Phylloxera and Grape Industry Board of SA

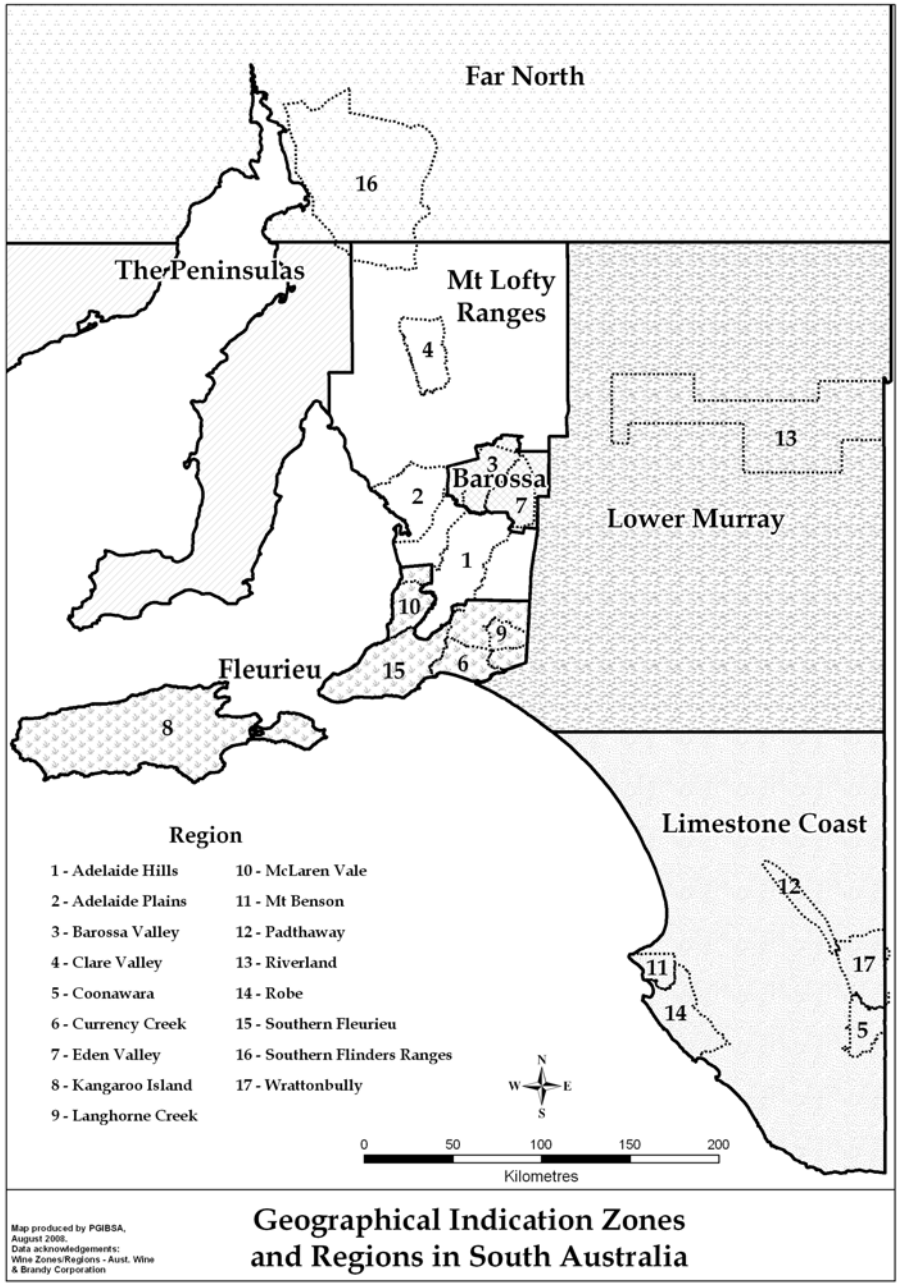
2008 South Australian Winegrape Utilisation and Pricing Survey

Funded by

South Australian Wine Industry Association

Wine Grape Council of SA Inc

Primary Industries And Resources SA



The South Australian Winegrape Utilisation and Pricing Survey

State summary report 2008

ACKNOWLEDGEMENTS

This survey has been produced by the Phylloxera and Grape Industry Board of South Australia on behalf of the **South Australian Wine Industry Association,** the **Wine Grape Council of SA Inc** and **Primary Industries and Resources SA,** who jointly fund the survey. Some additional funding is provided by the Grape and Wine Research and Development Corporation, as part of the National Utilisation and Pricing Survey project.

The publication of this survey is made possible through the support of the South Australian and interstate wineries who processed fruit from South Australian vineyards in 2008. The information is provided voluntarily by wineries on the understanding and assurance that information from individual wineries will be kept strictly confidential. Only aggregate responses are reported. Draft results are checked by regional industry representatives. Vintage reports have been provided by the regional representatives or their local committees. Particular thanks go to: Max Arney, Tom Ayers, Pete Balnaves, Peter Bird, Jim Caddy, Graham Kaye, Tom Keelan, Greg Koch, Robin Nettelbeck, Ali Phillips, Amy Richards, Alex Sas, David Watkins, Kirsty Waller and Graeme Wellman.

The survey publication is available on the Board's website www.phylloxera.com.au. The state summary and regional reports can be downloaded as PDF files. Previous reports (since 2000) are also available on the website, and hard copies of reports from previous years back to 1998 are available from the Board's office.

REPORT PREPARATION

Report prepared by Sandy Hathaway and Rachel Inness, Phylloxera and Grape Industry Board of SA.

MAPS

Maps of the GI regions produced by Martin Nolan, GIS Project Officer, Phylloxera and Grape Industry Board of SA.

COPYRIGHT

This work is copyright. Apart from any use permitted under the Copyright Act 1969, no part of this publication may be reproduced by any process without the prior written permission of the Phylloxera and Grape Industry Board of South Australia.

© Phylloxera and Grape Industry Board of South Australia, 2008.

ISSN 1442-6048

Date of publication: October 2008.

DISCLAIMER

While every effort is made to ensure the accuracy and integrity of the information reported in this document, no responsibility is taken for any errors or omissions. The Phylloxera and Grape Industry Board of South Australia expressly disclaims any liability for the accuracy and sufficiency of the information, and in no circumstances shall it be held liable for the consequences of decisions, actions, assumptions and interpretations made by those who use the information contained within the report.

DOCUMENT STRUCTURE AND LAYOUT

The full survey report incorporates 14 regional reports, covering the major declared GI regions in South Australia, and a state summary section with aggregate data, forecasts by variety and historical comparisons. The report may be downloaded in sections as a series of PDF files from the PGIBSA website www.phylloxera.com.au.

INTERPRETATION OF REPORT INFORMATION

Please refer to the **EXPLANATIONS AND DEFINITIONS** for definitions, limitations and interpretations of different statistics reported.

