South Australian Winegrape Utilisation and Pricing Survey 2007

Phylloxera and Grape Industry Board of South Australia

ACKNOWLEDGEMENTS

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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 2007. The information is provided voluntarily by wineries on the understanding and assurance that information from individual wineries will be kept strictly confidential. Only aggregate responses are reported. Draft results are checked by regional industry representatives. Vintage reports have been provided by the regional representatives or their local committees. Particular thanks go to: Max Arney, Pete Balnaves, Jim Caddy, Chris Duffy, David Handyside, Graham Kaye, Greg Koch, Robin Nettelbeck, Craig Richards, Alex Sas, Mark Shaw and Kirsty Waller.

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

REPORT PREPARATION

Report prepared by Sandy Hathaway, Phylloxera and Grape Industry Board of SA. Layout by Leighset Design. Printed by Centreprint, Adelaide. September 2007.

COVER DESIGN

Photograph of Padthaway vineyard by David Owen, Orlando Wines. Cover design by Jess Anderson-Roberts, Centreprint.

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DOCUMENT STRUCTURE AND LAYOUT

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

INTERPRETATION OF REPORT INFORMATION

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

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Explanations and Definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with declared or interim Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu, Southern Flinders Ranges and Mount Benson is available on request from the Board's office.

Total crush

The **total crushed** is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia who source fruit from South Australian vineyards are included in the survey collection process. Reported fruit is separated into fruit produced from the winery's own vineyards ("own grown") and from independent grower owned vineyards ("purchased").

Crop value data

On the survey forms, wineries are asked to record **total purchase value.** This is the total amount paid for fruit of a particular variety at the point of receival – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted.

The **calculated average purchase value per tonne** is the average amount paid per tonne of fruit across all wineries. Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements. The **estimated total value of purchased grapes** is calculated by multiplying the average purchase value per tonne by the total tonnes purchased. The **estimated total value of total grapes** is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

Note: in small varieties there may sometimes be only one winery contributing towards a calculated average purchase value per tonne.

Important note on average purchase value

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts. Therefore the average price should not be compared directly with an individual grower's arrangement.

Highest and lowest price

Wineries are asked to report the highest and lowest prices paid for any parcel of fruit of a particular variety, of any size. The highest of all highest prices, and the lowest of all lowest prices are reported – provided that at least three wineries have provided this information for any particular variety. *Note: the highest or lowest price may be for a very small parcel of fruit - and/or reflect an unusual pricing arrangement - eg payment by the hectare rather than per tonne, "spot market" sales of excess fruit etc.*

FORECASTS

Estimated supply

Supply forecasts have been calculated using planting data contained in the Phylloxera and Grape Industry Board's vineyard register – ie they are independent of the Utilisation and Pricing survey. Estimated bearing area is multiplied by expected yield per hectare, to give estimated production. The supply forecasts do not make any allowance for large-scale grubbings, yield capping or the effects of ongoing water restrictions or unusual seasonal conditions.

Committed intake

Committed intake is the amount of fruit that wineries are *already* committed to take in, for a given future year. It is made up of winery grown fruit and contract purchases. Only existing or ongoing contracts are included – not intended future signings or renewals.

Explanations and Definitions

Available supply

Available supply (uncommitted fruit) is the difference between estimated supply and committed intake. It is the amount of fruit estimated to be available on the open (spot) market.

Demand (required intake)

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

The % required/committed intake shows the percentage of the wineries' requirement that is *already* committed for a given year. Eg a figure of 83% indicates that wineries already have contracts (or own grown fruit) to supply 83% of their demand for that year.

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

Comparing supply and demand

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

PLANTING DATA

Derivation of planting data tables

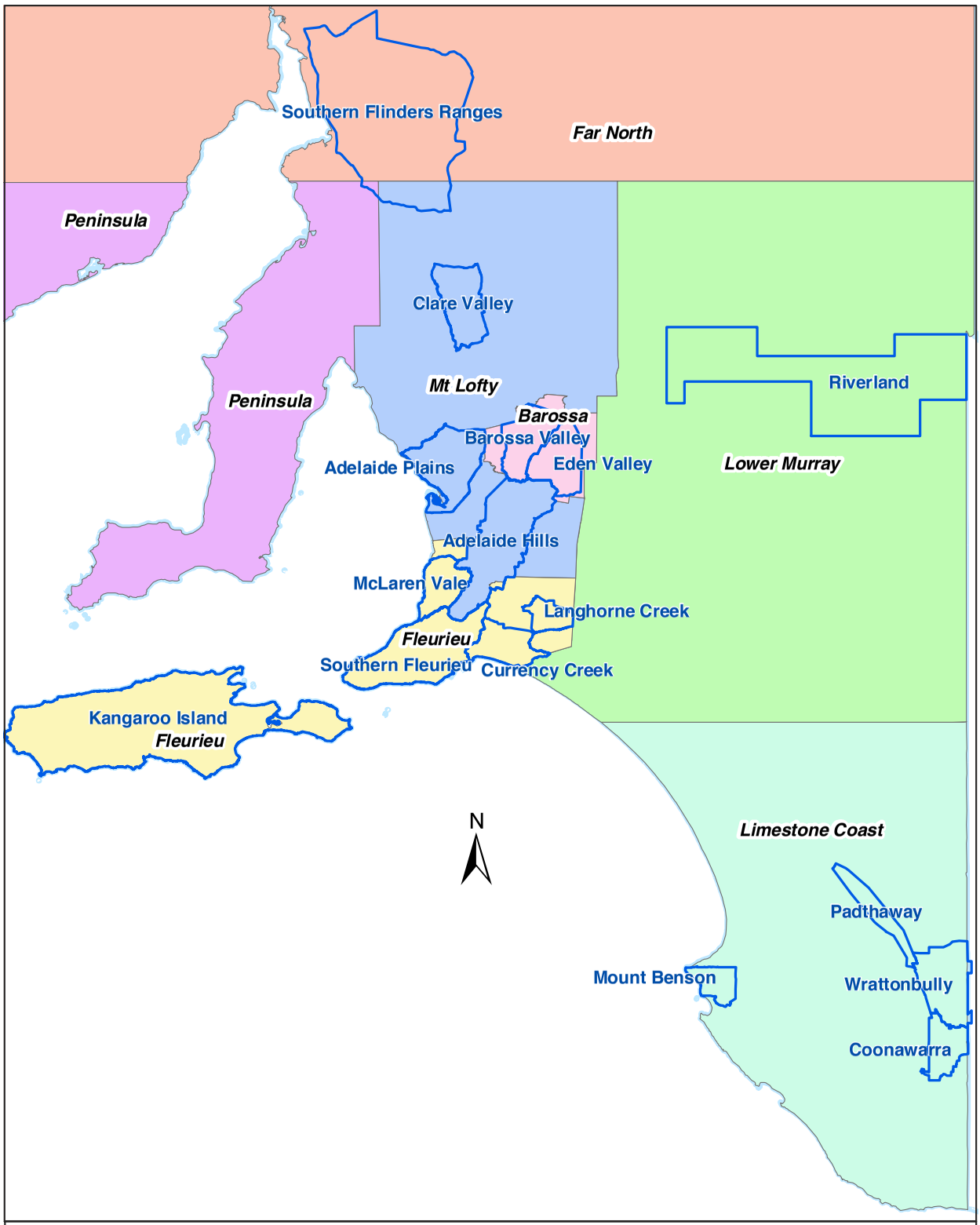
Planting data is **not** derived from the 2007 South Australian Utilisation and Pricing Survey of wineries. The information is obtained from the vineyard register maintained by the Phylloxera and Grape Industry Board of South Australia.

The Board is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of grapegrowers in the state. All vineyard owners with more than 0.5 hectares are required by law to register with the Board, and to complete an accurate vineyard return each year, giving details of their plantings. This information is kept strictly confidential. An accurate vineyard register enables the Board to produce complete, up-to-date statistical information on vineyard plantings by variety, year planted and location.

For more information on registration of vineyards, please contact the Phylloxera and Grape Industry Board office on 08 8362 0488.

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2007 and include all plantings from the 2006 planting season. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the 2007 report compared with previous reports.
2. Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from the Board.
3. Where a 0 appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce a slight error in totals or percentages.



GI Regions and Zones in South Australia

Legend

Geographic Indicatons (Wine Regions)

GI Zones

Barossa, Far North, Fleurieu, Limestone Coast, Lower Murray, Mt Lofty, Peninsula

0 30 60 90 Kilometres

Map Produced by the Phylloxera & Grape Industry Board of SA, 2006

Data Acknowledgements:
GI Regions/ Zones - Aust. Wine & Brandy Corporation

2007

State summary

Overview of vintage statistics 2007

State and regional overview

The total crush of South Australian winegrapes in 2007 was 575,111 tonnes. This was 36% below the 2006 harvest, and was the lowest crush since 2000. A combination of drought, water restrictions and widespread frost was responsible for a reduced crop in most regions.

The Riverland crush was down 30%, while Coonawarra, Padthaway and Wrattonbully were all down by more than 50%. Outside of the Riverland, the largest crush was from Langhorne Creek, which harvested a few hundred tonnes more than the Barossa Valley, and 5,000 tonnes more than McLaren Vale.

The total estimated purchase value of the crush was $420 million, down by nearly $200 million (30%) from last year. The average purchase value per tonne across the state was up, from $636 per tonne in 2006 to $730 per tonne.

Varietal overview

The red crush was 322,583 tonnes; the white crush was 252,529 tonnes. Chardonnay increased its share of total production to 24% from 19%, making it the equal top variety with Shiraz and ending the long dominance of Shiraz in South Australia. Across all varieties, the proportion of purchased fruit was 80%, with wineries' own grown fruit accounting for 20%.

Vineyard plantings

Planting data derived from the Phylloxera and Grape Industry Board's vineyard register shows that there were 76,378 hectares planted to vines in South Australia at 30 April 2007. Of these, 866 hectares (1%) were planted in 2006. New planting of red varieties declined significantly again (273 hectares compared with 396 in 2005, 589 hectares in 2004 and 809 hectares in 2003), while new planting of white varieties also declined slightly (592 hectares compared with 612 hectares in 2005) but is still showing some growth (3%). Once again, new plantings of white varieties more than doubled that of red varieties.

There are 2108 growers (58%) with properties smaller than 10 hectares; they only account for 13% of the total vineyard area, while there are 118 growers (3%) who have properties larger than 100 hectares (in one region) and these account for 38% of the vineyard area.

Projections

Using the planting data, production forecasts can be produced, using industry estimated average yield figures for each variety and region. The estimated production for 2008 is around 690,000 tonnes. This assumes a water allocation in the irrigated areas of 40% by February 2008; however, this is by no means assured and production could be substantially lower if worst-case scenarios of spring rainfall eventuate.

The estimated production of grapes for South Australia in 2012 is around 1,030,000 tonnes. This estimate is based on the assumption of a return to "normal" growing conditions and does not take into account any residual effects of drought and water restrictions. Considering that the state produced around 980,000 tonnes in 2006, it is likely that the production potential in five years time will exceed 1 million tonnes.

Committed intake and available supply

Wineries are asked to specify their *committed intake* for each forecast year – ie the amount of fruit that is *already* contracted or will be own grown. Given the expected low supply in many regions in 2008, it is likely that committed intake will match supply and there will be very little fruit available on the open market.

Supply vs demand forecasts

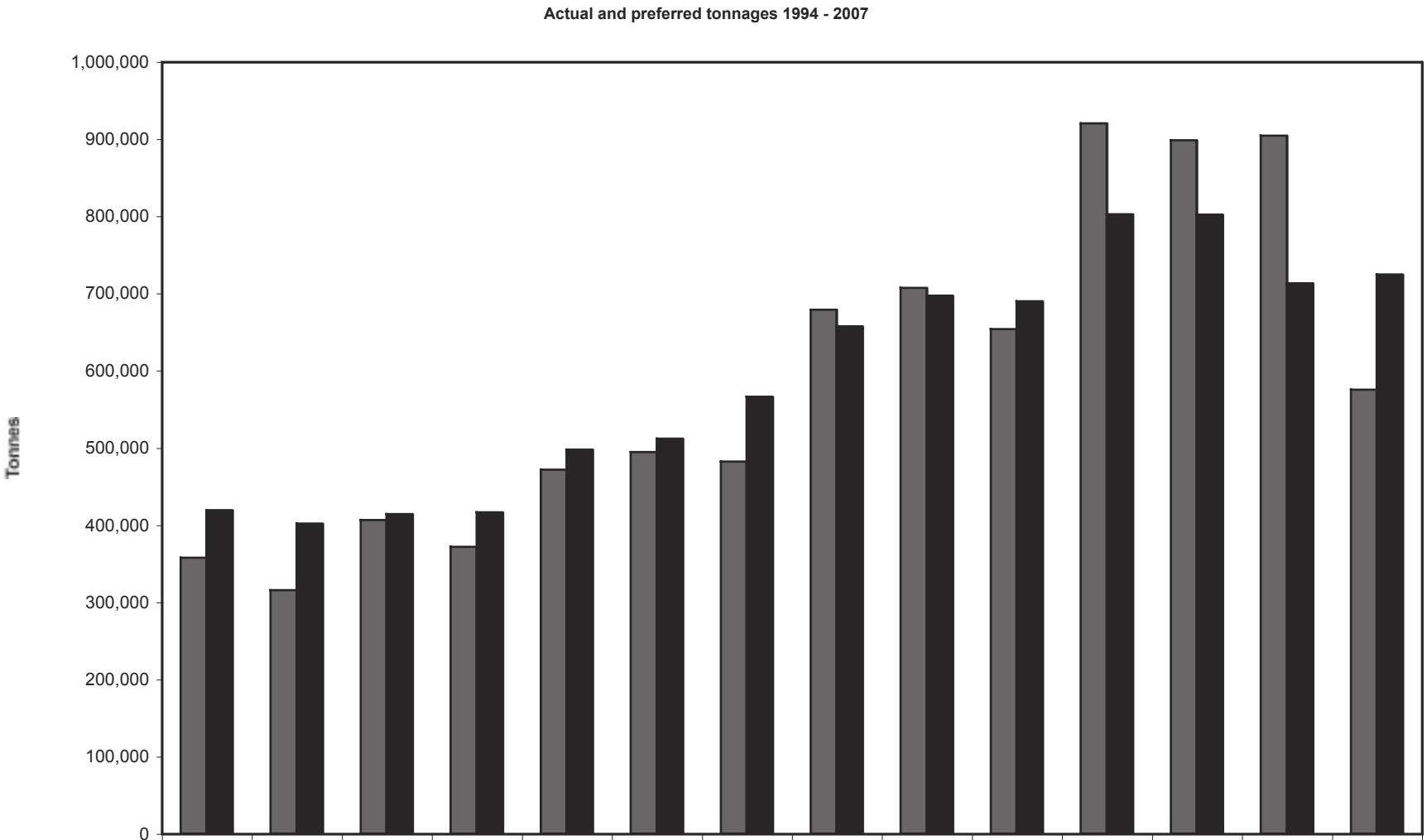
Demand forecasts are only published at the state level, because a significant amount of fruit is interchangeable between regions and therefore it can be misleading to assign demand to a specific region.

At a state level, the demand forecast is for 838,000 tonnes in 2008 – substantially higher than was indicated last year, as a result of the shortfalls in 2007.

By 2012, the demand forecast increases to 943,000 tonnes – slightly below the expected production of over 1 million tonnes. The already committed intake is 688,000 tonnes, which means a spot market demand of around 250,000 tonnes, and an available supply of 312,000 tonnes. This means that there is a potential small surplus of around 60,000 tonnes (6%) across the state in that year. Compared with the 2006 survey, when the forecast was for a 170,000 tonne surplus by 2011, the results now indicate that supply and demand for winegrapes should be close to balanced in five years' time, with shortfalls possible in the meantime. However, if crops are drastically reduced in the next two years, this will affect demand and supply outlooks substantially.

State summary

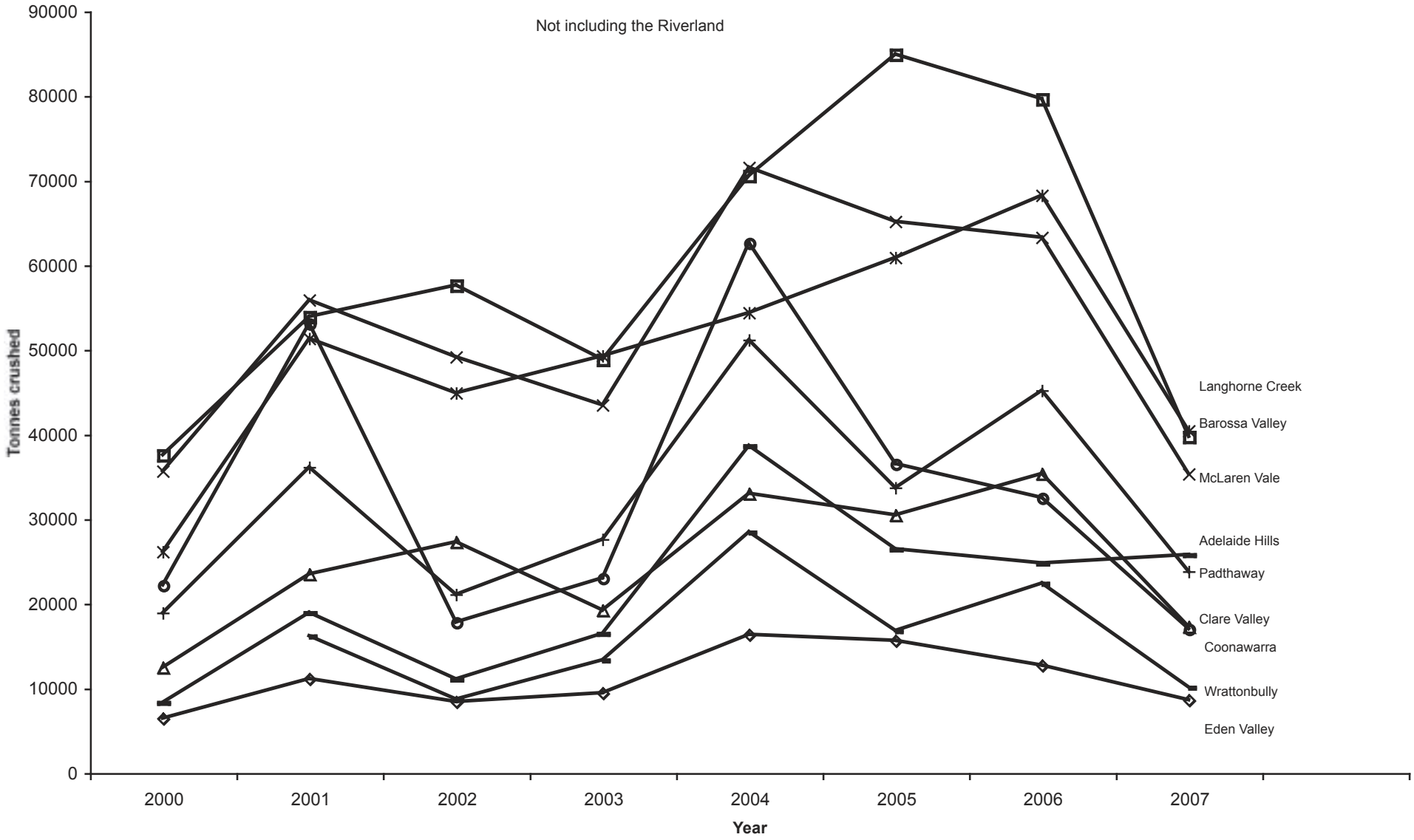
Historical production chart 1994 - 2007



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

State summary

Vintage by region 2000 - 2007



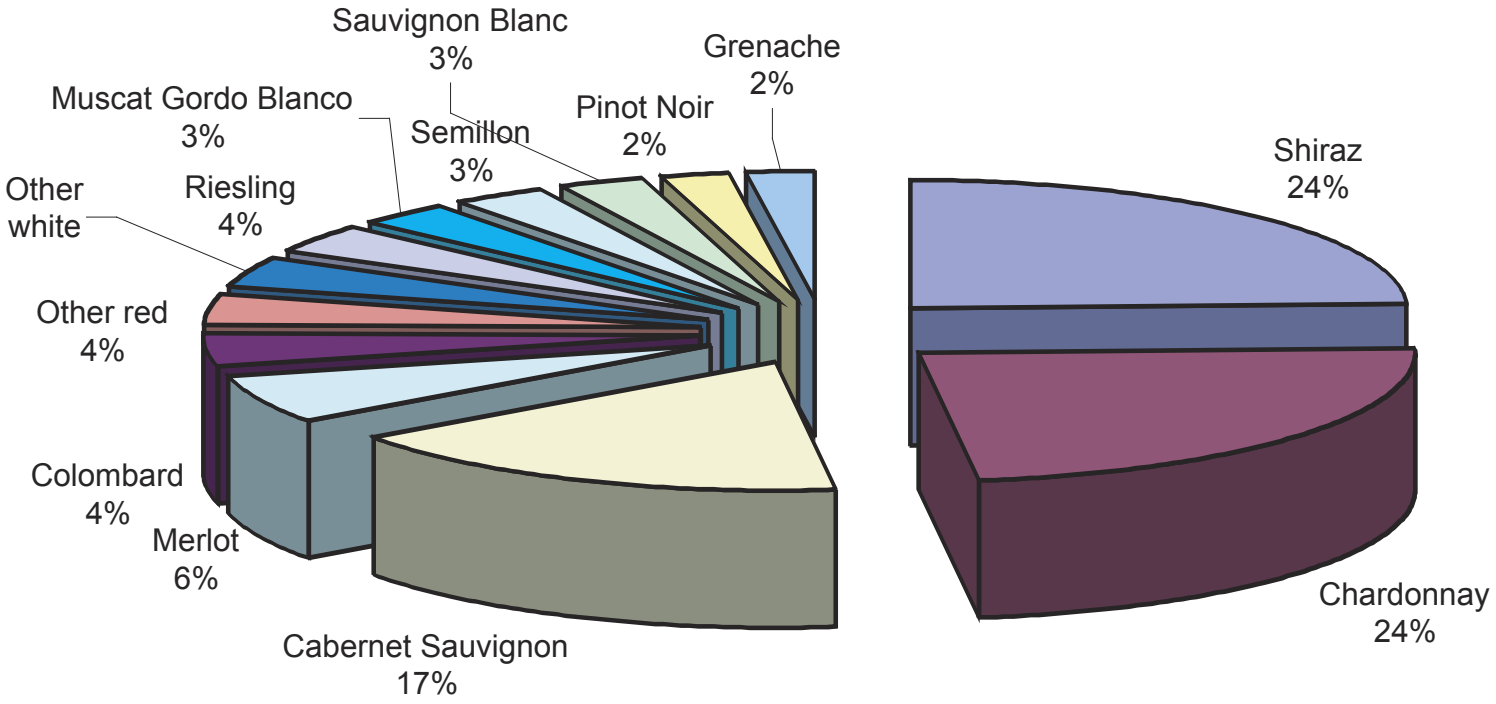
State summary

Vintage summary by variety 2007

Variety	Tonnes purchased	Winery grown fruit	Total crushed	% purchased	Est total value of crush
Red winegrapes					
Cabernet Franc	492	428	920	*53%*	$627,547
Cabernet Sauvignon	73,521	23,651	97,172	*76%*	$70,741,688
Grenache	10,150	2,907	13,057	*78%*	$8,506,279
Malbec	713	369	1,082	*66%*	$784,424
Mataro	3,988	455	4,444	*90%*	$2,374,088
Merlot	25,495	9,358	34,853	*73%*	$24,827,537
Other Red	1,532	651	2,183	*70%*	$1,931,476
Petit Verdot	7,345	2,024	9,369	*78%*	$4,155,425
Pinot Noir	11,059	2,146	13,205	*84%*	$14,795,215
Ruby Cabernet	2,819	673	3,492	*81%*	$990,295
Sangiovese	917	513	1,430	*64%*	$1,285,969
Shiraz	113,880	26,930	140,810	*81%*	$114,309,204
Tempranillo	443	122	566	*78%*	$494,746
Total red winegrapes	**252,355**	**70,228**	**322,583**	***78%***	**$245,823,893**
% of grand total	*55%*	*60%*	*56%*		*62%*
White winegrapes					
Chardonnay	115,239	20,416	135,655	*85%*	$72,727,034
Chenin Blanc	2,757	411	3,168	*87%*	$1,020,308
Colombard	22,263	1,523	23,786	*94%*	$7,197,241
Muscat Gordo Blanco	18,483	291	18,773	*98%*	$6,988,104
Other White	3,486	2,239	5,725	*61%*	$2,397,348
Pinot Gris	1,491	772	2,263	*66%*	$4,057,418
Riesling	12,420	8,445	20,864	*60%*	$17,768,246
Sauvignon Blanc	9,858	5,077	14,935	*66%*	$19,317,448
Semillon	11,769	5,426	17,195	*68%*	$11,003,715
Sultana	908	0	908	*100%*	$222,730
Traminer	1,871	1,180	3,052	*61%*	$1,864,382
Verdelho	2,245	857	3,102	*72%*	$1,885,201
Viognier	2,388	713	3,101	*77%*	$3,528,447
Total white winegrapes	**205,177**	**47,352**	**252,529**	***81%***	**$149,977,624**
% of grand total	*45%*	*40%*	*44%*		*38%*
Total all winegrapes	**457,531**	**117,580**	**575,111**	***80%***	**$395,801,518**

State summary

Vintage summary by variety 2007



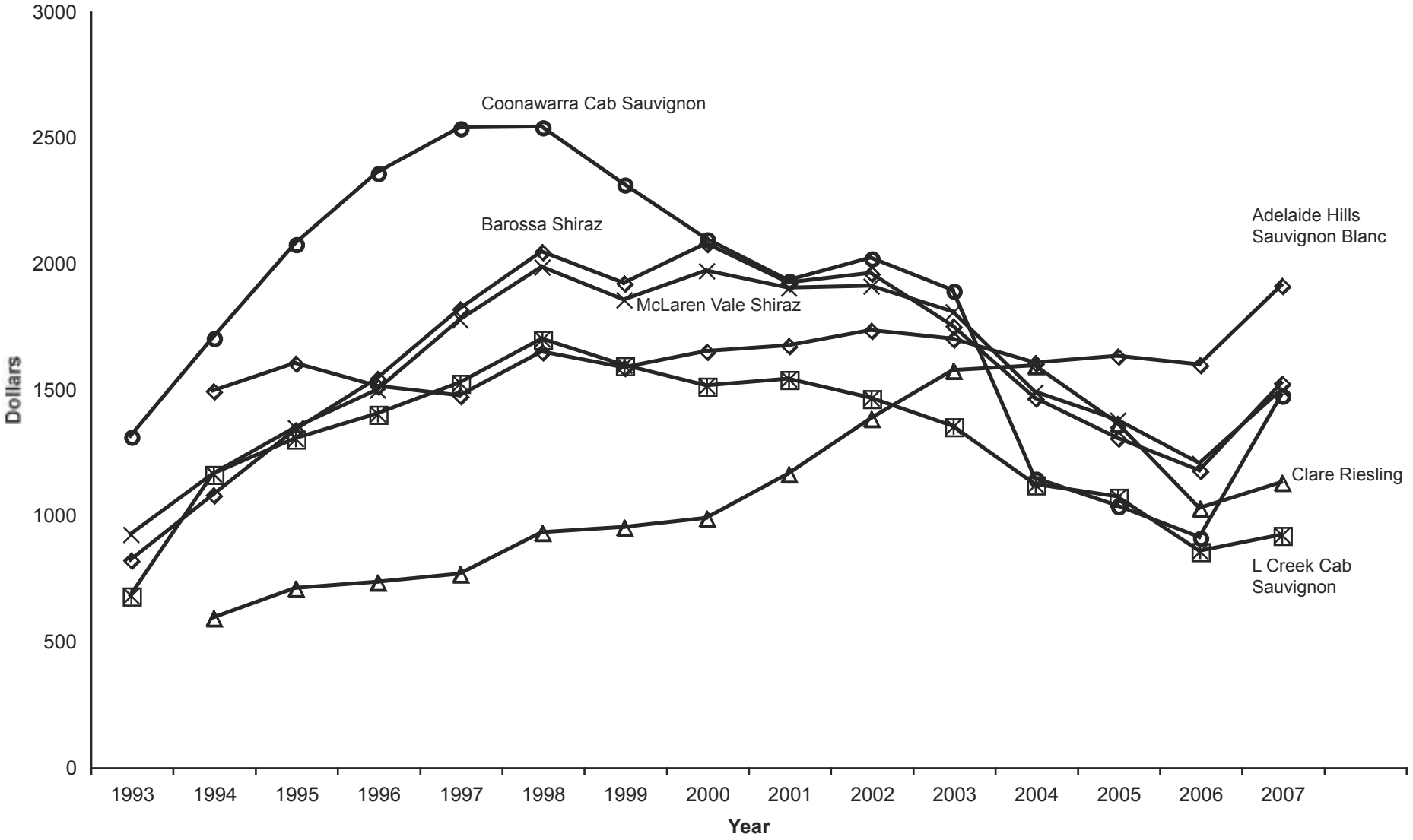
State summary

Total crush by GI region 2007

GI region	Winery grown (tonnes)	Purchased (tonnes)	Total crushed 2007 (tonnes)	*% of state crush*	Total crushed 2006 (tonnes)	*% difference 2007 vs 2006*
Adelaide Hills	4842	20950	25792	*4%*	24786	*4%*
Adelaide Plains	513	4451	4964	*1%*	4880	*2%*
Barossa Valley	7230	32477	39707	*7%*	77764	*-49%*
Barossa zone - other	0	24	24	*0%*	1886	*-99%*
Bordertown	2680	6123	8802	*2%*	18490	*-52%*
Clare Valley	6988	10270	17258	*3%*	35351	*-51%*
Coonawarra	10871	6155	17026	*3%*	32493	*-48%*
Currency Creek	1646	4837	6483	*1%*	10696	*-39%*
Eden Valley	3949	4657	8607	*1%*	12703	*-32%*
Fleurieu zone - other	131	1930	2061	*0%*	2546	*-19%*
Kangaroo Island	89	36	125	*0%*	238	*-48%*
Langhorne Creek	10464	29929	40393	*7%*	68218	*-41%*
Limestone Coast zone - other	1633	1431	3064	*1%*	10285	*-70%*
Lower Murray zone - other	0	1786	1786	*0%*	2086	*-14%*
McLaren Vale	11517	23776	35293	*6%*	63258	*-44%*
Mount Benson	1085	1473	2559	*0%*	2650	*-3%*
Mount Lofty Ranges zone - othe	48	764	812	*0%*	1555	*-48%*
Padthaway	14253	9535	23787	*4%*	45188	*-47%*
Riverland	34774	288397	323171	*56%*	464368	*-30%*
Robe	269	113	382	*0%*	** inc in LSC-other*	
Southern Fleurieu	210	1273	1483	*0%*	1159	*28%*
Southern Flinders Ranges	0	1277	1277	*0%*	856	*49%*
The Peninsulas	39	119	158	*0%*	187	*-15%*
Wrattonbully	4349	5747	10096	*2%*	22379	*-55%*
Total all regions	**117580**	**457531**	**575111**	***100%***	**904022**	***-36%***

