

Prepared by:

**Wine
Australia**

On behalf of:



SOUTH AUSTRALIAN WINE INDUSTRY
ASSOCIATION INCORPORATED



**Wine Grape Council
South Australia**



Government of South Australia
Primary Industries and Regions SA

2016 South Australian Winegrape Crush Survey



ACKNOWLEDGEMENTS

This survey has been produced by Wine Australia on behalf of the South Australian Wine Industry Association, the Wine Grape Council of SA Inc and Primary Industries and Regions SA.

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 2016. 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. Vintage reports have been provided by the regional associations or local growers. Particular thanks for their assistance go to: Andrew Bryson, Chris Byrne, Tony Carapetis, James Freckleton, Richard Hamilton, James Hook, Anna Hooper, Lian Jaensch, Allen Jenkins, Louisa Rose and Nathan Shaw.

The survey publication is available through Winefacts 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

MAPS

Brendan Tully, Spatial Information Services Administrator – Vinehealth Australia.

COVER IMAGE

McLaren Vale vineyards picture by Tim Jones, courtesy Wine Australia.

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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:

Wine Australia

+618 8228 2000

information@wineaustralia.com

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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 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 90%; however, individual regions may vary. 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 2016).

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. Therefore the average price should not be compared directly with an individual grower's arrangement. 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.

PLANTING DATA

Source of planting data tables

Planting data is not collected by the 2016 Australian Wine Sector Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia (formerly the Phylloxera and Grape Industry Board of South Australia).

Vinehealth Australia 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 Vinehealth Australia, and to report details of their plantings on an annual basis. This information is kept strictly confidential.

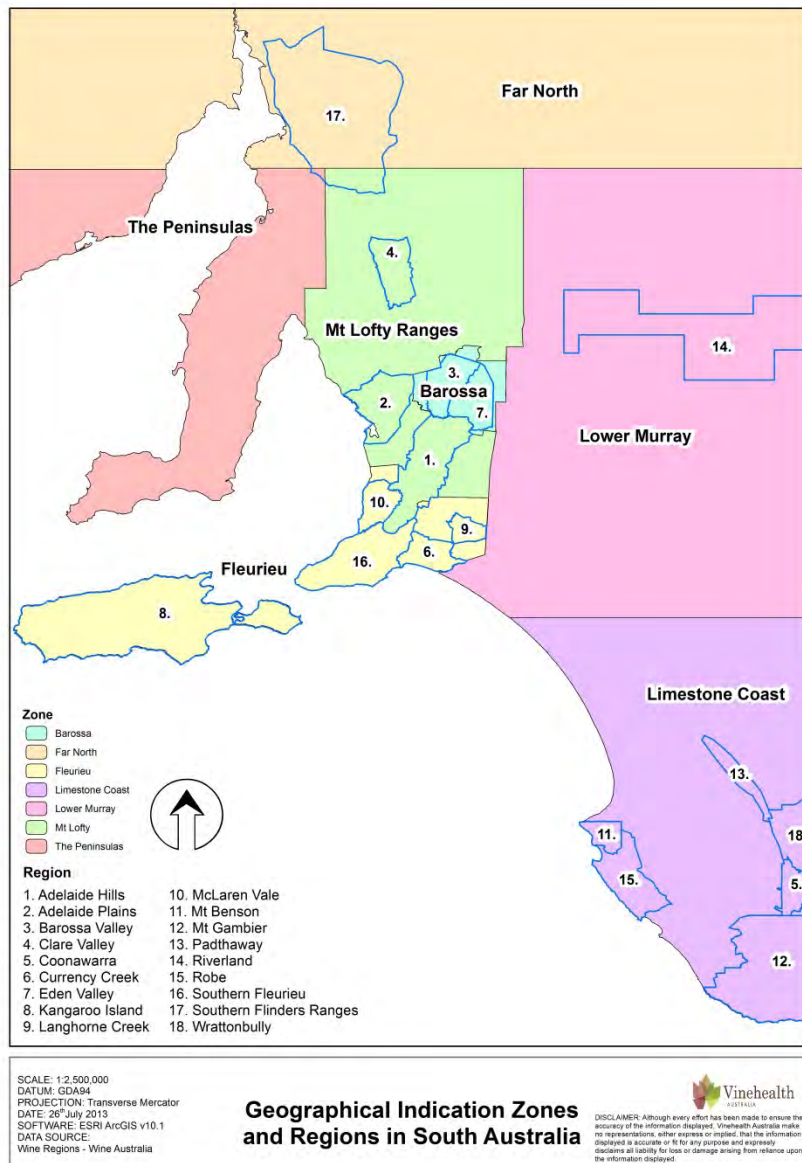
Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from Vinehealth Australia.

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 2016 and include all plantings from the 2015 planting season.
2. 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 2016 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 a slight error in totals or percentages.

SA Winegrape Crush Survey State Summary Report – 2016



State summary

Overview of Vintage Statistics 2016

State and Regional overview

The total reported crush of South Australian winegrapes in 2016 was 817,981 tonnes. This was an increase of 14% above the 2015 harvest of 716,592 tonnes. Nationally, there was an estimated non-response rate of 10.0%; however a specific non-response rate for South Australia is not known.

Over the previous five years (from 2011 – 2015), the average State production is 723,983 tonnes, with a low of 681,319 tonnes in 2013 and a high of 716,592 tonnes in 2015. The 2016 crush is up by 17% against the last five year average. It is the highest crush for the state since 2006.

The top three regions by volume in 2016 were the Riverland with 56% of the crush (456,988 tonnes), Langhorne Creek with 7.3% (60,119 tonnes) and the Barossa Valley with 6.6% (54,137 tonnes). Many regions had significant increases in tonnage, including Langhorne Creek (up by 54%), Padthaway (up by 77%), McLaren Vale (up by 44%) and Wrattontully (up by 43%). The Adelaide Hills had an increase of 21% in tonnes, and the Barossa Valley 23%, while the Clare Valley was up by 30%. The Riverland increased its production by 1% on the 2015 vintage

The total estimated value of the crush was \$581 million, up by \$134 million (32%) compared with 2015. The average purchase value per tonne across the state increased from \$557 in 2015 to \$631 per tonne.

Varietal overview

The red crush produced 496,463 tonnes, which was 17% higher than the 2015 crush (422,776 tonnes) and 14% above the five year average (435,732 tonnes); whilst the white crush production increased by 9% to 321,518 tonnes, which is 10% above the five year average (292,092 tonnes).

Shiraz was up by 30,000 tonnes (12.5%) and accounted for 48% (239,594 tonnes) of the red crush, with Cabernet Sauvignon second at 30% (149,976 tonnes – up by 36,000 tonnes) and Merlot third at 9% (45,384 tonnes).

Among the white varieties, Chardonnay was up by 20,000 tonnes and accounted for 52% (166,136 tonnes) of the white production, with Sauvignon Blanc (11%) next and Colombard dropping by 5,000 tonnes and slipping from 11% to 8% of the white crush. Pinot Gris/Pinot Grigio increased by nearly 4,000 tonnes – a 40% increase.

Note: changes to the methodology for the survey collection in 2015 mean that direct comparisons of tonnages and prices with previous years should be interpreted with caution.

Vineyard plantings

Planting data derived from the Vinehealth Australia¹ vineyard register shows that there were 75,858 hectares planted to vines in South Australia as at 30 April 2016. This represents a decrease of 260 hectares since 2015. Although there have been net decreases in the previous four years in total planted area, the current area planted is 6,000 hectares higher than it was in 2004.

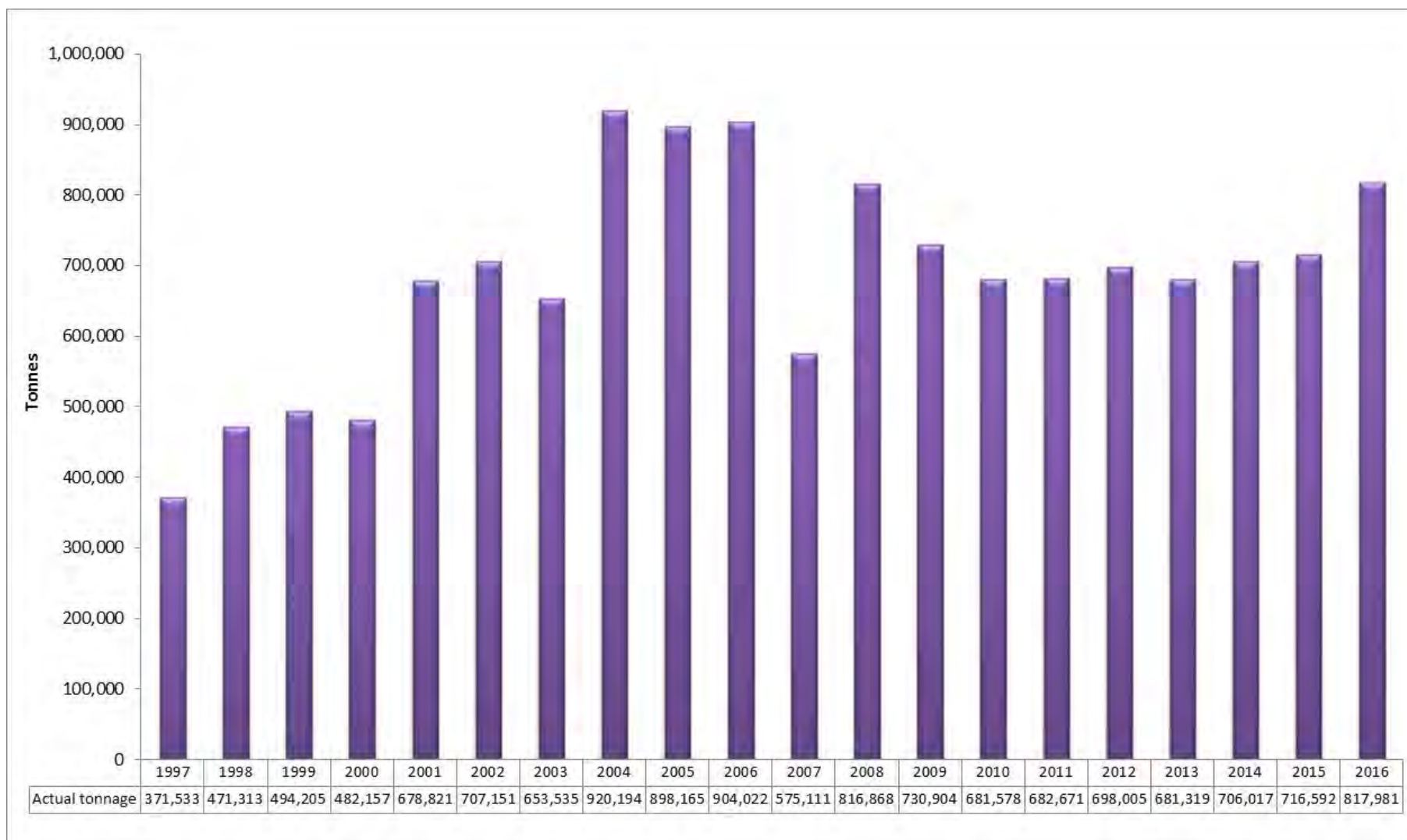
There was a total of 462 hectares (<1% of the total area) planted in spring 2015 (including top-working and replacements) compared with 864 hectares planted in the 2014-15 season. Of the new plantings, red varieties accounted for 86% compared with white varieties at 10% and tablegrapes at 4%. 50% of new plantings were Shiraz (231 ha) and 27% were Cabernet Sauvignon (231 ha).

There was a total of 3,394 growers registered with the Board as at 30 April 2016. This was slightly fewer than at the same time last year. 2,013 growers (59%) have properties smaller than 10 hectares and account for 11% of the total vineyard area, while 128 growers (4%) have properties larger than 100 hectares (in the same region) and account for 40% of the vineyard area.