Explanations and Definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with declared or interim 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, Southern Flinders Ranges 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 who source fruit from South Australian vineyards are included in the survey collection process. Reported fruit is separated into fruit produced from the winery's own vineyards ("own grown") and from independent grower owned 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 by the Australian Bureau of Agriculture and Resource Economics (ABARE), on behalf of the wine industry, using the bearing area information collected by the Australian Bureau of Statistics in its annual vineyard survey. The supply forecasts do not make any allowance for large-scale grubbings, 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 in production forecasts between the wineries and ABARE. In this case, available supply is recorded as zero – rather than as a negative number.

Demand (required intake)

T**he demand figure** (required intake) is the tonnage required by wineries to achieve sales forecasts. Demand figures are no longer reported for individual regions, although they are collected on that basis. This is because, for the majority of fruit purchased, the requirement is not specifically regional – but rather it is price/quality based and therefore interchangeable at least to some extent between regions. Demand (fruit requirement) is reported for "warm" vs "cool" climate fruit (Riverland vs. the rest of South Australia) and for the whole of South Australia. Therefore it is important to read the state summary report in conjunction with the individual regional reports.

Note: not all wineries provide estimates of future intakes - particularly for the later forecast years. Therefore forecasts for later years tend to underreport actual demand. The projections of future intake should be interpreted and used cautiously. It should be noted that there is considerable variation from one survey to the next in demand projections for the same future forecast year, as marketing indications change. The projections should only be interpreted as general indications of current levels of confidence, and trends in varietal preferences.

Comparing supply and demand

In order to compare supply with demand and 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 ABS 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 2008 South Australian Utilisation and Pricing 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 2008 and include all plantings from the 2007 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 2008 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.

State summary

Overview of vintage statistics 2008

State and regional overview

The total crush of South Australian winegrapes in 2008 was 816,868 tonnes. This was 42% above the 2007 harvest, and was the fourth highest crush recorded for the state. Favourable growing conditions, purchasing of water and a mild February were the main factors that contributed to the harvesting of reasonable crops in most regions.

The Coonawarra harvest was up by more than 100% (compared with a very low 2007 vintage), while the Barossa and Eden Valleys, McLaren Vale and Langhorne Creek were all up by around 50% - 60%. The Riverland was up by 24% (75,000 tonnes).

The total estimated purchase value of the crush was $765 million, up by more than $300 million from last year. The average purchase value per tonne across the state was up, from $730 per tonne in 2007 to $936 per tonne. The average purchase values for the major variety of each region increased again, despite the higher production, with the exception of Coonawarra Cabernet Sauvignon.

Varietal overview

The red crush was 506,272 tonnes; the white crush was 310,596 tonnes. Red varieties were hit harder in 2007, and this year increased their share of the crush from 56% in 2007 to 68% - which is more in line with its proportion of plantings. Chardonnay decreased its share of total production back to 20%, while Shiraz reclaimed its crown as the dominant variety in South Australia, with 30% of the crush. Sauvignon Blanc further increased its contribution to the crush; it is now the third largest white variety – having overtaken Riesling, Semillon and Muscat Gordo Blanco for the first time. In 2003, the crush of both Riesling and Semillon was around 20,000 tonnes (they are now around 24,000 tonnes) while the crush of Sauvignon Blanc was less than 7,000 tonnes (in 2008 it was 27,600 tonnes).

Across all varieties, the proportion of purchased fruit was 75%, compared with 80% in 2007.

Vineyard plantings

Planting data derived from the Phylloxera and Grape Industry Board's vineyard register shows that there were 78,717 hectares planted to vines in South Australia as at 30 April 2008. This represents an increase of 2,339 hectares; however, area adjustments and new registrations account for some of the increase. There was a total of 973 hectares (1% of the total area) planted in spring 2007 (including topworking and replants as well as increases in net area). There were more new plantings of red than white varieties, for the first time since 2001. The major growth varieties proportionally were still Pinot Gris (89 hectares – 12% increase) and Sauvignon Blanc (181 ha – 8% increase).

There were a total of 3790 growers registered with the Board as at 30 April 2008. 2204 growers (58%) have properties smaller than 10 hectares and only account for 12% of the total vineyard area, while 123 growers (3%) have properties larger than 100 hectares (in the same region) and these account for 39% 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 industry estimated average yield figures. These supply projections are included in the survey report, together with the wineries' estimates of future demand and committed intake. The estimated production for 2009 for South Australia is around 840,000 tonnes – similar to the 2008 harvest. 870,000 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 810,000 tonnes.

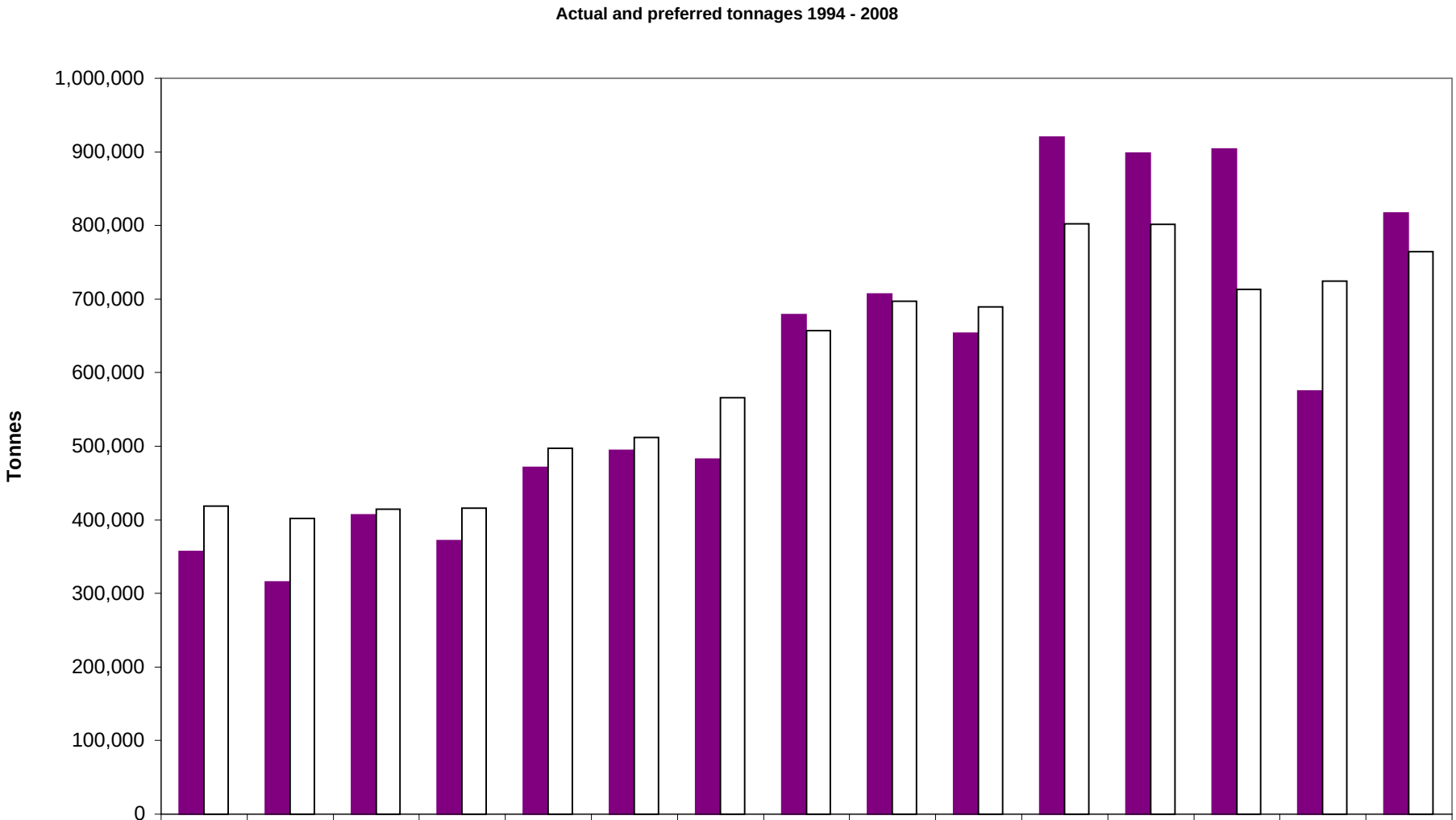
The ABARE estimated supply of grapes for South Australia in 2013 is around 920,000 tonnes. This estimate is based on the assumption of a return to "normal" growing conditions and does not take into account any residual effects of drought and water restrictions or industry restructuring initiatives. Considering 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 plantings or removals that occur in the next few years. This would result in another oversupply situation, as winery demand for 2013 as reported in the survey is only 880,000 tonnes, and may be reduced further as a result of recent events in the global economy. However, based on current projections of supply and demand, there would only be a very small (less than 5%) overall surplus of fruit.

