

# Riverland wine region

## Regional summary report 2008



### *Vintage report*

The year started with some trepidation, as growers looked for indications on the likely availability of water and prices for grapes. Once an indication had been given regarding prices, growers were able to move into the water market to secure sufficient supply for the coming vintage.

The spring and summer conditions were quite beneficial to growing, with few extreme heat days and very little rain. This resulted in quite good cropping levels and an early start to vintage, with the first grapes coming off in the second week of January.

For anything harvested prior to the end of February the quality of fruit was very high. A week of extreme heat hit at the end of February which ripened everything quicker than the wineries could process it, causing some concern to both growers and winemakers. However, due to the early season the majority of the fruit had been processed by then so this did not affect the overall quality of the vintage greatly.

*Jim Caddy*

*Phylloxera and Grape Industry Board*

### *Overview of vintage statistics*

The harvest from the Riverland was 401.300 tonnes in 2008, around 25% above the 2007 harvest, and well above preliminary forecasts for the region of around 250,000 tonnes. The total value of purchased grapes increased by over \$100 million - from \$124 million to \$230 million. The average purchase value for the major varieties increased significantly; Shiraz was up from \$391 to \$622 per tonne, Cabernet Sauvignon increased from \$399 per tonne to \$626 per tonne, and Chardonnay increased from \$395 to \$522. However, the cost of buying water added substantially to the cost of growing grapes this season.

There were just under 300 hectares of new plantings in the Riverland in spring 2007 (including top-working and replacements) compared with 344 hectares in the previous year. The amount of new planting has been declining for several years, and in 2007 only represents 1% of the total area planted. Most of the new plantings were in Sauvignon Blanc and Pinot Gris.

The estimated production from the Riverland for 2009 is 360,000 tonnes (this estimate assumes restricted access to water for irrigators in the region and is well below the region's potential of close to 500,000 tonnes). The wineries' committed intake is over 450,000 tonnes, so there is likely to be a significant shortfall in supply.

By 2013, assuming an improvement in water allocations and growing conditions, the estimated production is 453,000 tonnes, of which 85% (386,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 67,000 tonnes (15%) as yet uncommitted. However, across the state, even if growing conditions return to "normal", there is expected to be little or no overall surplus compared with demand in 2013 (see State Summary section).

# Riverland

## Winegrape intake summary - vintage 2008

Variety	Tonnes purchased	Lowest price <sup>1</sup>	Highest price <sup>1</sup>	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
<b>Red winegrapes</b>								
Barbera	21			\$8,540	\$412	0	21	\$8,540
Cabernet Franc	51			\$24,862	\$484	24	75	\$36,412
Cabernet Sauvignon	52,259	\$100	\$950	\$32,694,368	\$626	8,002	60,261	\$37,700,274
Carignan	0					102	102	\$62,321
Grenache	4,792	\$250	\$775	\$2,641,393	\$551	108	4,900	\$2,701,113
Malbec	225			\$105,761	\$470	145	370	\$173,941
Mataro	3,219	\$250	\$881	\$1,848,780	\$574	0	3,219	\$1,848,780
Merlot	20,206	\$250	\$850	\$12,164,134	\$602	6,505	26,711	\$16,080,401
Other Red	899	\$300	\$750	\$447,006	\$497	157	1,056	\$524,951
Petit Verdot	7,804	\$250	\$823	\$3,872,280	\$496	6,259	14,063	\$6,978,065
Pinot Noir	6,038	\$540	\$750	\$3,914,565	\$648	175	6,213	\$4,028,029
Ruby Cabernet	2,130	\$100	\$500	\$893,684	\$420	919	3,049	\$1,279,341
Sangiovese	105			\$31,413	\$300	358	463	\$138,867
Shiraz	92,221	\$100	\$975	\$57,399,162	\$622	10,108	102,330	\$63,690,707
Tarrango	143			\$57,288	\$400	0	143	\$57,288
Tempranillo	328	\$500	\$650	\$192,563	\$588	27	354	\$208,385
Touriga	34			\$25,130	\$744	48	81	\$60,650
Zinfandel	2			\$912	\$475	0	2	\$912
<b>Total red winegrapes</b>	<b>190,475</b>			<b>\$116,321,840</b>		<b>32,937</b>	<b>223,413</b>	<b>\$135,578,977</b>

<sup>1</sup> 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.

