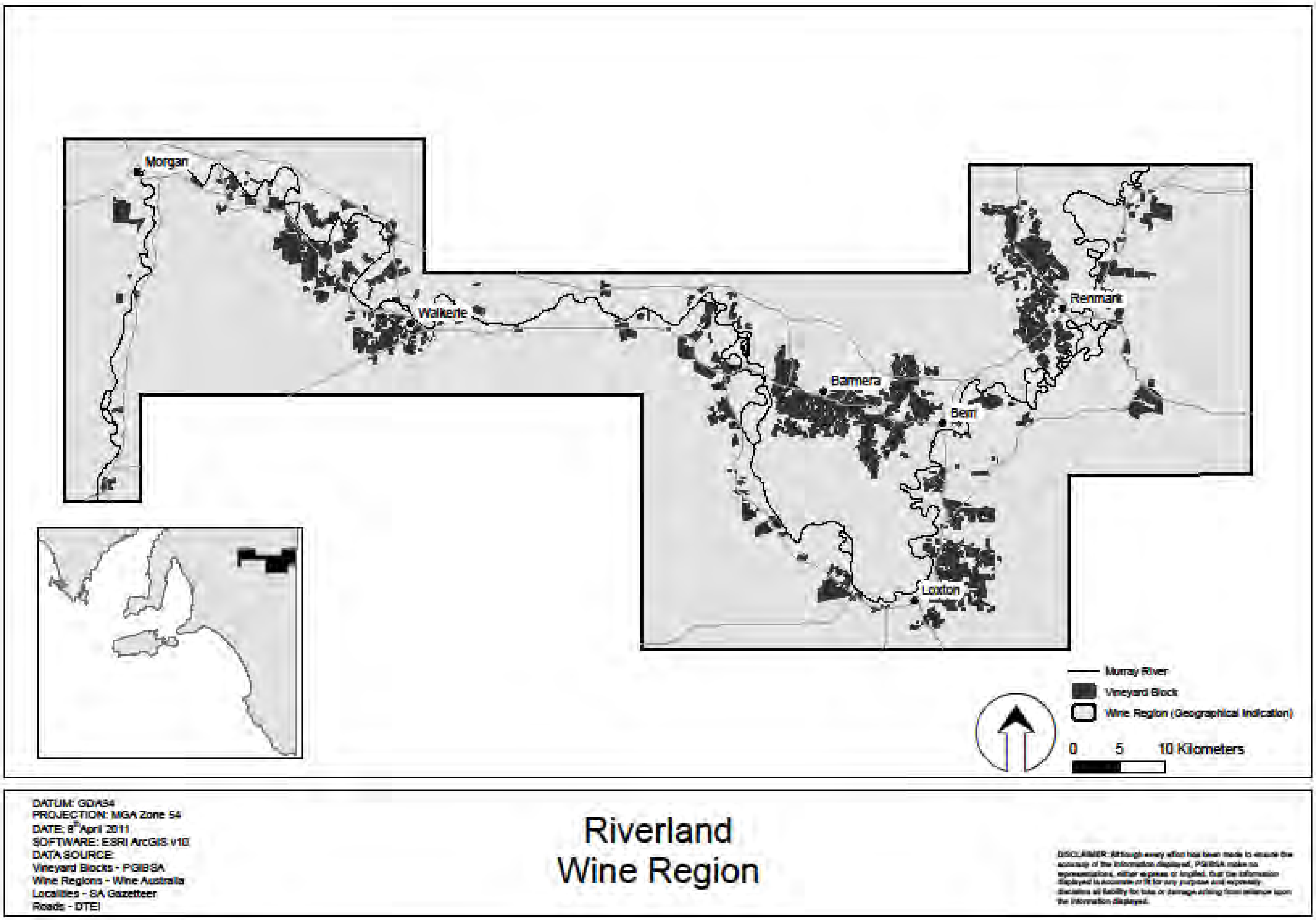
Riverland wine region

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 overview

Vintage report

It was unseasonably wet and mild right from the start with a rainfall event just after budburst which appears to have caused a Downy Mildew primary infection when the best information said there was no risk.

