OVERVIEW OF VINTAGE STATISTICS 2001

State and regional overview

The total crush of South Australian winegrapes in 2001 was 678,821 tonnes. This compares with 482,157 tonnes in 2000 – an increase of 40% in volume (table 1.1). Nationally, there was an increase of 25% compared with last year.

The total estimated value of the crush was $754.5 million. This compares with $469 million in 2000 – an increase of nearly $300 million or 60% in value to the state's economy (table 1.5).

Increases in volumne are attributed to an increase in yield of 10% - 30% in most regions, together with a massive increase in new plantings coming on stream – particularly in regions such as Coonawarra, the Adelaide Hills and Langhorne Creek.

Unexpectedly large yields in some varieties and regions have meant that the "preferred" (anticipated) tonnage is lower than the actual crush - or even lower than the wineries' own production. Despite the extra tonnages, wineries did not seem to have any major difficulties in processing the fruit.

Conditions were also ideal, particularly for red varieties, with good winter and spring rains followed by heat in December, January and February in most regions. There was very little disease pressure, and good canopy cover generally protected bunches from the worst of the heat. Later maturing reds benefited from reviving rains and milder conditions in early autumn - resulting in good colour and flavour development in the cooler regions.

There were increases of around 33% in McLaren Vale and the Barossa Valley, 50% in Padthaway, Langhorne Creek and Clare, and nearly 60% in Coonawarra and the Adelaide Hills (figure 1.1).

The Riverland produced 327,000 tonnes – 48% of the state's total crush. The next largest regions by volume were McLaren Vale, the Barossa Valley, Coonawarra and Langhorne Creek – each at 8% of the total (table 1.3).

Varietal overview

Red varieties accounted for 66% (two thirds) of the crush. This compared with 58% nationally, showing SA to be ahead of the national trend towards red varieties.

The red crush was 450,234 tonnes. The white crush was 228,587 tonnes. There was a very slight (3%) overall surplus of fruit, which was almost entirely due to a surplus of red grapes (table 1.2).

The top three individual varieties were Shiraz (28%), Cabernet Sauvignon (23%) and Chardonnay (15%). Merlot increased by 65% to be the next largest variety by volume - accounting for 5% of the total crush. Nationally, Chardonnay is still the second largest variety at 20%, with Cabernet Sauvignon at 19% of the total crush.

While the harvest of almost all varieties was substantially up on the 2000 harvest, the crush of multipurpose varieties continued to decline. Muscat Gordo Blanco was down by 10%, and the Sultana crush was less than half last year's amount.

Source of fruit

Winery grown fruit accounted for 31% of the crush in 2001, compared with 24% in 2000. This difference was largely due to the unexpectedly large tonnages in some regions that have a predominance of winery grown fruit. There is considerable variation between regions in the percentage of winery grown vs independently grown fruit – from 78% in Coonawarra and Bordertown to 16% in the Riverland and 14% in the Adelaide Hills (table 1.3). The percentage of winery grown fruit in each region is projected to remain stable at around 28% of the crush over the five year forecast period.

Projections of future supply and demand

Projected tonnages over the five year forecast period are expected to stabilise, with only slow growth from 2004 onwards, and a close match between supply and demand figures. Red tonnages are expected to plateau at around 570,000, and white tonnages at around 260,000.

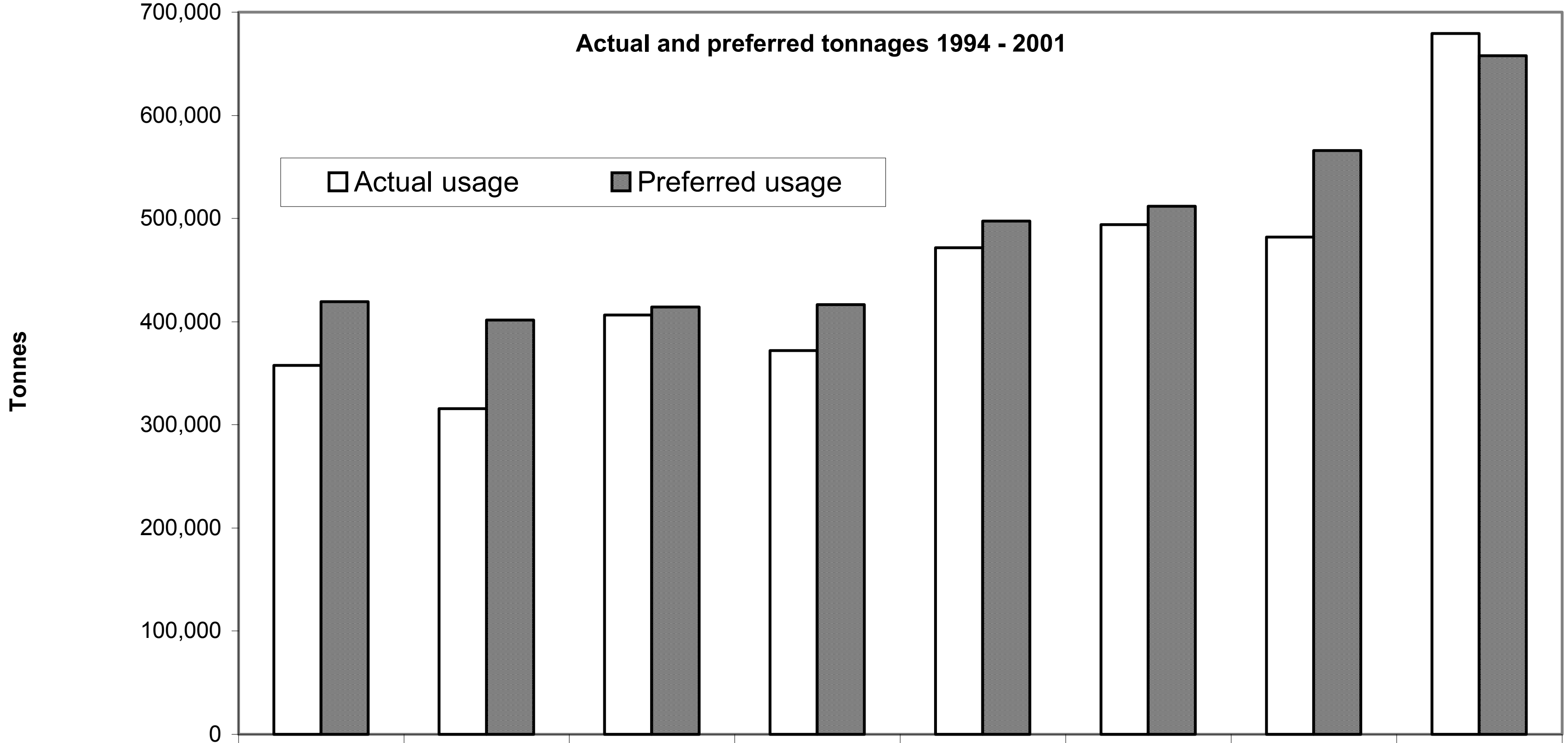
Some regions are expected to grow more than others over the forecast period – with the Clare Valley, Barossa Valley, Eden Valley, Langhorne Creek and Fleurieu zone (other) all expected to grow by around 40% to 50%, McLaren Vale by 39% and the Riverland by 23%. The Adelaide Hills, Coonawarra and Padthaway regions are not expected to show any further increases from the 2001 tonnages (table 1.4).

