

FLEURIEU ZONE (OTHER) VINTAGE OVERVIEW

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

See map of Kangaroo Island GI at the end of this regional report.

Vintage report - Currency Creek

Looking back it was a kind growing season and vintage in the Currency Creek region. Conditions were generally cool and dry with the early and late rains during vintage not having any significant effect on grape quality.

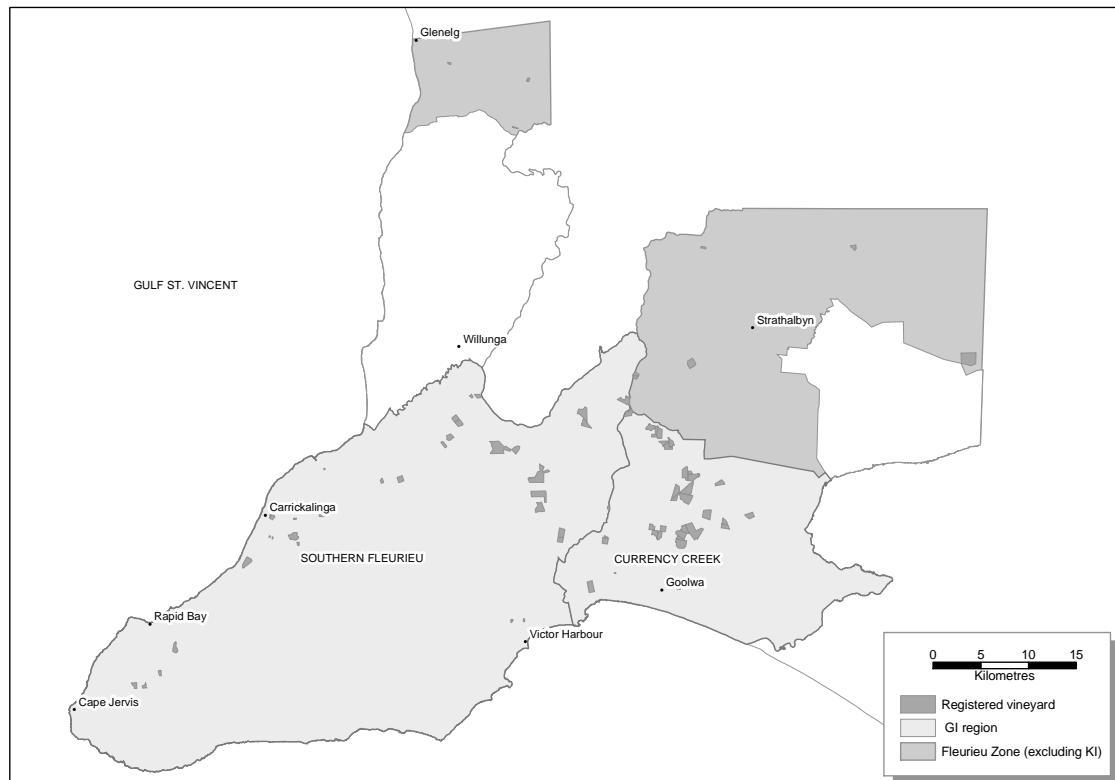
There was little disease pressure to contend with. The blackbirds continue to be the most serious and persistent pest in the region!

The harvest began late February for the white varieties and continued through to the end of April before the reds were completed. Yields were down 10% across most varieties except Sauvignon Blanc, which was 50% down on average.

The wines from the vintage are showing real promise, particularly the Cabernet Sauvignon.

Philip Shaw

Ballast Stone Estate



Overview of vintage statistics

The Fleurieu zone (other) comprises a total of 1140 hectares, and produced a total crush of 7,108 tonnes in 2003 - substantially more than in 2002 (4110 tonnes). There was a surplus of red varieties and a slight shortfall of white varieties (although these only accounted for 10% of the region's production).

The calculated average purchase value of Shiraz was up by \$250 per tonne, more than compensating for the drop of \$150 per tonne last year compared with the year before. On the other hand, Cabernet Sauvignon dropped by a further \$100 per tonne after a drop of \$200 last year. In the white varieties, the average value of Chardonnay and Sauvignon Blanc increased by over \$200 per tonne (although this is based on very small tonnages).

