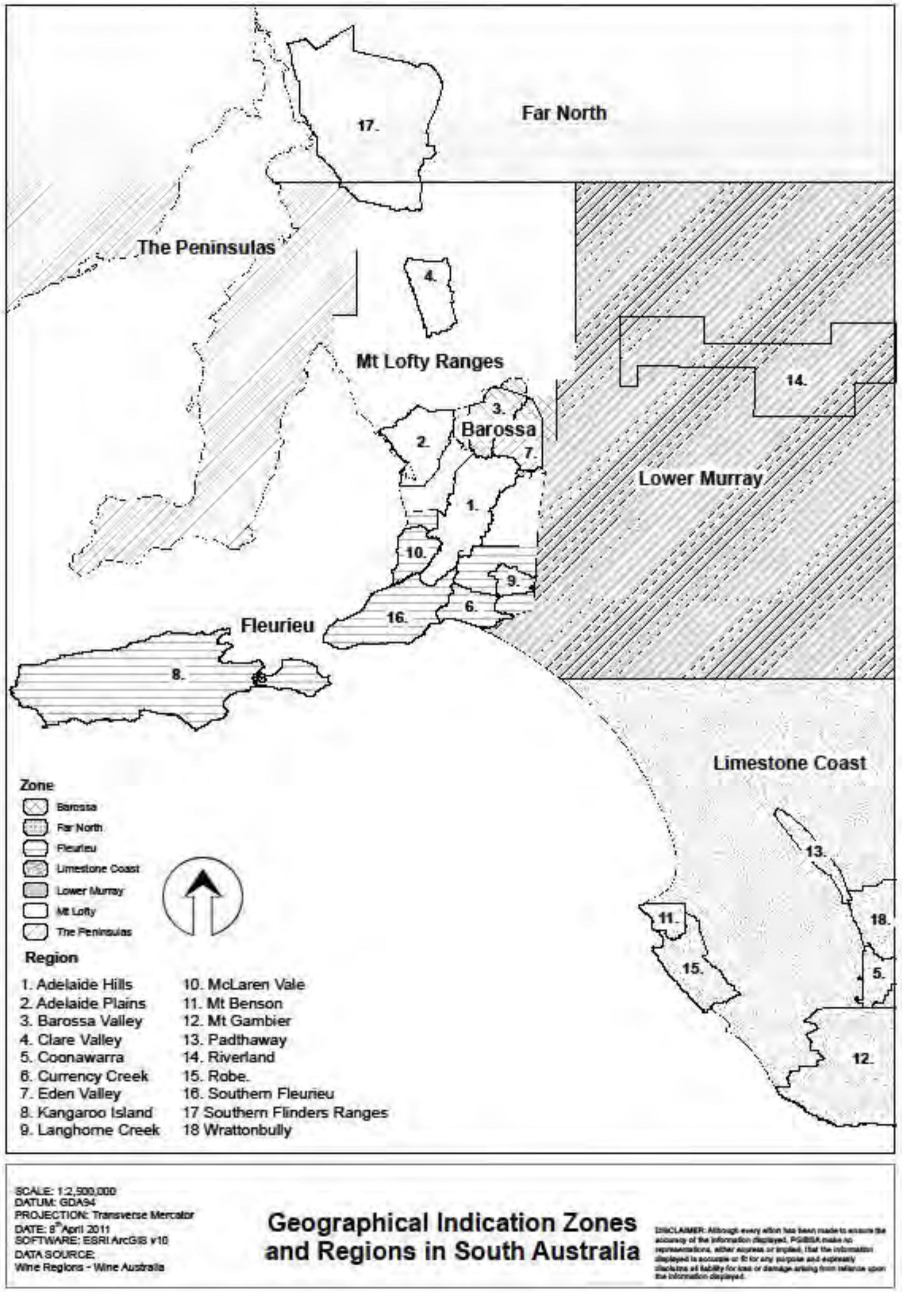


The South Australian Winegrape Crush Survey

State summary report 2012

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 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.

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

Supply forecasts have been calculated independently using the planting information obtained from the PGIBSA vineyard register (see below). They are calculated by multiplying the area of vines by an estimated yield figure determined separately for each variety in each region, which takes into account industry practices and objectives as well as historical averages. However, the supply forecasts do not make any allowance for future vine removals or mothballing, yield capping or the effects of ongoing water restrictions or unusual seasonal conditions.

Committed intake

Committed intake is the amount of fruit that wineries are *already* committed to take in, for a given future year. 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

Available supply

Available supply (uncommitted fruit) is the difference between estimated supply and committed intake. It is the amount of fruit estimated to be available on the open (spot) market. NB If the committed intake is higher than the estimated supply, this indicates a discrepancy between the independent supply forecasts and the wineries' estimates of future production. In this case, available supply is recorded as zero – rather than as a negative number.

Comparing supply and committed intake

In order to compare supply with committed intake, the latter figures are "raised" to compensate for non-respondents. There is no raising of supply figures because it is assumed that the PGIBSA vineyard planting information is close to 100% complete. The non-response rate is calculated separately for each region and is indicated below the relevant tables.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2012 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 2011 and include all plantings from the 2010 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 2011 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 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.

Overview of vintage statistics 2012

State and regional overview

The total crush of South Australian winegrapes in 2012 was 698,005 tonnes. This was an increase of 15,334 tonnes above the 2011 harvest; with the top three regions being – the Riverland 59% (411,529 tonnes crushed), Barossa Valley 7.4% (50,899 tonnes crushed) and Langhorne Creek 7.0% (48,651 tonnes crushed).

The Riverland increased its production by 7.7% on the 2011 figures, as well as Langhorne Creek, up by 23%; whilst production was down for McLaren Vale by 30%, Adelaide Hills by 21% and Barossa Valley by 18%. The regions in the South East saw production at – Wrattonbully up by 35%, Padthaway up by 12.6% and Coonawarra down by 8.4%.

The total estimated purchase value of the crush was $420 million, up by $60 million (14.3%) from 2011. The average purchase value per tonne across the state increased on 2011 figures by 7.2% (up $41 per tonne) to $607 per tonne. The average purchase values for nearly all the major varieties increased, whilst Sauvignon Blanc decreased by $27 per tonne to $620 per tonne.

After a challenging 2011 harvest, growers applied appropriate controls for pest and disease management. All regions reported low yields, except for the Riverland and Adelaide Plains where yields were high. The overall quality of the 2012 vintage has been summed up as “excellent” and “the vintage of the century”, with good quality fruit, intense colours and flavour.