Based on the projections supplied by the wineries, and taking an average of the yield figures for the past three years, it can be estimated that the required number of hectares to produce the fruit required in 2006 is around 65,000 hectares. There are currently 58,000 hectares planted to vines in South Australia. This indicates that only 7,000 hectares need to be planted in the next three years to meet the industry's sales targets for 2006. The shortfall is not evenly distributed between regions; the Riverland (2500 hectares shortfall), Barossa/Eden Valleys (2800 ha), Langhorne Creek (1200 ha) and Clare (900 ha) are the only regions with any significant shortfalls. In Coonawarra and the Adelaide Hills, according to the estimates there are *already* more than enough hectares of vines planted to meet the projected demand in 2006 (table 1.9).

Planting data derived from the Phylloxera and Grape Industry Board's database shows that there has already been a substantial slow down in plantings - with new plantings of red varieties having almost halved compared with last year (figure 1.7).

HISTORICAL TRENDS IN PRODUCTION - 1994 TO 2001

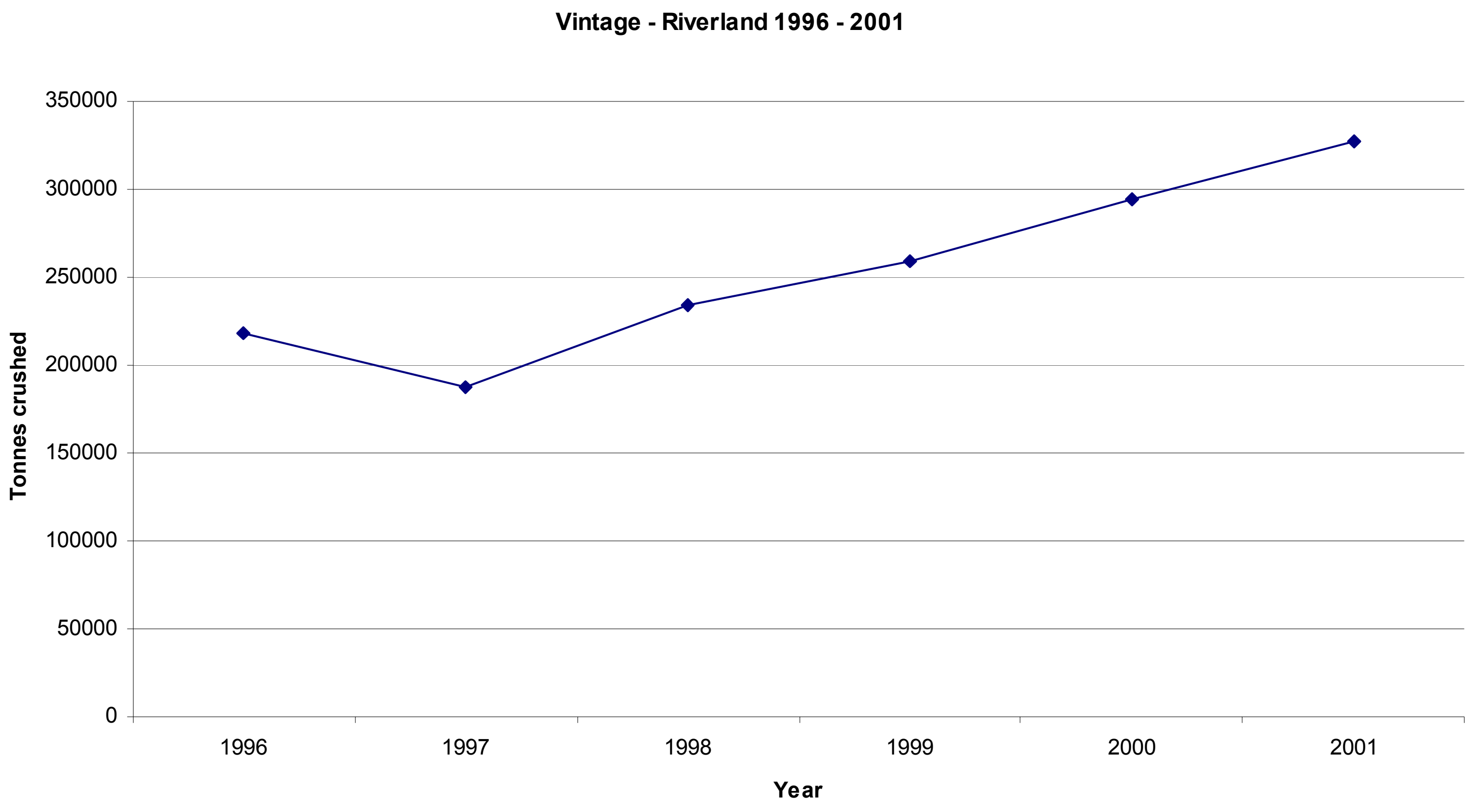
Table 1.1



	1994	1995	1996	1997	1998	1999	2000	2001
Actual usage	357217	315482	406387	371533	471313	494205	482157	678821
Preferred usage	418983	401665	414101	416162	497349	511863	565750	657414