The varieties likely to be most in demand, with significant shortfalls possible, are Sauvignon Blanc, Pinot Gris and Pinot Noir. There is even a small shortfall of Cabernet Sauvignon expected in 2013.

While the estimated production of Sauvignon Blanc and Pinot Gris may not be able to quite meet demand within five years, the rapid increases in plantings of these varieties suggests that there will be enough to fulfill demand. Much more planting could lead to an oversupply, as happened with Chardonnay a few years ago. However, there are no indications that Pinot Noir is being planted at above a minimal rate (2%), and the current area (1462 hectares) will not be nearly sufficient to meet the anticipated demand of 28,000 tonnes in 2013.

State summary

Historical production chart 1994 - 2008

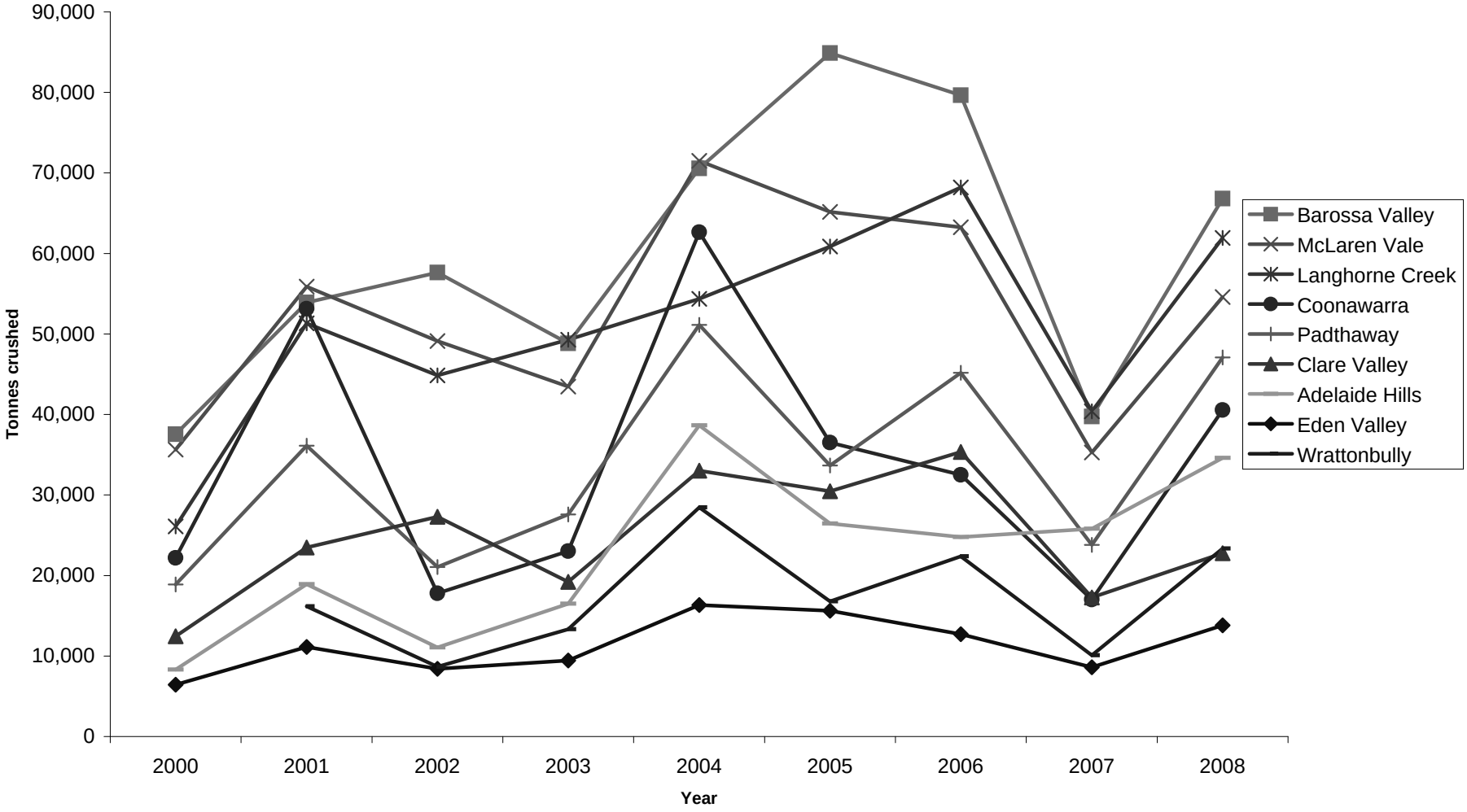


	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Actual usage	357217	315482	406387	371533	471313	494205	482157	678821	707151	653535	920194	898165	904022	575111	816868
Preferred usage	418983	401665	414101	416162	497349	511863	565750	657414	696920	689556	802236	801890	713096	724361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

