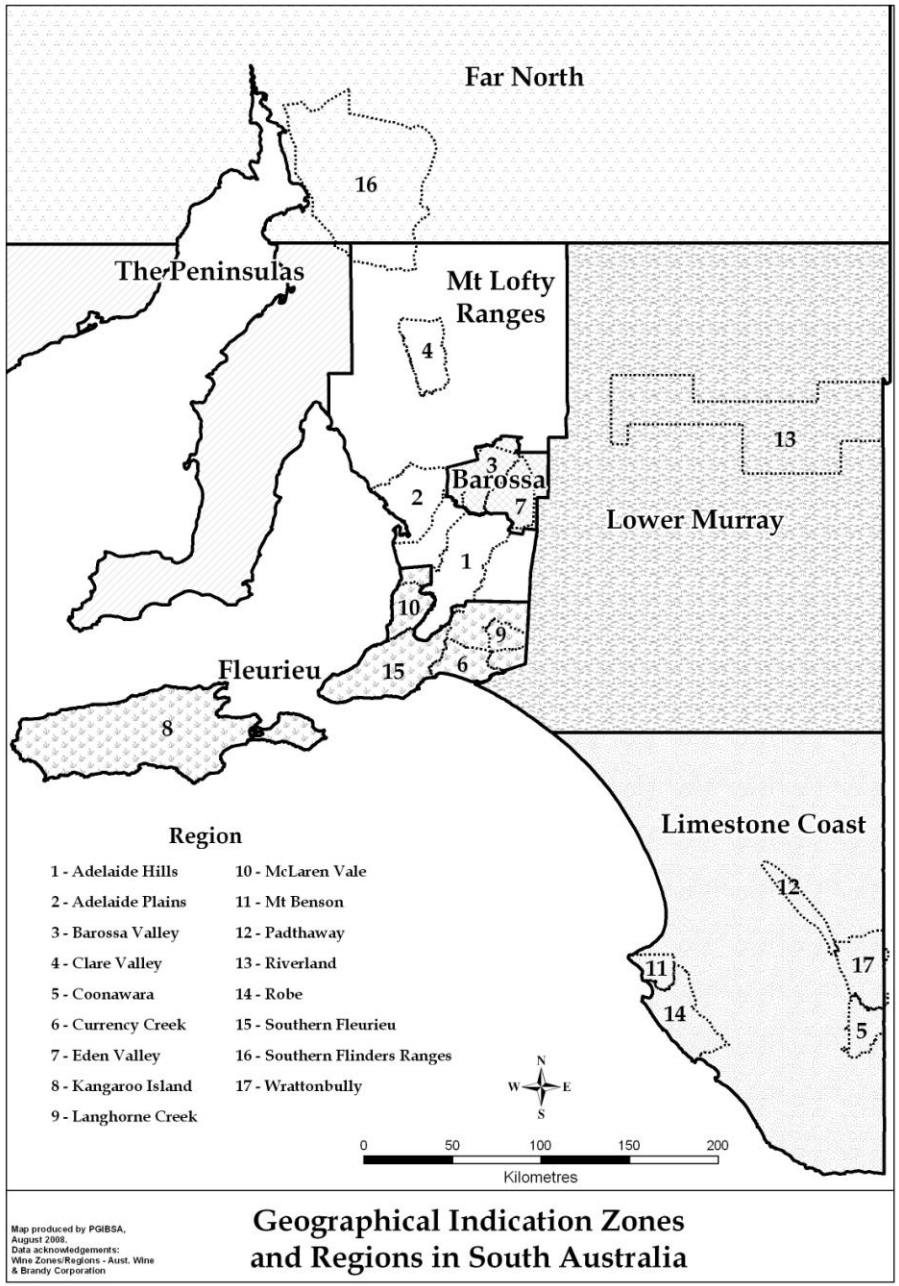


The South Australian Winegrape Utilisation and Pricing Survey

State summary report 2009

State summary

Overview of vintage statistics 2009

State and regional overview

The total crush of South Australian winegrapes in 2009 was 730,904 tonnes. This was 85,000 tonnes (10%) below the 2008 harvest. All regions had a reduced crop compared with 2008 except the Clare Valley and Currency Creek, but all were higher than in 2007 – except McLaren Vale and Eden Valley. Most regions had good winter rains, warm dry conditions during spring and a mild early summer, which set the vines up well; the heat wave in late January – early February varied in its impact depending on the timing relative to veraison, condition of the canopy and water availability in each region. Disease pressure was generally low.

The McLaren Vale harvest was the lowest for at least 10 years, while the Barossa Valley, Langhorne Creek and Adelaide Hills were all down by around 20 – 25%. The Riverland crush was virtually identical to the 2008 crush.

The total estimated purchase value of the crush was $487 million, down by nearly $300 million from last year, and the average purchase value per tonne across the state was down from $936 per tonne to $667 per tonne – one third below the average value ten years ago in 1999 ($999 per tonne). The average purchase values for the major varieties of nearly every region decreased, with Chardonnay falling to a record low in many regions.

Varietal overview

The red crush was 439,705 tonnes; the white crush was 291,199 tonnes. Red varieties were hit harder by the heat in 2009, and this year decreased their share of the crush from 68% in 2008 to 60%. Among the white varieties, Chardonnay accounted for 51% of the production, more than five times its nearest rival (Sauvignon Blanc), while of the reds, Shiraz accounted for 46%, with Cabernet Sauvignon second at 31%. Across all varieties, the proportion of purchased fruit was 72%, compared with 75% in 2008 and 80% in 2007.

Vineyard plantings

Planting data derived from the Phylloxera and Grape Industry Board's vineyard register shows that there were 78,685 hectares planted to vines in South Australia as at 30 April 2009. This represents a net decrease in the total area of around 30 hectares since April 2008. There was a total of 969 hectares (1% of the total area) planted in spring 2008 (including topworking and replants as well as new area). There were nearly twice as many new plantings of red than white varieties, compared with a roughly equal split in 2008. The most planted varieties were Shiraz (355 ha), Sauvignon Blanc (140 ha) and Pinot Gris (73 ha) despite indications that there will be an oversupply of Sauvignon Blanc within five years.

There were a total of 3794 growers registered with the Board as at 30 April 2009. 2231 growers (59%) have properties smaller than 10 hectares and account for 13% of the total vineyard area, while 120 growers (3%) have properties larger than 100 hectares (in the same region) and account for 38% of the vineyard area.