Varietal overview

The red crush was 416,582 tonnes; the white crush was 281,423 tonnes. Among the white varieties, Chardonnay accounted for 20.3% (152,737 tonnes) of the production, down from 2011 by 31.7%, with Colombard up by 8,115 tonnes (26.8%) and its close rival Sauvignon Blanc down by 2,602 tonnes (9.8%). Of the red varieties, Shiraz accounted for 28.9% (201,540 tonnes) of the crush, with Cabernet Sauvignon second at 17% (118,385 tonnes). Across all varieties, the proportion of purchased versus winery grown fruit was similar to 2010 and 2011 at 73%.

Vineyard plantings

Planting data derived from the Phylloxera and Grape Industry Board’s vineyard register shows that there were 76,589 hectares planted to vines in South Australia as at 30 April 2012. This represents a net increase in the total area of 94 hectares since April 2011, compared to decreases in 2011 of 557 hectares and 1,600 hectares in 2010. There was a total of 354 hectares (<1% of the total area) planted in spring 2011 (including top-working and replants). There were more than 68.6% new plantings of red than white varieties, compared with an equal split in 2008. The top 4 most planted varieties were all red varieties – Nebbiolo (81 ha), Merlot (61 ha), Sangiovese (22 ha) and Zinfandel (22 ha). Sauvignon Blanc (20 ha) was the most planted white variety followed by Muscat Gordo Blanco (17 ha).

There were a total of 3,626 growers registered with the Board as at 30 April 2012. 2,113 growers (58.3%) have properties smaller than 10 hectares and account for 12% of the total vineyard area, while 126 growers (3.5%) have properties larger than 100 hectares (in the same region) and account for 38.7% of the vineyard area.

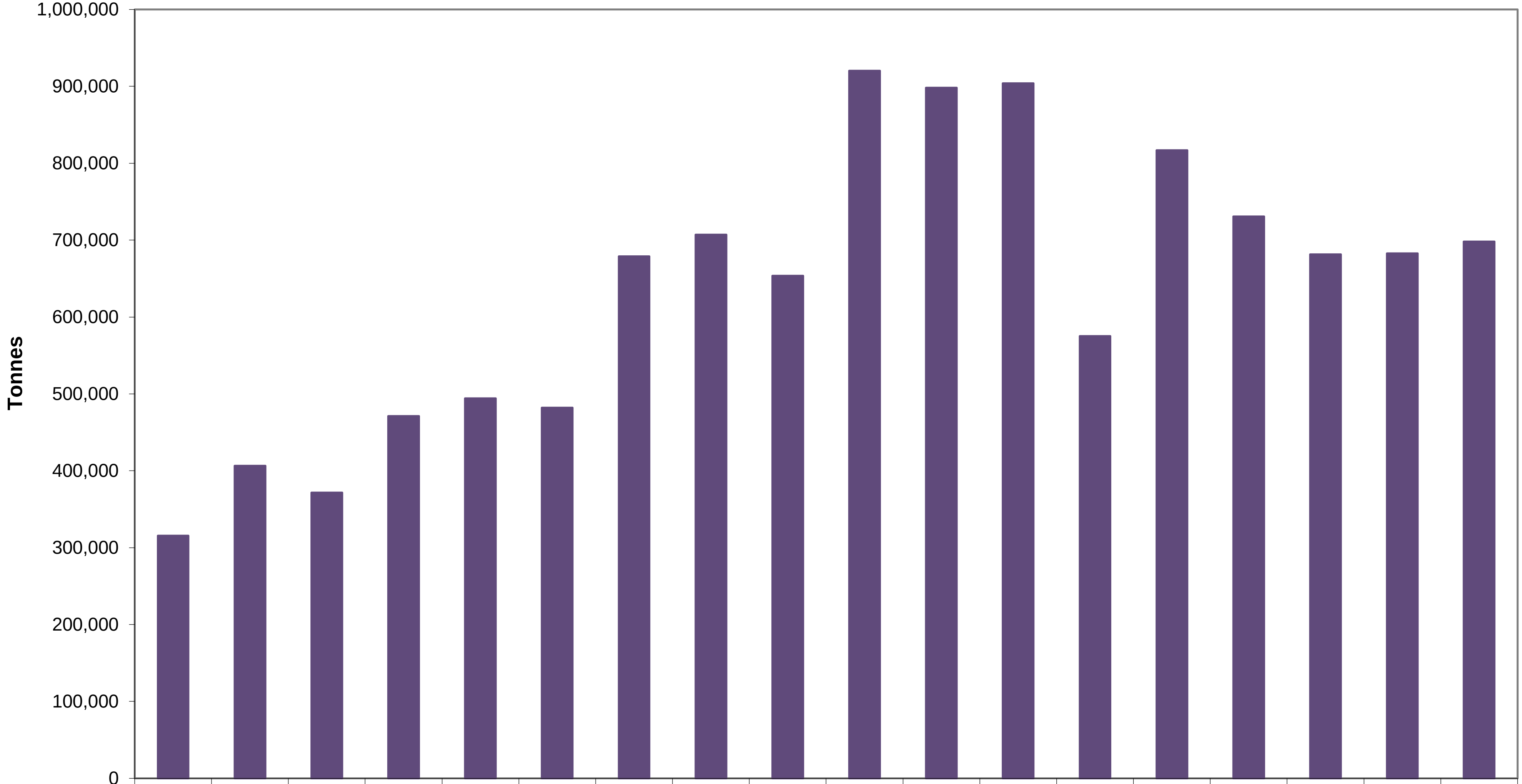
Projections for future supply and requirements

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 2013 for South Australia is estimated at 835,000 tonnes. Approximately 698,000 tonnes is either winery grown fruit or already contracted; indicating there may be a potential surplus of 137,000 tonnes of fruit next year.

The estimated supply of grapes for South Australia in 2017 is around 845,000 tonnes. This estimate is based on the assumption of a return to “normal” growing conditions. It does not take into account any residual effects of disease pressures water allocations, quality or industry restructuring initiatives driven by consumer demand. This could result in an oversupply of nearly 273,000 tonnes, as winery demand for 2017 as reported in the survey is only 572,000 tonnes. It is important to note that due to uncertainty in the market place, an increasing number of reporting wineries were unable to estimate demand beyond 2013.