State summary

Vintage by region 2000 - 2008

Not including the Riverland



State summary

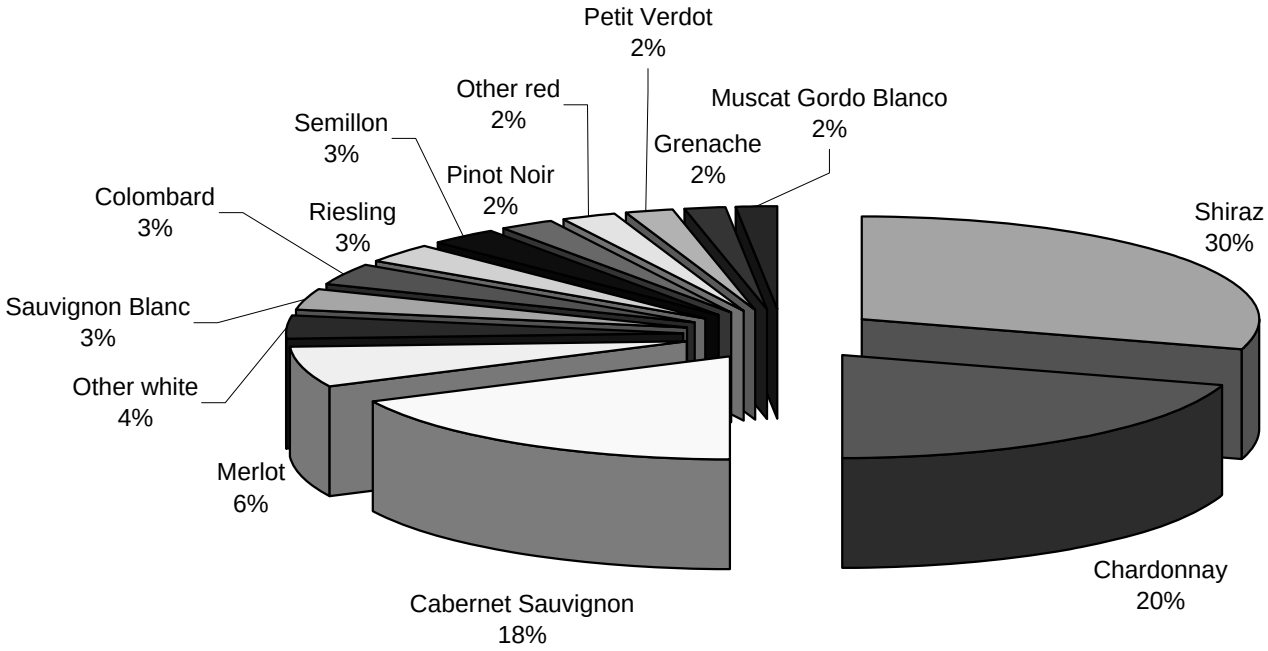
Vintage summary by variety 2008

Variety	Tonnes purchased	Winery grown fruit	Total crushed	% purchased	Est total value of crush
Red winegrapes					
Cabernet Franc	503	776	1,279	39%	$1,191,847
Cabernet Sauvignon	103,852	41,379	145,231	72%	$135,362,168
Grenache	10,674	3,311	13,985	76%	$13,105,192
Malbec	893	798	1,691	53%	$1,570,800
Mataro	4,306	703	5,008	86%	$3,909,885
Merlot	34,569	16,170	50,739	68%	$39,876,585
Meunier	431	125	556	78%	$949,012
Petit Verdot	8,934	7,289	16,224	55%	$8,837,892
Pinot Noir	15,653	3,849	19,503	80%	$23,040,013
Ruby Cabernet	2,157	947	3,104	69%	$1,305,720
Sangiovese	1,123	711	1,834	61%	$1,880,060
Shiraz	187,103	56,172	243,275	77%	$262,897,158
Tempranillo	927	285	1,212	77%	$1,582,343
Other red	1,812	819	2,631	69%	2,182,989
Total red winegrapes	**372,938**	**133,334**	**506,272**	**74%**	**$497,691,665**
% of grand total	*61%*	*65%*	*62%*		*68%*
White winegrapes					
Chardonnay	130,883	34,841	165,724	79%	$113,506,722
Chenin Blanc	3,758	126	3,884	97%	$1,829,920
Colombard	25,120	1,416	26,537	95%	$11,453,276
Muscat a Petit Grains Blanc	1,874	412	2,286	82%	$1,321,594
Muscat Gordo Blanco	12,017	600	12,618	95%	$6,709,526
Pinot Gris	3,239	1,729	4,969	65%	$8,142,210
Riesling	14,253	10,716	24,970	57%	$26,451,119
Sauvignon Blanc	18,570	9,061	27,631	67%	$34,684,132
Semillon	15,370	7,667	23,037	67%	$15,834,178
Traminer	2,004	1,759	3,763	53%	$2,800,428
Verdelho	3,313	1,637	4,951	67%	$3,374,922
Viognier	4,017	896	4,913	82%	$5,700,245
Other white	3,861	1,455	5,315	73%	2,618,626
Total white winegrapes	**238,282**	**72,315**	**310,596**	**77%**	**$234,426,897**
% of grand total	*39%*	*35%*	*38%*		*32%*
Total all winegrapes	**611,220**	**205,648**	**816,868**	**75%**	**$732,118,562**

