Wrattonbully wine region

Regional summary report

2010

ACKNOWLEDGEMENTS

This survey has been produced by the Phylloxera and Grape Industry Board of South Australia on behalf of the **South Australian Wine Industry Association,** the **Wine Grape Council of SA Inc** and **Primary Industries and Resources SA,** who jointly fund the survey.

The publication of this survey is made possible through the support of the South Australian and interstate wineries that processed fruit from South Australian vineyards in 2010. 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 and supply forecasts are checked by regional industry representatives. Vintage reports have been provided by the regional representatives, local growers or industry associations. Particular thanks for their assistance go to: Jim Caddy, David Edwards, James Freckleton, Juliet Henderson, Elise Heyes, Lian Jaensch, Murray Leake, Frank Nicholls, Louise Rose, Stuart Sharman, Nigel Squire, Michelle Stehbans, David Watkins, and Daniel Zuzolo.

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.

COVER IMAGE

Photograph by Catherine Cox, Phylloxera and Grape Industry Board of SA.

REPORT PREPARATION

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DISCLAIMER

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DOCUMENT STRUCTURE AND LAYOUT

The full survey report incorporates 15 stand-alone 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 one document or in sections as a series of PDF files from the PGIBSA website www.phylloxera.com.au.

INTERPRETATION OF REPORT INFORMATION

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

Any questions about the report should be directed to:

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Explanations and Definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

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

Total crush

The **total crushed** is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia that are known to source fruit from South Australian vineyards are included in the survey collection process. However, not all wineries submit a survey form - therefore the total tonnage reported may underestimate the true crush. An estimate of the non-response rate for each region is provided below each intake summary report. Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

Crop value data

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

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

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

Important note on average purchase value

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

Highest and lowest price

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

FORECASTS

Estimated supply

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

Committed intake

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

Explanations and Definitions

Available supply

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

Comparing supply and committed intake

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

Demand (required intake)

Following consultation with industry during 2009, it was decided to omit demand figures from the 2010 survey. These figures were considered by the majority of respondents to be unreliable and/or unhelpful. They also add considerably to the survey load for the wineries. Readers of this report are encouraged to provide feedback on this decision either directly to SAWIA or the WGCSA, or to the PGIBSA.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2010 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 2010 and include all plantings from the 2009 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 2010 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.

Vintage report

The 2010 vintage was characterised by excellent balance and fruit definition. Overall tonnages were average to slightly above with fruit quality looking strong across all varieties.

We began the season with full soil profiles due to above average rainfall during late winter and early spring. July through to September experienced almost 100mm above the average rainfall for this period (230mm), a situation we have not seen in recent years. Rain fell regularly throughout the growing season providing a much needed boost to canopy growth, resulting in good vine balance and a strong framework to carry the fruit through to harvest.

Flowering and fruit set through November was brought on rapidly by the small heatwave during that month. This led to a very even and consistent set across all varieties, with only Cabernet Sauvignon experiencing reduced fruit set in some areas.

Cool nights through January, February and March with warmer days that lacked the heat spikes experienced in previous seasons, led to a consistent ripening period. This resulted in an early harvest for the whites with good acid levels, and a longer slow ripening of the reds leading to great colour and flavour development.

Rain falling late into harvest resulted in some incidence of Botrytis not really seen in the region since the larger yields of 2004. Conditions favourable for harvest up until early April, together with well managed crop levels, had most of the fruit harvested prior to Easter. 30-40mm of rain fell on the Tuesday after Easter which brought a fairly abrupt end to the 2010 harvest.

Quality on varieties such as Cabernet Sauvignon, Shiraz and Chardonnay was once again very strong this year. Interestingly, it may be the strength of the more marginal varieties that help define the quality of this vintage, as there doesn't appear to have been a weak link.

In summary, the 2010 vintage, as with the past four seasons, produced fruit of excellent quality and should result in wines that are reflective of our region's increasing maturity.

James Freckleton,
Smith & Hooper and Wrattonbully Industry Association

Overview of vintage statistics

The harvest from Wrattonbully was 23,292 tonnes in 2010 was the second largest on record and about 7% above the 2009 harvest. Despite this the total value of grapes from Wrattonbully dropped 10% - from $22.5 million to $20.1 million - and the average purchase values for Shiraz and Cabernet Sauvignon further decreased by $137 and $189 per tonne respectively.

There were only 7 hectares of new plantings in Wrattonbully in spring 2009 (including top-working and replacements). This is an almost negligible amount – less than 1% of the total area. Most of the new plantings (5 hectares) were for Cabernet Sauvignon. The total area planted in Wrattonbully changed very little during this period.

The estimated production from Wrattonbully for 2011 is 23,000 tonnes – the normal expectation for this region. Over 21,000 tonnes is already committed to the wineries, so there is not expected to be any surplus fruit.

In 2015, the estimated production is expected to be about the same. 15,000 tonnes is already under contract or winery grown fruit, leaving around 6,000 tonnes as yet uncontracted.

Across the state, assuming "normal" growing conditions, there is expected to be a 278,000 tonne surplus compared with demand in 2015 (see State Summary section).