¹ formerly Phylloxera and Grape Industry Board of SA

State summary

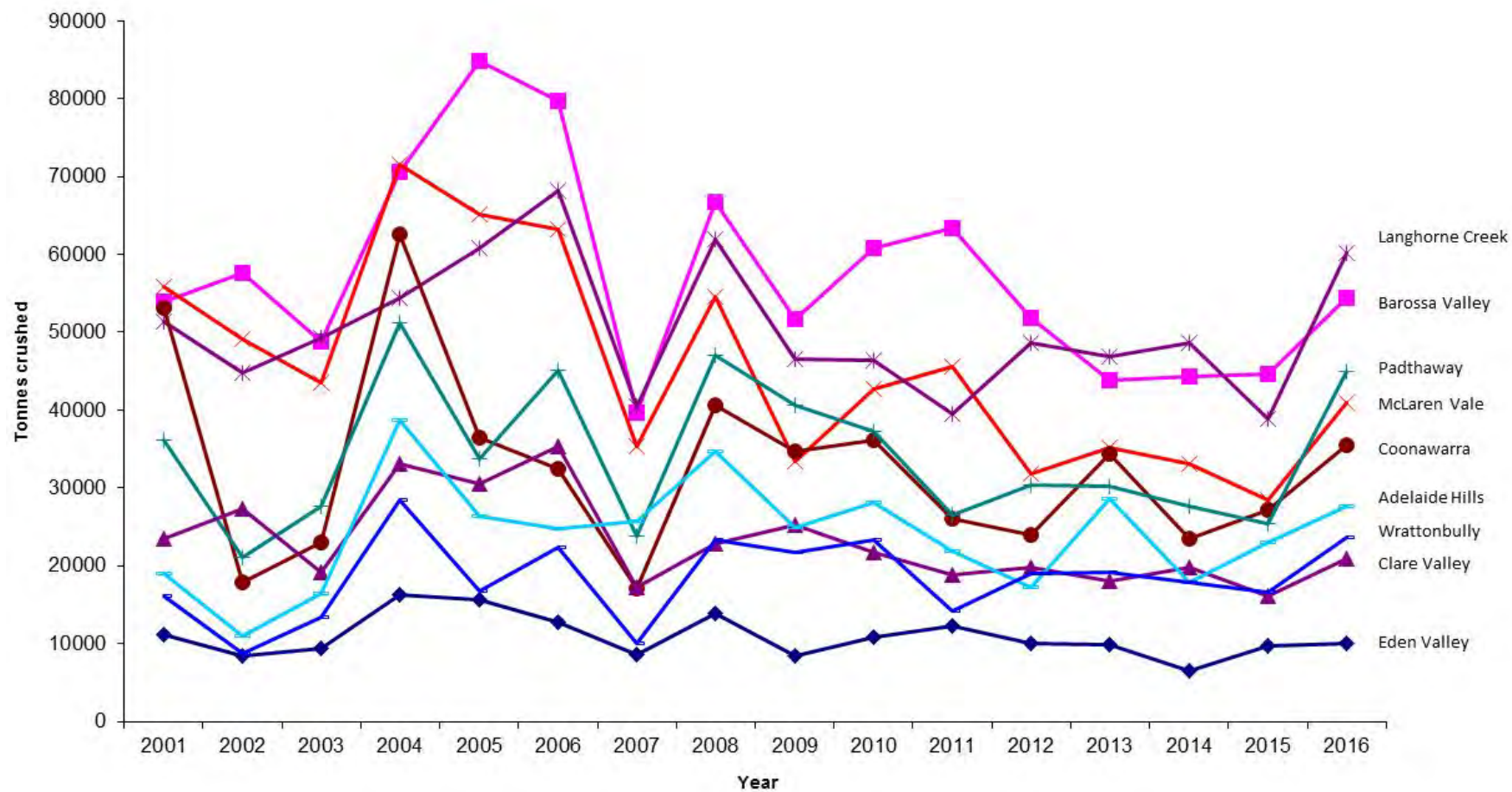
Historical winegrape crush South Australia 1997 - 2016



State summary

Vintage by region 2001 - 2016

Not including the Riverland due to scale differences



State summary

Total crush by GI region 2016 vs 2015

GI region	Winery grown (tonnes)	Purchased (tonnes)	Tonnes crushed 2016	Region % of state crush	Tonnes crushed 2015	% difference 2016 vs 2015
Adelaide Hills	6,694	20,976	27,670	3.4%	22,943	21%
Adelaide Plains	165	4,231	4,396	0.5%	3,091	42%
Barossa Valley	21,151	32,737	53,888	6.6%	43,889	23%
Barossa - Other	369	114	483	0.1%	817	-41%
Clare Valley	10,735	10,059	20,795	2.5%	16,039	30%
Coonawarra	23,564	11,933	35,497	4.3%	27,137	31%
Currency Creek	6,581	3,588	10,169	1.2%	7,595	34%
Eden Valley	5,323	4,669	9,991	1.2%	9,658	3%
Far North - Other	32	-	32	0.0%	-	
Fleurieu - Other	369	2,181	2,549	0.3%	2,238	14%
Kangaroo Island	114	49	162	0.0%	146	11%
Langhorne Creek	26,579	33,540	60,119	7.3%	38,921	54%
Limestone Coast - Other	9,877	4,911	14,788	1.8%	10,248	44%
Lower Murray - Other	385	2,834	3,219	0.4%	1,807	78%
McLaren Vale	15,381	25,616	40,997	5.0%	28,434	44%
Mount Benson	128	2,198	2,326	0.3%	1,674	39%
Mount Gambier	-	945	945	0.1%	594	59%
Mount Lofty Ranges - Other	87	111	198	0.0%	1,250	-84%
Padthaway	16,225	28,698	44,922	5.5%	25,351	77%
Riverland	88,241	368,747	456,988	55.9%	454,202	1%
Robe	1,981	628	2,609	0.3%	1,811	44%
Southern Fleurieu	9	362	371	0.0%	1,219	-70%
Southern Flinders Ranges	361	563	924	0.1%	842	10%
The Peninsulas	42	295	337	0.0%	130	159%
Wrattonbully	12,695	10,911	23,606	2.9%	16,557	43%
Total all regions	247,087	570,894	817,981	100%	716,592	14%

State summary

Vintage summary by region 2016

Region	Colour	Total Winery Grown	Total Purchased	Total Crushed	Estimated Value of Purchased Grapes	Estimated Value of Total Crush
Adelaide Hills	Red	1,565	6,470	8,036	9,764,083	\$12,365,748
	White	5,129	14,506	19,634	\$18,522,923	\$25,144,260
	All	6,694	20,976	27,670	\$28,287,006	\$37,510,008
Adelaide Plains	Red	72	3,225	3,296	\$3,072,166	\$3,141,189
	White	93	1,006	1,099	\$813,339	\$888,759
	All	165	4,231	4,396	\$3,885,505	\$4,029,948
Barossa Valley	Red	19,766	27,541	47,307	\$55,535,331	\$96,859,100
	White	1,755	5,310	7,064	\$3,993,400	\$5,342,442
	All	21,521	32,851	54,371	\$59,528,730	\$102,201,542
Clare Valley	Red	6,971	5,806	12,778	\$7,421,016	\$16,193,866
	White	3,764	4,253	8,017	\$4,155,900	\$7,849,702
	All	10,735	10,059	20,795	\$11,576,916	\$24,043,568
Coonawarra	Red	19,653	11,393	31,046	\$16,916,411	\$44,601,578
	White	3,912	540	4,452	\$320,427	\$2,766,769
	All	23,564	11,933	35,497	\$17,236,838	\$47,368,347
Currency Creek	Red	4,196	2,958	7,154	\$2,619,628	\$6,324,904
	White	2,385	630	3,015	\$454,143	\$2,190,413
	All	6,581	3,588	10,169	\$3,073,771	\$8,515,317
Eden Valley	Red	1,774	2,233	4,007	\$4,826,543	\$8,677,981
	White	3,549	2,436	5,985	\$3,185,558	\$8,236,438
	All	5,323	4,669	9,991	\$8,012,101	\$16,914,419
Fleurieu - other	Red	124	993	1,117	\$1,114,115	\$1,253,751
	White	367	1,599	1,966	\$1,092,895	\$1,356,761
	All	491	2,592	3,083	\$2,207,011	\$2,610,517

State summary

Vintage summary by region 2016

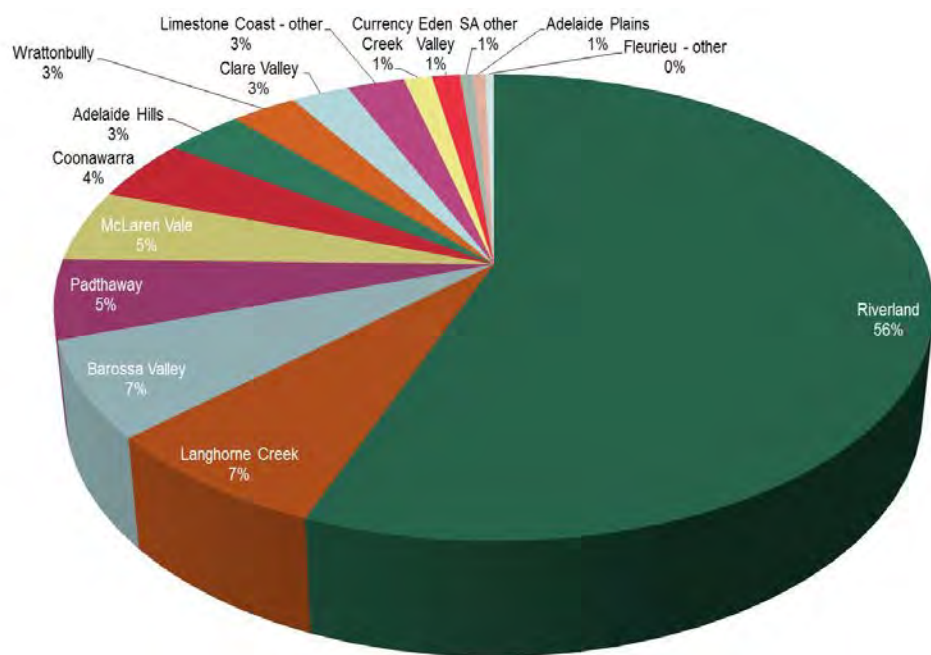
Region	Colour	Total Winery Grown	Total Purchased	Total Crushed	Estimated Value of Purchased Grapes	Estimated Value of Total Crush
Langhorne Creek	Red	21,856	27,417	49,272	\$22,106,776	\$39,458,882
	White	4,724	6,123	10,847	\$3,583,708	\$6,414,979
	All	26,579	33,540	60,119	\$25,690,484	\$45,873,861
Limestone Coast - other	Red	9,857	6,579	16,436	\$6,739,574	\$16,528,774
	White	2,128	2,103	4,231	\$1,586,022	\$2,931,931
	All	11,985	8,682	20,667	\$8,325,596	\$19,460,705
McLaren Vale	Red	14,088	22,742	36,830	\$38,561,513	\$62,264,470
	White	1,293	2,874	4,167	\$2,334,900	\$3,447,194
	All	15,381	25,616	40,997	\$40,896,413	\$65,711,664
Padthaway	Red	8,430	15,585	24,015	\$15,831,625	\$24,286,777
	White	7,794	13,113	20,907	\$8,680,330	\$14,064,992
	All	16,225	28,698	44,922	\$24,511,955	\$38,351,769
Riverland	Red	53,828	180,102	233,930	\$61,537,779	\$79,953,719
	White	34,414	188,645	223,058	\$52,893,985	\$62,689,274
	All	88,241	368,747	456,988	\$114,431,764	\$142,642,992
SA other	Red	833	2,516	3,349	\$1,822,247	\$2,432,229
	White	73	1,287	1,360	\$392,287	\$414,798
	All	906	3,803	4,709	\$2,214,535	\$2,847,027
Wrattonbully	Red	9,430	8,461	17,891	\$8,941,039	\$18,548,999
	White	3,266	2,450	5,716	\$1,643,293	\$4,150,459
	All	12,695	10,911	23,606	\$10,584,331	\$22,699,457
All winegrapes	All	247,087	570,894	817,981	\$360,462,955	\$580,781,138

Note: The 'estimated value of total crush' is the value estimate from the tonnage and total price paid for all varieties in each region