The rainfall events that followed gave downy mildew ideal conditions for several secondary infections before most people noticed it. There was more rain around flowering which gave botrytis and other rotting agents a good start.

Conditions continued mild and wet which lead to canopies growing rapidly and ideal conditions for the spread of Powdery Mildew.

The mild conditions meant most varieties set very well with yields promising. Anecdotally there were lots of Gordo that did not do so well, perhaps as a result of lower than normal soil temperature.

The rain events continued into the ripening and harvest period. This meant that harvest dates were pushed back from the last few years to a more normal timing. The fruit was showing signs of the battle that had been waged on Downy and Powdery Mildew as well as Botrytis and other rots.

Fruit was developing good flavour profiles at lower than usual baumes. Some processors made the most of this and brought fruit in early knowing that it would not last with more bad weather. This fruit was of a good quality. Those that held off for higher baumes ended up missing out on large amounts of fruit that was not fit for processing. The worst affected varieties were Shiraz and Colombard and to a lesser extent Chardonnay and Cabernet Sauvignon.

Overall harvested tonnages appear to be slightly up on last year despite all the losses to disease.

The year was one to forget in the Riverland as it was for other areas and could almost be described as the perfect storm - not much more could have gone wrong. In an average year, the Riverland has one day in nine affected by rain and even then, it is usually not much. This year it was one day in four, often with large gauging.

Ashley Chabrel
Phylloxera and Grape Industry Board and

Overview of vintage statistics

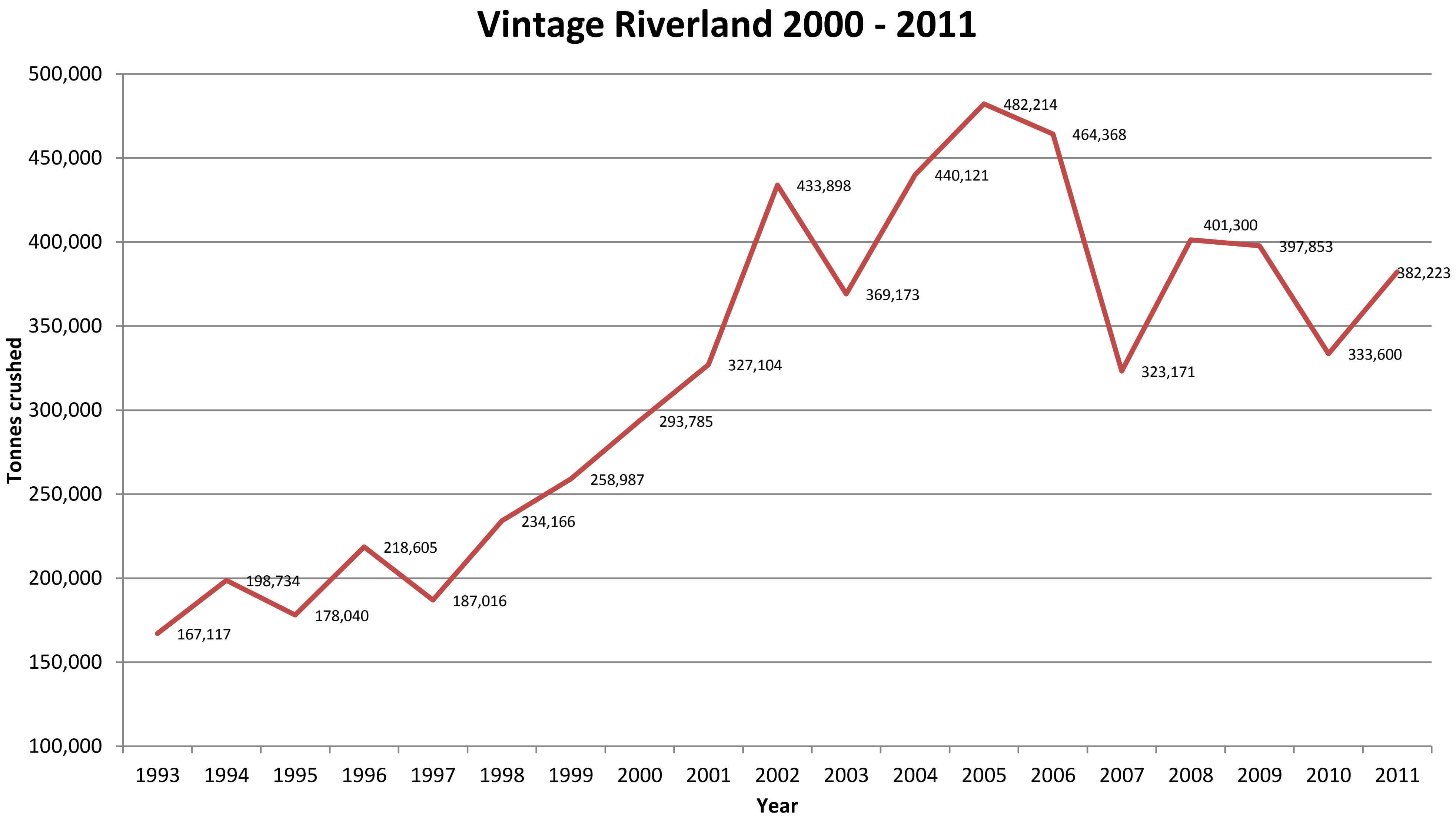
The harvest from the Riverland was 382,223 tonnes in 2011, up by 14.6% on the 2010 harvest. The total value of purchased grapes increased by $15.5 million to $105.2 million. The average purchase values for all varieties slightly varied, with Shiraz continuing to fall to an all-time low of $302 per tonne. Both Cabernet Sauvignon and Chardonnay increased in value to $314 and $233 per tonne respectively.

