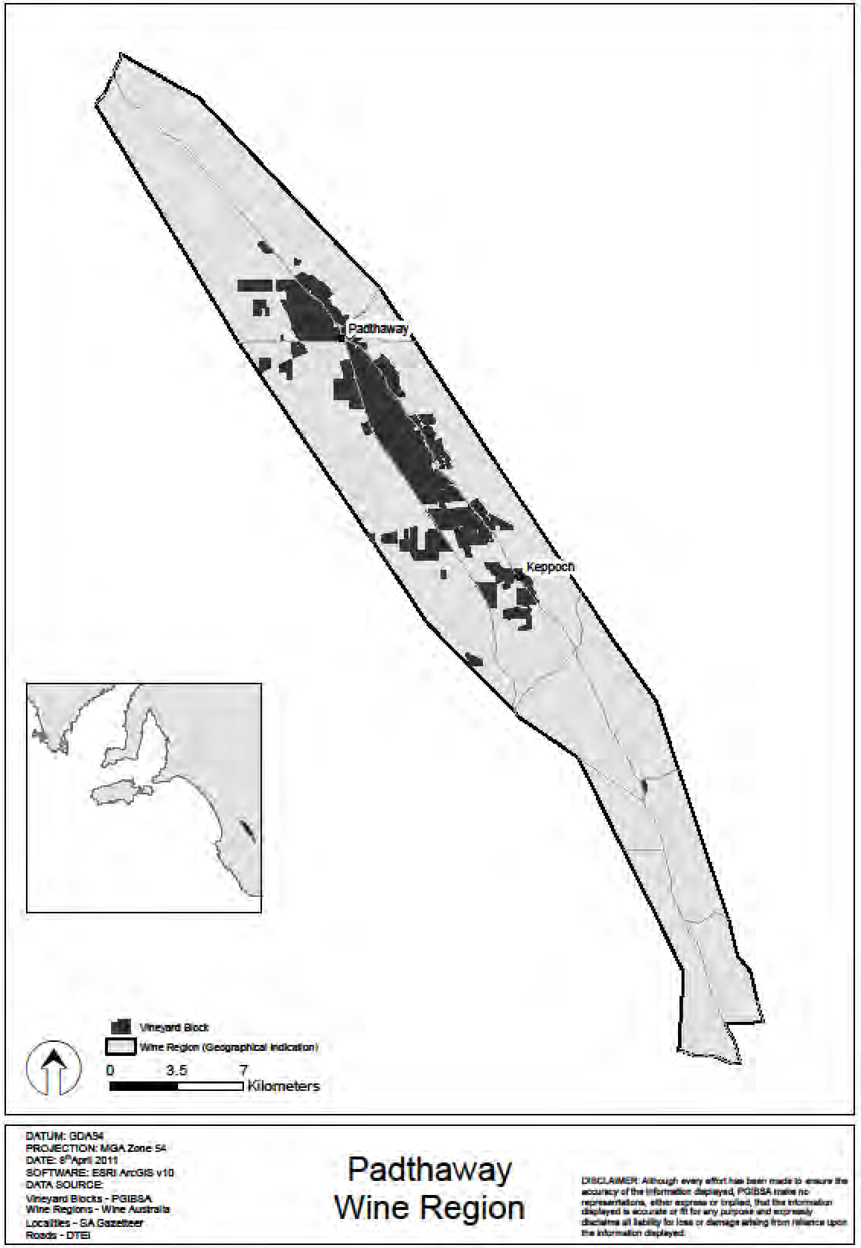

Padthaway wine region

Regional summary report

2012

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.

Padthaway

Vintage overview

Vintage report

The 2011 calendar year rainfall was significantly higher than the long term average. This resulted in lower irrigation requirements early in the season, as the soil profile had retained adequate moisture. The 2011/2012 financial year rainfall was also similar to the long term average in October, which then dropped away over the next 4 months (December onwards).

The growing season rainfall was much lower than vintage 2011, and well below the long term average. This aspect allowed soil moisture to be adjusted as necessary, and made for very good growing conditions.