Projections for future supply and demand

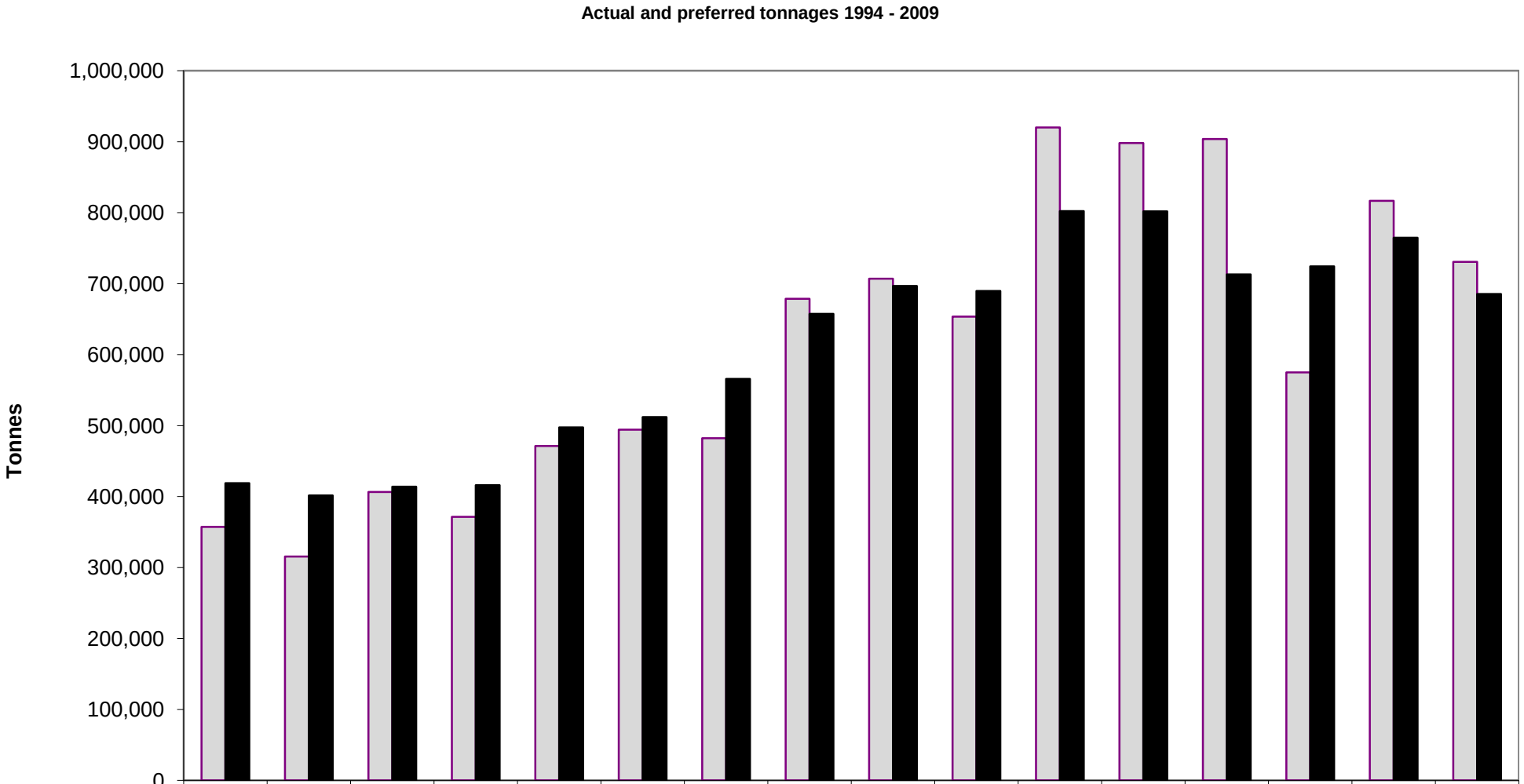
Information on bearing area taken from the ABS vineyard survey is used by the Australian Bureau of Agriculture and Resource Economics (ABARE) to produce projections of future production by variety and region, using long-term historical average yield figures, adjusted where necessary in the short-term by factors such as water availability. These supply projections are included in the survey report, together with the wineries' estimates of future demand and committed intake, which are collected in this survey. The estimated production for 2010 for South Australia is around 797,000 tonnes – similar to the 2008 harvest. Approximately 800,000 tonnes is either winery grown fruit or already contracted; therefore there is not expected to be any surplus fruit next year – although the underlying demand (requirement) is only 708,000 tonnes.

The ABARE estimated supply of grapes for South Australia in 2014 is around 880,000 tonnes. This estimate is based on the assumption of a return to "normal" growing conditions and does not take into account any residual effects of drought and water restrictions or industry restructuring initiatives. This would result in an oversupply of nearly 120,000 tonnes, as winery demand for 2014 as reported in the survey is only 760,000 tonnes. (NB This figure is 100,000 tonnes less than the demand figure for 2013 reported in last year's survey – showing the effects of the downturn in the global economy.) Considering that the state produced close to 1 million tonnes in 2006, it is possible that the production potential in five years' time could exceed 1 million tonnes – depending on seasonal conditions and removals that occur in the next few years – which would further exacerbate the oversupply situation.

All major white varieties except Pinot Gris are likely to be in surplus by 2014 – including Chardonnay (29% surplus) and Sauvignon Blanc (18%). Among the red varieties, small surpluses are expected in most varieties except Cabernet Sauvignon, but for Pinot Noir there is an expected shortfall of 7,600 tonnes – or 40% of the estimated supply.