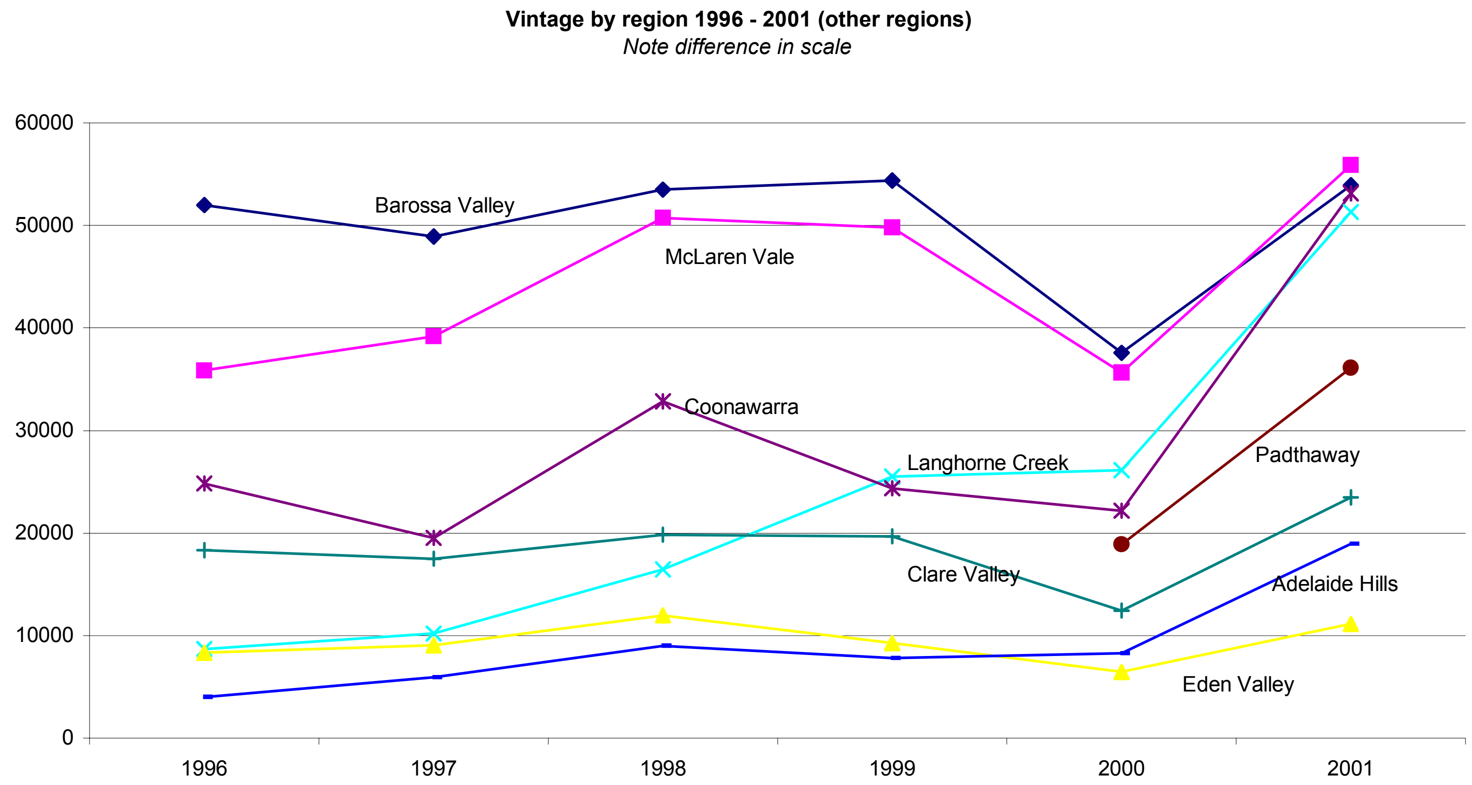
HISTORICALTRENDS IN PRODUCTION 1996 TO 2001 - RIVERLAND

Figure 1.1



HISTORICALTRENDS IN PRODUCTION 1996 TO 2001 - OTHER MAJOR REGIONS

Figure 1.2



VINTAGE 2001 BY VARIETY

Table 1.2

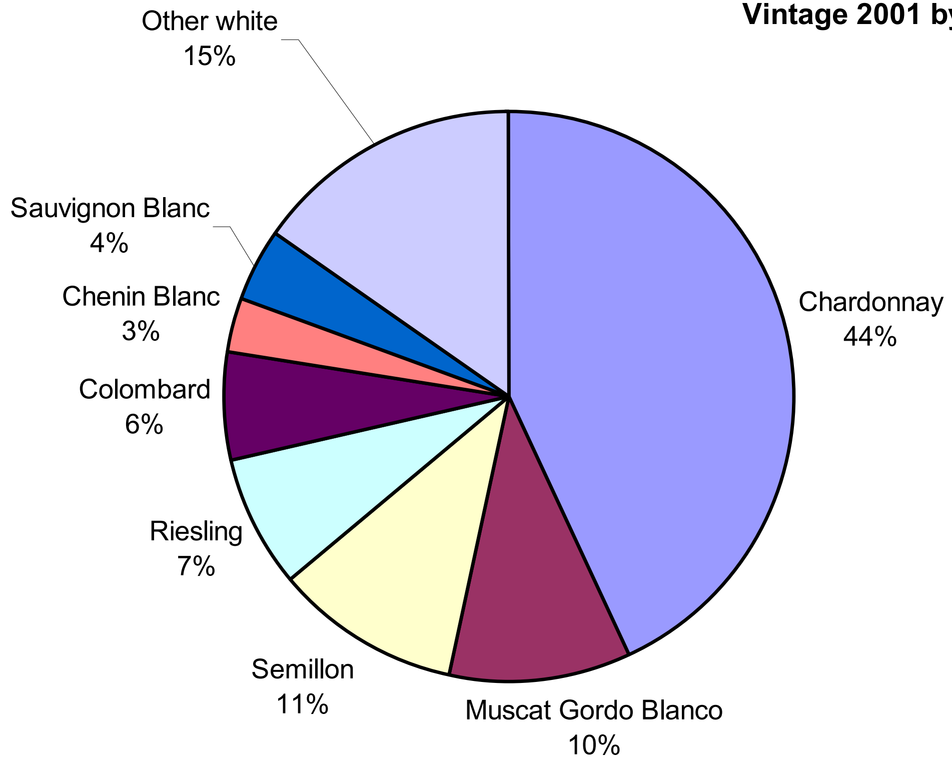
Variety	Tonnes crushed	Tonnes preferred	Diff'ce*	% diff'ce*
RED				
Cabernet Franc	2695	2197	498	18%
Cabernet Sauvignon	154518	145345	9173	6%
Grenache	18679	22466	-3787	-20%
Malbec	2679	2590	89	3%
Mataro	8682	10975	-2294	-26%
Merlot	34299	33754	546	2%
Meunier	605	513	92	15%
Petit Verdot	5439	5264	174	3%
Pinot Noir	13384	10388	2997	22%
Ruby Cabernet	12851	11089	1762	14%
Sangiovese	1737	1067	670	39%
Shiraz	191082	179552	11530	6%
Tarrango	998	1433	-434	-44%
Other red	2585	2247	338	13%
Total red	450234	428880	21354	5%
WHITE				
Biancone	988	650	338	34%
Chardonnay	103608	106882	-3274	-3%
Chenin Blanc	7241	7008	233	3%
Colombard	14935	14463	472	3%
Doradillo	3675	2629	1046	28%
Muscadelle (Tokay)	950	583	367	39%
Muscat Blanc	1650	1224	427	26%
Muscat Gordo Blanco	25073	23329	1743	7%
Palomino	1230	1191	38	3%
Pedro Ximenes	776	655	121	16%
Riesling	18056	21010	-2954	-16%
Sauvignon Blanc	10005	9897	107	1%
Semillon	25481	22986	2494	10%
Sultana	5667	7185	-1518	-27%
Sylvaner	872	1510	-638	-73%
Traminer	1596	2015	-420	-26%
Trebbiano	985	859	125	13%
Verdelho	3189	2147	1042	33%
Viognier	408	778	-370	-91%
Other white	2205	1531	674	31%
Total white	228587	228534	53	0%
Total all varieties	**678821**	**657414**	**21407**	**3%**

