

SA Winegrape Crush Survey Regional Summary Report - 2013

Padthaway Wine Region



Padthaway

Vintage overview

Vintage report

The regions 23 producers commenced vintage in Padthaway in the first week of February. Dry conditions allowed growers to manage vine health by irrigation with below half the long term average rainfall received since September 2012. The dryer weather conditions also allowed growers to benefit with no disease pressure.

For the regions 4,000ha of vineyards, the most important period in the regions viticulture season was the Christmas period and growers worked tirelessly during the Christmas break to ensure vines were irrigated to maintain healthy canopies leading into harvest. This showed in the early February period with healthy canopies allowing growers to ease the irrigation back and allow the vines to ripen the fruit with excellent flavours developing.

Yields were slightly down on long term average, this due in part to the weather and the focus on premium quality fruit production with winemakers. Vintage concluded in the region the first week of April.

The warm weather prior leading into the red harvest allowed for some excellent varietal characters to develop in Shiraz, and Cabernet Sauvignon in particular. Growers across the region reported improved quality/prices in blocks from vintage 2012 which was also a stand out vintage for the region. Chardonnay was the white variety the region will produce some typical premium wines from again.

In comparing vintage 2013 to other vintages, early reports are that vintage 2013 will be even better than the regions very successful vintage 2012.

David Edwards

President, Padthaway Grape Growers Association

Overview of vintage statistics

The harvest from Padthaway was 30,241 tonnes in 2013, down by 172 tonnes (0.6%) of the 2012 harvest of 30,413 tonnes. The total value of grapes from the region increased from \$23.7 million to \$25.3 million. The average purchase values for all major varieties increased. Of the red varieties – Shiraz up by \$131 per tonne to \$994 per tonne and Cabernet Sauvignon up by \$46 per tonne to \$949 per tonne. Of the white varieties – Chardonnay is up by \$38 per tonne to \$674 per tonne and Pinot Gris slightly up by \$3 per tonne to \$996 per tonne.

There were 70 hectares of new plantings Padthaway in spring 2012 (including top-working and replacements) compared with only 4 hectares in 2011. Of the new plantings, Malbec accounted for 91.4%. The total area of planted vines in the region decreased by 25 hectares to 4,028 hectares.

The estimated production from Padthaway for 2014 is 40,200 tonnes, with the wineries' committed intake being 30,000 tonnes. This leaves an estimated 10,200 tonnes (25.4%) of uncommitted fruit.

In 2018, the estimated production is 40,250 tonnes, of which 23,000 tonnes is already under contract or winery grown fruit. This leaves around 17,250 tonnes (42.9%) yet to be contracted or is available on the open market.

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	3			\$2,198	\$700	41	45	\$31,178
Cabernet Sauvignon	2,491	\$600	\$2,700	\$2,364,700	\$949	2,096	4,587	\$4,354,763
Malbec	91			\$81,750	\$903	0	91	\$81,750
Merlot	465	\$500	\$800	\$298,238	\$641	916	1,381	\$885,114
Pinot Noir	842	\$600	\$900	\$627,132	\$745	272	1,113	\$829,599
Sangiovese	13			\$7,536	\$600	0	13	\$7,536
Shiraz	3,624	\$600	\$2,700	\$3,600,686	\$994	3,831	7,455	\$7,407,616
Tempranillo	48			\$48,460	\$1,000	0	48	\$48,460
Total Red winegrapes	7,576			\$7,030,700		7,156	14,732	\$13,646,016
WHITE								
Chardonnay	5,077	\$400	\$1,420	\$3,423,381	\$674	5,094	10,171	\$6,858,049
Other white	17			\$17,300	\$1,000	4	21	\$21,300
Pinot Gris	1,671			\$1,664,720	\$996	327	1,998	\$1,990,487
Riesling	233			\$207,110	\$888	1,418	1,652	\$1,466,400
Sauvignon Blanc	844	\$500	\$1,153	\$706,069	\$836	315	1,160	\$969,654
Semillon	0			\$0	\$0	56	56	\$43,275
Traminer	152			\$98,488	\$650	104	255	\$165,776
Verdelho	0			\$0	\$0	132	132	\$101,607
Viognier	64			\$63,880	\$1,000	0	64	\$63,880
Total White winegrapes	8,058			\$6,180,947		7,451	15,509	\$11,680,428
Grand Total All winegrapes	15,635			\$13,211,647		14,607	30,241	\$25,326,444

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 14.3%.

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2012
	Pre-2010	2010	2011	2012		
Red winegrapes						
Cabernet Franc	12	0	0	0	12	0%
Cabernet Sauvignon	860	0	4	4	868	0%
Malbec	18	0	0	64	83	78%
Merlot	186	0	2	0	188	0%
Other Red	9	0	0	0	9	0%
Pinot Noir	112	8	0	0	120	0%
Shiraz	1,213	0	0	0	1,213	0%
Total red varieties	2,411	8	6	68	2,493	3%
White winegrapes						
Chardonnay	1,002	0	0	0	1,002	0%
Other White	10	0	0	0	10	0%
Pinot Gris	152	0	0	0	152	0%
Riesling	189	0	0	2	191	1%
Sauvignon Blanc	84	0	0	0	84	0%
Semillon	21	0	0	0	21	0%
Traminer (Gewurztraminer)	34	0	0	0	34	0%
Verdelho	22	0	0	0	22	0%
Viognier	19	0	0	0	19	0%
Total white varieties	1,533	0	0	2	1,535	0%
Total all varieties	3,944	8	6	70	4,028	2%

Variety	2014				2016				2018			
	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	140	0	5	5	140	0	5	5	140	0	5	5
Cabernet Sauvignon	6,897	1,805	3,139	4,944	6,920	1,896	2,925	4,821	6,920	1,712	2,168	3,880
Malbec	181	25	197	222	181	174	197	371	181	149	37	186
Merlot	2,242	438	598	1,036	2,259	438	396	834	2,259	365	275	640
Pinot Noir	1,175	418	1,155	1,574	1,197	418	1,264	1,683	1,197	351	971	1,322
Sangiovese	41	0	10	10	41	0	15	15	41	0	20	20
Shiraz	10,920	3,888	3,744	7,633	10,920	4,104	3,693	7,796	10,920	3,585	3,246	6,831
Tempranillo	38	0	0	0	38	0	0	0	38	0	0	0
Total red winegrapes	21,836	6,575	8,849	15,424	21,898	7,030	8,496	15,525	21,898	6,161	6,723	12,884
White winegrapes												
Chardonnay	12,028	3,137	5,196	8,333	12,028	3,488	5,178	8,666	12,028	3,033	4,724	7,757
Other white	302	3	0	3	302	10	0	10	302	10	0	10
Pinot Gris	2,124	373	1,930	2,303	2,124	373	1,930	2,303	2,124	373	0	373
Riesling	1,891	1,883	388	2,271	1,891	1,883	388	2,271	1,891	1,056	51	1,107
Sauvignon Blanc	1,008	288	702	991	1,008	318	652	970	1,008	216	184	400
Semillon	253	94	0	94	253	122	0	122	253	98	0	98
Traminer	339	144	191	335	339	144	191	335	339	0	191	191
Verdelho	216	188	0	188	216	188	0	188	216	188	0	188
Viognier	192	0	104	104	192	0	104	104	192	0	0	0
Total white winegrapes	18,353	6,110	8,512	14,622	18,353	6,526	8,444	14,970	18,353	4,975	5,150	10,124
All winegrapes	40,189	12,685	17,362	30,047	40,251	13,556	16,939	30,495	40,251	11,136	11,873	23,009

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