Winegrape intake summary - vintage 2010

Variety	Tonnes purchased	Lowest price[1]	Highest price[1]	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed[2]	Est total value ALL grapes
RED								
Cabernet Franc	0					3	3	$2,398
Cabernet Sauvignon	4,750	$300	$3,000	$4,449,114	$937	4,138	8,888	$8,324,943
Malbec	35			$23,624	$670	0	35	$23,624
Merlot	1,801	$300	$1,770	$1,470,977	$817	1,451	3,251	$2,655,932
Other Red	0					46	46	$41,423
Petit Verdot	2			$2,310	$1,100	44	46	$50,710
Pinot Noir	199	$400	$900	$139,530	$700	283	482	$337,515
Sangiovese	0					53	53	$47,322
Shiraz	3,612	$300	$3,000	$3,209,434	$889	3,081	6,692	$5,947,281
Tempranillo	61			$97,984	$1,601	6	67	$107,590
Total Red winegrapes	**10,460**			**$9,392,972**		**9,104**	**19,564**	**$17,538,737**
WHITE								
Chardonnay	1,293	$250	$1,000	$740,395	$573	446	1,739	$995,479
Marsanne	0					36	36	$23,379
Pinot Gris	73	$565	$1,000	$57,152	$787	802	875	$688,903
Riesling	90			$89,434	$997	49	138	$137,879
Sauvignon Blanc	432	$250	$1,075	$337,948	$782	317	749	$585,806
Semillon	0					30	30	$19,450
Viognier	57			$48,654	$850	105	162	$137,564
Total White winegrapes	**1,945**			**$1,273,583**		**1,783**	**3,728**	**$2,588,460**
Grand Total All winegrapes	**12,405**			**$10,666,555**		**10,887**	**23,292**	**$20,127,197**

1 Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.

2 It is estimated that the non-response rate for Wrattonbully 0%.

Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2007*	*2007*	*2008*	*2009*	*Total area*	*% planted in 2009*
Red winegrapes						
Barbera	1	0	0	0	1	*0%*
Cabernet Franc	1	0	0	0	1	*0%*
Cabernet Sauvignon	1202	0	0	5	1207	*0%*
Malbec	4	0	0	0	4	*0%*
Merlot	325	0	0	0	325	*0%*
Meunier (Pinot Meunier)	3	0	0	0	3	*0%*
Petit Verdot	6	0	0	0	6	*0%*
Pinot Noir	15	9	22	0	46	*0%*
Sangiovese	4	0	0	0	4	*0%*
Shiraz	696	1	4	0	701	*0%*
Tempranillo	9	0	0	0	9	*0%*
Total red varieties	**2265**	**10**	**26**	**5**	**2306**	***0%***
White winegrapes						
Chardonnay	204	0	0	0	204	*0%*
Marsanne	2	0	0	0	2	*0%*
Pinot Gris	93	0	0	0	93	*0%*
Riesling	7	0	0	0	7	*0%*
Sauvignon Blanc	42	2	4	2	50	*4%*
Semillon	6	0	0	0	6	*0%*
Viognier	11	0	0	0	11	*0%*
Total white varieties	**364**	**2**	**4**	**2**	**372**	***1%***
Total all varieties	**2629**	**12**	**30**	**7**	**2679**	***0%***

Wrattonbully

Estimated supply and committed intake 2011 - 2015

Variety	2011 Est Supply [1]	2011 Committed intake[2] Winery grapes	2011 Committed intake[2] Contract purchases	2011 Committed intake[2] Total committed intake	2013 Est Supply [1]	2013 Committed intake[2] Winery grapes	2013 Committed intake[2] Contract purchases	2013 Committed intake[2] Total committed intake	2015 Est Supply [1]	2015 Committed intake[2] Winery grapes	2015 Committed intake[2] Contract purchases	2015 Committed intake[2] Total committed intake
Red winegrapes												
Cabernet Franc	5	3	0	3	5	3	0	3	5	3	0	3
Cabernet Sauvignon	9,612	4,009	3,921	7,930	9,641	4,009	2,194	6,203	9,641	4,009	912	4,921
Malbec	33	0	0	0	33	0	0	0	33	0	0	0
Merlot	2,923	1,512	1,290	2,801	2,923	1,528	767	2,295	2,923	1,528	403	1,931
Other Red	0	41	0	41	0	41	0	41	0	41	0	41
Petit Verdot	53	75	3	78	53	75	3	78	53	75	3	78
Pinot Noir	261	377	134	512	318	377	110	488	318	377	0	377
Sangiovese	32	47	0	47	32	47	0	47	32	47	0	47
Shiraz	6,638	3,632	2,472	6,104	6,648	3,662	1,298	4,960	6,648	3,712	736	4,448
Tempranillo	72	6	56	62	72	6	56	62	72	6	56	62
Total red winegrapes	**19,661**	**9,703**	**7,876**	**17,579**	**19,757**	**9,749**	**4,428**	**14,177**	**19,757**	**9,799**	**2,111**	**11,910**
White winegrapes												
Chardonnay	1,835	563	622	1,185	1,835	563	489	1,052	1,835	563	392	955
Marsanne	15	27	0	27	15	27	0	27	15	27	0	27
Pinot Gris	836	1,045	146	1,190	836	1,045	146	1,190	836	1,045	146	1,190
Riesling	55	44	83	127	55	44	50	94	55	44	50	94
Sauvignon Blanc	363	490	299	789	382	496	282	778	382	496	194	689
Semillon	57	35	0	35	57	35	0	35	57	35	0	35
Viognier	86	62	56	118	86	62	0	62	86	62	0	62
Total white winegrapes	**3,248**	**2,266**	**1,206**	**3,472**	**3,267**	**2,272**	**966**	**3,238**	**3,267**	**2,272**	**782**	**3,054**
Total all winegrapes	**22,909**	**11,969**	**9,082**	**21,051**	**23,024**	**12,021**	**5,394**	**17,415**	**23,024**	**12,071**	**2,892**	**14,963**

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

[2] *A raising factor of 1.0 has been applied to committed intake to allow for non-respondents*