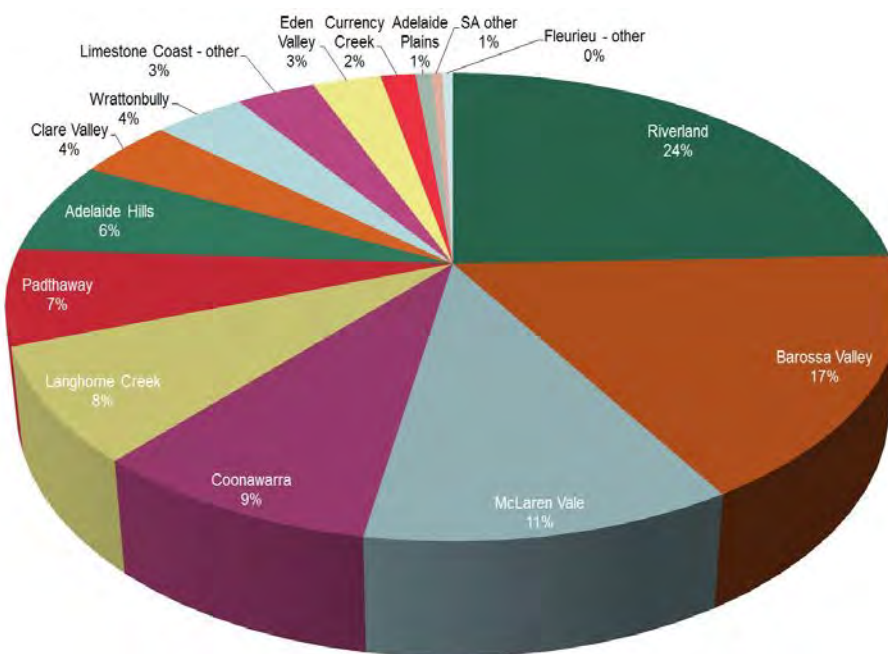
State summary

Crush by region volume vs value share 2016

Volume share



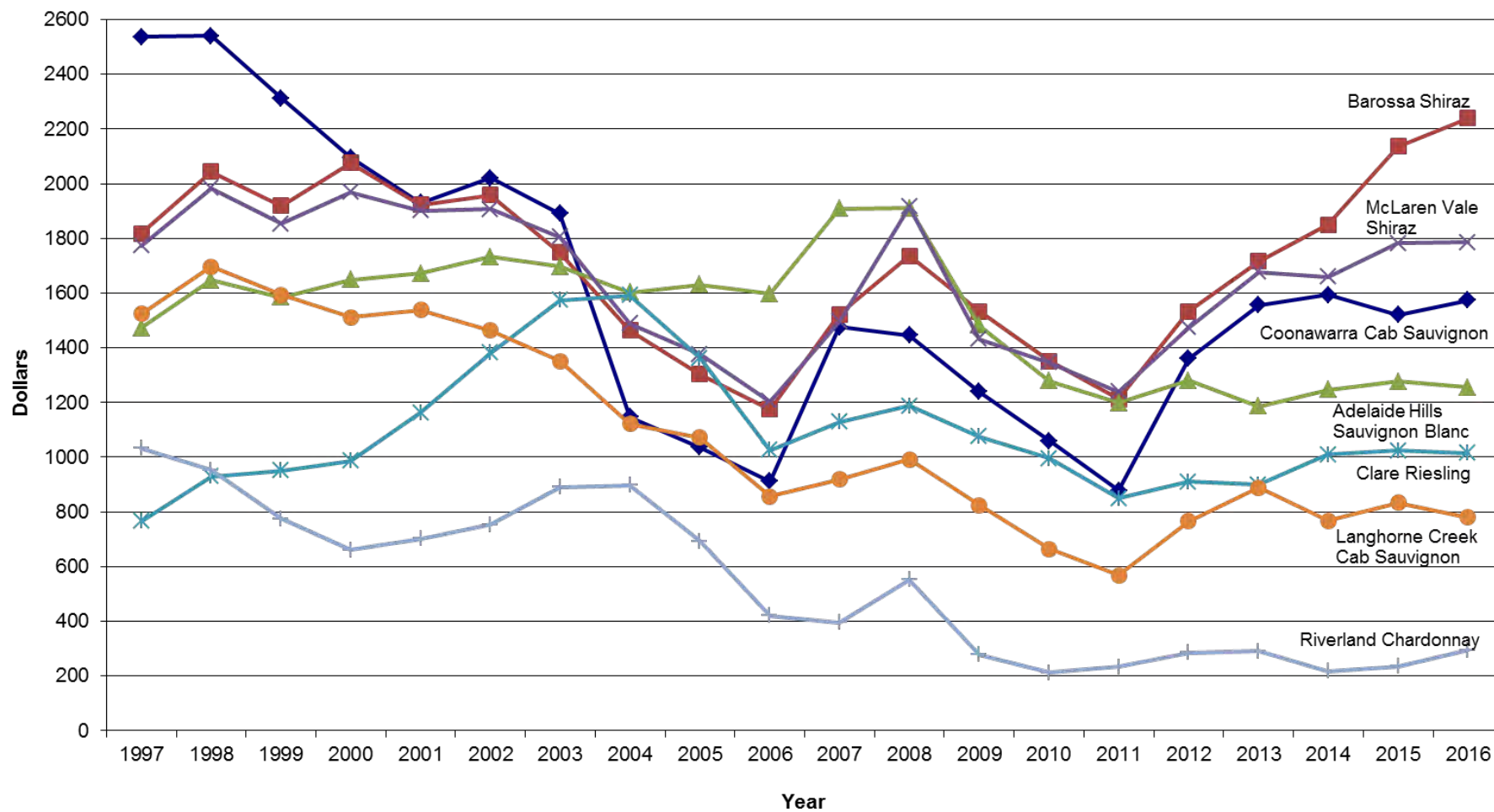
Value share



State summary

Historical weighted average prices – 1997-2016

Major variety-region combinations



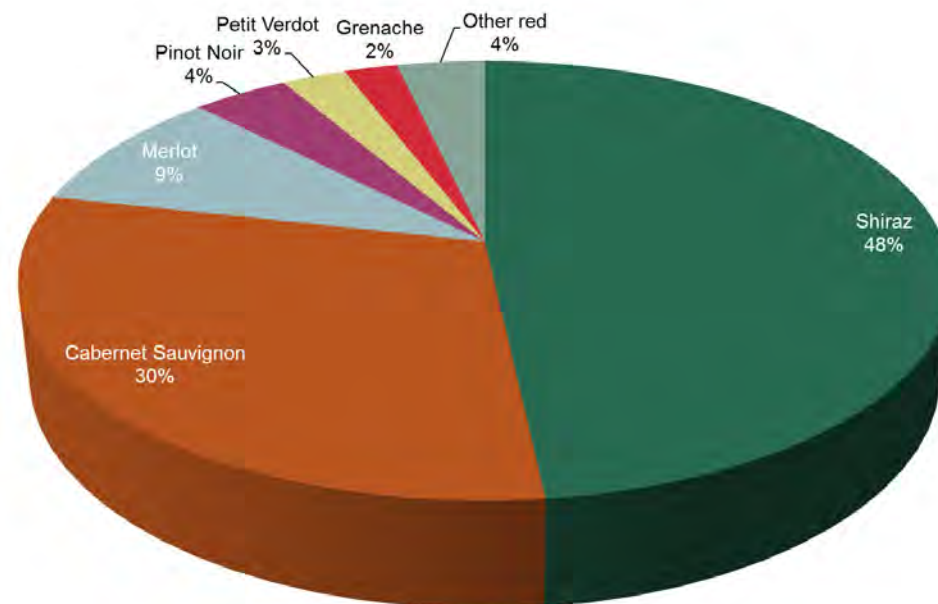
State summary

Vintage summary by variety 2016

Red winegrapes

Variety	Total Winery Grown	Total Purchased	Total Crushed	Purchased fruit as % of total
Barbera	22	98	120	82%
Cabernet Franc	535	282	818	35%
Cabernet Sauvignon	54,998	94,978	149,976	63%
Dolcetto	7	108	115	94%
Durif	189	313	502	62%
Grenache	3,912	6,952	10,864	64%
Lagrein	-	90	90	100%
Malbec	1,449	1,524	2,973	51%
Mataro	1,063	3,147	4,209	75%
Merlot	17,082	28,302	45,384	62%
Muscat a Petit Grains Rouge/Rose	2	189	191	99%
Nero D'Avola	74	58	131	44%
Petit Verdot	5,406	7,723	13,129	59%
Pinot Noir	5,058	14,493	19,551	74%
Ruby Cabernet	1,652	1,539	3,191	48%
Sangiovese	818	735	1,552	47%
Shiraz	78,615	160,979	239,594	67%
Tempranillo	614	1,416	2,030	70%
Other red	946	1,097	2,043	54%
Total Red winegrapes	172,443	324,020	496,463	65%

Share of tonnes crushed by variety - red



There is an estimated non-response rate of 10% across the state.

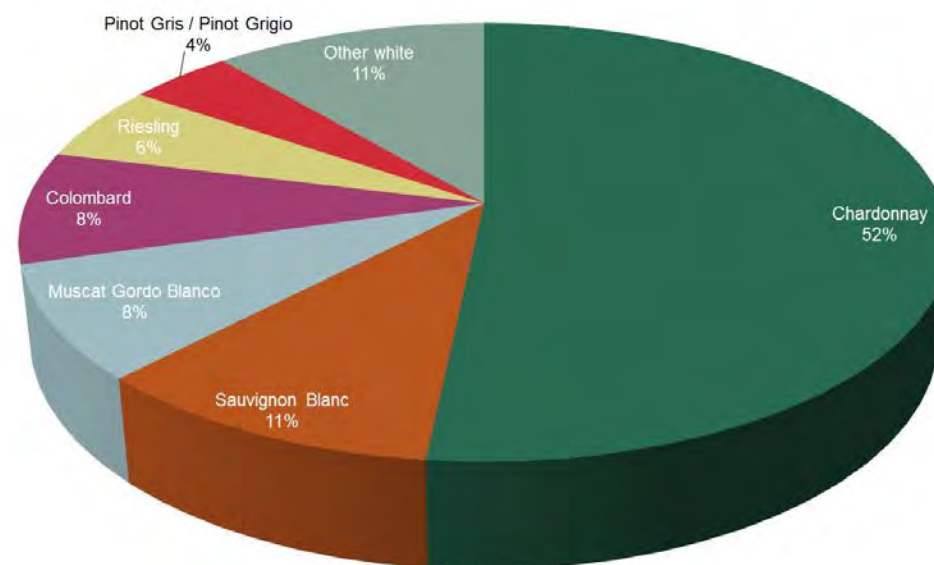
State summary

Vintage summary by variety 2016

White winegrapes

Variety	Total Winery Grown	Total Purchased	Total Crushed	Purchased fruit as % of total crush
Chardonnay	31,057	135,078	166,136	81%
Chenin blanc	39	2,003	2,042	98%
Colombard	2,653	23,991	26,644	90%
Doradillo	949	79	1,028	8%
Marsanne	65	64	129	49%
Muscadelle	36	23	59	39%
Muscat a Petit Grains Blanc	1,007	4,354	5,362	81%
Muscat Gordo Blanco	3,706	23,202	26,908	86%
Palomino and Pedro Ximenes	170	22	192	11%
Pinot Gris and Pinot Grigio	4,993	8,674	13,667	63%
Riesling	10,010	8,130	18,140	45%
Sauvignon Blanc	9,597	24,299	33,895	72%
Semillon	6,391	7,093	13,484	53%
Sultana	-	244	244	100%
Traminer	1,353	3,050	4,403	69%
Verdelho	425	2,516	2,941	86%
Viognier	1,312	2,144	3,456	62%
Other white	879	1,909	2,788	68%
Total white winegrapes	74,644	246,874	321,518	77%

Share of tonnes crushed by variety - white



There is an estimated non-response rate of 10% across the state.

