2004 South Australian Winegrape Utilisation & Pricing Survey

Phylloxera and Grape Industry Board of South Australia
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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 2004. 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: Tom Ayres, Peter Bird, Andrew Bryson, Alan Dean, Peter Freckleton, Ross Heinze, David Lloyd, Bruce Rowe, Alex Sass, Peter Stephens and Graeme Wellman.

The survey publication is available on the Board’s website www.phylloxera.com.au. The entire report, or individual regions, can be downloaded as PDF files. The 2001, 2002 and 2003 reports are also available on the website, and hard copies of reports from previous years are available from the Board’s office.

COVER IMAGE

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REPORT PREPARATION

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INTERPRETATION OF REPORT INFORMATION

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

DOCUMENT STRUCTURE AND LAYOUT

The survey report has been structured in two parts. There is a state summary section at the front, followed by a separate section for each region, containing planting data, vintage statistics and projections. Regions are presented in alphabetical order.
# Table of contents

- Explanations and definitions ................................................................. 2
- State summary .................................................................................. 5
- Adelaide Hills regional summary ....................................................... 22
- Adelaide Plains regional summary ................................................... 28
- Barossa Valley regional summary ....................................................... 34
- Clare Valley regional summary .......................................................... 42
- Coonawarra regional summary ........................................................... 48
- Eden Valley regional summary ............................................................ 54
- Fleurieu zone (other) regional summary ............................................. 60
- Langhorne Creek regional summary .................................................. 66
- Limestone Coast zone (other) regional summary ............................... 72
- McLaren Vale regional summary ......................................................... 76
- Padthaway regional summary ............................................................. 82
- Riverland regional summary .............................................................. 88
- Wrattonbully regional summary .......................................................... 98
**Explanations and definitions**

**TONNAGE 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 relevant GI zone is used instead. 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 there was a shortfall.

**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**

*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.

*Total purchase value*

The **total purchase value** 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) 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 the average amount paid per tonne of fruit across all wineries. 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. The estimated value of total grapes is calculated by multiplying the average value per tonne by the total tonnes crushed.*

*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.*

*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.
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. This includes winery grown and purchased fruit.

The preferred tonnage is the tonnage required by wineries to achieve sales forecasts.

Where the preferred tonnage is higher than the estimated, a shortfall in supply is indicated. However, this does not necessarily mean a requirement for more planting. It may be that the shortfall can be met with fruit from another region, or uncontracted fruit not included in the estimated intake figures (provided it meets quality and price requirements).

Projected intake is not the same as production. The projections should be interpreted and used cautiously and should not be relied upon in making decisions about future production. It should be noted that there is considerable variation from one survey to the next in projections for the same future forecast year.

Reliability of forecasts

Not all wineries provide estimates of future intakes - particularly for the later forecast years. Therefore forecasts for later years tend to underreport actual demand. Since 2003 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 by reporting wineries.

PLANTING DATA

Derivation of planting data tables

Planting data is not derived from the 2004 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 record current plantings, by year planted. Information is current as at April 2004 and includes all plantings up to the 2003 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 earlier years may be different in the 2004 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.
WINEGRAPE UTILISATION AND PRICING SURVEY 2004

State summary

OVERVIEW OF VINTAGE STATISTICS 2004

State and regional overview

The total crush of South Australian winegrapes in 2004 was a massive 920,194 tonnes. This was a 41% increase on last year’s drought-affected harvest of 653,535 tonnes, and 30% more than the previous record harvest of 707,151 tonnes in 2002 (table 1.1). This was in spite of widespread crop thinning – particularly in red varieties.

There was increased production in all regions – the result of a combination of good growing conditions, excellent flowering and fruitset and some further increases in bearing area. The Adelaide Hills, Wattonbully and Coonawarra all more than doubled their production – with Coonawarra increasing by nearly 200% to 62,651 tonnes. This was more than any region except the Riverland crushed in 2003. There were more moderate increases in the other regions, especially the Riverland (19% increase) and Langhorne Creek (10% increase). See figure 1.1.

Variatel overview

The red crush was 622,486 tonnes; the white crush was 297,708 tonnes. Red varieties accounted for 68% of the crush – the same as last year. Not surprisingly, there was an overall surplus of red varieties (23%). There were moderate surpluses in most of the major varieties: Grenache, Merlot, Pinot Noir and Shiraz, and a larger (33%) surplus in Cabernet Sauvignon. Once again there was a substantial (more than 100%) surplus in Ruby Cabernet. Shiraz accounted for 43% of the red crush, Cabernet Sauvignon for 33% and Merlot was a distant third at 9% (figure 1.2).

Despite the increased tonnages, the actual and preferred tonnages for white varieties were exactly in balance (table 1.3). Chardonnay accounted for 46% of the white crush, with Colombard and Semillon next (10% each) – overtaking Muscat Gordo Blanco. Chardonnay increased its share again from 44% in 2003 and 41% in 2002 (figure 1.3).

The total estimated purchase value of the crush at point of receival was $818 million, up by nearly $200 million (29%) compared with 2003. This means that growers’ income in generally was substantially increased, despite a drop in the average purchase value per tonne. This decreased again from $907 in 2003, and $940 in 2002, to $889 per tonne in 2004. The decrease this year is principally attributable to lower prices paid on average for fruit at point of receival. It is consistent with the very large vintage, and the change in market demand for fruit, driven by the export market to the US.

Source of fruit

Winery grown fruit accounted for 24% of the crush overall in 2004, compared with 23% in 2003, 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 (62%) and the Adelaide Plains having the smallest (6%) (table 1.4). The percentage of winery grown fruit is projected to increase slightly to around 26% 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 intake

Projected intake for red varieties over the five year forecast period is expected to stabilise at around 600,000 tonnes, with estimated being greater than preferred intake in each year. The oversupply decreases from 85,000 tonnes (14%) in 2005 to 30,000 tonnes (5%) by 2009 (table 1.6). This means that, overall, wineries have commitments to take in more red varieties than they would prefer to take, based on current estimates of their future market requirements. Intake of white varieties is forecast to grow to a maximum of 354,000 tonnes in 2007 and then decline slightly to 346,000 tonnes in 2009, at which time estimated and preferred intake are in balance.

It should be noted that “estimated intake” is not the same as production. See table 1.9 for an estimate of the future production for each region, compared with wineries’ proposed future intake. It should also be noted that the forecast intake figures reflect wineries’ current thinking on market requirements, and can change substantially from year to year depending on market activity and other factors. They should not be interpreted as an accurate indication of intake tonnages in five years’ time.

Vineyard plantings

Planting data derived from the Phylloxera and Grape Industry Board’s vineyard register shows that there were 69,827 hectares planted to vines in South Australia at 30 April 2004. Of these, 1909 hectares (3%) were planted in 2003 (table 1.7). New planting of red varieties declined further (809 hectares planted, compared with 1330 hectares in 2002), while new planting of white varieties also declined (1097 compared with 1400 hectares in the previous year). Once again, 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 production for 2009 has been calculated for the major South Australian regions (table 1.9). This has been compared with the preferred intake figures given in the survey. The comparison suggests an overall shortfall of 44,000 tonnes between preferred intake and production (if the yield estimates are correct). The shortfall is almost entirely in the Riverland, with small shortages in Langhorne Creek, McLaren Vale and Padthaway (white varieties only). Conversely, there are significant surpluses of fruit forecast in the other regions - particularly the Barossa and Clare Valleys (red varieties). However, these figures should be treated with caution, as they are subject to significant fluctuation depending on the forecast figures (which vary from year to year) and on the estimates of future yield.
HISTORICAL TRENDS IN PRODUCTION 1996 TO 2004 BY REGION *

Figure 1.1

Vintage by region 1996 - 2004 major regions

Not including the Riverland

* Note: The Riverland is not included on this chart because it does not fit on the same scale. See page 97 for Riverland chart.
## VINTAGE 2004 BY VARIETY - RED

### Table 1.2

<table>
<thead>
<tr>
<th>Variety</th>
<th>Tonnes crushed</th>
<th>Tonnes preferred</th>
<th>Diff*</th>
<th>% of demand supplied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barbera</td>
<td>102</td>
<td>119</td>
<td>-17</td>
<td>85%</td>
</tr>
<tr>
<td>Cabernet Franc</td>
<td>2,952</td>
<td>1,519</td>
<td>1,433</td>
<td>194%</td>
</tr>
<tr>
<td>Cabernet Sauvignon</td>
<td>202,851</td>
<td>152,042</td>
<td>50,808</td>
<td>133%</td>
</tr>
<tr>
<td>Chambourcin</td>
<td>108</td>
<td>30</td>
<td>78</td>
<td>361%</td>
</tr>
<tr>
<td>Durif</td>
<td>43</td>
<td>32</td>
<td>11</td>
<td>136%</td>
</tr>
<tr>
<td>Grenache</td>
<td>20,613</td>
<td>17,861</td>
<td>2,752</td>
<td>115%</td>
</tr>
<tr>
<td>Malbec</td>
<td>2,514</td>
<td>2,191</td>
<td>323</td>
<td>115%</td>
</tr>
<tr>
<td>Mataro</td>
<td>9,978</td>
<td>5,541</td>
<td>4,437</td>
<td>180%</td>
</tr>
<tr>
<td>Merlot</td>
<td>55,201</td>
<td>48,383</td>
<td>6,818</td>
<td>114%</td>
</tr>
<tr>
<td>Muscat Brown</td>
<td>25</td>
<td>30</td>
<td>-5</td>
<td>85%</td>
</tr>
<tr>
<td>Nebbiolo</td>
<td>204</td>
<td>161</td>
<td>43</td>
<td>127%</td>
</tr>
<tr>
<td>Petit Verdot</td>
<td>16,190</td>
<td>12,570</td>
<td>3,620</td>
<td>129%</td>
</tr>
<tr>
<td>Pinot Noir</td>
<td>21,177</td>
<td>19,483</td>
<td>1,695</td>
<td>109%</td>
</tr>
<tr>
<td>Rubired</td>
<td>161</td>
<td>238</td>
<td>-77</td>
<td>68%</td>
</tr>
<tr>
<td>Ruby Cabernet</td>
<td>15,116</td>
<td>6,885</td>
<td>8,230</td>
<td>220%</td>
</tr>
<tr>
<td>Sangiovese</td>
<td>2,225</td>
<td>1,575</td>
<td>650</td>
<td>141%</td>
</tr>
<tr>
<td>Shiraz</td>
<td>268,602</td>
<td>232,622</td>
<td>35,979</td>
<td>115%</td>
</tr>
<tr>
<td>Tarrango</td>
<td>1,573</td>
<td>1,487</td>
<td>86</td>
<td>106%</td>
</tr>
<tr>
<td>Tempranillo</td>
<td>554</td>
<td>521</td>
<td>33</td>
<td>106%</td>
</tr>
<tr>
<td>Zinfandel</td>
<td>179</td>
<td>186</td>
<td>-7</td>
<td>96%</td>
</tr>
<tr>
<td>Other red</td>
<td>2,117</td>
<td>1,761</td>
<td>356</td>
<td>117%</td>
</tr>
<tr>
<td><strong>Total red</strong></td>
<td><strong>622,486</strong></td>
<td><strong>505,239</strong></td>
<td><strong>117,247</strong></td>
<td><strong>123%</strong></td>
</tr>
</tbody>
</table>

* A negative difference indicates a shortfall; a positive difference indicates a surplus
**VINTAGE 2004 BY VARIETY - WHITE**

