Table of contents

TONNAGE DATA

Definition of regions

Regions have been defined in accordance with declared or interim Geographical Indication (GI) boundaries. Where a GI region has not been declared, or is too small to be reported separately, then the relevant GI zone is used. This year **SA - other** has been dropped from the regional report section as it is not a meaningful category - containing a mixture of "rest of zones" and small GI regions (Far North, Peninsulas)**.** Further disaggregation of data into smaller regions such as Currency Creek and Mount Benson is available on request from the Board's office (NB this does not include any crop value data for confidentiality reasons). The full list of regions for which information is available can be found in table 1.4 (page 10).

Total and preferred crush

The **total crushed** is the total tonnes of grapes crushed from a particular source region, whether processed in that region or not.

The **total preferred** is the tonnage that wineries would prefer to have received this vintage.

Percentage of demand supplied is the total tonnes crushed divided by the total preferred expressed as a percentage. A value of 100% means that supply and demand were equal. A value greater than 100% means that there was an oversupply, while a value less than 100% means that wineries would have bought more if available – provided quality or other parameters were met.

Winery owned and independent grower owned vineyards

"Winery" refers to all wine companies, individuals etc who produce wine or juice for their own use or sale. Reported fruit is separated into fruit produced from the winery's own vineyards (own grown) and from independent grower owned vineyards (purchased). The proportion of purchased fruit is given as a percentage of the total.

CROP VALUE DATA

Total purchase value

The total purchase value is defined as the total amount paid for fruit of a particular variety at the point of receival – NOT including any amount added for freight. It includes any penalties or bonuses (eg baumé) paid 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** (formerly called the "weighted average weighbridge price") is calculated as the total amount paid for all grapes purchased of a particular variety (summed across all wineries) divided by the total tonnes purchased of that variety *for which pricing data has been supplied.* Winery grown grapes are not included in the calculation of average purchase value. *Note: in small varieties there may sometimes be only one winery contributing towards a calculated average purchase value per tonne.*

Reliability of price reporting

Not all wineries report pricing data. The figure in brackets after the calculated average purchase value is the percentage of the total tonnes purchased for which pricing data was provided.

There is also 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. There can be a significant difference between the price at receival (reported in this survey) and the final price paid to individual growers. *Therefore the reported average purchase value per tonne should not be interpreted as a total district average price.*

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.*

Baumé

Baumé reporting has been dropped from this year's survey, in accordance with industry feedback received that it is not a broadly useful measure of quality or price movements.

PROJECTIONS OF FUTURE INTAKE

Estimated and preferred

The estimated tonnage is the total tonnes that wineries expect to crush in each of the forecast years - ie the estimated supply of fruit. This includes winery grown and purchased fruit.

The preferred tonnage is the tonnage required by wineries to achieve sales forecasts - ie the estimated demand for winegrapes.

Where the preferred tonnage is higher than the estimated, a shortfall in supply is indicated. However, this does not necessarily mean a general demand for any fruit of that variety; it may have to meet particular specifications.

The projections are provided as at June 2003, and are subject to variation over time, with changes in market requirements, changes in the supply situation and individual variables. It should be noted that there is considerable variation from one survey to the next in projections for the same future forecast year.

The projections should be interpreted and used cautiously and should not be relied upon in making decisions about future production.

Reliability of forecasts

Not all wineries provide estimates of future intakes - particularly for the later forecast years. This year the convention has been adopted of "flat-lining" forecasts - ie continuing the same estimates of future supply and demand that are provided for earlier years, where later years have been left blank.

However, where no forecasts have been provided, then no assumptions have been made in the report. A reliability measure for each forecast based on the number of wineries providing a forecast is given after each figure. A reliability of 100% means that all wineries that grew or purchased the variety in the current vintage provided estimates of the tonnages they require in future vintages. A reliability of 50% means that only some wineries provided forecasts, and these wineries accounted for 50% of the tonnes for each variety grown or purchased in the current vintage.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2003 Australian Regional 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 record current plantings, by year planted. Information is current as at April 2003 and includes all plantings up to the 2002 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, only the new variety appears in the database. This explains why the area planted for a given year may be different in the 2003 report compared with previous reports.

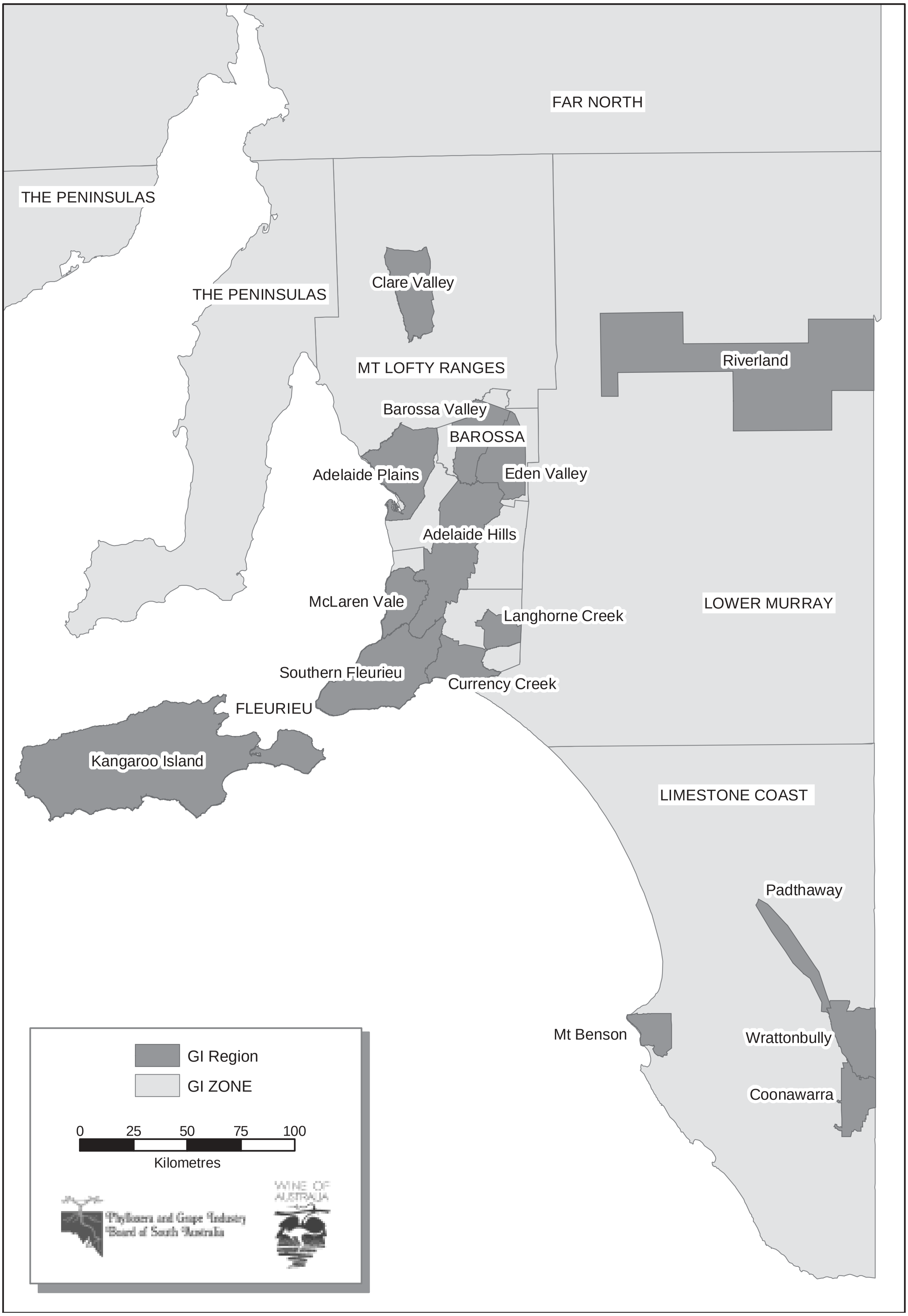
2. Vineyard plantings are recorded in the database by Geographical Indication. In the State summary section, total plantings for all GI regions are given separately. However, in the regional reports section, planting details by variety are only given where regions meet the criteria for separate reporting (see previous page). Planting details for smaller regions are available on request from the Board.