State summary

Current plantings by variety and year planted 2016

Source: Vinehealth Australia

Variety	Current area in hectares					% planted in 2015
	Pre-2013	2013	2014	2015	Total area	
White winegrapes						
Chardonnay	9,238	19	9	13	9,279	0%
Riesling	2,539	3	10	12	2,564	0%
Sauvignon Blanc	2,496	4	2	0	2,502	0%
Semillon	1,095	0	0	0	1,095	0%
Muscat Gordo Blanco	1,021	10	4	3	1,038	0%
Pinot Gris	930	4	21	12	967	1%
Colombard	819	0	0	0	819	0%
Viognier	406	1	0	0	406	0%
Traminer (Gewurztraminer)	252	2	1	0	255	0%
Muscat A Petit Grains Blanc (White Frontignac)	215	8	1	0	224	0%
Verdelho	203	0	0	0	203	0%
Sultana	150	0	0	0	150	0%
Chenin Blanc	133	0	0	0	133	0%
Doradillo	72	0	0	0	72	0%
Vermentino	47	2	2	0	51	0%
Fiano	40	2	0	0	43	0%
Savagnin	40	0	0	0	40	0%
Palomino	30	0	0	0	30	0%
Marsanne	29	1	0	0	30	0%
Muscadelle (Tokay)	28	0	0	0	28	0%
Roussanne	23	0	0	0	23	1%
Pedro Ximenez	20	0	0	0	20	0%
Trebbiano	17	0	0	0	17	0%
Other White	110	8	4	6	127	4%
Total white varieties	19,951	64	55	46	20,116	0%

State summary

Variety	Current area in hectares					% planted in 2015
	Pre-2013	2013	2014	2015	Total area	
Red winegrapes						
Shiraz	25,682	337	434	231	26,683	1%
Cabernet Sauvignon	16,571	290	294	124	17,280	1%
Merlot	4,029	23	4	12	4,068	0%
Grenache	1,678	9	5	1	1,692	0%
Pinot Noir	1,651	6	12	4	1,673	0%
Petit Verdot	702	0	2	0	704	0%
Mataro (Mourvedre)	662	24	11	5	700	1%
Malbec	321	9	23	3	357	1%
Tempranillo	306	12	7	5	330	1%
Sangiovese	198	0	0	0	198	0%
Cabernet Franc	174	1	1	0	176	0%
Ruby Cabernet	148	0	0	0	148	0%
Durif (Petite Sirah)	36	3	0	6	45	14%
Montepulciano	32	4	7	0	44	1%
Meunier (Pinot Meunier)	35	0	0	5	40	12%
Touriga	35	2	1	0	37	0%
Nebbiolo	37	0	0	0	37	0%
Barbera	28	2	2	0	32	0%
Zinfandel	30	0	0	1	30	2%
Sagrantino	11	0	0	1	12	8%
Other Red	235	40	6	1	282	0%
Total red varieties	52,601	761	808	399	54,568	1%
Unknown variety	971	0	0	0	971	0%
Rootstock	37	0	0	0	37	0%
Germplasm	4	0	0	0	4	0%
Multi-purpose	94	0	0	0	94	0%
Table grapes	47	0	1	17	66	2%
Total all varieties	73,706	825	864	462	75,858	1%

State summary

Current plantings by region and year planted 2016

Zone	Region	Current area in hectares				Total area	% planted in 2015
		Pre-2013	2013	2014	2015		
Barossa	Barossa Valley	10,559	211	242	124	11,136	1%
	Barossa zone - other	236	0	0	0	236	0%
	Eden Valley	2,219	27	17	16	2,280	1%
	Total for Barossa	13,014	238	259	140	13,651	1%
Far North	Southern Flinders Ranges	210	0	0	0	210	0%
	Total for Far North	210	0	0	0	210	0%
Fleurieu	Currency Creek	944	0	17	0	961	0%
	Fleurieu zone - other	311	4	1	0	315	0%
	Kangaroo Island	135	0	0	0	135	0%
	Langhorne Creek	5,691	30	57	21	5,798	0%
	McLaren Vale	7,088	99	123	43	7,353	1%
	Southern Fleurieu	490	6	0	0	496	0%
	Total for Fleurieu	14,659	138	197	63	15,058	0%
Limestone Coast	Bordertown	1,254	0	0	0	1,254	0%
	Coonawarra	5,446	118	182	77	5,823	1%
	Limestone Coast zone - other	597	0	0	0	597	0%
	Mount Benson	504	0	0	0	504	0%
	Mount Gambier	292	0	0	0	292	0%
	Padthaway	3,922	48	41	8	4,019	0%
	Robe	756	3	9	0	768	0%
	Wrattenbully	2,649	6	12	6	2,673	0%
	Total for Limestone Coast	15,420	175	245	91	15,930	1%
Lower Murray	Lower Murray zone - other	427	1	0	3	431	1%
	Riverland	20,214	161	105	128	20,608	1%
	Total for Lower Murray	20,641	161	106	131	21,039	1%
Mount Lofty Ranges	Adelaide Hills	3,747	37	22	13	3,818	0%
	Adelaide Plains	513	2	0	0	515	0%
	Clare Valley	5,100	62	31	23	5,216	0%
	Mount Lofty Ranges zone - other	332	12	5	0	350	0%
	Total for Mount Lofty Ranges	9,692	113	57	36	9,899	0%
The Peninsulas	The Peninsulas	70	0	0	0	71	0%
	Total for The Peninsulas	70	0	0	0	71	0%
	Total for all GIs	73,706	825	865	462	75,858	1%

Source: Vinehealth Australia

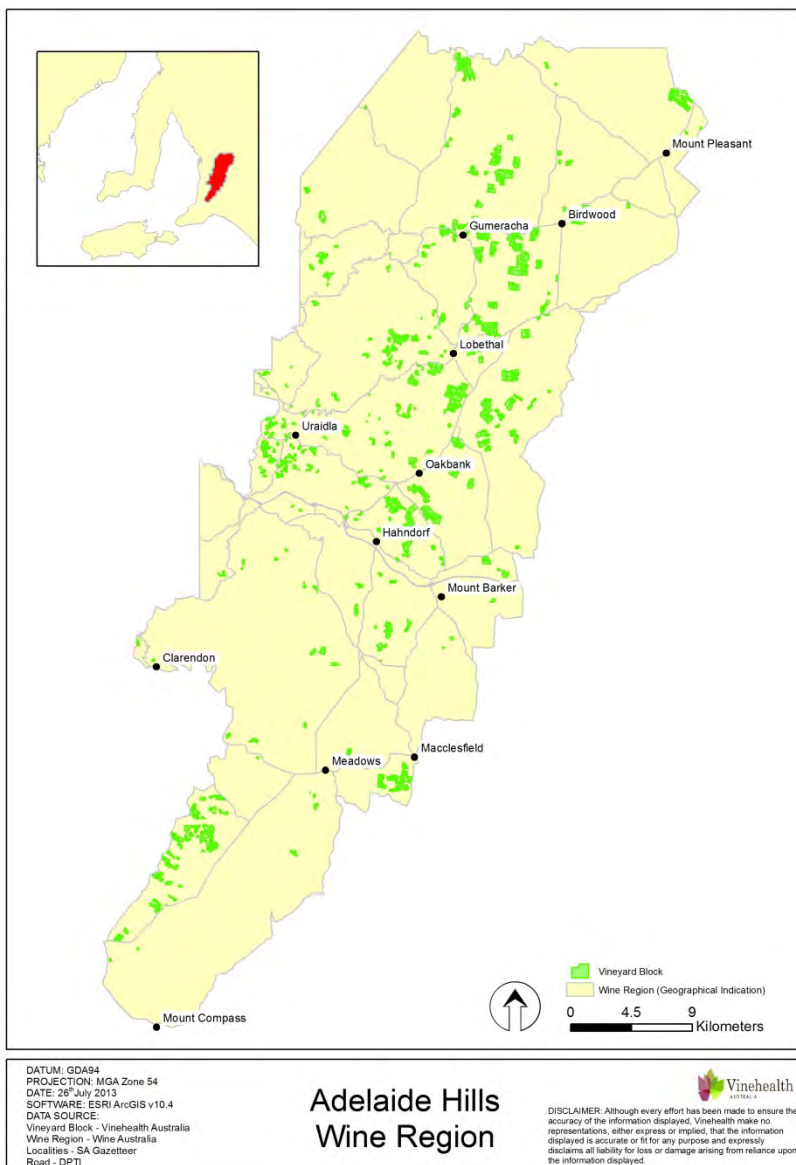
State summary

Number of growers by region and property size 2016

Source: Vinehealth Australia

		Property size in hectares											
		<10 ha		10-24 ha		25-49 ha		50-99 ha		+100 ha		Total	
Zone	Region	Area (ha)	# of growers	Area (ha)	# of growers	Area (ha)	# of growers	Area (ha)	# of growers	Area (ha)	# of growers	Area (ha)	# of growers
Barossa	Barossa Valley	1,329	337	2,337	150	2,355	69	1,277	20	3,847	16	11,145	592
	Barossa zone - other	15	3	12	1	0	0	84	1	126	1	236	6
	Eden Valley	368	89	494	34	311	10	446	6	667	3	2,286	142
Far North	Southern Flinders	18	5	139	8	0	0	53	1	0	0	210	14
Fleurieu	Currency Creek	62	12	162	11	193	5	0	0	544	2	961	30
	Fleurieu zone - other	22	7	60	4	0	0	234	3	0	0	315	14
	Kangaroo Island	112	19	23	2	0	0	0	0	0	0	135	21
	Langhorne Creek	119	23	297	18	991	28	1,148	17	3,249	11	5,804	97
	McLaren Vale	1,520	360	1,768	112	1,416	43	1,404	19	1,245	6	7,354	540
	Southern Fleurieu	109	34	92	7	228	6	68	1	0	0	496	48
Limestone Coast	Bordertown	0	0	0	0	39	1	0	0	1,215	4	1,254	5
	Coonawarra	286	53	489	32	672	19	859	13	3,517	12	5,823	129
	Limestone Coast	61	14	30	2	59	2	202	3	244	2	597	23
	Mount Benson	28	5	78	5	155	5	114	2	129	1	504	18
	Mount Gambier	56	14	36	3	106	3	94	1	0	0	292	21
	Padthaway	9	1	76	5	329	9	638	9	2,967	13	4,019	37
	Robe	18	2	83	4	81	2	210	3	377	2	768	13
	Wrattonbully	86	15	333	19	550	15	330	4	1,375	6	2,673	59
Lower Murray	Lower Murray zone -	67	15	177	9	187	6	0	0	0	0	431	30
	Riverland	2,781	562	4,354	275	3,087	90	2,245	31	8,144	36	20,612	994
Mount Lofty Ranges	Adelaide Hills	709	187	971	59	1,051	30	737	11	366	3	3,834	290
	Adelaide Plains	126	44	107	9	81	2	201	3	0	0	515	58
	Clare Valley	651	178	794	47	833	23	939	13	2,001	10	5,218	271
	Mount Lofty Ranges	103	30	47	3	108	3	93	1	0	0	350	37
The Peninsulas	The Peninsulas	17	4	21	2	33	1	0	0	0	0	71	7
Totals by size category		8,670	2,013	12,979	821	12,866	372	11,375	162	30,013	128		
Totals for SA												75,903	3,394

Note - grapegrowers can have vineyards in multiple regions – therefore the total number of growers counted by region may be higher than the actual number of registered growers.



SA Winegrape Crush Survey Regional Summary Report – 2016

Adelaide Hills Wine Region

ADELAIDE HILLS

Vintage overview

Vintage report

A warm dry spring resulted in yet another early start to vine growth. Fortunately, cold conditions in August and September delayed budburst slightly. However, despite these conditions, the earliest flowering Chardonnay (in late October) was recorded for the third season in a row and there were signs of Cabernet Sauvignon flowering in late October for the first time on record.

In response to the continuing dry conditions the majority of growers began irrigating early to ensure good canopy growth. Good set conditions, combined with excellent flower development, resulted in average to above average crop potential across the region.

The generally dry conditions meant that fungal disease pressure was very low for the season. The hot dry conditions in December delayed development of powdery mildew in blocks that were inadequately protected and as a result there were few reports of crop loss to powdery mildew.

A late frost (November 27) caused small, but significant losses to some growers. December 2015 was the hottest on record for Lenswood and the equal-eighth hottest for Woodside (Data from 1863 -87, and 1926 to the present).

Three rain events from late January to early February caused little damage, as vines were only in the early stages of veraison. The rainfall and cooler conditions which continued through into February resulted in excellent conditions for flavour development and acid retention. There were small pockets of *Botrytis* but continued good ripening conditions ensured that there was little impact.

Harvest began early with higher than average crops but with good sugar-acid balance and well developed flavour. Continuing cool conditions, together with higher than average crop loads resulted in a long vintage, with the last of the reds being harvested in early April.

Vintage 2016 will be remembered for grape and wine quality as well as a feeling of relief as the hot and dry conditions experienced earlier in the season did not persist.

Richard Hamilton - Adelaide Hills Wine

Overview of vintage statistics

A total of 27,670 tonnes of Adelaide Hills winegrapes were crushed in 2016, up from 22,943 tonnes in 2015 and 17,873 tonnes in 2014. Over the past five years, the average crush for the Adelaide Hills is 22,864 tonnes implying that 2016 yields were higher than average. The minimum crush over the period was 17,276 tonnes in 2012 with the maximum crush of 28,559 recorded in 2013.

The total value of winegrapes increased from \$30 million to \$37.5 million mainly due to increased yields but also due to firming prices – particularly in the red varieties.

The average price of Cabernet Sauvignon increased by \$344 to \$1,617 per tonne while the average for Shiraz increased by \$96 to \$1,997 per tonne (after an increase of nearly \$300 in 2015). The white varieties showed a very slight overall decrease, with Sauvignon Blanc down by \$21 to \$1255 per tonne while Pinot Gris was up by \$11 to \$1444 per tonne.

The price dispersion data shows that 47% of red varieties were purchased at over \$1500 compared with 42% in 2015. For the whites, 62% were purchased between \$600 and \$1500 and 33% at above \$1500 – very similar to last year.

There were 13 hectares of new vines planted in 2015. Half of these new plantings were Chardonnay (6ha). The total area planted in the region decreased by 47 hectares with most of the removals being in white varieties.