State summary

Selected historical WAPs by region



State summary

Vintage summary by region 2007

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Adelaide Hills	Red	1,245	9,006	10,251	$14,450,691	$16,439,739
	White	3,597	11,944	15,541	$19,115,274	$25,179,477
	All	4,842	20,950	25,792	$33,565,966	$41,619,216
Adelaide Plains	Red	259	2,519	2,778	$2,066,070	$2,288,292
	White	254	1,932	2,186	$1,642,314	$1,826,555
	All	513	4,451	4,964	$3,708,384	$4,114,847
Barossa Valley	Red	4,811	21,586	26,397	$28,612,193	$34,982,455
	White	2,418	10,915	13,334	$8,310,705	$10,182,180
	All	7,230	32,501	39,731	$36,922,898	$45,164,635
Clare Valley	Red	3,865	5,259	9,124	$6,659,075	$11,397,728
	White	3,122	5,011	8,133	$5,562,704	$9,003,304
	All	6,988	10,270	17,258	$12,221,779	$20,401,033
Coonawarra	Red	8,881	5,495	14,376	$7,409,149	$19,181,153
	White	1,990	660	2,650	$661,138	$2,425,035
	All	10,871	6,155	17,026	$8,070,287	$21,606,188
Currency Creek	Red	1,194	3,875	5,069	$3,991,371	$5,188,746
** Inc in Fleurieu zone – other in 2006*	White	453	962	1,414	$994,311	$1,490,244
	All	1,646	4,837	6,483	$4,985,682	$6,678,991
Eden Valley	Red	1,411	2,051	3,462	$2,890,573	$4,749,603
	White	2,539	2,606	5,145	$3,105,343	$6,172,811
	All	3,949	4,657	8,607	$5,995,916	$10,922,414
Fleurieu zone - other	Red	225	2,007	2,231	$2,231,008	$2,482,586
	White	205	1,233	1,438	$1,498,336	$1,765,572
	All	429	3,240	3,669	$3,729,344	$4,248,158

State summary

Vintage summary by region 2007

Region	Colour	Total Winery Grown	Total purchased	Total crushed	Estimated value of purchased grapes	Estimated value of total crush
Langhorne Creek	Red	7,952	23,291	31,243	$24,130,851	$32,290,650
	White	2,512	6,638	9,150	$6,202,115	$8,618,686
	All	**10,464**	**29,929**	**40,393**	**$30,332,965**	**$40,909,336**
Limestone Coast zone - other	Red	4,262	8,020	12,282	$7,250,935	$11,352,926
	White	1,405	1,121	2,526	$1,225,702	$2,602,503
	All	**5,667**	**9,140**	**14,807**	**$8,476,637**	**$13,955,429**
McLaren Vale	Red	8,806	17,668	26,474	$24,492,121	$36,617,572
	White	2,711	6,108	8,819	$6,187,130	$9,051,485
	All	**11,517**	**23,776**	**35,293**	**$30,679,251**	**$45,669,057**
Padthaway	Red	7,531	5,466	12,998	$5,950,437	$14,138,227
	White	6,721	4,069	10,790	$3,795,478	$10,082,515
	All	**14,253**	**9,535**	**23,787**	**$9,745,915**	**$24,220,742**
Riverland	Red	15,797	138,144	153,941	$53,706,836	$59,711,262
	White	18,977	150,253	169,229	$57,093,423	$64,726,069
	All	**34,774**	**288,397**	**323,171**	**$110,800,259**	**$124,437,332**
SA - other	Red	77	2,968	3,045	$2,372,626	$2,437,526
	White	10	979	989	$408,842	$413,131
	All	**87**	**3,947**	**4,034**	**$2,781,468**	**$2,850,658**
Wrattonbully	Red	3,911	5,000	8,911	$6,601,360	$11,758,259
	White	438	747	1,185	$943,395	$1,487,823
	All	**4,349**	**5,747**	**10,096**	**$7,544,755**	**$13,246,081**
All regions		**117,580**	**457,531**	**575,111**	**$309,561,505**	**$420,044,116**

State summary

Current plantings in SA by variety and year planted

Variety	Current area in hectares by year planted					
	Pre-2004	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*
White winegrapes						
Albarino	2	1	0	7	9	*73%*
Biancone	21	0	0	0	21	*0%*
Chardonnay	10154	897	289	98	11437	*1%*
Chenin Blanc	227	0	0	2	229	*1%*
Colombard	964	13	11	10	997	*1%*
Crouchen	28	0	0	0	28	*0%*
Cygne Blanc	22	0	0	4	26	*17%*
Doradillo	140	0	0	0	140	*0%*
Marsanne	26	0	0	4	30	*14%*
Muscadelle (Tokay)	49	2	0	0	50	*0%*
Muscat Blanc (Frontignac)	132	5	8	27	172	*15%*
Muscat Gordo Blanco	1058	18	55	83	1214	*7%*
Other white	45	2	4	5	56	*9%*
Palomino	64	0	0	0	64	*0%*
Pedro Ximenes	43	0	0	0	43	*0%*
Pinot Gris	154	86	88	98	426	*23%*
Riesling	3126	145	67	29	3367	*1%*
Roussanne	11	2	2	2	17	*13%*
Sauvignon Blanc	1452	214	197	180	2043	*9%*
Semillon	1678	18	8	5	1710	*0%*
Sultana	399	0	2	1	402	*0%*
Sylvaner	42	0	0	0	42	*0%*
Traminer	261	1	4	0	266	*0%*
Trebbiano	35	0	0	0	35	*0%*
Verdelho	283	9	4	5	301	*2%*
Viognier	386	49	96	32	563	*6%*
Total white winegrapes	**20800**	**1461**	**835**	**592**	**23689**	***3%***

State summary

Current plantings in SA by variety and year planted

	Current area in hectares by year planted					
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*
Red winegrapes						
Barbera	21	1	1	0	22	*0%*
Cabernet Franc	201	0	0	1	202	*0%*
Cabernet Sauvignon	17003	79	5	44	17132	*0%*
Grenache	1827	5	21	3	1856	*0%*
Malbec	256	4	1	1	261	*0%*
Mataro (Mourvedre)	644	8	7	9	667	*1%*
Merlot	4443	45	36	30	4553	*1%*
Meunier (Pinot Meunier)	54	0	0	0	54	*0%*
Nebbiolo	88	0	1	0	89	*0%*
Other red	189	13	36	6	245	*3%*
Petit Verdot	907	2	1	1	911	*0%*
Pinot Noir	1383	14	22	21	1440	*1%*
Ruby Cabernet	379	0	4	0	383	*0%*
Sangiovese	212	5	4	0	221	*0%*
Shiraz	23196	539	301	149	24185	*1%*
Tempranillo	134	8	4	3	149	*2%*
Zinfandel	36	4	2	5	47	*10%*
Total red winegrapes	**50972**	**728**	**444**	**273**	**52416**	***1%***
Other varieties						
Multipurpose - red	96	5	11	0	112	
Multipurpose - white	44	0	0	0	44	
Tablegrapes - red	43	0	0	0	43	
Tablegrapes - white	22	0	0	0	22	
Rootstock block	37	3	12	0	52	
Total all varieties	**72013**	**2197**	**1302**	**866**	**76378**	***1%***

State summary

Current plantings in SA by GI region and year planted

		Current area in hectares by year planted						
Zone	**Region**	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*% of state plantings*
Mount Lofty Ranges	Adelaide Hills	3433	166	130	119	3848	*3%*	*5%*
	Adelaide Plains	550	8	0	14	573	*2%*	*1%*
	Clare Valley	5532	147	20	44	5742	*1%*	*8%*
	Mount Lofty Ranges Zone - Other	270	7	1	0	279	*0%*	*0%*
	Total for Mount Lofty Ranges zone	9786	328	151	177	10442	*2%*	*14%*
Barossa	Barossa Valley	9650	304	247	50	10250	*0%*	*13%*
	Eden Valley	2248	38	26	16	2328	*1%*	*3%*
	Barossa Zone - Other	105	0	0	0	105	*0%*	*0%*
	Total for Barossa zone	12003	342	273	66	12684	*1%*	*17%*
Fleurieu	Currency Creek	792	77	15	24	908	*3%*	*1%*
	Kangaroo Island	111	2	0	0	113	*0%*	*0%*
	Langhorne Creek	5839	177	114	66	6195	*1%*	*8%*
	Mclaren Vale	6870	119	62	77	7128	*1%*	*9%*
	Southern Fleurieu	393	7	1	16	417	*4%*	*1%*
	Fleurieu Zone - Other	153	66	0	0	219	*0%*	*0%*
	Total for Fleurieu zone	14157	449	192	182	14979	*1%*	*20%*
Limestone Coast	Bordertown	1233	24	11	6	1273	*0%*	*2%*
	Coonawarra	5735	111	8	8	5862	*0%*	*8%*
	Mount Benson	505	14	3	7	529	*1%*	*1%*
	Padthaway	3802	132	60	19	4013	*0%*	*5%*
	Robe	688	5	21	36	750	*5%*	*1%*
	Wrattonbully	2475	35	27	16	2553	*1%*	*3%*
	Limestone Coast Zone - Other	638	22	46	0	705	*0%*	*1%*
	Total for Limestone Coast zone	15076	342	176	92	15686	*1%*	*21%*
Lower Murray	Riverland	20361	702	509	344	21916	*2%*	*29%*
	Lower Murray Zone - Other	443	20	1	5	469	*1%*	*1%*
	Total for Lower Murray zone	20804	722	511	349	22386	*2%*	*29%*
The Peninsulas		30	5	0	0	35	*0%*	*0%*
Far North		159	8	0	0	167	*0%*	*0%*
Whole state	**Total for All GIs**	**72013**	**2197**	**1302**	**866**	**76378**	***1%***	***100%***

State summary

Number of growers by region and property size 2007

	Property size in hectares											
	< 10 ha		*10 - 24 ha*		*25 - 49 ha*		*50 - 99 ha*		*100+ ha*		***Total***	
GI region	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*	*# of growers*	*Area (ha)*
Mount Lofty Ranges												
Adelaide Hills	197	765	63	1068	31	1050	10	627	3	357	304	3869
Adelaide Plains	16	62	8	115	3	114	2	128	1	149	30	567
Clare Valley	166	689	62	989	20	659	12	828	10	2574	270	5739
Mount Lofty Ranges Zone - Other	19	61	2	28	3	97	1	97			25	284
Barossa												
Barossa Valley	330	1409	157	2517	78	2592	19	1201	9	2531	593	10250
Eden Valley	84	374	27	398	11	370	7	537	2	650	131	2328
Barossa Zone - Other	3	8	1	14			1	83			5	105
Fleurieu												
Currency Creek	10	57	8	121	4	145	1	50	2	537	25	910
Kangaroo Island	16	91	2	22							18	113
Langhorne Creek	20	102	24	391	27	956	18	1347	13	3400	102	6195
McLaren Vale	327	1407	92	1497	41	1367	22	1454	6	1378	488	7103
Southern Fleurieu	30	91	7	85	5	170	1	68			43	415
Fleurieu Zone - Other	8	24	4	63	1	39	1	93			14	219
Limestone Coast												
Bordertown					1	43			5	1230	6	1273
Coonawarra	51	272	35	534	17	567	16	1074	12	3415	131	5862
Mount Benson	5	39	4	63	6	204	2	105	1	119	18	529
Padthaway	3	17	5	69	7	248	5	329	11	3350	31	4013
Robe	2	16	5	73	4	149	1	81	1	242	13	561
Wrattonbully	11	60	22	380	12	442	4	288	6	1383	55	2553
Limestone Coast Zone - Other	24	103	6	92	3	83	2	103	4	512	39	894
Lower Murray												
Riverland	757	3855	352	5346	93	3184	29	1992	32	7542	1263	21919
Lower Murray Zone - Other	15	68	8	124	9	281					32	473
Far North	10	43	5	92	1	32					16	167
The Peninsulas	4	14	2	21							6	35
Grand Total	**2108**	**9628**	**901**	**14103**	**377**	**12793**	**154**	**10485**	**118**	**29368**	**3658**	**76378**

State summary

Supply and demand for grapes in South Australia 2008 - 2012

Variety	Year	Est Supply [1]	Winery grown grapes [2]	Contract purchases [2]	Total committed intake	Uncontracted fruit [3]	Total requirement (Demand)	Net surplus/ shortfall [4]
Chardonnay	2008	142,384	34,413	132,327	166,740	-24,356	152,190	-9,805
	2009	172,151	35,882	122,705	158,587	13,563	157,820	14,331
	2010	195,604	36,111	114,530	150,641	44,963	170,751	24,853
	2011	197,048	37,829	99,909	137,737	59,311	173,088	23,960
	2012	197,270	37,849	96,660	134,509	62,760	176,203	21,067
Pinot Gris	2008	2,106	1,410	1,950	3,359	-1,253	8,464	-6,358
	2009	3,427	1,606	4,069	5,675	-2,248	10,988	-7,561
	2010	4,696	2,260	4,932	7,192	-2,496	11,600	-6,903
	2011	4,876	2,905	5,214	8,119	-3,243	12,436	-7,561
	2012	4,882	3,000	5,211	8,211	-3,330	13,032	-8,150
Riesling	2008	23,072	13,027	15,627	28,655	-5,583	23,426	-354
	2009	30,073	13,359	15,306	28,665	1,408	23,562	6,510
	2010	36,401	13,393	14,790	28,184	8,217	23,920	12,481
	2011	36,554	13,605	13,290	26,895	9,659	23,181	13,372
	2012	36,631	13,656	12,687	26,343	10,288	23,339	13,292
Sauvignon Blanc	2008	17,184	7,784	14,141	21,925	-4,741	30,619	-13,434
	2009	21,075	8,281	16,892	25,173	-4,098	33,484	-12,408
	2010	25,396	8,555	17,746	26,301	-905	35,801	-10,405
	2011	26,343	9,189	16,823	26,012	331	37,465	-11,122
	2012	26,371	9,304	16,428	25,732	639	38,612	-12,242
Semillon	2008	20,826	7,762	13,716	21,478	-652	25,888	-5,062
	2009	23,231	7,903	13,467	21,370	1,861	25,988	-2,758
	2010	26,933	7,989	13,332	21,321	5,612	28,259	-1,326
	2011	27,156	8,104	12,782	20,886	6,270	30,647	-3,491
	2012	27,258	8,110	12,383	20,493	6,766	31,029	-3,770
All other white varieties	2008	77,439	9,796	76,532	86,329	-8,889	88,274	-10,834
	2009	89,117	11,214	72,522	83,736	5,381	93,531	-4,414
	2010	109,125	12,123	71,367	83,490	25,635	96,572	12,553
	2011	110,802	12,922	64,642	77,564	33,238	95,712	15,090
	2012	110,854	12,972	62,717	75,690	35,165	95,778	15,076
Total white winegrapes	**2008**	**283,011**	**74,193**	**254,293**	**328,485**	**-45,474**	**328,860**	**-45,848**
	2009	**339,073**	**78,245**	**244,961**	**323,207**	**15,867**	**345,373**	**-6,299**
	2010	**398,156**	**80,432**	**236,697**	**317,129**	**81,027**	**366,903**	**31,253**
	2011	**402,778**	**84,553**	**212,660**	**297,213**	**105,565**	**372,529**	**30,249**
	2012	**403,266**	**84,892**	**206,086**	**290,978**	**112,287**	**377,993**	**25,273**

[1] Supply forecast derived from planting details recorded on PGIB vineyard register

[2] A raising factor of 1.027 has been applied to these figures to allow for non-respondents

[3] A negative number indicates supply forecast is below wineries' estimated commitment

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

State summary

Supply and demand for grapes in South Australia 2008 - 2012

Variety	Year	Est Supply [1]	Winery grown grapes [2]	Contract purchases [2]	Total committed intake	Uncontracted fruit [3]	Total requirement (Demand)	Net surplus/ shortfall [4]
Cabernet Sauvignon	2008	124,025	49,566	98,852	148,418	-24,393	160,700	-36,675
	2009	155,177	50,417	90,370	140,787	14,389	168,421	-13,245
	2010	186,045	50,201	81,366	131,567	54,478	178,877	7,168
	2011	186,851	50,734	70,460	121,194	65,657	178,710	8,141
	2012	187,219	50,908	66,937	117,845	69,374	181,595	5,624
Grenache	2008	14,807	4,038	11,829	15,867	-1,059	19,212	-4,405
	2009	16,879	4,273	11,313	15,586	1,293	19,917	-3,038
	2010	25,399	4,427	11,061	15,489	9,911	20,286	5,114
	2011	25,645	4,567	10,539	15,106	10,539	20,545	5,100
	2012	25,718	4,622	9,711	14,334	11,384	20,631	5,087
Merlot	2008	40,844	17,916	34,044	51,960	-11,115	51,555	-10,711
	2009	47,051	18,403	30,271	48,674	-1,624	51,550	-4,499
	2010	55,983	18,679	28,129	46,808	9,175	52,736	3,247
	2011	56,256	19,039	24,393	43,432	12,823	52,475	3,780
	2012	56,341	19,105	23,333	42,438	13,903	53,175	3,167
Shiraz	2008	184,917	55,206	169,065	224,271	-39,354	230,105	-45,188
	2009	232,389	57,527	155,835	213,362	19,027	241,102	-8,713
	2010	286,145	58,250	146,616	204,866	81,279	253,914	32,231
	2011	288,887	59,016	129,479	188,495	100,392	254,159	34,728
	2012	289,574	59,268	124,767	184,036	105,539	260,489	29,085
All other red varieties	2008	40,775	13,546	32,766	46,312	-5,537	47,663	-6,889
	2009	47,823	13,740	29,234	42,974	4,849	48,401	-578
	2010	68,209	13,855	27,407	41,262	26,947	48,177	20,031
	2011	68,558	14,034	24,794	38,828	29,730	47,938	20,620
	2012	68,629	14,063	24,393	38,456	30,173	49,156	19,473
Total red winegrapes	**2008**	**405,369**	**140,272**	**346,555**	**486,827**	**-81,458**	**509,235**	**-103,867**
	2009	**499,318**	**144,360**	**317,023**	**461,384**	**37,935**	**529,391**	**-30,073**
	2010	**621,782**	**145,412**	**294,580**	**439,991**	**181,790**	**553,991**	**67,791**
	2011	**626,197**	**147,390**	**259,665**	**407,055**	**219,142**	**553,828**	**72,369**
	2012	**627,481**	**147,967**	**249,142**	**397,109**	**230,372**	**565,046**	**62,435**
Total all winegrapes	**2008**	**688,380**	**214,465**	**600,847**	**815,312**	**-126,932**	**838,095**	**-149,715**
	2009	**838,392**	**222,606**	**561,985**	**784,590**	**53,802**	**874,764**	**-36,372**
	2010	**1,019,937**	**225,843**	**531,276**	**757,120**	**262,817**	**920,894**	**99,044**
	2011	**1,028,975**	**231,943**	**472,326**	**704,269**	**324,706**	**926,357**	**102,618**
	2012	**1,030,746**	**232,859**	**455,228**	**688,087**	**342,659**	**943,039**	**87,707**

[1] Supply forecast derived from planting details recorded on PGIB vineyard register

[2] A raising factor of 1.027 has been applied to these figures to allow for non-respondents

[3] A negative number indicates supply forecast is below wineries' estimated commitment

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

State summary

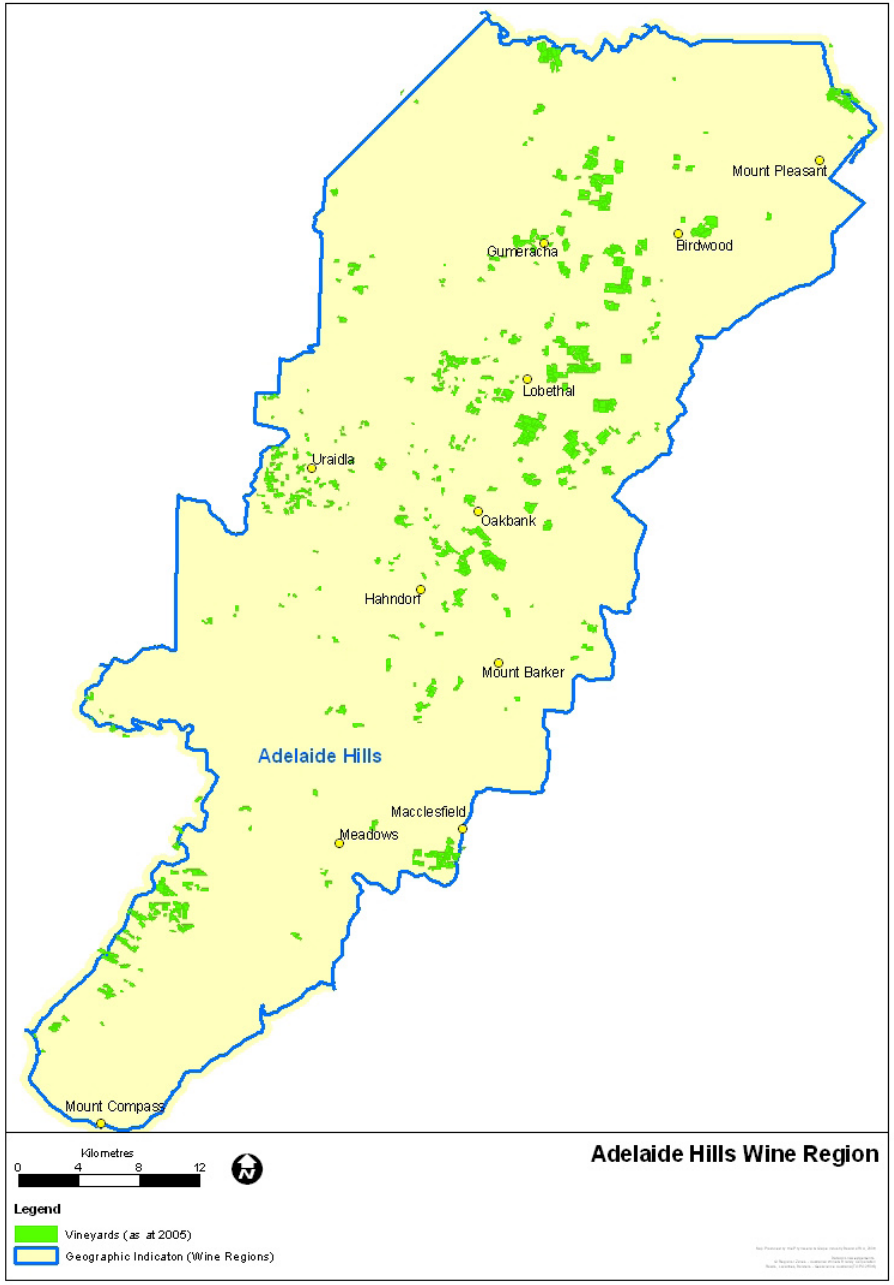
Estimated supply and fruit availability 2008 - 2012
Cool climate (regions outside the Riverland)

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	1,335	741	809	-215	1,717	746	801	171	1,735	658	668	409
Cabernet Sauvignon	83,814	43,117	49,835	-9,139	118,452	43,367	36,270	38,815	119,460	43,526	25,777	50,157
Grenache	9,523	3,546	5,520	458	12,172	3,921	5,494	2,757	12,490	4,119	5,070	3,301
Malbec	1,211	575	585	52	1,861	592	521	748	1,876	620	508	748
Mataro	2,025	659	1,259	107	2,685	707	1,223	755	2,730	743	1,193	794
Merlot	22,946	11,456	17,664	-6,174	30,593	12,075	14,589	3,930	30,870	12,241	12,463	6,167
Other Red	2,275	615	761	899	3,194	602	740	1,853	3,319	616	639	2,063
Petit Verdot	2,097	672	1,349	76	2,689	759	1,127	803	2,731	777	1,082	871
Pinot Noir	8,772	3,303	6,169	-700	10,869	3,284	4,826	2,759	10,954	3,472	4,195	3,288
Ruby Cabernet	111	70	0	41	111	54	0	57	111	54	0	57
Sangiovese	1,214	454	823	-63	1,677	454	579	644	1,708	465	266	977
Shiraz	119,964	43,719	81,533	-5,288	164,408	45,488	67,039	51,881	167,470	46,293	53,756	67,421
Tempranillo	742	245	419	78	959	244	424	291	977	245	432	300
Total red winegrapes	**256,029**	**109,172**	**166,725**	**-19,868**	**351,389**	**112,292**	**133,634**	**105,463**	**356,431**	**113,829**	**106,050**	**136,553**
White winegrapes												
Chardonnay	52,304	23,327	31,823	-2,845	72,995	23,980	24,858	24,157	74,189	25,135	20,909	28,145
Chenin Blanc	571	98	209	264	713	111	219	383	733	111	219	403
Colombard	115	230	104	-219	115	240	104	-229	115	240	104	-229
Muscat Gordo Blanco	30	0	57	-27	30	0	57	-27	30	0	33	-3
Other White	2,663	635	765	1,263	3,875	641	685	2,550	4,050	802	605	2,643
Pinot Gris	2,075	1,433	1,660	-1,018	4,326	2,231	4,482	-2,387	4,427	2,819	4,661	-3,052
Riesling	18,611	12,461	12,204	-6,055	30,774	12,833	11,367	6,573	30,952	12,935	9,409	8,608
Sauvignon Blanc	13,068	5,608	8,716	-1,256	18,367	6,234	8,623	3,510	18,903	6,559	7,797	4,548
Semillon	11,802	3,217	8,332	253	16,226	3,395	8,239	4,592	16,511	3,460	7,789	5,262
Traminer	946	674	547	-275	1,451	677	446	329	1,454	708	418	328
Verdelho	1,241	666	1,058	-483	2,041	640	1,043	358	2,117	640	720	757
Viognier	2,983	687	2,052	244	4,568	834	2,181	1,554	4,668	887	2,042	1,740
Total white winegrapes	**106,411**	**49,035**	**67,529**	**-10,153**	**155,480**	**51,815**	**62,303**	**41,362**	**158,152**	**54,294**	**54,708**	**49,150**
Total all winegrapes	**362,440**	**158,207**	**234,254**	**-30,020**	**506,869**	**164,107**	**195,937**	**146,825**	**514,583**	**168,123**	**160,758**	**185,703**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.044 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*



Adelaide Hills Wine Region

Regional summary report

2007

Adelaide Hills

Vintage overview

Vintage report

The 2006/2007 season will long be remembered by Adelaide Hills grape growers for the significant and repeated frost events that affected vineyards across the district. Many of the frost damaged blocks were not harvested in 2007 due to very low yields and variable ripening following the spring frosts. The very frosty start to the season was followed by one of the driest years on record. Rainfall levels were only 58% of the long term average for the period from May 2006 through to April 2007. Above average rainfall in January gave the only respite in a long dry growing season and helped to rejuvenate vineyards across the Hills after an extremely dry first half of the season. The rain in January was timed perfectly as most vineyards were just entering veraison, when the berries were still resilient enough not to split with the increased water input late in the growing season.

The 2007 vintage caught everyone slightly unawares with most blocks being harvested three to four weeks earlier than average. The early harvest in most cases was due to a combination of lower yields and the rapid degree day accumulation which reached 1141 by the end of February (a figure not seen until late March in previous years). Reports from winemakers have indicated some excellent quality from our flagship varieties Chardonnay and Sauvignon Blanc. Pinot Noir has also experienced an upsurge in interest with an increasing quantity being grown for dry red production last season.

Michael MacPherson
Adelaide Hills Vineyard Contractors

Overview of vintage statistics

The harvest from the Adelaide Hills was 25,792 tonnes in 2007, a few hundred tonnes above the 2006 harvest. This was the only major region where production increased, in a harvest that was down by 1/3 across the whole state. The total value of grapes from the Adelaide Hills increased by more than 20%, from $34 million to $42 million, which was only 10% below the estimated value of the Barossa Valley and McLaren Vale total crush. The average purchase value for Chardonnay and Cabernet Sauvignon both increased by around $200 per tonne, while Sauvignon Blanc increased by $300 and Pinot Noir by $400 per tonne. The average purchase value for Pinot Noir was the highest since 1998, which Sauvignon Blanc was considerably higher than in any previous year since the survey started.