**Table 1.3**

<table>
<thead>
<tr>
<th>Variety</th>
<th>Tonnes crushed</th>
<th>Tonnes preferred</th>
<th>Diff*</th>
<th>% of demand supplied</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WHITE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chardonnay</td>
<td>136,293</td>
<td>137,014</td>
<td>-720</td>
<td>99%</td>
</tr>
<tr>
<td>Chenin Blanc</td>
<td>6,746</td>
<td>6,107</td>
<td>639</td>
<td>110%</td>
</tr>
<tr>
<td>Colombard</td>
<td>29,396</td>
<td>30,041</td>
<td>-645</td>
<td>98%</td>
</tr>
<tr>
<td>Marsanne</td>
<td>211</td>
<td>202</td>
<td>9</td>
<td>104%</td>
</tr>
<tr>
<td>Merbein Seedless</td>
<td>110</td>
<td>110</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Muscadelle</td>
<td>521</td>
<td>479</td>
<td>42</td>
<td>109%</td>
</tr>
<tr>
<td>Muscat Blanc</td>
<td>1,085</td>
<td>1,180</td>
<td>-95</td>
<td>92%</td>
</tr>
<tr>
<td>Muscat Gordo Blanco</td>
<td>28,508</td>
<td>29,040</td>
<td>-532</td>
<td>98%</td>
</tr>
<tr>
<td>Pinot Gris</td>
<td>900</td>
<td>942</td>
<td>-42</td>
<td>96%</td>
</tr>
<tr>
<td>Riesling</td>
<td>24,465</td>
<td>24,028</td>
<td>437</td>
<td>102%</td>
</tr>
<tr>
<td>Roussanne</td>
<td>51</td>
<td>106</td>
<td>-55</td>
<td>48%</td>
</tr>
<tr>
<td>Sauvignon Blanc</td>
<td>18,155</td>
<td>17,738</td>
<td>417</td>
<td>102%</td>
</tr>
<tr>
<td>Semillon</td>
<td>29,072</td>
<td>28,781</td>
<td>291</td>
<td>101%</td>
</tr>
<tr>
<td>Sultana</td>
<td>5,839</td>
<td>6,461</td>
<td>-621</td>
<td>90%</td>
</tr>
<tr>
<td>Taminga</td>
<td>159</td>
<td>95</td>
<td>64</td>
<td>167%</td>
</tr>
<tr>
<td>Traminer</td>
<td>2,727</td>
<td>2,687</td>
<td>40</td>
<td>101%</td>
</tr>
<tr>
<td>Trebbiano</td>
<td>262</td>
<td>116</td>
<td>146</td>
<td>225%</td>
</tr>
<tr>
<td>Verdelho</td>
<td>4,148</td>
<td>4,092</td>
<td>56</td>
<td>101%</td>
</tr>
<tr>
<td>Viognier</td>
<td>2,376</td>
<td>2,557</td>
<td>-181</td>
<td>93%</td>
</tr>
<tr>
<td>Other white (1)</td>
<td>6,683</td>
<td>5,220</td>
<td>1,464</td>
<td>128%</td>
</tr>
<tr>
<td><strong>Total white</strong></td>
<td>297,708</td>
<td>296,997</td>
<td>712</td>
<td>100%</td>
</tr>
<tr>
<td><strong>Total all varieties</strong></td>
<td><strong>920,195</strong></td>
<td><strong>802,236</strong></td>
<td><strong>117,959</strong></td>
<td><strong>115%</strong></td>
</tr>
</tbody>
</table>

*1) Includes neutral whites Crouchen, Pedro Ximenes, Palamino and Doradillo

* A negative difference indicates a shortfall; a positive difference indicates a surplus
### Table 1.4

<table>
<thead>
<tr>
<th>Region</th>
<th>Winery grown (tonnes)</th>
<th>Independent grower (tonnes)</th>
<th>Total tonnes crushed</th>
<th>% winery grown</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADELAIDE HILLS</td>
<td>3959</td>
<td>34685</td>
<td>38645</td>
<td>10%</td>
</tr>
<tr>
<td>ADELAIDE PLAINS</td>
<td>413</td>
<td>6589</td>
<td>7003</td>
<td>6%</td>
</tr>
<tr>
<td>BAROSSA VALLEY</td>
<td>13151</td>
<td>57057</td>
<td>70208</td>
<td>19%</td>
</tr>
<tr>
<td>BAROSSA ZONE - OTHER</td>
<td>330</td>
<td>35</td>
<td>365</td>
<td>90%</td>
</tr>
<tr>
<td>BORDERTOWN</td>
<td>4922</td>
<td>12537</td>
<td>17459</td>
<td>28%</td>
</tr>
<tr>
<td>CLARE VALLEY</td>
<td>13518</td>
<td>19505</td>
<td>33023</td>
<td>41%</td>
</tr>
<tr>
<td>COONAWARRA</td>
<td>32730</td>
<td>29920</td>
<td>62651</td>
<td>52%</td>
</tr>
<tr>
<td>CURRENCY CREEK</td>
<td>3057</td>
<td>3267</td>
<td>6324</td>
<td>48%</td>
</tr>
<tr>
<td>EDEN VALLEY</td>
<td>7870</td>
<td>8449</td>
<td>16319</td>
<td>48%</td>
</tr>
<tr>
<td>FLEURIEU ZONE - OTHER</td>
<td>170</td>
<td>2881</td>
<td>3050</td>
<td>6%</td>
</tr>
<tr>
<td>KANGAROO ISLAND</td>
<td>44</td>
<td>77</td>
<td>121</td>
<td>36%</td>
</tr>
<tr>
<td>LANGLEHORNE CREEK</td>
<td>18292</td>
<td>36068</td>
<td>54360</td>
<td>34%</td>
</tr>
<tr>
<td>LIMESTONE COAST ZONE - OTHER</td>
<td>3841</td>
<td>5849</td>
<td>9690</td>
<td>40%</td>
</tr>
<tr>
<td>LOWER MURRAY ZONE - OTHER</td>
<td>272</td>
<td>2262</td>
<td>2534</td>
<td>11%</td>
</tr>
<tr>
<td>MCLAREN VALE</td>
<td>19612</td>
<td>51903</td>
<td>71515</td>
<td>27%</td>
</tr>
<tr>
<td>MOUNT BENSON</td>
<td>967</td>
<td>2067</td>
<td>3035</td>
<td>32%</td>
</tr>
<tr>
<td>MOUNT LOFTY RANGES ZONE - OTHER</td>
<td>159</td>
<td>1576</td>
<td>1735</td>
<td>9%</td>
</tr>
<tr>
<td>PADTHAYAW</td>
<td>31788</td>
<td>19342</td>
<td>51130</td>
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### Table 1.5 cont.d

VINTAGE STATISTICS 2004 - SUMMARY BY REGION (CONT.D)

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<th>total purchased</th>
<th>total crushed</th>
<th>estimated value of purchased grapes</th>
<th>estimated value of total crush</th>
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# FORECAST INTAKE (ESTIMATED AND PREFERRED) 2005 - 2009 BY VARIETY (RED)

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# FORECAST INTAKE (ESTIMATED AND PREFERRED) 2005 - 2009 BY VARIETY (WHITE)

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## CURRENT PLANTINGS* IN SA BY VARIETY (RED)

*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.*

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## CURRENT PLANTINGS IN SA BY VARIETY (WHITE)

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## CURRENT PLANTINGS IN SA BY GI REGION AND YEAR PLANTED

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### Number of Growers and Current Plantings in SA by Size of Property

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<td>57%</td>
<td>13%</td>
<td>26%</td>
<td>19%</td>
<td>10%</td>
<td>17%</td>
<td>7%</td>
<td>51%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
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</tr>
</tbody>
</table>

WINEGRAPE UTILISATION AND PRICING SURVEY 2004
NEW PLANTINGS IN SOUTH AUSTRALIA SINCE 1995

Figure 1.5

Year planted

Hectares

Red plantings

White plantings
ESTIMATED PRODUCTION COMPARED WITH FORECAST DEMAND IN 2009

<table>
<thead>
<tr>
<th>Region</th>
<th>Colour</th>
<th>Current vineyard area (ha)</th>
<th>Yield (1)</th>
<th>Estimated production 2009 (t)</th>
<th>Forecast demand 2009 (t)</th>
<th>Diff* (2)</th>
<th>Area required (ha)</th>
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<td>11</td>
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<td>RED</td>
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<td>56603</td>
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<td>11</td>
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<td>18854</td>
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<td>RIVERLAND</td>
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<td>18582</td>
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<td>12</td>
<td>2532</td>
<td>1671</td>
<td>861</td>
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<td><strong>Total (for these regions)</strong></td>
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<td>541080</td>
<td></td>
<td>530125</td>
<td>10955</td>
<td>3029</td>
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<td>-54838</td>
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</table>

(1) Based on current industry estimates. (2) A negative number indicates a shortfall; a positive number indicates a surplus

This table compares estimated future production (based on plantings already in the ground) with future demand, taken from the 2009 forecast intake figures. It shows that the Riverland is the only region where there is a significant shortfall in both red and white grapes in 2009. While initial analysis may indicate a need for increased plantings in the Riverland, some or much of this demand may be met by grapes purchased from other regions in surplus supply. However, there is not enough surplus of white varieties to meet the estimated shortfall without additional plantings (by 2005 or 2006).
Adelaide Hills

ADELAIDE HILLS VINTAGE OVERVIEW

Vintage report

Adelaide Hills Wine Region experienced a good growing season with generally higher yields and a late and long vintage. High bud fruitfulness from spring 2002 resulted in higher than average yield potential. This was realised by near perfect weather conditions during flowering in all varieties. Sauvignon Blanc and Merlot in particular set beautiful crops. This was a welcome change from the two previous lower-cropping vintages in most varieties.

The growing season was characterised by ample winter rain and a very cool start in October. Summer was generally mild, warm and dry with an uncharacteristically cool January. The February heat wave had limited impact on well-watered and balanced canopies and the region was generally far less affected than other grape growing regions.

Crop estimates had to be revised upward late in the season as bunch weights steadily increased after veraison. Bunch thinning was common to bring the canopy and crop more into balance.

With larger crops hanging on the vine, the long dry autumn was a blessing and resulted in very low disease pressure.

Tom Ayers, Adelaide Hills Wine Region

Overview of vintage statistics

The Adelaide Hills produced 38,645 tonnes in 2004 – more than double the 2003 vintage. There was a moderate surplus reported of reds (18%) and less in whites (9%).

The average purchase value per tonne for Cabernet Sauvignon, Merlot and Pinot Noir fell significantly (up to $500 per tonne), and Chardonnay fell by $250 per tonne. However, the total income to the region increased substantially, with the income to growers almost double, and the total value of grapes from the region up from $27.5 million to $56 million.

The forecast intake for the region declines from around 30,000 tonnes (20% less than the 2004 production) in 2006 to 25,000 in 2009. Sauvignon Blanc is expected to overtake Pinot Noir as the second most important variety for the region, and is the only major variety not showing a decline in intake between 2005 and 2009.

There were 126 hectares of white varieties (Chardonnay, Pinot Gris and Sauvignon Blanc) planted in 2003, and only 7 hectares of red varieties. This is in line with the change in demand back towards white varieties.

Based on the current vineyard area in the region, and using estimated yield figures of nine tonnes per hectare (t/ha) for reds and 10 t/ha for whites, the estimated production for the region in 2009 is around 32,000 tonnes. This is nearly 6,000 tonnes higher than the preferred intake from the region for that year. Most of the estimated surplus is in red varieties. While demand forecasts change from year to year, this discrepancy between potential production and intake may foreshadow some problems for growers without contracts.
## Adelaide Hills Current Plantings by Variety and Year Planted

**Table 2.1**

Current area in hectares by year planted

<table>
<thead>
<tr>
<th>Variety</th>
<th>Pre-1999</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>Total area</th>
<th>% planted in 2003</th>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
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<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0%</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
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<td>0</td>
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### ADELAIDE HILLS TONNES CRUSHED BY VARIETY - VINTAGE 2004

#### Table 2.2

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<th>Total crushed</th>
<th>Total preferred</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
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<th>Other</th>
<th>Preferred</th>
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<tr>
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</table>
| **Total WHITE**       | 2917               | 16897               | 19815         | 18210          | 85%                  |                                               | 109%
| **Total for region**  | 3959               | 34685               | 38645         | 34227           | 94%                  |                                               | 118%

---

**Rows 1-24:**

- Each row represents a different grape variety.
- For each variety, the table lists the total tonnages from wineries grown, other growers, total crushed, and total preferred.
- The % of demand supplied indicates the proportion of the market covered by the Crushed tonnages.
- The Number of wineries reporting tonnages (> 0) are categorized as Own, Other, and Preferred.
### Table 2.3