ADELAIDE HILLS
Winegrape intake summary – vintage 2016

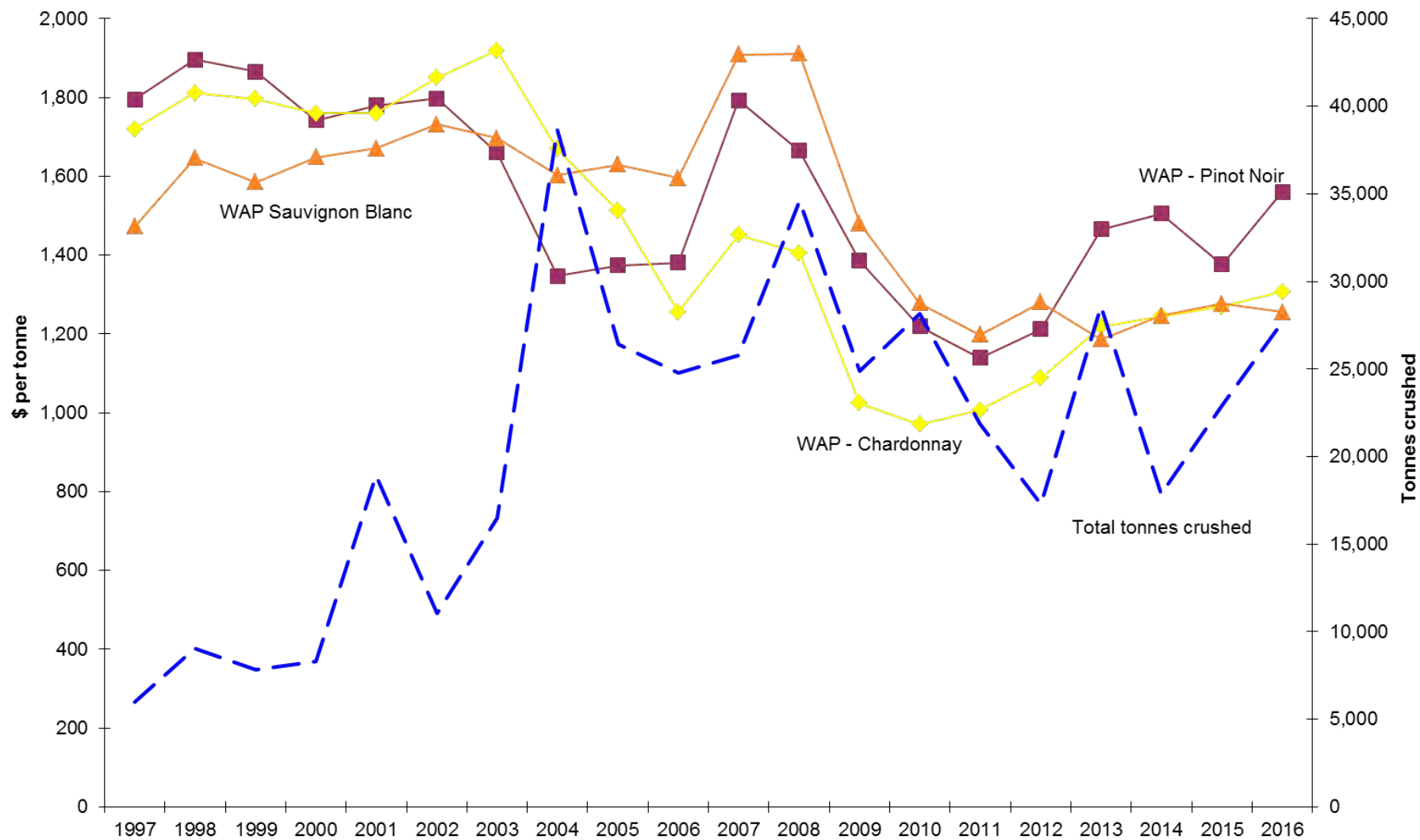
Variety	Tonnes purchased	E ¹	D	C	B	A	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
		(less than \$300)	(\$300- \$600)	(\$600- \$1,500)	(\$1,500- \$2,000)	(above \$2,000)					
Cabernet Sauvignon	344	0%	8%	69%	7%	16%	\$555,641	\$1,617	129	473	\$764,809
Malbec	6	na	na	na	na	na	\$8,580	\$1,500	-	6	\$8,580
Merlot	748	0%	33%	67%	1%	0%	\$506,176	\$677	48	796	\$538,406
Petit Verdot	-	na	na	na	na	na	\$0		1	1	\$1,509
Pinot Noir	4,244	0%	1%	46%	37%	16%	\$6,624,927	\$1,561	850	5,094	\$7,952,383
Sangiovese	22	0%	0%	61%	39%	0%	\$29,438	\$1,311	-	22	\$29,438
Shiraz	767	0%	0%	33%	21%	46%	\$1,532,192	\$1,997	452	1,219	\$2,434,363
Tempranillo	95	0%	0%	27%	61%	12%	\$155,698	\$1,632	33	128	\$209,185
Other red	244	0%	0%	70%	16%	14%	\$351,431	\$1,441	52	296	\$427,076
Red Total	6,470	0%	5%	49%	29%	18%	\$9,764,083	\$1,509	1,565	8,036	\$12,365,748
Chardonnay	6,737	4%	6%	63%	15%	13%	\$8,807,986	\$1,307	1,346	8,084	\$10,568,135
Pinot Gris and Pinot Grigio	1,497	0%	1%	69%	18%	11%	\$2,161,289	\$1,444	1,210	2,707	\$3,908,733
Riesling	405	0%	0%	86%	12%	1%	\$353,954	\$874	76	481	\$420,376
Sauvignon Blanc	5,346	0%	1%	72%	25%	1%	\$6,709,614	\$1,255	2,195	7,541	\$9,464,850
Semillon	163	0%	28%	72%	0%	0%	\$114,905	\$706	161	324	\$228,602
Traminer	172	0%	0%	95%	5%	0%	\$127,652	\$741	18	190	\$140,782
Viognier	38	0%	26%	69%	5%	0%	\$34,773	\$905	20	58	\$52,570
Other white	148	0%	0%	46%	39%	15%	\$212,752	\$1,442	102	250	\$360,212
White Total	14,506	2%	4%	68%	19%	8%	\$18,522,923	\$1,277	5,129	19,634	\$25,144,260
Grand Total	20,976	1%	4%	62%	22%	11%	\$28,287,006	\$1,349	6,694	27,670	\$37,510,008

¹ Percentages reflect pricing grade's share of purchases for each variety

² It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

ADELAIDE HILLS

Historical Weighted Average Price vs tonnes crushed

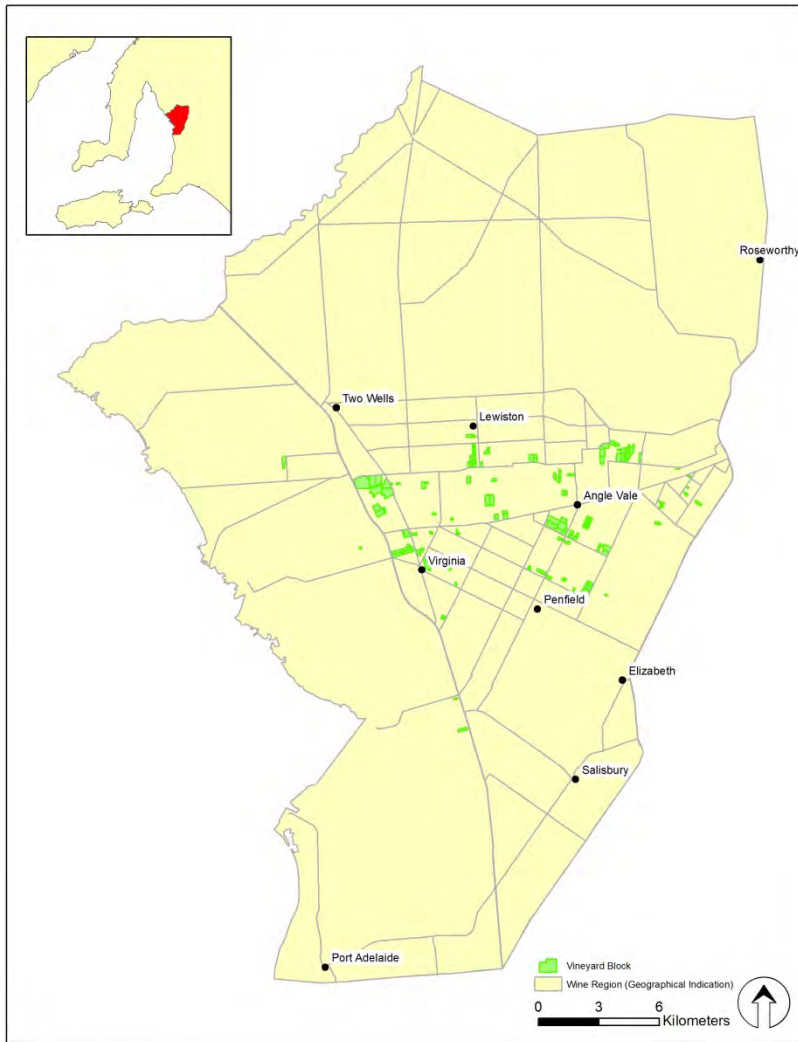


ADELAIDE HILLS

Current plantings by variety and year planted

Source: Vinehealth Australia

Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
Red winegrapes						
Cabernet Franc	6	1	1	0	7	1%
Cabernet Sauvignon	199	0	5	0	204	0%
Grenache	2	0	0	0	2	0%
Merlot	156	0	0	0	156	0%
Meunier (Pinot Meunier)	25	0	0	0	25	0%
Nebbiolo	10	0	0	0	10	0%
Other Red	28	3	1	1	34	3%
Pinot Noir	657	5	7	3	672	0%
Sangiovese	12	0	0	0	12	0%
Shiraz	331	8	3	1	344	0%
Tempranillo	26	3	0	0	29	0%
Total red varieties	1,452	20	17	5	1,495	0%
White winegrapes						
Chardonnay	803	11	2	6	822	1%
Gruner Veltliner	16	1	1	1	18	7%
Other White	29	0	0	1	30	2%
Pinot Gris	250	1	0	0	251	0%
Riesling	65	1	0	0	66	0%
Sauvignon Blanc	991	2	2	0	996	0%
Semillon	59	0	0	0	59	0%
Traminer (Gewurztraminer)	22	0	0	0	22	0%
Verdelho	3	0	0	0	3	0%
Viognier	27	0	0	0	27	0%
Total white varieties	2,266	16	5	8	2,295	0%
Rootstock Block	2	0	0	0	2	0%
Unknown variety	27	0	0	0	27	0%
Total all varieties	3,747	37	22	13	3,818	0%



DATUM: GDA94
 PROJECTION: MGA Zone 54
 DATE: 26th July 2013
 SOFTWARE: ESRI ArcGIS v10.4
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia
 Localities - SA Gazetteer
 Road - DPTI

Adelaide Plains Wine Region


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SA Winegrape Crush Survey Regional Summary Report – 2016

Adelaide Plains Wine Region

ADELAIDE PLAINS

Vintage report

Winter/spring in 2015 was generally drier than average, leaving the sub surface water levels lower than desired. Many vineyards started irrigating earlier than in previous years. This was compounded by a mild spring.

Pre harvest weather was on the whole very good. The warm early season led to early ripening of the vineyards, with vintage starting approx. 10 days earlier than in 2015. A couple of hot spells (that didn't last too long), came early enough to have little effect on the ripening patterns of the fruit. The cool nights this year were very beneficial, keeping the natural acidity of the grapes high, and reducing levels of water stress that can be common in this region.

Yields of most varieties were (generally) slightly above what we would expect from each block. Cabernet Sauvignon was lower than usual, with many blocks having spindly bunches, and very small berries (The wines turned quite deeply coloured and dense).

All varieties (reds and whites) this season were generally of above average quality. Ripe flavours developed at lower sugar levels, showing lovely fresh varietal fruit characters, retention of acidity, and deep vibrant colours in the reds. Standouts this year were Shiraz, and surprisingly aromatic whites.

2016 was the best all round vintage I have seen in the 10 years of working in this area. 2013 was as good in the red varieties, but the whites did not match up with 2016.

Tony Carapetis, Winemaker, Virgara Wines

Vintage overview

Overview of vintage statistics

A total of 4,396 tonnes of Adelaide Plains winegrapes were crushed in 2016, up from 3,091 tonnes in 2015 and similar to the 4,360 tonnes crushed in 2014.

The five year average crush from this region is 4,035 tonnes, implying that the 2016 yield overall was slightly above average. The minimum crush over the period was the 2015 vintage with the maximum crush of 4,458 tonnes recorded in 2012.

