

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 receipt – 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 and committed intake

The estimated supply and committed intake report has been removed from the 2014 Winegrape Crush Survey. It has been identified that the methodology used to determine the estimated supply requires review.

To assist industry stakeholders gain an understanding of state and regional estimated supply, the last 5 years actual total tonnes crushed at the state level and each region has been averaged. A range is then provided using the highest and lowest figures from the actual tonnes crushed.

The estimated committed intake is the amount of fruit that wineries are already committed to take in, for 2015. 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 cont.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2014 South Australian Crush 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 2014 and include all plantings from the 2013 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 2013 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 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.

South Australia (other)

Vintage overview

South Australia (other) includes the GI region of Southern Flinders Ranges, the Peninsulas zone, and the vineyards in Mount Lofty Ranges (other) and Lower Murray zone (other) – see map on cover page. The total area of vines included in this definition is 1,043 hectares.

Overview of vintage statistics

The harvest from South Australia (other) region was 3,206 tonnes in 2014, up by 264 tonnes (9%) on the 2013 harvest of 2,942 tonnes. There was an estimated non-response rate of 0% across the region. The total value of grapes from these areas slightly decreased from \$1.68 million to \$1.57 million. The average purchase value of the major varieties decreased. Of the red varieties – Shiraz down by \$68 per tonne to \$593 per tonne and Cabernet Sauvignon down by \$35 per tonne to \$541 per tonne. Of the white varieties – Chardonnay is down by \$37 per tonne to \$341 per tonne.

There were 12 hectares of new plantings across the area covered by SA zone (other) in spring 2013 (including top-working and replacements) with an increase in the total planted area of vines from 1,034 hectares in 2012 to 1,043 hectares in 2013. Shiraz accounted for 50% of the new plantings.

Over the last 5 years, the average South Australia (other) production was 3,866 tonnes, with a low of 2,942 tonnes in 2013 and a high of 4,689 tonnes in 2011. The 2014 crush is down by 20.6% against the last 5 year average. For 2015, the estimated committed intake is 2,466 tonnes.

South Australia - (other)

Winegrape intake summary - vintage 2014

*Incorporates Southern Flinders Rangers (593 tonnes), Mount Lofty Rangers zone - other (128 tonnes),
The Peninsulas (249 tonnes), and Lower Murray zone - other (2,236 tonnes).*

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								
Cabernet Sauvignon	407	\$230	\$1,500	\$220,153	\$541	46	453	\$244,971
Merlot	352	\$230	\$1,500	\$187,274	\$532	32	384	\$204,290
Other red	2			\$3,510	\$1,500	51	53	\$34,299
Petit Verdot	94			\$26,253	\$280	0	94	\$26,253
Ruby Cabernet	31			\$8,686	\$280	0	31	\$8,686
Shiraz	1,119	\$290	\$1,500	\$664,011	\$593	240	1,359	\$806,549
Total Red winegrapes	2,005			\$1,109,885		369	2,374	\$1,325,048
WHITE								
Chardonnay	360	\$180	\$425	\$122,575	\$341	4	364	\$123,903
Chenin Blanc	52			\$10,496	\$200	0	52	\$10,496
Colombard	173			\$28,611	\$165	0	173	\$28,611
Palomino	10			\$3,668	\$350	0	10	\$3,668
Pinot Gris	84			\$42,100	\$500	0	84	\$42,100
Riesling	13			\$2,648	\$200	4	17	\$3,448
Sauvignon Blanc	114			\$33,835	\$297	13	126	\$37,546
Viognier	0			\$0	\$0	4	4	\$1,208
Total White winegrapes	808			\$243,933		24	832	\$250,980
Grand Total All winegrapes	2,813			\$1,353,818		393	3,206	\$1,576,028

¹ Lowest and highest prices are only reported when there are at least three purchasers. Very low or high 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 SA - other is 0.0%.

South Australia - (other)

Current plantings by variety and year planted

	Variety	Current area in hectares				Total area	% planted in 2013
		Pre-2011	2011	2012	2013		
Lower Murray zone - other	Red winegrapes						
	Cabernet Sauvignon	75	0	0	0	75	0%
	Merlot	16	0	0	0	16	0%
	Other Red	26	0	0	0	26	0%
	Petit Verdot	16	0	0	0	16	0%
	Shiraz	138	0	1	0	139	0%
	Total red varieties	272	0	1	0	273	0%
	White winegrapes						
	Chardonnay	87	0	0	0	87	0%
	Colombard	16	0	0	0	16	0%
	Other White	29	0	0	0	29	0%
	Riesling	13	0	0	0	13	0%
	Sauvignon Blanc	11	0	0	0	12	0%
	Total white varieties	156	0	0	0	157	0%
	Unknown variety	14	0	0	0	14	0%
Total all varieties	442	0	2	0	443	0%	

	Variety	Current area in hectares				Total area	% planted in 2013
		Pre-2011	2011	2012	2013		
Southern Flinders Ranges	Red winegrapes						
	Cabernet Sauvignon	23	0	0	0	23	0%
	Merlot	6	0	0	0	6	0%
	Other Red	6	0	0	0	6	0%
	Shiraz	138	0	0	0	138	0%
	Total red varieties	172	0	0	0	172	0%
	Total white varieties	2	0	0	0	2	0%
	Total all varieties	174	0	0	0	174	0%

South Australia - (other)

Current plantings by variety and year planted

	Variety	Current area in hectares				Total area	% planted in 2013
		Pre-2011	2011	2012	2013		
Mount Lofty Ranges - other	Red winegrapes						
	Cabernet Sauvignon	71	0	0	3	74	4%
	Merlot	16	0	0	0	16	0%
	Other Red	19	2	0	3	24	13%
	Petit Verdot	6	0	0	0	6	0%
	Sangiovese	12	0	0	0	12	0%
	Shiraz	177	0	6	6	189	3%
	Total red varieties	300	2	6	12	320	4%
	White winegrapes						
	Chardonnay	4	0	0	0	4	0%
	Other White	5	4	0	0	9	0%
	Riesling	5	0	0	0	5	0%
	Semillon	1	0	0	0	1	0%
	Total white varieties	16	4	0	0	20	0%
	Germplasm	4	0	0	0	4	0%
	Unknown variety	4	0	0	0	4	0%
	Table grapes - white	0	1	0	0	1	0%
Total all varieties	324	6	6	12	349	4%	

	Variety	Current area in hectares				Total area	% planted in 2013
		Pre-2011	2011	2012	2013		
The Peninsulas	Red winegrapes						
	Cabernet Sauvignon	13	0	0	0	13	0%
	Other Red	3	0	0	0	3	0%
	Shiraz	13	0	0	0	13	0%
	Total red varieties	29	0	0	0	29	0%
	Total white varieties	10	0	0	0	10	0%
	Unknown	37	0	0	0	37	0%
	Total all varieties	76	0	0	0	77	0%
	Total for South Australia (other)	1,016	6	8	12	1,043	0%