SA Winegrape Crush Survey

Regional Summary Report - 2014

Wrattonbully Wine Region

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 and committed intake

The estimated supply and committed intake report has been removed from the 2014 Winegrape Crush Survey. It has been identified that the methodology used to determine the estimated supply requires review.

To assist industry stakeholders gain an understanding of state and regional estimated supply, the last 5 years actual total tonnes crushed at the state level and each region has been averaged. A range is then provided using the highest and lowest figures from the actual tonnes crushed.

The estimated committed intake is the amount of fruit that wineries are already committed to take in, for 2015. 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 cont.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2014 South Australian Crush Survey of wineries. The information is obtained from the vineyard register maintained by the Phylloxera and Grape Industry Board of South Australia.

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

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

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2014 and include all plantings from the 2013 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 2013 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 zero (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 overview

Vintage report

The season got off to a cool and wet start followed by a windy and dry spring, hot summer and mild days with cold nights through autumn which has culminated into a long drawn out vintage.

Winter rainfalls were near the long term average this season and as a result soils reached field capacity which got the vines off to a good start.

Spring daily maximum temperatures were slightly down on long term average this season. This was driven by cool nights, early morning cloud cover and constant southerly winds. November in particular had 13 nights under 5 degrees. These cool temperatures and strong southerly winds extended the flowering over a 6 week period. As a result, set was poor on most varieties with some yields significantly down on average, cabernet sauvignon being the worst affected.

Late December saw a start to the warm weather with it reaching 42.7°C on the 19th of December. The heat continued into January with the season's first heatwave from the 13th to the 17th with all 5 days over 40°C and the 14th reaching a record breaking 45.8°C. Heat through the veraison period kept berry size small further impacting on the already light crops.

Although a season with low yields, wine quality is strong. Lighter crops meant that the Pinot Gris was picked with great pear and green apple flavours, persistent natural acidity and lower sugar levels than previous seasons; 2014 continues the trend for excellent Pinot Gris in Wrattonbully. Varieties with larger canopies such as Chardonnay, Riesling and Sauvignon Blanc were all picked 1-2 weeks later than the last few seasons due to the cool weather post the summer heat. Sauvignon Blanc has been the other stand-out variety with intense passionfruit and nettle notes with the wines having excellent body and length

Due to the cooler conditions later in the season, red grapes have been particularly late compared to the early seasons of recent years. However flavours have developed in balance as acid and sugar accumulated. The first red grapes to come off were Tempranillo, and then there was a break of two weeks before the first of the Merlot was harvested. Shiraz was not delayed though shows intense perfumed spice and pepper characters typical of the cool climate expression of the variety. The delayed ripening was most evident in Cabernet Sauvignon with little sugar accumulation for several weeks giving the grapes extended "hang time" enabling ripe mature skin and seed tannin development at lower potential alcohols. 2014 in Wrattonbully is a classic Cabernet Sauvignon vintage with Merlot wines having similar strength.

James Freckleton
Wrattonbully Wine Region Association

Overview of vintage statistics

The harvest from Wrattonbully region was 17,845 tonnes in 2014, down by 1,361 tonnes (7.0%) on the 2013 harvest of 19,206 tonnes. There was an estimated non-response rate of 0% across the region. The total value of grapes from Wrattonbully decreased slightly from $19.1 million to $17.4 million. The average purchase value for red varieties decreased, with Cabernet Sauvignon down slightly by $5 per tonne to $1,142 per tonne, Shiraz down by $113 per tonne to $992 per tonne, whilst of the white varieties; Chardonnay is up by $76 per tonne to $757 per tonne.

There was 6 hectares of new plantings in Wrattonbully in spring 2013 (including top-working and replacements) compared with no plantings in 2012. Cabernet Sauvignon accounted for 83.4% of the new plantings. The total planted area of vines decreased slightly by 8 hectares to 2,679 hectares.

Over the last 5 years, the average Wrattonbully production was 19,482 tonnes, with a low of 14,105 tonnes in 2011 and a high of 23,292 tonnes in 2010. The 2014 crush is down by 9.2% against the last 5 year average. For 2015, the estimated committed intake is 19,255 tonnes.

Wrattonbully

Winegrape intake summary - vintage 2014

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 Sauvignon	3,010	$600	$2,700	$3,437,635	$1,142	2,660	5,671	$6,475,712
Malbec	33			$25,345	$780	0	33	$25,345
Merlot	942	$500	$1,588	$790,009	$839	1,278	2,220	$1,862,367
Other red	10			$10,714	$1,100	60	70	$73,746
Petit Verdot	2			$2,916	$1,200	75	77	$92,556
Pinot Noir	136	$600	$1,650	$133,051	$981	327	462	$453,704
Shiraz	2,493	$550	$1,900	$2,472,311	$992	3,274	5,767	$5,718,872
Tempranillo	40			$66,281	$1,650	20	60	$99,611
Total Red winegrapes	**6,666**			**$6,938,261**		**7,694**	**14,360**	**$14,801,913**
WHITE								
Chardonnay	1,083	$350	$1,650	$819,620	$757	633	1,716	$1,298,545
Other white	31			$15,380	$500	57	88	$58,611
Pinot Gris	383	$900	$1,200	$354,595	$927	288	671	$621,401
Riesling	20			$12,000	$600	70	90	$53,934
Sauvignon Blanc	366	$500	$900	$253,579	$693	475	841	$582,423
Semillon	40			$12,042	$300	39	80	$23,853
Traminer	2			$1,732	$825	0	2	$1,732
Total White winegrapes	**1,925**			**$1,468,948**		**1,561**	**3,486**	**$2,640,498**
Grand Total All winegrapes	**8,590**			**$8,407,210**		**9,255**	**17,845**	**$17,442,411**

1 Lowest and highest prices are only reported when there are at least three purchasers. Very low or high 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 is 0%.

Wrattonbully — Current plantings by variety and year planted

	Current area in hectares					
Variety	*Pre-2011*	*2011*	*2012*	*2013*	*Total area*	*% planted in 2013*
Red winegrapes						
Cabernet Sauvignon	1,201	1	0	5	1,207	*0%*
Malbec	5	0	0	0	5	*0%*
Merlot	297	2	0	0	299	*0%*
Other Red	9	0	0	0	9	*0%*
Petit Verdot	6	0	0	0	6	*0%*
Pinot Noir	64	0	0	0	64	*0%*
Shiraz	673	5	2	0	681	*0%*
Tempranillo	9	0	0	0	9	*0%*
Total red varieties	2,265	8	2	5	2,280	*0%*
White winegrapes						
Chardonnay	200	0	0	0	200	*0%*
Marsanne	2	0	0	0	2	*0%*
Pinot Gris	94	0	0	0	94	*0%*
Prosecco	5	0	0	0	5	*0%*
Riesling	7	0	0	0	7	*0%*
Sauvignon Blanc	57	0	0	1	58	*2%*
Semillon	5	0	0	0	5	*0%*
Viognier	6	0	0	0	6	*0%*
Total white varieties	377	0	0	1	378	*0%*
Unknown variety	22	0	0	0	22	*0%*
Total all varieties	2,663	8	2	6	2,679	*0%*