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

State summary

Vintage summary by variety 2008



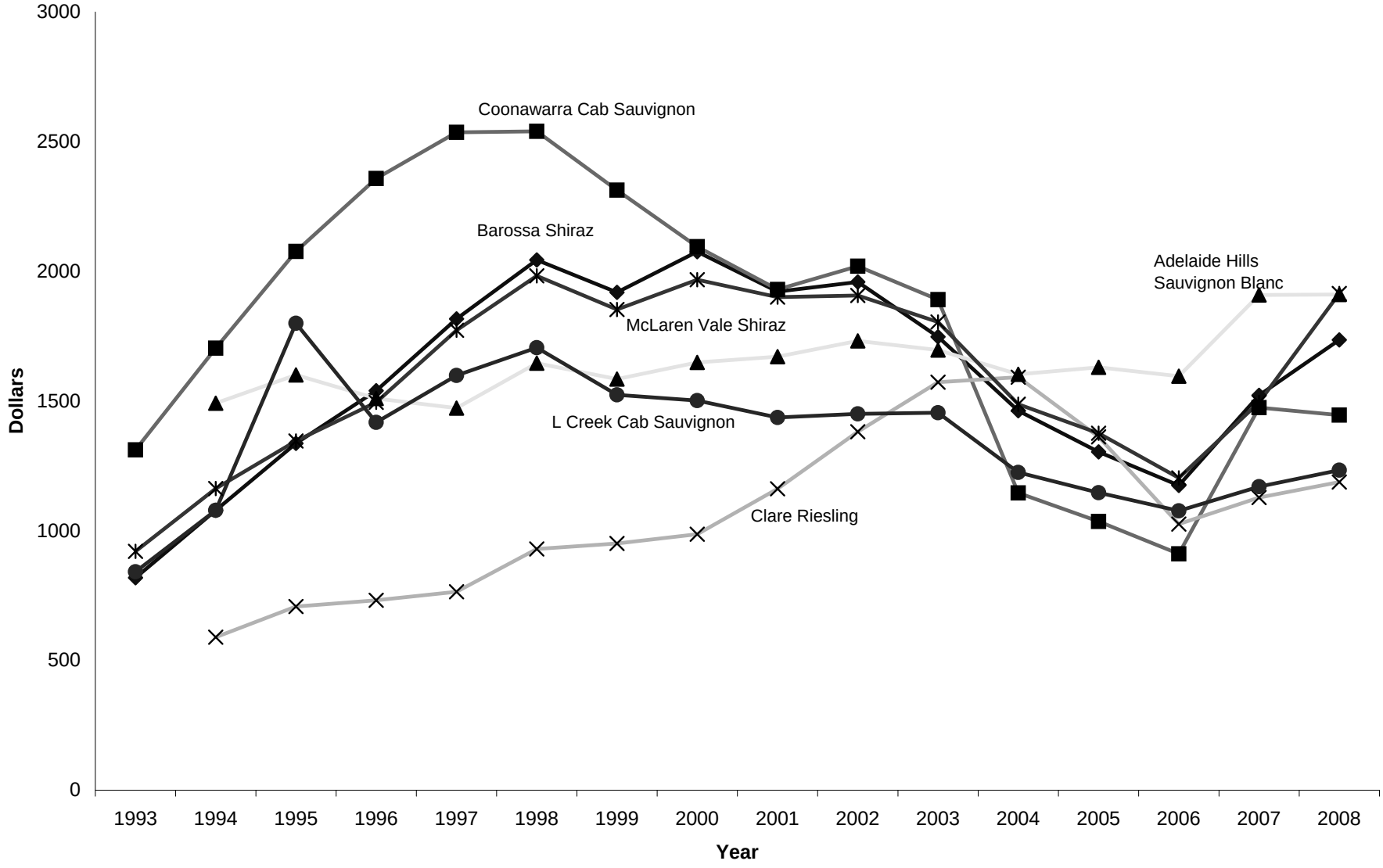
State summary

Total crush by GI region 2008 vs 2007

GI region	*Winery grown (tonnes)*	*Purchased (tonnes)*	*Total crushed 2008*	*% of state crush*	*Total crush 2007*	*% difference 2008 vs 2007*
Adelaide Hills	6577	28040	34618	*4%*	25792	*34%*
Adelaide Plains	435	6056	6492	*1%*	4964	*31%*
Barossa Valley	11643	50548	62191	*8%*	39707	*57%*
Barossa zone - other	523	4102	4625	*1%*	24	*19170%*
Clare Valley	10160	12605	22765	*3%*	17258	*32%*
Coonawarra	22807	17745	40552	*5%*	17026	*138%*
Currency Creek	2772	4456	7228	*1%*	6483	*11%*
Eden Valley	6442	7355	13797	*2%*	8607	*60%*
Fleurieu zone - other	1468	3071	4538	*1%*	2061	*120%*
Kangaroo Island	222	39	261	*0%*	125	*109%*
Langhorne Creek	15307	46637	61944	*8%*	40393	*53%*
Limestone Coast zone - other	7731	10376	18107	*2%*	11866	*53%*
Lower Murray zone - other	0	1419	1419	*0%*	1786	*-21%*
McLaren Vale	21520	33082	54602	*7%*	35293	*55%*
Mount Benson	925	2498	3423	*0%*	2559	*34%*
Mount Lofty Ranges zone - other	175	1489	1664	*0%*	812	*105%*
Padthaway	26916	20172	47087	*6%*	23787	*98%*
Riverland	56939	344362	401300	*49%*	323171	*24%*
Robe	1840	1540	3380	*0%*	382	*785%*
Southern Fleurieu	100	2563	2663	*0%*	1483	*80%*
Southern Flinders Ranges	45	789	834	*0%*	1277	*-35%*
The Peninsulas	35	0	35	*0%*	158	*-78%*
Wrattonbully	11065	12277	23342	*3%*	10096	*131%*
Total all regions	**205648**	**611220**	**816868**	***100%***	**575111**	***42%***

State summary

Selected historical WAPs by region



State summary

Vintage summary by region 2008

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Adelaide Hills	Red	1,627	10,167	11,794	$16,478,624	$19,130,804
	White	4,950	17,874	22,824	$29,019,782	$37,642,675
	All	6,577	28,040	34,618	$45,498,406	$56,773,479
Adelaide Plains	Red	199	3,282	3,481	$3,175,096	$3,372,180
	White	237	2,774	3,011	$2,577,954	$2,764,087
	All	435	6,056	6,492	$5,753,050	$6,136,267
Barossa Valley	Red	8,708	39,172	47,880	$61,465,841	$74,921,928
** inc Barossa Zone - other*	White	3,458	15,478	18,936	$12,914,991	$15,868,470
	All	12,166	54,649	66,816	$74,380,832	$90,790,398
Clare Valley	Red	6,069	6,626	12,696	$9,533,958	$17,945,862
	White	4,090	5,979	10,069	$6,992,922	$11,713,760
	All	10,160	12,605	22,765	$16,526,881	$29,659,622
Coonawarra	Red	18,796	16,033	34,829	$22,016,306	$47,729,182
	White	4,011	1,712	5,723	$1,751,707	$5,777,700
	All	22,807	17,745	40,552	$23,768,012	$53,506,882
Currency Creek	Red	1,074	4,161	5,234	$4,292,383	$5,400,201
	White	1,698	295	1,993	$341,833	$2,151,261
	All	2,772	4,456	7,228	$4,634,217	$7,551,461
Eden Valley	Red	2,407	3,444	5,851	$5,363,361	$8,979,968
	White	4,035	3,911	7,946	$5,256,821	$10,809,970
	All	6,442	7,355	13,797	$10,620,182	$19,789,937
Fleurieu zone - other	Red	1,374	3,764	5,138	$4,517,037	$6,138,939
	White	416	1,909	2,325	$2,311,394	$2,824,998
	All	1,790	5,673	7,463	$6,828,431	$8,963,938