The region vintage commenced 25th January with growers harvesting Pinot Noir for Sparkling base. This was 2 weeks earlier than long term average. The cooler March temperatures saw later varieties ripen slower and what looked like a condensed vintage didn't eventuate. The region finished in the last week of March.

Vintage 2012 was a relatively disease free season, with grower management of application timing and chemical selection all paid dividends. There was potential after the disease issues of vintage 2011 to have a high Botrytis inoculum load and disease pressure leading into vintage 2012, but with the aid of good weather conditions, the incidence was nil.

There were some isolated reports of Powdery Mildew, but in general terms, growers timing and spray programs along with ideal weather conditions saw this controlled in the majority of cases.

With ideal weather conditions, growers were able to manage canopies and irrigation to produce excellent standard blocks for harvest. Yields for whites were on long term average levels, but with delays in harvesting reds as winemakers were keen not to just harvesting on maturities reading, but also on flavours, saw the premium quality Cabernet Sauvignon and Shiraz varieties across the region down by approximately 15%, on long term average yields as quality standards were achieved for the regions Cabernet Sauvignon and Shiraz varieties.

David Edwards
President, Padthaway Grape Growers Association

Overview of vintage statistics

The harvest from Padthaway was 30,413 tonnes in 2012, 12.6% above the 2011 harvest. The total value of grapes from the region increased from $17.2 million in 2011 to $23.7 million. The average purchase values for all major varieties increased – of the red varieties, Shiraz up by $229 per tonne to $863 per tonne and Cabernet Sauvignon up by $227 per tonne to $903 per tonne. Of the white varieties, Chardonnay is up by $79 per tonne to $636 per tonne and Pinot Gris up by $104 per tonne to $993 per tonne.

There were only 4 hectares of new plantings Padthaway in spring 2011 (including top-working and replacements), with the total area of planted vines in the region increasing slightly from 4,050 hectares to 4,053 hectares.

The estimated production from the Padthaway region for 2013 is 40,300 tonnes. The wineries' committed intake is 36,800 tonnes, leaving 3,300 tonnes as yet uncontracted.

In 2017 the estimated production changes little at around 40,300 tonnes, of which 22,200 tonnes is already under contract or winery grown fruit. This leaves around 18,100 tonnes (44.9%) available on the open market.

Padthaway

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 Franc	4			$3,052	$700	44	48	$33,887
Cabernet Sauvignon	2,704	$600	$2,700	$2,440,756	$903	2,322	5,026	$4,537,000
Malbec	156			$137,268	$881	0	156	$137,268
Merlot	403	$400	$750	$252,194	$626	974	1,377	$861,861
Other Red	0			$0	$0	5	5	$4,242
Pinot Noir	803			$542,488	$676	399	1,202	$812,475
Sangiovese	10			$5,964	$600	0	10	$5,964
Shiraz	4,742	$300	$2,700	$4,091,069	$863	4,531	9,272	$7,999,836
Tempranillo	22			$29,700	$1,350	0	22	$29,700
Total Red winegrapes	**8,843**			**$7,502,491**		**8,275**	**17,119**	**$14,422,233**
WHITE								
Chardonnay	3,720	$300	$1,420	$2,366,459	$636	4,843	8,563	$5,447,397
Muscat Gordo Blanco	0			$0	$0	13	13	$9,923
Other White	20			$24,000	$1,200	1	21	$25,200
Pinot Gris	1,358			$1,348,477	$993	141	1,499	$1,488,763
Riesling	542			$350,248	$646	1,378	1,920	$1,240,824
Sauvignon Blanc	486	$500	$1,500	$431,006	$887	313	799	$708,321
Semillon	0			$0	$0	79	79	$58,533
Traminer	183			$130,682	$713	159	342	$244,301
Verdelho	0			$0	$0	57	57	$42,049
Total White winegrapes	**6,309**			**$4,650,872**		**6,985**	**13,294**	**$9,265,310**
Total All winegrapes	**15,152**			**$12,153,363**		**15,260**	**30,413**	**$23,687,544**

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 8.7%.