**Variety** | **Grower grown** | **Total crushed (1)** | **purchased grapes** | **total grapes** | **lowest price (2)** | **highest price (2)** | **calc average purchase value per tonne (3)**
--- | --- | --- | --- | --- | --- | --- | ---
**RED**
Barbera | 1 | 1 | $1,272 | $1,272 | | | $1,200 100%
Cabernet Franc | 94 | 119 | $94,915 | $119,275 | $300 | $1,800 | $1,006 100%
Cabernet Sauvignon | 3137 | 3369 | $4,032,196 | $4,329,418 | $200 | $3,900 | $1,285 100%
Gamay | 9 | 9 | $5,604 | $5,604 | | | $600 100%
Grenache | 74 | 74 | $119,080 | $119,080 | | | $1,612 100%
Malbec | 12 | 21 | $12,310 | $21,337 | | | $1,001 100%
Mataro (Mouvedre) | 25 | 25 | $28,120 | $28,120 | | | $1,118 100%
Merlot | 3757 | 3884 | $4,103,162 | $4,241,256 | $200 | $2,070 | $1,092 100%
Meunier | 562 | 568 | $879,821 | $888,398 | $550 | $2,196 | $1,565 100%
Nebbiolo | 12 | 12 | $9,660 | $9,660 | | | $808 100%
Petit Verdot | 35 | 35 | $41,034 | $41,034 | $1,100 | $1,500 | $1,165 100%
Pinot Noir | 7079 | 7461 | $9,532,451 | $10,047,065 | $200 | $2,475 | $1,347 100%
Sangiovese | 125 | 125 | $146,500 | $146,500 | $300 | $1,700 | $1,174 100%
Shiraz | 2796 | 3015 | $4,676,878 | $5,043,249 | $250 | $3,900 | $1,673 99%
Tempranillo | 55 | 81 | $91,767 | $135,274 | $1,000 | $2,071 | $1,680 100%
**Total RED** | 17775 | 18798 | $23,774,770 | $25,176,543 | | | |  
**WHITE**
Chardonnay | 8201 | 9403 | $13,696,594 | $15,704,167 | $500 | $3,325 | $1,670 99%
Marsanne | 3 | 3 | $5,652 | $5,652 | | | $1,823 100%
Other white (group) | 51 | 51 | $60,754 | $60,754 | | | $1,197 100%
Pinot Gris | 678 | 695 | $1,153,267 | $1,181,978 | $1,000 | $2,070 | $1,702 100%
Riesling | 430 | 622 | $521,975 | $754,554 | $500 | $1,900 | $1,213 100%
Sauvignon Blanc | 5317 | 6719 | $8,525,413 | $10,773,205 | $600 | $2,200 | $1,603 100%
Semillon | 1425 | 1477 | $1,497,782 | $1,552,441 | $300 | $1,800 | $1,051 100%
Traminer | 14 | 41 | $12,776 | $37,034 | | | $898 100%
Verdelho | 319 | 319 | $464,880 | $464,880 | $500 | $1,615 | $1,456 100%
Viognier | 459 | 485 | $632,484 | $668,081 | $200 | $2,071 | $1,378 100%
**Total WHITE** | 16897 | 19815 | $26,571,577 | $31,202,746 | | | |  

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
(3) This does not include end use bonuses or other adjustments determined post-receival.
### ADELAIDE HILLS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

**Table 2.4**

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Figure 2.1

Past production and projections (major varieties)

- **Pinot Noir**
- **Cabernet**
- **Sauvignon**
- **Shiraz**
- **Merlot**
- **Chardonnay**
- **Sauvignon Blanc**
- **Pinot Noir**
- **Merlot**
- **Shiraz**
- **Cabernet Sauvignon**

Timeline: 1992 - 2009
ADELAIDE PLAINS VINTAGE OVERVIEW

Vintage report

The weather was good to the Adelaide Plains region in 2003-4. After a dry winter, we were pleased to see good rains in the later part of August and early September. Cold conditions played a part in September through to October but no frost damage was reported and only slight wind damage in the Shiraz – mainly the top tips of the shoots.

The weather stayed kind to us and there was good flowering and fruit set. A dry November meant that by the end of the month, the soil was starting to really dry out.

December remained dry – with several days rocketing to the low 40°Cs – causing some early headaches for growers monitoring ripening and watering.

The Adelaide Plains region has one of the lowest incidences of pests and diseases in Australia and this season also did not present any problems, particularly with downy or powdery mildew. The dry continued into January, but much cooler. More good weather and the grapes ripened well.

Vintage 2004 arrived with an earlier than usual harvest for Chardonnay – some as early as the first days of February.

Winemakers decided on the whites coming off early with lower baumes in order to keep freshness and flavour before forecast hot weather could have a ruinous effect.

Some nights in February were very warm (damned hot) causing some problems with fruit temperature and during harvest itself. Tonnages were generally up.

Overall, quality for both whites and reds was good, with fruit coming off at a lower baume than normal due to the warm and unpredictable conditions. This helped retain flavours and kept the fruit in better than predicted condition. We are pretty happy with what we are working with – particularly the reds, with rich deep colours and full fruit flavours.

Dr Joe Ceravolo
President, Adelaide Plains Wine Region Inc

Overview of vintage statistics

The reported crush for the Adelaide Plains in 2004 was 7,003 tonnes. Although this was 27% more than in 2003, there was no surplus of white varieties, and only a small surplus of reds. However, there were substantial reductions in the average purchase value of the fruit – with Shiraz and Cabernet Sauvignon down by over $300 per tonne. The Chardonnay price only dropped by $30 per tonne. Despite this, income to growers overall remained about the same, because of the higher tonnages.

The forecast is for intake of red varieties to decline to less than 3,000 tonnes, while whites remain at around 2,500 tonnes.

There were 40 hectares of white varieties planted in the region in 2003 – a 20% increase. Production estimates for 2009 suggest a small surplus in red varieties compared with intake requirements.
## ADELAIDE PLAINS CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

### Table 3.1

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<th>2002</th>
<th>2003</th>
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<td>572</td>
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*Note: some increase in area in this region is a result of including previously unregistered growers with older plantings.*
# ADELAIDE PLAINS TONNES CRUSHED BY VARIETY - VINTAGE 2004

<table>
<thead>
<tr>
<th>Variety</th>
<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>Tonnes from other growers as % of total</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for Own</th>
<th>Other</th>
<th>Preferred</th>
</tr>
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<tbody>
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<td><strong>RED</strong></td>
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<td></td>
</tr>
<tr>
<td>Cabernet Sauvignon</td>
<td>59</td>
<td>640</td>
<td>699</td>
<td>662</td>
<td>92%</td>
<td>105%</td>
<td>3</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Grenache</td>
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<td>521</td>
<td>551</td>
<td>99%</td>
<td>95%</td>
<td>1</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
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<td>62</td>
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<td>111%</td>
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<td>6</td>
<td>7</td>
</tr>
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<td>18</td>
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<td>100%</td>
<td>122%</td>
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<td>100%</td>
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<td>1</td>
</tr>
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<td>100%</td>
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<td>0</td>
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</tr>
<tr>
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<td>59</td>
<td>15</td>
<td>100%</td>
<td>391%</td>
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<tr>
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<td>141</td>
<td>2318</td>
<td>2459</td>
<td>2124</td>
<td>94%</td>
<td>116%</td>
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<td>10</td>
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<td>100%</td>
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<tr>
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<td>4181</td>
<td>94%</td>
<td>112%</td>
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<tr>
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<td>98%</td>
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<td>100%</td>
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<td>97%</td>
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<td>100%</td>
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<tr>
<td><strong>Total WHITE</strong></td>
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<td>99%</td>
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## ADELAIDE PLAINS CROP VALUE DATA - VINTAGE 2004

### Table 3.3

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<th>Variety</th>
<th>Grower grown</th>
<th>Total crushed (1)</th>
<th>purchased grapes</th>
<th>total grapes</th>
<th>lowest price (2)</th>
<th>highest price (2)</th>
<th>calc average purchase</th>
<th>value per tonne (3)</th>
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</tbody>
</table>

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receipt.
### Table 3.4

**ADELAIDE PLAINS ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009**

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<td>preferred</td>
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</tr>
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Figure 3.1

Past production and projections (major varieties)

- **Past Production**
  - Shiraz
  - Chardonnay
  - Sauvignon Blanc
  - Cabernet Sauvignon

- **Projections**
  - Shiraz

**Data**
- Years: 1994 to 2009
- Tonnes: 0 to 3000
BAROSSA VALLEY VINTAGE OVERVIEW

Vintage report

A heavy fruitset initially had predictions for high yields in the Barossa, but bunch thinning around veraison brought crop levels back to manageable levels with promising quality. A mild January was excellent for optimal colour production and flavour development. Heatwave conditions in mid-February saw acidity decline at a rapid rate in conjunction with rising baume levels. Harvest began earlier than first predicted, with the earliest Shiraz being picked in late February. Quality expectations returned to high after the February scare – the Barossa experienced an Indian summer with no huge rainfall events and temperatures ranging between 25 and 30 degrees. Semillon is some of the best ever and Shiraz has good colour with elegant flavours.

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Overview of vintage statistics

There were 70,574 tonnes crushed from Barossa Valley vineyards in 2004 – nearly 50% more than in 2003, and 13,000 tonnes more than the previous record vintage of 2002. Despite the record tonnage, whites were still in short supply – particularly Chardonnay – while there was a surplus of reds.

The calculated average purchase value of the major red varieties was generally lower, with Cabernet Sauvignon (down $350 per tonne) and Merlot (down $450 per tonne) the hardest hit. Average values of white varieties were generally similar to 2003. Overall, income to growers increased substantially (up by more than 25%) because of the extra tonnages, while the total value of grapes from the region was up from $67.5 million last year to $87 million this year.

The forecast is for intake of red varieties to increase from 50,000 tonnes in 2005 to 56,000 tonnes in 2008 with a surplus in each forecast year between estimated and preferred intake. White varieties are expected to remain at around 20,000 tonnes, with a shortfall between estimated and preferred intake. The region is expected to remain dominated by Shiraz, which accounts for nearly 50% of the total intake; however, there is a surplus of over 3,000 tonnes forecast between estimated and preferred intake of Shiraz in most years.

There were 250 hectares (3%) of new plantings in 2003 – more than half in Shiraz. Based on the current vineyard area, and using yield estimates of 10 t/ha for reds and 11 t/ha for whites, the estimated production from the Barossa in 2009 is approximately 93,000 tonnes. This means an approximate surplus of 20,000 tonnes of red varieties (40%) and 3,000 tonnes of whites compared with the 2009 preferred intake figures. While demand forecasts do change from year to year, this discrepancy may foreshadow some difficulties for growers without contracts in the future.
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<th>Variety</th>
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<th>2002</th>
<th>2003</th>
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<th>% planted in 2003</th>
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Also includes plantings in “Barossa Zone - other” (99ha)
## BAROSSA VALLEY TONNES CRUSHED BY VARIETY (RED) - VINTAGE 2004

**Table 4.2**

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<th>Total crushed</th>
<th>Total preferred</th>
<th>Tonnes from other growers as % of total supplied</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
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<td>104%</td>
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<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Zinfandel</td>
<td>16</td>
<td>89</td>
<td>105</td>
<td>107</td>
<td>84%</td>
<td>99%</td>
<td></td>
<td>4</td>
<td>4</td>
<td>8</td>
</tr>
</tbody>
</table>

| Total RED        | 10033              | 39905               | 49939         | 41416          | 80%                                              | 121%                |                                               |     |       |           |
## BAROSSA VALLEY TONNES CRUSHED BY VARIETY (WHITE) - VINTAGE 2004

### Table 4.3

<table>
<thead>
<tr>
<th>Variety</th>
<th>Own</th>
<th>Other</th>
<th>Preferred</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
<th>Total winery grown</th>
<th>Total other growers</th>
<th>% of demand supplied</th>
<th>Total preferred</th>
</tr>
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<tbody>
<tr>
<td>Chardonnay</td>
<td>13</td>
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<td>21</td>
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<td>6997</td>
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<td>83%</td>
<td>1014</td>
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<td>Chenin Blanc</td>
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<td>7</td>
<td>7</td>
<td>454</td>
<td>454</td>
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<td>98%</td>
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<td>Colombard</td>
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<td>0</td>
<td>0</td>
<td>0%</td>
<td>0%</td>
<td>0</td>
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</tr>
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<td>Doradillo</td>
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<td>0</td>
<td>0%</td>
<td>0%</td>
<td>9</td>
<td>0</td>
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<td>Marsanne</td>
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<td>3</td>
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<td>16</td>
<td>90%</td>
<td>7%</td>
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<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Muscadelle (Tokay)</td>
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<td>8</td>
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<td>123</td>
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<td>98%</td>
<td>4</td>
<td>169</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Muscat Blanc (Frontignac)</td>
<td>4</td>
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<td>9</td>
<td>479</td>
<td>479</td>
<td>76%</td>
<td>80%</td>
<td>74</td>
<td>290</td>
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<tr>
<td>Other white</td>
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<td>5</td>
<td>25</td>
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<td>72%</td>
<td>10%</td>
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<td></td>
</tr>
<tr>
<td>Palomino</td>
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<td>2</td>
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<td>81</td>
<td>111%</td>
<td>3%</td>
<td>88</td>
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<td></td>
</tr>
<tr>
<td>Pedro Ximenes</td>
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<td>5</td>
<td>63</td>
<td>63</td>
<td>182%</td>
<td>54%</td>
<td>53</td>
<td>62</td>
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<td></td>
</tr>
<tr>
<td>Riesling</td>
<td>10</td>
<td>17</td>
<td>20</td>
<td>2856</td>
<td>2856</td>
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<td>71%</td>
<td>948</td>
<td>2322</td>
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<td>0%</td>
<td>2</td>
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<td></td>
</tr>
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<td>10</td>
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<td>1160</td>
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<td>65%</td>
<td>389</td>
<td>732</td>
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</tr>
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<td>Semillon</td>
<td>19</td>
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<td>30</td>
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<td>8859</td>
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<td>91%</td>
<td>775</td>
<td>7979</td>
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<td>100%</td>
<td>0</td>
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</tr>
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<td>3</td>
<td>79</td>
<td>79</td>
<td>91%</td>
<td>80%</td>
<td>14</td>
<td>58</td>
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<td></td>
</tr>
<tr>
<td>Trebbiano</td>
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<td>3</td>
<td>1</td>
<td>1</td>
<td>631%</td>
<td>100%</td>
<td>0</td>
<td>9</td>
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<td>Verdelho</td>
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<td>1</td>
<td>52</td>
<td>52</td>
<td>100%</td>
<td>100%</td>
<td>0</td>
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<td></td>
</tr>
<tr>
<td>Viognier</td>
<td>5</td>
<td>4</td>
<td>8</td>
<td>118</td>
<td>118</td>
<td>108%</td>
<td>71%</td>
<td>37</td>
<td>90</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total WHITE**

|                    | 3449 | 17187 | 20635 | 21380 | 83% | 97% |

**Total for region**

|                    | 13482 | 57092 | 70574 | 62797 |

*Also includes production from “Barossa Zone - other” (365 tonnes)*
BAROSSA VALLEY CROP VALUE DATA (RED) - VINTAGE 2004

