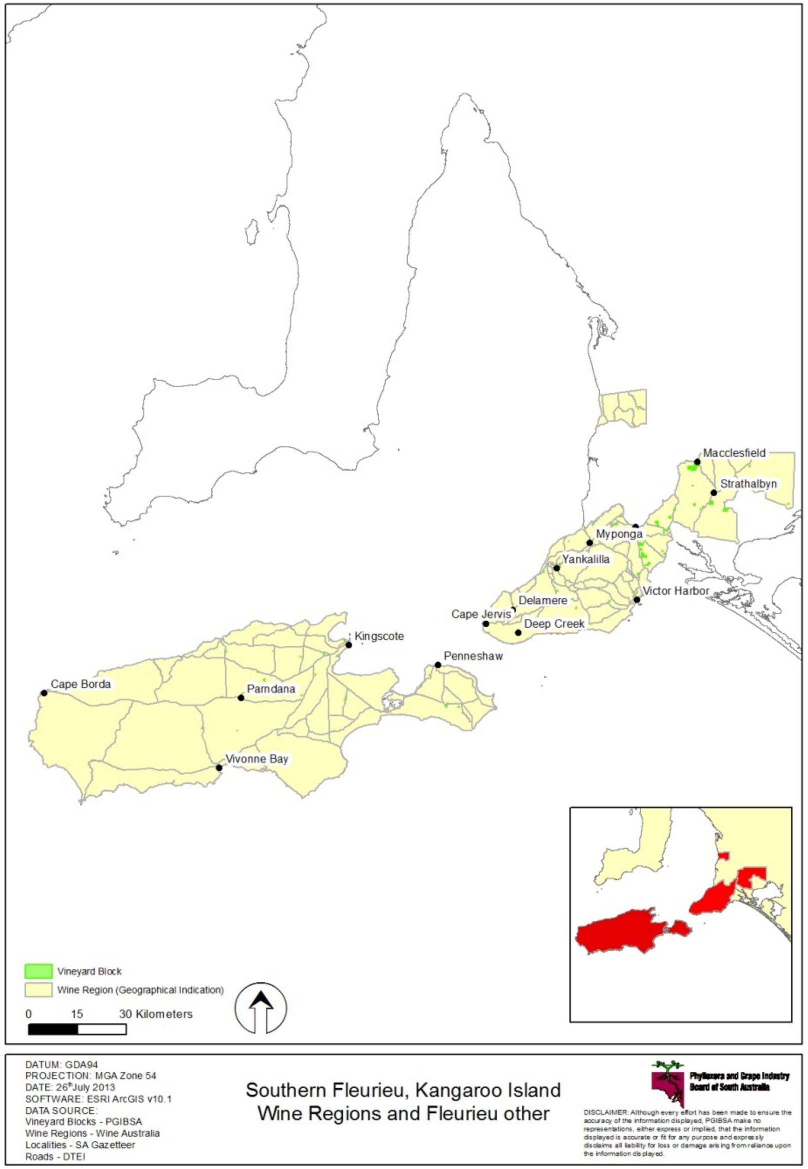

SA Winegrape Crush Survey

Regional Summary Report – 2015

Fleurieu Zone (other) Wine Region

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 Wine Australia.

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 are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 90%; however, individual regions may vary. Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price 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 (May 2015).

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.

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. It should also be noted that in minor varieties there may sometimes be very few purchases contributing towards a calculated average purchase value.

Price dispersion data (shaded columns in Intake Summary tables)

All purchases for each variety are grouped into categories according to the price paid for that fruit. The tonnes in each category are converted into a percentage of the total tonnes purchased, giving an indication of what share of fruit was purchased in each price range category. The categories are given nominal titles of A to E for convenience but these do not correspond with grades used by any particular winery.

Estimated total value of all grapes

The estimated total value of all 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.

Explanations and Definitions cont.

PLANTING DATA

Source of planting data tables

Planting data is not collected by the 2015 Australian Wine Sector Survey. 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 report details of their plantings on an annual basis. This information is kept strictly confidential.

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.

For more information on registration of vineyards, please contact the Phylloxera and Grape Industry Board office on (08) 8273 0550.

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2015 and include all plantings from the 2014 planting season.
2. 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 2015 report compared with previous reports.
3. Where a zero (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.

FLEURIEU ZONE (OTHER)

Vintage overview

Fleurieu zone (other) includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are near but outside the larger GI regions of Currency Creek, McLaren Vale and Langhorne Creek (referred to as "Fleurieu zone (other)" in tables). The total area of vines included in this definition is 949 hectares.