New plantings in the Adelaide Hills in 2006 (including top-working and replacements) were 119 hectares (3% of the total area) – strongly driven by Sauvignon Blanc and Pinot Gris. This rate of growth, although not high, is much higher than the average across the state (1%).

The estimated production from the Adelaide Hills region for 2008 is 32,000 tonnes. 25,000 tonnes is already committed to the wineries, leaving around 7,000 tonnes uncontracted. Any uncontracted fruit is likely to be in demand, as shortfalls are predicted across the state, due to water restrictions and the after-effects of drought and frost in other regions (see State Summary section).

By 2012, the estimated production for the Adelaide Hills is 34,500 tonnes, of which 55% (19,000 tonnes) is already under contract or winery grown fruit. This proportion of already committed fruit is low compared with most other regions, and leaves around 16,000 tonnes likely to be made available on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to “normal”.

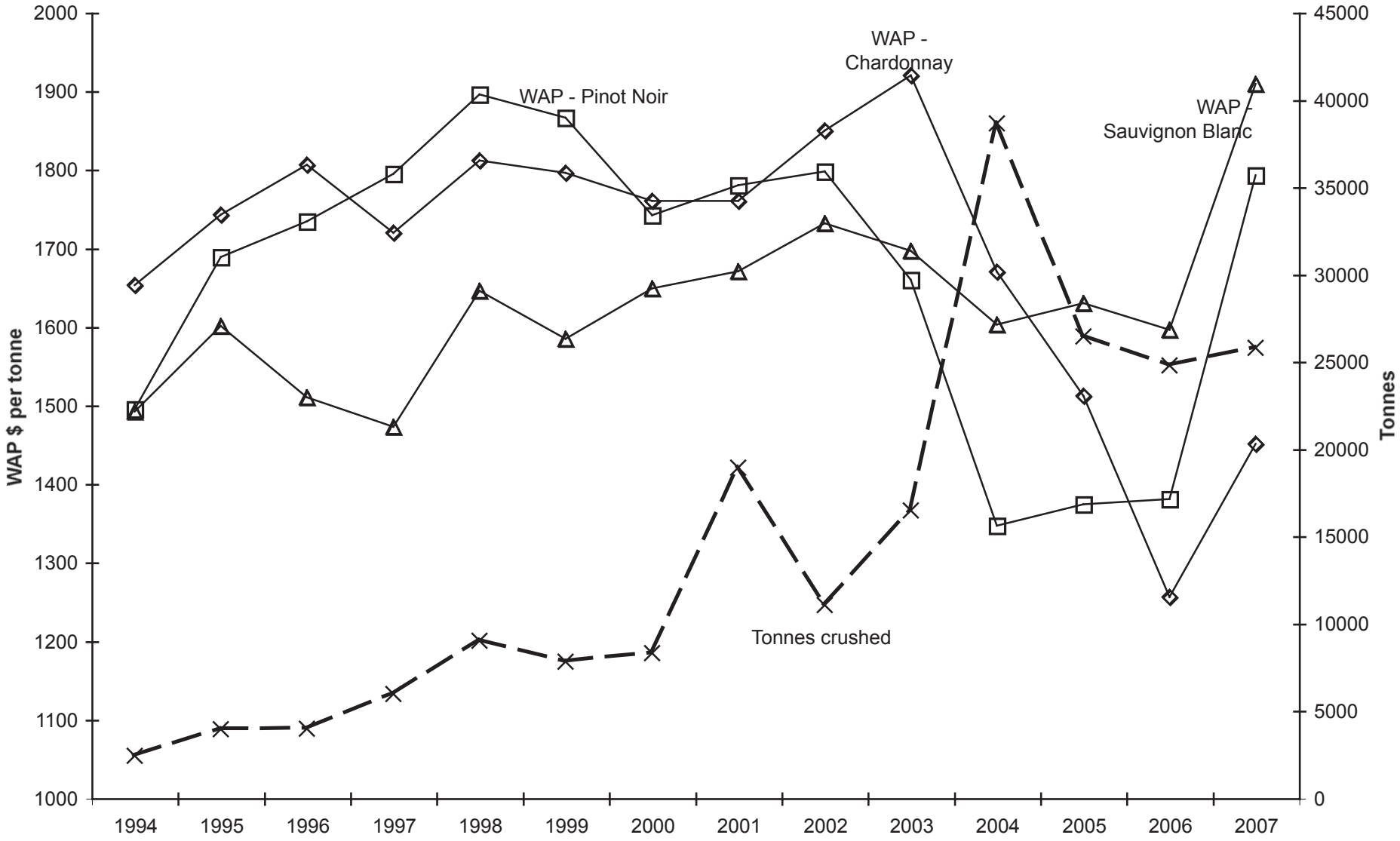
Adelaide Hills

Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	11			$6,606	$600	5	16	$9,666
Cabernet Sauvignon	940	$600	$2,255	$1,492,378	$1,587	206	1,146	$1,818,709
Grenache	16			$13,962	$854	0	16	$13,962
Malbec	1			$1,500	$1,500	0	1	$1,500
Mataro	7			$7,700	$1,100	0	7	$7,700
Merlot	2,251	$400	$2,255	$2,806,901	$1,247	177	2,428	$3,027,654
Other Red	279	$600	$1,900	$481,920	$1,725	28	308	$530,329
Petit Verdot	24			$54,852	$2,255	1	25	$57,108
Pinot Noir	4,245	$600	$3,184	$7,610,332	$1,793	330	4,575	$8,202,400
Sangiovese	52			$76,512	$1,479	7	59	$86,866
Shiraz	1,161	$600	$3,384	$1,857,332	$1,600	491	1,652	$2,643,148
Tempranillo	19	$1,650	$2,255	$40,696	$2,120	0	19	$40,696
Total red winegrapes	**9,006**			**$14,450,691**		**1,245**	**10,251**	**$16,439,739**
WHITE								
Chardonnay	5616	$500	$2,700	$8,151,485	$1,451	1,160	6776	$9,835,044
Other White	6			$7,194	$1,209	0	6	$7,194
Pinot Gris	724	$1,250	$3,000	$1,678,266	$2,317	299	1,023	$2,371,023
Riesling	591	$600	$1,600	$541,484	$916	226	817	$748,537
Sauvignon Blanc	3,564	$1,000	$3,050	$6,805,311	$1,909	1,632	5,196	$9,920,767
Semillon	816	$600	$1,800	$965,998	$1,184	150	967	$1,144,098
Traminer	131			$153,953	$1,176	43	174	$204,875
Verdelho	150	$1,200	$1,765	$270,322	$1,808	0	150	$270,322
Viognier	345	$900	$2,255	$541,260	$1,569	87	432	$677,617
Total white winegrapes	**11,944**			**$19,115,274**		**3,597**	**15,541**	**$25,179,477**
Total all winegrapes	**20,950**			**$33,565,966**		**4,842**	**25,792**	**$41,619,216**

Adelaide Hills

Historical WAP vs tonnes crushed



Adelaide Hills

Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Franc	6	0	0	0	6	*0%*	51	52	52	52	52
Cabernet Sauvignon	259	0	0	0	259	*0%*	2073	2073	2073	2073	2073
Grenache	3	0	0	0	3	*0%*	27	27	27	27	27
Merlot	292	0	0	2	294	*1%*	2341	2348	2361	2361	2361
Meunier (Pinot Meunier)	33	0	0	0	33	*0%*	267	267	267	267	267
Nebbiolo	6	0	0	0	6	*0%*	48	48	48	48	48
Other red	13	0	0	0	13	*1%*	105	106	108	108	108
Petit Verdot	5	0	0	0	5	*0%*	36	36	36	36	36
Pinot Noir	541	3	2	10	556	*2%*	4897	4953	5058	5058	5058
Sangiovese	9	0	0	0	9	*0%*	69	69	69	69	69
Shiraz	301	2	5	1	310	*0%*	2443	2463	2484	2484	2484
Tempranillo	11	0	0	0	11	*0%*	90	90	90	90	90
Total red winegrapes	**1480**	**5**	**7**	**14**	**1505**	***1%***	**12446**	**12532**	**12674**	**12674**	**12674**
White winegrapes					0						
Arneis	1	0	1	3	4	*61%*	12	24	48	48	48
Chardonnay	924	56	32	2	1013	*0%*	8858	9053	9130	9130	9130
Other white	2	0	0	1	3	*30%*	20	25	35	35	35
Pinot Gris	100	14	21	35	171	*21%*	1225	1493	1922	1922	1922
Riesling	107	1	2	0	109	*0%*	971	976	979	979	979
Sauvignon Blanc	611	88	62	61	823	*7%*	6414	7015	7733	7733	7733
Semillon	93	0	4	0	97	*0%*	952	964	972	972	972
Traminer	21	0	0	0	21	*0%*	207	207	207	207	207
Verdelho	26	0	0	0	26	*0%*	205	205	205	205	205
Viognier	66	2	1	3	73	*5%*	545	565	597	597	597
Total white winegrapes	**1950**	**161**	**123**	**105**	**2339**	***4%***	**19408**	**20527**	**21828**	**21828**	**21828**
Rootstock block	3	0	0	0	3	*0%*					
Total all varieties	**3432**	**166**	**130**	**119**	**3847**	***3%***	**31854**	**33059**	**34501**	**34501**	**34501**

Adelaide Hills

Estimated supply and committed intake 2008 - 2011

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	51	8	0	43	52	8	0	44	52	8	0	44
Cabernet Sauvignon	2,073	279	759	1,035	2,073	365	258	1,451	2,073	375	66	1,633
Grenache	27	0	0	27	27	0	0	27	27	0	0	27
Malbec	4	0	5	-1	4	0	5	-1	4	0	5	-1
Merlot	2,341	166	1,359	816	2,361	151	820	1,391	2,361	151	642	1,569
Other Red	410	26	232	151	413	28	229	156	413	28	229	156
Petit Verdot	36	1	24	11	36	1	0	35	36	1	0	35
Pinot Noir	4,897	473	3,669	755	5,058	449	2,746	1,863	5,058	454	2,476	2,129
Sangiovese	69	10	41	18	69	10	0	59	69	10	0	59
Shiraz	2,443	664	944	835	2,484	730	472	1,282	2,484	735	311	1,438
Tempranillo	90	0	29	61	90	0	5	85	90	0	5	85
Total red winegrapes	**12,452**	**1,626**	**7,064**	**3,761**	**12,678**	**1,741**	**4,535**	**6,402**	**12,678**	**1,761**	**3,734**	**7,183**
White winegrapes												
Chardonnay	8,858	1,845	5,392	1,620	9,130	1,985	3,446	3,698	9,130	2,947	3,080	3,104
Other White	32	0	6	26	83	0	6	77	83	0	6	77
Pinot Gris	1,225	650	568	7	1,922	718	590	615	1,922	736	472	714
Riesling	971	250	423	299	979	255	134	591	979	260	65	654
Sauvignon Blanc	6,414	1,914	3,922	578	7,733	2,015	3,408	2,310	7,733	2,045	3,023	2,665
Semillon	952	193	535	224	972	193	347	432	972	193	305	474
Traminer	207	52	168	-13	207	54	0	153	207	54	0	153
Verdelho	205	0	91	114	205	0	40	165	205	0	0	205
Viognier	545	98	375	71	597	98	223	277	597	98	160	339
Total white winegrapes	**19,408**	**5,001**	**11,480**	**2,928**	**21,829**	**5,317**	**8,193**	**8,319**	**21,829**	**6,332**	**7,110**	**8,387**
Total all winegrapes	**31,860**	**6,627**	**18,543**	**6,689**	**34,508**	**7,058**	**12,728**	**14,721**	**34,508**	**8,093**	**10,844**	**15,570**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.01 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

Adelaide Plains Wine Region

Regional summary report

2007

Adelaide Plains

Vintage overview

Vintage report

The season started with the vines losing their leaves in response to very cold frosty days in June 2006. Winter-spring rainfall was well below average with no October rain and only just over four inches recorded in the June – November period. Many growers began earlier irrigation prior to bud burst with both underground water and back-up secondary treated water as a means to top up the soil profile. These irrigations made a major difference to Adelaide Plains shoot growth and final yields, compared with regions where irrigation water is not as readily available.

The 2006-07 growing season started one week earlier than average with bursting Chardonnay in the third week of August. Generally shoot growth was average, with mild to warm spring days. There was one isolated very hot day (39° C) in October. Flowering started soon after this with Chardonnay and finished by the end of the month with Cabernet Sauvignon. This early finish to flowering was a potential sign of an early harvest.

Unlike the previous November when the Gawler River broke its banks and there was major flooding, the only significant rain was on the 12th when 20mm fell. This was followed by dry, warm-hot weather and there was no mildew seen.

Similar to the previous months, December recorded only just above 20mm and most of this fell on one day in the 3rd week. The last week saw a four-day heat wave which pushed ripeness even faster than normal. January was milder and the early Sauvignon Blanc blocks were flavour ripe by the end of third week. The most significant rain event of the season occurred at this time, with 30mm falling on one day. More rain fell in other regions where significant berry split occurred, but on the Adelaide Plains very little was seen due to the higher soil moisture contents.

February saw no rain but two significant heat waves. Berry maturity was hard to track during these events but Shiraz was flavour ripe by the second week of the month. By early March the vintage was nearly over.

The white quality seemed to be less affected by the short growing season and there was good varietal flavour. However, red berry colour was lower than average but overall red quality stood up very well, probably due to the full healthy canopies.

Robin Nettelbeck
S Smith & Son

Overview of vintage statistics

The harvest from the Adelaide Plains was 4,964 tonnes in 2007, slightly above the 2006 harvest, but still well below the 2005 harvest of 7,000 tonnes. The total value of grapes from the Adelaide Plains increased by 10% to just over $4 million in 2007 - again well below the 2005 figure. The average purchase value for most varieties was slightly higher than in 2006, with Shiraz up by nearly $200 per tonne (30%).

There were 14 hectares of new plantings recorded in the Adelaide Plains region in the 2006 planting season – almost all of which were Pinot Gris. As the total area has not increased, this indicates that the new plantings were replacements or top-worked over existing varieties.

The estimated production from the Adelaide Plains vineyards for 2008 is 5,000 tonnes, almost all (4,800 tonnes) of which is already committed to the wineries, leaving very little available on the spot market. By 2012, the estimated production is expected to grow to 7,000 tonnes. 5,000 tonnes is already under contract or winery grown fruit. This leaves around 2,000 tonnes likely to be made available on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to “normal”.

Adelaide Plains — Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Sauvignon	262	$650	$4,368	$263,831	$1,005	43	305	$306,744
Grenache	343	$450	$1,000	$207,969	$607	6	349	$211,860
Mataro	56			$50,382	$899	0	56	$50,382
Merlot	319	$650	$1,500	$282,972	$886	47	366	$324,348
Other Red	213			$140,795	$660	4	218	$143,606
Petit Verdot	14			$10,816	$801	0	14	$10,816
Pinot Noir	234			$211,707	$904	0	234	$211,707
Ruby Cabernet	3			$2,028	$600	0	3	$2,028
Sangiovese	11			$9,136	$801	50	61	$49,142
Shiraz	1,063	$500	$1,622	$886,434	$834	109	1,172	$977,658
Total red winegrapes	2,519			$2,066,070		259	2,778	$2,288,292
WHITE								
Chardonnay	920	$550	$950	$700,656	$761	31	951	$724,030
Chenin Blanc	67			$54,896	$819	0	67	$54,896
Colombard	42			$29,081	$700	197	239	$167,260
Muscat Gordo Blanco	19			$9,500	$500	0	19	$9,500
Riesling	69			$41,340	$600	5	74	$44,340
Sauvignon Blanc	582	$700	$1,400	$552,842	$949	21	603	$572,529
Semillon	65			$51,680	$800	0	65	$51,680
Viognier	169			$202,320	$1,200	0	169	$202,320
Total white winegrapes	**1,932**			**$1,642,314**		**254**	**2,186**	**$1,826,555**
Total all winegrapes	**4,451**			**$3,708,384**		**513**	**4,964**	**$4,114,847**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Adelaide Plains — Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Alicante Bouschet	2	0	0	0	2	*0%*	25	25	25	25	25
Cabernet Franc	3	0	0	0	3	*0%*	36	36	36	36	36
Cabernet Sauvignon	59	0	0	0	59	*0%*	823	823	823	823	823
Grenache	29	0	0	0	29	*0%*	404	404	404	404	404
Malbec	6	0	0	0	6	*0%*	89	89	89	89	89
Mataro (Mourvedre)	4	0	0	0	4	*0%*	49	49	49	49	49
Merlot	41	0	0	0	41	*0%*	579	579	579	579	579
Petit Verdot	2	0	0	0	2	*0%*	32	32	32	32	32
Pinot Noir	14	0	0	0	14	*0%*	196	196	196	196	196
Ruby Cabernet	8	0	0	0	8	*0%*	105	105	105	105	105
Sangiovese	6	0	0	0	6	*0%*	81	81	81	81	81
Shiraz	180	0	0	0	180	*0%*	2521	2521	2521	2521	2521
Tempranillo	0	0	0	2	2	*100%*	0	9	31	31	31
Zinfandel	2	0	0	0	2	*0%*	22	22	22	22	22
Total red winegrapes	**354**	**0**	**0**	**2**	**356**	***1%***	**4962**	**4970**	**4993**	**4993**	**4993**
White winegrapes											
Chardonnay	85	1	0	0	86	*0%*	1029	1032	1032	1032	1032
Chenin Blanc	5	0	0	0	5	*0%*	62	62	62	62	62
Colombard	10	0	0	0	10	*0%*	115	115	115	115	115
Muscat Blanc (Frontignac)	1	0	0	0	1	*0%*	12	12	12	12	12
Muscat Gordo Blanco	3	0	0	0	3	*0%*	30	30	30	30	30
Pinot Gris	0	0	0	12	12	*100%*	0	44	161	161	161
Riesling	17	0	0	0	17	*0%*	207	207	207	207	207
Sauvignon Blanc	49	7	0	0	56	*0%*	653	669	669	669	669
Semillon	9	0	0	0	9	*0%*	107	107	107	107	107
Verdelho	1	0	0	0	1	*0%*	17	17	17	17	17
Viognier	16	0	0	0	16	*0%*	196	196	196	196	196
Total white winegrapes	**196**	**8**	**0**	**12**	**216**	***6%***	**2428**	**2491**	**2608**	**2608**	**2608**
Total all varieties	**550**	**8**	**0**	**14**	**573**	***2%***	**7390**	**7461**	**7601**	**7601**	**7601**

Adelaide Plains

Estimated supply and committed intake 2008 - 2012

	2008				2010				2012			
Variety	Est Supply [1]	Winery grown grapes [2]	Contract purchases [2]	Un-contracted fruit [3]	Est Supply [1]	Winery grown grapes [2]	Contract purchases [2]	Un-contracted fruit [3]	Est Supply [1]	Winery grown grapes [2]	Contract purchases [2]	Un-contracted fruit [3]
Red winegrapes												
Cabernet Sauvignon	823	59	155	610	823	59	155	610	823	59	155	610
Grenache	404	8	72	323	404	9	2	393	404	9	2	393
Mataro	49	0	40	9	49	0	40	9	49	0	40	9
Merlot	579	20	354	205	579	20	354	205	579	20	354	205
Other Red	47	5	0	42	47	7	0	40	47	8	0	39
Pinot Noir	196	0	262	-66	196	0	262	-66	196	0	262	-66
Ruby Cabernet	105	0	0	105	105	0	0	105	105	0	0	105
Sangiovese	81	35	0	45	81	35	0	45	81	40	0	40
Shiraz	2,521	95	1,083	1,342	2,521	95	982	1,444	2,521	100	982	1,438
Total red winegrapes	**4,962**	**223**	**1,967**	**2,772**	**4,993**	**226**	**1,795**	**2,973**	**4,993**	**237**	**1,795**	**2,961**
White winegrapes												
Chardonnay	1,029	36	998	-5	1,032	36	953	43	1,032	36	953	43
Chenin Blanc	62	0	0	62	62	0	0	62	62	0	0	62
Colombard	115	223	81	-188	115	223	81	-188	115	223	81	-188
Muscat Gordo Blanco	30	0	30	0	30	0	30	0	30	0	30	0
Pinot Gris	0	0	101	-101	161	0	303	-143	161	0	303	-143
Riesling	207	28	80	99	207	28	43	135	207	28	43	135
Sauvignon Blanc	653	20	804	-172	669	20	814	-166	669	20	814	-166
Semillon	107	0	51	56	107	0	51	56	107	0	51	56
Viognier	196	0	202	-6	196	0	202	-6	196	0	202	-6
Total white winegrapes	**2,428**	**308**	**2,348**	**-227**	**2,608**	**308**	**2,478**	**-178**	**2,608**	**308**	**2,478**	**-178**
Total all winegrapes	**7,390**	**530**	**4,315**	**2,545**	**7,601**	**533**	**4,273**	**2,795**	**7,601**	**544**	**4,273**	**2,784**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.01 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

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Barossa Valley Wine Region

Incorporating Barossa Zone - other

Regional summary report

2007

Barossa Valley

Vintage overview

Vintage overview

The 2006-2007 season was dominated by the very low rainfall. Precipitation for the growing season 2006-2007 halved the average of previous growing seasons, with zero rainfall recorded in the months of October and February. Spring rainfall was 38mm (36% of average).

Due to significantly below average minimum temperatures and low soil temperatures in conjunction with clear skies, an inversion frost occurred in late October, which damaged inflorescences in varieties in the lower-lying regions of the valley floor, with estimated crop losses in excess of 50% to 80%. It was anticipated that the crop loads across the floor would be 30% below average due to lighter bunches resulting from drought conditions. Above average minimum (approximately 1°C above) and maximum temperatures (ranging from 1 to 3°C above the mean) along with very low humidity, promoted premature flowering and veraison - approximately three weeks earlier than the 'norm'.

Harvest on the floor was the earliest recorded, with some varieties being picked mid- to late- January due to accelerated ripening as a result of small, low weight bunches. All Barossa red varieties were down substantially in yield due to smaller berry size and some split grapes resulting from a 30mm rainfall event occurring after veraison. White varieties were also low yielding due to drought impact and tired vine canopies.

In summary the 2006 2007 growing season could be described as extreme in terms of climate averages for all parameters including rainfall, temperature and relative humidity and as a result it was very tough for vines to sustain optimal function.

Robin Nettelbeck
Phylloxera and Grape Industry Board

Overview of vintage statistics

The harvest from the Barossa Valley was 39,731 tonnes in 2007, 50% below the 2006 harvest and the lowest crop for the region since 2000. The total value of grapes from the region decreased from $76 million to $45 million; however the lower tonnages meant a general increase in most average prices, with Cabernet Sauvignon up by around $250 per tonne, and Shiraz by $350 per tonne.

New plantings in the Barossa in 2006 (including top-working and replacements) amounted to only 50 hectares (compared with 247 hectares the previous spring). While this is a very small amount, there is no indication of any significant removal of grapevines being undertaken in the region.

The estimated production from the Barossa Valley for 2008 is 67,000 tonnes. This is well below its potential, as a result of the residual effects of the drought and ongoing lack of water. The wineries' committed intake is 70,000 tonnes – ie higher than the estimated supply, so there is not expected to be any surplus fruit. By 2012, the estimated production for the Barossa Valley is 96,000 tonnes, of which 66% (62,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 34,000 tonnes to be sold on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

NB The Barossa Valley regional summary includes the Barossa zone – other (105 hectares).

Barossa Valley

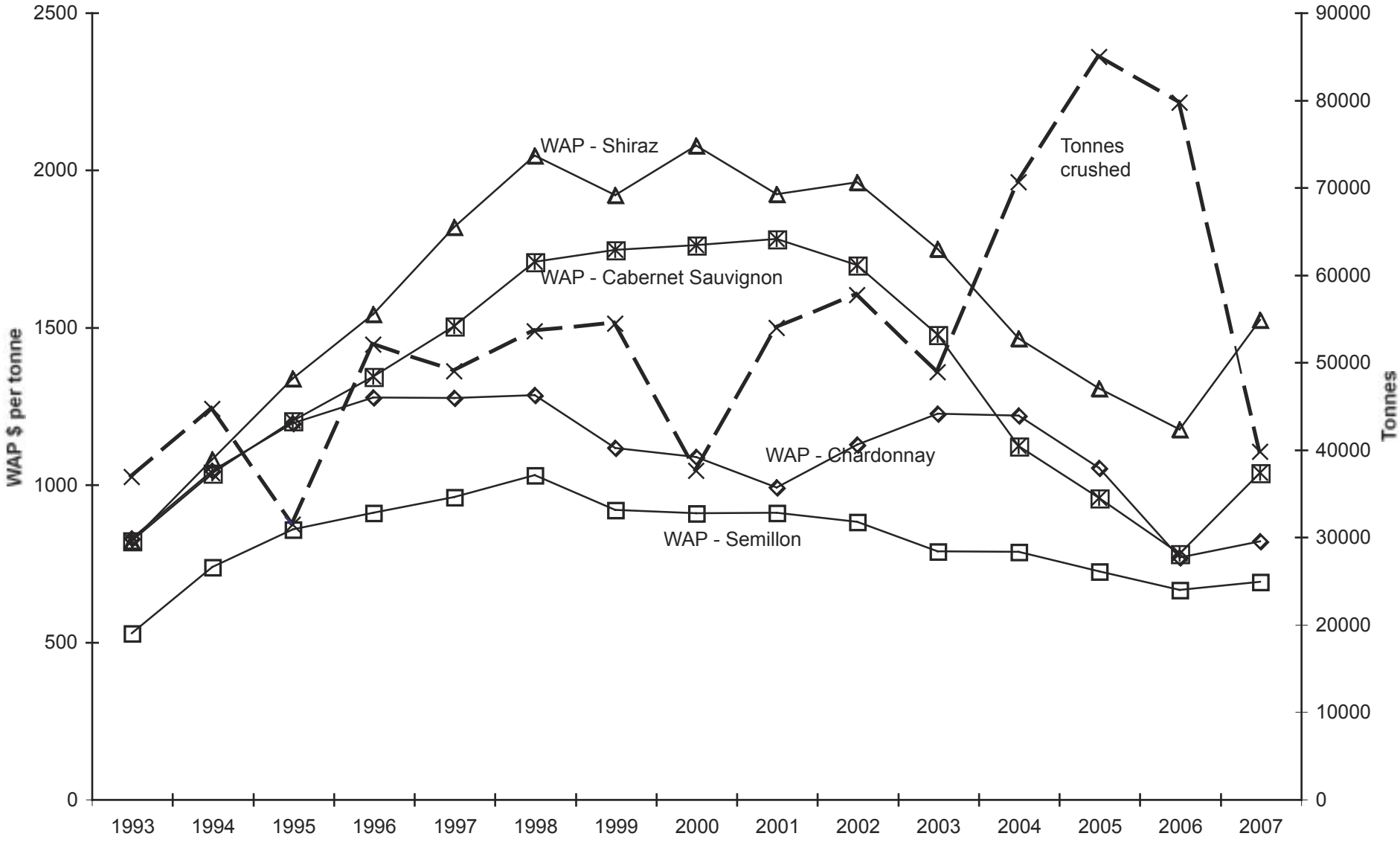
Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	46	$800	$1,200	$52,688	$1,153	17	63	$72,426
Cabernet Sauvignon	3,901	$300	$5,730	$4,046,227	$1,037	972	4,873	$5,054,764
Grenache	2,200	$400	$8,000	$2,572,810	$1,170	530	2,730	$3,193,186
Malbec	39	$590	$1,200	$32,875	$834	9	48	$40,118
Mataro	438	$600	$8,000	$637,740	$1,456	227	665	$968,498
Merlot	1,828	$500	$1,800	$1,595,061	$873	299	2,126	$1,855,930
Other Red	100	$700	$2,200	$111,209	$1,117	61	161	$179,819
Petit Verdot	70	$867	$1,200	$65,664	$932	20	91	$84,566
Pinot Noir	261	$500	$1,350	$213,466	$816	46	308	$251,292
Sangiovese	105	$800	$1,400	$126,057	$1,198	7	113	$134,946
Shiraz	12,505	$300	$10,000	$19,030,079	$1,522	2,616	15,121	$23,011,757
Tempranillo	93	$850	$2,000	$128,318	$1,381	5	98	$135,153
Total red winegrapes	**21,586**			**$28,612,193**		**4,811**	**26,397**	**$34,982,455**
WHITE								
Chardonnay	2,964	$325	$1,300	$2,426,126	$818	759	3,723	$3,047,241
Chenin Blanc	161			$90,058	$558	6	167	$93,406
Other White	323	$250	$1,700	$209,765	$649	221	545	$353,223
Pinot Gris	46			$29,080	$635	0	46	$29,080
Riesling	1,933	$400	$1,800	$1,442,135	$746	799	2,732	$2,038,171
Sauvignon Blanc	579	$500	$1,400	$583,210	$1,006	133	712	$716,944
Semillon	4,654	$200	$1,818	$3,209,609	$690	457	5,111	$3,524,498
Traminer	10			$9,126	$900	0	10	$9,126
Verdelho	33			$28,305	$850	0	33	$28,305
Viognier	210	$700	$2,250	$283,291	$1,348	44	254	$342,187
Total white winegrapes	**10,915**			**$8,310,705**		**2,418**	**13,334**	**$10,182,180**
Total all winegrapes	**32,501**			**$36,922,898**		**7,230**	**39,731**	**$45,164,635**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Barossa Valley