The total value of winegrapes increased to just over \$4 million. For most varieties the average price paid increased despite the increased tonnage. Mataro was the only reported variety to record a decrease, down by more than \$300 to \$1187 per tonne while Shiraz was up by \$159 to \$973 per tonne. All the major whites increased in average price – particularly Chardonnay, which was up by \$90 per tonne (a 15% increase) and Sauvignon Blanc, up \$74 (10%) to \$776 per tonne.

The price dispersion data shows that 96% of red varieties were purchased at between \$600 and \$1500, while only 4% were purchased at over \$1500. However, this year, none of the red varieties were purchased at below \$600 per tonne compared with 2015 when 26% of fruit was purchased below \$600 per tonne. The distribution of prices also showed an improvement for the whites, with only 17% being purchased at below \$600 per tonne compared with 37% in 2015.

There were no new plantings of vines in 2015, but also no significant decrease in area – after over 100ha were removed in the previous 12 months.

ADELAIDE PLAINS
Winegrape intake summary – vintage 2016

Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Sauvignon	658	0%	0%	94%	6%	0%	\$616,403	\$936	18	677	\$633,443
Grenache	-	na	na	na	na	na	\$0		4	4	\$3,611
Mataro	87	1%	0%	40%	59%	0%	\$103,223	\$1,187	-	87	\$103,223
Merlot	158	0%	0%	100%	0%	0%	\$110,574	\$698	-	158	\$110,574
Shiraz	2,226	0%	0%	99%	1%	0%	\$2,165,986	\$973	50	2,276	\$2,214,359
Other red	95	0%	0%	100%	0%	0%	\$75,980	\$799	-	95	\$75,980
Red Total	3,225	0%	0%	96%	4%	0%	\$3,072,166	\$953	72	3,296	\$3,141,189
Chardonnay	231	0%	49%	51%	0%	0%	\$159,626	\$690	-	231	\$159,626
Colombard	-	na	na	na	na	na	\$0		93	93	\$75,420
Pinot Gris and Pinot Grigio	363	0%	0%	100%	0%	0%	\$349,562	\$962	-	363	\$349,562
Sauvignon Blanc	350	0%	0%	100%	0%	0%	\$271,450	\$776	-	350	\$271,450
Semillon	62	0%	100%	0%	0%	0%	\$32,701	\$530	-	62	\$32,701
White Total	1,006	0%	17%	83%	0%	0%	\$813,339	\$808	93	1,099	\$888,759
Grand Total	4,231	0%	4%	93%	3%	0%	\$3,885,505	\$918	165	4,396	\$4,029,948

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

ADELAIDE PLAINS

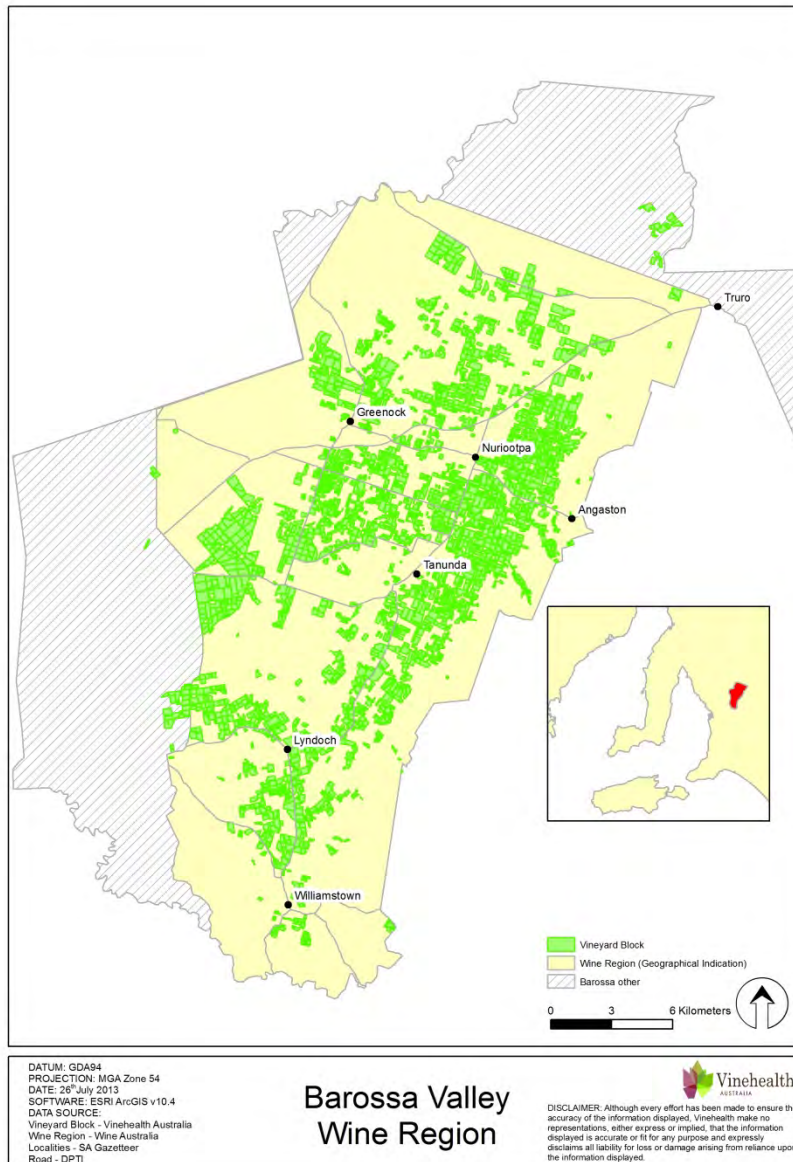
Current plantings by variety and year planted

Source: Vinehealth Australia

Variety	Current area in hectares					% planted in 2015
	Pre-2013	2013	2014	2015	Total area	
Red winegrapes						
Cabernet Sauvignon	53	0	0	0	53	0%
Grenache	31	0	0	0	31	0%
Malbec	6	0	0	0	6	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	39	0	0	0	39	0%
Other Red	11	0	0	0	11	0%
Pinot Noir	16	0	0	0	16	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	197	1	0	0	198	0%
Tempranillo	2	0	0	0	2	0%
Total red varieties	370	1	0	0	371	0%
White winegrapes						
Chardonnay	28	0	0	0	28	0%
Chenin Blanc	5	0	0	0	5	0%
Colombard	9	0	0	0	9	0%
Other White	3	1	0	0	4	0%
Pinot Gris	26	0	0	0	26	0%
Riesling	13	0	0	0	13	0%
Sauvignon Blanc	26	0	0	0	26	0%
Semillon	5	0	0	0	5	0%
Total white varieties	115	1	0	0	116	0%
Unknown variety	28	0	0	0	28	0%
Total all varieties	513	2	0	0	515	0%

SA Winegrape Crush Survey Regional Summary Report – 2016

Barossa Valley Wine Region (including Barossa Zone - other)



BAROSSA VALLEY

Vintage overview

Vintage report

The 2015/16 growing season started in the middle of a dry year in the Barossa Valley. Annual (2015) rainfall was 338mm, 72% of the long term average. The resulting drier soils, combined with a warmer than average spring and early summer (Oct – Dec maximum temps were 2-5C warmer than average), meant the vines got away at a cracking pace, growing well and setting a good number of bunches.

In late November on a horrifically windy day a fire started at Pinery on the Adelaide Plains. It raced through cropping land to the western edge of the Barossa in a few hours, when a very timely wind change took the fire away to the north before there was any damage to vineyards.

January was less extreme, with average temperatures and few heat spikes. With no rain for most of the month the grapes kept ripening quickly, and it looked like vintage was going to arrive in a rush. Up to 30mm of rain fell in the last days of the month, providing welcome refreshment for vines and people alike.

February continued to be even and dry, so when harvest started in early February it continued quickly and evenly. March, while expectedly cooler than February, was above average in temperature and rainfall, so ripening didn't slow down. By the end of March and Easter many wineries had finished picking; those that had not had only a few later ripening blocks or varieties to go.

Despite the challenges of the dry season and in many vineyards limited water, most vineyards ripened evenly and completely, once again proving the tenacity of the grape vine, and the value of old vines.

It was a difficult year for estimating crops. Higher than average bunch numbers in a very dry year meant berries were mostly smaller than average. The result overall was good but not bumper yields, with great flavours and colours (in reds)

and surprisingly good natural acids. Standout varieties this year include Shiraz and Grenache, but disappointments are few.

Louisa Rose – Head of Winemaking, Yalumba

Overview of vintage statistics

Barossa Valley's crush came in at 54,371 tonnes in 2016 – up nearly 10,000 tonnes compared with 2015.

Over the last 5 years, the average Barossa Valley production is 47,827 tonnes, with a low of 43,824 tonnes in 2013. The 2016 crush is the highest in the five year period, although the 2011 crush was significantly higher at 63,367 tonnes.

The total value of grapes from the region is estimated to have been \$102.2 million, up from \$79.4 million in 2015. Most of the major varieties recorded an increase in average price paid. The average price of Shiraz was \$2,212 per tonne – up from \$2,137 the year prior and once again the highest average price ever recorded. The average price of Cabernet Sauvignon also increased – up \$92 to \$1,900 (another record average price). Chardonnay (up \$21 to \$601 per tonne) and Semillon (up \$75 to \$678 per tonne) also both recorded an increase.

The price dispersion data shows that 60% of red grapes were purchased at over \$2000 per tonne (compared with 40% in 2015), while 88% were purchased at \$1500 or more.

There were 124 hectares of new plantings in the Barossa Valley in spring 2015 (including top-working and replacements) compared with 242 hectares planted in 2014 and 211 ha in 2013. Of the new plantings, Shiraz accounted for nearly two-thirds (76 hectares) and Cabernet Sauvignon one third (42 hectares). However, the net area only increased by 4 hectares, indicating that most of the new plantings were replacements of existing vines or were offset by removals.

BAROSSA VALLEY
Winegrape intake summary – vintage 2016
Red varieties

Variety	Tonnes purchased	E ¹	D	C	B	A	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
		(less than \$300)	(\$300- \$600)	(\$600- \$1,500)	(\$1,500- \$2,000)	(above \$2,000)					
Cabernet Franc	94	0%	0%	97%	3%	0%	\$103,552	\$1,106	27	120	\$132,968
Cabernet Sauvignon	4,076	0%	0%	13%	41%	46%	\$7,743,374	\$1,900	3,196	7,273	\$13,814,678
Durif	64	0%	0%	0%	100%	0%	\$100,277	\$1,568	4	68	\$107,127
Grenache	2,045	0%	0%	39%	41%	20%	\$3,314,672	\$1,621	932	2,976	\$4,824,645
Malbec	46	0%	0%	0%	79%	21%	\$74,303	\$1,624	103	149	\$241,456
Mataro	582	0%	0%	11%	51%	38%	\$1,097,274	\$1,886	414	995	\$1,877,114
Merlot	1,232	0%	0%	79%	21%	0%	\$1,333,737	\$1,083	232	1,463	\$1,584,499
Muscat a Petit Grains Rouge/Rose	16	0%	0%	89%	11%	0%	\$15,804	\$984	-	16	\$15,804
Nero D'Avola	17	0%	0%	22%	78%	0%	\$25,059	\$1,454	29	46	\$67,093
Petit Verdot	41	0%	0%	57%	27%	16%	\$55,988	\$1,352	47	88	\$119,252
Pinot Noir	266	0%	0%	97%	3%	0%	\$208,873	\$784	-	266	\$208,873
Sangiovese	273	0%	0%	94%	0%	6%	\$372,343	\$1,365	88	361	\$493,045
Shiraz	18,130	0%	0%	0%	22%	77%	\$40,109,263	\$2,212	14,404	32,533	\$71,975,434
Tempranillo	430	0%	0%	19%	81%	1%	\$676,609	\$1,573	119	549	\$863,541
Other red	229	18%	0%	46%	17%	19%	\$304,203	\$1,328	173	402	\$533,570
Red Total	27,541	0%	0%	12%	28%	60%	\$55,535,331	\$2,016	19,766	47,307	\$96,859,100