State summary

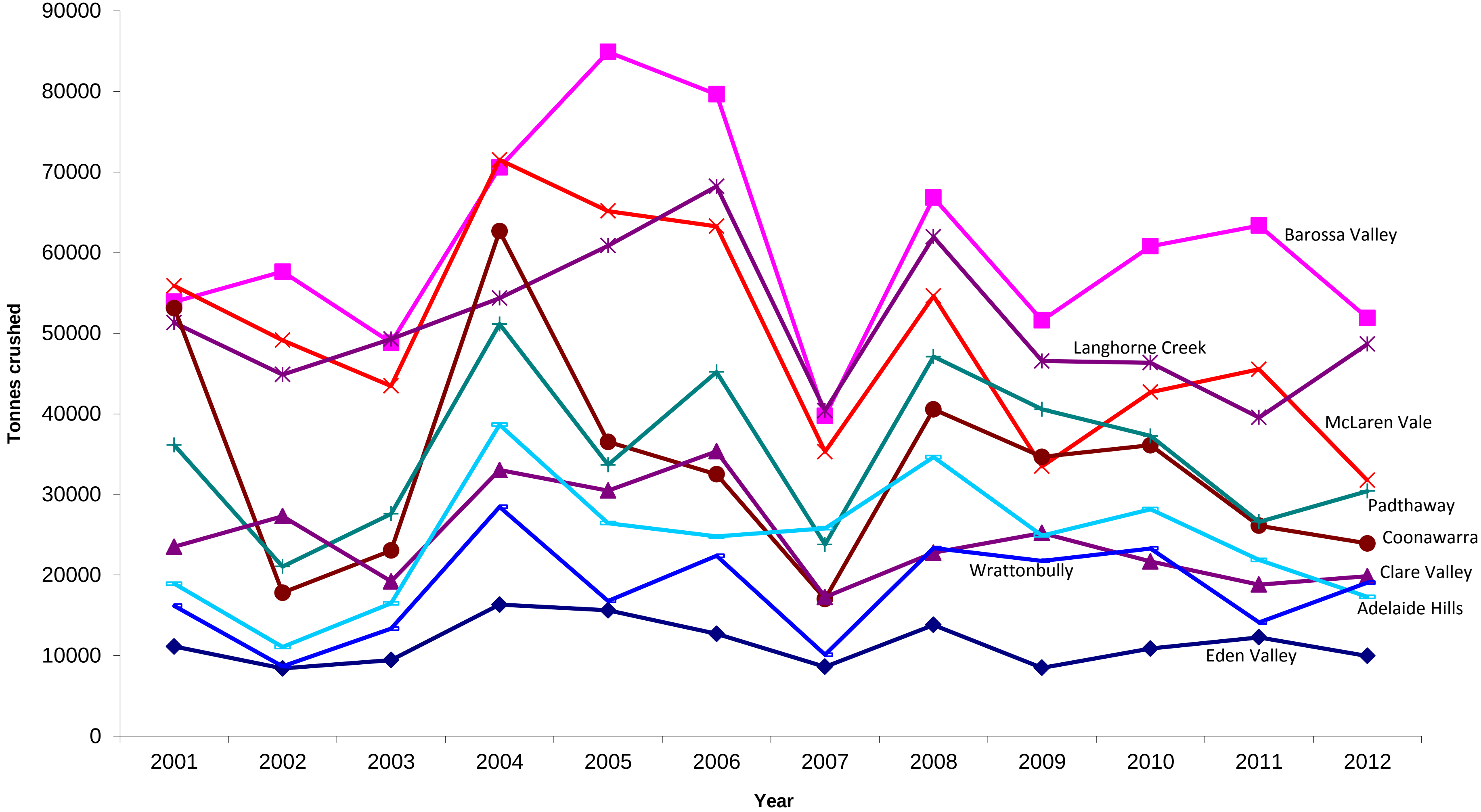
Historical grape crush 1995 - 2012



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Actual tonnage	315,482	406,387	371,533	471,313	494,205	482,157	678,821	707,151	653,535	920,194	898,165	904,022	575,111	816,868	730,904	681,578	682,671	698,005

Vintage by region 2001 - 2012

Not including the Riverland



Total crush by GI region 2012 vs 2011

GI region	*Winery grown (tonnes)*	*Purchased (tonnes)*	*Total crushed 2012*	*% of state crush*	*Total crush 2011*	*% difference 2012 vs 2011*
Adelaide Hills	3,277	13,999	17,276	*2%*	21,871	*-21%*
Adelaide Plains	574	3,885	4,458	*1%*	5,204	*-14%*
Barossa Valley	13,493	37,406	50,899	*7%*	62,118	*-18%*
Barossa Zone other	869	129	998	*0%*	1,249	*-20%*
Clare Valley	9,239	10,609	19,847	*3%*	18,801	*6%*
Coonawarra	15,177	8,743	23,920	*3%*	26,109	*-8%*
Currency Creek	1,403	4,345	5,748	*1%*	6,488	*-11%*
Eden Valley	4,821	5,139	9,960	*1%*	12,262	*-19%*
Fleurieu zone - other	34	1,830	1,863	*0%*	1,005	*85%*
Kangaroo Island	57	67	124	*0%*	153	*-19%*
Langhorne Creek	15,068	33,583	48,651	*7%*	39,546	*23%*
Limestone Coast zone - other	5,194	7,035	12,230	*2%*	8,638	*42%*
Lower Murray zone - other	-	2,188	2,188	*0%*	1,472	*49%*
McLaren Vale	14,115	17,640	31,755	*5%*	45,518	*-30%*
Mount Benson	335	1,083	1,419	*0%*	2,744	*-48%*
Mount Gambier	-	499	499	*0%*	-	*0%*
Mount Lofty Ranges zone - other	85	1,200	1,285	*0%*	2,081	*-38%*
Padthaway	15,260	15,152	30,413	*4%*	26,586	*14%*
Riverland	52,336	359,193	411,529	*59%*	382,223	*8%*
Robe	1,222	313	1,535	*0%*	2,228	*-31%*
Southern Fleurieu	79	1,343	1,422	*0%*	1,134	*25%*
Southern Flinders Ranges	22	694	716	*0%*	564	*27%*
The Peninsulas	60	157	217	*0%*	571	*-62%*
Wrattonbully	10,400	8,653	19,052	*3%*	14,105	*35%*
Total all regions	**163,120**	**534,885**	**698,005**	***100%***	**682,671**	***2%***