# Riverland

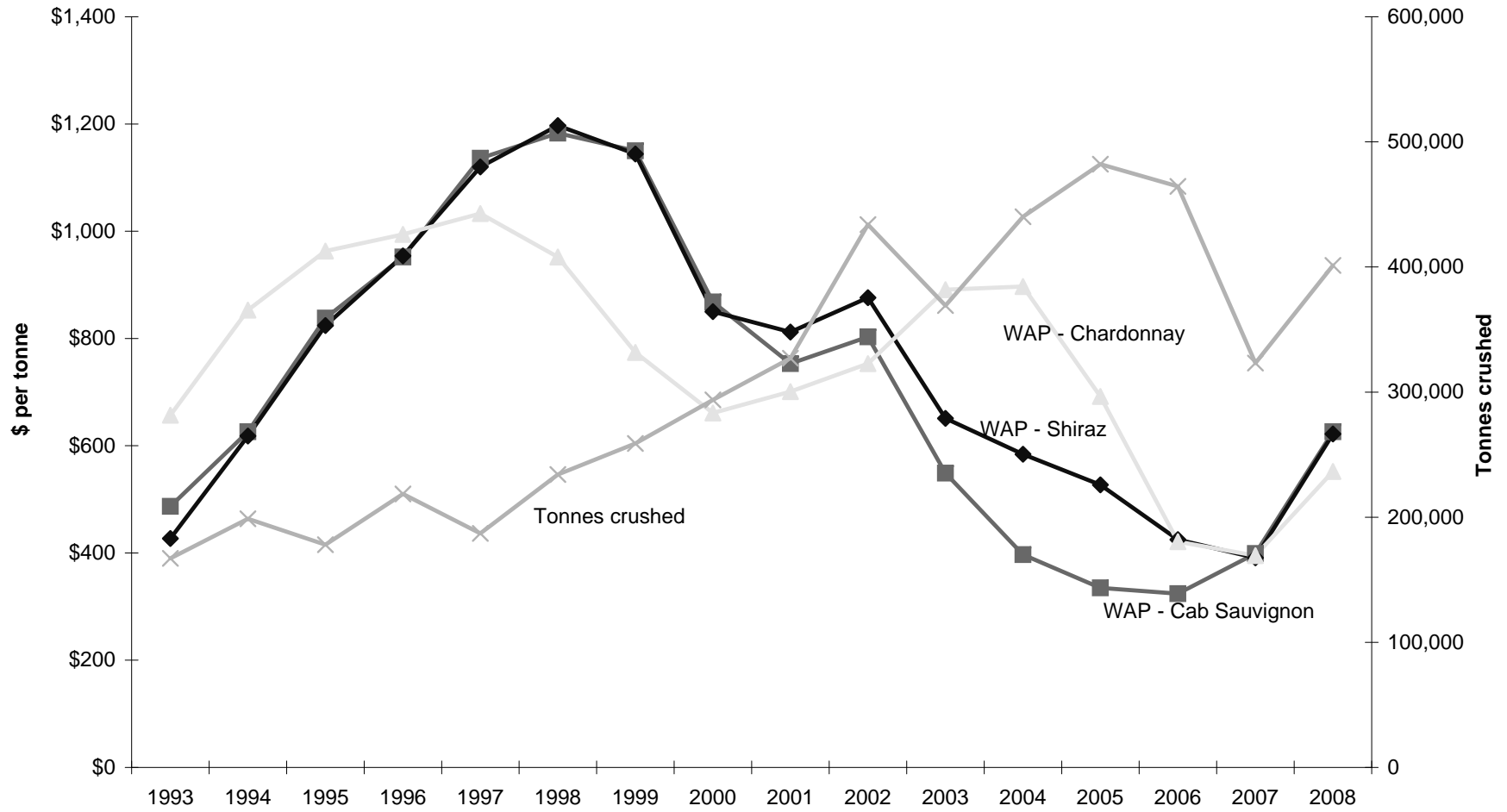
## Winegrape intake summary - vintage 2008