Overview of vintage statistics

The harvest from the Fleurieu zone (other) region was 3,603 tonnes in 2015, compared with 2,869 tonnes in 2014. The total estimated value of grapes from these regions increased from $2.2 million to $2.8 million. The average purchase price for Shiraz increased by $106 to $871 per tonne and Pinot Gris increased from $802 to $873 while the average prices of the other major varieties declined slightly.

The price dispersion data shows that 69% of red tonnages and 49% of white tonnages were purchased at between $600 and $1500. 21% of reds were purchased at below $300 per tonne, while none of the white tonnages were in this lowest price range.

Over the past five years, the average crush was 3,001 tonnes implying that 2015 yields were above average. The minimum crush over the period was 2,293 tonnes in 2014. This year's vintage represented the largest crush in recent history.

Total plantings in this group of regions decreased slightly from 966 hectares to 948 hectares. There were negligible new plantings.

FLEURIEU ZONE (OTHER)

Winegrape intake summary – vintage 2015

Variety	Tonnes purchased	E (less than $300)	D ($300-$600)	C ($600-$1,500)	B ($1,500-$2,000)	A (above $2,000)	Total value purchased	Calc avg. purch. Value per tonne	Winery grown fruit	Total crushed[2]	Est total value ALL grapes
Cabernet Sauvignon	481	61%	7%	26%	3%	3%	$418,721	$871	165	645	$562,283
Malbec	-	na	na	na	na	na	$0		1	1	$434
Merlot	28	na	na	na	na	na	$19,035	$675	17	45	$30,441
Pinot Noir	23	na	na	na	na	na	$19,601	$850	97	120	$101,704
Shiraz	879	1%	3%	91%	5%	1%	$765,621	$871	315	1,193	$1,039,754
Red Total	1,410	21%	4%	69%	4%	2%	$1,222,978	$867	593	2,004	$1,734,616
Chardonnay	527	0%	91%	8%	1%	0%	$297,494	$564	66	593	$334,977
Pinot Gris and Pinot Grigio	448	0%	0%	93%	7%	0%	$391,037	$873	14	462	$403,523
Riesling	-	na	na	na	na	na	$0		7	7	$4,564
Sauvignon Blanc	181	0%	26%	74%	0%	0%	$117,323	$648	193	374	$242,576
Semillon	48	na	na	na	na	na	$14,364	$300	89	136	$40,920
Viognier	-	na	na	na	na	na	$0		16	16	$10,655
Other white	-	na	na	na	na	na	$0		11	11	$7,291
White Total	1,204	0%	48%	49%	3%	0%	$820,218	$681	396	1,600	$1,044,507
Grand Total	2,614	11%	24%	60%	4%	1%	$2,043,196	$782	989	3,603	$2,779,123

1 Pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

FLEURIEU ZONE (OTHER)

Current plantings by variety and year planted

Current area in hectares

Fleurieu zone - other

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Cabernet Sauvignon	34	2	0	0	37	0%
Other Red	19	2	0	1	22	3%
Shiraz	120	4	4	0	128	0%
Chardonnay	29	0	0	0	29	0%
Other White	11	0	0	0	11	0%
Pinot Gris	26	0	0	0	26	0%
Sauvignon Blanc	30	0	0	0	30	0%
Unknown variety	34	0	0	0	34	0%
Total all varieties	**303**	**9**	**4**	**1**	**316**	**0%**

Kangaroo Island

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	41	0	0	0	41	0%
Merlot	5	0	0	0	5	0%
Other Red	7	0	0	0	7	0%
Shiraz	49	0	0	0	49	0%
Chardonnay	8	0	0	0	8	0%
Other White	4	0	0	0	4	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	7	0	0	0	7	0%
Unknown variety	5	0	0	0	5	0%
Total all varieties	**135**	**0**	**0**	**0**	**135**	**0%**

Southern Fleurieu

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Cabernet Sauvignon	72	0	0	0	72	0%
Merlot	35	0	0	0	35	0%
Other Red	6	0	0	0	6	0%
Pinot Noir	28	1	0	0	29	0%
Shiraz	120	0	6	0	126	0%
Chardonnay	92	0	0	0	92	0%
Other White	4	0	0	0	4	0%
Pinot Gris	25	0	0	0	25	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	69	0	0	0	69	0%
Semillon	22	0	0	0	22	0%
Verdelho	1	0	0	0	1	0%
Viognier	9	0	0	0	9	0%
Unknown variety	3	0	0	0	3	0%
Total all varieties	**491**	**2**	**6**	**0**	**498**	**0%**

Source: Phylloxera and Grape Industry Board of South Australia