Vintage Summary by region 2012

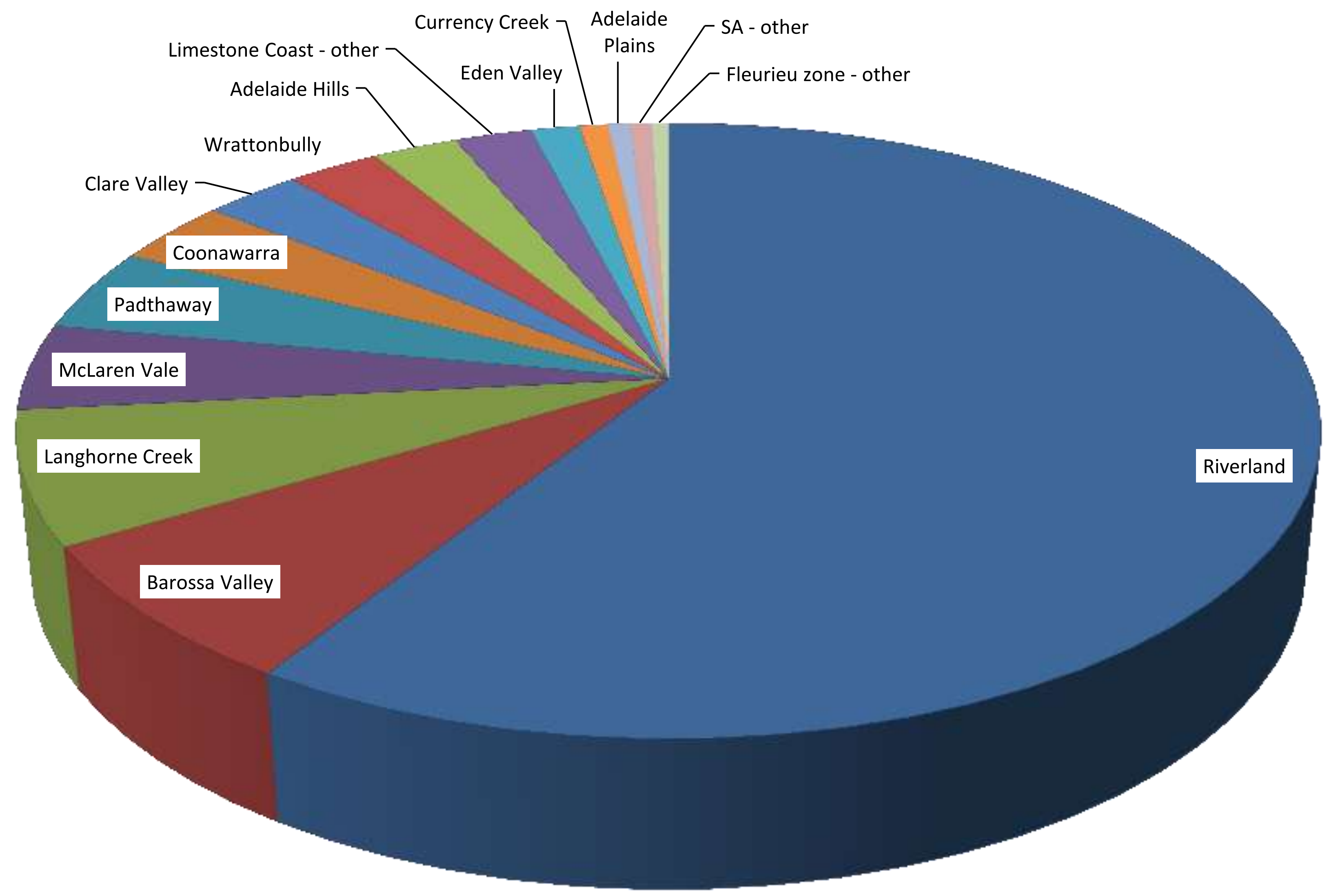
Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Adelaide Hills	Red	993	4,757	5,750	$5,667,219	$6,905,932
	White	2,284	9,242	11,526	$10,762,848	$13,583,843
	All	3,277	13,999	17,276	$16,430,067	$20,489,776
Adelaide Plains	Red	222	2,511	2,733	$1,795,959	$1,970,072
	White	352	1,374	1,725	$924,496	$1,165,122
	All	574	3,885	4,458	$2,720,455	$3,135,194
Barossa Valley	Red	11,075	30,505	41,580	$42,417,563	$58,041,134
	White	3,288	7,030	10,317	$4,278,180	$6,356,746
	All	14,362	37,535	51,897	$46,695,743	$64,397,880
Clare Valley	Red	5,602	5,684	11,286	$5,811,847	$11,558,618
	White	3,637	4,925	8,562	$4,294,460	$7,503,541
	All	9,239	10,609	19,847	$10,106,307	$19,062,158
Coonawarra	Red	12,421	8,132	20,553	$10,208,295	$25,315,464
	White	2,756	611	3,367	$389,587	$2,306,128
	All	15,177	8,743	23,920	$10,597,882	$27,621,593
Currency Creek	Red	439	3,883	4,322	$3,441,394	$3,836,661
	White	964	462	1,426	$308,027	$829,328
	All	1,403	4,345	5,748	$3,749,421	$4,665,989
Eden Valley	Red	2,000	2,284	4,283	$3,550,338	$6,420,045
	White	2,821	2,855	5,677	$2,906,492	$5,789,711
	All	4,821	5,139	9,960	$6,456,830	$12,209,755
Fleurieu zone - other	Red	107	1,782	1,888	$1,291,498	$1,368,150
	White	62	1,458	1,521	$808,258	$841,119
	All	169	3,240	3,409	$2,099,756	$2,209,270

Vintage Summary by region 2012

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Langhorne Creek	Red	11,920	26,510	38,430	$20,154,655	$29,095,411
	White	3,148	7,072	10,220	$4,162,411	$5,925,928
	All	15,068	33,583	48,651	$24,317,066	$35,021,340
Limestone Coast zone - other	Red	5,207	7,541	12,748	$5,991,859	$10,234,994
	White	1,545	1,389	2,934	$1,010,102	$2,081,066
	All	6,752	8,930	15,682	$7,001,961	$12,316,059
McLaren Vale	Red	11,785	14,613	26,399	$19,919,259	$35,781,393
	White	2,329	3,027	5,356	$2,189,316	$3,881,284
	All	14,115	17,640	31,755	$22,108,575	$39,662,677
Padthaway	Red	8,275	8,843	17,119	$7,502,491	$14,422,233
	White	6,985	6,309	13,294	$4,650,872	$9,265,310
	All	15,260	15,152	30,413	$12,153,363	$23,687,544
Riverland	Red	33,820	176,703	210,523	$64,100,809	$76,374,600
	White	18,517	182,490	201,006	$54,366,175	$59,875,044
	All	52,336	359,193	411,529	$118,466,984	$136,249,644
SA - other	Red	146	3,400	3,546	$2,398,686	$2,512,175
	White	21	840	861	$344,618	$354,203
	All	167	4,240	4,407	$2,743,305	$2,866,378
Wrattonbully	Red	8,323	7,100	15,422	$6,634,309	$14,372,460
	White	2,077	1,553	3,630	$1,086,266	$2,864,137
	All	10,400	8,653	19,052	$7,720,575	$17,236,597
All winegrapes		**163,120**	**534,885**	**698,005**	**$293,368,291**	**$420,831,853**