Table 4.4

<table>
<thead>
<tr>
<th>Variety</th>
<th>Grower grown</th>
<th>Total crushed (1)</th>
<th>purchased grapes</th>
<th>total grapes</th>
<th>price (2)</th>
<th>price (2)</th>
<th>calc average purchase</th>
<th>value per tonne (3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cabernet Franc</td>
<td>233</td>
<td>310</td>
<td>$191,269</td>
<td>$254,607</td>
<td>$333</td>
<td>$1,100</td>
<td>$821</td>
<td>100%</td>
</tr>
<tr>
<td>Cabernet Sauvignon</td>
<td>6855</td>
<td>9038</td>
<td>$7,688,691</td>
<td>$10,137,156</td>
<td>$200</td>
<td>$5,730</td>
<td>$1,122</td>
<td>92%</td>
</tr>
<tr>
<td>Grenache</td>
<td>3849</td>
<td>4668</td>
<td>$4,691,471</td>
<td>$5,690,645</td>
<td>$383</td>
<td>$4,000</td>
<td>$1,219</td>
<td>100%</td>
</tr>
<tr>
<td>Malbec</td>
<td>70</td>
<td>131</td>
<td>$80,431</td>
<td>$150,396</td>
<td>$400</td>
<td>$1,750</td>
<td>$1,145</td>
<td>100%</td>
</tr>
<tr>
<td>Mataro (Mouvedre)</td>
<td>572</td>
<td>880</td>
<td>$813,253</td>
<td>$1,251,310</td>
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<td>$4,000</td>
<td>$1,421</td>
<td>100%</td>
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<td>Merlot</td>
<td>1716</td>
<td>2290</td>
<td>$1,729,236</td>
<td>$2,307,774</td>
<td>$175</td>
<td>$3,000</td>
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<td>96%</td>
</tr>
<tr>
<td>Nebbiolo</td>
<td>2</td>
<td>70</td>
<td>$3,105</td>
<td>$95,013</td>
<td></td>
<td></td>
<td>$1,350</td>
<td>100%</td>
</tr>
<tr>
<td>Other red</td>
<td>14</td>
<td>39</td>
<td>$14,852</td>
<td>$40,940</td>
<td></td>
<td></td>
<td>$1,045</td>
<td>100%</td>
</tr>
<tr>
<td>Petit Verdot</td>
<td>76</td>
<td>124</td>
<td>$59,626</td>
<td>$97,393</td>
<td>$300</td>
<td>$2,000</td>
<td>$787</td>
<td>100%</td>
</tr>
<tr>
<td>Pinot Noir</td>
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<td>699</td>
<td>$503,692</td>
<td>$546,609</td>
<td>$300</td>
<td>$1,688</td>
<td>$782</td>
<td>100%</td>
</tr>
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<td>Sangiovese</td>
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<td>$191,527</td>
<td>$224,628</td>
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<td>$1,800</td>
<td>$1,338</td>
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<td>Shiraz</td>
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<td>$1,463</td>
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<td>Tempranillo</td>
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<td>70</td>
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<td>$109,761</td>
<td>$1,400</td>
<td>$2,000</td>
<td>$1,565</td>
<td>100%</td>
</tr>
<tr>
<td>Tinta Molle</td>
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<td>10</td>
<td>$7,512</td>
<td>$7,512</td>
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<td>$768</td>
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<td>154</td>
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<td>$126,526</td>
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<td>$1,500</td>
<td>$823</td>
<td>100%</td>
</tr>
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<td>105</td>
<td>$127,276</td>
<td>$150,837</td>
<td>$550</td>
<td>$2,110</td>
<td>$1,433</td>
<td>100%</td>
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<tr>
<td><strong>Total RED</strong></td>
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<td><strong>49903</strong></td>
<td><strong>$53,488,801</strong></td>
<td><strong>$66,756,015</strong></td>
<td><strong>$660,000</strong></td>
<td><strong>$788,000</strong></td>
<td><strong>$1,433</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
(3) This does not include end use bonuses or other adjustments determined post-receival.
### BAROSSA VALLEY CROP VALUE DATA (WHITE) - VINTAGE 2004

**Table 4.5**

<table>
<thead>
<tr>
<th>Variety</th>
<th>Grower grown</th>
<th>Total crushed (1)</th>
<th>purchased grapes</th>
<th>total grapes</th>
<th>price (2)</th>
<th>price (2)</th>
<th>calc average purchase</th>
<th>value per tonne (3)</th>
<th>lowest</th>
<th>highest</th>
<th>estimated total value</th>
</tr>
</thead>
<tbody>
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<td><strong>WHITE</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chardonnay</td>
<td>4897</td>
<td>5911</td>
<td>$5,965,430</td>
<td>$7,200,734</td>
<td>$700</td>
<td>$1,688</td>
<td>$1,218</td>
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</tr>
<tr>
<td>Chenin Blanc</td>
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<td>505</td>
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<td>$600</td>
<td>$523</td>
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<td>12</td>
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<td>$7,576</td>
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<td>$650</td>
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<td>$1,250</td>
<td>100%</td>
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</tr>
<tr>
<td>Muscadelle (Tokay)</td>
<td>168</td>
<td>172</td>
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<td>$1,567</td>
<td>$528</td>
<td>100%</td>
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<tr>
<td>Muscat Blanc (Frontignac)</td>
<td>290</td>
<td>365</td>
<td>$184,934</td>
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<td>$1,500</td>
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<tr>
<td>Other white (group)</td>
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<td>18</td>
<td>$2,492</td>
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</tr>
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<td>116</td>
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<td>$750</td>
<td>$334</td>
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<td>$1,099</td>
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<td>16</td>
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<td>$4,782</td>
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<td></td>
<td>$300</td>
<td>100%</td>
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<td>9</td>
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<td>$3,348</td>
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<td>$500</td>
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<td>$54,726</td>
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<td>$1,050</td>
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<td>$2,250</td>
<td>$1,618</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.
### Table 4.6: Barossa Valley Estimated and Preferred Future Intake of Grapes 2005 to 2009

<table>
<thead>
<tr>
<th>Variety</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>estimated</td>
<td>preferred</td>
<td>estimated</td>
<td>preferred</td>
<td>estimated</td>
</tr>
<tr>
<td><strong>RED</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barbera</td>
<td>4</td>
<td>0</td>
<td>8</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Cabernet Franc</td>
<td>264</td>
<td>205</td>
<td>237</td>
<td>190</td>
<td>246</td>
</tr>
<tr>
<td>Cabernet Sauvignon</td>
<td>10154</td>
<td>8342</td>
<td>10413</td>
<td>8429</td>
<td>10382</td>
</tr>
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<td>Grenache</td>
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<td>4240</td>
<td>4474</td>
<td>4341</td>
<td>4669</td>
</tr>
<tr>
<td>Malbec</td>
<td>112</td>
<td>67</td>
<td>117</td>
<td>67</td>
<td>142</td>
</tr>
<tr>
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<td>879</td>
<td>1043</td>
<td>1016</td>
<td>1080</td>
</tr>
<tr>
<td>Merlot</td>
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<td>2562</td>
<td>3012</td>
<td>2857</td>
<td>3310</td>
</tr>
<tr>
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<td>32</td>
<td>82</td>
<td>32</td>
<td>82</td>
</tr>
<tr>
<td>Other red</td>
<td>69</td>
<td>34</td>
<td>116</td>
<td>81</td>
<td>118</td>
</tr>
<tr>
<td>Petit Verdot</td>
<td>132</td>
<td>68</td>
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<td>74</td>
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<td>7847</td>
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<td>70092</td>
<td>65888</td>
<td>73064</td>
<td>68751</td>
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BAROSSA VALLEY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1997 - 2009

Figure 4.1

Past production and projections (major varieties)
The 2004 vintage had its challenges but the strength of the Clare Valley as a premium wine region has shone through, with some excellent wines produced, including some of the best Cabernet Sauvignon seen for several years.

Seasonal influences for the 2004 vintage were more dramatic than usual. From early October through to the end of vintage, Clare experienced less than half the long-term rainfall for that period. November was warmer than average, December the hottest for some time and then January was one of the coolest on record.

At the beginning of February the Clare Valley was looking picturesque with vineyards in excellent condition and healthy canopies appearing in balance with crop levels. Then a heatwave descended upon the Valley. For sixteen days the average maximum temperature was 37.9°C. It was difficult to remain positive as the heat took its toll on the vines.

Vintage commenced early, with a large percentage of Chardonnay and Semillon picked by the end of February. Following this, ripening slowed and generally within the district it was a long drawn-out vintage for wineries.

The 2004 Rieslings showed amazing resilience in the face of extreme weather conditions. Naturally, some loss of Riesling fruit occurred due to sunburn; however with greater attention to detail and by hand selection, this was easily separated. Above average Riesling yields were achieved and wines are displaying generous, full flavours with good concentration.

Cabernet Sauvignon was one of the highlights of the vintage with many winemakers reporting excellent parcels of fruit. The wines are exhibiting generosity of flavour with ripe tannin structure, good varietal character and excellent colour. Bunch stem necrosis, probably due to heat and lack of moisture, diminished crop levels in some vineyards.

Kerri Thompson
Chairman, Clare Valley Winemakers Inc.

Overview of vintage statistics

The Clare Valley produced 33,023 tonnes in 2004 – 72% up on the drought-affected 2003 vintage, and 6,000 tonnes more than the previous record harvest in 2002. There were significant surpluses in red varieties, especially Shiraz, but supply and demand for whites were in balance. Prices held up reasonably well compared with many regions; the average purchase value for most of the major varieties dropping by around $100 per tonne, while the average value for Riesling and Semillon actually increased. Total income to growers nearly doubled, because of the high tonnages, and the total value of grapes to the region increased from $29 million in 2003 to $45 million.

The forecast is for a slight decline in intake of red varieties, from 25,000 in 2005 to 22,000 in 2009. Preferred intake is below the estimated figure in each year. Intake of white varieties is expected to stabilise at around 12,000 tonnes, with supply and demand in balance. Riesling is expected to overtake Cabernet Sauvignon as the second most important variety for the region in 2008, and is the only variety where the forecast is for more intake in 2009 than was produced in 2004.

Consistent with the intake forecasts, there were 96 hectares of Riesling (11% increase) planted in 2003, following a similar increase the previous year. The area of Riesling has increased by nearly one third in the past two planting seasons.
## CLARE VALLEY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

### Table 5.1

<table>
<thead>
<tr>
<th>Variety</th>
<th>Pre-1999</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>Total area</th>
<th>% planted in 2003</th>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
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<td>0</td>
<td>2</td>
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<td>1</td>
<td>0</td>
<td>0</td>
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</tr>
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<td>0</td>
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<td>3</td>
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<td>4</td>
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Note: some increase in area in this region is a result of including previously unregistered growers with older plantings.
## CLARE VALLEY TONNES CRUSHED BY VARIETY - VINTAGE 2004

**Table 5.2**

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<th>Variety</th>
<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
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<th>Other</th>
<th>Preferred</th>
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<td>138%</td>
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<td>6</td>
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<td>18</td>
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<td>119%</td>
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<td>3</td>
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<td>0%</td>
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<td>140%</td>
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</tr>
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<td>122%</td>
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<td>100%</td>
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<td>69</td>
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<td>114%</td>
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<td>0</td>
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### RED

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<th>total grapes</th>
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### WHITE

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(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.
### Table 5.4

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Figure 5.1

Past production and projections (major varieties)
COONAWARRA VINTAGE OVERVIEW

Vintage Report

An ideal growing season leading into the 2004 vintage, combined with the maturation of new plantings, has resulted in a record vintage for the Coonawarra wine region.

The winter and spring conditions of 2003 were considered average in terms of temperature and rainfall, although budburst occurred slightly later than normal. Warmer weather in late spring and early summer produced ideal flowering conditions. The excellent flowering period achieved almost 100% fruit set, and all indications pointed to above average crop levels in all varieties.