State summary

Historical production chart 1994 - 2009

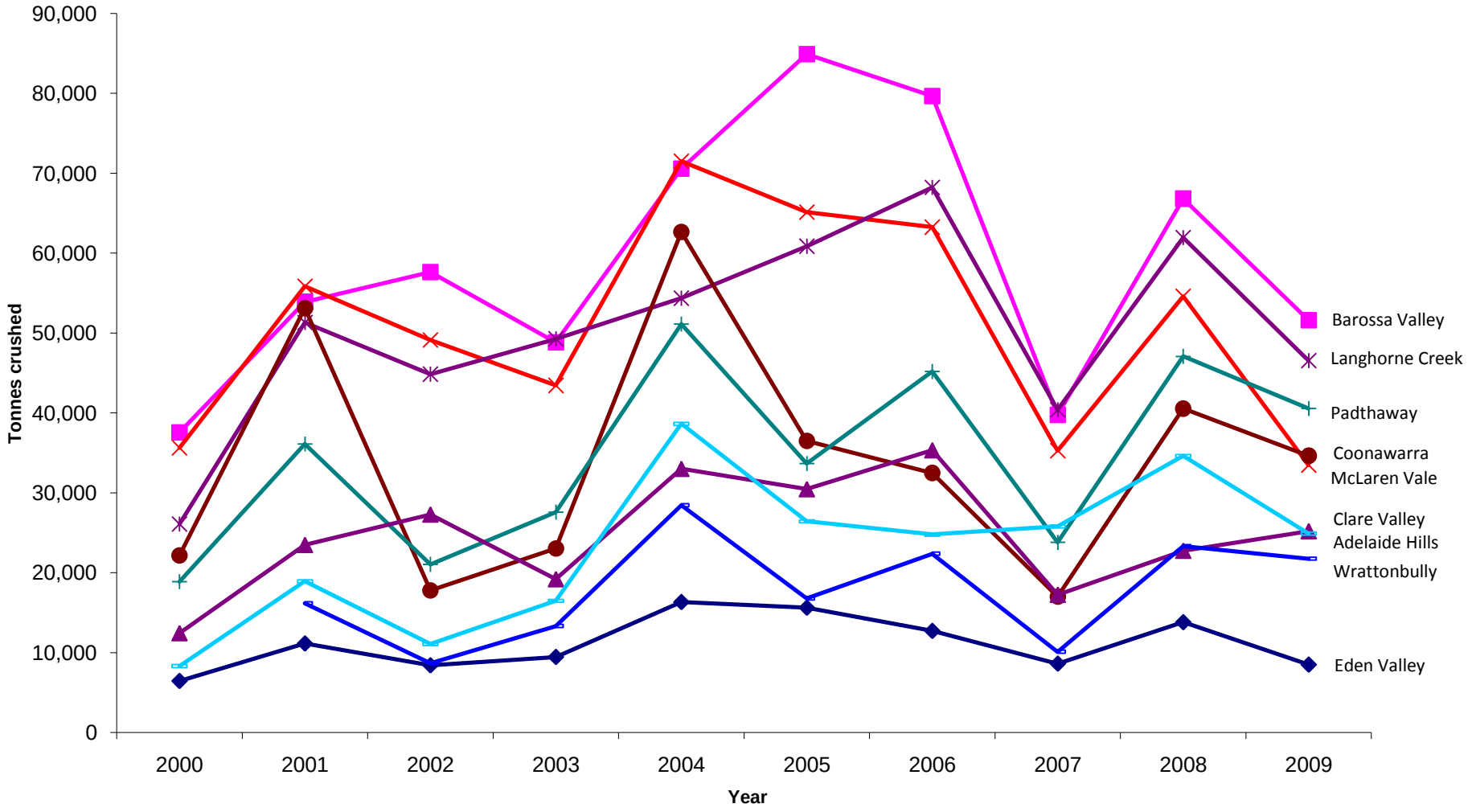


	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Actual usage	357217	315482	406387	371533	471313	494205	482157	678821	707151	653535	920194	898165	904022	575111	816868	730904
Preferred usage	418983	401665	414101	416162	497349	511863	565750	657414	696920	689556	802236	801890	713096	724361	764587	685345

State summary

Vintage by region 2000 - 2009

Not including the Riverland



State summary

Total crush by GI region 2009 vs 2008

GI region	*Winery grown (tonnes)*	*Purchased (tonnes)*	*Total crushed 2009*	*% of state crush*	*Total crush 2008*	*% difference 2009 vs 2008*
Adelaide Hills	5658	19242	24900	*3%*	34618	*-28%*
Adelaide Plains	308	3412	3720	*1%*	6492	*-43%*
Barossa Valley	9776	41825	48089	*7%*	62191	*-23%*
Barossa Zone other	0	3511	3511	*0%*	4625	*-24%*
Clare Valley	10949	14267	25216	*3%*	22765	*11%*
Coonawarra	20518	14134	34652	*5%*	40552	*-15%*
Currency Creek	6244	5638	11881	*2%*	7228	*64%*
Eden Valley	3306	5180	8486	*1%*	13797	*-38%*
Fleurieu zone - other	216	2409	2625	*0%*	4538	*-42%*
Kangaroo Island	114	32	146	*0%*	261	*-44%*
Langhorne Creek	11686	34868	46554	*6%*	61944	*-25%*
Limestone Coast zone - other	9894	5616	15510	*2%*	18107	*-14%*
Lower Murray zone - other	0	1413	1413	*0%*	1419	*0%*
McLaren Vale	13641	19843	33484	*5%*	54602	*-39%*
Mount Benson	1099	2598	3697	*1%*	3423	*8%*
Mount Lofty Ranges zone - other	72	782	855	*0%*	1664	*-49%*
Padthaway	21804	18747	40552	*6%*	47087	*-14%*
Riverland	56728	341125	397853	*54%*	401300	*-1%*
Robe	2334	1642	3977	*1%*	3380	*18%*
Southern Fleurieu	276	891	1167	*0%*	2663	*-56%*
Southern Flinders Ranges	31	710	740	*0%*	834	*-11%*
The Peninsulas	16	105	121	*0%*	35	*246%*
Wrattonbully	9755	12001	21756	*3%*	23342	*-7%*
Total all regions	**184425**	**549991**	**730905**	***100%***	**816868**	***-11%***