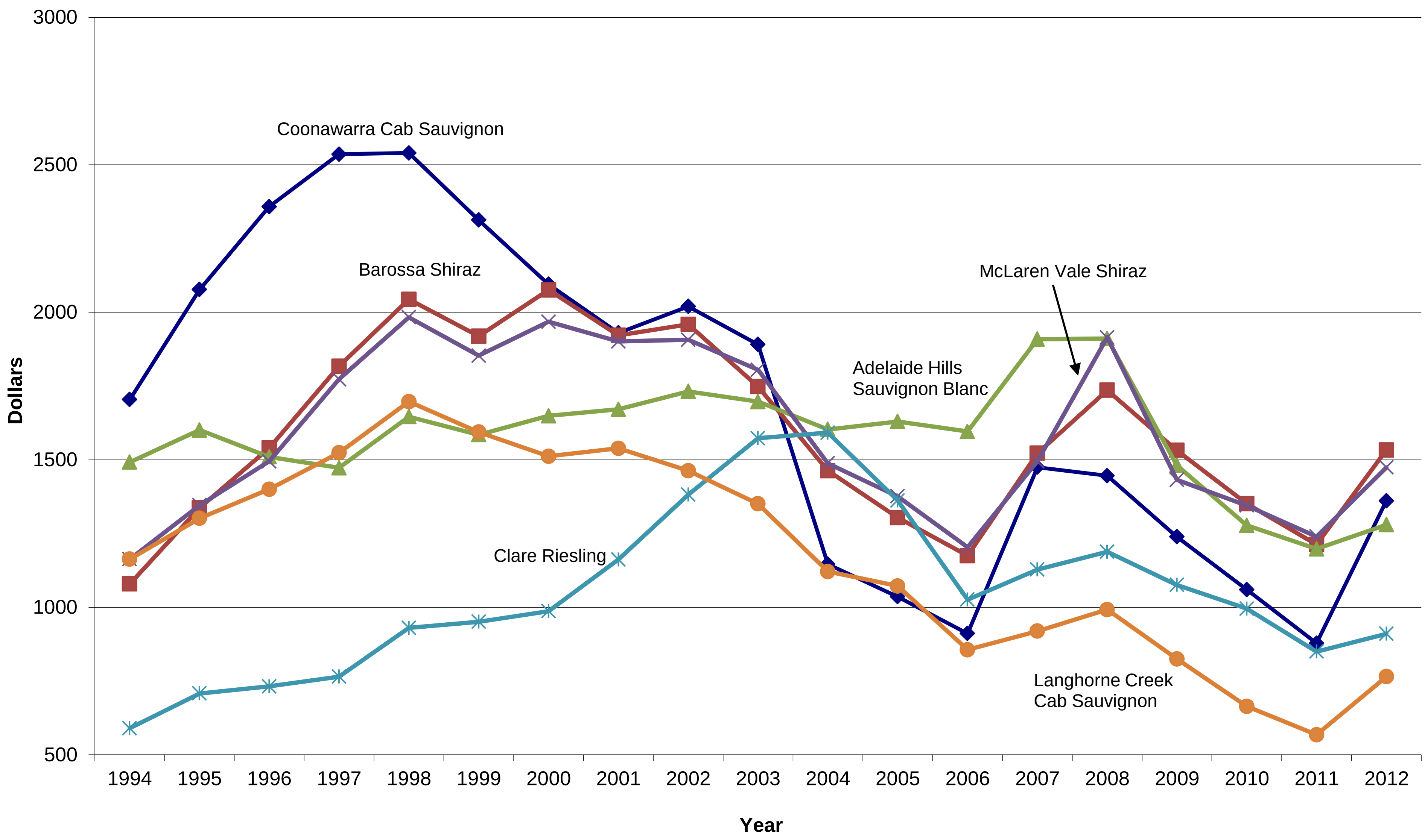
Note: The "estimated value of total crush" is the value estimate from the tonnage and price for all varieties in each region.

