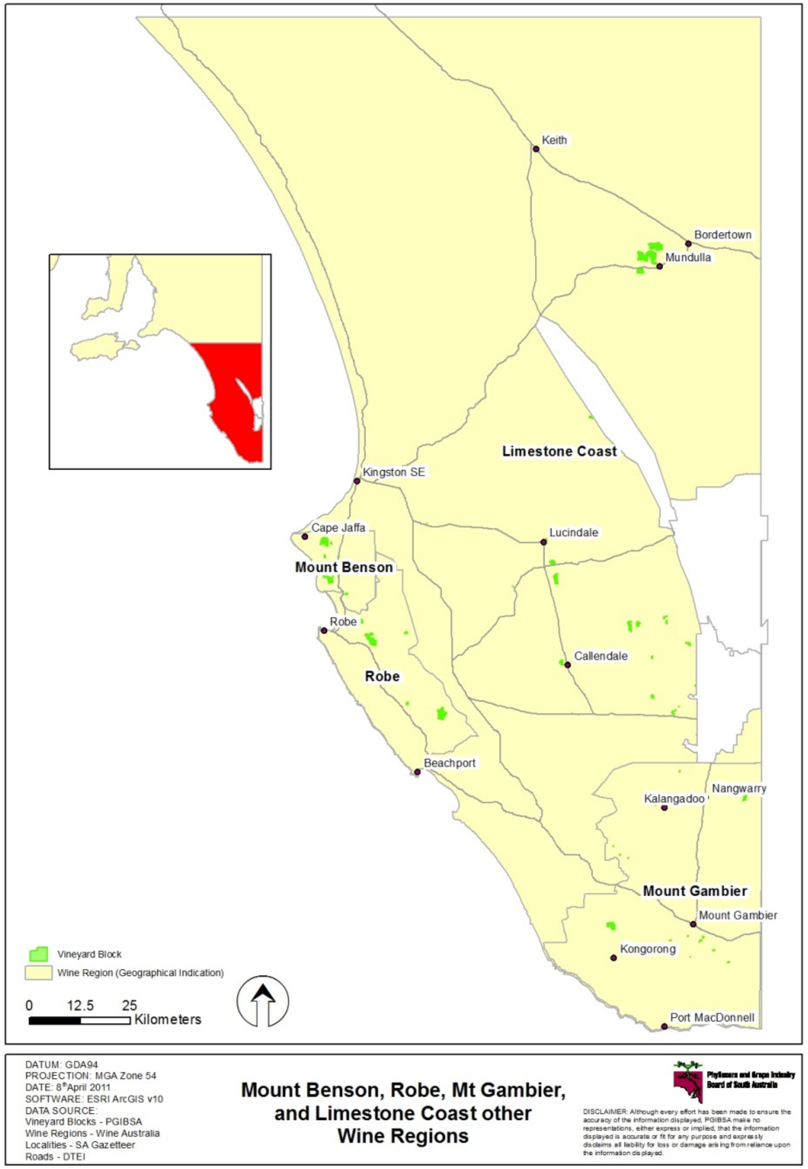

SA Winegrape Crush Survey

Regional Summary Report – 2015

Limestone Coast (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.

LIMESTONE COAST (OTHER)

Vintage overview

Limestone Coast zone (other) includes the GI regions of Mt Benson, Mount Gambier and Robe, and the vineyards around Bordertown, Lucindale, and Beachport, as well as those near but outside the declared GI regions of Padthaway, Coonawarra and Wrattonbully. The total area of vines included in this definition is around 3,338 hectares.

Vintage Overview – Mount Benson

The 2015 vintage started two weeks earlier than the previous five year average which felt very early. While the timing of budburst was about on par with expectations, temperatures in spring were consistently above average and soils were very dry. Weather conditions closer to harvest were very steady, with only three days above 35°C.

Yields varied across the region with some vineyards cropping slightly heavier than average and others reporting lower yields, albeit an improvement on last year by all accounts. Despite the early start, the heavier cropping vineyards ripened later in the season, meaning harvest lagged into cooler weather at the end of the season and finished about on time. A continuation of dry conditions throughout the season meant all vineyards were free from any disease issues.