State summary

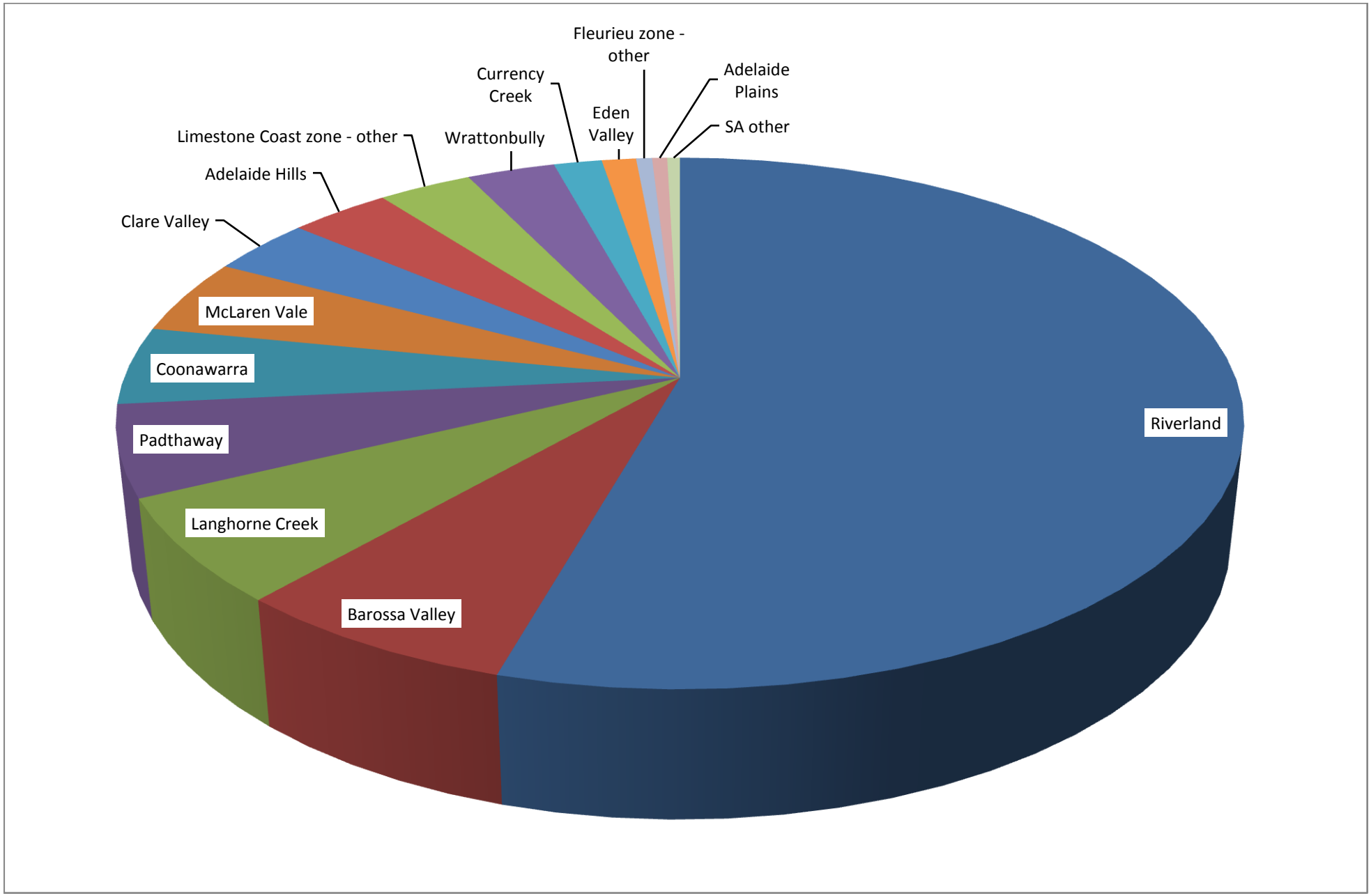
Vintage summary by region 2009

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Adelaide Hills	Red	1,220	6,116	7,336	$8,029,940	$9,753,518
	White	4,437	13,127	17,564	$16,458,913	$22,080,691
	All	5,658	19,242	24,900	$24,488,853	$31,834,209
Adelaide Plains	Red	150	1,908	2,057	$1,422,770	$1,543,127
	White	159	1,505	1,663	$1,163,368	$1,282,180
	All	308	3,412	3,720	$2,586,138	$2,825,307
Barossa Valley	Red	6,883	31,082	37,965	$41,988,176	$51,143,540
** inc Barossa Zone - other*	White	2,894	10,743	13,636	$7,121,825	$9,064,971
	All	9,776	41,825	51,601	$49,110,000	$60,208,511
Clare Valley	Red	6,869	8,069	14,937	$9,893,510	$18,104,569
	White	4,080	6,198	10,278	$6,550,521	$10,766,966
	All	10,949	14,267	25,216	$16,444,031	$28,871,535
Coonawarra	Red	16,810	12,443	29,253	$13,793,603	$32,119,396
	White	3,708	1,692	5,399	$1,477,590	$4,465,943
	All	20,518	14,134	34,652	$15,271,193	$36,585,340
Currency Creek	Red	4,918	4,191	9,108	$3,790,395	$8,255,504
	White	1,326	1,447	2,773	$1,257,799	$2,411,424
	All	6,244	5,638	11,881	$5,048,195	$10,666,928
Eden Valley	Red	998	2,128	3,126	$3,241,264	$4,610,396
	White	2,308	3,052	5,361	$3,430,860	$6,059,535
	All	3,306	5,180	8,486	$6,672,124	$10,669,932
Fleurieu zone - other	Red	289	1,883	2,172	$1,654,874	$1,925,642
	White	316	1,449	1,765	$1,304,883	$1,602,561
	All	605	3,332	3,937	$2,959,757	$3,528,204

Vintage summary by region 2009

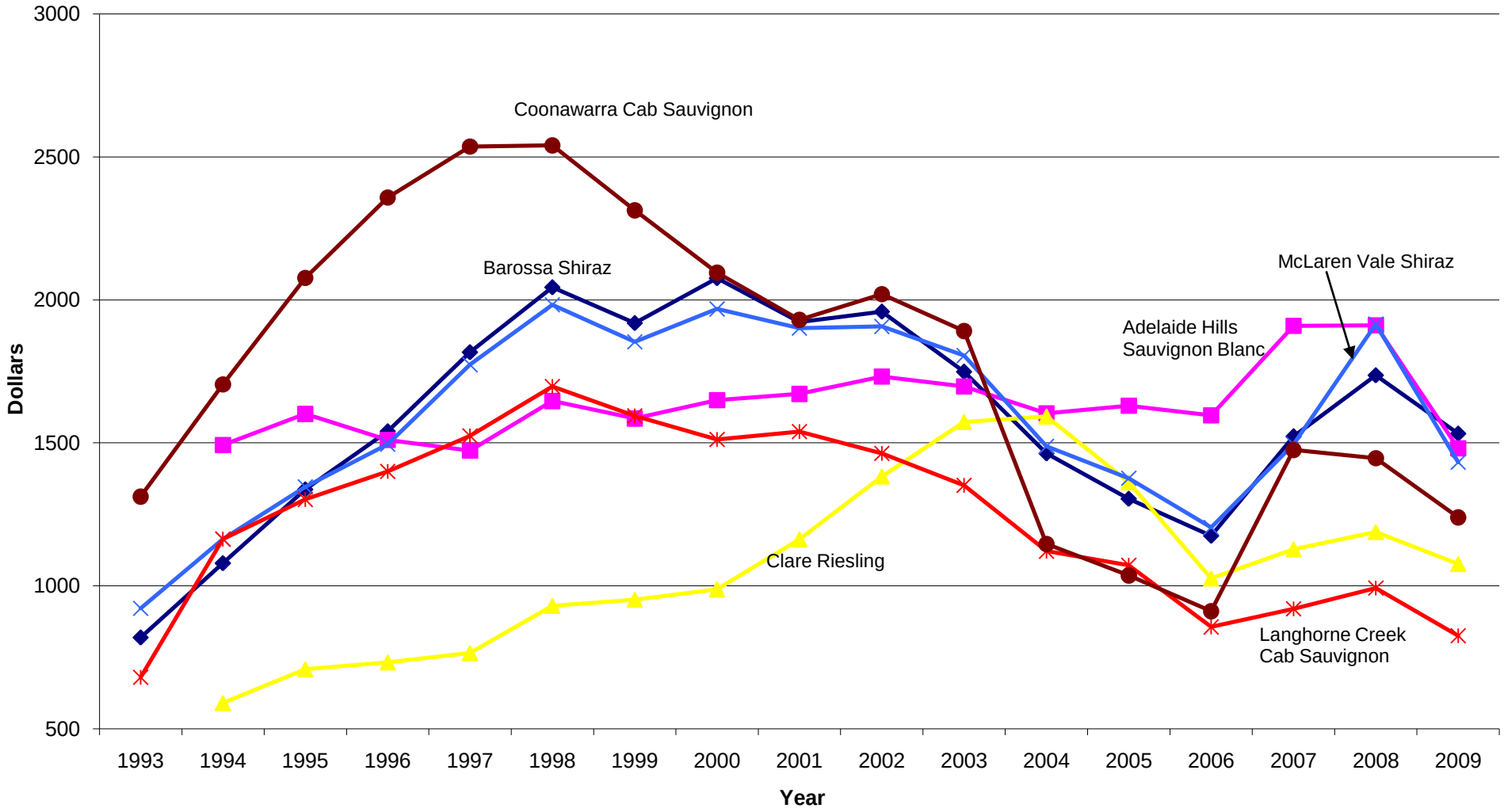
Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Langhorne Creek	Red	9,403	25,853	35,256	$22,188,751	$30,153,585
	White	2,283	9,015	11,299	$5,966,216	$7,529,294
	All	11,686	34,868	46,554	$28,154,966	$37,682,879
Limestone Coast zone - other	Red	10,633	7,354	17,987	$8,190,999	$19,513,558
	White	2,694	2,503	5,196	$2,159,748	$4,311,273
	All	13,327	9,857	23,184	$10,350,747	$23,824,830
McLaren Vale	Red	10,862	16,111	26,974	$20,975,548	$34,858,726
	White	2,779	3,731	6,510	$3,580,839	$6,224,128
	All	13,641	19,843	33,484	$24,556,388	$41,082,854
Padthaway	Red	10,973	10,281	21,253	$10,176,707	$20,352,695
	White	10,832	8,467	19,298	$6,820,510	$15,028,931
	All	21,804	18,747	40,552	$16,997,218	$35,381,625
Riverland	Red	33,252	178,575	211,826	$68,361,639	$80,754,062
	White	23,476	162,550	186,027	$50,825,812	$58,704,794
	All	56,728	341,125	397,853	$119,187,451	$139,458,856
SA - other	Red	102	2,320	2,423	$1,860,470	$1,942,002
	White	16	689	705	$391,161	$401,082
	All	119	3,009	3,128	$2,251,631	$2,343,084
Wrattonbully	Red	7,964	10,069	18,033	$10,639,116	$18,957,029
	White	1,791	1,931	3,723	$1,532,947	$2,819,782
	All	9,755	12,001	21,756	$12,172,063	$21,776,810
All winegrapes		**184,424**	**546,480**	**730,904**	**$336,250,754**	**$486,740,903**