There were 75 hectares of new plantings in the Riverland in spring 2010 (including top-working and replacements) compared with 126 hectares in the previous year. Most of the new plantings were in Pinot Gris 18 hectares (24%), Muscat Gordo Blanco 14 hectares (19%) and Shiraz 10 hectares (13%). The total area planted to vines in the Riverland decreased by 310 hectares compared with 1,000 hectares in the previous year.

The estimated production from the Riverland for 2012 is 426,900 tonnes. The wineries' committed intake is around 413,400 tonnes, leaving around 13,500 tonnes (3%) uncontracted.

By 2016, assuming an improvement in water allocations and growing conditions but taking into account the small decline in planted area, the estimated production is 429,000 tonnes, of which 83% (357,000 tonnes) is already under contract or winery grown fruit. This leaves 72,000 tonnes as yet uncommitted.

Riverland



Vintage Riverland 2000 - 2011
Tonnes crushed
500,000
450,000
400,000
350,000
300,000
250,000
200,000
150,000
100,000
167,117
198,734
178,040
218,605
187,016
234,166
258,987
293,785
327,104
433,898
369,173
440,121
482,214
464,368
323,171
401,300
397,853
333,600
382,223
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
Year

Riverland

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								
Barbera	23			$4,548	$197	0	23	$4,548
Cabernet Franc	3			$570	$190	23	26	$4,853
Cabernet Sauvignon	40,573	$200	$510	$12,720,552	$314	10,693	51,266	$16,072,972
Carignan	0			$0	$0	47	47	$14,235
Grenache	4,391	$100	$600	$1,015,405	$231	801	5,192	$1,200,594
Malbec	81			$15,325	$190	117	197	$37,495
Mataro	2,420	$165	$500	$636,085	$263	0	2,420	$636,085
Merlot	16,023	$204	$510	$4,882,139	$305	4,284	20,307	$6,187,471
Muscat a Petit Grains Rouge / Rose	0			$70	$350	0	1	$210
Other Red	616	$190	$800	$240,137	$390	160	775	$302,386
Petit Verdot	6,287	$100	$608	$1,517,402	$241	3,114	9,401	$2,269,110
Pinot Noir	6,177	$250	$400	$2,123,174	$344	883	7,060	$2,426,819
Ruby Cabernet	848	$175	$350	$206,000	$243	1,177	2,025	$491,962
Sangiovese	147			$26,370	$180	392	539	$96,934
Shiraz	66,543	$100	$800	$20,171,452	$303	17,014	83,557	$25,328,969
Tarrango	152			$30,336	$200	0	152	$30,336
Tempranillo	438	$300	$600	$170,809	$390	3	441	$171,979
Touriga	35			$8,091	$230	56	91	$21,038
Total Red winegrapes	**144,755**			**$43,768,465**		**38,764**	**183,519**	**$55,297,996**

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 Riverland is 0.6%.

Riverland

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
WHITE								
Canada Muscat	148			$71,496	$484	0	148	$71,496
Chardonnay	104,097	$150	$600	$24,283,655	$233	11,267	115,364	$26,912,121
Chenin Blanc	2,010	$150	$320	$408,781	$203	130	2,140	$435,292
Colombard	18,838	$140	$320	$3,856,238	$205	3,047	21,885	$4,479,998
Crouchen	45			$10,647	$237	113	158	$37,457
Doradillo	128			$18,835	$148	327	455	$67,115
Marsanne	28			$5,233	$190	0	28	$5,233
Muscadelle	14			$2,646	$194	113	127	$24,571
Muscat a Petit Grains Blanc	3,061	$250	$500	$1,078,433	$352	325	3,386	$1,192,964
Muscat Gordo Blanco	17,361	$100	$500	$5,842,983	$337	2,242	19,603	$6,597,438
Other White	792	$180	$1,000	$365,514	$462	557	1,349	$622,677
Palomino	0			$0	$0	0	0	$100
Pedro Ximenes	5			$863	$190	0	5	$863
Pinot Gris	580	$250	$600	$266,941	$460	371	951	$437,499
Riesling	2,212	$200	$320	$584,500	$264	817	3,028	$800,377
Sauvignon Blanc	9,878	$230	$470	$3,067,231	$311	3,339	13,217	$4,104,097
Semillon	5,103	$175	$446	$1,174,162	$230	4,623	9,726	$2,237,794
Sultana	172			$32,612	$190	0	172	$32,612
Taminga	96			$19,124	$200	0	96	$19,124
Traminer	2,632			$714,338	$271	380	3,012	$817,516
Trebbiano	69			$13,026	$190	0	69	$13,026
Verdelho	1,933	$195	$250	$421,878	$218	50	1,983	$432,810
Viognier	1,405	$180	$800	$456,403	$325	398	1,803	$585,816
Total White winegrapes	**170,603**			**$42,695,536**		**28,100**	**198,704**	**$49,927,995**
Total All winegrapes	**315,359**			**$86,464,001**		**66,864**	**382,223**	**$105,225,991**

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 Riverland is 0.6%.

