The 2004/05 season for Padthaway was one of contrasting conditions. It was only slightly warmer than normal, with the heat summation being about five percent above the average of the last 20 years. There were two short periods when the maximum temperatures exceeded 40°C and yet on 3rd February the maximum temperature was only 15°C.

The winter rainfall recordings were about 10% above average and very good rainfall was recorded in August to start the season.

September was very mild whilst October was considerably warmer than average. A very good budburst occurred slightly earlier than the last few seasons. The spring was virtually frost-free with no crop losses being reported. These temperat conditions during spring resulted in a relatively short flowering period and were very favourable for fruit set.

Good rains were recorded in November and temperatures were relatively warm, encouraging good vine growth.

December and January were generally mild to warm, and February was significantly cooler than normal. At the start of February, while some varieties were completing veraison, there was a period of very cool weather that seems to have impacted on the final fruit flavour and tannin development at maturity.

This was a season of very low disease pressure with virtually no symptoms of mildew.

Vintage commenced in mid-February. Conditions remained relatively warm to mild and dry - ideal for the ripening crop. The quality of both white and red varieties was very good to excellent with Chardonnay and Shiraz being the highlights.

Graham Kaye
President, Padthaway Grape Growers Association

### Overview of vintage statistics

Padthaway produced 33,659 tonnes in 2005 – a 34% drop after the record 2004 harvest. 52% of the region’s production was in red varieties, compared with 64% across the state. The average purchase value for Chardonnay and Riesling dropped by around $100 per tonne, while the price of Cabernet Sauvignon increased by $60 per tonne. Because of the greatly reduced yield, the total value of grapes to the region decreased by 37% from just under $55 million in 2004 to $35 million.

The forecast is for estimated intake to remain at around 37,000 tonnes for the next five years, while preferred intake increases from 33,000 tonnes in 2006 to 36,500 tonnes in 2010. Chardonnay accounts for 33% of the preferred intake, with Cabernet Sauvignon next at 14%.

There were 106 hectares of new plantings in 2004 – about 3% of the total area. There were roughly equal areas of Shiraz, Chardonnay and Pinot Gris planted. In the case of Pinot Gris, all 38 hectares were planted in the last two years.

Based on the current vineyard area in the region, and using estimated yield figures of 9t/ha for reds and 10t/ha for whites, the estimated production for Padthaway in 2008 is around 35,000 tonnes. This is slightly less than the preferred intake for that year, giving an estimated 3% shortfall. Most of the estimated shortfall is in Chardonnay (2200t) and Merlot (1300t), while there is an expected surplus of Cabernet Sauvignon (2000t).
## PADTHAWAY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

*Table 12.1*

<table>
<thead>
<tr>
<th>Variety</th>
<th>Pre-2000</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>Total area</th>
<th>% planted in 2004</th>
</tr>
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<tr>
<td><strong>RED WINEGRAPE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>CABERNET FRANC</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>12</td>
<td>0%</td>
</tr>
<tr>
<td>CABERNET SAUVIGNON</td>
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<td>72</td>
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<td>0</td>
<td>0</td>
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<td>MALBEC</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>5</td>
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</tr>
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<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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</tr>
<tr>
<td>SHIRAZ</td>
<td>760</td>
<td>75</td>
<td>104</td>
<td>66</td>
<td>11</td>
<td>28</td>
<td>1043</td>
<td>3%</td>
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<td>0</td>
<td>0</td>
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<td>154</td>
<td>125</td>
<td>66</td>
<td>11</td>
<td>28</td>
<td>2166</td>
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<td>CHARDONNAY</td>
<td>725</td>
<td>18</td>
<td>67</td>
<td>79</td>
<td>69</td>
<td>32</td>
<td>991</td>
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<td>MUSCAT BLANC</td>
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<td>0</td>
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<td>0</td>
<td>12</td>
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<td>0</td>
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<td>0</td>
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<td>15</td>
<td>79</td>
<td>19%</td>
</tr>
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<td>SEMILLON</td>
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<td>0</td>
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<td>0</td>
<td>46</td>
<td>0%</td>
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<tr>
<td>TRAMINER</td>
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<td>0</td>
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<td>0%</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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<td>0%</td>
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<tr>
<td>VIOGNIER</td>
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<td>0</td>
<td>6</td>
<td>0</td>
<td>19</td>
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<td><strong>TOTAL WHITE WINEGRAPE</strong></td>
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<td>89</td>
<td>79</td>
<td>104</td>
<td>79</td>
<td>1560</td>
<td>5%</td>
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<td><strong>TOTAL ALL VARIETIES</strong></td>
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<td>215</td>
<td>145</td>
<td>115</td>
<td>106</td>
<td>3726</td>
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## Table 12.2