Crush by region pie chart



Historical weighted average prices

Major variety-region combinations

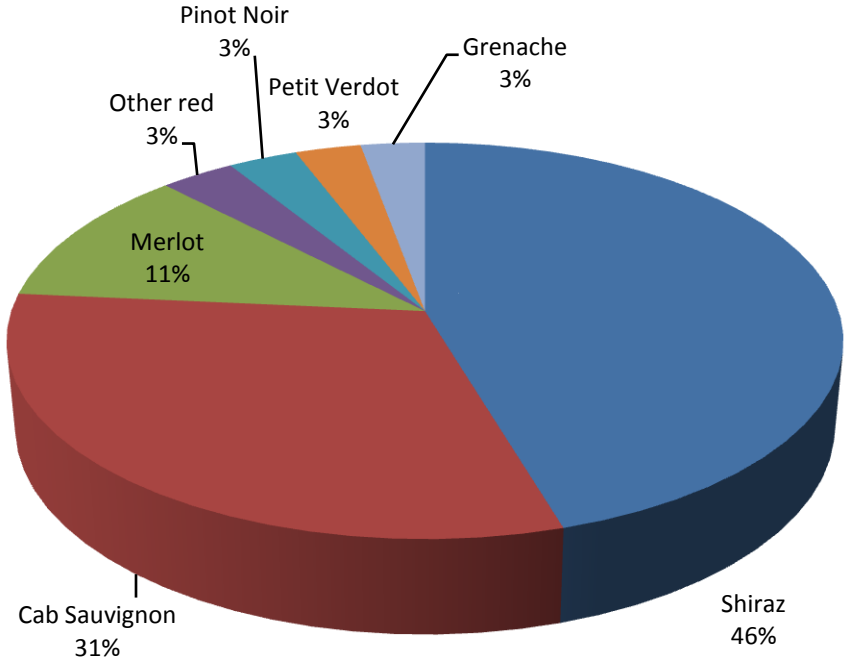


State summary

Vintage summary by variety 2009

Red winegrapes

Variety	*Tonnes purchased*	*Winery grown fruit*	*Total crushed*	*% purchased*	*Est total value of crush*
Red winegrapes					
Barbera	29	49	79	37%	$32,492
Cabernet Franc	431	1,094	1,525	28%	$1,343,420
Cabernet Sauvignon	95,036	41,595	136,631	70%	$96,331,773
Carignan	10	30	40	24%	$43,959
Grenache	9,987	2,605	12,592	79%	$9,372,272
Malbec	558	456	1,014	55%	$735,534
Mataro	3,594	1,043	4,637	78%	$2,479,269
Merlot	30,893	18,874	49,767	62%	$28,936,441
Meunier	225	73	298	75%	$358,678
Nebbiolo	5	38	43	12%	$20,777
Other Red	889	276	1,165	76%	$940,337
Petit Verdot	8,056	4,878	12,934	62%	$4,524,119
Pinot Noir	11,560	2,065	13,625	85%	$11,357,249
Ruby Cabernet	1,939	589	2,528	77%	$784,882
Sangiovese	1,006	787	1,793	56%	$1,598,711
Shiraz	153,051	46,460	199,511	77%	$148,837,658
Tarrango	177	0	177	100%	$58,494
Tempranillo	741	201	943	79%	$961,102
Touriga	95	149	244	39%	$258,317
Zinfandel	98	61	159	62%	$199,874
Total red winegrapes	**318,381**	**121,324**	**439,705**	**72%**	**$309,175,357**