Historical WAP vs tonnes crushed



Barossa Valley

Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Franc	37	0	0	1	38	*2%*	224	262	304	307	310
Cabernet Sauvignon	1389	0	2	1	1391	*0%*	8333	9730	11129	11240	11352
Grenache	688	2	19	2	710	*0%*	4133	4919	5677	5734	5791
Malbec	17	3	0	0	20	*0%*	116	142	162	164	165
Mataro (Mourvedre)	171	7	5	4	187	*2%*	1056	1273	1488	1503	1518
Merlot	377	25	8	0	409	*0%*	2364	2847	3272	3304	3338
Nebbiolo	8	0	0	0	8	*0%*	50	58	66	67	68
Other red	55	6	11	2	74	*2%*	355	481	585	591	597
Petit Verdot	29	2	1	0	32	*0%*	182	220	253	256	258
Pinot Noir	61	0	0	0	61	*0%*	365	425	486	491	496
Sangiovese	17	2	0	0	20	*0%*	113	137	156	158	159
Shiraz	4864	153	105	24	5145	*0%*	29824	35628	41103	41514	41929
Tempranillo	37	0	3	1	41	*2%*	221	271	322	325	328
Total red winegrapes	**7749**	**200**	**153**	**34**	**8136**	***0%***	**47336**	**56392**	**65004**	**65654**	**66310**
White winegrapes											
Chardonnay	628	52	16	0	697	*0%*	6644	8297	9751	9849	9947
Chenin Blanc	33	0	0	0	34	*0%*	300	335	403	407	411
Muscadelle (Tokay)	29	2	0	0	30	*0%*	266	301	361	364	368
Muscat Blanc (Frontignac)	46	0	0	0	46	*1%*	412	458	552	558	563
Other white	74	1	2	3	80	*4%*	673	764	948	957	967
Pinot Gris	0	0	1	3	4	*75%*	0	6	34	34	35
Riesling	373	25	50	2	449	*0%*	3515	4327	5386	5439	5494
Sauvignon Blanc	93	8	6	3	109	*3%*	883	1044	1299	1312	1325
Semillon	685	8	0	1	695	*0%*	6911	8326	9722	9820	9918
Viognier	44	9	19	4	76	*5%*	450	661	895	904	913
Total white winegrapes	**2005**	**104**	**94**	**16**	**2219**	***1%***	**67391**	**80910**	**94354**	**95298**	**96251**
Total all varieties	**9754**	**304**	**247**	**50**	**10354**	***0%***	**67391**	**80910**	**94354**	**95298**	**96251**

Barossa Valley

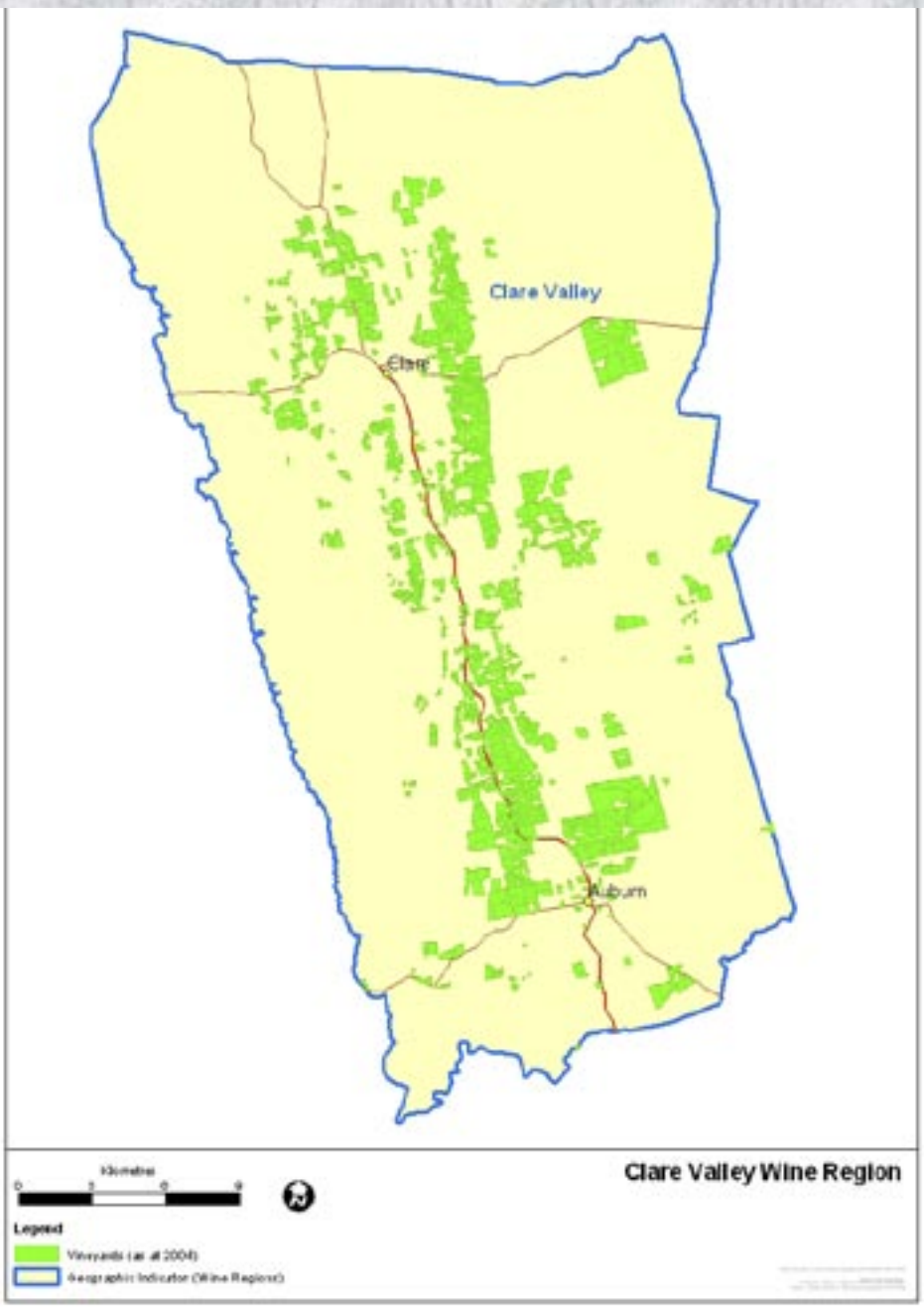
Estimated supply and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	224	63	133	28	304	63	133	107	310	53	94	162
Cabernet Sauvignon	8,333	2,557	6,837	-1,061	11,129	2,559	5,759	2,810	11,352	2,558	5,377	3,417
Grenache	4,133	942	3,216	-26	5,677	1,046	3,431	1,200	5,791	1,104	3,339	1,349
Malbec	116	29	71	15	162	30	71	60	165	30	57	78
Mataro	1,056	382	383	292	1,488	427	347	715	1,518	462	322	734
Merlot	2,364	657	3,606	-1,900	3,272	654	3,520	-902	3,338	649	3,543	-854
Other Red	405	110	110	185	652	124	60	468	665	132	52	481
Petit Verdot	182	45	58	79	253	43	58	153	258	43	58	158
Pinot Noir	365	73	295	-3	486	73	231	182	496	73	231	192
Sangiovese	113	17	126	-30	156	17	107	32	159	17	107	36
Shiraz	29,824	6,977	25,439	-2,593	41,103	7,309	19,915	13,880	41,929	7,595	18,755	15,579
Tempranillo	221	22	244	-45	322	22	255	45	328	22	263	43
Total red winegrapes	**47,336**	**11,876**	**40,518**	**-5,058**	**65,004**	**12,367**	**33,886**	**18,750**	**66,310**	**12,738**	**32,196**	**21,375**
White winegrapes												
Chardonnay	6,644	1,385	4,566	693	9,751	1,484	3,411	4,856	9,947	1,532	3,129	5,287
Chenin Blanc	300	7	210	83	403	7	220	175	411	7	220	183
Muscat Gordo Blanco	0	0	2	-2	0	0	2	-2	0	0	2	-2
Other White	1,351	366	513	473	1,860	371	444	1,045	1,898	376	418	1,103
Pinot Gris	0	0	115	-115	34	10	173	-150	35	10	173	-149
Riesling	3,515	1,124	2,648	-257	5,386	1,189	2,412	1,785	5,494	1,189	1,931	2,374
Sauvignon Blanc	883	325	1,020	-461	1,299	325	1,219	-245	1,325	325	1,157	-157
Semillon	6,911	841	5,595	476	9,722	847	5,740	3,135	9,918	852	5,550	3,516
Traminer	0	0	28	-28	0	0	28	-28	0	0	0	0
Verdelho	0	0	61	-61	0	0	61	-61	0	0	61	-61
Viognier	450	72	460	-82	895	82	549	264	913	90	526	297
Total white winegrapes	**20,055**	**4,120**	**15,218**	**718**	**29,351**	**4,316**	**14,261**	**10,774**	**29,941**	**4,382**	**13,167**	**12,392**
Total all winegrapes	**67,391**	**15,995**	**55,736**	**-4,340**	**94,354**	**16,683**	**48,147**	**29,524**	**96,251**	**17,120**	**45,364**	**33,767**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.01 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*



Clare Valley Wine Region

Regional summary report

2007

Clare Valley

Vintage overview

Vintage report

The 2007 vintage was a memorable one for the Clare Valley. Seasonal influences played a dramatic part in the 2006-2007 grape-growing season, which was one of the warmest and driest on record, with parts of the region also being affected by frost.

Despite the fact that 2007 was a warm year, the growing season was consistently warm rather than hot. There were very few 40 degree plus days this season, which allowed for the development of full, fresh flavours while also maintaining the natural acid structures.

The growing season was very dry, with Clare receiving roughly half of its average rainfall. There was a significant rainfall event in mid-January, with parts of Clare receiving over 100mm. For many vineyards this significant rainfall gave all vines a 'much needed drink' and was important to maintaining canopies to allow for full flavour and structural development in the grapes. While some sites experienced splitting, there were no reports of botrytis from these vineyards.

Wide variations in yield were experienced for the 2007 vintage. The combined effects of drought, frost and cool windy conditions during flowering heavily influenced yields across the region. The number of berries per bunch, berry weights and bunch numbers per vine were all down and in a number of cases resulted in extraordinarily low yields. Riesling appeared to be the variety that showed the least yield variation, with most growers recording yields 20% below average. Cabernet Sauvignon and Shiraz showed significantly greater variation, with crops between 50% and 70% down. Despite the early start, logistics in the winery were relatively easy due to the low yields. The challenge however was in reliable yield prediction.

Clare Valley Winemakers' Inc.

Overview of vintage statistics

The harvest from the Clare Valley was 17,258 tonnes in 2006, less than 50% of the 2006 harvest. The total value of grapes from the region dropped by 46% to $20 million, with the average purchase value for most of the major varieties increasing, due to shortfalls in supply (Cabernet Sauvignon by more than $200 per tonne).

There were 44 hectares of new plantings in the Clare Valley in spring 2006 (including top-working and replacements) - compared with 20 hectares in 2005. Riesling accounted for half of the total. There is no indication of any significant removal of grapevines being undertaken in the region.

The estimated production from the Clare Valley for 2008 is 21,000 tonnes (taking into account the ongoing effects of drought and water restrictions, and recovery from frost). The wineries' committed intake is 35,000 tonnes – ie higher than the estimated supply, so there is not expected to be any surplus fruit. By 2012, the estimated production is 43,000 tonnes, of which 75% (32,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 11,000 tonnes to be sold on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Clare Valley

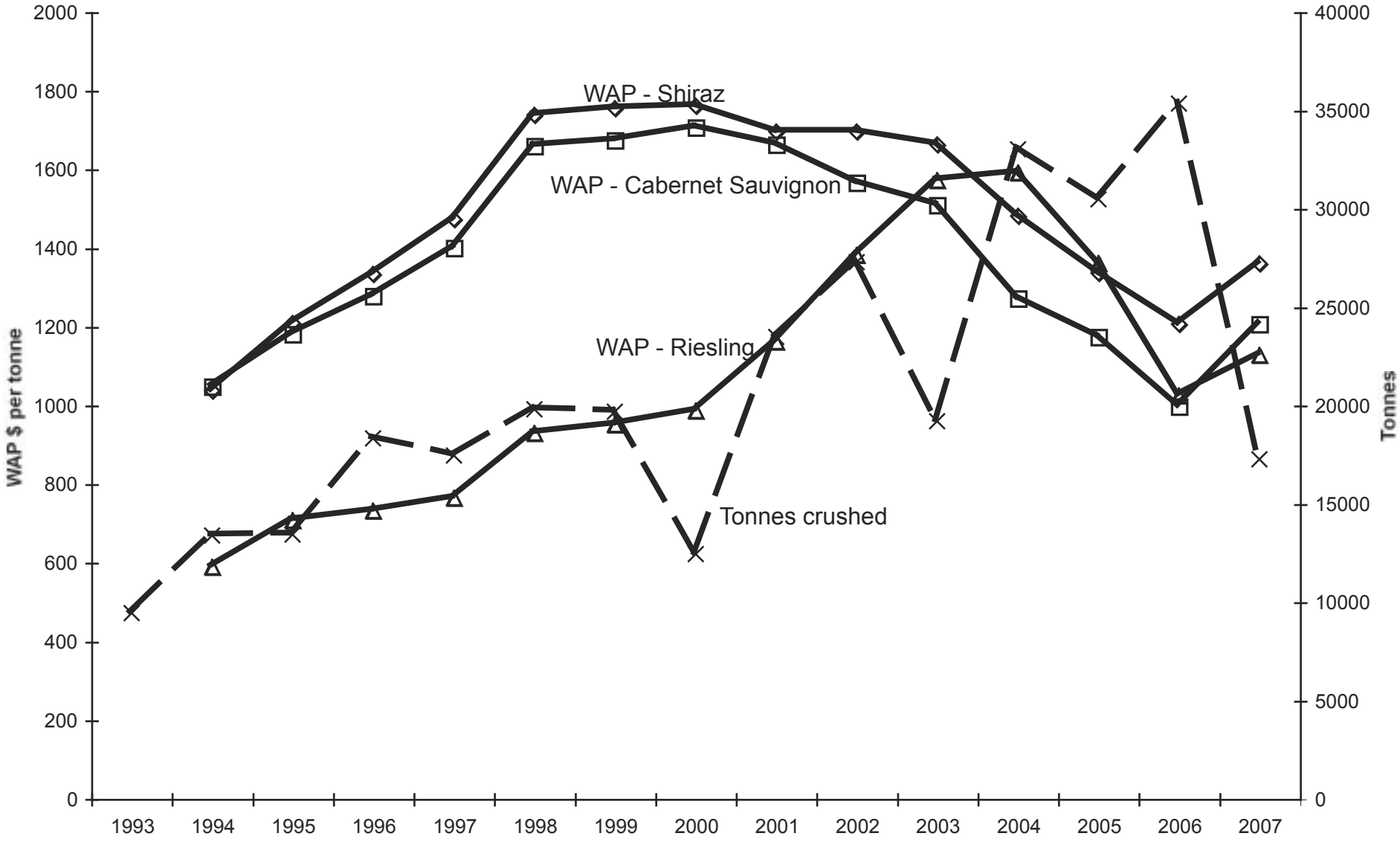
Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	5			$3,304	$703	27	31	$21,975
Cabernet Sauvignon	1,208	$500	$2,725	$1,457,584	$1,207	1,420	2,628	$3,171,484
Grenache	72	$1,000	$1,600	$80,975	$1,118	52	124	$138,771
Malbec	44	$750	$2,000	$46,089	$1,040	87	131	$136,601
Mataro	9			$8,955	$984	22	31	$30,132
Merlot	779	$400	$1,630	$838,227	$1,076	460	1,239	$1,333,591
Other Red	7			$7,284	$1,071	54	61	$65,181
Petit Verdot	38			$27,968	$731	33	71	$52,186
Pinot Noir	12			$8,316	$700	44	56	$39,046
Ruby Cabernet	0					8	8	$10,130
Sangiovese	57			$54,622	$959	107	164	$156,826
Shiraz	3,007	$500	$3,000	$4,092,787	$1,361	1,535	4,542	$6,182,930
Tempranillo	21			$32,964	$1,557	17	38	$58,874
Total red winegrapes	**5,259**			**$6,659,075**		**3,865**	**9,124**	**$11,397,728**
WHITE								
Chardonnay	590	$500	$1,652	$574,855	$974	504	1,094	$1,065,769
Chenin Blanc	0					7	7	$7,771
Other White	0					35	35	$38,853
Pinot Gris	19			$26,012	$1,398	6	25	$34,403
Riesling	3,705	$600	$2,700	$4,179,022	$1,128	2,047	5,752	$6,488,634
Sauvignon Blanc	43	$850	$1,500	$54,043	$1,266	109	152	$192,265
Semillon	580	$400	$1,500	$623,436	$1,074	323	903	$970,133
Traminer	24			$24,480	$1,000	71	95	$95,030
Verdelho	0			$0	$0	7	7	$7,771
Viognier	50	$1,500	$1,800	$80,857	$1,616	14	64	$102,675
Total white winegrapes	**5,011**			**$5,562,704**		**3,122**	**8,133**	**$9,003,304**
Total all winegrapes	**10,270**			**$12,221,779**		**6,988**	**17,258**	**$20,401,033**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Clare Valley

Historical WAP vs tonnes crushed



Clare Valley

Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Franc	20	0	0	0	20	*0%*	70	100	140	140	140
Cabernet Sauvignon	1268	5	0	13	1286	*1%*	3815	6399	7709	7709	7709
Grenache	65	0	0	0	65	*0%*	228	326	456	456	456
Malbec	74	1	0	0	75	*0%*	262	376	527	527	527
Mataro (Mourvedre)	31	0	0	0	31	*0%*	108	155	218	218	218
Merlot	307	0	0	2	309	*1%*	1075	1540	2166	2166	2166
Other red	18	0	0	0	19	*1%*	66	95	133	133	133
Petit Verdot	21	0	0	0	21	*0%*	74	106	148	148	148
Pinot Noir	12	0	0	0	12	*0%*	42	60	84	84	84
Sangiovese	34	0	0	0	34	*0%*	121	172	241	241	241
Shiraz	1868	40	7	4	1919	*0%*	6649	9574	13437	13437	13437
Tempranillo	14	4	0	0	19	*0%*	61	94	132	132	132
Total red winegrapes	**3734**	**51**	**7**	**19**	**3811**	***0%***		**18998**	**25393**	**25393**	**25393**
White winegrapes					0						
Chardonnay	361	17	2	0	380	*0%*	1684	2658	3423	3423	3423
Other white	19	0	0	1	20	*4%*	86	136	180	180	180
Pinot Gris	7	10	2	2	21	*12%*	65	132	189	189	189
Riesling	1151	61	6	21	1239	*2%*	5385	8588	11141	11141	11141
Sauvignon Blanc	30	1	1	1	32	*2%*	139	221	291	291	291
Semillon	188	0	0	0	188	*0%*	847	1318	1695	1695	1695
Traminer	22	0	0	0	22	*0%*	101	157	202	202	202
Viognier	16	6	2	0	24	*0%*	86	167	196	196	196
Total white winegrapes	**1794**	**96**	**13**	**25**	**1927**	***1%***		**13378**	**17317**	**17317**	**17317**
Total all varieties	**5528**	**147**	**20**	**44**	**5739**	***1%***	**20964**	**32376**	**42709**	**42709**	**42709**

Clare Valley

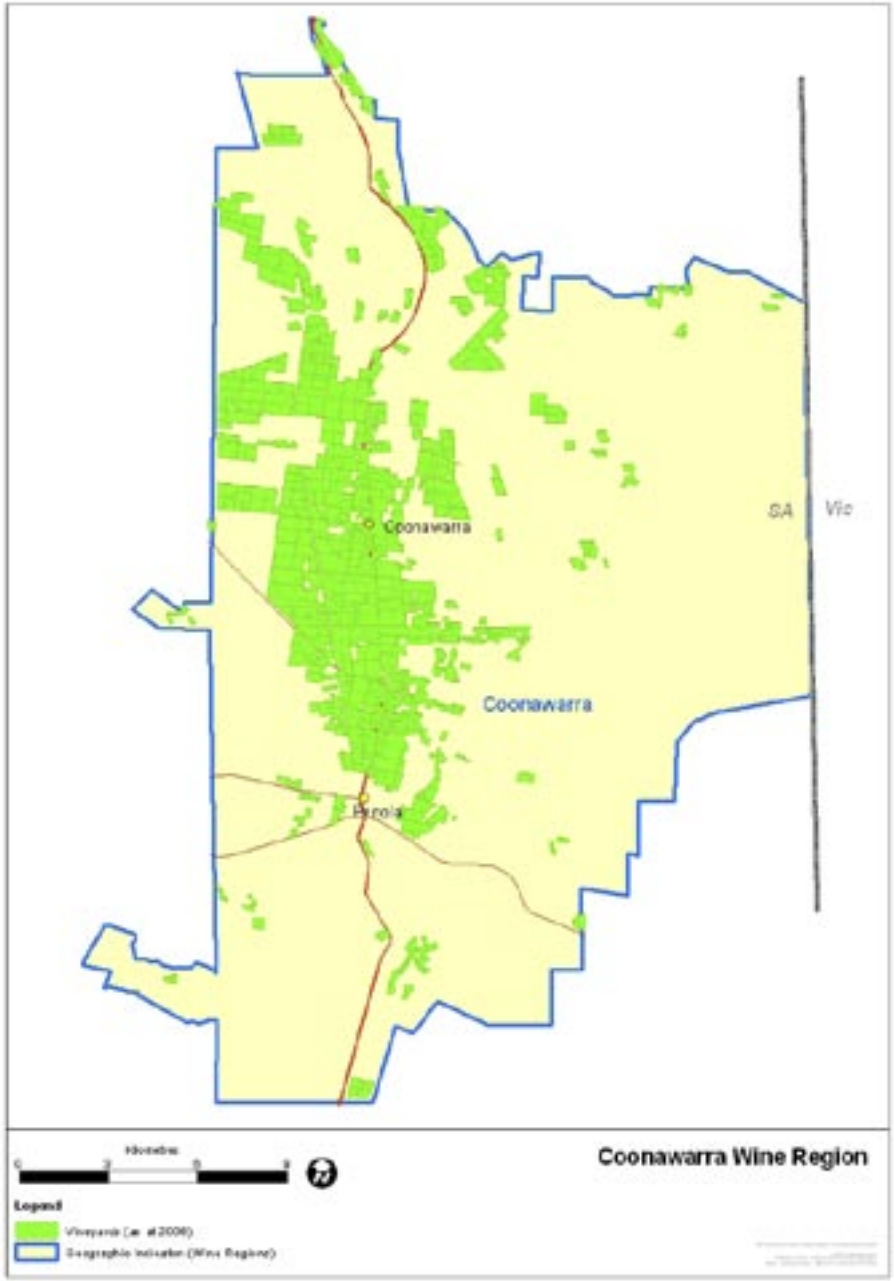
Estimated supply and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	70	94	8	-32	140	94	8	38	140	96	8	37
Cabernet Sauvignon	3,815	3,782	3,184	-3,150	7,709	3,672	2,199	1,838	7,709	3,911	1,194	2,605
Grenache	228	105	144	-21	456	109	100	248	456	109	100	248
Malbec	262	310	74	-122	527	318	52	157	527	318	53	156
Mataro	108	49	22	38	218	52	22	144	218	52	22	144
Merlot	1,075	1,016	1,447	-1,388	2,166	1,073	984	108	2,166	1,095	837	234
Other Red	66	85	5	-24	133	87	5	41	133	87	5	41
Petit Verdot	74	62	109	-96	148	62	0	86	148	62	0	86
Pinot Noir	42	76	0	-34	84	76	0	9	84	76	0	9
Ruby Cabernet	0	13	0	-13	0	13	0	-13	0	13	0	-13
Sangiovese	121	113	11	-3	241	118	16	107	241	124	16	101
Shiraz	6,649	4,120	7,525	-4,996	13,437	4,247	5,687	3,503	13,437	4,584	3,339	5,514
Tempranillo	61	31	33	-3	132	31	65	36	132	31	65	36
Total red winegrapes	**12,571**	**9,856**	**12,560**	**-9,845**	**25,393**	**9,953**	**9,139**	**6,301**	**25,393**	**10,556**	**5,639**	**9,198**
White winegrapes												
Chardonnay	1,684	1,560	637	-513	3,423	1,709	466	1,249	3,423	1,714	262	1,448
Chenin Blanc	0	13	0	-13	0	13	0	-13	0	13	0	-13
Other White	86	77	0	9	180	77	4	98	180	77	22	81
Pinot Gris	65	22	38	5	189	71	123	-4	189	98	143	-52
Riesling	5,385	3,265	5,321	-3,200	11,141	3,423	5,086	2,632	11,141	3,499	3,935	3,707
Sauvignon Blanc	139	175	43	-79	291	204	46	41	291	220	56	14
Semillon	847	776	520	-449	1,695	776	402	517	1,695	787	354	554
Traminer	101	176	51	-126	202	176	119	-93	202	208	119	-126
Verdelho	0	16	0	-16	0	16	0	-16	0	16	0	-16
Viognier	86	39	27	20	196	66	152	-23	196	66	174	-44
Total white winegrapes	**8,393**	**6,119**	**6,637**	**-4,363**	**17,317**	**6,530**	**6,398**	**4,388**	**17,317**	**6,698**	**5,065**	**5,553**
Total all winegrapes	**20,964**	**15,975**	**19,197**	**-14,208**	**42,709**	**16,483**	**15,537**	**10,690**	**42,709**	**17,254**	**10,704**	**14,751**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.085 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*



Coonawarra Wine Region

Regional summary report

2007

Coonawarra

Vintage overview

Vintage report

A low yielding vintage, with warm ripening conditions, resulted in good quality, clean fruit showing intense fruit characters with the potential for admirable quality wines. However, the yields across all varieties were well below average.

It was a difficult growing season with severe widespread spring frosts coupled with unusually dry spring and summer conditions. A drenching rainfall in early January revitalised the vines, restoring soil moisture, which allowed the vines to develop flavour and colour in the grapes.

Although flowering and set were slightly uneven, berry size remained small, and combined with the dry conditions, the red varieties matured the grapes with no disease pressures. Cabernet Sauvignon with strong flavour and spicy tannins is particularly pleasing. Merlot enjoyed the seasonal conditions and ripened beautifully with soft varietal expression and exceptional colour. Shiraz with flavour ripeness developed generous rich fruit.

All white varieties are showing a good balance of acid and fruit with elegant fruit characters, particularly Sauvignon Blanc, which enjoyed the benefit of cool nights and warm days in the lead-up to harvest and is displaying distinct varietal flavours and characteristics.

Coonawarra Grapegrowers' Association

Overview of vintage statistics

The harvest from Coonawarra was 17,026 tonnes in 2007, nearly 50% below 2006, and the lowest crop for the region for at least 15 years (since survey records started in 1993). The total value of grapes from the region decreased from $28 million to $22 million – a fall in value of only 21%. The average purchase value for Cabernet Sauvignon increased by $560 per tonne (over 50%) due to the lack of supply.

New plantings in Coonawarra in spring 2006 (including top-working and replacements) were negligible for the second year in a row. However, as appears to be the case across South Australia, there is no indication of any significant removal of grapevines being undertaken.