Crush by region pie chart



Historical weighted average prices

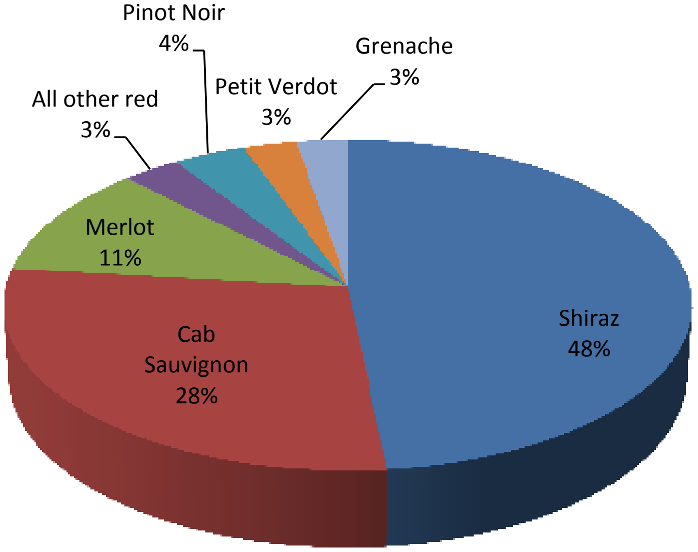
Major variety-region combinations



Vintage summary by variety 2012

Red winegrapes

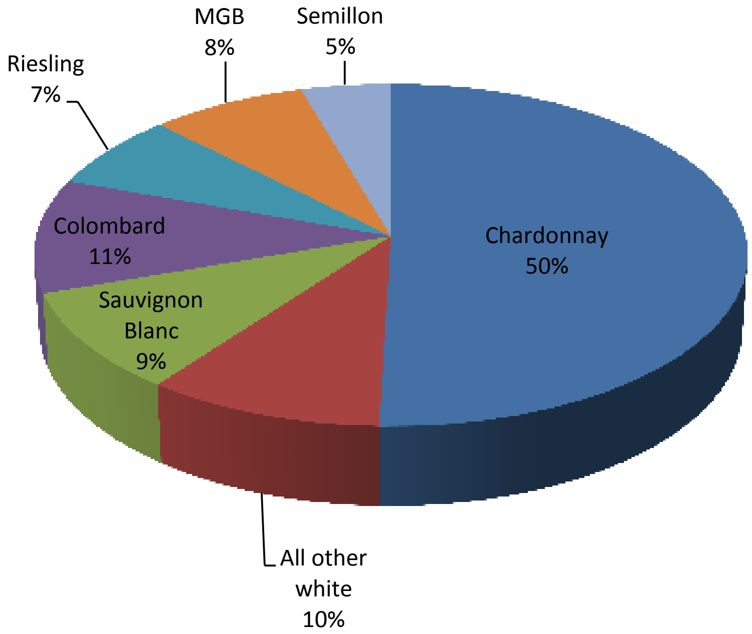
Variety	*Tonnes purchased*	*Winery grown fruit*	*Total crushed*	*% purchased*	*Est total value of crush*
Red winegrapes					
Barbera	124	33	156	79%	$113,616
Cabernet Franc	376	329	705	53%	$465,380
Cabernet Sauvignon	83,496	34,889	118,385	71%	$75,076,643
Carignan	13	19	31	40%	$37,344
Grenache	8,604	2,608	11,212	77%	$8,381,964
Malbec	1,195	437	1,632	73%	$1,163,463
Mataro	3,166	628	3,794	83%	$2,498,286
Merlot	30,757	14,710	45,467	68%	$25,154,604
Meunier	130	21	151	86%	$169,000
Muscat a Petit Grains Rouge /	2	22	24	8%	$23,525
Nebbiolo	47	59	107	44%	$57,919
Other Red	1,613	436	2,049	79%	$1,428,540
Petit Verdot	7,797	3,740	11,536	68%	$4,013,873
Pinot Noir	12,691	3,206	15,898	80%	$10,776,186
Ruby Cabernet	838	130	968	87%	$292,816
Sangiovese	837	533	1,371	61%	$1,272,482
Shiraz	151,442	50,098	201,540	75%	$141,169,527
Tarrango	21	0	21	100%	$5,175
Tempranillo	877	266	1,143	77%	$1,101,540
Touriga	102	121	223	46%	$168,023
Zinfandel	122	47	169	72%	$147,687
Total Red winegrapes	**304,248**	**112,333**	**416,582**	**73%**	**$273,517,595**



Vintage summary by variety 2012

White winegrapes

Variety	Tonnes purchased	Winery grown fruit	Total crushed	% purchased	Est total value of crush
White winegrapes					
Canada Muscat	36	0	36		$19,811
Chardonnay	121,665	20,364	142,030		$50,055,188
Chenin Blanc	2,133	167	2,299		$612,722
Colombard	27,362	2,932	30,294		$6,771,194
Crouchen	27	107	134		$32,045
Doradillo	137	29	167		$33,545
Marsanne	170	104	273		$266,149
Muscadelle	1	66	67		$46,812
Muscat a Petit Grains Blanc	3,007	909	3,916		$1,685,232
Muscat Gordo Blanco	21,795	419	22,214		$9,107,369
Other White	1,368	329	1,697		$1,045,421
Palomino	54	181	235		$97,913
Pedro Ximenes	18	64	82		$60,713
Pinot Gris	5,423	2,695	8,118		$6,541,414
Riesling	10,713	9,307	20,020		$14,698,778
Roussanne	88	62	151		$164,301
Sauvignon Blanc	19,510	7,127	26,636		$16,520,705
Semillon	8,976	3,780	12,755		$4,873,033
Sultana	355	0	355		$77,903
Taminga	108	0	108		$29,863
Traminer	2,700	938	3,638		$1,716,109
Verdelho	1,658	265	1,922		$753,037
Viognier	3,333	943	4,275		$2,419,751
Total White winegrapes	**230,636**	**50,787**	**281,423**		**$117,629,007**
Total All winegrapes	**534,885**	**163,120**	**698,005**		**$391,146,602**



There is an estimated non-response rate of 2.1% across the state.

Note: The "estimated total value of crush" is the value estimated from the tonnage and price by each variety from all regions.

State summary

Current plantings by variety and year planted

Variety	Current area in hectares Pre-2009	2009	2010	2011	Total area	% planted in 2011
White winegrapes						
Chardonnay	10,154	5	2	5	10,165	*0%*
Riesling	2,958	10	12	8	2,988	*0%*
Sauvignon Blanc	2,570	22	5	20	2,618	*1%*
Semillon	1,373	0	2	0	1,375	*0%*
Muscat Gordo Blanco	1,086	12	14	17	1,129	*2%*
Pinot Gris	884	22	19	6	931	*1%*
Colombard	847	0	2	0	849	*0%*
Viognier	551	3	0	1	554	*0%*
Verdelho	260	0	0	0	260	*0%*
Traminer (Gewurztraminer)	219	4	4	0	226	*0%*
Muscat A Petit Grains Blanc	204	18	4	5	231	*2%*
Sultana	191	0	0	2	193	*1%*
Chenin Blanc	157	2	0	2	161	*1%*
Doradillo	82	0	0	0	82	*0%*
Savagnin	44	1	1	0	47	*0%*
Palomino	33	0	0	0	33	*0%*
Muscadelle (Tokay)	33	0	0	0	33	*0%*
Marsanne	30	0	0	0	30	*0%*
Pedro Ximenes	27	0	0	0	27	*0%*
Trebbiano	25	0	0	0	25	*0%*
Roussanne	23	1	0	2	27	*9%*
Fiano	15	7	5	5	32	*17%*
Vermentino	13	25	3	4	45	*10%*
Albarino	13	4	0	0	16	*0%*
Other white	85	7	6	28	127	*22%*
Total white varieties	**21,878**	**142**	**79**	**105**	**22,204**	***0%***