The slow steady finish to the season rewarded us in Mount Benson and both Cabernet and Shiraz are looking incredibly strong with bright fruit, silky tannins and great intensity. Expectations are that the wines from this vintage will evolve to be amongst the region's best yet. Sauvignon Blanc and Pinot Gris are also looking excellent with very good natural acidity.

Anna Hooper
Cape Jaffa Wines

Overview of vintage statistics

The harvest from the Limestone Coast zone (other) was 14,326 tonnes, compared with 12,728 tonnes in 2014 – an increase of 13%. The total estimated value of fruit from this area was $12.5 million compared with $8.1 million last year. This represents over a 50% increase in value.

The average prices of all the red varieties increased significantly – some by several hundred dollars per tonne. This may be a result of the changed methodology resulting in some fruit being classified in a different region from previously.

The price dispersion data shows that 91% of red tonnages were purchased at between $600 and $1500, while for the whites, 74% were purchased between $600 and $1500 and 26% between $300 and $600.

Over the past five years, the average crush was 9,628 tonnes implying that 2015 yields were basically on par with average. The minimum crush over the period was 6,460 tonnes in 2014 with the maximum crush of 12,626 recorded in 2011.

There were 9 hectares of Cabernet Sauvignon planted in Robe in spring 2014. Other than that, there were no changes to the plantings in these regions.

LIMESTONE COAST (OTHER) Winegrape intake summary – vintage 2015

Incorporates Mount Benson (1,674 tonnes), Mt. Gambier (594 tonnes), Robe (1,811 tonnes) and Limestone Coast zone – other (10,248 tonnes)

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
Barbera	-	na	na	na	na	na	$0		5	5	$4,644
Cabernet Franc	166	0%	0%	100%	0%	0%	$146,876	$885	11	176	$156,247
Cabernet Sauvignon	2,308	3%	0%	96%	0%	1%	$2,077,097	$900	1,741	4,049	$3,644,357
Dolcetto	7	na	na	na	na	na	$5,968	$800	30	37	$29,688
Lagrein	14	na	na	na	na	na	$12,807	$900	-	14	$12,807
Malbec	241	0%	0%	100%	0%	0%	$205,701	$852	-	241	$205,701
Mataro	244	0%	0%	100%	0%	0%	$229,248	$938	-	244	$229,248
Merlot	1,462	1%	32%	67%	0%	0%	$1,110,285	$760	855	2,317	$1,760,076
Petit Verdot	298	0%	27%	73%	0%	0%	$228,362	$766	23	321	$245,838
Pinot Noir	179	0%	11%	89%	0%	0%	$188,690	$1,055	235	414	$436,532
Shiraz	2,860	0%	0%	98%	1%	1%	$2,867,361	$1,003	911	3,771	$3,780,773
Tempranillo	9	na	na	na	na	na	$13,174	$1,400	30	39	$55,174
Other red	20	na	na	na	na	na	$24,958	$1,274	-	20	$24,958
Red Total	7,808	1%	7%	91%	0%	1%	$7,110,526	$911	3,841	11,649	$10,586,044

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

LIMESTONE COAST (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
Chardonnay	338	0%	64%	36%	0%	0%	$219,414	$649	826	1,164	$754,908
Marsanne	8	na	na	na	na	na	$3,501	$425	-	8	$3,501
Muscat a Petit Grains Blanc	30	na	na	na	na	na	$31,760	$1,050	-	30	$31,760
Pinot Gris and Pinot Grigio	127	0%	0%	100%	0%	0%	$116,922	$923	49	176	$162,028
Riesling	9	na	na	na	na	na	$10,373	$1,100	-	9	$10,373
Sauvignon Blanc	790	0%	2%	98%	0%	0%	$645,478	$817	115	905	$739,046
Semillon	105	0%	98%	2%	0%	0%	$59,050	$564	139	244	$137,746
Verdelho	17	na	na	na	na	na	$8,360	$500	102	118	$59,225
Viognier	11	na	na	na	na	na	$5,555	$500	8	19	$9,330
Other white	-	na	na	na	na	na	$0		4	4	$3,066
White Total	1,435	0%	26%	74%	0%	0%	$1,100,412	$767	1,242	2,677	$1,910,983
Grand Total	9,244	1%	10%	88%	0%	1%	$8,210,939	$888	5,082	14,326	$12,497,026