3. Where a 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.

4. Minor anomalies in the record-keeping system account for slight variations in the total area reported for the state in different tables.

GEOGRAPHICAL INDICATION (GI) REGIONS AND ZONES IN SA

GI REGIONS AND ZONES IN SOUTH AUSTRALIA



State summary

OVERVIEW OF VINTAGE STATISTICS 2003

State and regional overview

The total crush of South Australian winegrapes in 2003 was 653,535 tonnes. This compares with 707,151 tonnes in 2002 – a decrease of just over 50,000 tonnes, or 7.5% *(table 1.1).*

The vintage saw an overall drop in production in the Barossa Valley, Clare and McLaren Vale to below 2002 and 2001 production levels - despite increases in bearing area. Coonawarra, Padthaway and the Adelaide Hills saw increases above the very low 2002 production levels. Langhorne Creek also had an increase in production, and in 2003 was the second largest producing region after the Riverland - producing more than the Barossa Valley or McLaren Vale, and nearly double what it produced in 2000 *(figure 1.1).*

Varietal overview

The red crush was 439,074 tonnes; the white crush was 214,460 tonnes. Red varieties accounted for 68% of the crush – slightly more than last year. In the major red varieties there were slight surpluses in Cabernet Sauvignon, Pinot Noir and Petit Verdot, and a substantial (more than 50%) surplus in Ruby Cabernet. There were slight shortfalls in Shiraz, Merlot and Grenache; overall supply and demand of reds were almost exactly in balance *(table 1.2)*. Shiraz accounted for 42% of the red crush, Cabernet Sauvignon for 31% and Merlot was a poor third at 9% *(figure 1.2).*

There was an overall 13% shortfall in the white varieties - made up almost entirely of Chardonnay, Colombard, Sauvignon Blanc and the neutrals Muscat Gordo Blanco and Sultana *(table 1.3)*. Chardonnay accounted for 44% of the white crush, with Muscat Gordo Blanco second (12%) and Colombard third (11%). Chardonnay increased its share from 41% in 2002 *(figure 1.3)*.

The total estimated purchase value of the crush at point of receival was $632 million *(table 1.5)*. This compares with a total estimated value of $702 million in 2002. The decrease is attributable to the reduced total production, and to a reduced average purchase value per tonne. This decreased from $940 in 2002 to $907 per tonne in 2003. The decrease may be attributable to lower prices paid on average for fruit at point of receival, and/or to a change in the proportions of fruit from different regions and different varieties.

Source of fruit

Winery grown fruit accounted for 23% of the crush overall in 2003, compared with 21% in 2002, and 31% in 2001. There is considerable variation in this proportion between regions, with Padthaway having the largest percentage of winery owned fruit (65%) and the Adelaide Plains having the smallest (6%) *(table 1.4).* The percentage of winery grown fruit is projected to increase slightly to around 25% of the crush over the five year forecast period. (Forecasts by source of fruit are not presented in the report but are available on request from the Board's office.)

Projections of future supply and demand

Projected production for red varieties over the five year forecast period is expected to stabilise at around 570,000 tonnes, with a surplus in the first three years, and a 30,000 tonne (5%) shortfall by 2008 *(table 1.9)*. There has been a general slight decrease in projections for red varieties compared with those made by survey respondents last year – when red tonnages were expected to plateau at around 606,000 tonnes.

White varieties on the other hand are forecast to grow from 294,000 tonnes in 2004 to 340,000 tonnes in 2008 - an increase of around 15%. There is an anticipated shortfall in each forecast year, reaching 28,000 tonnes or 8% in 2008. This shortfall is in Riesling, Chardonnay and Semillon *(table 1.9)*. In the case of whites, the forecast tonnages have increased by 35,000 tonnes since last year's survey - suggesting an anticipated change in the future balance between reds and whites in the marketplace.