Padthaway

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2009*	*2009*	*2010*	*2011*	*Total area*	*% planted in 2011*
Red winegrapes						
Cabernet Franc	12	0	0	0	12	*0%*
Cabernet Sauvignon	861	3	0	4	868	*0%*
Malbec	18	0	0	0	18	*0%*
Merlot	186	0	0	0	186	*0%*
Other red	7	7	0	0	14	*0%*
Pinot Noir	97	15	8	0	120	*0%*
Shiraz	1,219	9	0	0	1,227	*0%*
Total red varieties	**2,400**	**33**	**8**	**4**	**2,444**	***0%***
White winegrapes						
Chardonnay	1,024	0	0	0	1,024	*0%*
Muscat A Petit Grains Blanc	12	0	0	0	12	*0%*
Other white	9	2	0	0	10	*0%*
Pinot Gris	152	0	0	0	152	*0%*
Riesling	193	0	0	0	193	*0%*
Sauvignon Blanc	95	0	0	0	95	*0%*
Semillon	40	0	0	0	40	*0%*
Traminer (Gewurztraminer)	30	0	0	0	30	*0%*
Verdelho	33	0	0	0	33	*0%*
Viognier	19	0	0	0	19	*0%*
Total white varieties	**1,607**	**2**	**0**	**0**	**1,609**	***0%***
Total all varieties	**4,007**	**35**	**8**	**4**	**4,053**	***0%***

Padthaway

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
Cabernet Franc	140	81	5	86	140	0	5	5	140	0	5	5
Cabernet Sauvignon	6,904	3,873	3,411	7,284	6,910	2,118	1,732	3,849	6,910	2,118	1,296	3,414
Malbec	181	25	193	218	181	846	160	1,006	181	846	160	1,006
Merlot	2,230	952	469	1,421	2,230	159	177	336	2,230	159	172	331
Other Red	0	5	0	5	0	5	0	5	0	5	0	5
Pinot Noir	1,115	557	864	1,421	1,212	557	286	843	1,212	557	286	843
Sangiovese	41	0	10	10	41	0	15	15	41	0	20	20
Shiraz	11,022	5,503	3,508	9,011	11,045	4,324	1,775	6,099	11,045	4,374	1,129	5,504
Tempranillo	27	0	0	0	38	0	0	0	38	0	0	0
Total red winegrapes	**21,700**	**10,995**	**8,461**	**19,456**	**21,843**	**8,009**	**4,150**	**12,159**	**21,843**	**8,059**	**3,068**	**11,128**
White winegrapes												
Chardonnay	12,286	6,699	4,189	10,888	12,286	3,871	1,516	5,387	12,286	3,812	1,280	5,092
Muscat Gordo Blanco	0	125	0	125	0	125	0	125	0	125	0	125
Other White	141	3	0	3	147	10	0	10	147	10	0	10
Pinot Gris	1,519	393	2,007	2,400	1,519	393	1,931	2,324	1,519	393	1,931	2,324
Riesling	1,931	1,893	338	2,231	1,931	1,893	338	2,231	1,931	1,893	338	2,231
Sauvignon Blanc	1,137	390	720	1,110	1,137	299	468	768	1,137	299	372	671
Semillon	478	120	0	120	478	120	0	120	478	120	0	120
Traminer	299	284	0	284	299	309	0	309	299	309	0	309
Verdelho	334	188	0	188	334	188	0	188	334	188	0	188
Total white winegrapes	**18,440**	**10,096**	**7,254**	**17,350**	**18,446**	**7,210**	**4,253**	**11,463**	**18,446**	**7,152**	**3,920**	**11,072**
All winegrapes	**40,140**	**21,092**	**15,714**	**36,806**	**40,290**	**15,219**	**8,403**	**23,622**	**40,290**	**15,211**	**6,989**	**22,200**

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

[2] *A raising factor of 1.011 has been applied to committed intake to allow for non-respondents*