State summary

Vintage summary by region 2008

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Langhorne Creek	Red	10,885	34,259	45,144	$38,396,778	$50,362,992
	White	4,422	12,379	16,800	$11,069,808	$15,254,934
	All	15,307	46,637	61,944	$49,466,586	$65,617,926
Limestone Coast zone - other	Red	8,871	11,529	20,399	$13,407,953	$23,399,375
** inc Bordertown*	White	1,626	2,885	4,511	$2,834,361	$4,369,170
	All	10,496	14,414	24,911	$16,242,314	$27,768,545
McLaren Vale	Red	16,825	26,508	43,333	$46,623,933	$75,189,755
	White	4,695	6,574	11,268	$7,238,960	$12,407,372
	All	21,520	33,082	54,602	$53,862,893	$87,597,128
Padthaway	Red	13,893	10,262	24,155	$11,900,446	$28,300,466
	White	13,023	9,910	22,933	$8,236,429	$18,646,834
	All	26,916	20,172	47,087	$20,136,875	$46,947,300
Riverland	Red	32,937	190,475	223,413	$116,321,840	$135,578,977
	White	24,001	153,886	177,887	$81,036,788	$93,882,498
	All	56,939	344,362	401,300	$197,358,628	$229,461,475
SA - other	Red	236	2,925	3,160	$3,159,906	$3,401,021
	White	20	772	792	$520,728	$535,936
	All	255	3,697	3,952	$3,680,634	$3,936,957
Wrattonbully	Red	9,431	10,333	19,765	$14,100,503	$26,858,574
	White	1,634	1,944	3,578	$1,879,308	$3,627,320
	All	11,065	12,277	23,342	$15,979,810	$30,485,894
All regions		**205,648**	**611,220**	**816,868**	**$544,737,751**	**$764,987,210**

State summary Current plantings by variety and year planted

Variety	Current area in hectares					
	Pre-2005	*2005*	*2006*	*2007*	*Total area*	*% planted in 2007*
Red winegrapes						
Alicante Bouschet	11	2	0	0	13	*0%*
Barbera	24	1	0	1	26	*4%*
Cabernet Franc	199	0	0	1	200	*0%*
Cabernet Sauvignon	16955	29	57	60	17101	*0%*
Carignan	21	0	0	0	21	*0%*
Dolcetto	8	9	4	0	21	*0%*
Durif	24	5	0	6	34	*17%*
Grenache	1835	21	3	5	1865	*0%*
Lagrein	3	12	1	0	17	*0%*
Malbec	253	1	1	2	257	*1%*
Mataro (Mourvedre)	629	8	9	11	657	*2%*
Merlot	4447	51	38	14	4551	*0%*
Meunier (Pinot Meunier)	40	0	0	0	40	*0%*
Nebbiolo	51	1	0	3	55	*5%*
Other red	55	11	5	8	79	*10%*
Petit Verdot	875	1	1	0	877	*0%*
Pinot Noir	1390	12	24	36	1462	*2%*
Rubired	11	3	0	0	14	*0%*
Ruby Cabernet	346	0	0	0	346	*0%*
Sangiovese	213	4	1	1	220	*1%*
Shiraz	24128	443	387	353	25311	*1%*
Tarrango	22	0	0	0	22	*0%*
Tempranillo	145	4	6	10	165	*6%*
Tinta Madiera (Molle)	14	0	0	0	14	*0%*
Touriga	29	0	0	0	29	*0%*
Zinfandel	37	2	0	1	40	*2%*
Total red varieties	**51766**	**618**	**540**	**512**	**53436**	***1%***

State summary Current plantings by variety and year planted

Variety	Current area in hectares					
	Pre-2005	*2005*	*2006*	*2007*	*Total area*	*% planted in 2007*
White winegrapes						
Albarino	2	0	7	18	28	*64%*
Chardonnay	10938	304	108	60	11410	*1%*
Chenin Blanc	228	0	0	0	228	*0%*
Colombard	953	13	15	0	981	*0%*
Crouchen	21	0	0	0	21	*0%*
Cygne Blanc	22	0	4	0	26	*0%*
Doradillo	129	0	0	0	129	*0%*
Marsanne	25	0	4	0	29	*0%*
Muscadelle (Tokay)	46	0	0	0	46	*0%*
Muscat A Petit Grains Blanc (Frontignac)	133	8	32	5	178	*3%*
Muscat Gordo Blanco	1042	54	89	21	1206	*2%*
Other white	50	4	5	2	62	*4%*
Palomino	63	0	0	0	63	*0%*
Pedro Ximenes	35	0	0	0	35	*0%*
Pinot Gris	251	100	289	89	729	*12%*
Riesling	3217	65	42	29	3353	*1%*
Roussanne	12	3	2	1	18	*5%*
Sauvignon Blanc	1733	209	222	181	2345	*8%*
Semillon	1646	8	15	15	1684	*1%*
Sultana	343	2	1	0	346	*0%*
Sylvaner	38	0	0	0	38	*0%*
Traminer	253	5	9	0	267	*0%*
Trebbiano	32	0	0	0	32	*0%*
Verdelho	291	6	8	0	305	*0%*
Viognier	422	100	42	40	602	*7%*
Total white varieties	**21925**	**879**	**895**	**461**	**24161**	***2%***
Other varieties						
Unknown variety	862	0	0	0	862	*0%*
Rootstock Block	31	12	0	0	43	*0%*
Carina	30	10	10	0	50	*0%*
Waltham Cross	37	0	0	0	37	*0%*
Zante Currant	54	0	1	0	55	*0%*
Tablegrapes - red	46	0	0	0	46	*0%*
Tablegrapes - white	26	0	0	0	26	*0%*
Total all varieties	**74777**	**1520**	**1446**	**973**	**78717**	***1%***