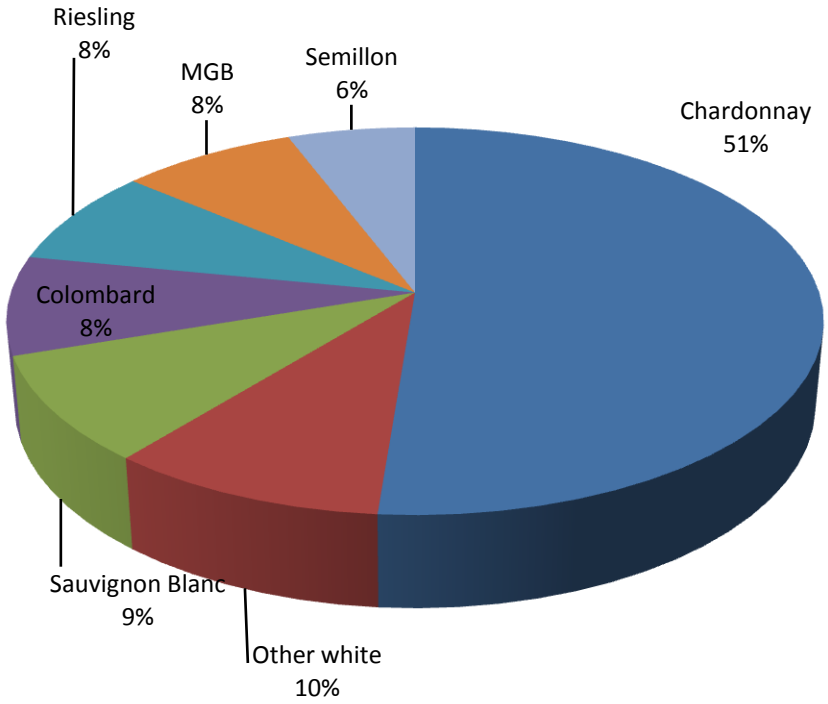


State summary

Vintage summary by variety 2009

White winegrapes

Variety	*Tonnes purchased*	*Winery grown fruit*	*Total crushed*	*% purchased*	*Est total value of crush*
White winegrapes					
Canada Muscat	32	54	86	37%	$55,705
Chardonnay	121,772	27,497	149,269	82%	$58,069,592
Chenin Blanc	2,868	94	2,963	97%	$980,373
Colombard	22,648	1,395	24,043	94%	$6,907,046
Crouchen	29	104	133	22%	$41,248
Doradillo	248	729	976	25%	$217,897
Marsanne	141	65	206	68%	$279,014
Muscadelle	128	80	208	62%	$49,556
Muscat Blanc	2,443	202	2,645	92%	$1,328,797
Muscat Gordo Blanco	22,050	1,386	23,436	94%	$9,166,830
Other White	705	388	1,093	64%	$534,209
Palomino	91	23	114	80%	$41,723
Pedro Ximenes	27	100	127	21%	$74,559
Pinot Gris	4,182	1,713	5,894	71%	$6,422,714
Riesling	13,418	10,026	23,444	57%	$19,370,656
Roussanne	58	29	87	67%	$106,416
Sauvignon Blanc	17,878	8,079	25,956	69%	$25,318,759
Semillon	10,555	6,380	16,935	62%	$8,978,105
Sultana	756	0	756	100%	$197,962
Taminga	85	0	85	100%	$25,245
Traminer	1,617	1,987	3,604	45%	$1,932,902
Trebbiano	85	5	90	94%	$27,731
Verdelho	2,375	1,760	4,134	57%	$2,159,351
Viognier	3,912	1,003	4,915	80%	$4,225,977
Total white winegrapes	**228,099**	**63,099**	**291,199**	**78%**	**$146,512,367**
Total all winegrapes	**546,480**	**184,424**	**730,904**	**75%**	**$455,687,724**



There is an estimated non-response rate of 4% across the state.

Current plantings by variety and year planted

Variety	Current area in hectares					
	Pre-2006	*2006*	*2007*	*2008*	*Total area*	*% planted in 2008*
Red winegrapes						
Alicante Bouschet	13	0	0	2	15	*11%*
Barbera	26	0	1	1	28	*2%*
Cabernet Franc	186	0	1	1	188	*1%*
Cabernet Sauvignon	16824	61	71	87	17043	*1%*
Dolcetto	17	4	0	0	21	*0%*
Durif	28	0	6	4	38	*10%*
Grenache	1841	8	6	12	1867	*1%*
Lagrein	15	2	0	0	18	*0%*
Malbec	239	1	3	2	244	*1%*
Mataro (Mourvedre)	624	12	13	23	671	*3%*
Merlot	4392	47	14	7	4460	*0%*
Meunier (Pinot Meunier)	42	0	0	0	42	*0%*
Nebbiolo	49	0	3	1	53	*2%*
Other red	142	5	8	16	171	*9%*
Petit Verdot	854	1	0	0	856	*0%*
Pinot Noir	1417	24	41	77	1560	*5%*
Ruby Cabernet	284	0	0	0	284	*0%*
Sangiovese	212	1	2	6	221	*3%*
Shiraz	24479	404	403	355	25642	*1%*
Tempranillo	153	6	10	24	193	*12%*
Zinfandel	39	0	1	0	40	*0%*
Total red winegrapes	**51878**	**578**	**581**	**618**	**53655**	***1%***

Current plantings by variety and year planted

Variety	*Pre-2006*	*2006*	*2007*	*2008*	*Total area*	*% planted in 2008*
White winegrapes						
Albarino	6	7	19	31	62	*49%*
Chardonnay	10927	116	62	13	11119	*0%*
Chenin Blanc	179	0	0	4	184	*2%*
Colombard	916	15	0	1	932	*0%*
Cygne Blanc	22	4	0	0	26	*0%*
Doradillo	120	0	0	0	120	*0%*
Marsanne	24	3	0	2	29	*8%*
Muscadelle (Tokay)	40	0	0	0	40	*0%*
Muscat Blanc (Frontignac)	147	34	6	14	202	*7%*
Muscat Gordo Blanco	1057	90	26	26	1200	*2%*
Other white	81	5	2	8	96	*8%*
Palomino	40	0	0	0	40	*0%*
Pedro Ximenes	35	0	0	0	36	*1%*
Pinot Gris	373	296	123	73	865	*8%*
Riesling	3241	43	30	16	3330	*0%*
Roussanne	17	2	1	2	21	*10%*
Sauvignon Blanc	1970	227	237	140	2574	*5%*
Semillon	1576	15	15	1	1607	*0%*
Sultana	303	1	0	2	305	*1%*
Traminer	257	9	0	1	267	*1%*
Trebbiano	29	0	0	0	29	*0%*
Verdelho	284	8	0	1	293	*0%*
Vermantino	3	2	0	7	11	*59%*
Viognier	505	45	46	7	602	*1%*
Total white winegrapes	**22152**	**922**	**568**	**350**	**23992**	***1%***
Unknown variety	792	0	0	0	792	*0%*
Other grape varieties						
Multi-purpose	116	11	0	0	127	*0%*
Rootstock block	47	0	0	0	48	*0%*
Tablegrapes - red	45	0	0	1	46	*2%*
Tablegrapes - white	24	0	0	0	24	*0%*
Total all varieties	**75055**	**1511**	**1150**	**969**	**78685**	***1%***

State summary

Current plantings by region and year planted

		Current area in hectares						
Zone	**Region**	*Pre-2006*	*2006*	*2007*	*2008*	*Total area*	*% planted in 2008*	*% of state plantings*
Barossa	Barossa Valley	10432	244	318	257	11251	*2%*	*14%*
	Eden Valley	2203	23	26	17	2269	*1%*	*3%*
	Barossa Zone - Other	106	0	0	0	106	*0%*	*0%*
	Total for Barossa	**12741**	**267**	**344**	**274**	**13626**	***2%***	***17%***
Fleurieu	Currency Creek	921	25	4	0	950	*0%*	*1%*
	Kangaroo Island	138	0	4	2	145	*1%*	*0%*
	Langhorne Creek	6059	118	10	27	6214	*0%*	*8%*
	Mclaren Vale	7103	107	79	100	7390	*1%*	*9%*
	Southern Fleurieu	500	32	12	5	550	*1%*	*1%*
	Fleurieu Zone - Other	171	0	30	0	201	*0%*	*0%*
	Total for Fleurieu	**14892**	**283**	**140**	**135**	**15450**	***1%***	***20%***
Limestone Coast	Bordertown	1260	14	0	0	1274	*0%*	*2%*
	Coonawarra	5678	10	36	10	5734	*0%*	*7%*
	Mount Benson	507	13	12	20	553	*4%*	*1%*
	Padthaway	4001	94	20	36	4151	*1%*	*5%*
	Robe	706	35	0	0	741	*0%*	*1%*
	Wrattonbully	2524	126	12	14	2675	*1%*	*3%*
	Limestone Coast Zone - Other	800	1	37	10	847	*1%*	*1%*
	Total for Limestone Coast	**15475**	**294**	**116**	**90**	**15975**	***1%***	***20%***
Lower Murray	Riverland	21172	433	322	230	22156	*1%*	*28%*
	Lower Murray Zone - Other	445	7	12	0	464	*0%*	*1%*
	Total for Lower Murray	**21617**	**440**	**333**	**230**	**22620**	***1%***	***29%***
Mount Lofty Ranges	Adelaide Hills	3621	135	119	144	4020	*4%*	*5%*
	Adelaide Plains	713	16	2	13	744	*2%*	*1%*
	Clare Valley	5440	71	93	83	5687	*1%*	*7%*
	Mount Lofty Ranges Zone - Other	355	6	1	1	363	*0%*	*0%*
	Total for Mount Lofty Ranges	**10129**	**228**	**216**	**241**	**10814**	***2%***	***14%***
Far North	Southern Flinders Ranges	166	0	0	0	166	*0%*	*0%*
The Peninsulas		33	0	1	0	34	*0%*	*0%*
	Total for All GIs	**75055**	**1511**	**1150**	**969**	**78685**	***1%***	***100%***