<table>
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<tr>
<th>Variety</th>
<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt;0) for</th>
<th>Own</th>
<th>Other</th>
<th>Preferred</th>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cabernet Franc</td>
<td>100</td>
<td>0</td>
<td>100</td>
<td>59</td>
<td>0%</td>
<td>169%</td>
<td>2</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Cabernet Sauvignon</td>
<td>2,434</td>
<td>2,650</td>
<td>5,084</td>
<td>4,278</td>
<td>52%</td>
<td>119%</td>
<td>6</td>
<td>13</td>
<td>13</td>
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<tr>
<td>Malbec</td>
<td>59</td>
<td>45</td>
<td>104</td>
<td>20</td>
<td>43%</td>
<td>521%</td>
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<tr>
<td>Merlot</td>
<td>1,525</td>
<td>433</td>
<td>1,958</td>
<td>1,451</td>
<td>22%</td>
<td>135%</td>
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<td>8</td>
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<tr>
<td>Meunier (Pinot Meunier)</td>
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<td>0</td>
<td>4</td>
<td>4</td>
<td>0%</td>
<td>100%</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Petit Verdot</td>
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<td>58</td>
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<td>0%</td>
<td>196%</td>
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<td>0</td>
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<tr>
<td>Pinot Noir</td>
<td>1,166</td>
<td>126</td>
<td>1,292</td>
<td>887</td>
<td>10%</td>
<td>146%</td>
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<td>4</td>
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<td>39</td>
<td>40</td>
<td>100%</td>
<td>97%</td>
<td>0</td>
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<td>1</td>
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<tr>
<td>Shiraz</td>
<td>4,160</td>
<td>4,630</td>
<td>8,791</td>
<td>7,939</td>
<td>53%</td>
<td>111%</td>
<td>6</td>
<td>15</td>
<td>17</td>
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<tr>
<td><strong>Total RED</strong></td>
<td>9,506</td>
<td>7,923</td>
<td>17,430</td>
<td>14,709</td>
<td>45%</td>
<td>118%</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>% of grand total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>52%</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td><strong>WHITE WINEGRAPE</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arneis</td>
<td>3</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td>0%</td>
<td>100%</td>
<td>1</td>
<td>0</td>
<td>1</td>
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<tr>
<td>Chardonnay</td>
<td>7,362</td>
<td>3,584</td>
<td>10,946</td>
<td>10,661</td>
<td>33%</td>
<td>103%</td>
<td>7</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>Muscat Blanc</td>
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<td>105</td>
<td>105</td>
<td>0%</td>
<td>100%</td>
<td>1</td>
<td>0</td>
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</tr>
<tr>
<td>Riesling</td>
<td>3,213</td>
<td>165</td>
<td>3,378</td>
<td>3,297</td>
<td>5%</td>
<td>102%</td>
<td>3</td>
<td>1</td>
<td>2</td>
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<tr>
<td>Sauvignon Blanc</td>
<td>394</td>
<td>171</td>
<td>565</td>
<td>529</td>
<td>30%</td>
<td>107%</td>
<td>4</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Semillon</td>
<td>468</td>
<td>183</td>
<td>651</td>
<td>619</td>
<td>28%</td>
<td>105%</td>
<td>2</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Traminer</td>
<td>239</td>
<td>0</td>
<td>239</td>
<td>358</td>
<td>0%</td>
<td>67%</td>
<td>2</td>
<td>0</td>
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</tr>
<tr>
<td>Verdelho</td>
<td>217</td>
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<td>260</td>
<td>264</td>
<td>17%</td>
<td>99%</td>
<td>2</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Viognier</td>
<td>28</td>
<td>55</td>
<td>83</td>
<td>220</td>
<td>66%</td>
<td>38%</td>
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<td>2</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total WHITE</strong></td>
<td>12,029</td>
<td>4,200</td>
<td>16,230</td>
<td>16,054</td>
<td>26%</td>
<td>101%</td>
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<td></td>
</tr>
<tr>
<td>% of grand total</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>48%</td>
<td>52%</td>
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<tr>
<td><strong>Grand Total</strong></td>
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<td>33,659</td>
<td>30,764</td>
<td>36%</td>
<td>109%</td>
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### Table 12.3