The estimated production from the Coonawarra region for 2008 is 36,000 tonnes due to the after-effects of the severe frosts in 2006, and ongoing dry conditions. The wineries' committed intake is also around 36,000 tonnes, so there is not expected to be any surplus fruit. By 2012, assuming a return to normal growing conditions, the estimated production is 48,000 tonnes, of which 69% (33,000 tonnes) is already under contract or winery grown fruit. This leaves around 15,000 tonnes available on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Coonawarra

Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	103			$66,835	$650	156	259	$167,988
Cabernet Sauvignon	3,782	$500	$3,500	$5,579,373	$1,475	5,338	9,120	$13,454,776
Malbec	9			$8,352	$900	92	101	$91,260
Merlot	563	$652	$1,700	$558,220	$992	510	1,073	$1,064,538
Other Red	1			$385	$550	18	19	$10,247
Petit Verdot	106			$110,066	$1,042	6	112	$116,412
Pinot Noir	12			$10,285	$857	123	135	$115,681
Sangiovese	0					1	1	$989
Shiraz	920	$600	$5,000	$1075,633	$1,169	2,637	3,556	$4,158,675
Total red winegrapes	**5,495**			**$7,409,149**		**8,881**	**14,376**	**$19,181,153**
WHITE								
Chardonnay	488	$551	$2,000	$399,924	$820	1,576	2,064	$1,691,894
Other White	0					9	9	$9,315
Riesling	0					276	276	$275,978
Sauvignon Blanc	172	$1,260	$2,000	$260,873	$1,520	111	283	$430,269
Semillon	1			$341	$550	2	3	$1,551
Traminer	0					15	15	$15,025
Viognier	0					1	1	$1,002
Total white winegrapes	**660**			**$661,138**		**1,990**	**2,650**	**$2,425,035**
Total all winegrapes	**6,155**			**$8,070,287**		**10,871**	**17,026**	**$21,606,188**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

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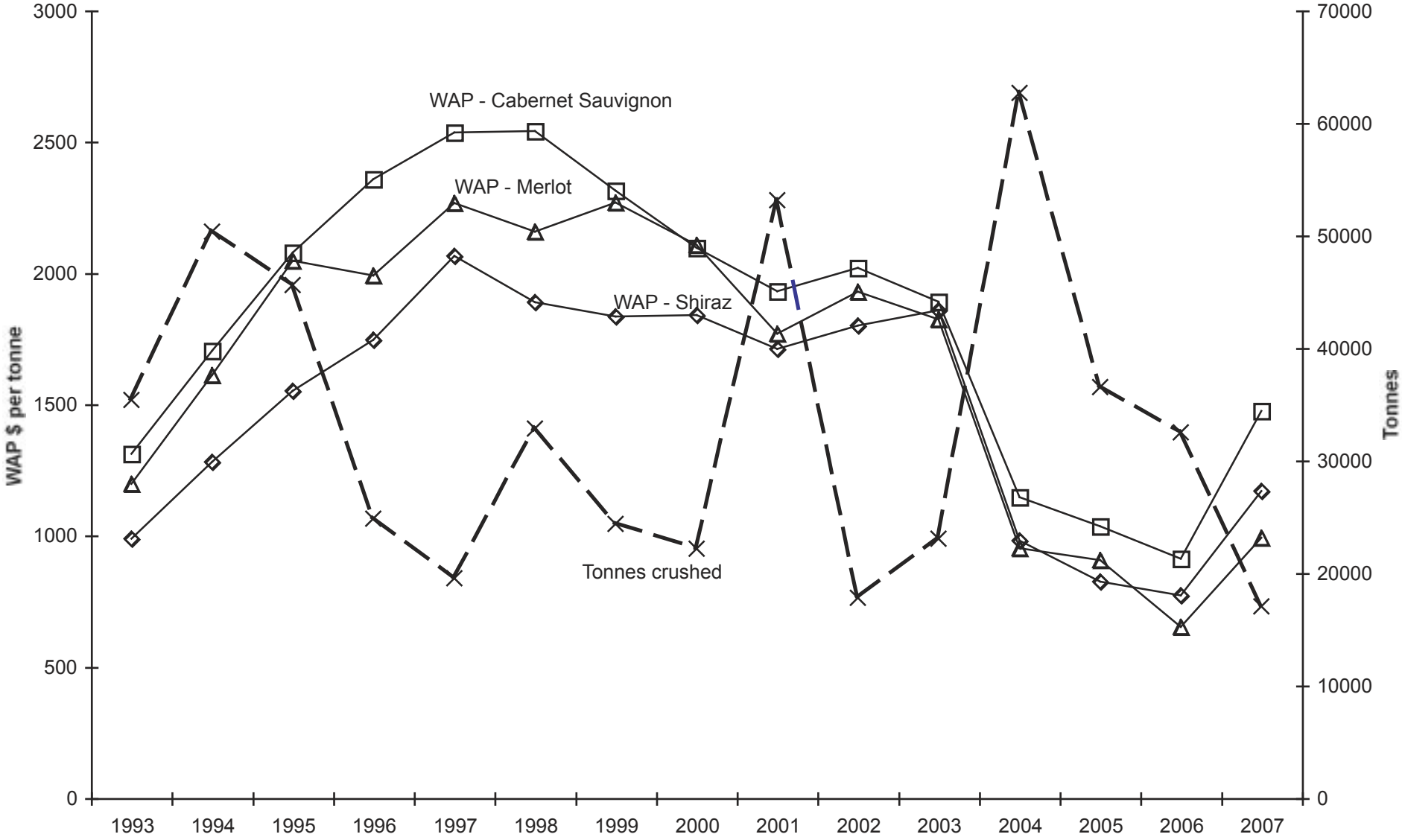
Coonawarra

Historical WAP vs tonnes crushed



Coonawarra

Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Franc	34	0	0	0	34	*0%*	206	274	274	274	274
Cabernet Sauvignon	3340	54	2	0	3396	*0%*	20202	27159	27166	27166	27166
Malbec	16	0	0	0	16	*0%*	95	126	126	126	126
Merlot	426	1	0	0	427	*0%*	2559	3416	3416	3416	3416
Other red	6	1	0	0	7	*0%*	37	53	53	53	53
Petit Verdot	22	0	0	0	22	*0%*	134	178	178	178	178
Pinot Noir	52	0	0	2	54	*4%*	312	417	425	425	425
Shiraz	1188	24	2	0	1214	*0%*	7199	9705	9713	9713	9713
Total red winegrapes	**5084**	**80**	**4**	**2**	**5170**	***0%***	**30743**	**41328**	**41352**	**41352**	**41352**
White winegrapes											
Chardonnay	415	17	0	0	432	*0%*	3387	4318	4318	4318	4318
Other white	7	0	0	1	8	*13%*	55	68	73	73	73
Riesling	143	3	0	0	146	*0%*	1153	1458	1458	1458	1458
Sauvignon Blanc	85	5	4	5	99	*5%*	699	920	966	966	966
Viognier	3	5	0	0	8	*0%*	42	78	78	78	78
Total white winegrapes	**652**	**31**	**4**	**6**	**692**	***1%***	**5335**	**6843**	**6894**	**6894**	**6894**
Total all varieties	**5735**	**111**	**8**	**8**	**5862**	***0%***	**36078**	**48170**	**48246**	**48246**	**48246**

Coonawarra

Estimated supply and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	206	201	111	-107	274	201	103	-30	274	201	103	-30
Cabernet Sauvignon	20,202	12,032	8,653	-483	27,166	12,493	5,908	8,766	27,166	12,191	4,967	10,008
Malbec	95	60	19	16	126	76	0	50	126	97	0	29
Merlot	2,559	1,105	1,231	223	3,416	1,270	903	1,243	3,416	1,270	810	1,337
Other Red	37	27	11	-2	53	29	21	2	53	35	21	-3
Petit Verdot	134	22	114	-3	178	50	120	8	178	50	120	8
Pinot Noir	312	300	69	-56	425	216	22	187	425	317	22	86
Sangiovese	0	1	0	-1	0	1	0	-1	0	1	0	-1
Shiraz	7,199	5,460	2,109	-370	9,713	6,032	2,088	1,593	9,713	6,022	1,907	1,785
Tempranillo	0	11	0	-11	0	11	0	-11	0	11	0	-11
Total red winegrapes	**30,743**	**19,220**	**12,317**	**-793**	**41,352**	**20,379**	**9,165**	**11,808**	**41,352**	**20,195**	**7,949**	**13,208**
White winegrapes												
Chardonnay	3,387	2,049	1,125	212	4,318	2,219	1,037	1,062	4,318	2,269	900	1,149
Other White	55	0	0	55	73	0	0	73	73	0	0	73
Riesling	1,153	1,004	18	131	1,458	1,137	55	266	1,458	1,137	76	245
Sauvignon Blanc	699	258	323	119	966	316	226	424	966	372	211	383
Semillon	0	20	5	-25	0	12	5	-17	0	23	5	-28
Traminer	0	37	0	-37	0	37	0	-37	0	37	0	-37
Viognier	42	12	0	29	78	12	0	66	78	12	0	66
Total white winegrapes	**5,335**	**3,380**	**1,471**	**483**	**6,894**	**3,733**	**1,323**	**1,838**	**6,894**	**3,850**	**1,192**	**1,852**
Total all winegrapes	**36,078**	**22,600**	**13,788**	**-310**	**48,246**	**24,112**	**10,488**	**13,645**	**48,246**	**24,044**	**9,142**	**15,060**

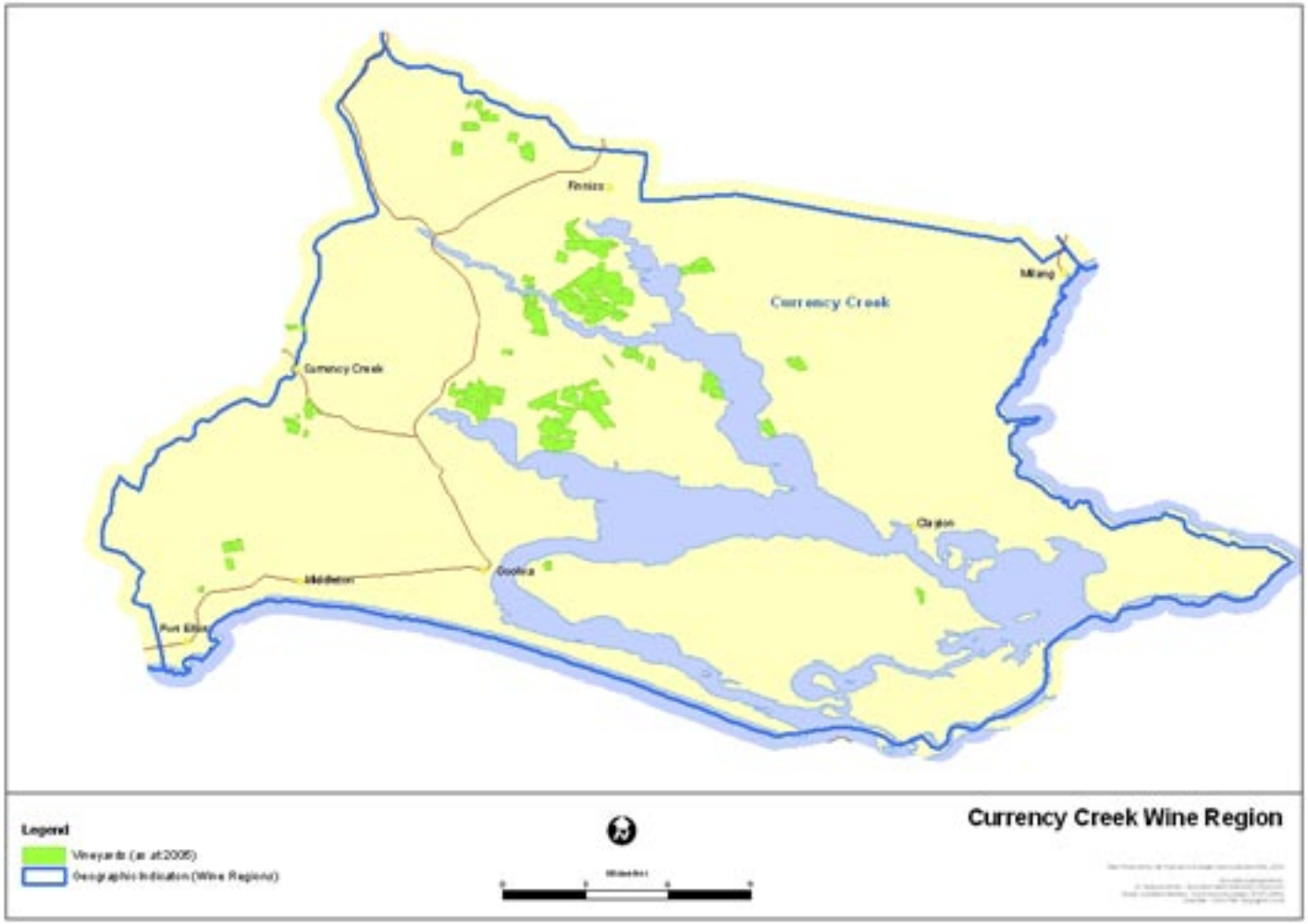
[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.015 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

Currency Creek Wine Region

Regional summary report 2007



Currency Creek

Vintage overview

Vintage report

The 2006 spring season in the Currency Creek Region was quite dry and cool but thankfully included little frost damage. The only negative result of this combination of conditions was short shoot length, particularly in Merlot and some bud mite activity at the pre-budburst stage. The Merlot subsequently responded positively to the warmer weather later in the season and while not replacing all of the normal shoot length, did achieve adequate vigour to successfully ripen the crops.

While the subsequent dry conditions led to low disease pressure, sub-soil moisture was reduced significantly and resulted in generally reduced vine vigour. Those growers who rely upon River Murray water were affected by the reduced water allocation but not to the same extent as growers in the warmer regions.

Bunch numbers were normal for most varieties but bunch weights were reduced overall. Individual crops recorded yield reductions of up to 50% and this resulted in the average yields for the region overall being 25% to 30% down from normal yearly production. Red yields were generally more severely affected than whites. The sandy soils fared better than the heavier soils and the later flowering crops were less generally less affected than the earlier crops. In some cases variation in fruit maturity required some bunch thinning to remove green fruit.

The final ripening took place in ideal conditions with few extremes of temperature or wind. Despite this, picking dates were mainly two to three weeks earlier than normal and could not entirely be explained by lighter yields, as even the average yielding crops came in early.

Despite the seasonal problems, quality was very good this year for both reds and whites, due as much as anything to the maturing vineyards in what is mostly a recently planted district. Many of the blocks are now approaching ten years old and showing commensurate evenness and balance. This is resulting in fruit that is showing a significant step up in quality from previous years and provides an indication of the future potential of this region.

Overall, the 2007 vintage was good for Currency Creek with the yield reductions being offset by a strong increase in quality and product demand.

David Watkins
President
Currency Creek Wine Region Association

Overview of vintage statistics

The harvest from Currency Creek was 6,483 tonnes in 2007, compared with 10,696 tonnes in 2006 (a very big year). The total value of grapes from the region is estimated to be around $6.5 million, compared with $9 million in 2006. The average purchase value for Cabernet Sauvignon increased from $781 to $946 per tonne, while Shiraz increased from $976 to $1158.

New plantings in Currency Creek in spring 2006 (including top-working and replacements) were around 24 hectares (3% of the total area). Almost all the new plantings were in Sauvignon Blanc.

The estimated production from Currency Creek vineyards for 2008 is around 10,000 tonnes – slightly less than the 2006 crush. The amount of fruit already committed to the wineries is less than 5,000 tonnes – leaving nearly 6,000 tonnes available on the open market. Any uncontracted fruit is likely to be in demand, as shortfalls are predicted across the state, due to water restrictions and the after-effects of drought and frost in other regions (see State Summary section).

By 2012, the estimated production is around 11,500 tonnes, of which only 25% (3,000 tonnes) is already committed. This leaves around 8,000 tonnes of uncontracted fruit. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to “normal” (see State Summary section for details).

Currency Creek — Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Sauvignon	1,893	$700	$1,685	$1,795,773	$949	227	2,119	$2,010,931
Grenache	53			$52,690	$1,000	41	94	$93,750
Merlot	299	$600	$1,200	$251,502	$840	397	696	$584,807
Other Red	1			$825	$750	0	1	$825
Petit Verdot	0					12	12	$12,359
Pinot Noir	0					24	24	$24,698
Sangiovese	18			$25,396	$1,400	0	18	$25,396
Shiraz	1,607	$650	$2,000	$1,859,923	$1,158	493	2,100	$2,430,719
Tempranillo	5			$5,262	$1,078	0	5	$5,262
Total red winegrapes	**3,875**			**$3,991,371**		**1,194**	**5,069**	**$5,188,746**
WHITE								
Chardonnay	605	$600	$1,100	$547,530	$904	186	791	$715,406
Pinot Gris	79			$142,290	$1,800	41	120	$216,090
Riesling	100			$90,029	$904	16	116	$104,916
Sauvignon Blanc	134	$1,000	$1,650	$176,566	$1,314	151	285	$374,456
Semillon	24			$16,996	$701	59	83	$58,476
Traminer	19			$20,900	$1,100	0	19	$20,900
Total white winegrapes	**962**			**$994,311**		**453**	**1,414**	**$1,490,244**
Total all winegrapes	**4,837**			**$4,985,682**		**1,646**	**6,483**	**$6,678,991**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Currency Creek — Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Sauvignon	279	0	0	0	279	*0%*	3345	3345	3345	3345	3379
Grenache	11	0	0	0	11	*0%*	132	132	132	132	133
Merlot	63	0	0	0	63	*0%*	759	759	759	759	766
Nebbiolo	1	0	0	0	1	*0%*	8	8	8	8	8
Petit Verdot	5	0	0	0	5	*0%*	59	59	59	59	59
Pinot Noir	3	0	0	0	3	*0%*	39	39	39	39	39
Sangiovese	4	0	0	0	4	*0%*	46	46	46	46	47
Shiraz	302	0	3	2	307	*1%*	3641	3671	3686	3704	3741
Tempranillo	5	0	0	0	5	*0%*	55	55	55	55	55
Total red winegrapes	**673**	**0**	**3**	**2**	**677**	***0%***	**8084**	**8113**	**8128**	**8146**	**8228**
White winegrapes											
Chardonnay	58	61	3	4	125	*3%*	1394	1606	1633	1675	1692
Pinot Gris	0	11	5	0	16	*0%*	144	199	212	212	214
Riesling	13	0	0	0	13	*0%*	165	165	165	165	167
Roussanne	1	0	0	0	1	*0%*	9	9	9	9	9
Sauvignon Blanc	33	5	3	15	55	*27%*	492	673	715	809	817
Semillon	5	0	0	1	6	*17%*	64	75	80	90	91
Traminer	6	0	0	0	6	*0%*	84	84	84	84	85
Viognier	4	0	0	2	6	*33%*	54	75	86	107	108
Vermantino	0	0	3	0	3	*0%*	13	26	33	33	33
Total white winegrapes	**120**	**77**	**13**	**22**	**231**	***9%***	**2419**	**2911**	**3017**	**3183**	**3215**
Total all varieties	**792**	**77**	**15**	**24**	**908**	***3%***	**10503**	**11025**	**11145**	**11329**	**11443**

Currency Creek — Estimated production and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Sauvignon	3,345	644	266	2,436	3,345	644	100	2,601	3,379	647	50	2,682
Grenache	132	15	0	117	132	15	0	117	133	15	0	118
Merlot	759	516	112	130	759	516	42	200	766	516	42	208
Other Red	8	0	0	8	8	0	0	8	8	0	0	8
Petit Verdot	59	20	0	39	59	20	0	39	59	20	0	39
Pinot Noir	39	15	0	24	39	20	0	19	39	20	0	19
Sangiovese	46	0	0	46	46	0	0	46	47	0	0	47
Shiraz	3,641	717	487	2,437	3,686	772	290	2,625	3,741	772	99	2,870
Tempranillo	55	0	0	55	55	0	0	55	55	0	0	55
Total red winegrapes	**8,084**	**1,926**	**865**	**5,292**	**8,128**	**1,987**	**432**	**5,710**	**8,228**	**1,990**	**191**	**6,047**
White winegrapes												
Chardonnay	1,394	160	1,001	232	1,633	160	1,001	472	1,692	160	0	1,531
Pinot Gris	144	0	145	-2	212	0	155	57	214	150	20	44
Riesling	165	70	50	45	165	70	50	45	167	70	0	97
Sauvignon Blanc	492	185	120	186	715	185	120	410	817	311	0	506
Semillon	64	36	0	28	80	36	0	44	91	36	0	55
Traminer	84	0	0	84	84	0	0	84	85	0	0	85
Total white winegrapes	**2,419**	**452**	**1,317**	**650**	**3,017**	**452**	**1,327**	**1,238**	**3,215**	**728**	**20**	**2,467**
Total all winegrapes	**10,503**	**2,379**	**2,182**	**5,942**	**11,145**	**2,439**	**1,759**	**6,947**	**11,443**	**2,717**	**211**	**8,514**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.002 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

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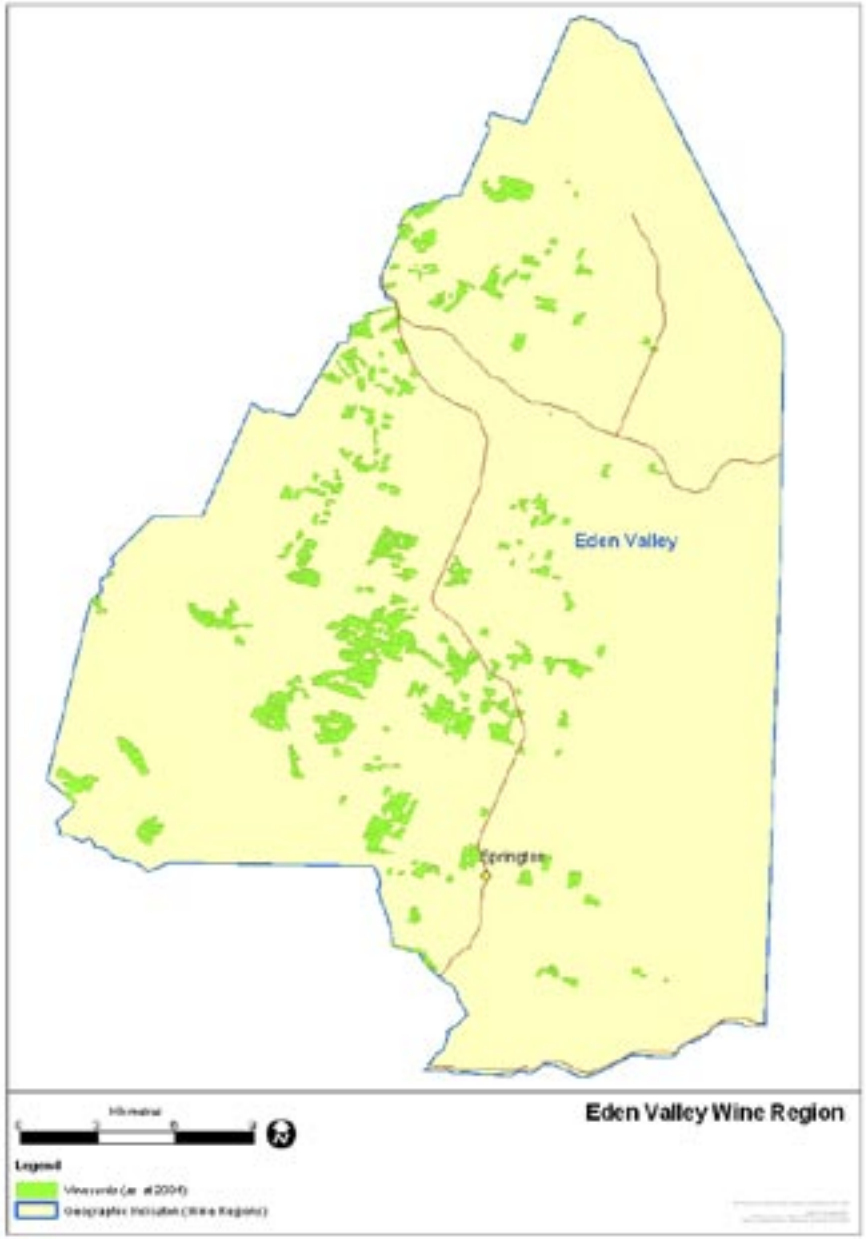

Eden Valley Wine Region

Regional summary report

2007

Eden Valley

Vintage overview

Vintage report

Average winter rainfall for the Eden Valley region is 188mm, but in 2007 there was approximately 40% less than this; a significant reduction. A similar trend was apparent in spring with the region only receiving 72mm which was 39% below average. As a result, irrigations commenced a few weeks after budburst (early October) to accelerate canopy growth prior to flowering.

Minimum temperatures were approximately 1°C below average with small pockets of vineyards experiencing inflorescence damage due to the inversion layer frost in late October. Above average maximum and minimum temperatures were experienced for the months of November and December. In November, the minimum temperature was 3.5°C above average. These relatively high temperatures, coupled with low humidity readings, promoted premature vine phenology stages, with flowering occurring on average three weeks earlier than the 'norm'.

A welcome rainfall event in late January brought 50mm to this region, helping to maintain very tired, drought-stricken canopies through to harvest. No splitting occurred as berry phenology was not in its advanced stages. Short but frequent irrigations maintained tired vine canopies without too much basal leaf senescence despite water shortages in vineyards that were totally reliant upon dam run-off water.

Harvest was approximately two weeks early for this region with crop loads on white varieties on par with average tonnages. The majority of red varieties that were picked by the end of March were above average due to a 'surge' in berry size after another rain in mid-March. After harvest, white varieties entered dormancy at a rapid rate as they had performed to their maximum under tough growing conditions in 2006 and 2007.

Robin Nettelbeck
Phylloxera and Grape Industry Board

Overview of vintage statistics

The harvest from Eden Valley was 8,607, compared with 12,703 tonnes in 2006. The total value of grapes from the region decreased from $14 million to $11 million; however, the average purchase value for the major varieties increased slightly (Riesling and Chardonnay by $50 per tonne, Cabernet Sauvignon by $200 per tonne and Shiraz by $350 per tonne).

New plantings in Eden Valley in spring 2006 (including top-working and replacements) amounted to 16 hectares (less than 1% of the total area) – mainly in white varieties. While this is a very small amount, there is no indication of any significant removal of grapevines being undertaken in the region.

The estimated production from Eden Valley for 2008 is around 12,000 tonnes – below its potential as a result of ongoing dry conditions and after-effects of frost. The wineries' committed intake is around 13,000 tonnes, so there is not expected to be any surplus fruit. By 2012, the estimated production is nearly 20,000 tonnes, assuming normal growing conditions, of which 74% (14,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 6,000 tonnes to be sold on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Eden Valley

Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	5			$8,448	$1,594	2	7	$11,636
Cabernet Sauvignon	379	$400	$5,730	$457,797	$1,208	522	901	$1,088,123
Grenache	10	$400	$1,000	$7,750	$783	8	18	$14,013
Mataro	57			$68,436	$1,194	0	57	$68,436
Merlot	156	$800	$1,100	$147,872	$946	170	327	$309,054
Other Red	8			$16,073	$2,143	21	29	$61,527
Petit Verdot	4			$5,198	$1,181	0	4	$5,198
Pinot Noir	175	$750	$1,400	$199,183	$1,138	158	334	$379,554
Shiraz	1,256	$400	$7,000	$1,979,816	$1,576	523	1,779	$2,804,177
Tempranillo	0					6	6	$7,885
Total red winegrapes	**2,051**			**$2,890,573**		**1,411**	**3,462**	**$4,749,603**
WHITE								
Chardonnay	597	$600	$1,325	$617,729	$1,034	632	1,229	$1,271,395
Other White	14	$500	$1,000	$11,708	$825	0	14	$11,708
Pinot Gris	14			$16,800	$1,200	66	80	$96,480
Riesling	1,407	$400	$2,300	$1,761,525	$1,252	1,516	2,923	$3,658,832
Sauvignon Blanc	86	$1,200	$1,594	$124,098	$1,438	176	262	$376,730
Semillon	260	$600	$1,500	$247,852	$952	52	312	$297,153
Traminer	90	$810	$1,400	$98,634	$1,099	48	138	$151,351
Verdelho	3			$2,489	$750	0	3	$2,489
Viognier	134			$224,509	$1,679	49	183	$306,672
Total white winegrapes	**2,606**			**$3,105,343**		**2,539**	**5,145**	**$6,172,811**
Total all winegrapes	**4,657**			**$5,995,916**		**3,949**	**8,607**	**$10,922,414**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Eden Valley

Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Franc	5	0	0	0	5	*0%*	23	28	37	37	37
Cabernet Sauvignon	318	0	0	0	318	*0%*	1589	1906	2542	2542	2542
Grenache	30	0	0	0	30	*0%*	148	178	237	237	237
Mataro (Mourvedre)	7	0	0	0	7	*0%*	37	45	59	59	59
Merlot	89	2	0	0	91	*0%*	449	544	726	726	726
Other red	17	1	0	0	17	*0%*	85	104	139	139	139
Petit Verdot	11	0	0	0	11	*0%*	55	66	88	88	88
Pinot Noir	64	0	3	4	71	*6%*	322	395	553	586	586
Shiraz	711	1	0	0	712	*0%*	3559	4274	5698	5698	5698
Total red winegrapes	**1251**	**4**	**3**	**4**	**1262**	***0%***	**6267**	**7538**	**10078**	**10111**	**10111**
White winegrapes											
Chardonnay	281	3	3	6	294	*2%*	1696	1999	2614	2671	2671
Muscat Blanc (Frontignac)	7	0	0	0	7	*0%*	42	49	63	63	63
Other white	5	1	1	0	7	*6%*	33	43	59	63	63
Pinot Gris	17	3	4	3	28	*12%*	115	158	236	264	264
Riesling	512	18	8	0	538	*0%*	3135	3736	4840	4840	4840
Sauvignon Blanc	46	7	2	2	56	*3%*	302	377	501	515	515
Semillon	55	0	0	0	55	*0%*	331	386	497	497	497
Traminer	34	0	0	0	34	*0%*	204	238	307	307	307
Viognier	39	2	6	1	48	*2%*	244	311	428	436	436
Total white winegrapes	**997**	**34**	**23**	**12**	**1067**	***1%***	**6103**	**7298**	**9544**	**9655**	**9655**
Total all varieties	**2248**	**38**	**26**	**16**	**2328**	***1%***	**12370**	**14836**	**19622**	**19766**	**19766**

Eden Valley

Estimated production and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	23	3	13	6	37	3	13	20	37	3	13	20
Cabernet Sauvignon	1,589	1,108	828	-348	2,542	1,108	610	823	2,542	1,108	588	845
Grenache	148	20	101	27	237	20	101	116	237	20	13	204
Mataro	37	0	60	-23	59	0	60	-1	59	0	60	-1
Merlot	449	196	251	3	726	196	251	279	726	196	251	279
Other Red	85	52	19	13	139	52	19	67	139	52	19	67
Petit Verdot	55	0	6	49	88	0	6	82	88	0	6	82
Pinot Noir	322	273	180	-131	553	273	187	93	586	273	187	126
Shiraz	3,559	1,013	1,898	648	5,698	1,107	1,761	2,830	5,698	1,107	1,739	2,852
Tempranillo	0	4	0	-4	0	4	0	-4	0	4	0	-4
Total red winegrapes	**6,267**	**2,670**	**3,357**	**240**	**10,078**	**2,765**	**3,009**	**4,304**	**10,111**	**2,765**	**2,876**	**4,469**
White winegrapes												
Chardonnay	1,696	1,249	756	-310	2,614	1,254	797	563	2,671	1,254	802	615
Other White	76	0	61	14	123	0	61	61	126	0	30	96
Pinot Gris	115	117	39	-41	236	117	72	46	264	117	72	75
Riesling	3,135	2,095	2,212	-1,172	4,840	2,115	2,149	576	4,840	2,138	2,108	594
Sauvignon Blanc	302	341	123	-162	501	346	203	-48	515	346	214	-45
Semillon	331	81	432	-182	497	92	432	-28	497	92	432	-28
Traminer	204	72	126	6	307	72	143	92	307	72	143	92
Verdelho	0	0	6	-6	0	0	6	-6	0	0	6	-6
Viognier	244	101	277	-134	428	102	280	46	436	102	280	54
Total white winegrapes	**6,103**	**4,056**	**4,033**	**-1,986**	**9,544**	**4,100**	**4,142**	**1,302**	**9,655**	**4,123**	**4,086**	**1,446**
Total all winegrapes	**12,370**	**6,727**	**7,389**	**-1,746**	**19,622**	**6,865**	**7,151**	**5,606**	**19,766**	**6,888**	**6,963**	**5,915**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.114 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

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Fleurieu zone - other

Regional summary report 2007

Fleurieu zone (other) includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are near but outside the larger GI regions of Currency Creek, McLaren Vale and Langhorne Creek (referred to as "Fleurieu zone (other)" in tables). The total area of vines included in this definition is around 750 hectares.