Very cool and dry conditions during January accounted for the delay in veraison. The slow ripening conditions meant the start of vintage was approximately two weeks later than normal, in mid March.

Two rain episodes in March caused minor disruption to harvest, but also boosted soil moisture after a particularly dry summer and early autumn. Wind and sun immediately following both rainfalls ensured rapid drying of the vines and minimised any disease pressure. There were a number of isolated outbreaks of botrytis in some thinner-skinned varieties reported; however the vast majority of fruit was clean and disease free.

Post vintage assessments have been encouraging, with early reports identifying rich, ripe fruit flavours and good structure in the red wines, and attractive fruit and acid balance in the white wines. The region’s winemakers are particularly pleased with the quality of Cabernet Sauvignon and Merlot wines, and there is widespread satisfaction with white wines, in particular Riesling and Chardonnay.

Bruce Redman
President, Coonawarra Vignerons Association

Overview of vintage statistics

Coonawarra produced 62,651 tonnes in 2004 – nearly three times the 2003 harvest, and almost 10,000 tonnes more than the previous record harvest of 53,125 tonnes in 2001. This was in spite of widespread crop thinning. There was a 33% surplus of red varieties, and a 20% surplus of whites.

The record tonnages produced big falls in the average purchase value of most varieties: Cabernet Sauvignon (down $700), Merlot (down $850) and Shiraz (down $1000 per tonne) were the hardest hit. The average purchase value of the white varieties held up reasonably well. On the other hand, the total income to the region’s growers almost doubled because of the increased tonnages, and the total estimated value of grapes from the region increased from $41 million in 2003 to $69 million.

The forecast is for intake of red varieties to be around 37,000 tonnes (compared with 55,000 tonnes this vintage) and whites to be around 5,500 tonnes (compared with 8,000 tonnes this vintage). Cabernet Sauvignon remains by far the most important variety for the region, accounting for nearly 50% of the total forecast intake. Despite the lack of forecast growth in intake, there were nearly 80 hectares of Cabernet Sauvignon and Shiraz planted in the region in 2003. Based on the current vineyard area, and using yield estimates of 9 t/ha for reds and 10 t/ha for whites, the estimated production from Coonawarra in 2009 is 50,000 tonnes. This means an approximate surplus of 7,000 tonnes of red varieties and 1,600 tonnes of whites compared with the 2009 preferred intake figures. While demand forecasts do change from year to year, this discrepancy may foreshadow some difficulties for growers without contracts in the future.
## Table 6.1

**Current area in hectares by year planted**

<table>
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<th>Variety</th>
<th>Pre-1999</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>Total area</th>
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| **WHITE**    |     |       |           |
| Chardonnay   | 10  | 13    | 19        |
| Other white  | 1   | 0     | 0         |
| Pedro Ximenes | 1   | 0     | 1         |
| Riesling     | 6   | 4     | 9         |
| Sauvignon Blanc | 6   | 6     | 11        |
| Semillon     | 2   | 2     | 4         |
| Traminer     | 1   | 0     | 1         |
| Viognier     | 0   | 1     | 1         |
| **Total WHITE** | 6   | 4     | 9         |

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## COONAWARRA CROP VALUE DATA - VINTAGE 2004

### Table 6.3

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1. Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
2. The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
3. This does not include end use bonuses or other adjustments determined post-receival.
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COONAWARRA PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1996 - 2009

Figure 6.1

Past production and projections (major varieties)

PAST PRODUCTION

PROJECTIONS

Cabernet Sauvignon

Shiraz

Chardonnay

Merlot

Tonnes


WINEGRAPE UTILISATION AND PRICING SURVEY 2004

53
EDEN VALLEY VINTAGE OVERVIEW

Vintage report

The average winter rainfall this season was a welcome relief after last year’s fourth worst drought in history. The soil profile was filled, as were most dams. A relatively frost free, wet, warm and thundery spring followed, which created a natural green house effect for the vines. They grew vigorously, flowered and, in general, set a large crop. December was the hottest for 10 years; however in January the weather became mild and windy, tempered by the cool southerlies off the ocean. January was unusually cool with similarities to January 2002. The heatwave in February caused some sunburn and crop losses. Fortunately, March returned the region to glorious sunny days and cold, dewy nights, with a couple of minor rain events, allowing the fruit to ripen under near perfect conditions. The vintage was almost as late as in 2002, due to the extended, dry and warm autumn period. Riesling looks particularly fine because of the cool ripening period in March.

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With kind permission

Overview of vintage statistics

Eden Valley produced 16,319 tonnes in 2004 – nearly double the 2003 harvest of 9,446. There were significant surpluses in all major varieties – even Riesling and Chardonnay.

There were big falls in the calculated average purchase value of the major red varieties, particularly Cabernet Sauvignon (down nearly $600 per tonnes) and Shiraz (down $400 per tonne). On the other hand, the average purchase value of Chardonnay actually increased slightly compared with 2003. Overall, income to growers increased substantially (up by more than 30%) because of the large tonnages.

The forecast is for a total intake of around 15,000 tonnes by 2009 (lower than this year’s actual production) with estimated being higher than preferred intake in each year. This is a reverse of the forecasts given in 2003, which showed a shortfall in each year – made up particularly of Chardonnay and Riesling.

There was very little new planting in 2003 – 15 hectares of Riesling being the most significant. Based on the current vineyard area, and using yield estimates of 10 t/ha for reds and 11 t/ha for whites, the estimated production from Eden Valley in 2009 is approximately 23,000 tonnes. This means an approximate surplus of 6,000 tonnes of red varieties (more than 50%) and 2,000 tonnes of whites (25%) compared with the 2009 preferred intake figures. While demand forecasts do change from year to year, this discrepancy may foreshadow some difficulties for growers without contracts in the future.
## EDEN VALLEY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

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*Note: some increase in area in this region is a result of including previously unregistered growers with older plantings.*
## EDEN VALLEY TONNES CRUSHED BY VARIETY - VINTAGE 2004

### Table 7.2

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<th>Variety</th>
<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>Tonnes from other growers as % of total</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
<th>Own</th>
<th>Other</th>
<th>Preferred</th>
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<td>94%</td>
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</table>
## EDEN VALLEY CROP VALUE DATA - VINTAGE 2004

**Table 7.3**

| Variety          | Grower grown | Total crushed (1) | purchased grapes | total grapes | price (2) | price (2) | value per tonne (3) | calc average purchase | lowest | highest |
|------------------|--------------|-------------------|------------------|--------------|-----------|-----------|---------------------|------------------------|--------|---------|    |
| **RED**          |              |                   |                  |              |           |           |                     |                        |        |         |    |
| Cabernet Franc   | 21           | 40                | $29,176          | $55,788      |           |           |                     |                        |        |         | $1,403 100% |
| Cabernet Sauvignon | 1094       | 2174              | $1,162,174       | $2,308,446   | $200      | $4,578    |                     |                        |        |         | $1,062 100% |
| Grenache         | 68           | 159               | $62,344          | $146,512     | $700      | $1,500    |                     |                        |        |         | $922 100% |
| Mataro (Mouvedre) | 81          | 82                | $93,587          | $93,748      |           |           |                     |                        |        |         | $1,150 100% |
| Merlot           | 215          | 722               | $232,843         | $782,833     | $300      | $1,450    |                     |                        |        |         | $1,085 100% |
| Pinot Noir       | 363          | 649               | $390,921         | $699,379     | $250      | $1,980    |                     |                        |        |         | $1,078 100% |
| Sangiovese       | 13           | 13                | $12,846          | $12,846      |           |           |                     |                        |        |         | $1,002 100% |
| Shiraz           | 2906         | 4159              | $4,173,001       | $5,973,242   | $200      | $7,475    |                     |                        |        |         | $1,436 99% |
| **Total RED**    | 4760         | 7996              | $6,156,892       | $10,072,793  |           |           |                     |                        |        |         |    |
| **WHITE**        |              |                   |                  |              |           |           |                     |                        |        |         |    |
| Chardonnay       | 1156         | 2513              | $1,721,233       | $3,740,140   | $943      | $1,800    |                     |                        |        |         | $1,488 100% |
| Muscadelle (Tokay) | 20        | 20                | $7,168           | $7,168       |           |           |                     |                        |        |         | $350 100% |
| Muscat Blanc (Frontignac) | 21 | 40 | $14,539 | $27,902 | $500 | $800 |                     |                        |        |         | $704 100% |
| Pinot Gris       | 12           | 81                | $15,788          | $108,270     |           |           |                     |                        |        |         | $1,329 100% |
| Riesling         | 1674         | 4162              | $2,637,934       | $6,559,898   | $450      | $2,300    |                     |                        |        |         | $1,576 100% |
| Sauvignon Blanc  | 84           | 389               | $116,152         | $537,799     | $1,100    | $1,600    |                     |                        |        |         | $1,382 100% |
| Semillon         | 449          | 527               | $405,141         | $476,040     | $650      | $1,400    |                     |                        |        |         | $903 100% |
| Traminer         | 106          | 225               | $115,620         | $245,055     | $600      | $1,350    |                     |                        |        |         | $1,087 100% |
| Viognier         | 167          | 211               | $325,501         | $411,374     |           |           |                     |                        |        |         | $1,947 100% |
| **Total WHITE**  | 3689         | 8169              | $5,359,076       | $12,113,646  |           |           |                     |                        |        |         |    |

---

1. Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
2. The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
3. This does not include end use bonuses or other adjustments determined post-receival.
### EDEN VALLEY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

**Table 7.4**

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<th>2007</th>
<th>2008</th>
<th>2009</th>
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</tr>
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<td>30</td>
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<td>30</td>
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<td>83</td>
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<td>61</td>
<td>61</td>
<td>61</td>
<td>61</td>
</tr>
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<td>693</td>
<td>563</td>
<td>703</td>
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Figure 7.1

Past production and projections (major varieties)
The Fleurieu zone (other) includes the GI regions Southern Fleurieu, Currency Creek and Kangaroo Island, as well as any other plantings in the zone that are outside the major regions of McLaren Vale and Langhorne Creek. Because of the small size of the GI regions, they are not reported separately. However, tonnage and forecast data are available for these regions on request from the Board.

The growing season for Currency Creek commenced with good soil moisture levels due to above average September rainfall, and irrigation did not commence until early December. Bud burst was even across all varieties - Chardonnay being a little earlier than average. Bunch numbers were above average per shoot and early bunch counts indicated higher yields on some varieties.

Cool December and January temperatures slowed shoot growth somewhat with an even flowering occurring. There was little disease pressure during the initial growing season.

February brought a heat wave, which had an impact on Chardonnay, Riesling and Sauvignon Blanc. Temperatures rose to 45 degrees on Valentine’s Day! This really did affect those whites that had not been harvested at this point. From then on there were near perfect ripening conditions through March, April and May. The reds began to be harvested in early April and were completed mid May. There was little disease pressure at the finishing end of the season.

The yields were above average across most varieties; particularly Cabernet Sauvignon and Sauvignon Blanc. The quality of the whites that were not picked before the heat wave was no doubt affected by the heat; however the reds are looking sensational, with fantastic colour, strong varietal flavours and great depth.

In summary, it was a great vintage.

Philip Shaw
Ballast Stone Estate Wines

Overview of vintage statistics

The Fleurieu zone (other) is a rapidly growing area. It produced 10,426 tonnes in 2004 – nearly 50% more than in 2003, which in turn was 75% more than in 2002. This year there was a 24% surplus of red varieties, which was reflected in big decreases in the average purchase value of the major red varieties Cabernet Sauvignon and Shiraz (both down by $500 per tonne). The increased tonnages meant that income to growers from red varieties remained about the same, while income from whites more than doubled.

Intake of red varieties is forecast to remain at around the 2004 level, while intake of white varieties is expected to increase quite substantially, from 1,400 tonnes in 2004 to 5,300 tonnes in 2009.

Consistent with this forecast growth, there were 45 hectares of white varieties planted in 2003 (a 16% increase), and only 10 hectares (1%) of red varieties.