State summary Current plantings in SA by GI region and year planted

		Current area in hectares by year planted						
Zone	**Region**	*Pre-2005*	*2005*	*2006*	*2007*	*Total*	*% planted in 2007*	*% of state plantings*
Mount Lofty Ranges	Adelaide Hills	3559	138	138	77	3912	*2%*	*5%*
	Adelaide Plains	744	0	16	2	762	*0%*	*1%*
	Clare Valley	5442	57	66	93	5658	*2%*	*7%*
	Mount Lofty Ranges Zone - Other	366	2	6	1	375	*0%*	*0%*
	Total for Mount Lofty Ranges	10112	197	225	173	10706	*2%*	*14%*
Barossa	Barossa Valley	10146	367	233	292	11037	*3%*	*14%*
	Barossa Zone - Other	106	0	0	0	106	*0%*	*0%*
	Eden Valley	2186	33	23	26	2268	*1%*	*3%*
	Total for Barossa	12437	400	256	318	13411	*2%*	*17%*
Fleurieu	Currency Creek	915	13	24	4	956	*0%*	*1%*
	Fleurieu Zone - Other	171	0	0	30	201	*15%*	*0%*
	Kangaroo Island	137	0	0	2	139	*1%*	*0%*
	Langhorne Creek	5929	130	113	5	6177	*0%*	*8%*
	Mclaren Vale	7191	67	84	70	7412	*1%*	*9%*
	Southern Fleurieu	503	4	32	12	551	*2%*	*1%*
	Total for Fleurieu	14846	213	253	125	15436	*1%*	*20%*
Limestone Coast	Bordertown	1251	13	11	0	1274	*0%*	*2%*
	Coonawarra	5847	9	8	28	5891	*0%*	*7%*
	Limestone Coast Zone - Other	723	41	1	0	765	*0%*	*1%*
	Mount Benson	509	3	13	12	537	*2%*	*1%*
	Padthaway	4006	66	94	3	4169	*0%*	*5%*
	Robe	686	20	35	0	741	*0%*	*1%*
	Wrattonbully	2499	25	126	12	2661	*0%*	*3%*
	Total for Limestone Coast	15520	176	288	54	16038	*0%*	*20%*
Lower Murray	Riverland	21212	533	418	291	22454	*1%*	*29%*
	Lower Murray Zone - Other	451	1	7	12	471	*2%*	*1%*
	Total for Lower Murray	21664	534	425	303	22925	*1%*	*29%*
The Peninsulas		33	0	0	1	34	*3%*	*0%*
Far North	Southern Flinders Ranges	166	0	0	0	166	*0%*	*0%*
Whole state	**Total for All GIs**	**74777**	**1520**	**1446**	**973**	**78717**	***1%***	***100%***

State summary Number of growers by region and property size 2008

	Property size in hectares											
	< 10 ha		*10 - 24 ha*		*25 - 49 ha*		*50 - 99 ha*		*100+ ha*		***Total***	
GI region	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*
Mount Lofty Ranges												
Adelaide Hills	201	777	12	798	64	1085	30	1030	2	222	309	3912
Adelaide Plains	53	172	3	181	11	148	2	92	1	168	70	762
Clare Valley	177	745	12	850	57	930	20	670	10	2463	276	5657
Mount Lofty Ranges Zone - Other	30	94	1	91	3	51	4	139			38	375
Barossa												
Barossa Valley	342	1439	22	1421	167	2674	71	2345	12	3136	614	11014
Eden Valley	87	371	7	543	30	453	10	326	2	573	136	2265
Barossa Zone - Other	3	8	1	84	1	14					5	106
Fleurieu												
Currency Creek	11	65			11	162	5	191	2	537	29	956
Kangaroo Island	19	105			3	34					22	139
Langhorne Creek	20	101	17	1244	25	413	26	917	14	3502	102	6177
Mclaren Vale	346	1447	22	1522	100	1600	45	1463	6	1382	519	7415
Southern Fleurieu	37	120	1	68	8	101	7	262			53	551
Fleurieu Zone - Other	9	26	1	93	3	43	1	39			14	201
Limestone Coast												
Bordertown							1	43	4	1231	5	1274
Coonawarra	53	279	16	1076	36	541	17	575	12	3420	134	5891
Mount Benson	5	38	2	115	4	62	6	201	1	121	18	537
Padthaway	2	11	6	414	4	48	8	273	10	3423	30	4169
Robe	1	8	1	54	4	65	2	81	3	533	11	741
Wrattonbully	11	60	6	430	22	380	11	398	6	1393	56	2661
Limestone Coast Zone - Other	31	126	2	109	5	70	3	89	3	372	44	765
Lower Murray												
Riverland	736	3681	28	1988	351	5308	100	3374	35	8105	1250	22456
Lower Murray Zone - Other	16	73			8	126	9	271			33	471
Southern Flinders Ranges	10	42			5	92	1	32			16	166
The Peninsulas	4	13			2	21					6	34
Grand Total	**2204**	**9802**	**160**	**11079**	**924**	**14422**	**379**	**12812**	**123**	**30579**	**3790**	**78695**

A slight variation between this and the previous table is a result of data being extracted from the database at slightly different times.

State summary Supply and demand for grapes in South Australia 2009 - 2013

Variety	Year	Est Supply [1]	Winery grown grapes [2]	Contract purchases [2]	Total committed intake [3]	Total requirement (Demand)	Net surplus/ shortfall [4]	Fruit available on the open market [5]	Supply minus demand [6]
White winegrapes									
Chardonnay	2009	164,254	37,035	141,549	178,584	131,639	-14,330	0	32,615
	2011	179,644	37,002	122,209	159,211	138,047	20,432	20,432	41,597
	2013	184,590	36,032	98,061	134,093	142,498	42,092	50,497	42,092
Pinot Gris	2009	3,675	2,162	3,778	5,940	9,454	-5,780	0	-5,780
	2011	5,508	2,762	4,513	7,274	12,173	-6,665	0	-6,665
	2013	8,358	2,835	4,153	6,988	12,286	-3,929	1,370	-3,929
Riesling	2009	27,279	13,741	14,972	28,713	21,846	-1,434	0	5,433
	2011	28,960	14,111	12,316	26,427	22,816	2,533	2,533	6,144
	2013	29,661	14,056	9,773	23,829	23,205	5,832	5,832	6,457
Sauvignon Blanc	2009	19,606	9,342	20,462	29,805	34,059	-14,453	0	-14,453
	2011	24,002	10,149	22,561	32,709	37,113	-13,112	0	-13,112
	2013	27,219	10,449	19,639	30,088	37,887	-10,669	0	-10,669
Semillon	2009	21,467	7,931	16,031	23,962	23,307	-2,495	0	-1,841
	2011	25,655	7,907	13,990	21,897	25,196	459	3,758	459
	2013	26,715	7,899	11,264	19,163	26,277	438	7,552	438
All other white varieties	2009	64,372	10,058	72,792	82,850	74,762	-18,478	0	-10,389
	2011	87,505	9,915	71,087	81,003	78,591	6,502	6,502	8,914
	2013	94,229	10,413	63,186	73,599	79,940	14,289	20,629	14,289
Total white winegrapes	**2009**	**300,653**	**80,269**	**269,584**	**349,853**	**295,067**	**-49,200**	**0**	**5,586**
	2011	**351,274**	**81,846**	**246,676**	**328,522**	**313,936**	**22,751**	**22,751**	**37,338**
	2013	**370,772**	**81,684**	**206,077**	**287,761**	**322,094**	**48,679**	**83,012**	**48,679**

Notes

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

[2] *A raising factor of 1.042 has been applied to allow for non-respondents*

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

[4] *Difference between supply and either committed intake or demand - whichever is higher.*