Variety	Tonnes purchased	Lowest price <sup>1</sup>	Highest price <sup>1</sup>	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
<b>White winegrapes</b>								
Canada Muscat	20			\$8,811	\$450	39	59	\$26,415
Chardonnay	88,457	\$100	\$825	\$48,802,034	\$552	9,960	98,417	\$54,297,011
Chenin Blanc	3,209	\$250	\$475	\$1,309,666	\$408	0	3,209	\$1,309,666
Colombard	24,913	\$100	\$600	\$10,716,098	\$430	1,232	26,145	\$11,245,939
Crouchen	51			\$23,285	\$455	56	107	\$48,771
Doradillo	354	\$250	\$400	\$112,602	\$318	500	854	\$271,899
Marsanne	20			\$10,311	\$525	0	20	\$10,311
Muscadelle	103	\$400	\$528	\$46,159	\$449	21	124	\$55,705
Muscat a Petit Grains Blanc	1,608	\$500	\$730	\$844,907	\$525	250	1,858	\$976,244
Muscat Gordo Blanco	11,872	\$400	\$704	\$6,253,796	\$527	599	12,471	\$6,569,078
Other White	2,120	\$200	\$700	\$930,475	\$439	413	2,533	\$1,111,595
Palomino	54			\$20,188	\$376	14	68	\$25,451
Pedro Ximenes	15			\$4,745	\$325	0	15	\$4,745
Pinot Gris	294	\$360	\$800	\$192,380	\$654	0	294	\$192,380
Riesling	2,415	\$350	\$557	\$1,189,473	\$492	577	2,992	\$1,473,401
Roussanne	6			\$3,587	\$608	0	6	\$3,587
Sauvignon Blanc	6,704	\$200	\$800	\$4,641,004	\$692	2,767	9,471	\$6,556,277
Semillon	6,076	\$330	\$650	\$2,961,672	\$487	5,135	11,211	\$5,464,930
Sultana	612	\$250	\$400	\$206,687	\$338	0	612	\$206,687
Taminga	91			\$45,164	\$495	21	112	\$55,545
Traminer	841			\$453,829	\$539	1,158	1,999	\$1,078,390
Trebbiano	89			\$31,101	\$349	0	89	\$31,101
Verdelho	2,287	\$350	\$600	\$1,053,156	\$460	1,018	3,306	\$1,522,158
Viognier	1,675	\$250	\$1,000	\$1,175,657	\$702	242	1,916	\$1,345,211
<b>Total white winegrapes</b>	<b>153,886</b>			<b>\$81,036,788</b>		<b>24,001</b>	<b>177,887</b>	<b>\$93,882,498</b>
<b>Total all winegrapes<sup>2</sup></b>	<b>344,362</b>			<b>\$197,358,628</b>		<b>56,939</b>	<b>401,300</b>	<b>\$229,461,475</b>

<sup>1</sup> 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.

<sup>2</sup> The estimated non-response rate for the Riverland is 2%.

Historical Weighted Average Price vs tonnes crushed



## Riverland

## Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2007
	Pre-2005	2005	2006	2007		
<b>White winegrapes</b>						
Biancone (White Grenache)	8	0	0	0	8	0%
Chardonnay	4634	211	55	44	4944	1%
Chenin Blanc	162	0	0	0	162	0%
Colombard	926	13	12	0	951	0%
Crouchen	12	0	0	0	12	0%
Doradillo	128	0	0	0	128	0%
Muscadelle (Tokay)	17	0	0	0	17	0%
Muscat Blanc (Frontignac)	67	7	28	4	106	4%
Muscat Gordo Blanco	1033	56	89	21	1200	2%
Other white	38	0	4	2	45	4%
Palomino	38	0	0	0	38	0%
Pinot Gris	13	6	16	26	60	42%
Riesling	230	0	6	1	237	0%
Sauvignon Blanc	225	15	54	74	367	20%
Semillon	373	3	12	7	396	2%
Sultana	347	2	1	0	350	0%
Sylvaner	35	0	0	0	35	0%
Traminer	110	4	0	0	114	0%
Trebbiano	26	0	0	0	26	0%
Verdelho	118	2	0	0	120	0%
Viognier	77	32	20	29	158	18%
<b>Total white winegrapes</b>	<b>8616</b>	<b>352</b>	<b>299</b>	<b>209</b>	<b>9475</b>	<b>2%</b>