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

LIMESTONE COAST (OTHER) — Current plantings by variety and year planted

Current area in hectares

Bordertown

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Franc	30	0	0	0	30	0%
Cabernet Sauvignon	415	0	0	0	415	0%
Malbec	21	0	0	0	21	0%
Mataro (Mourvedre)	43	0	0	0	43	0%
Merlot	219	0	0	0	219	0%
Other Red	19	0	0	0	19	0%
Petit Verdot	43	0	0	0	43	0%
Shiraz	333	0	0	0	333	0%
Total red varieties	**1123**	**0**	**0**	**0**	**1123**	**0%**
White winegrapes						
Chardonnay	88	0	0	0	88	0%
Other White	8	0	0	0	8	0%
Pinot Gris	12	0	0	0	12	0%
Sauvignon Blanc	8	0	0	0	8	0%
Semillon	10	0	0	0	10	0%
Verdelho	6	0	0	0	6	0%
Total white varieties	**131**	**0**	**0**	**0**	**131**	**0%**
Total all varieties	**1254**	**0**	**0**	**0**	**1254**	**0%**

Mount Benson

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Franc	3	0	0	0	3	0%
Cabernet Sauvignon	115	0	0	0	115	0%
Merlot	52	0	0	0	52	0%
Petit Verdot	2	0	0	0	2	0%
Pinot Noir	2	0	0	0	2	0%
Shiraz	167	0	0	0	167	0%
Total red varieties	**340**	**0**	**0**	**0**	**340**	**0%**
White winegrapes						
Chardonnay	38	0	0	0	38	0%
Other White	17	0	0	0	17	0%
Pinot Gris	42	0	0	0	42	0%
Sauvignon Blanc	67	0	0	0	67	0%
Total white varieties	**164**	**0**	**0**	**0**	**164**	**0%**
Total all varieties	**504**	**0**	**0**	**0**	**504**	**0%**

Mount Gambier

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Franc	0	0	0	0	0	0%
Cabernet Sauvignon	13	0	0	0	13	0%
Merlot	1	0	0	0	1	0%
Pinot Noir	79	0	0	0	79	0%
Shiraz	0	0	0	0	0	0%
Total red varieties	**93**	**0**	**0**	**0**	**93**	**0%**
White winegrapes						
Chardonnay	42	0	0	0	42	0%
Pinot Gris	33	0	0	0	33	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	117	0	0	0	117	0%
Semillon	1	0	0	0	1	0%
Viognier	1	0	0	0	1	0%
Total white varieties	**200**	**0**	**0**	**0**	**200**	**0%**
Total all varieties	**292**	**0**	**0**	**0**	**292**	**0%**

Limestone Coast zone - other

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Franc	2	0	0	0	2	0%
Cabernet Sauvignon	344	0	0	0	344	0%
Merlot	45	0	0	0	45	0%
Petit Verdot	3	0	0	0	3	0%
Pinot Noir	10	0	0	0	10	0%
Shiraz	136	0	0	0	136	0%
Total red varieties	**540**	**0**	**0**	**0**	**540**	**0%**
White winegrapes						
Chardonnay	41	0	0	0	41	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	9	0	0	0	9	0%
Vermentino	2	0	0	0	2	0%
Total white varieties	**57**	**0**	**0**	**0**	**57**	**0%**
Total all varieties	**597**	**0**	**0**	**0**	**597**	**0%**

Robe

Variety	Pre-2012	2012	2013	2014	Total area	% planted in 2014
Red winegrapes						
Cabernet Sauvignon	226	0	0	9	235	4%
Malbec	2	0	0	0	2	0%
Merlot	58	0	0	0	58	0%
Other Red	0	0	3	0	3	0%
Pinot Noir	46	0	0	0	46	0%
Shiraz	171	0	0	0	171	0%
Total red varieties	**502**	**0**	**3**	**9**	**515**	**2%**
White winegrapes						
Chardonnay	101	5	0	0	106	0%
Pinot Gris	15	0	0	0	15	0%
Sauvignon Blanc	43	0	0	0	43	0%
Semillon	12	0	0	0	12	0%
Total white varieties	**172**	**5**	**0**	**0**	**177**	**0%**
Total all varieties	**674**	**5**	**3**	**9**	**691**	**1%**

Source: Phylloxera and Grape Industry Board of South Australia