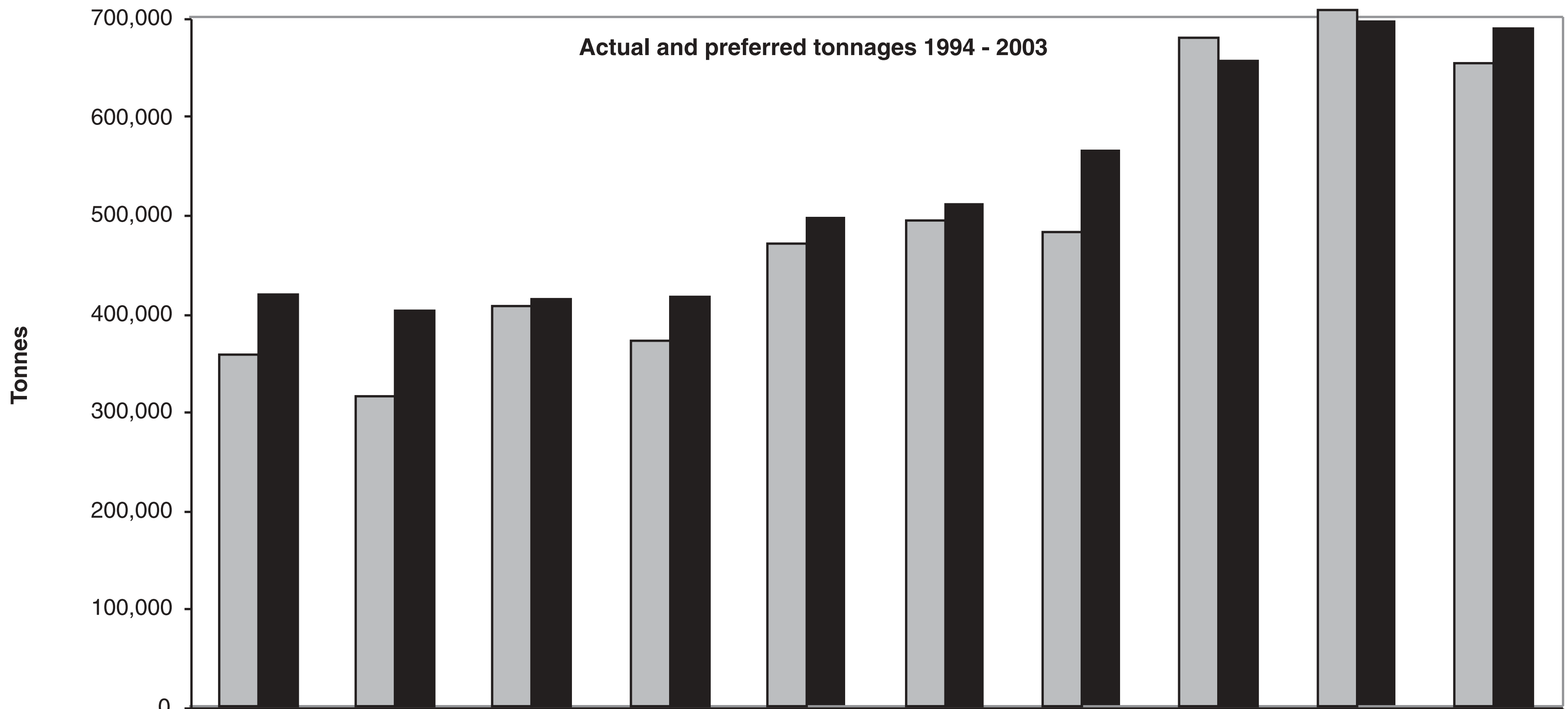
Vineyard plantings

Planting data derived from the Phylloxera and Grape Industry Board's vineyard register shows that there were 66,633 hectares planted to vines in South Australia at 30 April 2003. Of these, 2769 (4%) were planted in 2002 *(table 1.6 and 1.7)*. New planting of red varieties halved compared with 2001 (1330 hectares planted), while new planting of white varieties was similar to 2001 (1400 hectares). For the first time since the mid-1980s, new plantings of white varieties exceeded red varieties *(figure 1.5)*

Using an estimated yield figure for red and white varieties in each region, the required number of hectares to produce the preferred tonnage in 2008 has been calculated for the major South Australian regions *(table 1.8)*. This indicates significant planting requirements in Langhorne Creek, the Riverland and Wrattonbully, while the other major regions already have enough vines to meet the future demand (if the yield estimates are correct) . However, these figures should be treated with caution, as they are subject to signficant fluctuation depending on the forecast figures (which vary from survey to survey) and on the estimates of future yield. These in turn are affected by seasonal variables, as well as strategic decision-making by growers and wineries regarding quality and quantity specifications.

HISTORICAL TRENDS IN PRODUCTION - 1994 TO 2003

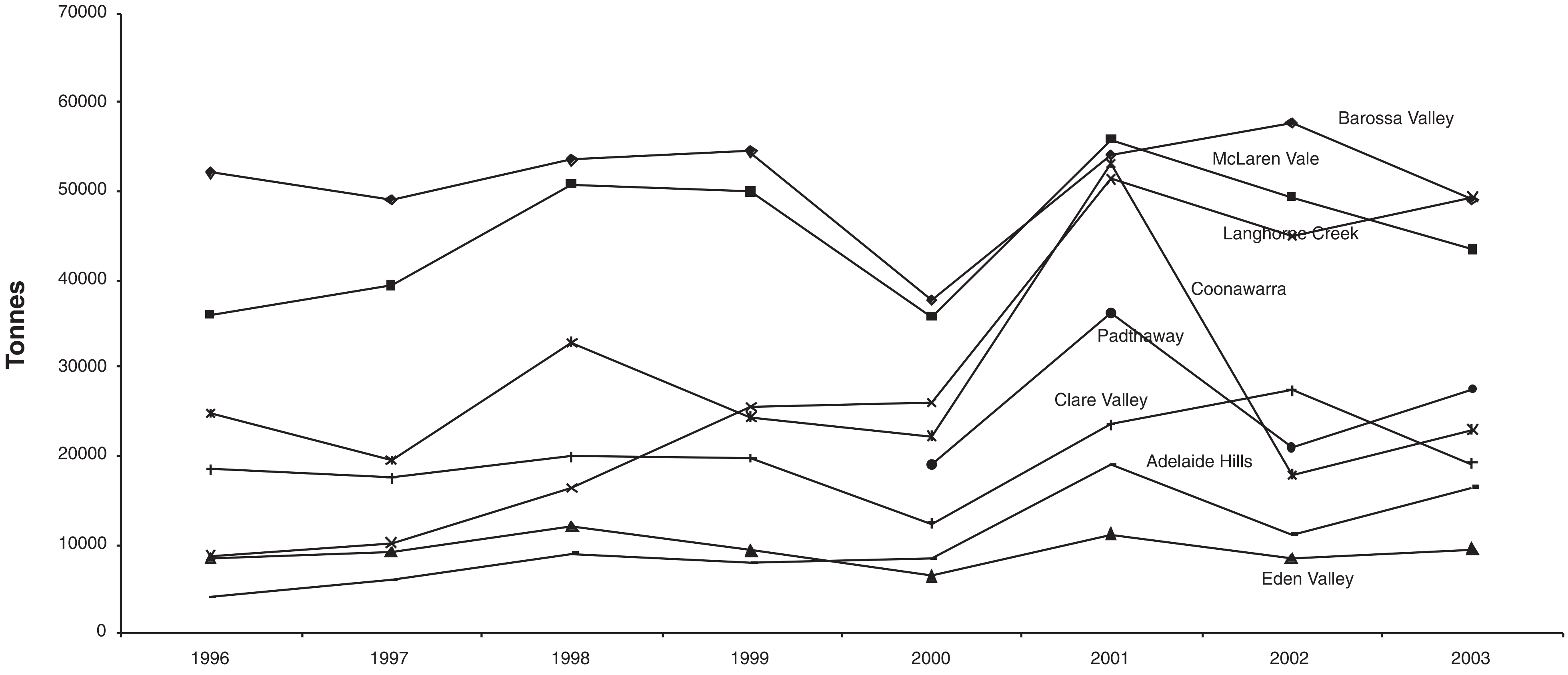
Table 1.1



	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Actual usage	357217	315482	406387	371533	471313	494205	482157	678821	707151	653535
Preferred usage	418983	401665	414101	416162	497349	511863	565750	657414	696920	689556