** A negative difference indicates a shortfall; a positive difference indicates a surplus*

Figure 1.3

Figure 1.4

Vintage 2001 by variety - white



VINTAGE BY VARIETY - COMPARISON OF 2000 AND 2001

Figure 1.5

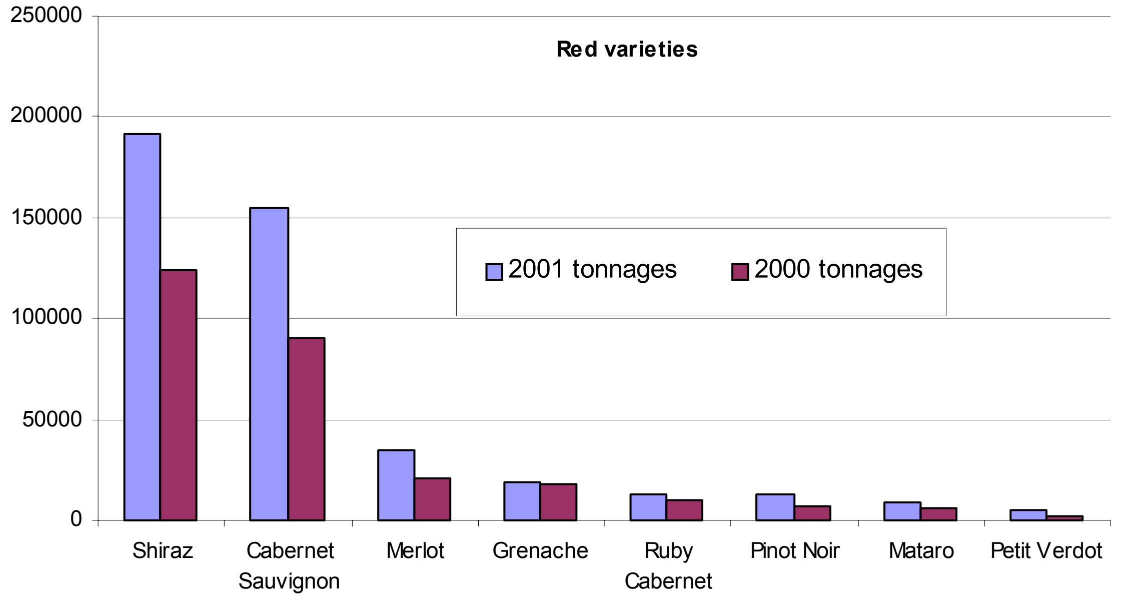
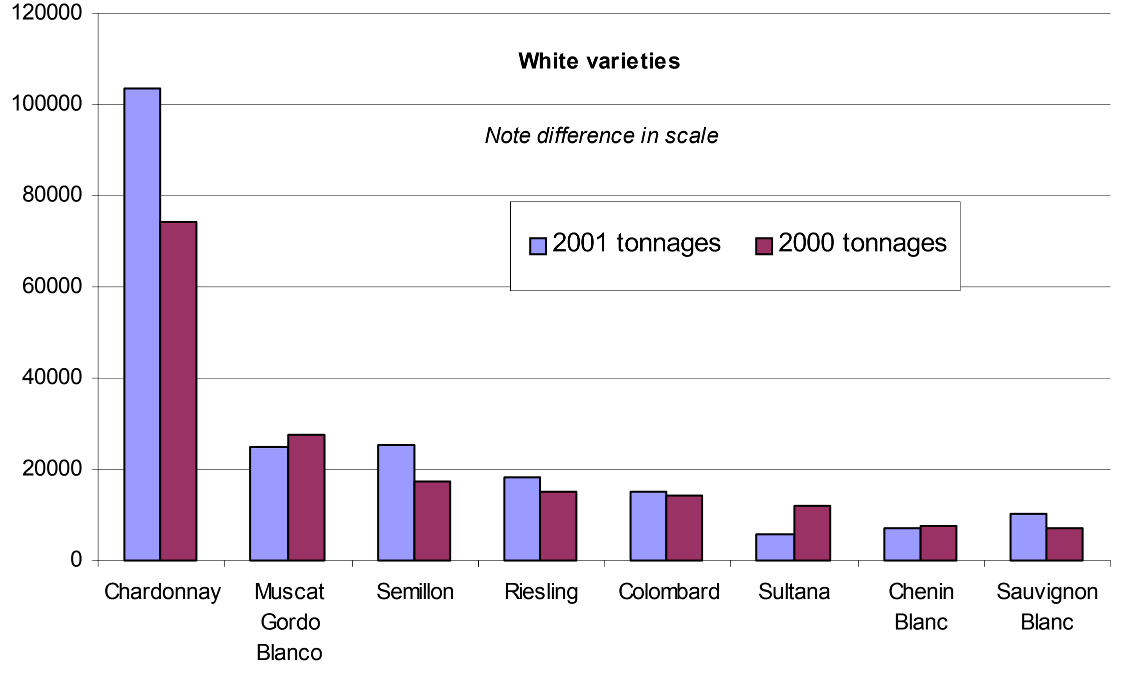


Figure 1.6



VINTAGE 2001 BY SOURCE OF FRUIT BY REGION

Table 1.3

Region	Winery grown (tonnes)	Independent grower (tonnes)	Total crush (tonnes)	% winery grown
Adelaide Hills	2586	16334	18920	14%
Barossa Valley	9908	43990	53898	18%
Bordertown	5195	1434	6629	78%
Clare Valley	13444	10049	23493	57%
Coonawarra	41310	11815	53125	78%
Eden Valley	5650	5481	11131	51%
Fleurieu zone - other	1940	3126	5066	38%
Langhorne Creek	20489	30821	51309	40%
Limestone Coast zone - other	4704	6241	10945	43%
McLaren Vale	12968	42904	55872	23%
Mount Lofty zone - other	980	4983	5963	16%
Padthaway	25697	10419	36116	71%
Riverland	53490	273614	327104	16%
SA - other	211	2867	3078	7%
Wrattonbully	10884	5289	16172	67%
Total	**209455**	**469365**	**678821**	**31%**