<table>
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<tr>
<th>Variety</th>
<th>Grower grown (t)</th>
<th>Total crushed (t)</th>
<th>Estimated total value purchased grapes</th>
<th>Estimated total value total grapes</th>
<th>Lowest price(^1)</th>
<th>Highest price</th>
<th>Calc average purchase value per tonne</th>
<th>qualifier(^2)</th>
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<td></td>
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<td></td>
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<tr>
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<td>104</td>
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<td>$300 100%</td>
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<td>8,791</td>
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<td>$9,069,509</td>
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<td>$1,813</td>
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<td>$250</td>
<td>$1,813</td>
<td>$1,032 99%</td>
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<td></td>
</tr>
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</tr>
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<td>$3,377,660</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$1,000 100%</td>
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</tr>
<tr>
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<td>565</td>
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<td>651</td>
<td>$164,655</td>
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<td>$901 100%</td>
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<td>$269,364</td>
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<td>$0</td>
<td>$0</td>
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</tr>
<tr>
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<td>260</td>
<td>$38,730</td>
<td>$233,519</td>
<td>$897</td>
<td>$897</td>
<td>$897 100%</td>
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</tr>
<tr>
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<td>83</td>
<td>$79,449</td>
<td>$119,644</td>
<td>$1,446</td>
<td>$1,446</td>
<td>$1,446 100%</td>
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<tr>
<td><strong>Total WHITE</strong></td>
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<td>16,230</td>
<td>$4,732,333</td>
<td>$17,843,809</td>
<td>$250</td>
<td>$1,813</td>
<td>$1,032 99%</td>
<td></td>
</tr>
<tr>
<td><strong>Total all varieties</strong></td>
<td>12,123</td>
<td>33,659</td>
<td>$12,661,274</td>
<td>$35,043,883</td>
<td>$250</td>
<td>$1,813</td>
<td>$1,032 99%</td>
<td></td>
</tr>
</tbody>
</table>

\(^1\) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

\(^2\) This indicates the percentage of purchased fruit for which pricing information was supplied.
Table 12.4

<table>
<thead>
<tr>
<th>Variety</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>RED</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cabernet Franc</td>
<td>127</td>
<td>64</td>
<td>100%</td>
<td>127</td>
<td>64</td>
</tr>
<tr>
<td>Cabernet Sauvignon</td>
<td>7,525</td>
<td>5,839</td>
<td>99%</td>
<td>7,357</td>
<td>5,826</td>
</tr>
<tr>
<td>Malbec</td>
<td>47</td>
<td>0</td>
<td>57%</td>
<td>47</td>
<td>0</td>
</tr>
<tr>
<td>Merlot</td>
<td>1,653</td>
<td>1,330</td>
<td>99%</td>
<td>2,153</td>
<td>1,892</td>
</tr>
<tr>
<td>Petit Verdot</td>
<td>31</td>
<td>0</td>
<td>49%</td>
<td>31</td>
<td>0</td>
</tr>
<tr>
<td>Pinot Noir</td>
<td>1,325</td>
<td>900</td>
<td>98%</td>
<td>2,146</td>
<td>850</td>
</tr>
<tr>
<td>Sangiovese</td>
<td>49</td>
<td>0</td>
<td>100%</td>
<td>49</td>
<td>0</td>
</tr>
<tr>
<td>Shiraz</td>
<td>10,253</td>
<td>9,377</td>
<td>98%</td>
<td>10,417</td>
<td>9,869</td>
</tr>
<tr>
<td><strong>Total RED</strong></td>
<td>21,010</td>
<td>17,560</td>
<td>21,427</td>
<td>18,551</td>
<td>20,570</td>
</tr>
<tr>
<td><strong>WHITE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arneis</td>
<td>1</td>
<td>1</td>
<td>100%</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Chardonnay</td>
<td>10,826</td>
<td>10,274</td>
<td>100%</td>
<td>11,504</td>
<td>10,836</td>
</tr>
<tr>
<td>Pinot Gris</td>
<td>0</td>
<td>0</td>
<td>0%</td>
<td>77</td>
<td>77</td>
</tr>
<tr>
<td>Riesling</td>
<td>2,896</td>
<td>3,034</td>
<td>100%</td>
<td>2,896</td>
<td>3,034</td>
</tr>
<tr>
<td>Sauvignon Blanc</td>
<td>690</td>
<td>683</td>
<td>100%</td>
<td>748</td>
<td>710</td>
</tr>
<tr>
<td>Semillon</td>
<td>537</td>
<td>536</td>
<td>76%</td>
<td>537</td>
<td>536</td>
</tr>
<tr>
<td>Traminer</td>
<td>382</td>
<td>415</td>
<td>100%</td>
<td>442</td>
<td>435</td>
</tr>
<tr>
<td>Verdelho</td>
<td>373</td>
<td>367</td>
<td>100%</td>
<td>373</td>
<td>367</td>
</tr>
<tr>
<td>Viognier</td>
<td>140</td>
<td>220</td>
<td>88%</td>
<td>145</td>
<td>270</td>
</tr>
<tr>
<td><strong>Total WHITE</strong></td>
<td>15,845</td>
<td>15,530</td>
<td>16,722</td>
<td>16,266</td>
<td>17,282</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>36,855</td>
<td>33,090</td>
<td>38,149</td>
<td>34,817</td>
<td>37,852</td>
</tr>
</tbody>
</table>