HISTORICAL TRENDS IN PRODUCTION 1996 TO 2003 BY REGION *

Figure 1.1



* Note: The Riverland is not included on this chart because it does not fit on the same scale.

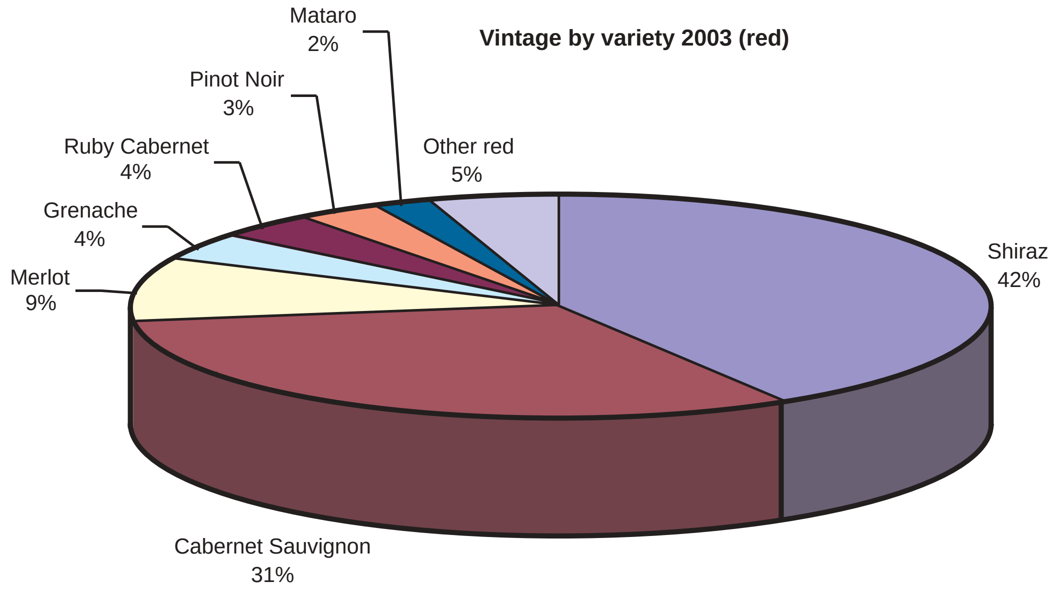
VINTAGE 2003 BY VARIETY - RED

Table 1.2

Variety	***Tonnes crushed***	***Tonnes preferred***	***Diff ****	***% demand supplied***
RED				
Barbera	84	46	38	183%
Cabernet Franc	1,832	1,500	331	122%
Cabernet Sauvignon	138,015	133,389	4,626	103%
Carignan	328	275	53	119%
Chambourcin	91	98	-8	92%
Durif	44	39	5	114%
Grenache	17,297	18,123	-827	95%
Malbec	2,647	2,092	554	126%
Mataro (Mouvedre)	9,165	9,953	-788	92%
Merlot	39,928	41,970	-2,041	95%
Meunier	374	312	61	120%
Nebbiolo	143	106	37	135%
Petit Verdot	12,166	12,063	103	101%
Pinot Noir	13,606	12,615	991	108%
Rubired	248	315	-67	79%
Ruby Cabernet	16,934	7,587	9,347	223%
Sangiovese	2,192	679	1,513	323%
Shiraz	181,788	199,860	-18,073	91%
Tarrango	606	1,040	-434	58%
Tempranillo	192	192	0	100%
Touriga	413	439	-26	94%
Zinfandel	253	244	8	103%
Other red	730	682	47	107%
Total red	**439,074**	**443,621**	**-4,547**	**99%**