Overview of vintage statistics

The harvest from Fleurieu zone (other) was 3,669 tonnes in 2007. This is slightly below the 2006 harvest; however the total estimated value of grapes from these vineyards increased by 20% to $4.2 million.

There were 16 hectares of new plantings in this area in spring 2006, 14 of which were Sauvignon Blanc in Southern Fleurieu.

The estimated production for this area in 2008 is around 6,000 tonnes – one third of which is not committed to the wineries. By 2012 production is estimated to increase to 7,000 tonnes, of which 2,500 tonnes is likely to be available on the open market.

There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Fleurieu zone (other) Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	0					4	4	$3,891
Cabernet Sauvignon	472	$700	$1,500	$530,318	$1,124	103	575	$645,829
Grenache	21			$22,990	$1,100	4	25	$27,280
Malbec	0					5	5	$5,003
Merlot	141	$850	$1,500	$185,901	$1,321	8	149	$196,468
Other Red	11			$16,320	$1,500	0	11	$16,320
Petit Verdot	24			$27,785	$1,144	0	24	$27,785
Pinot Noir	88	$1,050	$1,500	$112,258	$1,275	17	105	$133,554
Sangiovese	0					2	2	$2,446
Shiraz	1,250	$350	$2,041	$1,335,436	$1,068	83	1,333	$1,424,010
Total red winegrapes	**2,007**			**$2,231,008**		**225**	**2,231**	**$2,482,586**
WHITE								
Chardonnay	706	$450	$1,600	$701,449	$993	51	757	$751,614
Chenin Blanc	0					1	1	$1,215
Pinot Gris	62			$122,737	$1,980	3	65	$128,478
Riesling	118	$950	$1,300	$134,412	$1,138	23	141	$160,010
Sauvignon Blanc	246	$1,200	$2,000	$441,977	$1,800	48	293	$527,672
Semillon	80			$65,668	$817	49	129	$105,617
Traminer	0					1	1	$1,215
Verdelho	8			$8,420	$1,002	0	8	$8,420
Viognier	12			$23,674	$1,909	30	43	$81,332
Total white winegrapes	**1,233**			**$1,498,336**		**205**	**1,438**	**$1,765,572**
Total all winegrapes	**3,240**			**$3,729,344**		**429**	**3,669**	**$4,248,158**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Fleurieu zone (other) Current plantings and projected production 2008 - 2012

		Current area in hectares by year planted						Estimated production 2008 - 2012				
	Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Southern Fleurieu	Cabernet Sauvignon	74	0	0	0	75	*0%*	671	672	672	672	672
	Merlot	34	0	0	0	34	*0%*	304	305	305	305	305
	Other red	2	0	0	0	2	*0%*	15	15	15	15	15
	Pinot Noir	26	0	0	0	26	*0%*	238	238	238	238	238
	Shiraz	94	0	0	0	94	*0%*	846	846	846	846	846
	Chardonnay	73	3	0	0	76	*0%*	748	763	763	763	763
	Other white	10	0	0	0	10	*0%*	100	101	101	101	101
	Pinot Gris	4	2	0	2	8	*26%*	49	57	67	87	87
	Riesling	9	0	0	0	9	*0%*	93	93	93	93	93
	Sauvignon Blanc	36	0	1	14	51	*27%*	356	362	437	541	541
	Semillon	21	0	0	0	21	*0%*	211	211	211	211	211
	Viognier	9	2	0	0	11	*0%*	103	113	113	113	113
	Total all varieties	**393**	**7**	**1**	**16**	**417**	***4%***	**3733**	**3775**	**3861**	**3984**	**3984**
Kangaroo Island	Cabernet Sauvignon	42	0	0	0	42	*0%*	212	212	212	212	214
	Other red	15	0	0	0	15	*0%*	181	181	181	181	183
	Shiraz	36	0	0	0	36	*0%*	77	77	77	77	78
	Chardonnay	11	0	0	0	11	*0%*	65	65	65	65	66
	Pinot Gris	0	1	0	0	1	*0%*	2	3	3	3	3
	Riesling	3	0	0	0	3	*0%*	17	17	17	17	18
	Sauvignon Blanc	2	1	0	0	3	*0%*	19	21	21	21	21
	Semillon	1	0	0	0	1	*0%*	3	3	3	3	3
	Viognier	1	0	0	0	1	*0%*	3	3	3	3	3
	Total all varieties	**111**	**2**	**0**	**0**	**113**	***0%***	**580**	**582**	**582**	**582**	**588**
Fleurieu zone other	Cabernet Sauvignon	40	0	0	0	40	*0%*	403	403	403	403	403
	Other red	7	0	0	0	7	*0%*	69	69	69	69	69
	Shiraz	61	32	0	0	92	*0%*	766	924	924	924	924
	Chardonnay	33	26	0	0	59	*0%*	551	706	706	706	706
	Riesling	2	0	0	0	2	*0%*	24	24	24	24	24
	Sauvignon Blanc	0	8	0	0	9	*0%*	55	105	105	105	105
	Semillon	4	0	0	0	4	*0%*	48	48	48	48	48
	Viognier	5	0	0	0	6	*0%*	66	67	67	67	67
	Total all varieties	**153**	**66**	**0**	**0**	**219**	***0%***	**1982**	**2347**	**2347**	**2347**	**2347**
Total Fleurieu zone (other)		**656**	**75**	**1**	**16**	**748**	***2%***	**6295**	**6704**	**6789**	**6913**	**6919**

Fleurieu zone (other) Estimated production and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	23	11	0	12	23	0	0	23	23	0	0	23
Cabernet Sauvignon	1,286	221	576	489	1,286	229	549	508	1,289	233	483	572
Grenache	8	6	0	2	8	6	0	2	8	6	0	2
Malbec	27	5	0	22	27	6	0	20	27	6	0	21
Merlot	318	22	0	295	319	26	0	293	319	28	0	291
Other Red	15	0	0	15	15	0	0	15	15	0	0	15
Petit Verdot	29	0	0	29	29	0	0	29	29	0	0	29
Pinot Noir	260	25	58	177	260	32	58	170	260	33	27	199
Sangiovese	18	3	0	15	18	0	0	18	18	0	0	18
Shiraz	1,793	121	1,545	127	1,952	133	1,613	206	1,953	145	1,507	301
Total red winegrapes	**3,781**	**415**	**2,179**	**1,188**	**3,942**	**433**	**2,220**	**1,289**	**3,946**	**452**	**2,017**	**1,477**
White winegrapes												
Chardonnay	1,364	86	1,006	273	1,534	88	1,006	441	1,535	91	936	508
Chenin Blanc	0	3	0	-3	0	3	0	-3	0	3	0	-3
Colombard	0	0	0	0	0	11	0	-11	0	11	0	-11
Pinot Gris	51	11	27	13	70	13	190	-134	90	17	251	-178
Riesling	134	30	99	5	134	30	99	5	134	30	57	47
Sauvignon Blanc	430	95	255	79	563	133	281	149	667	188	281	198
Semillon	262	61	57	144	262	67	57	138	262	67	0	194
Traminer	0	5	0	-5	0	5	0	-5	0	5	0	-5
Verdelho	55	0	16	39	55	0	16	39	55	0	0	55
Viognier	172	61	0	111	183	79	0	105	183	79	0	105
Total white winegrapes	**2,513**	**353**	**1,460**	**700**	**2,847**	**429**	**1,649**	**769**	**2,972**	**491**	**1,525**	**956**
Total all winegrapes	**6,295**	**768**	**3,639**	**1,888**	**6,789**	**862**	**3,870**	**2,058**	**6,919**	**943**	**3,542**	**2,433**

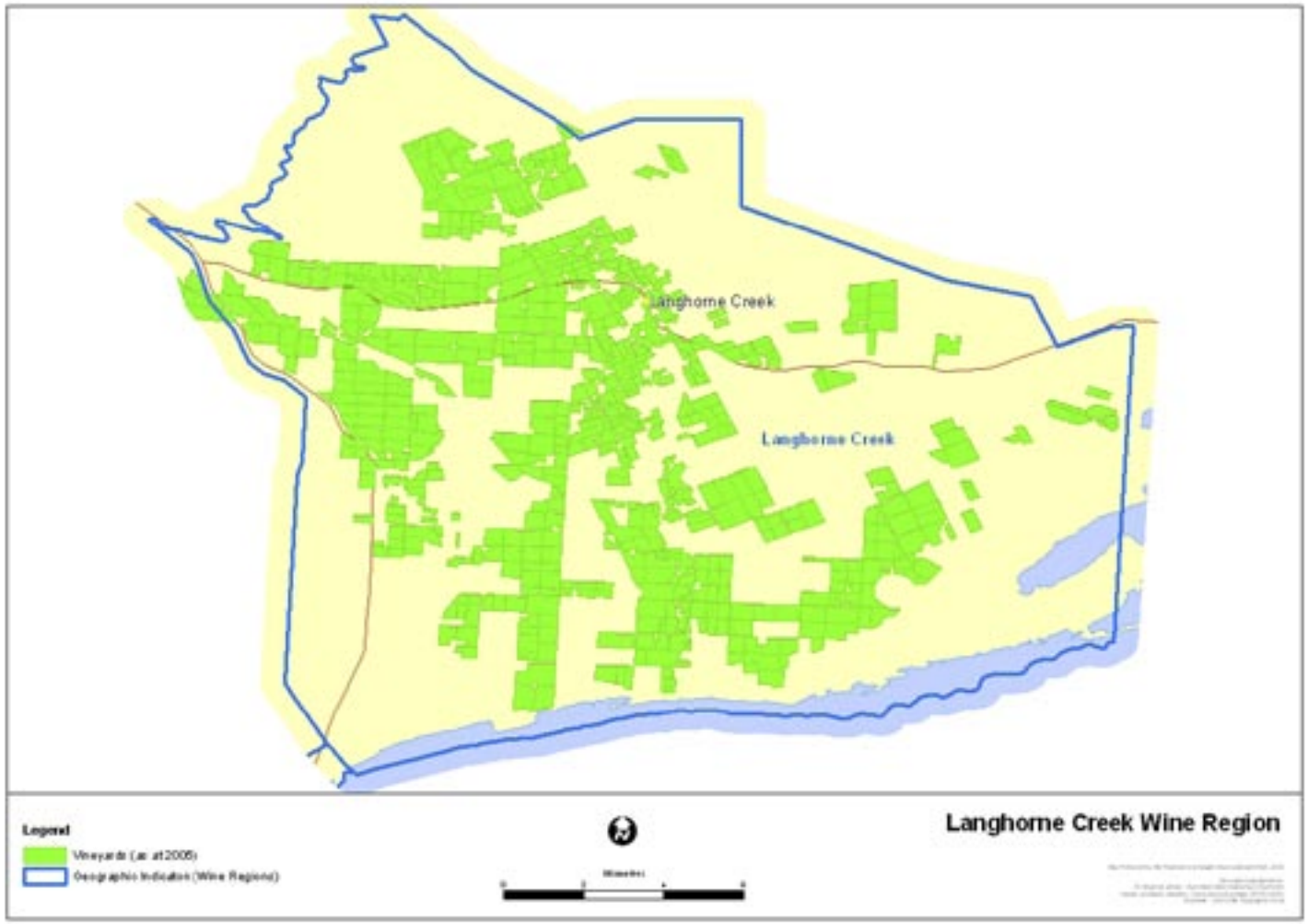
[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.069 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

Langhorne Creek Wine Region

Regional summary report 2007



Langhorne Creek

Vintage overview

Vintage report

A dry, mild season resulted in very low disease pressures, though rust mite was prevalent this year due to reduced use of sulphur sprays. However this was not a cause for concern.
Good consistent sunny days followed by cool nights allowed for ideal ripening, particularly red varieties.

Most vineyards (particularly reds) showed smaller canopies and low yields (district average around 2-3 tonne per acre, and up to 60% down in some vineyards), with small bunches and berry size. Most crops appeared reasonable but weight was lacking resulting in reported difficulties with fruit estimates.

It was an early start to vintage across the region with many beginning a good three weeks earlier on average. Harvest of the first fruit for sparkling base began at the end of January. Following an initial flurry of activity which saw some red varieties harvested promptly, the pace steadied resulting in most completing harvest by early-mid April.

Some excellent whites this year with good yields, balanced flavour profiles and intensity of fruit. Varietal characteristics strong with good natural acidity.

Apart from some early red harvesting (primarily Shiraz), most red varieties ripened slowly with Cabernet mid-late March across the district. Generally excellent colour in reds this year with some exceptional parcels that should translate into some very smart wines.

Chris Duffy
Langhorne Creek Wine Industry Council

Overview of vintage statistics

The harvest from Langhorne Creek was 40,393 tonnes in 2007, 40% down on the record crop of 2006, and the lowest in this region since 2000. Despite this, it was the largest crop of any South Australian region outside of the Riverland this year – exceeding the Barossa Valley by a few hundred tonnes. The total value of grapes from the region was reduced from $64 million to $40 million, with the average purchase value for most of the major varieties increasing slightly due to the shortage of supply (Shiraz increasing by $100 per tonne).

New plantings in Langhorne Creek in spring 2006 (including top-working and replacements) were 66 hectares (less than half the amount in 2005), of which half were in Shiraz.

The estimated production from Langhorne Creek for 2008 is 30,000 tonnes – less than half its full potential (this estimate is based on an assumption of a 40% water allocation by February 2008). The wineries' committed intake is more than double that amount, so there is not expected to be any surplus fruit. . By 2012, assuming a return to normal growing conditions, the estimated production is 71,000 tonnes, of which 66% (47,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 23,500 tonnes to be sold on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

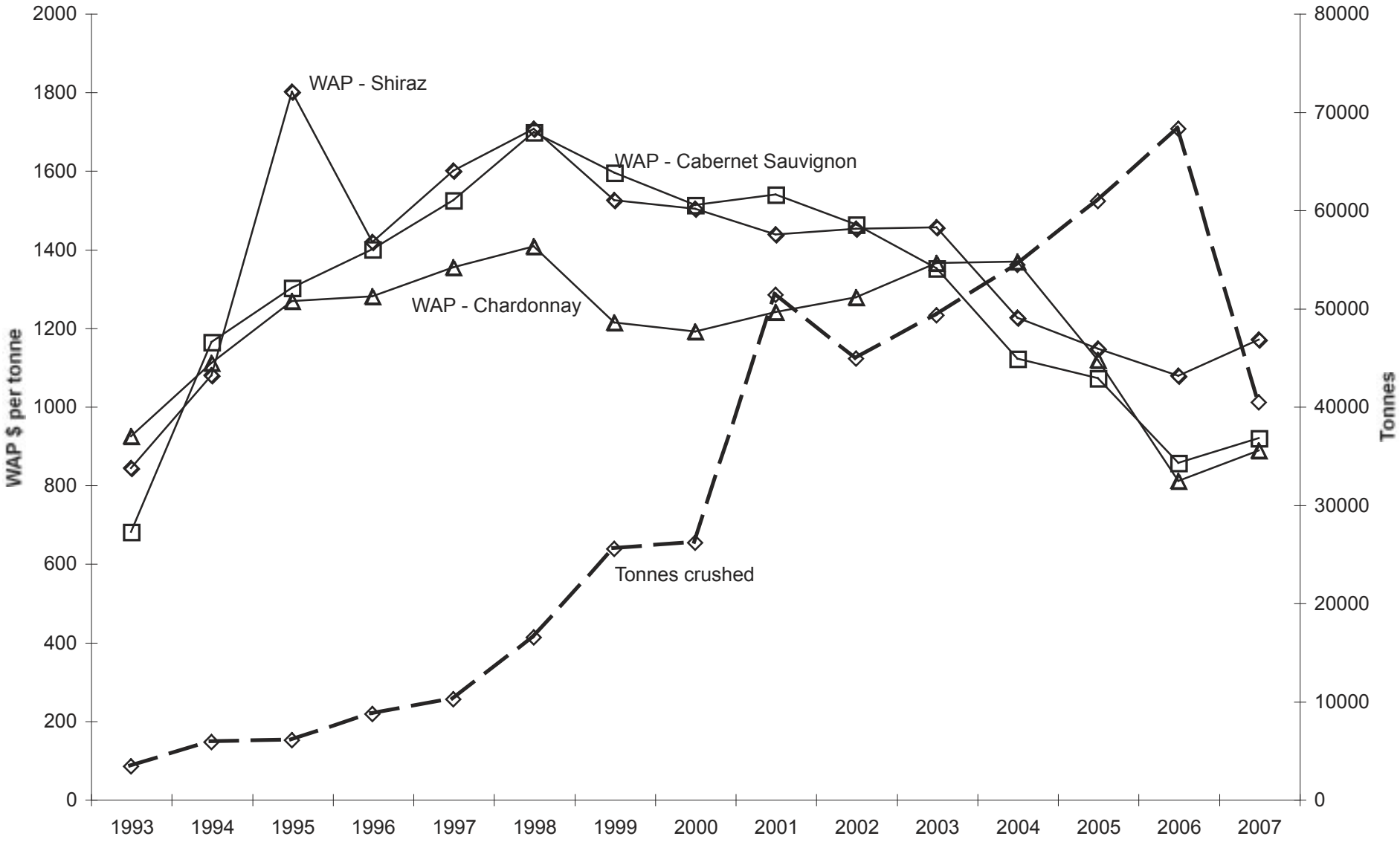
Langhorne Creek Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	35			$28,116	$807	36	71	$57,460
Cabernet Sauvignon	10,106	$500	$2,300	$9,283,596	$919	2,386	12,492	$11,475,145
Grenache	312	$600	$1,000	$258,767	$831	843	1,154	$958,798
Malbec	140	$500	$1,600	$145,174	$1,034	24	165	$170,414
Mataro	68			$75,031	$1,100	5	73	$80,531
Merlot	1,780	$400	$1,941	$1,802,993	$1,013	1,196	2,977	$3,014,446
Other Red	214	$650	$1,800	$273,985	$1,280	3	218	$278,335
Petit Verdot	331	$740	$1,200	$298,758	$904	117	448	$404,687
Pinot Noir	328	$684	$1,550	$372,589	$1,136	223	551	$626,018
Ruby Cabernet	0					52	52	$53,668
Sangiovese	394	$700	$1,800	$374,522	$951	40	434	$412,773
Shiraz	9,573	$400	$5,000	$11,203,383	$1,170	3,026	12,599	$14,744,435
Tempranillo	10			$13,938	$1,441	0	10	$13,938
Total red winegrapes	**23,291**			**$24,130,851**		**7,952**	**31,243**	**$32,290,650**
WHITE								
Chardonnay	4,948	$400	$1,787	$4,388,226	$887	1,202	6,150	$5,453,908
Chenin Blanc	0			$0	$0	11	11	$10,465
Pinot Gris	161	$1,372	$2,500	$291,363	$1,813	0	161	$291,363
Riesling	529			$529,687	$1,002	1,037	1,566	$1,568,339
Sauvignon Blanc	114	$1,000	$1,900	$160,635	$1,412	113	227	$320,761
Semillon	280			$192,035	$687	44	323	$221,979
Traminer	189			$170,379	$900	0	189	$170,379
Verdelho	353	$500	$1,599	$369,942	$1,047	102	455	$476,657
Viognier	64	$1,400	$1,700	$99,849	$1,558	3	67	$104,836
Total white winegrapes	**6,638**			**$6,202,115**		**2,512**	**9,150**	**$8,618,686**
Total all winegrapes	**29,929**			**$30,332,965**		**10,464**	**40,393**	**$40,909,336**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Langhorne Creek

Historical WAP vs tonnes crushed



Langhorne Creek — Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Franc	14	0	0	0	14	*0%*	71	100	142	142	144
Cabernet Sauvignon	2007	7	0	0	2014	*0%*	10061	16115	22158	22158	22380
Dolcetto	5	0	9	0	13	*0%*	23	73	130	130	132
Grenache	126	0	0	0	126	*0%*	630	882	1385	1385	1399
Lagrein	1	0	9	1	12	*13%*	6	52	112	126	128
Malbec	43	0	1	1	45	*2%*	216	306	443	450	455
Mataro (Mourvedre)	7	0	0	0	7	*0%*	37	52	74	74	75
Merlot	398	0	9	0	407	*0%*	1990	3234	4477	4477	4522
Nebbiolo	13	0	0	0	14	*0%*	67	96	138	138	139
Other red	15	2	3	0	20	*1%*	82	133	200	203	205
Petit Verdot	51	0	0	0	51	*0%*	257	359	513	513	519
Pinot Noir	52	0	0	0	52	*0%*	259	363	518	518	524
Sangiovese	53	0	0	0	53	*0%*	266	372	532	532	537
Shiraz	2057	20	4	35	2116	*2%*	10357	16643	23165	23544	23780
Zinfandel	7	1	1	5	14	*35%*	38	60	121	168	170
Total red winegrapes	**4851**	**30**	**35**	**42**	**4958**	***1%***	**24361**	**38840**	**54109**	**54561**	**55107**
White winegrapes											
Chardonnay	698	102	5	10	814	*1%*	3844	8025	10543	10677	10784
Other white	9	0	1	5	14	*32%*	46	76	154	209	211
Pinot Gris	2	11	16	0	30	*0%*	51	198	355	355	359
Riesling	149	26	0	0	175	*0%*	838	1404	2106	2106	2127
Sauvignon Blanc	6	0	37	5	48	*10%*	31	255	555	614	620
Semillon	29	0	0	0	29	*0%*	147	234	352	352	355
Traminer	15	0	0	0	15	*0%*	75	120	180	180	182
Verdelho	55	8	3	4	70	*6%*	304	654	900	954	964
Viognier	24	0	18	0	41	*0%*	118	288	496	498	503
Total white winegrapes	**988**	**147**	**78**	**24**	**1237**	***2%***	**5453**	**11253**	**15641**	**15945**	**16104**
Total all varieties	**5839**	**177**	**114**	**66**	**6195**	***1%***	**29814**	**50093**	**69750**	**70506**	**71211**

Langhorne Creek Estimated production and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	71	58	92	-79	142	58	92	-8	144	58	0	85
Cabernet Sauvignon	10,061	6,316	11,712	-7,967	22,158	6,449	9,736	5,973	22,380	6,520	5,056	10,805
Grenache	630	899	784	-1,053	1,385	1,095	784	-494	1,399	1,181	735	-517
Malbec	216	62	145	9	443	67	123	254	455	67	123	265
Mataro	37	9	72	-44	74	9	72	-6	75	9	72	-6
Merlot	1,990	1,977	3,393	-3,381	4,477	2,239	3,082	-844	4,522	2,362	1,963	197
Other Red	217	4	327	-115	700	5	349	346	774	5	259	510
Petit Verdot	257	99	172	-14	513	138	172	203	519	138	172	209
Pinot Noir	259	307	525	-573	518	378	378	-238	524	450	378	-305
Ruby Cabernet	0	41	0	-41	0	41	0	-41	0	41	0	-41
Sangiovese	266	51	496	-281	532	51	307	174	537	51	82	404
Shiraz	10,357	4,627	15,484	-9,754	23,165	4,918	14,436	3,811	23,780	4,959	9,045	9,776
Tempranillo	0	0	0	0	0	0	0	0	0	0	0	0
Total red winegrapes	**24,361**	**14,451**	**33,203**	**-23,293**	**54,109**	**15,450**	**29,530**	**9,129**	**55,107**	**15,841**	**17,883**	**21,382**
White winegrapes												
Chardonnay	3,844	1,817	8,062	-6,035	10,543	1,969	6,630	1,944	10,784	1,965	5,829	2,991
Chenin Blanc	0	15	0	-15	0	15	0	-15	0	15	0	-15
Pinot Gris	51	0	135	-84	355	0	221	134	359	0	257	102
Riesling	838	1,470	911	-1,543	2,106	1,470	911	-276	2,127	1,470	911	-255
Sauvignon Blanc	31	360	301	-630	555	654	700	-800	620	654	757	-791
Semillon	147	27	519	-399	352	159	652	-460	355	180	652	-477
Traminer	75	0	0	75	180	0	0	180	182	0	0	182
Verdelho	304	131	631	-458	900	131	661	108	964	131	417	416
Viognier	118	5	209	-96	496	48	300	149	503	91	341	70
Total white winegrapes	**5,453**	**3,825**	**10,768**	**-9,139**	**15,641**	**4,447**	**10,075**	**1,118**	**16,104**	**4,507**	**9,163**	**2,434**
Total all winegrapes	**29,814**	**18,275**	**43,970**	**-32,432**	**69,750**	**19,897**	**39,606**	**10,247**	**71,211**	**20,348**	**27,047**	**23,816**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.022 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

Limestone Coast zone - other

Regional summary report

2007

Limestone Coast zone (other)

Limestone Coast zone (other) includes the vineyards around Bordertown, Mt Benson, Robe, Lucindale, Beachport, Mount Gambier and near but outside the declared GI regions of Padthaway, Coonawarra and Wrattonbully (also referred to as "Limestone Coast zone (other)" in these tables. The total area of vines included in this definition is around 3,000 hectares.

Vintage overview

Overview of vintage statistics

The harvest from Limestone Coast (other) was 14,807 tonnes in 2007, less than 50% of the 2006 harvest of over 30,000 tonnes. The total value of grapes from the region was nearly halved, to less than $14 million – with average purchase values for the major varieties increasing slightly, as a result of the greatly reduced tonnages.

There were only 49 hectares of new plantings in this area in spring 2006 (including top-working and replacements) across these regions – most of which were in Robe.

The estimated production from the Limestone Coast (other) vineyards for 2008 is 24,000 tonnes. The wineries' committed intake is higher than this estimate, so there is not expected to be any surplus fruit. By 2012, the estimated production is 36,000 tonnes, of which 64% (23,000 tonnes) is already under contract or winery grown fruit. This leaves around 13,000 tonnes available on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Limestone Coast zone – other

Winegrape intake summary – vintage 2007

Includes Bordertown (8,802 tonnes), Mount Benson (2,559 tonnes), Limestone Coast zone other (3,064) and Robe (382 tonnes).

