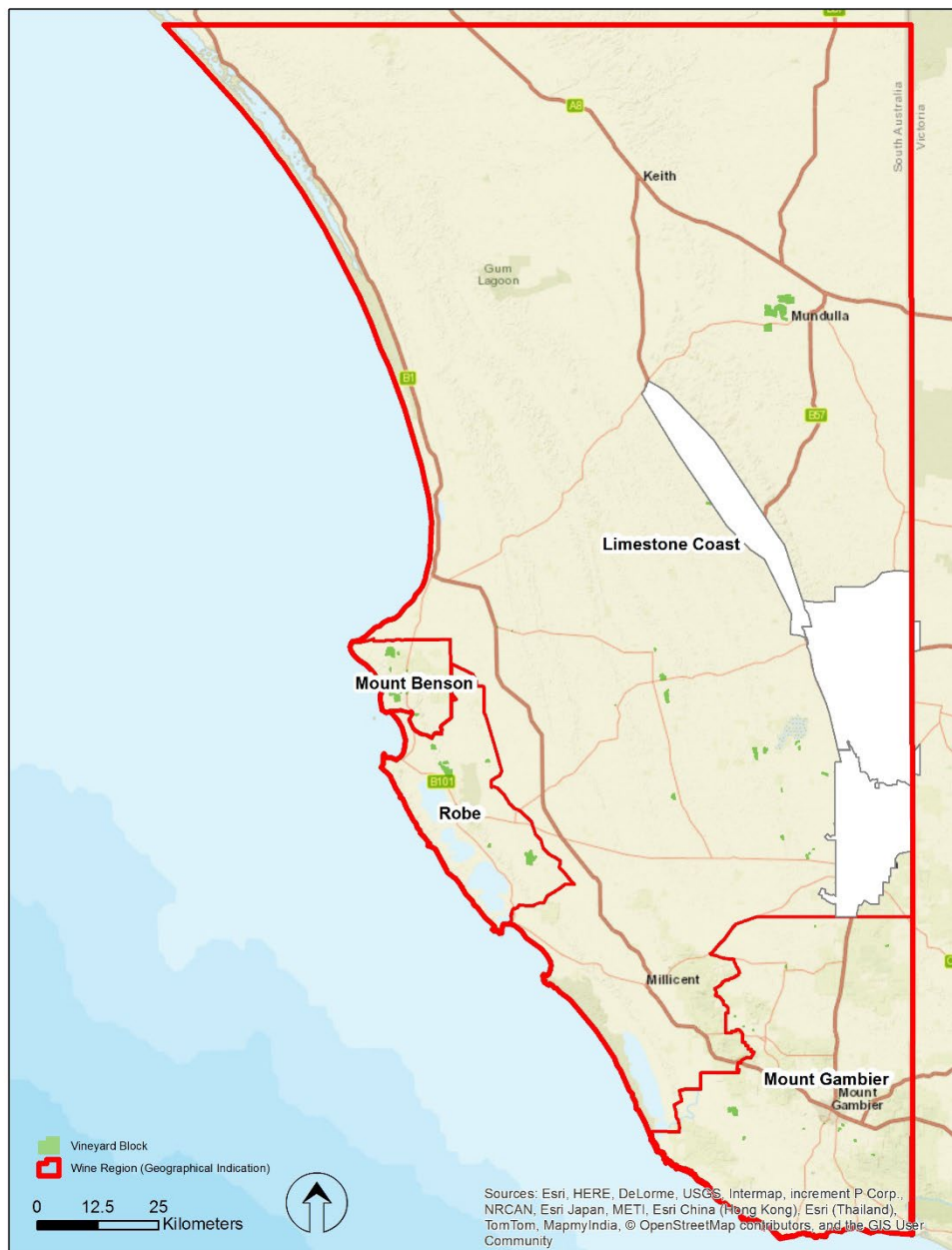


SA Winegrape Crush Survey

Regional Summary Report 2017

Limestone Coast Zone – other

Wine Australia July 2017



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 9th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

**Mount Benson, Robe, Mt Gambier,
and Limestone Coast other
Wine Regions**



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Limestone Coast zone - other

Vintage overview

Limestone Coast zone (other) includes the GI regions of Mt Benson, Mount Gambier and Robe, and the vineyards around Bordertown, Lucindale, and Beachport, as well as those near but outside the declared GI regions of Padthaway, Coonawarra and Wrattenbully. The total area of vines included in this definition is around 2,065 hectares.

Vintage report

2016 saw rainfall records crumble at Cape Jaffa, and the nearby weather station at Robe claims the highest annual rainfall since records commenced in the 1860's. Cool, wet winter soils coupled with a mild spring meant budburst was later than what we've come to expect. The whole growing season followed suit pushing ripening and harvest into cooler months. Most reds were not harvested until mid-late April and some of the heavier crops trailed into early May. With this later slower ripening period, both Shiraz and Cabernet achieved phenological flavour ripeness at much lower sugar levels than usual over the last two decades.