Riverland

Historical Weighted Average Price vs tonnes crushed

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2008*	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*
White winegrapes						
Biancone (White Grenache)	9	0	0	0	9	*0%*
Chardonnay	4,680	8	0	1	4,690	*0%*
Chenin Blanc	101	0	0	0	101	*0%*
Colombard	843	1	0	2	845	*0%*
Doradillo	85	0	0	0	85	*0%*
Muscadelle (Tokay)	13	0	0	0	13	*0%*
Muscat A Petit Grains Blanc	116	12	7	3	138	*2%*
Muscat Gordo Blanco	1,060	26	11	14	1,111	*1%*
Other white	54	1	2	1	58	*2%*
Palomino	14	0	0	0	14	*0%*
Pinot Gris	47	5	4	18	73	*25%*
Riesling	214	0	0	0	214	*0%*
Sauvignon Blanc	417	70	2	1	490	*0%*
Semillon	374	1	0	0	375	*0%*
Sultana	201	0	0	0	202	*0%*
Traminer (Gewurztraminer)	89	0	0	1	89	*1%*
Trebbiano	20	0	0	0	20	*0%*
Verdelho	109	0	0	0	109	*0%*
Vermentino	0	2	13	2	17	*12%*
Viognier	149	2	3	0	154	*0%*
Total white varieties	**8,595**	**128**	**42**	**43**	**8,808**	***0%***

Current plantings by variety and year planted

Variety	Current area in hectares					
	Pre-2008	*2008*	*2009*	*2010*	*Total area*	*% planted in 2010*
Red winegrapes						
Cabernet Sauvignon	3,118	14	38	6	3,176	*0%*
Grenache	372	2	4	4	382	*1%*
Malbec	25	0	1	0	26	*0%*
Mataro (Mourvedre)	262	0	0	0	263	*0%*
Merlot	1,159	8	4	0	1,171	*0%*
Other red	48	4	0	7	59	*12%*
Petit Verdot	508	0	0	0	508	*0%*
Pinot Noir	279	15	1	0	295	*0%*
Rubired	12	0	0	0	12	*0%*
Ruby Cabernet	179	0	1	0	180	*0%*
Sangiovese	15	0	0	0	15	*0%*
Shiraz	5,318	86	46	10	5,461	*0%*
Tarrango	15	0	0	0	15	*0%*
Tempranillo	30	7	2	3	41	*7%*
Total red varieties	**11,340**	**137**	**97**	**29**	**11,603**	***0%***
Unknown variety	233	0	0	0	233	*0%*
Rootstock block	31	0	0	0	31	*0%*
Tablegrapes - red	45	1	0	0	45	*0%*
Tablegrapes - white	24	0	0	0	24	*0%*
Multipurpose grapes - red	79	0	2	3	84	*4%*
Multipurpose grapes - white	30	0	0	0	31	*0%*
Total all varieties	**20,377**	**266**	**140**	**75**	**20,859**	***0%***

Riverland

Estimated supply and committed intake 2012 - 2016

	2012				2014				2016			
	Est Supply [1]	Committed intake [2]			Est Supply [1]	Committed intake [2]			Est Supply [1]	Committed intake [2]		
Variety		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*
Red winegrapes												
Barbera	0	0	7	7	0	0	7	7	0	0	7	7
Cabernet Franc	0	30	5	35	0	30	5	35	0	30	5	35
Cabernet Sauvignon	56,716	11,183	48,000	59,183	57,112	11,283	44,486	55,769	57,112	11,183	41,904	53,087
Carignan	0	25	0	25	0	25	0	25	0	25	0	25
Grenache	7,896	745	3,252	3,997	7,980	750	3,016	3,766	7,980	750	2,291	3,041
Malbec	453	124	295	419	460	124	295	419	460	124	295	419
Mataro	4,728	0	2,536	2,536	4,728	0	2,255	2,255	4,728	0	2,146	2,146
Merlot	22,220	6,318	16,743	23,060	22,258	6,318	14,844	21,162	22,258	6,272	13,951	20,223
Muscat a Petit Grains Rouge / Rose	0	4	95	99	0	4	105	109	0	4	2	5
Nebbiolo	0	0	4	4	0	0	4	4	0	0	4	4
Other Red	5,805	236	770	1,007	5,912	289	745	1,034	5,912	289	606	896
Petit Verdot	10,166	4,283	6,771	11,054	10,166	4,283	6,175	10,457	10,166	4,257	5,886	10,143
Pinot Noir	5,882	956	6,258	7,214	5,894	956	5,480	6,436	5,894	956	4,716	5,672
Ruby Cabernet	3,586	1,500	601	2,100	3,593	1,500	408	1,907	3,593	1,480	408	1,887
Sangiovese	310	358	114	472	310	358	114	472	310	358	164	521
Shiraz	103,127	18,065	77,536	95,601	103,660	18,200	69,302	87,502	103,660	18,080	65,189	83,269
Tarrango	293	0	0	0	293	0	0	0	293	0	0	0
Tempranillo	757	4	658	662	801	185	308	493	801	185	219	405
Touriga	0	50	57	108	0	54	57	112	0	54	57	112
Zinfandel	0	0	2	2	0	0	2	2	0	0	2	2
Total red winegrapes	**221,939**	**43,879**	**163,706**	**207,585**	**223,168**	**44,359**	**147,608**	**191,967**	**223,168**	**44,047**	**137,852**	**181,898**