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	209			$125,586	$601	72	281	$168,554
Cabernet Sauvignon	2,138	$500	$1,720	$2,039,661	$954	1,910	4,048	$3,861,266
Grenache	0					10	10	$9,132
Malbec	208			$166,175	$798	0	208	$166,175
Mataro	703			$369,023	$525	67	770	$404,355
Merlot	1,899	$800	$1,516	$1,798,010	$947	807	2,706	$2,562,164
Other Red	7			$11,552	$1,650	0	7	$11,552
Petit Verdot	681	$550	$1,490	$482,310	$708	60	741	$524,665
Pinot Noir	82	$500	$1,700	$84,617	$1,030	166	248	$255,364
Shiraz	2,092	$800	$1,850	$2,174,002	$1,039	1,162	3,254	$3,381,932
Tempranillo	0					9	9	$7,767
Total red winegrapes	**8,020**			**$7,250,935**		**4,262**	**12,282**	**$11,352,926**
WHITE								
Chardonnay	347	$300	$1,000	$302,220	$872	968	1,314	$1,145,718
Pinot Gris	34	$1,400	$1,700	$54,131	$1,604	100	134	$214,519
Riesling	0					18	18	$19,686
Sauvignon Blanc	434	$1,000	$2,300	$621,785	$1,433	161	594	$851,837
Semillon	96	$700	$800	$71,239	$740	150	246	$182,451
Verdelho	174	$650	$810	$125,520	$721	0	174	$125,520
Viognier	36			$50,806	$1,408	9	45	$62,772
Total white winegrapes	**1,121**			**$1,225,702**		**1,405**	**2,526**	**$2,602,503**
Total all winegrapes	**9,140**			**$8,476,637**		**5,667**	**14,807**	**$13,955,429**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Limestone Coast zone (other)

Current plantings and projected production 2008 - 2012

Bordertown

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Cabernet Franc	29	0	0	0	29	*0%*	350	350	350	350	350
Cabernet Sauvignon	422	0	0	0	422	*0%*	5068	5068	5068	5068	5068
Malbec	24	0	0	0	24	*0%*	286	286	286	286	286
Mataro (Mourvedre)	42	0	0	0	42	*0%*	509	509	509	509	509
Merlot	242	0	0	0	242	*0%*	2906	2906	2906	2906	2906
Other red	3	0	1	1	5	*19%*	46	56	56	56	56
Petit Verdot	44	0	0	0	44	*0%*	525	525	525	525	525
Shiraz	306	24	0	0	330	*0%*	3886	3957	3957	3957	3957
Chardonnay	95	0	0	0	95	*0%*	1328	1328	1328	1328	1328
Other white	5	0	10	5	19	*27%*	130	200	200	200	200
Semillon	10	0	0	0	10	*0%*	142	142	142	142	142
Verdelho	10	0	0	0	10	*0%*	146	146	146	146	146
Total all varieties	**1233**	**24**	**11**	**6**	**1273**	***0%***	**15321**	**15472**	**15472**	**15472**	**15472**

Mount Benson

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Cabernet Sauvignon	119	0	0	0	119	*0%*	595	1190	1190	1190	1190
Merlot	53	0	0	2	55	*3%*	266	532	543	560	560
Other red	11	0	0	0	11	*0%*	57	115	115	115	115
Shiraz	176	0	0	0	176	*0%*	881	1761	1761	1761	1761
Chardonnay	43	0	0	0	43	*0%*	260	520	520	520	520
Cygne Blanc	22	0	0	4	26	*17%*	131	262	299	353	353
Marsanne	4	0	0	0	4	*0%*	24	49	49	49	49
Pinot Gris	11	0	0	0	11	*0%*	67	134	134	134	134
Riesling	3	0	0	0	3	*0%*	20	40	40	40	40
Sauvignon Blanc	46	12	3	1	63	*2%*	329	729	750	762	762
Semillon	7	0	0	0	7	*0%*	44	88	88	88	88
Verdelho	4	0	0	0	4	*0%*	24	48	48	48	48
Viognier	4	2	0	0	5	*0%*	29	64	64	64	64
Total all varieties	**505**	**14**	**3**	**7**	**529**	***1%***	**2728**	**5533**	**5602**	**5684**	**5684**

Limestone Coast zone (other)

Current plantings and projected production 2008 - 2012

Robe

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Cabernet Sauvignon	214	0	0	0	214	*0%*	856	1926	1926	1926	1926
Malbec	1	0	0	0	1	*0%*	5	11	11	11	11
Merlot	58	0	0	0	58	*0%*	233	524	524	524	524
Petit Verdot	8	0	0	0	8	*0%*	33	73	73	73	73
Pinot Noir	61	0	0	0	61	*0%*	246	553	553	553	553
Shiraz	178	0	0	0	178	*0%*	712	1603	1603	1603	1603
Chardonnay	135	1	1	20	157	*13%*	679	1369	1513	1713	1713
Pinot Gris	4	0	9	4	17	*22%*	18	102	156	192	192
Sauvignon Blanc	11	4	11	12	38	*32%*	69	226	344	467	467
Semillon	17	0	0	0	17	*0%*	85	170	170	170	170
Total all varieties	**688**	**5**	**21**	**36**	**750**	***5%***	**2935**	**6557**	**6872**	**7231**	**7231**

Limestone Coast zone - other

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Cabernet Franc	2	0	0	0	2	*0%*	8	17	17	17	17
Cabernet Sauvignon	322	0	0	0	322	*0%*	1611	3221	3221	3221	3221
Merlot	36	0	0	0	36	*0%*	179	358	358	358	358
Petit Verdot	3	0	0	0	3	*0%*	17	34	34	34	34
Pinot Noir	78	0	0	0	78	*0%*	391	782	782	782	782
Shiraz	112	11	0	0	122	*0%*	596	1347	1347	1347	1347
Chardonnay	62	9	0	0	72	*0%*	414	861	861	861	861
Other white	5	1	0	0	6	*0%*	38	80	80	80	80
Sauvignon Blanc	17	0	46	0	63	*0%*	103	591	757	757	757
Total all varieties	**637**	**22**	**46**	**0**	**705**	***0%***	**3356**	**7293**	**7459**	**7459**	**7459**
Total LS Coast zone - other	**3063**	**64**	**82**	**49**	**3258**	***2%***	**24340**	**34854**	**35405**	**35846**	**35846**

Limestone Coast zone (other)

Estimated production and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	373	83	413	-124	396	83	413	-101	396	7	413	-24
Cabernet Sauvignon	8,130	3,130	5,143	-144	11,406	3,110	3,068	5,227	11,406	3,235	3,020	5,151
Grenache	9	0	0	9	17	0	0	17	17	0	0	17
Malbec	290	2	82	207	296	4	82	211	296	5	82	210
Mataro	509	77	643	-210	509	77	643	-210	509	77	643	-210
Merlot	3,584	1,242	3,148	-807	4,331	1,270	2,670	392	4,347	1,270	2,617	461
Other Red	46	0	20	26	56	0	20	35	56	0	20	35
Petit Verdot	600	89	615	-104	683	96	617	-30	683	113	617	-47
Pinot Noir	646	401	586	-341	1,353	407	479	467	1,353	407	263	683
Shiraz	6,075	1,668	4,001	406	8,668	1,668	3,722	3,278	8,668	1,668	3,737	3,263
Tempranillo	0	23	0	-23	0	23	0	-23	0	23	0	-23
Total red winegrapes	**20,261**	**6,715**	**14,651**	**-1,105**	**27,715**	**6,738**	**11,715**	**9,262**	**27,731**	**6,805**	**11,411**	**9,515**
White winegrapes												
Chardonnay	2,680	1,955	889	-163	4,222	2,094	682	1,445	4,422	2,115	619	1,687
Pinot Gris	98	112	98	-112	321	138	94	90	358	138	20	200
Riesling	38	22	10	5	75	33	10	33	75	33	10	33
Sauvignon Blanc	501	342	539	-380	1,851	388	312	1,151	1,986	403	271	1,311
Semillon	271	219	197	-145	400	219	218	-37	400	219	218	-37
Verdelho	170	0	164	5	194	0	169	24	194	0	174	19
Viognier	36	29	57	-49	78	51	57	-30	78	51	57	-30
Total white winegrapes	**4,079**	**2,679**	**1,954**	**-553**	**7,690**	**2,922**	**1,543**	**3,225**	**8,114**	**2,958**	**1,371**	**3,786**
Total all winegrapes	**24,340**	**9,394**	**16,605**	**-1,659**	**35,405**	**9,659**	**13,258**	**12,487**	**35,846**	**9,763**	**12,781**	**13,301**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.020 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

McLaren Vale wine region

Regional summary report

2007

McLaren Vale

Vintage overview

Vintage report

A dry winter, followed by a dry spring, saw a reduction in rainfall recorded to less than half the long-term average. This resulted in low soil moisture levels at budburst. Shoot growth was reduced and irrigation began in many vineyards much earlier than over the last few seasons.

The dry season had McLaren Vale's irrigation water supplies pushed to the limit. The district's large-scale water recycling, with 40% of the region accessing reclaimed water from the suburbs of Adelaide, proved highly valuable. However even with this extra water available growing conditions were the toughest in recent memory.

Weather conditions were also unusually cold during spring with night-time temperatures getting close to freezing during September and October. Fortunately only isolated patches of frost damage were seen.

Summer was mild with good weather and no significant disease issues. The only rain that fell came in late January with 40-50mm falling in a thunderstorm. This caused berry splitting which further reduced the harvest. No further rain fell to interfere with ripening, and botrytis and other bunch rots were not an issue.

With the drought conditions and low yields ripening was early and many vineyards were harvested two weeks earlier than 2006. Harvest began in the middle of February. The harvested tonnage in McLaren Vale was greatly affected by the drought conditions. Picking was rapid with most wineries giving staff the Easter Holidays off. All fruit was into the wineries by the middle of April.

James Hook
McLaren Vale Grape, Wine and Tourism Association

Overview of vintage statistics

The harvest from McLaren Vale was 35,293 tonnes in 2007, compared with over 63,000 tonnes in 2006. The estimated total value of the grapes decreased from $69 million to $46 million, a substantial reduction in income, but less than the loss in volume. Average purchase values for most of the major varieties increased, with Shiraz and Cabernet Sauvignon both up by around $200 per tonne.

New plantings in McLaren Vale in spring 2006 (including top-working and replacements) amounted to 77 hectares (approximately 1% of the total area) – mostly in Shiraz. While this is a very small amount, it is higher than the previous year, and there is no indication of any significant removal of grapevines being undertaken in the region.

The estimated production from McLaren Vale for 2008 is around 66,000 tonnes (assuming reasonable spring rainfall). 48,000 tonnes is already committed to the wineries, leaving around 17,000 tonnes uncontracted. Any uncontracted fruit is likely to be in demand, as shortfalls are predicted across the state, due to water restrictions and the after-effects of drought and frost in other regions (see State Summary section).

By 2012, the estimated production is 70,000 tonnes, of which 57% (40,000 tonnes) is already under contract or winery grown fruit. This proportion is low compared with most other regions, and leaves an estimated 30,000 tonnes – more than one third of production - to be sold on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

McLaren Vale

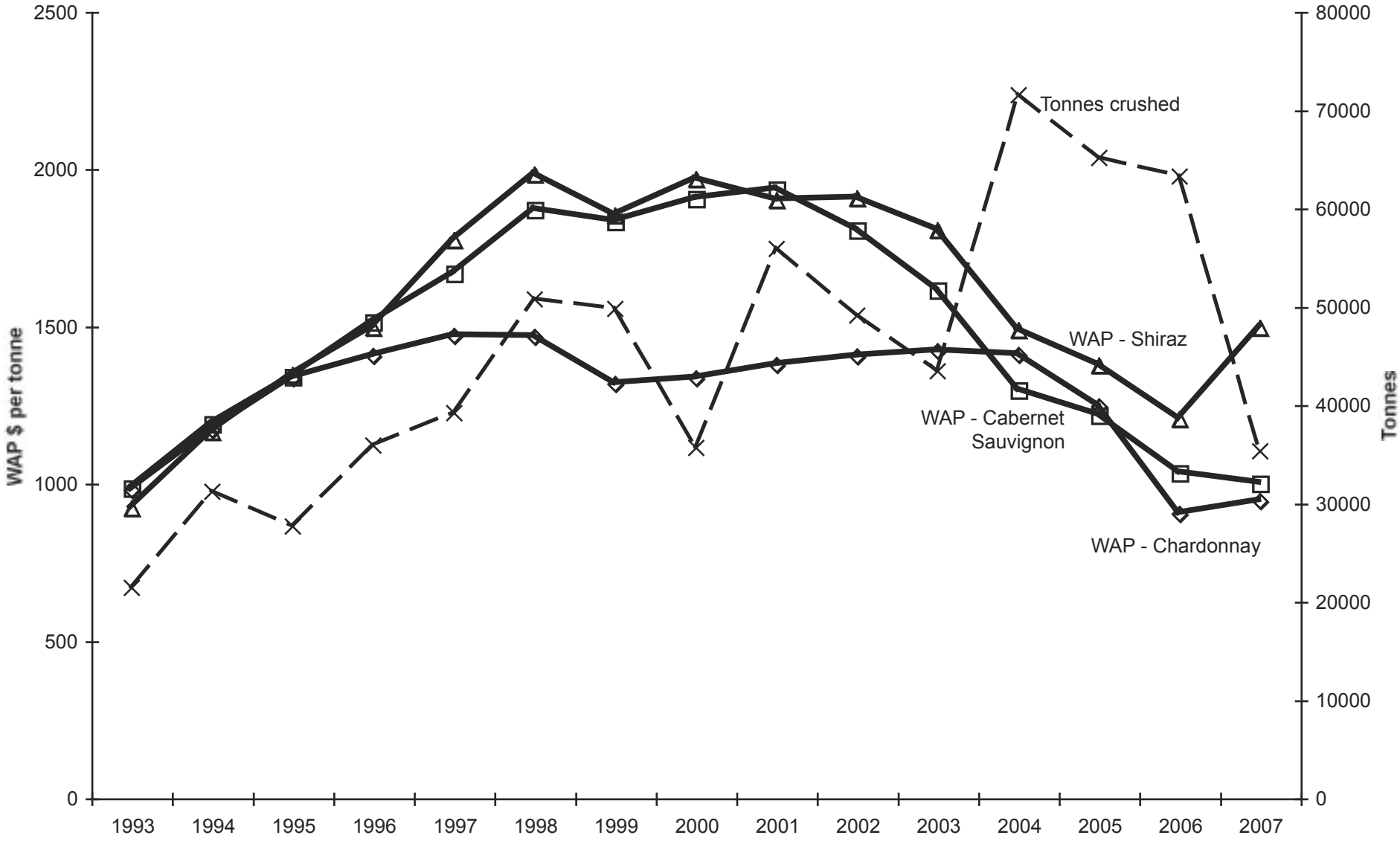
Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	29	$600	$2,000	$29,447	$1,001	42	71	$71,178
Cabernet Sauvignon	3,218	$350	$5,000	$4,027,043	$1,251	1,775	4,993	$6,247,930
Grenache	1,293	$600	$3,000	$1,650,664	$1,276	843	2,136	$2,726,037
Malbec	3			$3,070	$1,228	23	26	$31,412
Mataro	15	$1,200	$2,300	$26,555	$1,759	133	148	$260,520
Merlot	1,472	$600	$1,680	$1,583,204	$1,075	745	2,217	$2,384,453
Other Red	20	$600	$2,000	$29,574	$1,510	201	220	$332,972
Petit Verdot	248	$550	$1,500	$286,624	$1,154	228	476	$549,827
Pinot Noir	514	$500	$1,804	$632,742	$1,230	79	594	$730,427
Ruby Cabernet	0					6	6	$8,980
Sangiovese	55	$950	$1,800	$75,866	$1,375	159	214	$294,799
Shiraz	10,777	$100	$7,104	$16,115,326	$1,495	4,499	15,276	$22,842,370
Tempranillo	22	$800	$1,800	$32,006	$1,424	74	96	$136,666
Total red winegrapes	**17,668**			**$24,492,121**		**8,806**	**26,474**	**$36,617,572**
RED								
Chardonnay	4,434	$600	$2,000	$4,187,714	$944	1,596	6,030	$5,695,387
Chenin Blanc	14			$12,337	$881	30	44	$38,421
Colombard	16			$16,312	$1020	0	16	$16,312
Other White	100	$650	$5,300	$175,721	$1,765	114	213	$376,258
Pinot Gris	28			$27,980	$999	55	83	$83,415
Riesling	311	$700	$1,500	$304,278	$978	185	496	$485,195
Sauvignon Blanc	451	$600	$1,900	$618,831	$1,371	234	686	$940,084
Semillon	524	$450	$1,778	$453,003	$865	330	854	$738,071
Traminer	20			$16,290	$819	0	20	$16,290
Verdelho	32			$45,574	$1,422	49	81	$115,683
Viognier	178	$1,800	$2,000	$329,091	$1,846	118	296	$546,368
Total white winegrapes	**6,108**			**$6,187,130**		**2,711**	**8,819**	**$9,051,485**
Total all winegrapes	**23,776**			**$30,679,251**		**11,517**	**35,293**	**$45,669,057**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

McLaren Vale

Historical WAP vs tonnes crushed



McLaren Vale

Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Barbera	8	0	1	0	9	*0%*	74	78	78	82	82
Cabernet Franc	24	0	0	0	24	*0%*	212	212	212	222	222
Cabernet Sauvignon	1311	5	0	5	1321	*0%*	10526	10545	10572	11101	11101
Grenache	416	1	0	2	419	*0%*	3757	3766	3780	3969	3969
Mataro (Mouvedre)	23	1	1	5	30	*17%*	219	245	278	291	291
Merlot	315	2	0	0	317	*0%*	2849	2849	2849	2992	2992
Nebbiolo	48	0	0	0	49	*0%*	437	438	438	460	460
Other red	20	6	2	0	28	*0%*	243	252	252	265	265
Petit Verdot	66	0	0	1	67	*2%*	593	600	613	643	643
Pinot Noir	81	0	0	0	81	*0%*	729	729	729	766	766
Sangiovese	43	3	4	0	49	*0%*	424	440	440	462	462
Shiraz	3378	31	22	39	3471	*1%*	30785	31059	31325	32891	32891
Tempranillo	22	2	1	0	25	*0%*	220	225	225	236	236
Total red winegrapes	**5755**	**50**	**31**	**52**	**5888**	***1%***	**51070**	**51439**	**51791**	**54381**	**54381**
White winegrapes											
Chardonnay	680	47	5	3	735	*0%*	8756	8805	8842	9284	9284
Chenin Blanc	17	0	0	2	20	*11%*	208	221	247	260	260
Marsanne	14	0	0	0	14	*2%*	163	165	168	176	176
Other white	11	1	1	1	14	*9%*	148	162	178	186	186
Pinot Gris	1	1	10	4	16	*27%*	79	162	200	210	210
Riesling	78	0	1	0	79	*0%*	942	948	948	996	996
Roussanne	9	1	0	0	10	*0%*	126	126	126	132	132
Sauvignon Blanc	109	8	3	7	128	*6%*	1672	1745	1824	1915	1915
Semillon	126	0	0	0	126	*0%*	1507	1507	1507	1583	1583
Verdelho	21	0	0	0	21	*2%*	249	252	257	269	269
Viognier	48	10	12	6	76	*8%*	766	872	927	973	973
Total white winegrapes	**1114**	**69**	**32**	**25**	**1239**	***2%***	**14617**	**14965**	**15223**	**15984**	**15984**
Rootstock Block	1	0	0	0	1	*0%*					
Total all varieties	**6870**	**119**	**62**	**77**	**7128**	***1%***	**65687**	**66404**	**67014**	**70365**	**70365**

McLaren Vale

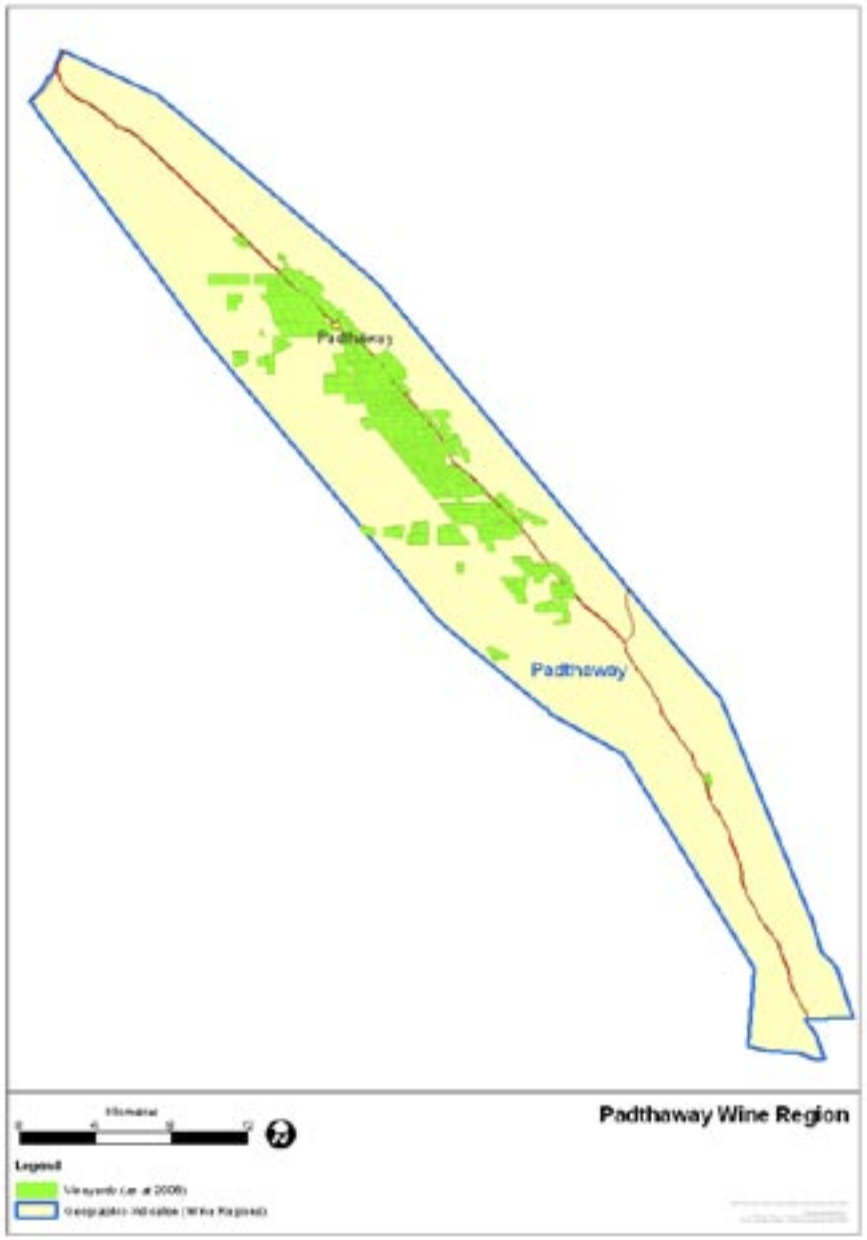
Estimated production and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	212	80	28	104	212	102	28	82	222	102	28	93
Cabernet Sauvignon	10,526	4,083	3,784	2,660	10,572	4,280	2,918	3,374	11,101	4,305	1,850	4,946
Grenache	3,757	1,630	1,264	863	3,780	1,701	1,134	946	3,969	1,757	937	1,276
Malbec	0	36	3	-39	0	25	3	-28	0	25	3	-28
Mataro	219	153	30	36	278	153	30	95	291	153	24	114
Merlot	2,849	1,271	987	591	2,849	1,312	802	735	2,992	1,330	614	1,048
Other Red	754	284	22	448	768	290	22	456	806	290	22	494
Petit Verdot	593	238	242	114	613	282	136	195	643	282	88	273
Pinot Noir	729	147	407	176	729	160	379	190	766	166	273	327
Ruby Cabernet	0	17	0	-17	0	0	0	0	0	0	0	0
Sangiovese	424	178	92	155	440	176	97	168	462	176	64	223
Shiraz	30,785	9,152	14,279	7,354	31,325	9,737	11,325	10,263	32,891	9,868	9,290	13,733
Tempranillo	220	151	36	33	225	150	24	51	236	151	24	61
Total red winegrapes	**51,070**	**17,419**	**21,173**	**12,478**	**51,791**	**18,368**	**16,898**	**16,525**	**54,381**	**18,604**	**13,216**	**22,560**
White winegrapes												
Chardonnay	8,756	2,917	2,837	3,002	8,842	3,022	2,154	3,666	9,284	3,063	1,458	4,764
Chenin Blanc	208	63	0	145	247	76	0	171	260	76	0	184
Colombard	0	0	0	0	0	0	0	0	0	0	0	0
Other White	436	183	159	94	471	185	141	145	495	185	141	169
Pinot Gris	79	140	0	-61	200	155	0	45	210	164	0	46
Riesling	942	268	494	180	948	312	474	163	996	312	317	367
Sauvignon Blanc	1,672	475	590	607	1,824	533	560	731	1,915	559	394	962
Semillon	1,507	466	486	555	1,507	489	393	625	1,583	507	272	804
Traminer	0	0	10	-10	0	0	0	0	0	0	0	0
Verdelho	249	169	75	5	257	169	75	12	269	169	53	47
Viognier	766	183	220	363	927	193	221	512	973	194	221	557
Total white winegrapes	**14,617**	**4,866**	**4,871**	**4,880**	**15,223**	**5,134**	**4,019**	**6,070**	**15,984**	**5,229**	**2,856**	**7,900**
Total all winegrapes	**65,687**	**22,285**	**26,044**	**17,357**	**67,014**	**23,501**	**20,917**	**22,595**	**70,365**	**23,833**	**16,072**	**30,460**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.105 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*



Padthaway wine region

Regional summary report

2007

Padthaway

Vintage overview

Vintage report

The 2006/07 season was extremely difficult in that rainfall was exceedingly low, temperatures were high and spring frosts dramatically impacted on production. However, there were some outstanding parcels of fruit harvested from the 2007 vintage.

A very good bud burst occurred that was slightly earlier than the last few seasons. However, then the frosts arrived and did significant damage. A considerable number of damaging frosts were recorded throughout the Limestone Coast in spring. In Padthaway damaging frosts were experienced on at least three occasions during October, and these resulted in significant crop loss to most growers throughout the district and for some virtually total crop loss. Production for Padthaway ultimately was reduced by some 40% - 50% of long term average as a consequence of these frosts.

Rainfall registrations from late May until mid-January were less than 30% of long- term average. There was a good rainfall event in mid-January; then it remained relatively dry right through the vintage and up until the start of the 2007 growing season.

Compared with the long-term average, the season was warmer than normal with the heat summation of 1837 degree days being almost 20% above the average of the last 20 years.

Vintage commenced in early February. As it progressed, conditions were relatively warm to mild and dry, conditions that were ideal for the ripening crop. Vintage was completed for most growers in mid-March, far earlier than normal. The quality of both white and red varieties was very good, with Chardonnay and Shiraz being the highlights.

Graham Kaye
President, Padthaway Grape Growers Association

Overview of vintage statistics

The harvest from Padthaway was 23,787 tonnes – barely half of the 2006 harvest. The total value of grapes from the region also decreased, but only by one third, from $38 million to $24 million, indicating an increase in average prices as a result of the low crop. The average purchase value for Shiraz and Cabernet Sauvignon were both up by around $200 per tonne.

There was very little new planting in Padthaway in spring 2006. Most of the new planting was in Pinot Gris (13 hectares). This can include top-working or replacement as well as additional area.

The estimated production from the Padthaway region for 2008 is 27,000 tonnes, as a result of the continuing dry conditions and after-effects of the severe frosts in the 2006-07 season. The wineries' committed intake is well above this estimate, so there is not expected to be any surplus fruit. By 2012, assuming a return to normal growing conditions, the estimated production is 44,000 tonnes, of which 70% (31,000 tonnes) is already under contract or winery grown fruit. This leaves around 13,000 tonnes (30% of estimated production) available on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Padthaway

Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	0					44	44	$48,105
Cabernet Sauvignon	2,448	$800	$1,700	$2,478,396	$1,012	2,307	4,755	$4,813,928
Malbec	34			$33,680	$1,000	44	77	$77,270
Merlot	158			$155,809	$989	906	1,063	$1,051,688
Petit Verdot	0					16	16	$17,602
Pinot Noir	0					646	646	$703,270
Shiraz	2,827	$500	$3,000	$3,282,551	$1,161	3,569	6,395	$7,426,365
Total red winegrapes	**5,466**			**$5,950,437**		**7,531**	**12,998**	**$14,138,227**
WHITE								
Chardonnay	2,905	$600	$1,500	$2,612,520	$899	4,113	7,018	$6,312,307
Other White	0					64	64	$60,124
Pinot Gris	235			$234,670	$1,000	119	354	$353,775
Riesling	233			$232,610	$1,000	1,562	1,794	$1,794,190
Sauvignon Blanc	445	$1,000	$2,200	$519,782	$1,168	251	696	$812,614
Semillon	0					266	266	$247,780
Traminer	182			$126,406	$694	80	263	$182,202
Verdelho	0					236	236	$219,962
Viognier	69			$69,490	$1,000	30	100	$99,560
Total white winegrapes	**4,069**			**$3,795,478**		**6,721**	**10,790**	**$10,082,515**
Total all winegrapes	**9,535**			**$9,745,915**		**14,253**	**23,787**	**$24,220,742**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Padthaway

Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Franc	11	0	0	0	11	*0%*	68	102	124	124	124
Cabernet Sauvignon	819	0	0	3	822	*0%*	4916	7382	8223	8223	8223
Malbec	19	0	0	0	19	*0%*	112	169	187	187	187
Merlot	185	0	12	0	198	*0%*	1134	1746	1977	1977	1977
Meunier (Pinot Meunier)	1	0	0	0	1	*0%*	4	5	6	6	6
Petit Verdot	2	0	0	0	2	*0%*	14	20	23	23	23
Pinot Noir	92	0	9	0	101	*0%*	569	887	1013	1013	1013
Sangiovese	4	0	0	0	4	*0%*	25	37	41	41	41
Shiraz	1114	28	18	0	1159	*0%*	7971	10387	12754	12754	12754
Total red winegrapes	**2247**	**28**	**40**	**3**	**2318**	***0%***	**14811**	**20734**	**24348**	**24348**	**24348**
White winegrapes											
Arneis	0	0	0	0	0	*0%*	2	3	3	3	3
Chardonnay	1032	54	15	0	1101	*0%*	8594	10965	13211	13211	13211
Muscat Blanc (Frontignac)	12	0	0	0	12	*0%*	85	122	134	134	134
Pinot Gris	6	32	1	13	51	*25%*	198	422	544	544	544
Riesling	302	0	0	0	302	*0%*	2111	3015	3317	3317	3317
Sauvignon Blanc	65	18	0	3	86	*4%*	541	838	1034	1034	1034
Semillon	46	0	0	0	46	*0%*	321	458	550	550	550
Traminer	39	0	0	0	39	*0%*	273	390	468	468	468
Verdelho	34	0	0	0	34	*0%*	241	344	413	413	413
Viognier	19	0	4	0	23	*0%*	143	219	254	254	254
Total white winegrapes	**1555**	**104**	**20**	**16**	**1695**	***1%***	**12509**	**16776**	**19927**	**19927**	**19927**
Total all varieties	**3802**	**132**	**60**	**19**	**4013**	***0%***	**27320**	**37510**	**44275**	**44275**	**44275**