Yields in parts of Mount Benson were negatively impacted by severe winds before (and in some cases during) flowering. Sites further from the coast, those protected by the ranges and blocks with wind breaks will have fared better in terms of yield than the more exposed plots. Larger crops on the other hand take longer to ripen and with the intermittent rain and cool conditions, this season will see the best quality coming from those with modest crop levels, especially in the case of red varieties.

Based on the conditions, it will be the cooler Bordeaux varieties such as Cabernet Sauvignon and Sauvignon Blanc, plus Chardonnay and Pinot Gris that will really shine this year. Shiraz lacked the intensity of the previous few years but the better sites will still be very good.

Anna Hooper, Cape Jaffa Wines

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from the Limestone Coast zone (other) was 22,154 tonnes in 2017, compared with 20,667 tonnes in 2016.

The five-year average crush for this group of regions is 16,871 tonnes. The 2017 crush was the highest since 2008, while the 2015 crush of 10,248 tonnes was the lowest since the areas were combined in 2001.

The total estimated value of fruit from this area was \$17 million, down from \$20 million, due to a significant decline in the prices paid for fruit.

The average prices of all the major red varieties declined: Shiraz by 19% to \$850 per tonne, Cabernet Sauvignon by 25% to \$787 per tonne and Merlot by 11% to \$712 per tonne.

The price dispersion data shows that 78% of red tonnages were purchased at between \$600 and \$1500 and 17% between \$300 and \$600., while for the whites, 91% were purchased between \$600 and \$1500 and 9% between \$300 and \$600.

There were no changes to the plantings in these regions in 2016.

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Limestone Coast zone - other

Winegrape intake summary table

*Incorporates Mount Benson (1858 tonnes), Mt. Gambier (769 tonnes), Robe (1821 tonnes)
and Limestone Coast zone – other including Bordertown (17,706 tonnes)*

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Franc	56									261	82%	317	\$158,555
Cabernet Sauvignon	2024		17%	76%	7%		\$1,593,213	\$787	-25%	4647	70%	6671	\$5,025,121
Lagrein										11	100%	11	\$7,960
Malbec	114			100%			\$89,757	\$789	-21%	282	71%	396	\$312,236
Mataro/Mourvedre	392			100%			\$273,248	\$697	-24%	316	45%	708	\$493,354
Merlot	701		33%	67%			\$499,481	\$712	-11%	2385	77%	3087	\$2,151,741
Montepulciano	5											5	\$6,720
Petit Verdot	163		62%	38%			\$98,906	\$608	-35%	282	63%	445	\$270,182
Pinot Noir	321			100%			\$336,529	\$1,049	-6%	318	50%	639	\$530,815
Shiraz	2167		14%	79%	7%		\$1,843,042	\$850	-19%	4246	66%	6414	\$5,227,874
Tempranillo										42	100%	42	\$29,746
Red total	5943	0	17	78%	5%		\$4,768,857	\$802	-22%	12790	68%	18733	\$14,214,304
White													
Chardonnay	459		11%	89%			\$314,302	\$684	15%	1227	73%	1686	\$1,235,841
Marsanne	8											8	\$4,070
Muscat a Petit Grains Blanc	17											17	\$15,030
Pinot Gris/Grigio	90			100%			\$103,740	\$1,156	25%	18	17%	108	\$124,857
Sauvignon Blanc	939	0%	2%	98%			\$779,300	\$830	4%	438	32%	1376	\$1,147,288
Semillon	71	7%	93%				\$30,632	\$434	-28%	151	68%	222	\$168,403
Vermentino										5	100%	5	\$3,568
White total	1583	0%	9%	91%	0%	0%	\$1,247,074	\$788	4%	1838	54%	3422	\$2,699,057
Grand total	7526	0%	16%	80%	4%	0%	\$6,015,931	\$799	-17%	14628	66%	22154	\$16,913,361

Limestone Coast zone - other

Current plantings by variety and year planted

Mount Benson

Variety	Current area in hectares				Total	
	Pre-2014	2014	2015	2016 area	% planted in	2016
Cabernet Franc	3	0	0	0	3	0%
Cabernet Sauvignon	115	0	0	0	115	0%
Merlot	52	0	0	0	52	0%
Petit Verdot	2	0	0	0	2	0%
Pinot Noir	2	0	0	0	2	0%
Shiraz	167	0	0	0	167	0%
Chardonnay	38	0	0	0	38	0%
Other White	17	0	0	0	17	0%
Pinot Gris	42	0	0	0	42	0%
Sauvignon Blanc	67	0	0	0	67	0%
Total all varieties	504	0	0	0	504	0%