KANGAROO ISLAND GI REGION
## FLEURIEU ZONE (OTHER) TONNES CRUSHED BY VARIETY - VINTAGE 2004

### Table 8.1

<table>
<thead>
<tr>
<th>Variety</th>
<th>Own growers</th>
<th>Other growers</th>
<th>Total preferred</th>
<th>% of demand supplied</th>
</tr>
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<tr>
<td><strong>RED</strong></td>
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<tr>
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<td></td>
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</tr>
<tr>
<td>Cabernet Sauvignon</td>
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<td>2008</td>
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<tr>
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### FLEURIEU ZONE (OTHER) CROP VALUE DATA - VINTAGE 2004

**Table 8.2**

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<thead>
<tr>
<th>Variety</th>
<th>Grower grown</th>
<th>Total crushed (1)</th>
<th>purchased grapes</th>
<th>total grapes</th>
<th>price (2)</th>
<th>price (2)</th>
<th>calc average purchase value per tonne (3)</th>
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<tr>
<td>Cabernet Franc</td>
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<td>24</td>
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<td>$1,000 100%</td>
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<td>391</td>
<td>573</td>
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<td>$551,215</td>
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<td>$1,457</td>
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<td>Other red (group together)</td>
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<td>10</td>
<td>$4,820</td>
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<td>14</td>
<td>$8,556</td>
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<td>$1,222 100%</td>
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<td>149</td>
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<td>$1,100</td>
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<td>4283</td>
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<td>449</td>
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<td>$37,958</td>
<td>$37,958</td>
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<td>497</td>
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<td>$640,540</td>
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<td>$1,100 100%</td>
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<td>47</td>
<td>$41,500</td>
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<td></td>
<td>$882 100%</td>
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<td>40</td>
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<td><strong>Total WHITE</strong></td>
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<td>$1,687,647</td>
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</tbody>
</table>

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receiptal.
# Fleurieu Zone (Other) Estimated and Preferred Future Intake of Grapes 2005 to 2009

## Table 8.3

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<thead>
<tr>
<th>Variety</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
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<td><strong>RED</strong></td>
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</tr>
<tr>
<td>Cabernet Franc</td>
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<td>0</td>
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<td>0</td>
<td>8</td>
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<td>135</td>
<td>130</td>
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<td>4</td>
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<td>0</td>
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<td>Petit Verdot</td>
<td>40</td>
<td>40</td>
<td>40</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>Pinot Noir</td>
<td>159</td>
<td>149</td>
<td>119</td>
<td>119</td>
<td>119</td>
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<tr>
<td>Sangiovese</td>
<td>40</td>
<td>24</td>
<td>40</td>
<td>24</td>
<td>40</td>
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<tr>
<td>Shiraz</td>
<td>5041</td>
<td>4826</td>
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<td>4825</td>
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<td>30</td>
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<td>30</td>
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<td>2525</td>
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<td>6</td>
<td>6</td>
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<td>Riesling</td>
<td>71</td>
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<td>90</td>
<td>94</td>
<td>147</td>
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<tr>
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<td>512</td>
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<td>185</td>
<td>187</td>
<td>187</td>
<td>389</td>
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<td>84</td>
<td>84</td>
<td>84</td>
</tr>
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<td>40</td>
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<td>0</td>
<td>0</td>
</tr>
<tr>
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<td>2155</td>
<td>2446</td>
<td>2429</td>
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<td><strong>Total for region</strong></td>
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<td>12122</td>
<td>11993</td>
<td>10328</td>
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FLEURIEU ZONE (OTHER)* CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 8.4

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<th>Pre-1999</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>Total area</th>
<th>% planted in 2003</th>
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<tr>
<td>CABERNET SAUVIGNON</td>
<td>152</td>
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<td>100</td>
<td>44</td>
<td>5</td>
<td>5</td>
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<td>0</td>
<td>0</td>
<td>13</td>
<td>0%</td>
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<td>154</td>
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<td>55</td>
<td>1221</td>
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</tr>
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*Includes Currency Creek (656ha); Southern Fleurieu (330ha); Kangaroo Island (104ha) and Fleurieu zone - other (131ha).
Vintage report

The Langhorne Creek season started well for those on the flood plain, with two good flood events during the growing season. Some frost events occurred, followed later in the growing season by two extreme heat days, and this presented some challenges to the region, but otherwise it was a dry season with very low disease pressure.

Vintage started early and was constant with some reports of Shiraz and Cabernet Sauvignon intake overlapping and creating a little pressure on winery fermentation space.

Yields were a bit variable with above average yield for many on the flood plain and slightly below average in other areas. Yields look like averaging out to compare well with previous years.

Good, even ripening with good flavour development characterized the season. Flavour developed at a reasonable baume level with some reporting optimum fruit flavour at a slightly higher baume than in previous years. Acid levels have been quite low. Shiraz is again looking great with excellent fruit ripeness and depth of balance. A superb, quality vintage for Cabernet Sauvignon and parcels of Petit Verdot and Malbec. Cabernet Sauvignon in particular looks back to its best showing fabulous structure, colour – rich and black – and flavour. Chardonnay is reportedly the best in several years.

John Pargeter  
Langhorne Creek Grapegrowers’ Association

Overview of vintage statistics

Langhorne Creek had another record vintage in 2004, producing 54,360 tonnes. This region has shown steady growth from less than 10,000 tonnes in 1996. Despite this, record tonnages in the Barossa, McLaren Vale and Coonawarra meant that Langhorne Creek lost its position (from 2003) as the second largest producing region after the Riverland and dropped to fifth.

There was still a shortfall in Chardonnay, but Shiraz and Cabernet Sauvignon were oversupplied compared with wineries’ requirements.

Reflecting this result, the average purchase value of Shiraz and Cabernet Sauvignon was down by around $200 per tonne, while the average purchase value of Chardonnay increased very slightly.

The forecast is for intake of red varieties to grow to around 55,000 tonnes next year and remain at approximately that level. In last year’s survey the reported demand for 2008 was 68,000 tonnes; this year that figure has been revised downward to 56,000 tonnes. On the other hand, forecast demand for white varieties has been revised upward by 3,000 tonnes in each forecast year. Overall the region is expected to grow to around 70,000 tonnes over the next five years.

Anticipated growth is reflected in the planting figures for the 2003 planting season. There were over 200 hectares (4%) planted; however, these were mainly in red varieties. Production estimates suggest that there is a further planting requirement of 300 hectares to meet intake requirements for 2009 in white varieties (see table 1.9).
### LANGHORNE CREEK CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

**Table 9.1**

Current area in hectares by year planted

<table>
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<tr>
<th>Variety</th>
<th>Pre-1999</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>Total area</th>
<th>% planted in 2003</th>
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</tr>
<tr>
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<td>0</td>
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<td>193</td>
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<td>75</td>
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<td>24</td>
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</tr>
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<td>PETIT VERDOT</td>
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<td>0</td>
<td>0</td>
<td>54</td>
<td>0%</td>
</tr>
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<td>6</td>
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## LANGHORNE CREEK TONNES CRUSHED BY VARIETY - VINTAGE 2004

### Table 9.2

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<tr>
<th>Variety</th>
<th>Own</th>
<th>Other</th>
<th>Preferred</th>
<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>Tonnes from other growers as % of total</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
<th>Own</th>
<th>Other</th>
<th>Preferred</th>
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<td>100%</td>
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<td>69%</td>
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<td>100%</td>
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<td>1</td>
<td>1</td>
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<td>95%</td>
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<td>7</td>
<td>7</td>
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<td>38</td>
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<td>65%</td>
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### Table 9.3

**LANGHORNE CREEK CROP VALUE DATA - VINTAGE 2004**

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<tr>
<th>Variety</th>
<th>Grower grown</th>
<th>Total crushed (1)</th>
<th>purchased grapes</th>
<th>total grapes</th>
<th>lowest price (2)</th>
<th>highest price (2)</th>
<th>calc average purchase value per tonne (3)</th>
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</tr>
<tr>
<td>Barbera</td>
<td>4</td>
<td>4</td>
<td>$6,188</td>
<td>$6,188</td>
<td></td>
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<td>$1,400 100%</td>
</tr>
<tr>
<td>Cabernet Franc</td>
<td>37</td>
<td>97</td>
<td>$25,612</td>
<td>$66,791</td>
<td></td>
<td></td>
<td>$690 100%</td>
</tr>
<tr>
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<td>$200</td>
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<td>39</td>
<td>39</td>
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<td>$58,060</td>
<td></td>
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<td>$400</td>
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<td>$1,125 100%</td>
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<td>$139,013</td>
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<td>$500</td>
<td>$1,650</td>
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<td>30</td>
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<td>$33,418</td>
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<td>Other red (group together)</td>
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<tr>
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<td>456</td>
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<td>$900</td>
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<td>493</td>
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<td></td>
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<td>337</td>
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<td>$500</td>
<td>$1,772</td>
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<td></td>
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<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Chardonnay</td>
<td>2,606</td>
<td>4,657</td>
<td>$3,566,208</td>
<td>$6,372,156</td>
<td>$1,100</td>
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<tr>
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<td>12</td>
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<td>$2,109</td>
<td></td>
<td></td>
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<td>26</td>
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<td>$33,075</td>
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<td>$1,081,883</td>
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<td>51</td>
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<td>97</td>
<td>$77,280</td>
<td>$77,280</td>
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<td>74</td>
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</table>

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1. Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
2. The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
3. This does not include end use bonuses or other adjustments determined post-receipt.

---

*Phylloxera and Grape Industry Board of South Australia*
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<th>Variety</th>
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<th>2008</th>
<th>2009</th>
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<td>17</td>
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<td>93</td>
<td>44</td>
<td>93</td>
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<td>415</td>
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<td>4715</td>
<td>4219</td>
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<td>59</td>
<td>59</td>
<td>69</td>
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<td>537</td>
<td>499</td>
<td>567</td>
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<td>571</td>
<td>588</td>
<td>553</td>
<td>612</td>
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<td>570</td>
<td>294</td>
<td>570</td>
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<td>21493</td>
<td>24518</td>
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<td>10114</td>
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<td>7</td>
</tr>
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<td>8</td>
<td>23</td>
</tr>
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<td>65</td>
<td>111</td>
<td>75</td>
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<td>1535</td>
<td>1968</td>
<td>1968</td>
<td>2203</td>
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<td>70</td>
<td>70</td>
<td>80</td>
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<td>335</td>
<td>335</td>
<td>335</td>
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<td>126</td>
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<td>162</td>
<td>162</td>
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<td>665</td>
<td>690</td>
<td>690</td>
<td>715</td>
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<td>210</td>
<td>234</td>
<td>250</td>
<td>279</td>
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<tr>
<td><strong>Total for WHITE</strong></td>
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<td>11771</td>
<td>12117</td>
<td>13712</td>
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<tr>
<td><strong>Total for region</strong></td>
<td>64891</td>
<td>60310</td>
<td>67564</td>
<td>63798</td>
<td>71149</td>
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</table>

**Table 9.4**

Langhorne Creek estimated and preferred future intake of grapes 2005 to 2009.
LANGHORNE CREEK PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1992 - 2009

Figure 9.1

Past production and projections (major varieties)

PAST PRODUCTION

PROJECTIONS

Chardonnay

Merlot

Shiraz

Cabernet Sauvignon
LIMESTONE COAST ZONE (OTHER) VINTAGE OVERVIEW

Overview of vintage statistics

Limestone Coast (other) includes the plantings around Bordertown, Mt Benson, Robe, Lucindale, Beachport, Mount Gambier and plantings near but outside the declared GI regions of Padthaway, Coonawarra and Wrattonbully.

The area accounts for a total of 2881 hectares, and produced 30,183 tonnes in the 2004 vintage. This was double the crush of 2003. There was a substantial surplus in red varieties, with Merlot and Shiraz in particular being around twice the wineries’ preferred intake. There was also a surplus of white varieties; however, white varieties only make up 17% of the production of the region.

Projections indicate that intake of red varieties will be around 20,000 tonnes over the next five years (less than the 2004 vintage), and there will be a 100% surplus in each year (ie twice as much as wineries’ preferred intake) - mainly in Shiraz. White varieties are expected to grow from 4,000 tonnes in 2005 to around 4,400 tonnes in 2009 and to exceed demand in each forecast year.

There was very little new planting in the Limestone Coast zone (other) in 2003, in line with the lack of forecast growth for this area.

Note: crop value data is not presented in this report for Limestone Coast zone (other) as this is not a single, uniform region. However, the information is available on the Board’s website at www.phylloxera.com.au or on request from the office.
## LIMESTONE COAST ZONE (OTHER) CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

### Table 10.1

<table>
<thead>
<tr>
<th>Variety</th>
<th>Pre-1999</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>Total area</th>
<th>% planted in 2003</th>
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<tr>
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<td>8</td>
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<tr>
<td>Sauvignon Blanc</td>
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<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
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### LIMESTONE COAST ZONE (OTHER) TONNES CRUSHED BY VARIETY - VINTAGE 2004

**Table 10.2**

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<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>Tonnes from other growers as % of total supplied</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
<th>Own</th>
<th>Other</th>
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### LIMESTONE COAST (OTHER) ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

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2004 was a longer than usual vintage, attributed to cool conditions during ripening. It is expected that this will produce quality wines across both red and white wine styles.

Good winter and spring rainfall ensured good even budburst and enabled growers to maintain adequate soil moisture to ensure healthy grapevine canopies from veraison though to harvest, contributing to optimum flavour development. A warm dry November saw a rapid flowering period, which was followed by good berry set, and a quick even veraison. The coolest January in 12 years, followed by above average temperatures in February and dry conditions leading into harvest, optimised fruit flavours, sugar and acid levels. Despite two days in February above 44°C, shrivel and sunburn was minimal due to good canopies filtering the damaging effects of direct sunlight. As a result fruit condition at harvest was excellent.