** A negative difference indicates a shortfall; a positive difference indicates a surplus*

Figure 1.2



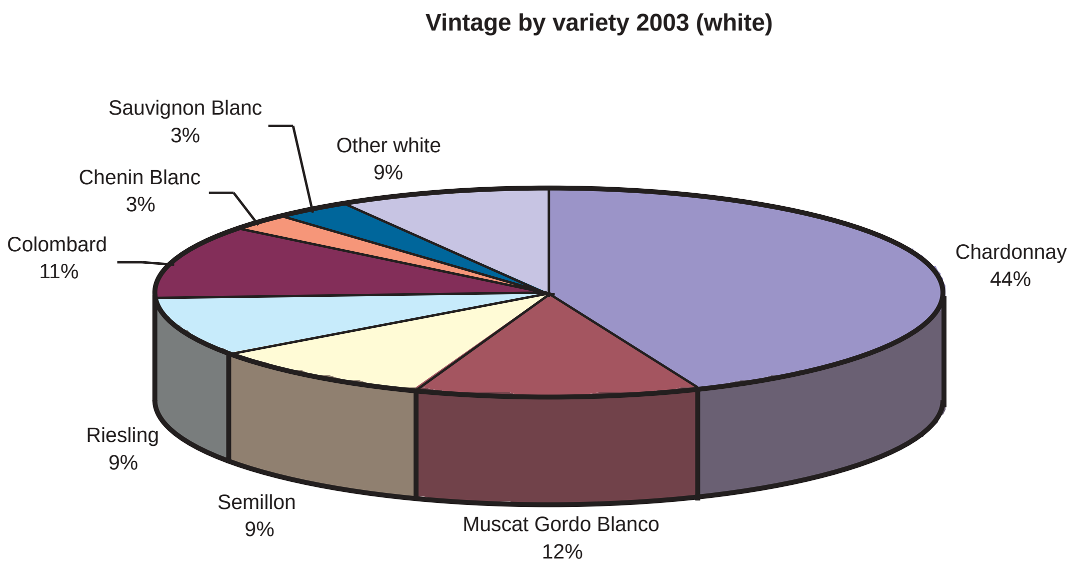
VINTAGE 2003 BY VARIETY - WHITE

Table 1.3

Variety	*Tonnes crushed*	*Tonnes preferred*	*Diff **	*% demand supplied*
WHITE				
Chardonnay	93,925	114,327	-20,403	82%
Chenin Blanc	5,477	4,933	544	111%
Colombard	24,331	26,416	-2,085	92%
Marsanne	75	122	-47	62%
Muscadelle (Tokay)	466	362	104	129%
Muscat Blanc (Frontignac)	1,017	1,554	-537	65%
Muscat Gordo Blanco	25,391	28,127	-2,735	90%
Pinot Gris	511	1,350	-839	38%
Riesling	20,017	19,942	75	100%
Roussanne	28	60	-32	46%
Sauvignon Blanc	6,626	9,882	-3,256	67%
Semillon	19,943	20,021	-79	100%
Sultana	2,473	5,382	-2,910	46%
Taminga	274	219	55	125%
Traminer	1,918	2,008	-90	96%
Trebbiano	291	181	110	161%
Verdelho	4,256	3,779	477	113%
Viognier	1,070	1,266	-196	85%
Other white (1)	6,371	6,004	367	106%
Total white	**214,460**	**245,934**	**-31,474**	**87%**
Total all varieties	**653,535**	**689,556**	**-36,021**	**95%**

(1) Includes neutral whites Crouchen, Pedro Ximenes, Palamino and Doradillo - previously collected as separate varieties

Figure 1.3



** A negative difference indicates a shortfall; a positive difference indicates a surplus*

VINTAGE 2003 BY GI REGION

Table 1.4

Region	Winery grown (tonnes)	Independent grower (tonnes)	Total tonnes crushed	% winery grown
Adelaide Hills	1719	14762	16481	10%
Adelaide Plains	326	5185	5512	6%
Barossa Valley	8703	38377	47079	18%
Barossa zone - other	1749	0	1749	100%
Clare Valley	9064	10138	19202	47%
Coonawarra	13190	9846	23037	57%
Currency Creek	2096	2422	4518	46%
Eden Valley	4349	5097	9446	46%
Far North	0	660	660	0%
Fleurieu zone - other	48	1854	1902	3%
Kangaroo Island	0	15	15	0%
Langhorne Creek	15387	33882	49269	31%
Limestone Coast zone - other	4188	10090	14278	29%
Lower Murray zone - other	204	2920	3124	7%
McLaren Vale	11054	32398	43452	25%
Mount Benson	467	1060	1526	31%
Mount Lofty Ranges zone - other	153	1165	1318	12%
Padthaway	17934	9648	27583	65%
Riverland	50382	318791	369173	14%
Southern Fleurieu	221	453	674	33%
The Peninsulas	19	186	205	9%
Wrattonbully	7258	6074	13333	54%
Total	**148512**	**505023**	**653535**	**23%**

VINTAGE STATISTICS 2003 - SUMMARY BY REGION

Table 1.5

	Total winery grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush	Average reliability of estimated value
Adelaide Hills						
Red	**713**	**8605**	**9319**	**$13,984,211**	**$15,076,682**	**100%**
White	**1006**	**6157**	**7162**	**$10,778,877**	**$12,555,903**	**100%**
Total	**1719**	**14762**	**16481**	**$24,763,088**	**$27,632,585**	
Adelaide Plains						
Red	**192**	**3431**	**3623**	**$4,182,506**	**$4,424,685**	**91%**
White	**134**	**1754**	**1888**	**$1,785,796**	**$1,887,628**	**100%**
Total	**326**	**5185**	**5512**	**$5,968,302**	**$6,312,313**	
Barossa Valley						
Red	**7749**	**25491**	**33240**	**$40,235,156**	**$52,500,050**	**95%**
White	**2703**	**12885**	**15589**	**$12,274,599**	**$14,979,410**	**95%**
Total	**10452**	**38377**	**48829**	**$52,509,755**	**$67,479,460**	
Clare Valley						
Red	**5823**	**7461**	**13284**	**$11,707,357**	**$20,627,429**	**100%**
White	**3241**	**2677**	**5918**	**$3,771,377**	**$8,349,215**	**100%**
Total	**9064**	**10138**	**19202**	**$15,478,734**	**$28,976,644**	
Coonawarra						
Red	**11214**	**8823**	**20036**	**$16,302,623**	**$36,953,963**	**100%**
White	**1977**	**1023**	**3000**	**$1,384,161**	**$3,842,707**	**100%**
Total	**13190**	**9846**	**23037**	**$17,686,784**	**$40,796,670**	

VINTAGE STATISTICS 2003 - SUMMARY BY REGION (CONT.D)

Table 1.5 cont.d

	Total winery grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush	Average reliability of estimated value
Eden Valley						
Red	1844	2781	4624	$4,828,579	$7,792,997	100%
White	2505	2316	4822	$3,535,181	$7,465,589	100%
Total	4349	5097	9446	$8,363,760	$15,258,586	
Fleurieu zone - other						
Red	2059	4371	6430	$7,087,143	$10,398,089	100%
White	305	373	678	$496,749	$912,176	100%
Total	2365	4744	7108	$7,583,892	$11,310,265	
Langhorne Creek						
Red	12634	30706	43340	$42,615,435	$59,836,537	100%
White	2753	3175	5929	$4,108,889	$7,374,398	100%
Total	15387	33882	49269	$46,724,324	$67,210,935	
Limestone Coast zone - other						
Red	3077	10230	13307	$12,531,424	$16,397,872	100%
White	1577	920	2497	$1,050,055	$3,093,936	100%
Total	4654	11150	15804	$13,581,479	$19,491,808	
McLaren Vale						
Red	8999	25686	34684	$43,607,865	$58,706,839	99%
White	2055	6712	8767	$8,623,130	$11,272,687	100%
Total	11054	32398	43452	$52,230,995	$69,979,525	