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

[6] *A negative number indicates a shortfall - ie demand is higher than supply.*

State summary Supply and demand for grapes in South Australia 2009 - 2013

Variety	Year	Est Supply [1]	Winery grown grapes [2]	Contract purchases [2]	Total committed intake [3]	Total requirement (Demand)	Net surplus/ shortfall [4]	Fruit available on the open market [5]	Supply minus demand [6]
Red winegrapes									
Cabernet Sauvignon	2009	170,113	52,368	110,218	162,586	167,332	2,781	7,526	2,781
	2011	159,085	52,578	88,027	140,605	171,260	-12,175	18,480	-12,175
	2013	160,332	52,649	70,631	123,280	173,860	-13,528	37,052	-13,528
Grenache	2009	17,497	4,005	11,036	15,041	16,702	796	2,456	796
	2011	17,901	4,125	9,798	13,923	17,560	342	3,978	342
	2013	18,251	4,081	7,744	11,825	18,397	-147	6,426	-147
Merlot	2009	58,580	19,060	33,008	52,068	48,644	6,512	6,512	9,935
	2011	60,634	19,203	28,190	47,393	51,765	8,869	13,241	8,869
	2013	61,257	19,003	21,746	40,749	53,525	7,732	20,508	7,732
Pinot Noir	2009	14,891	4,306	12,777	17,083	23,968	-9,077	0	-9,077
	2011	17,094	4,350	10,100	14,450	26,663	-9,569	2,644	-9,569
	2013	17,675	4,399	8,317	12,716	27,991	-10,316	4,959	-10,316
Shiraz	2009	248,382	63,283	180,748	244,030	234,172	4,352	4,352	14,209
	2011	248,770	62,424	150,398	212,822	249,179	-409	35,949	-409
	2013	256,139	63,008	123,176	186,183	254,844	1,295	69,956	1,295
All other red varieties	2009	32,434	11,497	18,613	30,110	25,475	2,324	2,324	6,958
	2011	39,061	11,668	16,631	28,299	27,881	10,762	10,762	11,181
	2013	40,115	11,730	14,157	25,887	28,135	11,981	14,228	11,981
Total red winegrapes	**2009**	**541,896**	**154,519**	**366,400**	**520,919**	**516,294**	**20,978**	**20,978**	**25,602**
	2011	**542,546**	**154,349**	**303,144**	**457,492**	**544,308**	**-1,762**	**85,053**	**-1,762**
	2013	**553,769**	**154,869**	**245,771**	**400,640**	**556,752**	**-2,983**	**153,129**	**-2,983**
All winegrapes	**2009**	**842,550**	**234,787**	**635,984**	**870,772**	**811,361**	**-28,222**	**0**	**31,188**
	2011	**893,819**	**236,195**	**549,820**	**786,015**	**858,243**	**35,576**	**107,805**	**35,576**
	2013	**924,542**	**236,553**	**451,848**	**688,401**	**878,846**	**45,696**	**236,141**	**45,696**

Notes

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

[2] *A raising factor of 1.042 has been applied to allow for non-respondents*

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

[4] *Difference between supply and either committed intake or demand - whichever is higher.*

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

[6] *A negative number indicates a shortfall - ie demand is higher than supply.*

State Summary

Estimated supply and fruit availability 2009 - 2013 (cool climate regions outside the Riverland)

Variety	2009				2011				2013			
	Est Supply[1]	Total committed intake[2]		Available supply[3]	Est Supply[1]	Total committed intake[2]		Available supply[3]	Est Supply[1]	Total committed intake[2]		Available supply[3]
		Winery grapes	Contract purchases			Winery grapes	Contract purchases			Winery grapes	Contract purchases	
Red winegrapes												
Cabernet Franc	2,129	866	499	764	2,195	858	280	1,058	2,195	865	222	1,108
Cabernet Sauvignon	115,309	44,325	51,902	19,082	101,157	44,418	32,484	24,255	101,862	44,262	18,769	38,831
Grenache	11,063	3,414	6,449	1,201	10,218	3,537	5,684	998	10,426	3,491	4,452	2,483
Malbec	1,490	677	651	162	1,562	685	628	249	1,608	689	544	375
Mataro	2,982	823	1,173	986	3,109	904	1,277	928	3,223	898	1,153	1,172
Merlot	38,538	11,931	15,069	11,538	37,455	11,896	10,718	14,841	37,682	11,670	7,309	18,703
Other red	3,670	873	1,435	1,362	3,990	938	1,380	1,672	4,326	991	1,308	2,027
Petit Verdot	3,804	1,010	1,014	1,780	3,594	1,007	836	1,751	3,604	1,007	597	2,000
Pinot Noir	9,711	4,120	6,350	0	11,151	4,165	4,248	2,738	11,358	4,215	2,530	4,613
Sangiovese	1,507	457	727	322	1,492	490	373	628	1,511	495	311	705
Shiraz	160,987	51,038	84,766	25,183	147,332	50,161	62,910	34,261	152,572	50,757	44,796	57,018
Total red winegrapes	**351,191**	**119,535**	**170,036**	**61,621**	**323,254**	**119,058**	**120,818**	**83,378**	**330,367**	**119,340**	**81,991**	**129,035**
White winegrapes												
Chardonnay	66,291	24,462	35,388	6,441	65,602	24,657	25,208	15,737	66,435	23,667	14,314	28,455
Chenin Blanc	564	127	354	84	630	138	342	150	694	138	342	215
Colombard	561	192	170	199	583	192	170	221	583	192	170	221
Muscat a Petit Grains Blanc	606	312	302	0	539	318	334	0	549	371	328	0
Other white	1,556	494	487	575	1,667	469	468	730	1,847	488	466	893
Pinot Gris	3,577	2,143	3,283	0	5,034	2,522	4,046	0	7,576	2,559	3,711	1,306
Riesling	23,552	13,311	12,758	0	24,337	13,455	10,046	836	24,728	13,399	7,484	3,845
Sauvignon Blanc	14,751	6,667	11,160	0	16,298	7,112	10,362	0	17,896	7,366	8,348	2,182
Semillon	14,080	3,169	9,515	1,395	14,059	3,145	8,267	2,648	14,160	3,136	6,418	4,606
Traminer	1,267	763	677	0	1,243	766	477	1	1,350	771	168	411
Verdelho	1,767	709	741	0	1,839	688	629	522	1,973	688	553	732
Viognier	2,885	763	2,451	0	2,838	791	2,467	0	3,083	791	2,279	12
Total white winegrapes	**131,458**	**53,111**	**77,287**	**1,061**	**134,670**	**54,253**	**62,815**	**17,602**	**140,874**	**53,566**	**44,581**	**42,727**
Total all winegrapes	**482,650**	**172,646**	**247,322**	**62,682**	**457,924**	**173,312**	**183,632**	**100,980**	**471,241**	**172,906**	**126,572**	**171,763**

[1] *Supply forecast produced by ABARE based on the ABS Vineyard Survey 2007*

[2] *A raising factor of 1.064 has been applied to committed intake to allow for non-respondents*

[3] *Where total committed intake is greater than estimated supply, the available supply is recorded as zero.*