2001 CRUSH COMPARED WITH 2006 ESTIMATED DEMAND - BY REGION

Table 1.4

Region	2001 actual	2006 preferred	Diff'ce*	% diff'ce*
Adelaide Hills	18920	19002	-82	0%
Bordertown	6629	11131	-4502	-68%
Barossa Valley	53898	83668	-29770	-55%
Clare Valley	23493	35047	-11554	-49%
Coonawarra	53125	46136	6989	13%
Eden Valley	11131	16165	-5034	-45%
Fleurieu zone other	5066	7380	-2314	-46%
Langhorne Creek	51309	72869	-21560	-42%
Limestone Coast - other	10945	11046	-101	-1%
McLaren Vale	55872	77883	-22011	-39%
Mount Lofty zone other	5963	5603	360	6%
Padthaway	36116	33408	2708	7%
Riverland	327104	400912	-73808	-23%
Wrattonbully	16172	18006	-1834	-11%
South Australia - other	3078	3019	59	2%
Total	**678821**	**841275**	**-162454**	**-24%**

** A negative difference indicates a shortfall; a positive difference indicates a surplus*

VINTAGE STATISTICS 2001 BY REGION

Table 1.5

		total winery grown	*total purchased*	*total crushed*	*estimated value of purchased grapes*	*estimated value of total crush*	*average reliability of estimated value*
Adelaide Hills							
	Red	841	9398	10239	$15,952,463	$17,333,940	98%
	White	1745	6935	8680	$11,408,973	$14,325,101	96%
	sum	2586	16334	18920	$27,361,436	$31,659,041	N/A
Barossa Valley							
	Red	6963	27388	34351	$47,899,806	$60,054,351	95%
	White	2946	16602	19547	$14,474,639	$17,053,537	98%
	sum	9908	43990	53898	$62,374,445	$77,107,889	N/A
Bordertown							
	Red	3590	1010	4600	$1,851,072	$8,258,938	100%
	White	1605	424	2029	$408,788	$2,670,801	75%
	sum	5195	1434	6629	$2,259,860	$10,929,739	N/A
Clare Valley							
	Red	8130	6444	14573	$10,404,121	$23,467,178	100%
	White	5315	3605	8920	$4,014,607	$9,984,631	99%
	sum	13444	10049	23493	$14,418,728	$33,451,810	N/A
Coonawarra							
	Red	34124	10533	44656	$19,716,192	$81,236,177	99%
	White	7186	1282	8468	$1,506,231	$9,217,135	99%
	sum	41310	11815	53125	$21,222,423	$90,453,312	N/A
Eden Valley							
	Red	2403	2646	5049	$5,086,025	$9,473,914	100%
	White	3247	2835	6082	$3,613,073	$7,710,841	100%
	sum	5650	5481	11131	$8,699,098	$17,184,756	N/A

	total winery grown	total purchased	total crushed	estimated value of purchased grapes	estimated value of total crush	average reliability of estimated value
Fleurieu zone – other						
Red	1322	2773	4096	$4,816,380	$7,022,725	95%
White	618	352	970	$459,511	$1,184,974	96%
sum	1940	3126	5066	$5,275,891	$8,207,699	N/A
Langhorne Creek						
Red	17704	26658	44362	$39,320,663	$65,214,766	90%
White	2784	4163	6947	$4,850,734	$8,121,842	100%
sum	20489	30821	51309	$44,171,397	$73,336,608	N/A
Limestone Coast zone - other						
Red	3188	5184	8372	$8,173,775	$12,992,560	100%
White	1517	1057	2573	$1,379,899	$3,144,187	100%
sum	4704	6241	10945	$9,553,674	$16,136,747	N/A
McLaren Vale						
Red	10264	31841	42106	$58,640,428	$77,192,056	61%
White	2704	11063	13767	$13,451,450	$16,754,942	79%
sum	12968	42904	55872	$72,091,878	$93,946,998	N/A
Mount Lofty zone - other						
Red	492	3491	3983	$4,595,664	$5,251,299	95%
White	489	1492	1980	$1,322,509	$1,699,166	91%
sum	980	4983	5963	$5,918,173	$6,950,466	N/A
Padthaway						
Red	12813	7474	20287	$13,010,427	$34,111,873	84%
White	12884	2945	15829	$4,014,358	$19,624,426	53%
sum	25697	10419	36116	$17,024,785	$53,736,299	N/A

VINTAGE STATISTICS 2001 BY REGION - CONT.D

Table 1.5 continued

		total winery grown	*total purchased*	*total crushed*	*estimated value of purchased grapes*	*estimated value of total crush*	*average reliability of estimated value*
Riverland							
	Red	26768	170132	196900	$129,426,31	$149,662,53	98%
	White	26722	103482	130204	$52,149,782	$65,626,963	99%
	sum	53490	273614	327104	$181,576,09	$215,289,49	N/A
Wrattonbully							
	Red	9797	4989	14786	$7,805,631	$22,304,916	100%
	White	1087	299	1386	$299,127	$1,329,923	100%
	sum	10884	5289	16172	$8,104,758	$23,634,840	N/A
SA - other							
	Red	122	1752	1874	$1,827,830	$1,950,175	80%
	White	88	1115	1204	$500,342	$538,440	100%
	sum	211	2867	3078	$2,328,172	$2,488,616	N/A
Grand Total		209455	469365	678821	$482,380,81	$754,514,31	N/A