# Riverland

## Current plantings by variety and year planted

Variety	Pre-2005	2005	2006	2007	Total area	% planted in 2007
<b>Red winegrapes</b>						
Cabernet Sauvignon	3292	2	22	13	3329	0%
Carignan	18	0	0	0	18	0%
Durif	15	0	0	0	15	0%
Grenache	416	1	0	0	417	0%
Malbec	37	0	0	0	37	0%
Mataro (Mourvedre)	321	0	0	0	321	0%
Merlot	1177	6	10	8	1202	1%
Other red	45	1	1	1	48	3%
Petit Verdot	569	0	0	0	569	0%
Pinot Noir	235	8	4	22	269	8%
Rubired	11	3	0	0	14	0%
Ruby Cabernet	332	0	0	0	332	0%
Sangiovese	21	0	0	0	21	0%
Shiraz	5304	142	68	37	5552	1%
Tarrango	22	0	0	0	22	0%
Tempranillo	27	0	0	0	27	0%
<b>Total red winegrapes</b>	<b>11842</b>	<b>163</b>	<b>106</b>	<b>82</b>	<b>12193</b>	<b>1%</b>
<b>Unknown variety</b>	<b>585</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>585</b>	<b>0%</b>
Rootstock Block	27	12	0	0	39	0%
Multipurpose - red	85	11	11	0	106	0%
Multipurpose - white	39	0	0	0	39	0%
Tablegrapes - red	42	0	0	0	42	0%
Tablegrapes - white	21	0	0	0	21	0%
<b>Total non-winegrapes</b>	<b>214</b>	<b>23</b>	<b>11</b>	<b>0</b>	<b>248</b>	<b>0%</b>
<b>Total all varieties</b>	<b>21257</b>	<b>539</b>	<b>415</b>	<b>291</b>	<b>22501</b>	<b>1%</b>

Variety	2009				2011				2013			
	Est Supply <sup>1</sup>	Total committed intake <sup>2</sup>		Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Total committed intake <sup>2</sup>		Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Total committed intake <sup>2</sup>		Available supply <sup>3</sup>
		Winery grapes	Contract purchases			Winery grapes	Contract purchases			Winery grapes	Contract purchases	
<b>Red winegrapes</b>												
Cabernet Franc	95	26	80	0	176	26	59	91	176	26	59	91
Cabernet Sauvignon	54,803	8,789	58,264	0	57,928	8,907	55,149	0	58,470	9,126	51,259	0
Carignan	138	133	0	5	138	133	0	5	138	133	0	5
Grenache	6,434	649	4,631	1,154	7,683	649	4,151	2,883	7,825	649	3,320	3,855
Malbec	391	131	341	0	396	131	341	0	396	131	341	0
Mataro	3,024	0	3,153	0	3,807	0	2,791	1,016	3,807	0	2,442	1,365
Merlot	20,041	7,236	17,904	0	23,179	7,410	17,358	0	23,575	7,431	14,311	1,833
Other red	899	162	433	343	1,677	162	519	1,097	2,135	162	358	1,616
Petit Verdot	7,852	5,113	6,500	0	9,924	5,113	6,073	0	9,983	5,113	5,149	0
Pinot Noir	5,180	266	6,434	0	5,943	266	5,828	0	6,317	266	5,729	322
Ruby Cabernet	3,739	899	1,921	920	4,493	899	1,396	2,198	4,505	899	1,161	2,445
Sangiovese	296	294	176	0	540	294	176	70	540	294	176	70
Shiraz	87,395	13,048	95,881	0	101,438	13,048	87,105	1,285	103,568	13,048	77,802	12,718
Tarrango	160	0	38	122	1,681	0	38	1,644	1,681	0	38	1,644
Tempranillo	258	0	335	0	287	0	335	0	287	0	192	95
<b>Total red winegrapes</b>	<b>190,704</b>	<b>36,745</b>	<b>196,091</b>	<b>0</b>	<b>219,290</b>	<b>37,036</b>	<b>181,321</b>	<b>934</b>	<b>223,401</b>	<b>37,276</b>	<b>162,338</b>	<b>23,787</b>