State summary

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2009*	*2009*	*2010*	*2011*	*Total area*	*% planted in 2011*
Red winegrapes						
Shiraz	25,289	201	160	81	25,732	*0%*
Cabernet Sauvignon	16,591	85	50	61	16,787	*0%*
Merlot	4,253	5	4	3	4,265	*0%*
Grenache	1,789	13	15	8	1,825	*0%*
Pinot Noir	1,551	99	22	22	1,694	*1%*
Petit Verdot	749	0	0	0	749	*0%*
Mataro (Mourvedre)	617	17	17	6	657	*1%*
Malbec	226	1	9	16	252	*7%*
Sangiovese	212	3	7	1	223	*1%*
Tempranillo	207	35	27	22	290	*8%*
Cabernet Franc	195	0	1	2	197	*1%*
Ruby Cabernet	169	1	0	0	170	*0%*
Nebbiolo	43	1	1	1	45	*1%*
Meunier (Pinot Meunier)	37	0	0	1	38	*2%*
Zinfandel	34	0	0	1	35	*2%*
Barbara	28	1	1	1	30	*2%*
Durif (Petite Sirah)	28	2	6	0	35	*0%*
Touriga	27	1	0	5	33	*14%*
Montepulciano	9	5	5	7	25	*27%*
Sagrantino	7	3	0	1	10	*5%*
Other red	168	18	13	7	207	*4%*
Total red varieties	**52,229**	**490**	**336**	**243**	**53,298**	***0%***
Unknown variety	838	0	0	1	839	*0%*
Germplasm	1	3	0	0	4	*0%*
Rootstock Block	42	0	0	0	42	*0%*
Multi-purpose red	74	2	3	0	78	*0%*
Multi-purpose white	34	0	0	0	34	*0%*
Tablegrapes - red	56	0	0	1	57	*1%*
Tablegrapes - white	27	0	0	4	31	*14%*
Total all varieties	**75,179**	**638**	**418**	**354**	**76,589**	***0%***

State summary

Current plantings by region and year planted

Zone	Region	Current area in hectares						
Zone	Region	*Pre-2009*	*2009*	*2010*	*2011*	*Total area*	*% planted in 2011*	*% of state plantings*
Barossa	Barossa Valley	10,716	169	165	74	11,124	*1%*	*15%*
	Eden Valley	2,207	15	16	16	2,254	*1%*	*3%*
	Barossa Zone - Other	234	0	0	0	234	*0%*	*0%*
	Total for Barossa	**13,158**	**183**	**181**	**90**	**13,612**	***1%***	***18%***
Fleurieu	Currency Creek	949	8	0	8	965	*1%*	*1%*
	Kangaroo Island	139	3	0	0	142	*0%*	*0%*
	Langhorne Creek	5,951	67	25	18	6,061	*0%*	*8%*
	Mclaren Vale	7,323	57	43	52	7,475	*1%*	*10%*
	Southern Fleurieu	538	0	0	0	538	*0%*	*1%*
	Fleurieu Zone - Other	198	0	0	0	198	*0%*	*0%*
	Total for Fleurieu	**15,132**	**135**	**68**	**78**	**15,414**	***1%***	***20%***
Limestone Coast	Bordertown	1,252	0	4	3	1,259	*0%*	*2%*
	Coonawarra	5,703	10	25	9	5,747	*0%*	*8%*
	Mount Benson	503	0	2	0	505	*0%*	*1%*
	Mount Gambier	242	1	0	0	243	*0%*	*0%*
	Padthaway	4,007	35	8	4	4,053	*0%*	*5%*
	Robe	745	0	0	0	745	*0%*	*1%*
	Wrattonbully	2,642	7	0	13	2,663	*1%*	*3%*
	Limestone Coast Zone - Other	589	7	0	2	598	*0%*	*1%*
	Total for Limestone Coast	**15,683**	**60**	**38**	**31**	**15,813**	***0%***	***21%***
Lower Murray	Riverland	20,353	150	81	95	20,679	*0%*	*27%*
	Lower Murray Zone - Other	444	1	0	0	445	*0%*	*1%*
	Total for Lower Murray	**20,797**	**150**	**81**	**95**	**21,123**	***0%***	***28%***
Mount Lofty Ranges	Adelaide Hills	3,795	81	30	38	3,945	*1%*	*5%*
	Adelaide Plains	662	0	0	0	662	*0%*	*1%*
	Clare Valley	5,387	16	19	14	5,436	*0%*	*7%*
	Mount Lofty Ranges Zone - Other	328	12	0	7	347	*2%*	*0%*
	Total for Mount Lofty Ranges	**10,172**	**109**	**50**	**59**	**10,390**	***1%***	***14%***
Far North	Southern Flinders Ranges	165	0	0	0	165	*0%*	*0%*
The Peninsulas		72	0	0	0	73	*0%*	*0%*
	Total for All GIs	**75,179**	**638**	**418**	**354**	**76,589**	***0%***	***100%***

State Summary

Number of grower by region and property size 2012

Property size in hectares

	< 10		*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	1,362	339	2,508	158	2,321	70	1,482	23	3,456	13	11,129	603
Eden Valley	383	94	463	31	316	10	595	8	496	2	2,254	145
Barossa Zone - Other	15	3	12	1	0	0	84	1	124	1	234	6
Fleurieu												
Currency Creek	66	13	151	10	192	5	0	0	556	2	965	30
Kangaroo Island	119	21	23	2	0	0	0	0	0	0	142	23
Langhorne Creek	119	24	383	23	859	24	1,154	16	3,548	14	6,062	101
McLaren Vale	1,506	360	1,715	110	1,421	43	1,505	21	1,325	6	7,472	540
Southern Fleurieu	122	38	118	9	230	6	68	1	0	0	538	54
Fleurieu Zone - Other	23	7	43	3	0	0	166	2	0	0	232	12
Limestone Coast												
Bordertown	0	0	0	0	43	1	0	0	1,216	5	1,259	6
Coonawarra	290	52	462	31	668	19	1,057	16	3,271	11	5,747	129
Mount Benson	28	5	78	5	155	5	114	2	129	1	505	18
Mount Gambier	59	15	26	2	64	2	94	1	0	0	243	20
Padthaway	9	1	56	4	356	10	478	7	3,088	12	3,986	34
Robe	18	2	75	4	81	2	54	1	517	3	745	12
Wrattonbully	65	12	380	22	449	12	380	5	1,386	6	2,660	57
Limestone Coast Zone - Other	62	14	30	2	59	2	202	3	244	2	598	23
Lower Murray												
Riverland	3,155	621	4,665	300	3,041	89	2,169	30	7,643	34	20,672	1,074
Lower Murray Zone - Other	60	14	168	10	217	7	0	0	0	0	445	31
Mount Lofty Ranges												
Adelaide Hills	762	197	1,030	61	991	29	883	12	279	2	3,945	301
Adelaide Plains	165	52	100	8	81	2	140	2	175	1	662	65
Clare Valley	718	187	814	49	873	25	870	12	2,162	11	5,436	284
Mount Lofty Ranges Zone - Other	86	28	32	2	137	4	92	1	0	0	347	35
The Peninsulas	19	5	21	2	33	1	0	0	0	0	73	8
Southern Flinders Ranges	41	9	92	5	32	1	0	0	0	0	165	15
Grand Total	**9,252**	**2,113**	**13,443**	**854**	**12,619**	**369**	**11,587**	**164**	**29,616**	**126**	**76,514**	**3,626**