Padthaway

Estimated production and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	68	135	0	-67	124	130	0	-5	124	130	0	-5
Cabernet Sauvignon	4,916	3,900	1,923	-908	8,223	3,763	1,092	3,368	8,223	3,752	728	3,742
Malbec	112	79	159	-125	187	74	159	-45	187	79	159	-50
Merlot	1,134	1,467	267	-601	1,977	1,512	188	277	1,977	1,512	113	351
Petit Verdot	14	28	0	-14	23	0	0	23	23	0	0	23
Pinot Noir	569	1,025	0	-456	1,013	1,026	0	-12	1,013	1,026	0	-12
Sangiovese	25	0	50	-26	41	0	50	-9	41	0	0	41
Shiraz	7,971	5,957	3,980	-1,967	12,754	5,468	2,710	4,576	12,754	5,456	1,618	5,681
Total red winegrapes	**14,811**	**12,590**	**6,380**	**-4,159**	**24,348**	**11,972**	**4,199**	**8,177**	**24,348**	**11,954**	**2,618**	**9,775**
White winegrapes												
Chardonnay	8,594	7,709	2,439	-1,554	13,211	7,582	1,660	3,969	13,211	7,582	1,407	4,222
Other White	87	2	0	85	137	2	0	135	137	154	0	-17
Pinot Gris	198	268	337	-407	544	340	1,606	-1,402	544	378	1,895	-1,730
Riesling	2,111	2,933	236	-1,058	3,317	2,877	236	204	3,317	2,877	236	204
Sauvignon Blanc	541	531	327	-317	1,034	506	402	126	1,034	495	400	138
Semillon	321	487	0	-167	550	487	0	62	550	487	0	62
Traminer	273	334	165	-226	468	334	165	-31	468	334	165	-31
Verdelho	241	349	0	-108	413	323	0	90	413	323	0	90
Viognier	143	38	209	-104	254	44	209	1	254	44	97	113
Total white winegrapes	**12,509**	**12,651**	**3,713**	**-3,854**	**19,927**	**12,495**	**4,279**	**3,153**	**19,927**	**12,675**	**4,199**	**3,053**
Total all winegrapes	**27,320**	**25,241**	**10,093**	**-8,014**	**44,275**	**24,466**	**8,478**	**11,330**	**44,275**	**24,630**	**6,817**	**12,828**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

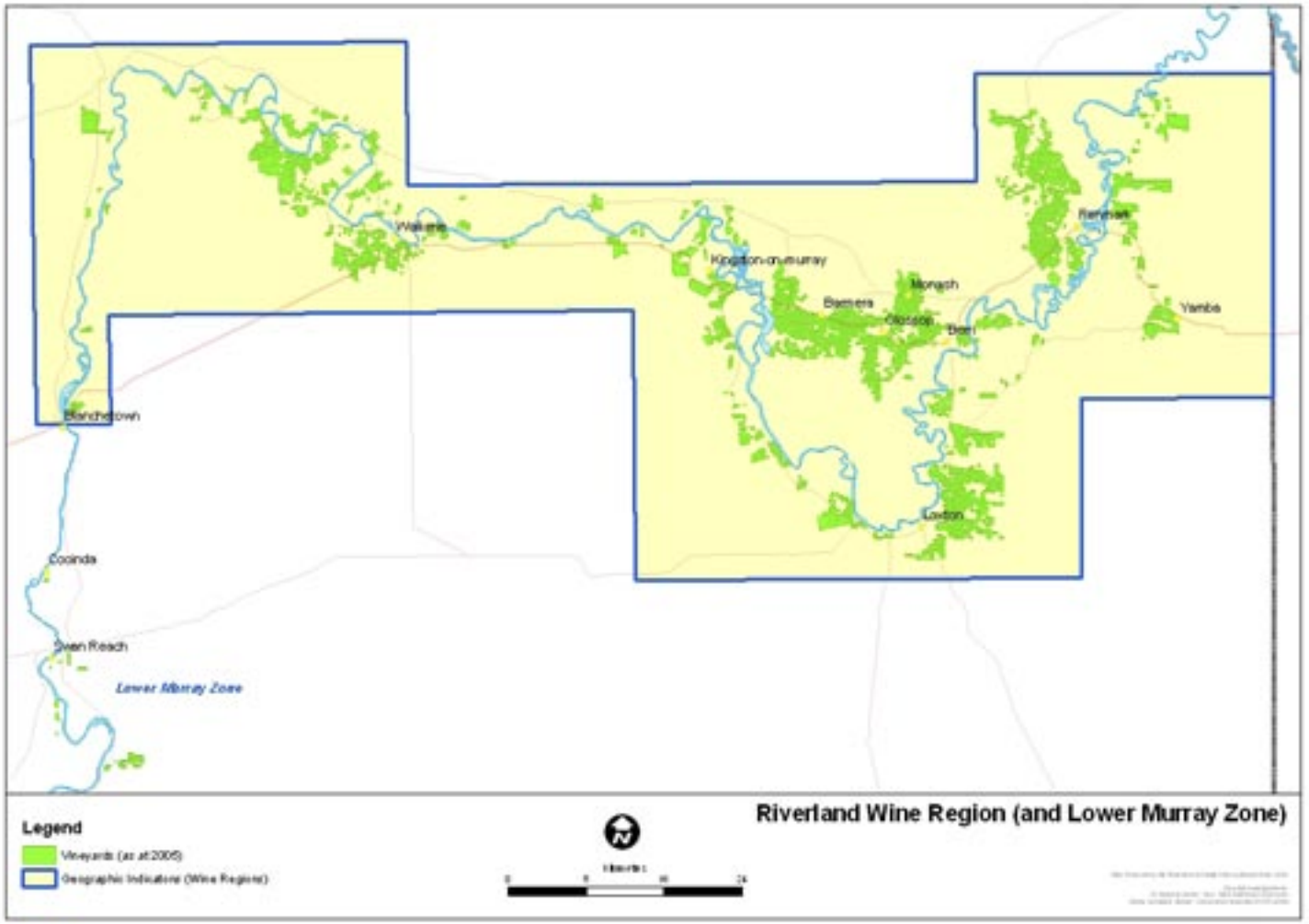
[2] *A raising factor of 1.020 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

2007

Riverland wine region

Regional summary report 2007



Riverland

Vintage overview

Vintage report

2007 was a year of challenges, with low water allocations, frosts, dry spring and early budburst - all of which combined to produce one of the lowest vintages for some time.

Winter and spring were very dry, which caused an early budburst and – together with the frosty weather –some headaches for growers, although damage was confined to known frost pockets. The low water allocation meant growers had to manage water very carefully and it was difficult to make up for the low winter and spring rainfall.

Harvest started in January and the heavens opened with 60 - 70mm of rain, which reduced some crops by splitting berries, but good weather allowed the split to dry up and not go rotten. The low crops and good weather that followed allowed a smooth intake that had one of the earliest finishes for a long time.

Due to a combination of low bunch numbers and water restrictions, crops were down by about 25% for whites and 35% for reds.

Jim Caddy
Phylloxera and Grape Industry Board

Overview of vintage statistics

The harvest from the Riverland was 323,171 tonnes in 2006, around 30% below the 2006 harvest. The total value of purchased grapes also decreased by 30% - from $175 million to $124 million – a drop of over $50 million in income to growers in the region. The average purchase value for Shiraz and Chardonnay decreased slightly, while Cabernet Sauvignon increased from $324 per tonne to $399 per tonne.

There were 344 hectares of new plantings in the Riverland in spring 2006 (including top-working and replacements) compared with 509 hectares in the previous year. Most of the new plantings were in Muscat Gordo Blanco, Shiraz and Sauvignon Blanc.

The estimated production from the Riverland for 2008 is 325,000 tonnes (this estimate assumes a water allocation of 40% for irrigators in the region). This is well below the wineries' committed intake of around 421,000 tonnes, so there are likely to be significant shortfalls.

By 2012, assuming a return to normal water allocations and growing conditions, the estimated production is 516,000 tonnes, of which 69% (360,000 tonnes) is already under contract or winery grown fruit. This leaves an estimated 158,000 tonnes to be sold on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Riverland

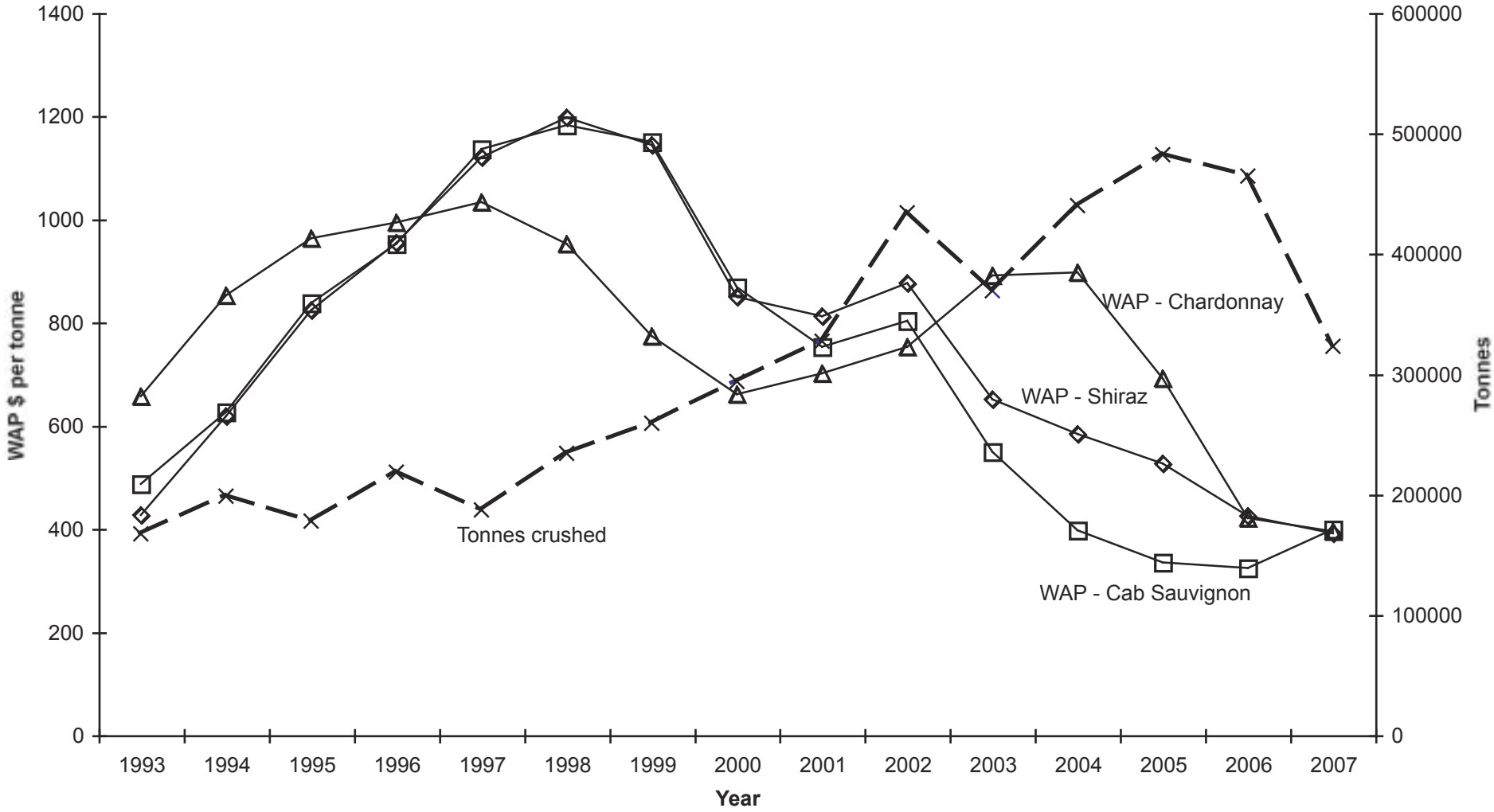
Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Franc	49			$14,560	$297	24	73	$21,765
Cabernet Sauvignon	39,243	$250	$650	$15,645,276	$399	4,201	43,443	$17,320,001
Grenache	5,820	$100	$525	$1,747,211	$300	566	6,386	$1,917,108
Malbec	220			$64,744	$294	86	306	$90,036
Mataro	2,635	$100	$881	$887,119	$337	1	2,636	$887,456
Merlot	12,927	$225	$650	$5,126,264	$397	3,030	15,957	$6,327,884
Other Red	613	$150	$600	$235,679	$384	244	858	$329,578
Petit Verdot	5,779	$225	$650	$1,862,472	$322	1,476	7,255	$2,338,162
Pinot Noir	4,960	$300	$900	$2,739,479	$552	201	5,161	$2,850,500
Ruby Cabernet	2,792	$169	$650	$791,377	$283	607	3,398	$963,337
Sangiovese	177	$195	$425	$39,278	$222	118	295	$65,537
Shiraz	62,685	$195	$750	$24,478,848	$391	5,233	67,918	$26,522,199
Tempranillo	245	$295	$425	$74,530	$305	10	255	$77,700
Total red winegrapes	**138,144**			**$53,706,836**		**15,797**	**153,941**	**$59,711,262**
WHITE								
Chardonnay	88,849	$175	$850	$35,088,830	$395	7,389	96,239	$38,007,029
Chenin Blanc	2,503	$175	$385	$727,103	$291	357	2,860	$830,709
Colombard	22,181	$200	$400	$6,695,990	$302	1,325	23,506	$7,096,079
Muscat Gordo Blanco	18,431	$240	$470	$6,858,311	$372	291	18,722	$6,966,499
Other White	2,921	$175	$1,000	$1,024,064	$351	1,784	4,705	$1,649,480
Pinot Gris	90			$49,708	$552	0	90	$49,708
Riesling	3,302	$250	$414	$1,259,607	$381	725	4,027	$1,536,069
Sauvignon Blanc	2,925	$300	$650	$1,740,926	$595	1,893	4,817	$2,867,533
Semillon	4,334	$200	$550	$1,588,315	$366	3,513	7,847	$2,875,842
Sultana	908	$100	$325	$222,730	$245	0	908	$222,730
Traminer	1,206	$400	$514	$523,136	$434	922	2,128	$923,204
Verdelho	1,491	$250	$454	$513,555	$345	463	1,954	$673,213
Viognier	1,112	$350	$1,700	$801,149	$720	315	1,427	$1,027,974
Total white winegrapes	**150,253**			**$57,093,423**		**18,977**	**169,229**	**$64,726,069**
Total all winegrapes	**288,397**			**$110,800,259**		**34,774**	**323,171**	**$124,437,332**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Riverland

Historical WAP vs tonnes crushed



Riverland

Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Sauvignon	3345	5	2	22	3374	*1%*	40211	47083	67593	67759	67759
Grenache	438	2	1	0	441	*0%*	5284	6173	13227	13227	13227
Malbec	39	0	0	0	39	*0%*	467	545	974	974	974
Mataro (Mourvedre)	347	0	0	0	347	*0%*	4170	4864	8687	8687	8687
Merlot	1176	15	6	10	1206	*1%*	17898	19221	25390	25471	25471
Other red	111	1	4	1	117	*1%*	1367	1630	2467	2479	2479
Petit Verdot	599	0	0	0	599	*0%*	7192	8390	14983	14983	14983
Pinot Noir	223	11	8	4	247	*2%*	2862	3424	5199	5230	5230
Ruby Cabernet	360	0	4	0	364	*0%*	4342	5094	9096	9096	9096
Sangiovese	22	0	0	0	22	*0%*	266	313	469	469	469
Shiraz	5184	164	130	44	5522	*1%*	64954	88003	121737	122104	122104
Tempranillo	27	0	0	0	27	*0%*	326	381	571	571	571
Total red winegrapes	**11871**	**198**	**155**	**82**	**12307**	***1%***	**149340**	**185120**	**270393**	**271050**	**271050**
White winegrapes											
Chardonnay	4246	394	201	50	4892	*1%*	90080	107066	122609	123080	123080
Chenin Blanc	159	0	0	0	159	*0%*	3030	3030	3987	3987	3987
Colombard	942	10	11	9	972	*1%*	22993	25165	29242	29345	29345
Doradillo	138	0	0	0	138	*0%*	2630	2630	3460	3460	3460
Muscat Blanc (Frontignac)	61	5	7	26	99	*26%*	1327	1638	2639	2881	2881
Muscat Gordo Blanco	1045	18	55	83	1202	*7%*	21815	27838	34227	35102	35102
Other white	167	0	1	4	172	*2%*	3016	3056	4316	4351	4351
Pinot Gris	0	0	6	15	21	*71%*	31	204	371	454	454
Riesling	237	10	0	6	254	*2%*	4461	5022	5627	5679	5679
Sauvignon Blanc	175	36	12	47	269	*17%*	4116	4922	7029	7467	7467
Semillon	365	10	3	4	381	*1%*	9024	9111	10708	10747	10747
Sultana	398	0	2	1	401	*0%*	7986	8013	10033	10041	10041
Traminer	109	1	4	0	114	*0%*	2232	2273	2842	2842	2842
Trebbiano	29	0	0	0	29	*0%*	573	573	717	717	717
Verdelho	115	1	1	0	117	*0%*	2342	2350	2937	2937	2937
Viognier	71	9	28	16	125	*13%*	945	1751	1932	2022	2022
Total white winegrapes	**8259**	**495**	**331**	**261**	**9346**	***3%***	**176600**	**204641**	**242675**	**245113**	**245113**
Rootstock Block	33	3	12	0	48	*0%*					
Multi-purpose	134	5	11	0	153	*0%*					
Tablegrapes	65	0	0	0	65	*1%*					
Total all varieties	**20361**	**702**	**509**	**344**	**21916**	***2%***	**325940**	**389761**	**513068**	**516163**	**516163**

Riverland

Estimated supply and fruit availability 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Franc	0	25	57	-82	0	25	57	-82	0	25	57	-82
Cabernet Sauvignon	40,211	7,028	49,006	-15,823	67,593	7,411	44,934	15,248	67,759	7,952	40,897	18,910
Grenache	5,284	540	6,293	-1,550	13,227	561	5,563	7,104	13,227	561	4,646	8,021
Malbec	467	170	322	-25	974	170	322	482	974	170	322	482
Mataro	4,170	0	4,155	15	8,687	0	2,975	5,711	8,687	0	2,366	6,321
Merlot	17,898	6,536	16,392	-5,030	25,390	6,687	13,551	5,152	25,471	6,946	10,891	7,634
Other Red	1,367	403	778	186	2,467	486	753	1,229	2,479	490	518	1,470
Petit Verdot	7,192	4,244	5,836	-2,888	14,983	4,244	4,495	6,244	14,983	4,244	3,597	7,142
Pinot Noir	2,862	303	6,116	-3,557	5,199	303	6,346	-1,450	5,230	303	6,602	-1,674
Ruby Cabernet	4,342	822	2,785	735	9,096	974	1,664	6,458	9,096	974	1,625	6,497
Sangiovese	266	238	167	-139	469	198	202	69	469	198	202	69
Shiraz	64,954	11,994	87,395	-34,435	121,737	13,276	79,339	29,122	122,104	13,498	70,703	37,903
Tempranillo	326	21	234	71	571	26	234	311	571	26	10	535
Total red winegrapes	**149,340**	**32,325**	**179,536**	**-62,522**	**270,393**	**34,361**	**160,435**	**75,597**	**271,050**	**35,387**	**142,436**	**93,227**
White winegrapes												
Chardonnay	90,080	11,276	99,365	-20,561	122,609	12,314	88,600	21,695	123,080	12,905	74,844	35,331
Chenin Blanc	3,030	334	3,298	-602	3,987	284	2,785	918	3,987	284	2,268	1,436
Colombard	22,993	1,781	32,207	-10,995	29,242	2,084	28,960	-1,802	29,345	2,125	27,375	-156
Muscat Gordo Blanco	21,815	753	24,333	-3,271	34,227	2,672	22,963	8,593	35,102	3,064	18,421	13,618
Other White	7,546	1,541	4,205	1,800	11,132	1,490	5,047	4,595	11,409	1,584	4,551	5,274
Pinot Gris	31	0	311	-280	371	64	514	-207	454	223	615	-384
Riesling	4,461	755	3,561	145	5,627	755	3,548	1,325	5,679	915	3,373	1,391
Sauvignon Blanc	4,116	2,229	5,474	-3,588	7,029	2,382	9,111	-4,464	7,467	2,804	8,614	-3,951
Semillon	9,024	4,522	5,428	-926	10,708	4,573	5,141	994	10,747	4,629	4,642	1,476
Sultana	7,986	15	2,468	5,503	10,033	15	1,863	8,155	10,041	15	1,622	8,404
Traminer	2,232	1,052	997	183	2,842	1,052	1,015	775	2,842	1,054	948	840
Verdelho	2,342	919	1,411	11	2,937	919	836	1,181	2,937	919	625	1,392
Viognier	945	349	1,721	-1,125	1,932	369	2,148	-585	2,022	437	1,873	-288
Total white winegrapes	**176,600**	**25,525**	**184,781**	**-33,706**	**242,675**	**28,972**	**172,530**	**41,173**	**245,113**	**30,960**	**149,771**	**64,383**
Total all winegrapes	**325,940**	**57,850**	**364,317**	**-96,227**	**513,068**	**63,332**	**332,966**	**116,770**	**516,163**	**66,347**	**292,207**	**157,610**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.01 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

Wrattonbully wine region

Regional summary report

2007

Wrattonbully

Vintage overview

Vintage report

Wrattonbully experienced a very dry winter period that led to a very cold and dry spring with many frosts. 70% of the region was severely affected – with half of those suffering total crop loss. Summer continued to be dry with one notable exception in January with 80 – 100mm of rain falling in the space of three days, easing what was becoming a very difficult year, and setting up the 'non frosted' vineyards for quite a reasonable finish.

Most producers used twice as much irrigation as normal, with those who started early receiving the greatest rewards.

The HDD of 1820 against the long term average of 1508 was surprising given the cold October temperatures, yet went a long way to explaining why vintage started up to three weeks early, and finished four weeks early. Most vineyards had completed vintage by the 4th of April.

In most cases, the fruit left behind after the frosts suffered from poor, short inconsistent canopies that either had secondary fruit mixed in with primary fruit, or struggled for adequate berry size. On the bright side, receiving wineries all had ample capacity to take more fruit in, and could have handled intake of nearly twice the intake experienced, quite comfortably. The presence of such high HDDs has seen some very high quality parcels delivered, despite the difficult year.

Generally, little or no disease pressure was felt, although wingless grasshopper populations did threaten some areas. The drought however proved a very effective break to the lifecycle and it is expected that hopper populations will have been reduced dramatically.

In summary: a very difficult year with frosts and extremely dry conditions proving challenging. Only 30% of the expected yield occurred with the irony being that some parcels are likely to be exceptional. A good year to have behind us!

Peter Bird
Wrattonbully Grapegrowers' Association

Overview of vintage statistics

The harvest from Wrattonbully was 10,096 tonnes in 2007, less than half of the 2006 harvest. The total value of grapes from the region decreased from $25 million to $13 million but the average purchase values for the major varieties generally increased, with Shiraz and Chardonnay each up by around $200 per tonne.

There were only 16 hectares of new plantings in Wrattonbully in spring 2006 (including top-working and replacements) compared with 27 hectares the previous year. Almost all the new plantings were in Cabernet Sauvignon. Although the amount of new plantings is very small, as appears to be the case across South Australia, there is no indication of any significant removal of grapevines being undertaken.

The estimated production from the Wrattonbully region for 2008 is 20,000 tonnes due to the after-effects of the severe frosts in 2006, and ongoing dry conditions. 22,000 tonnes is already committed to the wineries, there is not expected to be any surplus fruit.

By 2012, the estimated production is 23,000 tonnes, of which 75% (18,000 tonnes) is already under contract or winery grown fruit. This leaves around 5,000 tonnes available on the open market. There is likely to be a return to over-supply on the open market across the state by 2012, if growing conditions return to "normal" (see State Summary section for details).

Wrattonbully

Winegrape intake summary – vintage 2007

Variety	Tonnes purchased	Lowest price[1]	Highest price	Total value purchased grapes	Calc avg. purchase value per tonne	Winery grown fruit	Total crushed	Est total value ALL grapes
RED								
Cabernet Sauvignon	2,988	$500	$2,200	$3,980,331	$1,332	2,233	5,221	$6,955,373
Malbec	14			$14,960	$1,100	0	14	$14,960
Merlot	582	$800	$2,105	$802,992	$1,379	602	1,184	$1,633,027
Other Red	0			$0	$0	12	12	$16,107
Petit Verdot	4			$5,040	$1,200	37	41	$48,948
Pinot Noir	148			$195,915	$1,325	88	236	$312,660
Sangiovese	0			$0	$0	11	11	$14,523
Shiraz	1,239	$600	$2,105	$1,546,683	$1,248	926	2,166	$2,702,821
Tempranillo	25			$55,440	$2,200	2	27	$59,840
Total red winegrapes	**5,000**			**$6,601,360**		**3,911**	**8,911**	**$11,758,259**
RED								
Chardonnay	639	$600	$2,200	$822,003	$1,285	245	884	$1,136,813
Other White	0			$0	$0	12	12	$14,904
Pinot Gris	0			$0	$0	82	82	$103,948
Riesling	19			$18,145	$950	6	25	$23,465
Sauvignon Blanc	58	$950	$1,541	$74,791	$1,282	46	104	$133,757
Semillon	23			$18,096	$800	32	55	$43,856
Viognier	7			$10,360	$1,400	15	22	$31,080
Total white winegrapes	**747**			**$943,395**		**438**	**1,185**	**$1,487,823**
Total all winegrapes	**5,747**			**$7,544,755**		**4,349**	**10,096**	**$13,246,081**

[1] *Lowest and highest prices paid are only reported where there are at least three purchasers*

Wrattonbully

Current plantings and projected production 2008 - 2012

	Current area in hectares by year planted						Estimated production 2008 - 2012				
Variety	*Pre-2004*	*2004*	*2005*	*2006*	*Total*	*% planted in 2006*	*2008*	*2009*	*2010*	*2011*	*2012*
Red winegrapes											
Cabernet Sauvignon	1198	1	0	1	1199	*0%*	8389	9592	9688	9688	9688
Merlot	311	0	1	14	326	*4%*	2802	3185	3217	3217	3217
Other red	21	0	0	0	21	*0%*	145	166	168	168	168
Pinot Noir	15	0	0	0	15	*0%*	139	154	156	156	156
Shiraz	672	0	5	0	677	*0%*	5399	6085	6146	6146	6146
Tempranillo	9	0	0	0	9	*0%*	72	81	81	81	81
Total red winegrapes	**2226**	**1**	**6**	**15**	**2248**	***1%***	**16946**	**19263**	**19456**	**19456**	**19456**
White winegrapes											
Chardonnay	193	28	6	1	229	*1%*	2176	2495	2519	2519	2519
Other white	14	0	0	0	14	*0%*	130	145	146	146	146
Pinot Gris	0	0	11	0	11	*0%*	50	83	84	84	84
Sauvignon Blanc	32	6	0	0	38	*0%*	329	380	384	384	384
Viognier	9	0	4	0	13	*0%*	98	118	119	119	119
Total white winegrapes	**249**	**34**	**21**	**1**	**305**	***0%***	**2783**	**3221**	**3253**	**3253**	**3253**
Total all varieties	**2475**	**35**	**27**	**16**	**2553**	***1%***	**19729**	**22484**	**22709**	**22709**	**22709**

Wrattonbully

Estimated production and committed intake 2008 - 2012

Variety	2008 Est Supply [1]	2008 Winery grown grapes [2]	2008 Contract purchases [2]	2008 Un-contracted fruit [3]	2010 Est Supply [1]	2010 Winery grown grapes [2]	2010 Contract purchases [2]	2010 Un-contracted fruit [3]	2012 Est Supply [1]	2012 Winery grown grapes [2]	2012 Contract purchases [2]	2012 Un-contracted fruit [3]
Red winegrapes												
Cabernet Sauvignon	8,389	4,701	5,384	-1,695	9,688	4,320	3,553	1,814	9,688	4,330	2,025	3,332
Malbec	0	0	21	-21	0	0	21	-21	0	0	21	-21
Merlot	2,802	1,727	1,186	-111	3,217	1,756	771	690	3,217	1,762	552	903
Other Red	145	42	0	103	168	0	0	168	168	0	0	168
Petit Verdot	0	77	6	-83	0	77	6	-83	0	77	6	-83
Pinot Noir	139	151	0	-12	156	138	0	18	156	138	0	18
Sangiovese	0	56	0	-56	0	56	0	-56	0	56	0	-56
Shiraz	5,399	3,313	2,642	-557	6,146	3,452	1,866	827	6,146	3,483	1,331	1,331
Tempranillo	72	10	63	-1	81	10	63	9	81	10	63	9
Total red winegrapes	**16,946**	**10,078**	**9,301**	**-2,433**	**19,456**	**9,810**	**6,280**	**3,366**	**19,456**	**9,857**	**3,998**	**5,601**
White winegrapes												
Chardonnay	2,176	461	1,456	258	2,519	279	1,097	1,143	2,519	279	1,107	1,134
Other White	130	21	0	110	146	21	0	126	146	21	0	126
Pinot Gris	50	97	21	-67	84	644	874	-1,433	84	973	978	-1,867
Riesling	0	30	41	-71	0	30	41	-71	0	30	0	-30
Sauvignon Blanc	329	530	203	-404	384	546	203	-366	384	551	103	-270
Semillon	0	48	0	-48	0	54	0	-54	0	54	0	-54
Viognier	98	60	18	20	119	67	0	53	119	67	0	53
Total white winegrapes	**2,783**	**1,246**	**1,740**	**-202**	**3,253**	**1,641**	**2,215**	**-603**	**3,253**	**1,976**	**2,187**	**-910**
Total all winegrapes	**19,729**	**11,323**	**11,041**	**-2,635**	**22,709**	**11,451**	**8,495**	**2,763**	**22,709**	**11,833**	**6,185**	**4,691**

[1] *Supply forecast derived from planting details recorded on PGIB vineyard register (see planting report)*

[2] *A raising factor of 1.027 has been applied to these figures to allow for non-respondents*

[3] *A negative number indicates supply forecast is below wineries' estimated commitment*

2007