Table 1.5 cont.d

		Total winery grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush	Average reliability of estimated value
Padthaway							
	Red	**8297**	**7330**	**15626**	**$10,907,324**	**$22,507,656**	**100%**
	White	**9638**	**2319**	**11956**	**$3,272,622**	**$15,609,605**	**100%**
	Total	**17934**	**9648**	**27583**	**$14,179,946**	**$38,117,261**	
Riverland							
	Red	**24165**	**201040**	**225205**	**$114,006,988**	**$127,643,612**	**92%**
	White	**26216**	**117751**	**143967**	**$70,248,866**	**$85,826,996**	**100%**
	Total	**50382**	**318791**	**369173**	**$184,255,854**	**$213,470,608**	
Wrattonbully							
	Red	**6659**	**5854**	**12513**	**$9,297,120**	**$19,138,777**	**100%**
	White	**599**	**220**	**819**	**$363,083**	**$1,236,437**	**100%**
	Total	**7258**	**6074**	**13333**	**$9,660,203**	**$20,375,214**	
SA - other							
	Red	**275**	**3567**	**3841**	**$4,404,246**	**$4,741,737**	**100%**
	White	**102**	**1365**	**1467**	**$787,616**	**$852,972**	**100%**
	Total	**376**	**4932**	**5308**	**$5,191,862**	**$5,594,709**	
Grand Total		**148511**	**505024**	**653535**	**$458,178,978**	**$632,006,582**	

CURRENT PLANTINGS IN SA BY VARIETY (RED)

Table 1.6

Area in hectares by year planted *

Variety	*Pre-99*	*1999*	*2000*	*2001*	*2002*	*Total*	*% planted in 2002*
RED WINEGRAPES							
BARBERA	4	7	4	4	1	19	6%
CABERNET FRANC	236	27	5	14	1	284	0%
CABERNET SAUVIGNON	12989	1883	826	722	221	16641	1%
GRENACHE	1542	157	84	42	30	1855	2%
MALBEC	222	58	21	9	2	313	1%
MATARO (MOUVEDRE)	479	73	48	36	9	645	1%
MERLOT	2906	537	276	316	171	4207	4%
NEBBIOLO	11	26	15	3	0	56	1%
PETIT VERDOT	360	293	119	109	11	893	1%
PINOT NOIR	1061	143	134	58	28	1423	2%
RUBY CABERNET	572	208	36	13	3	832	0%
SANGIOVESE	110	62	49	16	2	239	1%
SHIRAZ	14676	2197	1102	1208	810	19993	4%
TEMPRANILLO	7	17	12	46	35	117	29%
OTHER RED	182	24	38	12	7	263	3%
TOTAL RED WINEGRAPES	**35357**	**5714**	**2770**	**2607**	**1330**	**47779**	**3%**

** Planting data tables record current plantings, by year planted. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground.*

CURRENT PLANTINGS IN SA BY VARIETY (WHITE)

Table 1.7

Area in hectares by year planted*

Variety	*Pre-99*	*1999*	*2000*	*2001*	*2002*	*Total*	*% planted in 2002*
WHITE WINEGRAPES							
CHARDONNAY	6057	126	204	804	987	8178	12%
CHENIN BLANC	282	1	0	0	4	287	1%
COLOMBARD	494	121	101	77	37	829	4%
DORADILLO	175	0	0	1	1	177	1%
MARSANNE	7	5	0	2	2	16	12%
MUSCADELLE	89	0	0	1	0	90	0%
MUSCAT BLANC	136	0	9	3	9	158	6%
MUSCAT GORDO BLANCO	1118	3	4	14	25	1163	2%
PALOMINO	78	0	0	0	0	78	0%
PEDRO XIMENEZ	67	0	0	0	0	67	0%
PINOT GRIS	21	18	23	10	7	79	9%
RIESLING	2123	118	119	201	190	2750	7%
ROUSSANNE	8	0	0	2	0	10	0%
SAUVIGNON BLANC	896	46	91	128	86	1247	7%
SEMILLON	1704	34	27	9	5	1779	0%
SULTANA	552	7	5	10	3	576	0%
TRAMINER	176	1	6	56	36	274	13%
TREBBIANO	49	0	0	0	0	49	0%
VERDELHO	233	24	22	10	0	289	0%
VIOGNIER	64	47	69	63	33	276	12%
OTHER WHITE	172	2	1	5	12	192	6%
TOTAL WHITE WINEGRAPES	**14498**	**553**	**682**	**1395**	**1435**	**18563**	**8%**
ROOTSTOCK BLOCK	32	22	0	1	0	55	0%
ALL OTHER VARIETIES	225	4	3	1	4	237	2%
TOTAL ALL VARIETIES	**50113**	**6294**	**3455**	**4003**	**2769**	**66633**	**4%**

** Planting data tables record current plantings, by year planted. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground.*