State summary

Estimated supply and committed intake 2013 - 2017 (including ALL regions)

	2013				2015				2017			
	Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]			Est Supply [1]	Committed intake[2]		
Variety		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*
Red winegrapes												
Barbera	181	49	102	151	185	57	51	108	185	67	56	124
Cabernet Franc	1,224	460	366	826	1,246	291	356	647	1,246	291	165	456
Cabernet Sauvignon	146,305	52,317	85,594	137,911	147,660	49,191	67,011	116,203	147,660	49,110	60,714	109,824
Carignan	0	26	13	39	0	31	13	44	0	31	13	44
Grenache	18,219	3,126	7,253	10,379	18,324	3,242	4,835	8,077	18,324	3,285	4,754	8,038
Malbec	1,819	529	1,361	1,890	1,888	1,528	992	2,520	1,888	1,549	906	2,455
Mataro	7,072	801	3,659	4,460	7,156	979	3,160	4,139	7,156	1,023	2,799	3,822
Merlot	46,105	16,604	25,406	42,010	46,365	15,744	22,391	38,135	46,365	15,745	20,299	36,044
Meunier	195	34	115	149	196	34	38	72	196	34	38	72
Muscat a Petit Grains Rouge / Rose	0	14	2	16	0	15	2	17	0	16	2	18
Nebbiolo	240	78	68	147	243	88	9	97	243	96	9	106
Other Red	10,758	599	1,778	2,378	11,327	694	1,538	2,232	11,327	689	1,325	2,013
Petit Verdot	11,984	3,993	6,102	10,095	11,984	3,988	5,040	9,028	11,984	3,939	4,706	8,644
Pinot Noir	16,746	4,525	11,429	15,954	17,379	4,594	9,191	13,785	17,379	4,573	7,906	12,479
Ruby Cabernet	3,175	139	576	715	3,175	124	441	565	3,175	124	441	565
Sangiovese	1,905	475	749	1,223	1,922	492	489	981	1,922	493	508	1,001
Shiraz	246,461	64,158	132,899	197,057	249,358	63,535	106,102	169,637	249,358	64,202	95,122	159,324
Tarrango	0	0	0	0	0	0	0	0	0	0	0	0
Tempranillo	2,156	426	1,014	1,440	2,357	757	761	1,518	2,357	825	602	1,426
Touriga	0	140	104	244	0	148	98	246	0	148	86	234
Zinfandel	111	38	76	114	111	41	76	117	111	31	76	107
Total red winegrapes	**514,651**	**148,531**	**278,666**	**427,197**	**520,876**	**145,573**	**222,595**	**368,168**	**520,876**	**146,269**	**200,527**	**346,796**

[1] *Supply forecast produced by PGIBSA based on the South Australian vineyard register*

[2] *A raising factor of 1.021 has been applied to committed intake to allow for non-respondents*

State summary

Estimated supply and committed intake 2013 - 2017 (including ALL regions)

Variety	2013				2015				2017			
	Est Supply [1]	Committed intake [2]			Est Supply [1]	Committed intake [2]			Est Supply [1]	Committed intake [2]		
		Winery grapes	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*		*Winery grapes*	*Contract purchases*	*Total committed intake*
White winegrapes												
Canada Muscat	0	0	51	51	0	0	51	51	0	0	51	51
Chardonnay	150,610	28,943	100,862	129,805	151,463	26,329	83,023	109,352	151,463	26,329	77,667	103,995
Chenin Blanc	3,127	162	2,130	2,292	3,140	162	1,724	1,887	3,140	162	1,724	1,887
Colombard	21,596	2,932	26,480	29,411	21,617	2,880	24,963	27,843	21,617	2,880	24,627	27,507
Crouchen	0	94	50	144	0	94	50	144	0	94	50	144
Doradillo	2,036	29	124	152	2,036	29	124	152	2,036	29	124	152
Marsanne	240	134	73	207	240	134	74	208	240	134	74	208
Muscadelle	260	49	3	52	260	56	3	59	260	59	3	62
Muscat a Petit Grains Blanc	4,054	1,000	3,370	4,370	4,172	1,025	3,800	4,824	4,172	1,059	3,419	4,478
Muscat Gordo Blanco	26,252	505	24,686	25,191	26,629	605	21,179	21,784	26,629	605	20,645	21,250
Other White	10,504	568	1,581	2,149	11,113	674	1,671	2,345	11,113	694	1,471	2,164
Palomino	335	189	92	281	335	189	92	281	335	189	8	197
Pedro Ximenes	84	81	7	88	84	82	28	109	84	82	43	125
Pinot Gris	8,281	3,611	6,038	9,649	8,780	3,768	5,938	9,706	8,780	3,785	5,416	9,202
Riesling	25,180	10,621	9,368	19,989	25,283	10,714	7,331	18,045	25,283	10,735	5,416	16,151
Roussanne	154	85	50	135	164	85	66	151	164	85	66	151
Sauvignon Blanc	30,013	8,676	18,866	27,542	30,747	8,634	16,846	25,480	30,747	8,636	15,435	24,071
Semillon	19,163	4,013	6,463	10,476	19,273	3,976	4,893	8,869	19,273	3,929	4,142	8,071
Sultana	4,581	0	805	805	4,607	0	805	805	4,607	0	805	805
Taminga	0	0	120	120	0	0	120	120	0	0	120	120
Traminer	3,268	1,113	2,044	3,157	3,277	1,138	2,044	3,182	3,277	1,138	930	2,068
Verdelho	3,993	420	1,472	1,892	4,009	420	966	1,386	4,009	420	822	1,242
Viognier	5,790	1,102	2,519	3,621	5,846	1,108	2,144	3,252	5,846	1,109	1,886	2,995
Total white winegrapes	**320,026**	**64,326**	**207,252**	**271,578**	**323,582**	**62,102**	**177,933**	**240,036**	**323,582**	**62,154**	**164,941**	**227,095**
All winegrapes	**834,677**	**212,857**	**485,918**	**698,775**	**844,458**	**207,675**	**400,528**	**608,204**	**844,458**	**208,424**	**365,468**	**573,891**

[1] *Supply forecast produced by PGIBSA based on the South Australian vineyard register*

[2] *A raising factor of 1.021 has been applied to committed intake to allow for non-respondents*