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

BAROSSA VALLEY
Winegrape intake summary – vintage 2016
White varieties

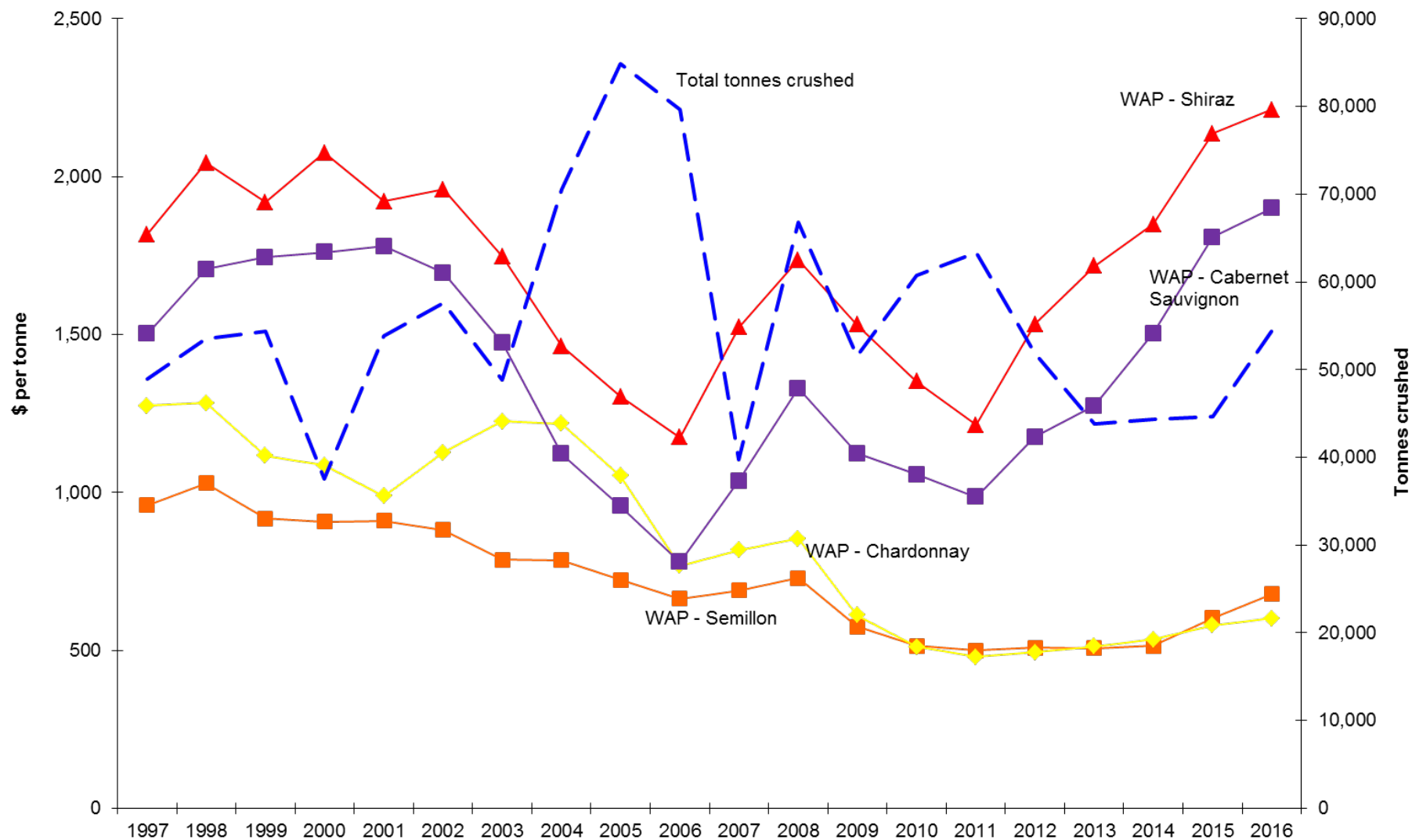
Variety	Tonnes purchased	E ¹	D	C	B	A	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
		(less than \$300)	(\$300- \$600)	(\$600- \$1,500)	(\$1,500- \$2,000)	(above \$2,000)					
Chardonnay	1,525	0%	37%	63%	0%	0%	\$915,839	\$601	891	2,416	\$1,451,034
Chenin blanc	35	0%	0%	55%	45%	0%	\$40,166	\$1,136	-	35	\$40,166
Marsanne	17	0%	0%	61%	6%	33%	\$26,743	\$1,603	32	49	\$77,775
Muscadelle	23	0%	0%	100%	0%	0%	\$18,192	\$800	4	26	\$21,008
Muscat a Petit Grains blanc	277	0%	0%	94%	6%	0%	\$221,235	\$800	59	336	\$268,451
Muscat Gordo blanco	-	na	na	na	na	na	\$0		16	16	\$11,868
Palomino and Pedro Ximenes	14	0%	6%	18%	76%	0%	\$18,178	\$1,313	123	137	\$179,506
Pinot Gris and Pinot Grigio	58	0%	0%	100%	0%	0%	\$51,284	\$879	72	131	\$114,769
Riesling	720	0%	0%	100%	0%	0%	\$576,255	\$800	119	840	\$671,632
Sauvignon blanc	473	0%	3%	97%	0%	0%	\$391,992	\$828	29	502	\$416,055
Semillon	1,572	0%	33%	66%	0%	0%	\$1,065,496	\$678	261	1,833	\$1,242,455
Traminer	111	0%	0%	100%	0%	0%	\$80,483	\$723	-	111	\$80,483
Viognier	363	0%	3%	73%	19%	5%	\$472,594	\$1,302	109	472	\$614,026
Other white	121	0%	0%	96%	4%	0%	\$114,943	\$948	40	162	\$153,213
White Total	5,310	0%	21%	76%	2%	0%	\$3,993,400	\$752	1,755	7,064	\$5,342,442
Grand Total	32,851	0%	3%	22%	24%	50%	\$59,528,730	\$1,812	21,521	54,371	\$102,201,542

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

BAROSSA VALLEY

Historical Weighted Average Price vs tonnes crushed



BAROSSA VALLEY

Current plantings by variety and year planted*

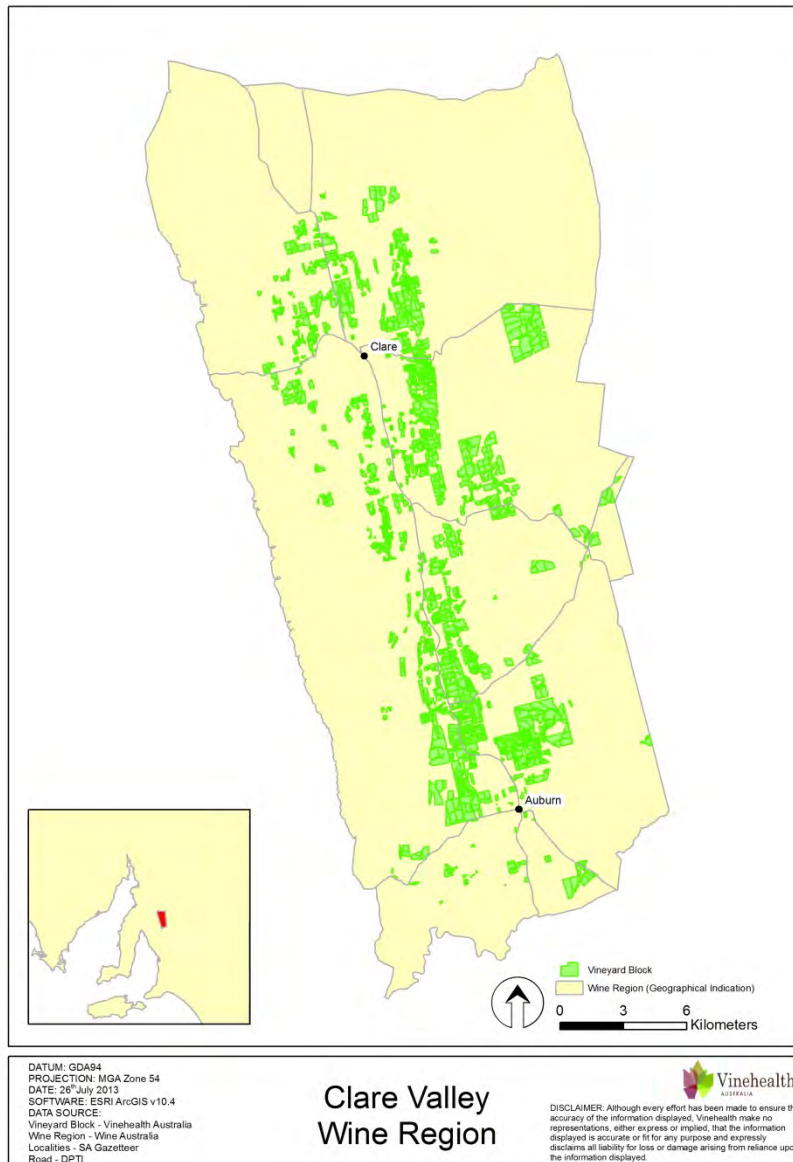
Variety	Current area in hectares					% planted in
	Pre-2013	2013	2014	2015	Total area	2015
Red winegrapes						
Cabernet Franc	30	0	0	0	30	0%
Cabernet Sauvignon	1,460	24	16	42	1,542	3%
Durif (Petite Sirah)	18	1	0	1	21	4%
Grenache	663	4	2	0	669	0%
Malbec	24	2	0	0	26	0%
Mataro (Mourvedre)	242	8	4	1	256	0%
Merlot	349	0	0	0	349	0%
Other Red	98	1	3	0	103	0%
Petit Verdot	22	0	0	0	22	0%
Pinot Noir	38	0	0	0	38	0%
Sangiovese	27	0	0	0	27	0%
Shiraz	6,419	161	214	76	6,869	1%
Tempranillo	97	2	0	2	102	2%
Zinfandel	13	0	0	0	13	0%
Total red varieties	9,501	203	239	122	10,065	1%
White winegrapes						
Chardonnay	363	0	1	0	364	0%
Chenin Blanc	15	0	0	0	15	0%
Marsanne	10	1	0	0	11	0%
Muscadelle (Tokay)	13	0	0	0	13	0%
Muscat A Petit Grains Blanc (White Frontignac)	52	3	1	0	56	0%
Other White	48	2	0	0	50	0%
Pedro Ximenez	5	0	0	0	5	0%
Pinot Gris	14	2	0	1	16	3%
Riesling	170	1	0	1	172	1%
Sauvignon Blanc	65	0	0	0	65	0%
Savagnin	5	0	0	0	5	0%
Semillon	379	0	0	0	379	0%
Vermentino	9	0	0	0	9	0%
Viognier	63	0	0	0	63	0%
Total white varieties	1,211	8	3	2	1,223	0%
Unknown variety	84	0	0	0	84	0%
Total all varieties	10,795	211	242	124	11,372	1%

* Includes plantings in Barossa zone - other (235 hectares)

Source: Vinehealth Australia

SA Winegrape Crush Survey Regional Summary Report – 2016

Clare Valley Wine Region



CLARE VALLEY

Vintage overview

Vintage report

Following a good growing season in 2014/15 and a short early vintage along with a relatively wet autumn, vines were 'stress free' going into winter 2015 allowing them to store extra nutrients creating the potential for a better 2016 crop.

Winter 2015 was fairly cold early and rainfall was slightly below average until August where good late rains were accompanied by much milder conditions. Early spring was very mild and dry giving rise to early bud burst and very fast vine growth. By mid-October vines were well advanced and tracking 2-3 weeks ahead of a normal season with most flowering complete by the start of November. Good rains fell just after flowering and with the absence of any spring frost, everything was well advanced and it looked as though we were going to be in for another early compact vintage.

As there was little rain between the first week of November and the last week of January, water consumption was well up and the new cheaper night-time water product proved useful to most growers. The minimal rainfall meant disease pressure was also down, but dry grown and vineyards on the thinner soils were really starting to struggle.

Much welcomed rain (40mm) fell in the last week of January and then another 11mm on the 3rd of February. The timing of these rain events was the making of 2016 vintage. There was just enough to delay ripening and allow the vines to 'de-stress', and not enough to cause any real disease pressure. Very mild conditions flowed on through the rest of February (1.2degrees cooler than average). This along with a couple more well-timed small rain events meant that ripening slowed right down and allowed time to harvest vineyard parcels at their best.

Things did get a little tight in the last week of February through until the middle of March when most wineries were starting to struggle for capacity due to the extra tonnes coming, but once again the weather gods smiled and a forecast heatwave didn't occur, once again taking the pressure off a little.

The quality of Shiraz and Riesling in general is outstanding, while the crush is up 25% on last year, with solid fruit quantities across all varieties.

Matthew Lawson – Chair, Clare Valley Winemakers Inc.

Troy Van Dulken – Chair, Clare Region Winegrape Growers Assoc.

Overview of vintage statistics

A total of 20,795 tonnes of Clare Valley winegrapes were crushed in 2016, up by 25% from 16,039 tonnes in 2015, and slightly up from 19,796 tonnes in 2014. Over the past five years, the average crush for Clare has been 18,895 tonnes. The 2016 crush was the highest in the five year period, and the 2015 crush was the lowest.

The total value of winegrapes increased by 36% from 17.6 million to \$24 million mainly due to increased yields.