Variety	2009				2011				2013			
	Est Supply <sup>1</sup>	Total committed intake <sup>2</sup>		Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Total committed intake <sup>2</sup>		Available supply <sup>3</sup>	Est Supply <sup>1</sup>	Total committed intake <sup>2</sup>		Available supply <sup>3</sup>
		Winery grapes	Contract purchases			Winery grapes	Contract purchases			Winery grapes	Contract purchases	
<b>White winegrapes</b>												
Chardonnay	97,963	12,831	104,866	0	114,042	12,611	95,674	5,757	118,155	12,611	82,450	23,094
Chenin Blanc	3,037	0	2,876	161	4,550	0	2,527	2,023	4,776	0	2,274	2,502
Colombard	21,750	1,400	31,557	0	29,950	1,288	30,647	0	30,894	1,288	29,329	277
Crouchen	108	83	55	0	124	83	55	0	124	83	55	0
Doradillo	1,795	736	239	820	1,752	736	175	842	1,752	736	160	856
Muscadelle	199	12	138	49	248	12	138	98	248	12	66	169
Muscat a Petit Grains Blanc	1,022	256	3,032	0	1,332	317	3,188	0	1,663	327	3,174	0
Muscat Gordo Blanco	18,188	1,124	18,541	0	27,910	1,124	19,874	6,911	31,955	1,124	16,114	14,716
Other White	1,386	669	2,809	77	2,043	669	1,273	130	2,223	1,072	908	269
Palomino	219	51	0	168	384	51	0	333	384	51	0	333
Pinot Gris	98	61	552	0	474	286	540	0	782	322	509	0
Riesling	3,728	692	2,431	605	4,624	917	2,431	1,276	4,934	917	2,397	1,619
Sauvignon Blanc	4,855	2,760	9,352	0	7,703	3,123	12,178	0	9,323	3,174	11,246	0
Semillon	7,387	4,736	6,585	0	11,596	4,736	5,783	1,077	12,555	4,736	4,884	2,935
Sultana	1,457	0	1,683	0	2,092	0	1,604	488	2,096	0	1,582	514
Taminga	145	0	120	25	145	0	120	25	145	0	120	25
Traminer	2,133	1,012	1,120	1	2,577	992	1,154	432	2,577	992	1,071	514
Verdelho	1,801	920	1,813	0	2,739	920	1,760	58	2,739	920	1,392	426
Viognier	1,878	377	2,450	0	2,273	306	2,530	0	2,526	306	1,605	616
<b>Total white winegrapes</b>	<b>169,148</b>	<b>27,721</b>	<b>190,220</b>	<b>0</b>	<b>216,557</b>	<b>28,170</b>	<b>181,650</b>	<b>6,737</b>	<b>229,851</b>	<b>28,671</b>	<b>159,339</b>	<b>41,841</b>
<b>Total all winegrapes</b>	<b>359,852</b>	<b>64,465</b>	<b>386,311</b>	<b>0</b>	<b>435,847</b>	<b>65,206</b>	<b>362,970</b>	<b>7,671</b>	<b>453,252</b>	<b>65,948</b>	<b>321,677</b>	<b>65,628</b>

<sup>1</sup> Supply forecast produced by ABARE based on the ABS Vineyard Survey 2007

<sup>2</sup> A raising factor of 1.02 has been applied to committed intake to allow for non-respondents

<sup>3</sup> Where total committed intake is greater than estimated supply, the available supply is recorded as zero.