The forecast for this region is for a 30% increase in production of red varieties by 2008 (compared with 2003), but a surplus in each year - mainly in Cabernet Sauvignon. White varieties are expected to increase in production from just over 1100 tonnes in 2004 to 3400 tonnes in 2008, and to be in short supply each year. This mainly reflects a shortfall in Chardonnay.

There was virtually no new planting of red varieties in 2002, while white varieties increased by 12% overall (mainly Chardonnay).

FLEURIEU ZONE (OTHER)* CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 8.1

Area in hectares by year planted

Variety	Pre-99	1999	2000	2001	2002	Total	% planted 2002
RED WINEGRAPES							
CABERNET FRANC	1	0	0	3	0	4	0%
CABERNET SAUVIGNON	162	70	126	39	5	403	1%
GRENACHE	3	0	20	1	0	24	0%
MALBEC	2	0	0	1	0	4	0%
MERLOT	45	4	17	29	0	94	0%
NEBBIOLO	0	0	0	1	0	1	0%
PETIT VERDOT	2	5	1	0	0	8	0%
PINOT NOIR	21	2	5	2	0	30	0%
SANGIOVESE	0	3	0	13	0	16	0%
SHIRAZ	232	33	31	28	2	326	1%
TEMPRANILLO	0	0	0	3	2	5	34%
OTHER RED	5	0	0	0	0	5	0%
TOTAL RED WINEGRAPES	475	117	200	121	8	920	1%
WHITE WINEGRAPES							
CHARDONNAY	41	8	2	20	14	83	17%
COLOMBARD	2	0	0	0	0	2	0%
RIESLING	6	0	6	1	6	18	30%
ROUSSANNE	0	0	0	1	0	1	0%
SAUVIGNON BLANC	35	3	1	11	7	57	12%
SEMILLON	26	0	4	1	0	30	0%
TRAMINER	0	0	6	0	0	6	0%
VERDELHO	4	0	0	1	0	6	0%
VIOGNIER	0	8	2	5	1	15	7%
OTHER WHITE	0	1	0	0	0	1	0%
TOTAL WHITE WINEGRAPES	114	19	21	39	27	219	12%
TOTAL ALL VARIETIES	588	136	220	159	35	1140	3%

* Includes Currency Creek (560ha); Southern Fleurieu (254ha); Kangaroo Island (105ha) and Fleurieu Zone - other (224ha).

FLEURIEU ZONE (OTHER) TONNES CRUSHED BY VARIETY - VINTAGE 2003

Table 8.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0)		
							Own	Other	Preferred
RED									
Cabernet Sauvignon	935	1759	2695	1884	65%	143%	5	18	15
Chambourcin	0	19	19	19	100%	100%	0	1	1
Grenache	10	90	100	10	90%	1000%	1	1	1
Malbec	1	0	1	1	0%	55%	1	0	1
Merlot	246	191	437	381	44%	115%	5	6	10
Petit Verdot	41	13	54	60	24%	90%	2	3	5
Pinot Noir	0	141	141	132	100%	106%	0	5	3
Sangiovese	0	32	32	18	100%	178%	0	1	1
Shiraz	827	2102	2929	2297	72%	127%	6	17	16
Tempranillo	0	4	4	6	100%	58%	0	1	1
Zinfandel	0	20	20	20	100%	98%	0	1	1
Total RED	2059	4371	6430	4828	68%	133%			
WHITE									
Chardonnay	99	136	235	402	58%	58%	3	7	7
Pinot Gris	0	0	0	5		0%	0	0	1
Riesling	59	1	60	71	2%	84%	3	1	4
Sauvignon Blanc	101	107	208	324	52%	64%	3	7	7
Semillon	41	93	134	98	70%	136%	2	3	3
Traminer	0	19	19	0	100%		0	1	0
Verdelho	0	11	11	13	100%	85%	0	1	1
Viognier	6	6	12	15	50%	80%	1	1	1
Total WHITE	305	373	678	928	55%	73%			
Total for region	2365	4744	7108	5756					