CURRENT PLANTINGS IN SA BY GI REGION

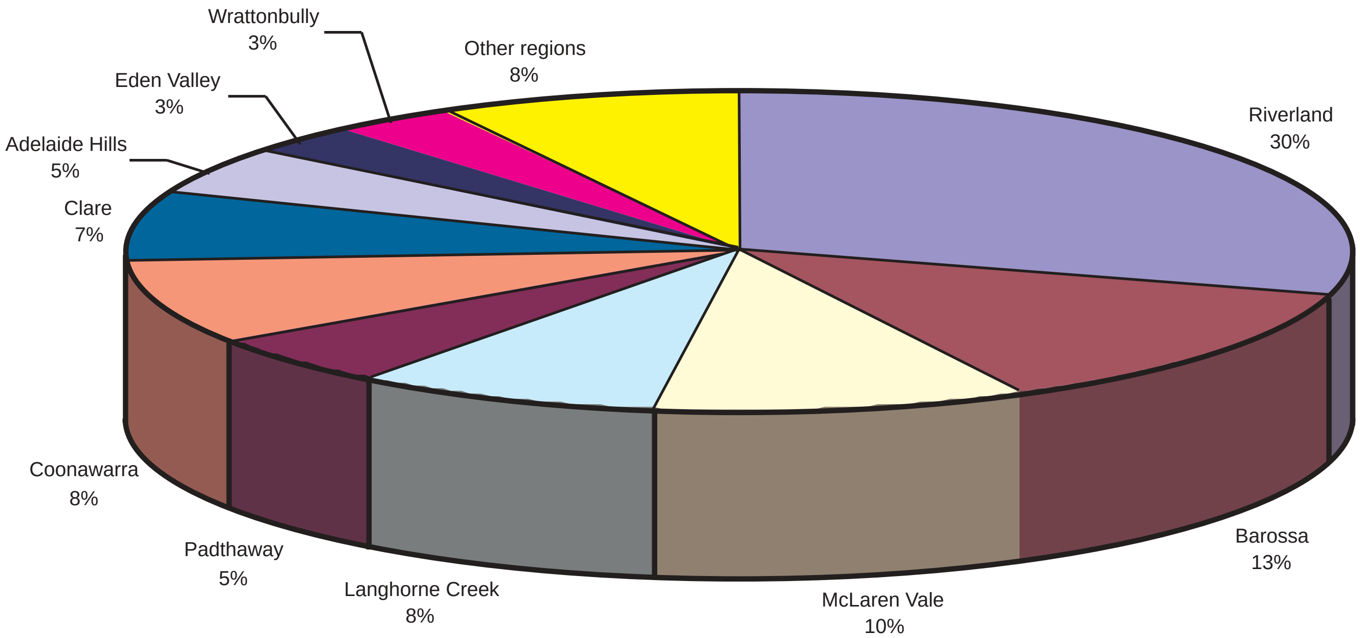
Table 1.8

Area in hectares by year planted

GI region/zone	*Pre-99*	*1999*	*2000*	*2001*	*2002*	*Total area (ha)*	*% planted in 2002*	*% of state plantings*
MOUNT LOFTY ZONE								
Adelaide Hills	2034	337	354	356	188	3269	6%	4.9%
Clare Valley	3713	497	302	131	120	4763	3%	7.1%
Adelaide Plains	350	6	32	19	3	409	1%	0.6%
Mount Lofty Zone - other	159	55	22	36	7	279	2%	0.4%
Total for Mount Lofty Zone	6255	896	709	542	317	8719	4%	13.1%
BAROSSA ZONE								
Eden Valley	1597	205	47	117	87	2054	4%	3.1%
Barossa Valley	6240	594	580	683	623	8720	7%	13.1%
Barossa zone - other	70	1	0	14	0	85	0%	0.1%
Total for Barossa Zone	7908	800	627	814	710	10859	7%	16.3%
FLEURIEU ZONE								
McLaren Vale	4873	781	275	345	162	6437	3%	9.7%
Langhorne Creek	3973	627	149	399	295	5444	5%	8.2%
Kangaroo Island	45	18	12	25	4	105	4%	0.2%
Southern Fleurieu	197	20	18	16	3	254	1%	0.4%
Currency Creek	236	57	137	105	23	560	4%	0.8%
Fleurieu zone - other	110	41	54	13	4	222	2%	0.3%
Total for Fleurieu Zone	9434	1545	645	903	493	13020	4%	19.5%
LOWER MURRAY ZONE								
Riverland	15642	1468	723	967	751	19551	4%	29.3%
Lower Murray zone - other	262	58	40	18	20	398	5%	0.6%
Total for Lower Murray Zone	15904	1526	763	984	771	19949	4%	29.9%
LIMESTONE COAST ZONE								
Coonawarra	4497	478	198	166	88	5427	2%	8.1%
Padthaway	2927	219	176	102	195	3618	5%	5.4%
Wrattonbully	1278	218	113	267	75	1952	4%	2.9%
Mount Benson	216	68	54	80	43	461	9%	0.7%
Bordertown	521	506	107	81	36	1252	3%	1.9%
Limestone Coast zone - other	1039	19	44	42	24	1167	2%	1.8%
Total for Limestone Coast Zone	10478	1509	692	738	461	13878	3%	20.8%
OTHER ZONES								
Far North Zone	112	17	18	17	15	180	8%	0.3%
The Peninsulas Zone	23	0	0	4	2	29	7%	0.0%
Total for All GI s	**50113**	**6294**	**3455**	**4003**	**2769**	**66633**	**4%**	**100.0%**