[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*

Riverland

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
White winegrapes												
Canada Muscat	0	0	151	151	0	0	151	151	0	0	101	101
Chardonnay	103,152	11,366	96,281	107,647	103,163	11,411	82,219	93,630	103,163	11,361	77,227	88,588
Chenin Blanc	2,537	146	2,292	2,438	2,537	146	2,138	2,284	2,537	121	2,042	2,163
Colombard	21,932	2,853	25,682	28,535	21,953	2,853	24,201	27,055	21,953	2,828	23,705	26,533
Crouchen	0	85	49	134	0	85	49	134	0	85	49	134
Doradillo	2,121	523	122	645	2,121	523	122	645	2,121	523	122	645
Marsanne	0	0	0	0	0	0	0	0	0	0	0	0
Muscadelle	260	106	72	178	260	106	2	108	260	106	2	108
Muscat a Petit Grains Blanc	3,289	347	3,249	3,596	3,417	347	3,251	3,598	3,417	347	3,112	3,459
Muscat Gordo Blanco	26,190	2,642	22,104	24,746	26,489	2,652	17,283	19,935	26,489	2,566	16,536	19,103
Other White	5,232	747	949	1,696	5,414	827	969	1,797	5,414	827	909	1,736
Palomino	270	2	0	2	270	3	0	3	270	3	0	3
Pedro Ximenes	0	0	30	30	0	0	30	30	0	0	30	30
Pinot Gris	1,078	413	789	1,202	1,291	413	1,067	1,480	1,291	413	1,067	1,480
Riesling	4,283	880	3,096	3,976	4,283	880	3,058	3,937	4,283	880	3,058	3,937
Roussanne	0	0	8	8	0	0	8	8	0	0	8	8
Sauvignon Blanc	12,207	3,573	10,622	14,195	12,243	3,598	9,859	13,457	12,243	3,598	9,690	13,288
Semillon	9,372	4,679	4,354	9,033	9,372	4,679	3,513	8,192	9,372	4,679	2,983	7,662
Sultana	4,838	0	814	814	4,847	0	793	793	4,847	0	793	793
Taminga	0	0	118	118	0	0	118	118	0	0	118	118
Traminer	2,216	252	2,450	2,701	2,226	252	2,460	2,711	2,226	252	2,268	2,519
Trebbiano	508	0	21	21	508	0	21	21	508	0	21	21
Verdelho	2,725	35	2,116	2,151	2,725	35	1,971	2,006	2,725	0	1,693	1,693
Viognier	2,742	276	1,494	1,769	2,767	276	831	1,107	2,767	276	748	1,024
Total white winegrapes	**204,950**	**28,924**	**176,862**	**205,786**	**205,885**	**29,086**	**154,113**	**183,199**	**205,885**	**28,865**	**146,281**	**175,146**
All winegrapes	**426,889**	**72,803**	**340,569**	**413,372**	**429,053**	**73,445**	**301,721**	**375,166**	**429,053**	**72,911**	**284,133**	**357,044**

[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*