Mount Gambier

Variety	Current area in hectares				Total	
	Pre-2014	2014	2015	2016 area	% planted in	2016
Cabernet Sauvignon	10	0	0	0	10	0%
Merlot	1	0	0	0	1	0%
Pinot Noir	89	0	0	0	89	0%
Chardonnay	51	0	0	0	51	0%
Pinot Gris	27	0	0	0	27	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	117	0	0	0	117	0%
Semillon	1	0	0	0	1	0%
Viognier	1	0	0	0	1	0%
Total all varieties	303	0	0	0	303	0%

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

Robe

	Current area in hectares				Total area	% planted in 2016
Variety	Pre-2014	2014	2015	2016		
Red winegrapes						
Cabernet Sauvignon	226	9	0	0	235	0%
Malbec	2	0	0	0	2	0%
Merlot	58	0	0	0	58	0%
Other Red	3	0	0	0	3	0%
Pinot Noir	46	0	0	0	46	0%
Shiraz	171	0	0	0	171	0%
Total red varieties	506	9	0	0	515	0%
White winegrapes						
Chardonnay	76	0	0	0	76	0%
Pinot Gris	15	0	0	0	15	0%
Sauvignon Blanc	43	0	0	0	43	0%
Semillon	12	0	0	0	12	0%
Total white varieties	147	0	0	0	147	0%
Total all varieties	652	9	0	0	661	0%

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

Bordertown	Current area in hectares					% planted in 2016
	Pre-2014	2014	2015	2016	Total area	
Variety						
Red winegrapes						
Cabernet Franc	30	0	0	0	30	0%
Cabernet Sauvignon	415	0	0	0	415	0%
Malbec	21	0	0	0	21	0%
Mataro (Mourvedre)	43	0	0	0	43	0%
Merlot	219	0	0	0	219	0%
Other Red	19	0	0	0	19	0%
Petit Verdot	43	0	0	0	43	0%
Shiraz	337	0	0	0	337	0%
Total red varieties	1,126	0	0	0	1,126	0%
White winegrapes						
Chardonnay	88	0	0	0	88	0%
Other White	8	0	0	0	8	0%
Pinot Gris	12	0	0	0	12	0%
Sauvignon Blanc	8	0	0	0	8	0%
Semillon	7	0	0	0	7	0%
Verdelho	6	0	0	0	6	0%
Total white varieties	128	0	0	0	128	0%
Total all varieties	1,254	0	0	0	1,254	0%

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

Limestone Coast zone (other)

Variety	Current area in hectares				% planted in	
	Pre-2014	2014	2015	2016	Total area	2016
Red winegrapes						
Cabernet Franc	2	0	0	0	2	0%
Cabernet Sauvignon	344	0	0	0	344	0%
Merlot	45	0	0	0	45	0%
Petit Verdot	3	0	0	0	3	0%
Pinot Noir	10	0	0	0	10	0%
Shiraz	136	0	0	0	136	0%
Total red varieties	540	0	0	0	540	0%
White winegrapes						
Chardonnay	41	0	0	0	41	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	9	0	0	0	9	0%
Vermentino	2	0	0	0	2	0%
Total white varieties	57	0	0	0	57	0%
Total all varieties	597	0	0	0	597	0%

Source: Vinehealth Australia

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 Wine Australia.

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 are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 88%; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – 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 (May 2017).

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.

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. It should also be noted that in minor varieties there may sometimes be very few purchases contributing towards a calculated average purchase value.

Price dispersion data (shaded columns in Intake Summary tables)

All purchases for each variety are grouped into categories according to the price paid for that fruit. The tonnes in each category are converted into a percentage of the total tonnes purchased, giving an indication of what share of fruit was purchased in each price range category. The categories are given nominal titles of A to E for convenience but these do not correspond with grades used by any particular winery.

Estimated total value of all grapes

The estimated total value of all 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.

Explanations and definitions cont.d

PLANTING DATA

Source of planting data tables

Planting data is not collected by the 2017 Australian Wine Sector Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia.

Vinehealth Australia is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of vineyard owners in the state. Vineyard owners with plantings of 0.5 hectares or more are required to register with Vinehealth Australia, and provide details of any changes made to these vineyard plantings within three months of any such change. This information is kept strictly confidential.

Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from Vinehealth Australia.

For more information on registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2017 and include all plantings from the 2016 planting season.
2. Vines planted in a particular year may include top-worked 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 2017 report compared with previous reports.
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 slight variations between tables.

AUSTRALIAN WINE SECTOR SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian Wine Sector Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association, Wine Grape Growers South Australia and Primary Industries and Regions SA.

Maps and planting data tables provided by Brendan Tully, Vinehealth Australia.

The survey publication is available on Wine Australia's website wineaustralia.com, the Vinehealth Australia website vinehealth.com.au and via links from the Wine Grape Council SA website wgcsa.com.au and the South Australian Wine Industry Association website winesa.com.au

Disclaimer

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