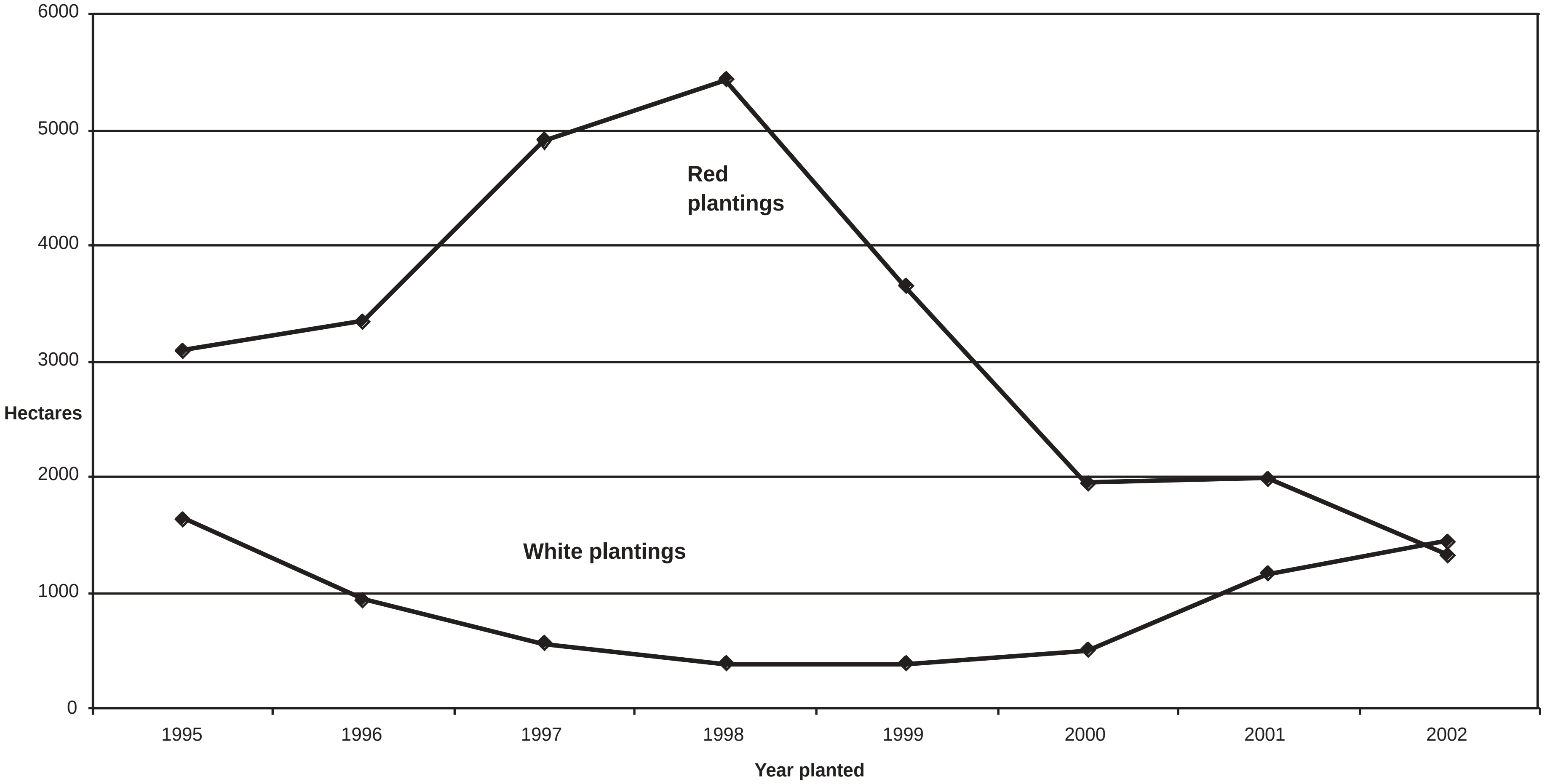
CURRENT PLANTINGS IN SA - PROPORTION FOR EACH GI REGION

Figure 1.4



NEW PLANTINGS IN SOUTH AUSTRALIA SINCE 1995

Figure 1.5



ESTIMATED AREA REQUIRED TO MEET PROJECTED DEMAND IN 2008

Table 1.9

Region	Colour	2008 demand (tonnes)	Est yield (1)	Vineyard area required (2)	Current vineyard area (ha)	Difference (3)
Adelaide Hills	Red	11173	9	1241	1672	431
	White	18523	10	1852	1594	-258
Barossa Valley	Red	59704	10	5970	6707	737
	White	23739	11	2158	2083	-75
Clare Valley	Red	21221	10	2122	3366	1244
	White	13521	11	1229	1394	165
Coonawarra	Red	35969	9	3997	4755	758
	White	5224	10	522	673	151
Eden Valley	Red	5879	10	588	1147	559
	White	10715	11	974	907	-67
Langhorne Creek	Red	68021	12	5668	4648	-1020
	White	11541	13	888	796	-92
McLaren Vale	Red	49026	10	4903	5308	405
	White	16485	11	1499	1125	-374
Padthaway	Red	19964	10	1996	2171	175
	White	14007	11	1273	1447	174
Riverland	Red	272976	17	16057	11860	-4197
	White	241363	20	12068	7427	-4641
Wrattonbully	Red	33433	11	3039	1785	-1254
	White	1615	12	135	167	32
Net requirement (shortfall)						**-7149**

(1) Based on indusry opinion. Assumes maintenance of current quality specifications and returns to growers.
(2) Additional plantings would have to be planted by 2005 (Riverland) or 2004 (other regions)
(3) A negative number indicates a shortfall; a positive number indicates a surplus.

FORECAST SUPPLY AND DEMAND 2004 - 2008 BY VARIETY (RED)

Table 1.10

	2004		2005		2006		2007		2008	
Variety	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*
Barbera	131	81	146	94	132	75	135	78	106	49
Black Muscat	10	10	10	15	10	15	10	20	10	25
Cabernet Franc	2358	1618	2234	1629	2218	1639	2205	1641	1983	1572
Cabernet Sauvignon	188965	163796	192093	181796	191595	188611	188662	192874	186083	193817
Chambourcin	160	155	100	95	100	95	100	95	100	95
Durif	35	46	43	54	68	79	120	131	120	131
Grenache	20079	20646	20151	21306	19998	22468	19723	22970	19029	23211
Malbec	2936	2396	2772	2344	2795	2360	2803	2363	2681	2271
Mataro (Mouvedre)	9954	9984	9982	9944	9652	9832	9348	9619	9016	9327
Merlot	49313	48747	53037	53869	55513	57906	56521	60078	56866	61759
Muscat Brown	33	33	33	33	33	33	33	33	33	33
Nebbiolo	235	138	250	152	247	149	248	150	180	102
Other red	1693	1496	1682	1482	1693	1490	1670	1483	1347	1419
Petit Verdot	12260	13218	13154	14218	13259	14363	14367	13477	11404	12930
Pinot Noir	15378	14963	16196	16190	15957	16819	15814	17078	15383	16979
Rubired	246	246	211	211	211	211	191	191	191	191
Ruby Cabernet	16730	6056	16021	6079	15647	5984	14631	5737	14239	5442
Sangiovese	2277	730	2279	768	2075	780	2063	783	1652	709
Shiraz	237149	224825	245867	245318	252908	259418	254079	267517	248342	274563
Tarrango	1350	1350	1250	1250	750	750	750	750	750	750
Tempranillo	642	524	861	707	978	830	906	775	869	739
Zinfandel	214	206	203	190	188	171	189	178	189	178
Total for RED	562149	511262	578574	557743	586025	584077	584566	598020	570574	606291

FORECAST SUPPLY AND DEMAND 2004 - 2008 BY VARIETY (WHITE)

Table 1.10

	2004		2005		2006		2007		2008	
Variety	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*	*Estimated*	*Preferred*
Chardonnay	136067	146105	159510	167549	173973	184095	179342	191625	178167	192924
Chenin Blanc	6334	5801	6801	5737	6391	5622	6487	5608	6247	5624
Colombard	37393	37286	38655	39298	38592	39423	37828	38798	37876	38793
Marsanne	158	158	161	161	164	164	184	184	184	184
Muscadelle	551	347	515	338	512	335	433	258	433	258
Muscat Blanc	1135	1237	1163	1405	1327	1583	1297	1605	1285	1619
Muscat Gordo Blanco	25740	27333	26264	27530	24980	26496	24005	25531	23549	24885
Other white	7415	6684	7599	6740	7268	6607	7014	6302	6813	6185
Pinot Gris	577	2408	653	2468	1173	2533	1194	2539	1143	2507
Riesling	23610	24243	25608	26388	27257	28465	28586	30317	28153	31192
Rousanne	35	60	78	78	121	81	121	81	121	81
Sauvignon Blanc	12821	12899	14966	15207	15925	16466	16192	17157	16253	17220
Semillon	25697	24976	24999	25001	24359	27164	23517	27940	23136	29261
Sultana	5384	6797	5074	6404	4626	5794	4517	5717	4312	5512
Taminga	136	136	136	136	136	136	136	136	136	136
Traminer	3328	3013	4065	3585	4719	4215	4886	4395	4612	4431
Trebbiano	291	321	275	305	276	296	276	296	276	296
Verdelho	5138	4487	4966	4312	4961	4389	4795	4234	4392	4109
Viognier	1879	1869	2471	2426	2744	2688	2809	2765	2669	2679
Total for WHITE	293689	306159	323959	335067	339504	356551	343617	365486	339757	367895
Total for all varieties	855838	817421	902533	892810	925529	940628	928183	963506	910331	974186