FLEURIEU ZONE (OTHER) CROP VALUE DATA - VINTAGE 2003

Table 8.3

Variety (1)	Grower grown	Total crushed	estimated total value		lowest price (2)	highest price(2)	calc average purchase value per tonne (3)		
			purchased grapes	total grapes					
RED									
Cabernet Sauvignon	1759	2695	\$2,615,468	\$4,006,106	\$600	\$2,500	\$1,487	100%	
Chambourcin	19	19	\$30,880	\$30,880			\$1,600	100%	
Grenache	90	100	\$107,976	\$119,973			\$1,200	100%	
Merlot	191	437	\$269,332	\$615,470	\$1,000	\$1,567	\$1,410	100%	
Petit Verdot	13	54	\$21,286	\$87,402	\$1,442	\$1,900	\$1,613	100%	
Pinot Noir	141	141	\$154,643	\$154,643	\$853	\$1,368	\$1,098	100%	
Sangiovese	32	32	\$44,856	\$44,856			\$1,400	100%	
Shiraz	2102	2929	\$3,802,594	\$5,298,651	\$1,000	\$2,900	\$1,809	100%	
Tempranillo	4	4	\$4,900	\$4,900			\$1,400	100%	
Zinfandel	20	20	\$35,208	\$35,208			\$1,800	100%	
Total RED	4371	6430	\$7,087,143	\$10,398,089					
WHITE									
Chardonnay	136	235	\$217,907	\$376,603	\$1,140	\$2,100	\$1,604	100%	
Riesling	1	60	\$1,080	\$71,880			\$1,200	100%	
Sauvignon Blanc	107	208	\$146,240	\$283,510	\$1,150	\$2,000	\$1,366	100%	
Semillon	93	134	\$91,155	\$130,941	\$950	\$1,200	\$980	100%	
Traminer	19	19	\$20,768	\$20,768			\$1,093	100%	
Verdelho	11	11	\$10,723	\$10,723			\$975	100%	
Viognier	6	12	\$8,876	\$17,752			\$1,479	100%	
Total WHITE	373	678	\$496,749	\$912,176					

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

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

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

FLEURIEU ZONE (OTHER) ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2004 TO 2008

Table 8.4

Variety	2004		2005		2006		2007		2008	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Cabernet Sauvignon	3169	2049	3085	2149	3090	2181	3079	2186	3095	2335
Grenache	120	10	120	10	130	20	130	20	54	20
Malbec	1	1	1	1	1	1	0	0	0	0
Merlot	580	488	827	636	917	847	1018	957	1159	1098
Petit Verdot	55	55	63	63	75	75	85	85	90	90
Pinot Noir	194	180	216	207	216	207	216	207	200	207
Sangiovese	32	24	32	32	32	32	32	32	32	32
Shiraz	3563	2404	3674	3032	4019	3543	4155	3611	4522	3979
Tempranillo	24	12	40	12	40	24	40	40	40	40
Zinfandel	20	20	20	20	20	20	20	20	20	20
Total for RED	7757	5244	8078	6163	8541	6951	8776	7159	9213	7822
WHITE										
Chardonnay	455	610	895	1017	1242	1469	1672	1971	2166	2535
Pinot Gris	2	5	2	5	3	5	3	5	4	5
Riesling	80	86	104	110	135	137	187	189	287	289
Sauvignon Blanc	315	281	369	322	339	322	343	322	368	336
Semillon	148	98	148	98	149	98	351	298	518	498
Traminer	56	0	84	0	84	0	84	0	0	0
Verdelho	13	13	16	16	16	16	16	16	16	16
Viognier	55	18	55	18	55	18	55	18	41	18
Total for WHITE	1124	1111	1673	1586	2023	2065	2711	2819	3400	3697
Total for region	8881	6355	9751	7749	10564	9016	11487	9978	12613	11519

KANGAROO ISLAND GI REGION SHOWING VINEYARD PLANTINGS