Crop levels were up on previous seasons with a combination of good fruitfulness and many younger vineyards coming into full production, contributing to an increased yield. Despite this, the long ripening season took the pressure off fruit intake allowing wineries to schedule harvest when flavours and baume were at an optimum.

Winemakers’ comments centred on sensational Cabernet Sauvignons and top end Shiraz attributed to fruit reaching full flavour ripeness, excellent colour, and tannin with wines exhibiting great varietal flavours and aromas. Overall the quality of white varieties impressed, with fruit harvested at lower baumes producing fantastic wines.

Lucy Hyde, Viticulture Officer
McLaren Vale Grape Wine and Tourism

Overview of vintage statistics

McLaren Vale produced a record 71,515 tonnes in 2004, making it the second largest producing region in the state after the Riverland, for only the second time. There was an 8,000 tonne surplus of red varieties – mainly Cabernet Sauvignon – while white varieties (less than 14,000 tonnes in total) were in balance.

The calculated average purchase value of the major red varieties dropped by around $300 per tonne; however the income to growers from red varieties increased by 30% because of the increased tonnage. In white varieties, total income was up by 50%. The total value of grapes from the region increased from $70 million in 2003 to $98 million.

The forecast is for intake to stabilise at around 65,000 tonnes (below this year’s crush), with a small shortfall in red varieties by 2009. Shiraz is set to remain by far the most important variety for the region, accounting for around 50% of the total intake.

There were 38 hectares of Shiraz and 37 hectares of Chardonnay planted in the region in 2003. Production estimates based on the current vineyard area and using yield estimates of 10 t/ha for reds and 11 t/ha for whites show a shortfall of nearly 3,000 tonnes between preferred intake of white varieties and potential production. On the other hand, there is an estimated surplus of 4,500 tonnes of red varieties. While demand forecasts change from year to year, this discrepancy may foreshadow some problems for growers without a contract in future years.
## MCLAREN VALE CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

### Table 11.1

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<th>Variety</th>
<th>Pre-1999</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>Total area</th>
<th>% planted in 2003</th>
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### MCLAREN VALE TONNES CRUSHED BY VARIETY - VINTAGE 2004

**Table 11.2**

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<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
<th>Own</th>
<th>Other</th>
<th>Preferred</th>
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### Table 11.3

#### MCLAREN VALE CROP VALUE DATA - VINTAGE 2004

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<th>purchased grapes</th>
<th>total grapes</th>
<th>lowest price (2)</th>
<th>highest price (2)</th>
<th>calc average purchase price (3)</th>
<th>value per tonne (3)</th>
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<td>38</td>
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</table>

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.
## MCLAREN VALE ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

### Table 11.4

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<td>100</td>
<td>98</td>
<td>100</td>
<td>98</td>
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<td>442</td>
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<td><strong>51523</strong></td>
<td><strong>48303</strong></td>
<td><strong>50782</strong></td>
<td><strong>50004</strong></td>
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### WHITE

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<td>7689</td>
<td>8802</td>
<td>8036</td>
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<td>280</td>
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<td>15</td>
<td>15</td>
<td>16</td>
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<td>155</td>
<td>160</td>
<td>160</td>
<td>160</td>
<td>160</td>
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<td>10</td>
<td>10</td>
<td>10</td>
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<td>10</td>
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<tr>
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<td>26</td>
<td>26</td>
<td>26</td>
<td>26</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>Muscat Gordo Blanco</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
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<tr>
<td>Pedro Ximenes</td>
<td>43</td>
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<td>43</td>
<td>48</td>
<td>43</td>
<td>48</td>
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<td>0</td>
<td>17</td>
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<td>964</td>
<td>979</td>
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<td>105</td>
<td>110</td>
<td>110</td>
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<td>Sauvignon Blanc</td>
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<td>1830</td>
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<td>2013</td>
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<td><strong>13451</strong></td>
<td><strong>14525</strong></td>
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<td><strong>63783</strong></td>
<td><strong>65576</strong></td>
<td><strong>61754</strong></td>
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MCLAREN VALE PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2009

Figure 11.1

Past production and projections (major varieties)

Past production and projections for major varieties in McLaren Vale from 1991 to 2009. The graph shows the production in tonnes for Shiraz, Cabernet Sauvignon, Grenache, and Chardonnay over the years. The projections are indicated with a dashed line for Shiraz.
Vintage Report

The season began with a wet August – the first for a few years. Cool and windy conditions prevailed through September and October.

Budburst was very good and even through most varieties. Light early frosts gave some leaf damage in isolated pockets to fruit and leaf. While the damage looked bad the vines recovered extremely well with most going on to produce a reasonable crop.

Flowering happened over a short period in ideal conditions and the set in most varieties was excellent. This together with good shoot numbers led to very heavy crop loads.

Many growers had to thin crops to maintain quality and it was interesting to see a lot of mechanical thinning done with harvesters, quite effectively in most cases.

January was very cool and average temperatures were well below normal while February and March were warm. Mild weather continued through April and May.

Disease pressures were low with no real problems from mildew all season. There was some botrytis about in late summer and autumn; however, the weather was kind through the autumn and damage was slight.

Harvest was conducted in great weather conditions with little rain about. The heavy crop loads caused harvest to be later than normal, particularly in the red varieties.

Quality this season was excellent in the white varieties. The reds were very good, mainly due to the favourable weather during autumn allowing late ripening.

Ian Ward
President, Padthaway Grapegrowers Ass.

Overview of vintage statistics

Padthaway produced 51,130 tonnes this year – a massive increase of 85% compared with 2003. There were surpluses of most red varieties, and smaller surpluses of white varieties. An interesting finding was a significant increase in the share of purchased fruit in the white varieties – up from 19% to 27%. This probably reflects more crop-thinning in winery-owned vineyards to reduce yield.

The calculated average purchase value for Cabernet Sauvignon and Shiraz dropped by $500 per tonne or more. The average value per tonne of Chardonnay dropped by around $150. However, the total income for growers in the region increased by over 50%, and the estimated value of all grapes from the region increased from $38 million to $55 million.

The forecast is for a stabilisation in intake at around 38,000 tonnes (much less than the 2004 vintage), with whites increasing by 1,000 tonnes over the five years and reds decreasing by a similar amount. There is a consistent surplus of Cabernet Sauvignon.

Chardonnay remains the major variety for the region. It is set to increase its share of total intake over the forecast period from 27% to 36%, while its nearest rival – Shiraz - declines. Consistent with the lack of growth forecast for the region, there was very little new planting in the region in 2003, and the total area of registered vines actually declined slightly compared with the previous year.
## PADTHAWAY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

### Table 12.1

**Current area in hectares by year planted**

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<th>Variety</th>
<th>Pre-1999</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>Total area</th>
<th>% planted in 2003</th>
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<td>0</td>
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<td>0%</td>
</tr>
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<td>0</td>
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<td>0</td>
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<td>37</td>
<td>0%</td>
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<tr>
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<td>163</td>
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<td>0</td>
<td>0</td>
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<td>0</td>
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<td>0%</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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<td>0%</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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## PADTHAWAY TONES CRUSHED BY VARIETY - VINTAGE 2004

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<th>Total crushed</th>
<th>Total preferred</th>
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<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
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<td>126%</td>
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### PADTHAWAY CROP VALUE DATA - VINTAGE 2004

**Table 12.3**

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<th>Total crushed (1)</th>
<th>purchased grapes</th>
<th>total grapes</th>
<th>lowest</th>
<th>highest</th>
<th>calc average purchase</th>
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1. Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
2. The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
3. This does not include end use bonuses or other adjustments determined post-receipt.
## PADTHAWAY ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

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Figure 12.1

Past production and projections (major varieties)

PADTHAWAY PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 2000 - 2009

Past production and projections (major varieties)
Riverland

RIVERLAND VINTAGE OVERVIEW

Vintage Report

The 2004 vintage ran very smoothly, apart from some difficulties encountered in February due to excessive heat lasting about seven days or so, with temperatures in the mid to high 40’s. Some baumes jumped dramatically immediately after the heat which in turn caused some intake programming difficulties and a heart flutter for a day or two but then things settled down again. There was an extended period after this heat where baumes did not move for up to 3 to 4 weeks, and in some cases actually went backwards for some fruit, in particular Shiraz and Cabernet Sauvignon. This actually contributed to a smooth vintage in a record year, allowing fruit to be programmed into wineries over a longer period of time. There were no rain events and disease pressure was very low to non existent.

Overall a very smooth running vintage in a record year.

Bill Wilden, The Hardy Wine Company

Overview of vintage statistics

The Riverland produced 440,121 tonnes this year – 19% more than last year, and even breaking the previous record of 433,893 tonnes in 2002. There was an oversupply in Cabernet Sauvignon of 20,000 tonnes, and 10,000 tonne in Shiraz. The white varieties were in balance.

The average purchase value per tonne for the major red varieties Cabernet Sauvignon, Shiraz and Merlot dropped by $100 per tonne or more. On the other hand, the Chardonnay average purchase value was very similar to last year. Despite the lower average prices, total income to growers was slightly higher for red varieties ($115.4 million compared with $114 last year) and white varieties it was substantially higher ($89 million compared with $70 million).

The forecast for the Riverland is for a stabilisation in production of red varieties at around 280,000 tonnes and an intake in excess of requirements for Cabernet Sauvignon. In the minor varieties, there is expected to be a substantial excess intake of Ruby Cabernet, while Merlot and Grenache are in balance. There has been a further downward revision of 20,000 tonnes in the preferred intake figures for red varieties since the 2003 survey.

There has also been a slight downward revision in the preferred intake figures for white varieties since last year. It is now estimated that intake will decline to around 223,000 tonnes, with estimated and preferred intake being in balance.

It is important to note that these intake figures do not necessarily match the region’s production potential. A further 650 hectares were planted in the Riverland in 2003, giving a total area of 20,869 hectares. Based on current plantings, and using an estimated yield figure of 17 t/ha for reds, and 20 t/ha for whites, it is estimated that the production from the region in 2009 will be 375,000 tonnes. This means a shortfall of around 125,000 tonnes. A further 6,000 hectares would need to be planted by 2006 to address this shortfall – assuming it could not be met from other regions or by adjusting yields.
## Table 13.1

**Current area in hectares by year planted**

<table>
<thead>
<tr>
<th>Variety</th>
<th>Pre-1999</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>Total area</th>
<th>% planted in 2003</th>
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<tr>
<td><strong>RED WINEGRAPE</strong></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Cabernet Sauvignon</td>
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<td>365</td>
<td>131</td>
<td>57</td>
<td>20</td>
<td>12</td>
<td>3625</td>
<td>0%</td>
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<tr>
<td>Grenache</td>
<td>436</td>
<td>49</td>
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<td>2</td>
<td>1</td>
<td>510</td>
<td>0%</td>
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<td>Malbec</td>
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<td>0</td>
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<td>0</td>
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</tr>
<tr>
<td>Mataro (Mouvedre)</td>
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<td>Merlot</td>
<td>854</td>
<td>92</td>
<td>45</td>
<td>92</td>
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<td>25</td>
<td>1138</td>
<td>2%</td>
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<td>Petit Verdot</td>
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<td>79</td>
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<td>632</td>
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<td>0</td>
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<td>Shiraz</td>
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<td>104</td>
<td>109</td>
<td>150</td>
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<td><strong>TOTAL RED WINEGRAPE</strong></td>
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<td>1292</td>
<td>553</td>
<td>393</td>
<td>208</td>
<td>193</td>
<td>12452</td>
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<td><strong>WHITE WINEGRAPE</strong></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
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<td>29</td>
<td>102</td>
<td>632</td>
<td>586</td>
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<td>0</td>
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<td>114</td>
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<td>Sauvignon Blanc</td>
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<td>0</td>
<td>8</td>
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<td>8</td>
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<td>15</td>
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<td>3</td>
<td>63</td>
<td>4%</td>
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<td>Other White</td>
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<td>0</td>
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<td><strong>TOTAL WHITE WINEGRAPE</strong></td>
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<td>1221</td>
<td>927</td>
<td>653</td>
<td>20869</td>
<td>3%</td>
</tr>
</tbody>
</table>

*Note: some increase in area in this region is a result of including previously unregistered growers with older plantings.*
Table 13.2