NUMBER OF GROWERS BY REGION AND PROPERTY SIZE

Table 1.6

	Property size in hectares					
REGION	**<10**	**10 - 24**	**25 - 49**	**>49**		**Total ha**
	Number of growers in each category				**Total**	
ADELAIDE HILLS	127	49	22	7	205	2476
BAROSSA + EDEN VALLEY	302	152	83	21	558	9313
BORDERTOWN	0	0	1	5	6	1022
CLARE VALLEY	122	49	17	18	206	4434
COONAWARRA	27	30	14	20	91	4957
FLEURIEU OTHER INC KI	25	7	6	2	40	593
LANGHORNE CREEK	21	34	18	21	94	4752
LIMESTONE COAST - OTHER	25	14	11	5	55	1515
MCLAREN VALE	207	71	43	16	337	5189
MOUNT LOFTY RANGES - OTHER	31	12	4	2	49	572
PADTHAWAY	3	4	6	12	25	3290
RIVERLAND	740	328	84	38	1190	18245
WRATTONBULLY	9	12	6	5	32	1347
SA OTHER	20	7	1	0	28	214
NUMBER OF GROWERS	**1659**	**769**	**316**	**172**	**2916**	
% OF TOTAL GROWERS	57%	26%	11%	6%	100%	
NUMBER OF HECTARES	**7777**	**11509**	**10092**	**28564**	**57942**	
% OF TOTAL HECTARES	13%	20%	17%	49%	100%	

PLANTINGS IN SA BY VARIETY - RED

Table 1.7

Year planted - area in hectares

Variety	Pre-97	1997	1998	1999	2000	Total	%planted in 2000
BARBERA	2	0	1	5	8	15	50%
CABERNET FRANC	227	3	16	27	4	276	1%
CABERNET SAUVIGNON	7745	2208	2700	1458	578	14689	4%
GRENACHE	1558	61	76	139	81	1915	4%
MALBEC	196	19	21	52	12	300	4%
MATARO	398	33	65	64	38	598	6%
MERLOT	1284	714	832	433	172	3435	5%
NEBBIOLO	3	1	6	27	7	43	15%
PETIT VERDOT	90	84	183	266	81	705	12%
PINOT NOIR	743	123	176	114	100	1257	8%
RUBY CABERNET	371	66	188	210	37	870	4%
SANGIOVESE	38	37	27	52	31	184	17%
SHIRAZ	9030	2057	3045	1830	774	16735	5%
TEMPRANILLO	0	0	7	11	11	29	37%
ZINFANDEL	1	3	1	11	5	22	24%
OTHER RED	183	10	9	10	18	230	8%
TOTAL RED WINEGRAPES	**21867**	**5420**	**7352**	**4709**	**1957**	**41305**	**5%**