State summary

Number of growers by region and property size 2009

	Property size in hectares											
	< 10 ha		*10 - 24 ha*		*25 - 49 ha*		*50 - 99 ha*		*100+ ha*		***Total***	
GI region	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*
Barossa												
Barossa Valley	1468	345	2512	158	2394	73	1610	24	3266	12	11251	612
Barossa Zone - Other	8	3	14	1	0	0	84	1	0	0	106	5
Eden Valley	379	89	455	30	326	10	544	7	565	2	2269	138
Fleurieu												
Currency Creek	59	12	162	11	192	5	0	0	537	2	950	30
Kangaroo Island	111	19	34	3	0	0	0	0	0	0	145	22
Langhorne Creek	110	21	422	25	868	25	1246	17	3567	14	6214	102
McLaren Vale	1473	348	1632	102	1474	45	1436	21	1375	6	7390	522
Southern Fleurieu	118	37	101	8	263	7	68	1	0	0	550	53
Fleurieu Zone - Other	26	9	43	3	39	1	93	1	0	0	201	14
Limestone Coast												
Coonawarra	289	55	518	34	573	17	1087	16	3266	11	5734	133
Mount Benson	40	6	65	4	201	6	118	2	129	1	553	19
Padthaway	11	2	48	4	273	8	524	7	3294	9	4151	30
Robe	8	1	65	4	81	2	54	1	533	3	741	11
Wrattonbully	63	11	380	22	401	11	430	6	1400	6	2675	56
Limestone Coast Zone - Other*	127	31	56	4	166	5	297	4	1475	6	2121	50
Lower Murray												
Riverland	3749	745	5140	337	3235	96	2065	29	7968	35	22156	1242
Lower Murray Zone - Other	68	16	150	9	246	8	0	0	0	0	464	33
Mount Lofty Ranges												
Adelaide Hills	790	204	1124	65	1092	32	891	13	123	1	4020	315
Adelaide Plains	166	51	147	11	133	3	122	2	175	1	744	68
Clare Valley	746	182	927	56	684	20	759	11	2571	11	5687	280
Mount Lofty Ranges Zone - Other	93	30	38	2	139	4	92	1	0	0	363	37
Southern Flinders Ranges	42	10	92	5	32	1	0	0	0	0	166	16
The Peninsulas	13	4	21	2	0	0	0	0	0	0	34	6
Grand Total	**9957**	**2231**	**14147**	**900**	**12816**	**379**	**11519**	**164**	**30246**	**120**	**78685**	**3794**

**inc Bordertown*

State summary

Estimated supply and committed intake 2010 - 2014 (cool climate regions outside the Riverland)

Variety	2010 Est Supply [1]	2010 Committed intake[2] Winery grapes	2010 Committed intake[2] Contract purchases	2010 Committed intake[2] Total committed intake	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
Red winegrapes												
Barbera	191	115	0	115	221	115	0	115	282	115	0	115
Cabernet Franc	1,379	1,103	333	1,435	1,442	1,103	188	1,291	1,525	1,013	135	1,148
Cabernet Sauvignon	88,646	46,879	48,250	95,129	92,594	47,855	27,165	75,019	92,973	45,913	15,430	61,342
Grenache	10,105	3,295	5,531	8,826	10,915	3,409	4,463	7,872	10,944	3,404	2,647	6,050
Malbec	1,137	870	517	1,387	1,152	878	478	1,356	1,170	878	445	1,323
Mataro	1,992	1,329	786	2,115	2,083	1,407	751	2,158	2,183	1,438	592	2,030
Merlot	23,936	14,565	13,667	28,232	26,154	14,616	8,976	23,592	26,154	14,030	5,548	19,578
Meunier	457	106	103	210	457	106	97	203	457	106	35	141
Nebbiolo	248	180	67	247	266	224	59	283	285	225	0	225
Other Red	1,120	193	529	722	1,209	204	443	647	1,373	225	430	668
Petit Verdot	2,777	1,341	592	1,933	2,787	1,373	315	1,688	2,787	1,405	128	1,534
Pinot Noir	9,933	3,587	6,041	9,628	10,877	3,740	3,299	7,038	10,950	3,622	1,909	5,531
Ruby Cabernet	545	11	53	63	547	11	53	63	547	11	53	63
Sangiovese	1,643	505	653	1,159	1,670	530	477	1,007	1,679	535	197	732
Shiraz	138,872	47,432	76,717	124,149	146,636	48,818	54,111	102,929	150,882	47,992	37,534	85,526
Tempranillo	611	274	448	722	679	312	490	802	805	334	491	825
Touriga	125	44	35	79	126	73	29	102	126	73	29	102
Zinfandel	208	65	48	113	235	70	28	98	251	70	28	98
Total red winegrapes	**283,994**	**121,894**	**154,368**	**276,262**	**300,123**	**124,839**	**101,423**	**226,262**	**305,444**	**121,388**	**65,644**	**187,032**

[1] *Supply forecast produced by ABARE based on the ABS Vineyard Survey 2008 - with some adjustments by PGIBSA (see individual regions)*

[2] *A raising factor of 1.05 has been applied to committed intake to allow for non-respondents*

State summary

Estimated supply and committed intake 2010 - 2014 (cool climate regions outside the Riverland)

Variety	2010 Est Supply [1]	2010 Committed intake[2] Winery grapes	2010 Committed intake[2] Contract purchases	2010 Committed intake[2] Total committed intake	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
White winegrapes												
Chardonnay	57,351	22,640	31,531	54,171	62,237	23,847	19,551	43,398	62,638	21,311	11,263	32,574
Chenin Blanc	763	92	334	425	792	92	299	391	792	92	212	303
Colombard	936	147	163	311	1,006	147	126	274	1,006	147	126	274
Marsanne	400	99	138	237	409	99	113	212	421	99	113	212
Muscadelle	279	37	11	47	280	37	11	47	280	37	11	47
Muscat Blanc	550	247	164	412	562	332	147	479	583	411	147	558
Muscat Gordo Blanco	392	20	204	224	392	31	234	264	392	31	242	273
Other White	954	83	125	208	1,226	157	197	354	1,677	157	188	345
Palomino	99	126	22	148	100	126	14	140	100	126	0	126
Pedro Ximenes	0	91	5	96	0	104	5	110	0	104	5	110
Pinot Gris	4,232	2,845	4,109	6,954	6,002	3,313	3,832	7,144	6,645	3,365	3,375	6,740
Riesling	21,533	12,413	11,386	23,799	23,164	12,802	7,526	20,329	23,524	12,842	5,724	18,566
Roussanne	168	64	88	153	178	64	96	160	197	64	96	160
Sauvignon Blanc	17,369	6,329	10,404	16,734	20,872	6,750	8,377	15,127	23,067	6,731	6,298	13,029
Semillon	15,358	2,607	7,143	9,749	13,341	2,550	4,928	7,478	13,479	2,584	3,872	6,456
Traminer	1,254	810	703	1,513	1,257	826	505	1,331	1,266	845	177	1,021
Trebbiano	119	5	0	5	119	5	0	5	119	5	0	5
Verdelho	1,592	684	780	1,464	1,620	679	539	1,218	1,620	700	287	987
Viognier	2,648	816	2,286	3,101	2,761	839	2,054	2,893	2,844	839	1,921	2,760
Total white winegrapes	**126,104**	**50,156**	**69,596**	**119,752**	**136,445**	**52,799**	**48,554**	**101,353**	**140,814**	**50,490**	**34,057**	**84,547**
Total all winegrapes	**410,099**	**172,050**	**223,964**	**396,015**	**436,568**	**177,638**	**149,977**	**327,615**	**446,258**	**171,877**	**99,701**	**271,578**