RIVERLAND TONNES CRUSHED BY VARIETY (RED) - VINTAGE 2004

<table>
<thead>
<tr>
<th>Variety</th>
<th>Own</th>
<th>Other</th>
<th>Preferred</th>
<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
<th>% of demand from other growers as % of total supplied</th>
</tr>
</thead>
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<tr>
<td>Barbera</td>
<td>0</td>
<td>45</td>
<td>45</td>
<td>50</td>
<td>0</td>
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<td>90%</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Cabernet Franc</td>
<td>0</td>
<td>193</td>
<td>193</td>
<td>105</td>
<td>0</td>
<td>100%</td>
<td>184%</td>
<td>0%</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Cabernet Sauvignon</td>
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<td>61359</td>
<td>70597</td>
<td>51504</td>
<td>87%</td>
<td>137%</td>
<td>10%</td>
<td>1%</td>
<td>10</td>
<td>23%</td>
</tr>
<tr>
<td>Carignan</td>
<td>318</td>
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<td>346</td>
<td>200</td>
<td>8%</td>
<td>173%</td>
<td>0%</td>
<td>0%</td>
<td>0</td>
<td>100%</td>
</tr>
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<td>100%</td>
<td>100%</td>
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<td>0%</td>
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<td>138%</td>
<td>0%</td>
<td>0%</td>
<td>0</td>
<td>100%</td>
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<tr>
<td>Durif</td>
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<td>41</td>
<td>30</td>
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<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Grenache</td>
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<td>7592</td>
<td>93%</td>
<td>128%</td>
<td>0%</td>
<td>0%</td>
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<td>100%</td>
</tr>
<tr>
<td>Malbec</td>
<td>463</td>
<td>413</td>
<td>877</td>
<td>825</td>
<td>47%</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>4</td>
<td>100%</td>
</tr>
<tr>
<td>Mataro (Mouvedre)</td>
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<td>7754</td>
<td>7778</td>
<td>4221</td>
<td>100%</td>
<td>184%</td>
<td>2%</td>
<td>2%</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>Merlot</td>
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<td>24982</td>
<td>92%</td>
<td>98%</td>
<td>7%</td>
<td>18%</td>
<td>17%</td>
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<td>100%</td>
<td>100%</td>
<td>0%</td>
<td>1%</td>
<td>1</td>
<td>100%</td>
</tr>
<tr>
<td>Nebbiolo</td>
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<td>17</td>
<td>18</td>
<td>100%</td>
<td>95%</td>
<td>0%</td>
<td>2%</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Other red</td>
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<td>285</td>
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<td>84%</td>
<td>635%</td>
<td>2%</td>
<td>1%</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>Petit Verdot</td>
<td>854</td>
<td>12413</td>
<td>13267</td>
<td>11009</td>
<td>94%</td>
<td>121%</td>
<td>6%</td>
<td>16%</td>
<td>17</td>
<td>100%</td>
</tr>
<tr>
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<td>334</td>
<td>5085</td>
<td>5419</td>
<td>5385</td>
<td>94%</td>
<td>101%</td>
<td>1%</td>
<td>5%</td>
<td>6</td>
<td>100%</td>
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<td>68%</td>
<td>1%</td>
<td>3%</td>
<td>3</td>
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<td>221%</td>
<td>4%</td>
<td>10%</td>
<td>9</td>
<td>100%</td>
</tr>
<tr>
<td>Sangiovese</td>
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<td>456</td>
<td>820</td>
<td>477</td>
<td>56%</td>
<td>172%</td>
<td>3%</td>
<td>5%</td>
<td>5</td>
<td>100%</td>
</tr>
<tr>
<td>Shiraz</td>
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<td>101706</td>
<td>113360</td>
<td>102999</td>
<td>90%</td>
<td>110%</td>
<td>11%</td>
<td>24%</td>
<td>27</td>
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<td>1487</td>
<td>56%</td>
<td>106%</td>
<td>1%</td>
<td>3%</td>
<td>3</td>
<td>100%</td>
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<td>Tempranillo</td>
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<td>151</td>
<td>177</td>
<td>172</td>
<td>85%</td>
<td>103%</td>
<td>1%</td>
<td>4%</td>
<td>5</td>
<td>100%</td>
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<td>Tinta Molle</td>
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<td>101%</td>
<td>1%</td>
<td>0%</td>
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<td>100%</td>
<td>3%</td>
<td>2%</td>
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<td>100%</td>
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<td>36</td>
<td>0</td>
<td>100%</td>
<td>100%</td>
<td>0%</td>
<td>1%</td>
<td>0</td>
<td>100%</td>
</tr>
</tbody>
</table>

Total RED | 28122 236409 264531 218479 | 89% | 121% |
## RIVERLAND TONNES CRUSHED BY VARIETY (WHITE) - VINTAGE 2004

### Table 13.3

<table>
<thead>
<tr>
<th>Variety</th>
<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>Tonnes from other growers as % of total</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
<th>Own</th>
<th>Other</th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biancone</td>
<td>619</td>
<td>169</td>
<td>788</td>
<td>454</td>
<td>21%</td>
<td>173%</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Canada Muscat</td>
<td>0</td>
<td>107</td>
<td>107</td>
<td>107</td>
<td>100%</td>
<td>100%</td>
<td>0</td>
<td>2</td>
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<td>Chardonnay</td>
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<td>78276</td>
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<td>97%</td>
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<td>111%</td>
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<td>98%</td>
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<td>14</td>
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<td>100%</td>
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<td>2868</td>
<td>2275</td>
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<td>126%</td>
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<td>308</td>
<td>307</td>
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<td>100%</td>
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<td>306</td>
<td>82%</td>
<td>132%</td>
<td>2</td>
<td>3</td>
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<td>91%</td>
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<td>90%</td>
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<td>767</td>
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<td>3</td>
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<td>2</td>
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<td>100%</td>
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<td>Viognier</td>
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<td><strong>98%</strong></td>
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<td><strong>385492</strong></td>
<td><strong>440121</strong></td>
<td><strong>397797</strong></td>
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</table>

**WINEGRAPE UTILISATION AND PRICING SURVEY 2004**
## RIVERLAND CROP VALUE DATA (RED) - VINTAGE 2004

### Table 13.4

<table>
<thead>
<tr>
<th>Variety</th>
<th>Grower grown</th>
<th>Total crushed (1)</th>
<th>purchased grapes</th>
<th>total grapes</th>
<th>price (2)</th>
<th>price (2)</th>
<th>value per tonne (3)</th>
<th>calc average purchase</th>
</tr>
</thead>
<tbody>
<tr>
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<td>45</td>
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<td>$15,437</td>
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<td>193</td>
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<td>$600</td>
<td>$472</td>
<td>100%</td>
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<td>Cabernet Sauvignon</td>
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<td>$397</td>
<td>100%</td>
</tr>
<tr>
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<td>182</td>
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<td>$103,413</td>
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<td>177</td>
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</tbody>
</table>

1. Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
2. The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
3. This does not include end use bonuses or other adjustments determined post-receipt.
## Table 13.5

<table>
<thead>
<tr>
<th>Variety</th>
<th>Grower grown</th>
<th>Total crushed (1)</th>
<th>purchased grapes</th>
<th>total grapes</th>
<th>lowest price (2)</th>
<th>highest price (2)</th>
<th>calc average purchase</th>
<th>value per tonne (3)</th>
</tr>
</thead>
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<td>75688</td>
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<td>$67,884,867</td>
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<td>$1,200</td>
<td>$897</td>
<td>100%</td>
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</tr>
<tr>
<td>Muscadelle (Tokay)</td>
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<td>$464</td>
<td>$343</td>
<td>100%</td>
</tr>
<tr>
<td>Other white</td>
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<td>245</td>
<td>$76,553</td>
<td>$93,213</td>
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<td>$381</td>
<td>100%</td>
</tr>
<tr>
<td>Palomino</td>
<td>151</td>
<td>532</td>
<td>$37,721</td>
<td>$132,854</td>
<td>$150</td>
<td>$255</td>
<td>$250</td>
<td>100%</td>
</tr>
<tr>
<td>Pedro Ximenes</td>
<td>182</td>
<td>182</td>
<td>$45,222</td>
<td>$45,222</td>
<td>$230</td>
<td>$255</td>
<td>$249</td>
<td>100%</td>
</tr>
<tr>
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<td>$1,302</td>
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<td>$1,000</td>
<td>$541</td>
<td>100%</td>
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<td>$330</td>
<td>$293</td>
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<td>$328</td>
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</tr>
<tr>
<td>Taminga</td>
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<td>159</td>
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<td>$54,260</td>
<td>$250</td>
<td>$420</td>
<td>$342</td>
<td>100%</td>
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<td>$325</td>
<td>$276</td>
<td>100%</td>
</tr>
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<td>2407</td>
<td>$1,035,551</td>
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<td>$325</td>
<td>$550</td>
<td>$448</td>
<td>100%</td>
</tr>
<tr>
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<td><strong>$105,069,021</strong></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
(3) This does not include end use bonuses or other adjustments determined post-receival.
## RIVERLAND ESTIMATED AND PREFERRED FUTURE INTAKE OF RED GRAPES 2005 TO 2009

### Table 13.6

<table>
<thead>
<tr>
<th>Variety</th>
<th>2005</th>
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<th>2007</th>
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**Total for RED**

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### RIVERLAND ESTIMATED AND PREFERRED FUTURE INTAKE OF WHITE GRAPES 2005 TO 2009

**Table 13.7**

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<td>1384</td>
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<td>220997</td>
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<td>464682</td>
<td>521602</td>
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RIVERLAND PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1991 - 2009

Past production and projections (major varieties)

Figure 13.1

PAST PRODUCTION

PROJECTIONS

Chardonnay

Shiraz

Cabernet Sauvignon

Colombard

Merlot

Muscat Gordo Blanco

Tonnes

140000
120000
100000
80000
60000
40000
20000
0

RIVERLAND TOTAL PRODUCTION 1996 - 2004

Historical production Riverland region 1996 - 2004

Figure 13.2
WRATTONBULLY VINTAGE OVERVIEW

Vintage report

Wrattonbully bounced back from the lower yielding previous vintages with very good crops across all varieties, and a relatively easy growing period. Vine vigour matched fruitfulness to find that crops matured adequately – even if slightly later than normal. For those who crop thinned, there were some outstanding results with a lot learned from the exercise.

The vibrant season saw vine canopies in excellent condition, very few pests and diseases of note, and a very much reduced requirement for supplementary irrigation. Heat Degree Day units = 1393 against a long term average of 1508, with low figures every other month indicating a ‘see-saw’ type of growing season benefiting the early ripening varieties the most. Cabernet proved to be the pick of the reds – the ‘Indian summer’ conditions at the end, a key factor.

Rain always creates some anxiety during harvest, with conditions in late March causing some late Botrytis – very close to the point of picking.

Peter Bird and Peter Freckleton
Wrattonbully Grapegrowers’ Association

Overview of vintage statistics

Wrattonbully produced 28,451 tonnes in 2004 – more than double the previous vintage. As in many regions, there was a surplus of red varieties (nearly 6,000 tonnes) but whites were in balance. NB Whites account for less than 10% of the production of this region.

While the calculated average purchase value of Shiraz and Cabernet Sauvignon each fell by around $300 per tonne, the total income to growers from red varieties doubled because of the large tonnages, and the total estimated value of grapes from the region increased from $20 million in 2003 to $36.5 million in 2004.

The forecast is for intake of red varieties to remain at around 20,000 tonnes, and white varieties at 2,000 tonnes. There has been a substantial downward revision in the wineries’ preferred intake figure compared with last year’s survey. Last year there was a 14,000 tonne shortfall between estimated and preferred intake of red varieties in 2008, whereas this year there is a 1,000 tonne surplus.

There was a significant amount of new planting in the region in 2003: in particular 27 hectares (17% increase) of Chardonnay and 41 hectares (7% increase) of Shiraz. Production estimates show that, based on current plantings, the region can be expected to produce around 23,000 tonnes in 2009, giving an approximate surplus of 3,000 tonnes (mainly red varieties) between production and preferred intake. However, as illustrated above, demand forecasts can change substantially from year to year in accordance with changes in market conditions.
## WRATTONBULLY CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

### Table 14.1

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<th>Variety</th>
<th>Pre-1999</th>
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<th>2000</th>
<th>2001</th>
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## WRATTONBULLY TONNES CRUSHED BY VARIETY - VINTAGE 2004

### Table 14.2

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<th>Total winery grown</th>
<th>Total other growers</th>
<th>Total crushed</th>
<th>Total preferred</th>
<th>Tonnes from other growers as % of total</th>
<th>% of demand supplied</th>
<th>Number of wineries reporting tonnages (&gt; 0) for</th>
<th>Own</th>
<th>Other</th>
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### WRATTONBULLY CROP VALUE DATA - VINTAGE 2004

#### Table 14.3

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<th>Variety</th>
<th>Grower grown</th>
<th>Total crushed (1)</th>
<th>estimated total value</th>
<th>lowest price (2)</th>
<th>highest price (2)</th>
<th>calc average purchase value per tonne (3)</th>
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<td>purchased grapes</td>
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1. Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.
2. The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.
3. This does not include end use bonuses or other adjustments determined post-receival.
### Table 14.4

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<th>Variety</th>
<th>2005</th>
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<th>2007</th>
<th>2008</th>
<th>2009</th>
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<tr>
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Past production and projections (major varieties)

Past production and projections for major varieties 2001 - 2009

Figure 14.1