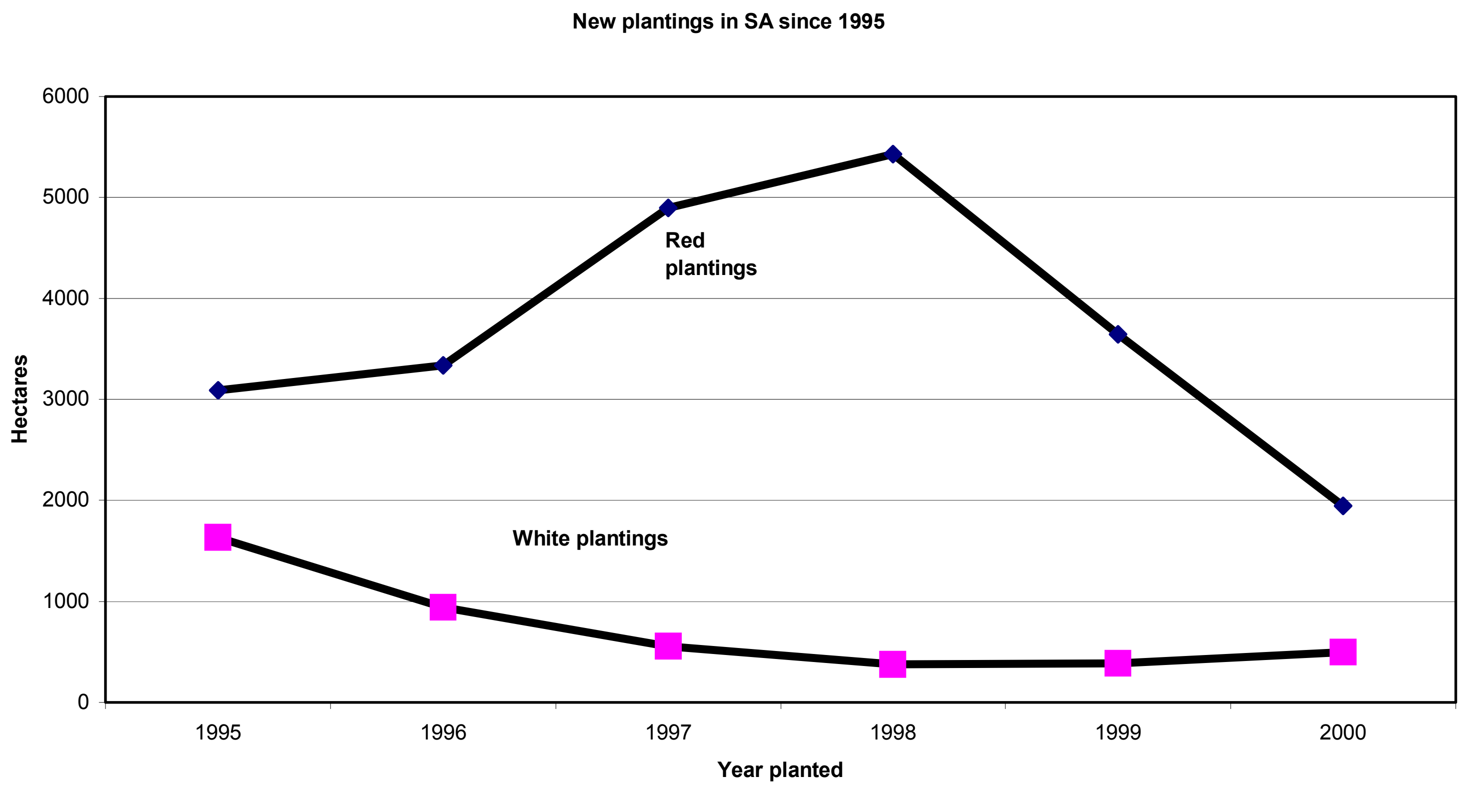
PLANTINGS IN SA BY VARIETY - WHITE

Table 1.8

Variety	Year planted - area in hectares						
	Pre-97	1997	1998	1999	2000	Total	% planted in 2000
CHARDONNAY	5606	246	149	99	136	6236	2%
CHENIN BLANC	341	1	4	1		348	0%
COLOMBARD	390	35	66	108	68	667	10%
DORADILLO	219	-	-	1	6	226	3%
MUSCAT BLANC	157	0	-	-	1	158	0%
MUSCAT GORDO BLANCO	1218	15	11	3	3	1250	0%
PALOMINO	108	-	-	-	-	108	0%
PEDRO XIMENES	111	-	-	-	-	111	0%
RIESLING	2189	11	52	99	92	2443	4%
SAUVIGNON BLANC	737	56	109	42	80	1023	8%
SEMILLON	1600	137	62	31	23	1852	1%
SULTANA	716	3	5	3	5	732	1%
TRAMINER	180	0	-	0	-	181	0%
VERDELHO	164	41	35	24	16	279	6%
VIOGNIER	24	16	20	47	51	158	32%
OTHER WHITE	399	21	25	33	23	501	5%
TOTAL WHITE WINEGRAPES	**14158**	**582**	**539**	**492**	**503**	**16274**	**3%**
TOTAL OTHER VARIETIES	**306**	**15**	**9**	**22**	**2**	**353**	**0%**
TOTAL ALL VARIETIES	**36361**	**6017**	**7894**	**5210**	**2450**	**57932**	**4%**

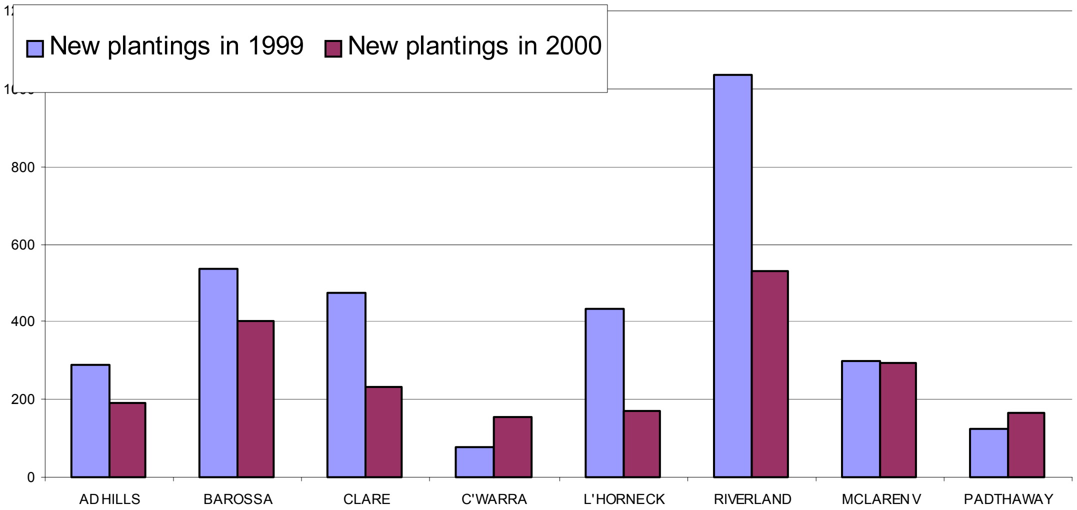
NEW PLANTINGS IN SOUTH AUSTRALIA SINCE 1995

Figure 1.7



NEW PLANTINGS BY REGION - 1999 VS 2000

Figure 1.8



ESTIMATED AREA REQUIRED TO MEET PROJECTED DEMAND IN 2006

Table 1.9

Region	*2006 demand (tonnes)*	*Av yield estimate (past three years)*	*Hectares required in 2006*	*Current hectares planted*	*Diff'ce**
Adelaide Hills	19002	11.69	1676	2476	800
Barossa and Eden Valley	99833	8.05	12189	9313	-2876
Clare Valley	35047	6.23	5352	4434	-918
Coonawarra	46136	8.87	4469	4957	488
Langhorne Creek	72869	11.72	5944	4752	-1192
L'stone Coast zone (ex C'warra)	73593	9.99	6790	7174	384
McLaren Vale	77883	12.70	5920	5189	-731
Mt Lofty other	5603	12.47	451	572	121
Riverland	400912	19.19	20809	18245	-2564

** A negative number indicates a shortfall; a positive number indicates a surplus*