[1] *Supply forecast produced by ABARE based on the ABS Vineyard Survey 2008 - with some adjustments by PGIBSA (see individual regions)*

[2] *A raising factor of 1.05 has been applied to committed intake to allow for non-respondents*

State summary

Supply and demand for grapes in South Australia 2010 - 2014

Variety	*Year*	*Est Supply* [1]	*Winery grown grapes* [2]	*Contract purchases* [2]	*Total committed intake* [3]	*Total requirement (Demand)*	*Net surplus/ shortfall* [4,5]	*Fruit available on the open market* [6]
White winegrapes								
Chardonnay	2010	147,744	31,834	124,540	156,374	106,829	0	0
	2012	164,569	36,204	104,267	140,471	115,997	24,098	24,098
	2014	166,508	33,695	82,047	115,742	118,287	48,220	50,765
Pinot Gris	2010	4,460	2,893	4,628	7,521	8,783	-4,323	0
	2012	7,154	3,393	4,535	7,928	8,973	-1,819	0
	2014	8,686	3,445	4,066	7,511	9,058	-372	1,175
Riesling	2010	24,462	13,021	14,033	27,054	17,140	0	0
	2012	27,020	13,480	10,249	23,729	18,069	3,292	3,292
	2014	27,381	13,519	8,362	21,881	18,336	5,500	5,500
Sauvignon Blanc	2010	24,898	8,798	20,665	29,463	29,107	-4,209	0
	2012	32,280	9,074	19,973	29,047	30,487	1,793	3,233
	2014	37,863	9,056	16,952	26,007	31,034	6,829	11,855
Semillon	2010	26,177	7,506	11,814	19,320	15,163	6,857	6,857
	2012	25,484	7,108	8,574	15,682	16,113	9,371	9,802
	2014	26,000	7,141	6,245	13,386	16,413	9,586	12,614
All other white varieties	2010	64,297	11,285	69,301	80,586	67,206	-2,909	0
	2012	77,896	12,106	66,209	78,316	68,950	0	0
	2014	80,368	12,058	56,248	68,306	69,795	10,573	12,062
Total white winegrapes	**2010**	**292,038**	**75,338**	**244,980**	**320,318**	**244,226**	**0**	**0**
	2012	**334,403**	**81,365**	**213,807**	**295,172**	**258,589**	**39,231**	**39,231**
	2014	**346,804**	**78,913**	**173,920**	**252,833**	**262,924**	**83,880**	**93,971**

Notes

[1] *Supply projections provided by ABARE (see Explanations and Definitions)*

[2] *A raising factor of 1.032 has been applied to allow for non-respondents*

[3] *Sum of winery grown and contract purchases*

[4] *If supply is greater than committed intake, the difference between supply and either committed intake or demand - whichever is higher.*

[5] *If committed intake is greater than supply AND supply is greater than demand then the surplus/shortfall is recorded as zero.*

[6] *If estimated supply is less than committed intake then available supply is recorded as zero.*

State summary

Supply and demand for grapes in South Australia 2010 - 2014

Variety	*Year*	*Est Supply* [1]	*Winery grown grapes* [2]	*Contract purchases* [2]	*Total committed intake* [3]	*Total requirement (Demand)*	*Net surplus/ shortfall* [4,5]	*Fruit available on the open market* [6]
Red winegrapes								
Cabernet Sauvignon	2010	150,037	54,557	98,428	152,986	155,113	-5,076	0
	2012	153,096	56,023	74,696	130,719	162,852	-9,757	22,376
	2014	153,744	54,565	58,676	113,242	163,778	-10,034	40,502
Grenache	2010	16,534	3,897	9,289	13,186	11,914	3,347	3,347
	2012	17,964	4,009	7,317	11,326	12,522	5,442	6,639
	2014	18,136	3,978	5,224	9,202	12,676	5,460	8,935
Merlot	2010	47,359	21,112	29,129	50,241	46,737	0	0
	2012	49,762	21,265	22,794	44,060	47,907	1,855	5,703
	2014	50,130	20,692	17,256	37,948	49,542	588	12,182
Pinot Noir	2010	15,537	3,786	12,257	16,043	22,830	-7,293	0
	2012	17,560	3,935	9,196	13,132	25,251	-7,690	4,428
	2014	18,617	3,820	7,170	10,990	26,306	-7,690	7,627
Shiraz	2010	237,039	60,232	160,348	220,581	210,434	16,458	16,458
	2012	247,498	62,020	127,784	189,804	222,911	24,587	57,694
	2014	253,099	61,532	100,975	162,507	227,412	25,687	90,591
All other red varieties	2010	38,832	12,570	16,719	29,289	17,247	9,544	9,544
	2012	38,406	12,798	13,314	26,112	17,682	12,294	12,294
	2014	39,162	12,884	10,299	23,184	18,108	15,978	15,978
Total red winegrapes	**2010**	**505,337**	**156,154**	**326,170**	**482,325**	**464,276**	**23,013**	**23,013**
	2012	**524,287**	**160,050**	**255,102**	**415,152**	**489,126**	**35,161**	**109,134**
	2014	**532,887**	**157,473**	**199,600**	**357,073**	**497,822**	**35,065**	**175,815**
Total all winegrapes	**2010**	**797,375**	**231,493**	**571,150**	**802,643**	**708,502**	**0**	**0**
	2012	**858,690**	**241,415**	**468,909**	**710,324**	**747,715**	**110,975**	**148,366**
	2014	**879,692**	**236,386**	**373,520**	**609,906**	**760,746**	**118,946**	**269,786**

Notes

[1] *Supply projections provided by ABARE (see Explanations and Definitions)*

[2] *A raising factor of 1.032 has been applied to allow for non-respondents*

[3] *Sum of winery grown and contract purchases*

[4] *If supply is greater than committed intake, the difference between supply and either committed intake or demand - whichever is higher.*

[5] *If committed intake is greater than supply AND supply is greater than demand then the surplus/shortfall is recorded as zero.*

[6] *If estimated supply is less than committed intake then available supply is recorded as zero.*