1 This indicates the percentage of crushed fruit in the current vintage for which forecast intake data was supplied.
### PADTHAWAY SUPPLY VS DEMAND FORECASTS 2006 AND 2008

#### Table 12.5

<table>
<thead>
<tr>
<th>Variety</th>
<th>2006</th>
<th></th>
<th>2008</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>area (ha)</td>
<td>production (tonnes)</td>
<td>intake (tonnes)</td>
<td>difference</td>
</tr>
<tr>
<td>Cabernet Franc</td>
<td>12</td>
<td>108</td>
<td>64</td>
<td>44</td>
</tr>
<tr>
<td>Cabernet Sauvignon</td>
<td>806</td>
<td>7254</td>
<td>5,839</td>
<td>1,415</td>
</tr>
<tr>
<td>Malbec</td>
<td>22</td>
<td>198</td>
<td>0</td>
<td>198</td>
</tr>
<tr>
<td>Merlot</td>
<td>176</td>
<td>1584</td>
<td>1,330</td>
<td>254</td>
</tr>
<tr>
<td>Petit Verdot</td>
<td>5</td>
<td>45</td>
<td>0</td>
<td>45</td>
</tr>
<tr>
<td>Pinot Noir</td>
<td>98</td>
<td>882</td>
<td>900</td>
<td>-18</td>
</tr>
<tr>
<td>Sangiovese</td>
<td>4</td>
<td>36</td>
<td>50</td>
<td>-14</td>
</tr>
<tr>
<td>Shiraz</td>
<td>1,004</td>
<td>9036</td>
<td>9,377</td>
<td>-341</td>
</tr>
<tr>
<td><strong>Red Total</strong></td>
<td>2,127</td>
<td>19143</td>
<td>17,560</td>
<td>1,583</td>
</tr>
<tr>
<td>Arneis</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>-1</td>
</tr>
<tr>
<td>Chardonnay</td>
<td>890</td>
<td>8900</td>
<td>10,274</td>
<td>-1,374</td>
</tr>
<tr>
<td>Pinot Gris</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Riesling</td>
<td>302</td>
<td>3020</td>
<td>3,034</td>
<td>-14</td>
</tr>
<tr>
<td>Sauvignon Blanc</td>
<td>51</td>
<td>510</td>
<td>683</td>
<td>-173</td>
</tr>
<tr>
<td>Semillon</td>
<td>46</td>
<td>460</td>
<td>536</td>
<td>-76</td>
</tr>
<tr>
<td>Traminer</td>
<td>30</td>
<td>300</td>
<td>415</td>
<td>-115</td>
</tr>
<tr>
<td>Verdelho</td>
<td>34</td>
<td>340</td>
<td>367</td>
<td>-27</td>
</tr>
<tr>
<td>Viognier</td>
<td>13</td>
<td>130</td>
<td>220</td>
<td>-90</td>
</tr>
<tr>
<td><strong>White Total</strong></td>
<td>1,366</td>
<td>13660</td>
<td>15,530</td>
<td>-1,870</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>3,493</td>
<td>32803</td>
<td>33,090</td>
<td>-287</td>
</tr>
</tbody>
</table>

1. Planting data derived from PGIB vineyard register. Bearing area includes plantings more than three years old.
2. Bearing area multiplied by yield estimate of 9t/ha for reds and 10t/ha for whites.
3. Taken from the Utilisation and Pricing survey (see previous page).
Figure 12.1

Past production and projections (major varieties)

- Cabernet Sauvignon
- Merlot
- Shiraz
- Riesling
- Chardonnay

Past production and projections (preferred intake)