The average price of the major red varieties increased compared with 2015 despite the increased tonnage. The average for Shiraz increased by \$158 to \$1,424 and Cabernet Sauvignon increased by \$26 to \$1,181 per tonne while the average for Merlot increased by \$14 to \$827 per tonne. The results for white varieties were mixed; Riesling decreased by \$9 to \$1,015 per tonne while Chardonnay increased by \$84 to \$824 per tonne.

The price dispersion data shows that 20% of red varieties were sold at above \$1500 per tonne compared with 13% in 2015. 95% of white varieties were purchased at between \$600 and \$1500 – a relatively narrow dispersion range.

There were 23 hectares of new vines planted in 2015. Over one-third of these new plantings were Shiraz (9ha), while smaller plantings of Riesling (5ha) and Cabernet Sauvignon (3ha) were recorded. Overall the total area planted decreased by 59 ha (1%).

CLARE VALLEY
Winegrape intake summary – vintage 2016

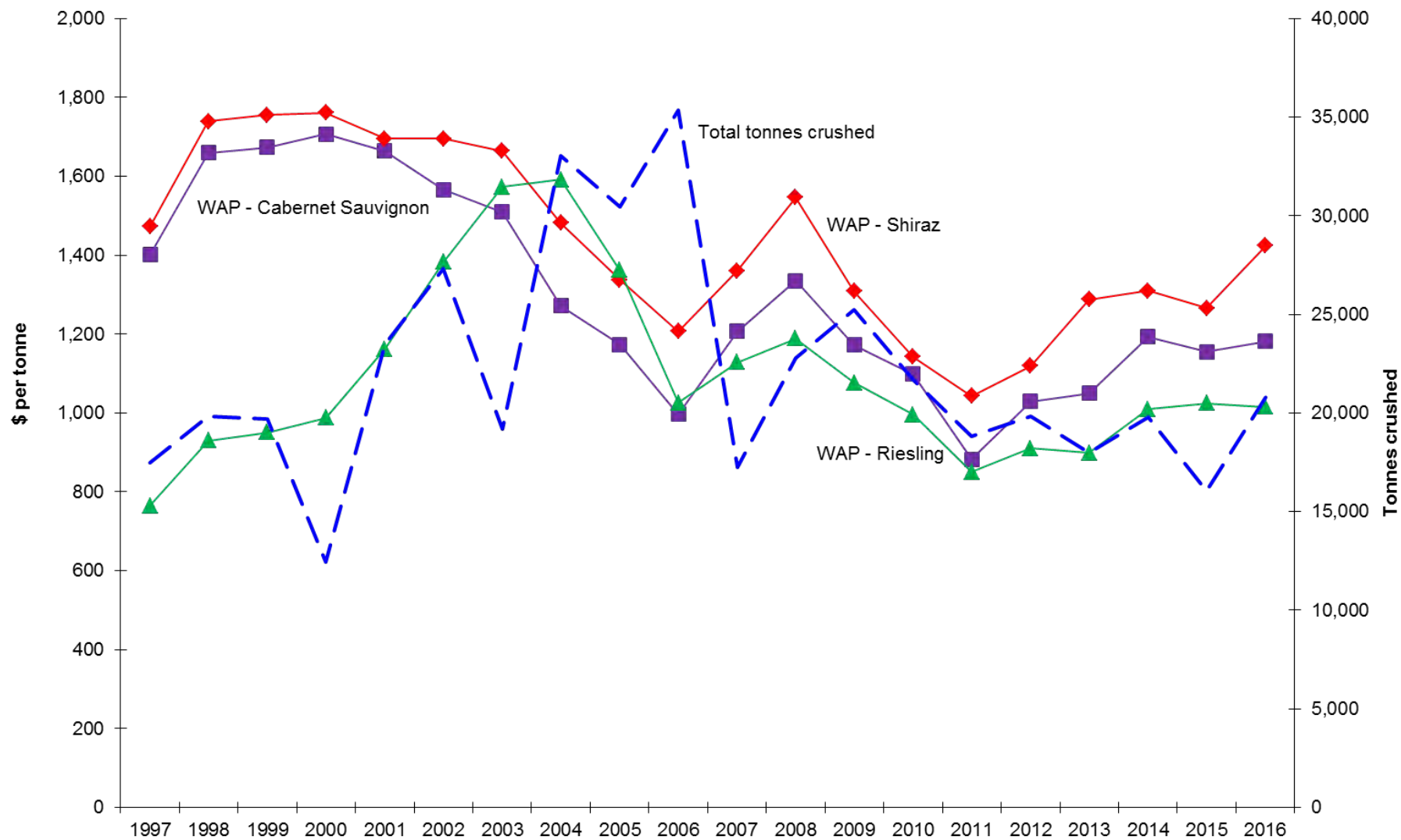
Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Barbera	-	na	na	na	na	na	\$0		8	8	\$10,071
Cabernet Sauvignon	1,563	0%	0%	89%	9%	2%	\$1,844,613	\$1,181	2,672	4,235	\$4,999,616
Grenache	135	0%	0%	41%	56%	3%	\$205,086	\$1,514	112	247	\$374,174
Malbec	152	0%	0%	67%	33%	0%	\$183,443	\$1,207	200	352	\$424,863
Mataro	59	0%	0%	0%	88%	12%	\$92,099	\$1,566	22	81	\$126,343
Merlot	676	0%	0%	99%	1%	0%	\$559,256	\$827	653	1,329	\$1,099,513
Muscat a Petit Grains Rouge/Rose	-	na	na	na	na	na	\$0		2	2	\$2,633
Pinot Noir	-	na	na	na	na	na	\$0		72	72	\$91,612
Ruby Cabernet	-	na	na	na	na	na	\$0		7	7	\$9,279
Shiraz	3,072	0%	0%	74%	18%	8%	\$4,374,226	\$1,424	3,019	6,091	\$8,673,033
Tempranillo	85	0%	0%	100%	0%	0%	\$93,142	\$1,091	65	151	\$164,480
Other red	64	0%	0%	91%	0%	9%	\$69,150	\$1,073	139	203	\$218,249
Red Total	5,806	0%	0%	80%	15%	5%	\$7,421,016	\$1,278	6,971	12,778	\$16,193,866
Chardonnay	642	0%	0%	100%	0%	0%	\$529,121	\$824	605	1,247	\$1,027,736
Muscadelle	-	na	na	na	na	na	\$0		11	11	\$10,592
Palomino and Pedro Ximenes	-	na	na	na	na	na	\$0		6	6	\$6,176
Pinot Gris and Pinot Grigio	187	0%	0%	100%	0%	0%	\$221,172	\$1,186	169	355	\$421,232
Riesling	3,075	0%	0%	93%	5%	2%	\$3,120,208	\$1,015	2,535	5,610	\$5,692,090
Sauvignon blanc	-	na	na	na	na	na	\$0		30	30	\$29,051
Semillon	152	0%	0%	100%	0%	0%	\$119,742	\$786	231	383	\$300,959
Traminer	150	0%	0%	100%	0%	0%	\$106,135	\$707	47	197	\$139,156
Verdelho	-	na	na	na	na	na	\$0		12	12	\$11,491
Other white	47	0%	0%	85%	15%	0%	\$59,523	\$1,270	119	166	\$211,219
White Total	4,253	0%	0%	95%	4%	1%	\$4,155,900	\$977	3,764	8,017	\$7,849,702
Grand Total	10,059	0%	0%	86%	10%	4%	\$11,576,916	\$1,151	10,735	20,795	\$24,043,568

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

CLARE VALLEY

Historical Weighted Average Price vs tonnes crushed

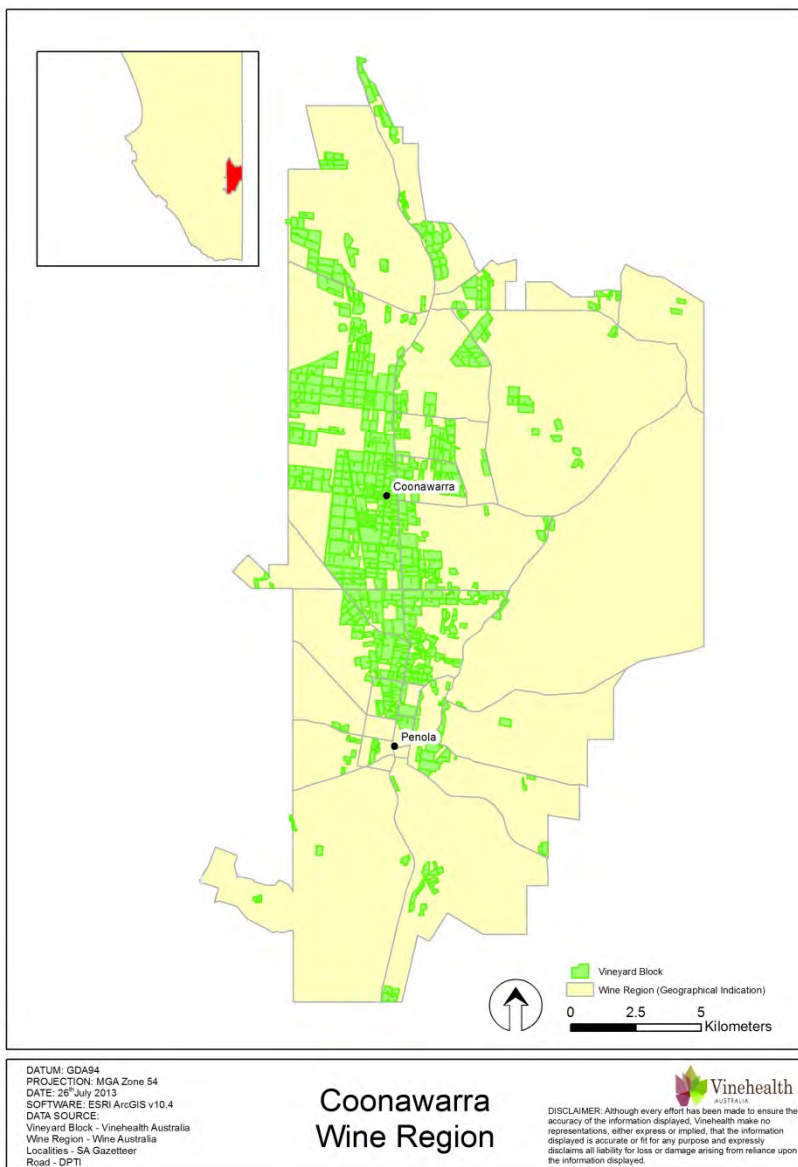


CLARE VALLEY

Current plantings by variety and year planted

Source: Vinehealth Australia

Variety	Current area in hectares				Total area	% planted in
	Pre-2013	2013	2014	2015		2015
Red winegrapes						
Cabernet Franc	15	0	0	0	15	0%
Cabernet Sauvignon	1,142	35	14	3	1,194	0%
Grenache	63	0	0	0	63	0%
Malbec	70	4	1	0	75	0%
Mataro (Mourvedre)	33	1	0	2	35	6%
Merlot	286	0	0	0	286	0%
Nebbiolo	4	0	0	0	4	0%
Other Red	34	1	0	1	36	3%
Sangiovese	28	0	0	0	28	0%
Shiraz	1,829	16	12	9	1,866	0%
Tempranillo	31	0	1	0	32	0%
Total red varieties	3,535	57	28	15	3,635	0%
White winegrapes						
Chardonnay	192	0	0	0	192	0%
Other White	20	4	0	1	26	5%
Pinot Gris	46	0	2	2	50	4%
Riesling	1,088	1	0	5	1,094	0%
Sauvignon Blanc	21	0	0	0	21	0%
Semillon	134	0	0	0	134	0%
Traminer (Gewurztraminer)	27	0	0	0	27	0%
Verdelho	4	0	0	0	4	0%
Viognier	14	0	0	0	14	0%
Total white varieties	1,545	5	2	8	1,560	1%
Unknown variety	20	0	0	0	20	0%
Rootstock Block	1	0	0	0	1	0%
Total all varieties	5,100	62	31	23	5,216	0%



SA Winegrape Crush Survey Regional Summary Report – 2016

Coonawarra Wine Region

COONAWARRA

Vintage Overview

Vintage report

Vintage 2016 was early, with a warmer October advancing the whole season, such that flowering, veraison and harvest dates were all a couple of weeks early. However, despite the early season, the time taken for berry development and ripening was in line with normal, allowing adequate time for fruit to develop tannins and complexity.

November temperatures were warm, which was ideal as there were good flower numbers, and consequently grape numbers per bunch were above average and of even maturity. Yields were an increase on some previous years, but not excessive when managed appropriately.

A turning point in the season came with the cold 'Bonney Upwelling' at the coast in early January, which moderated temperatures from thereafter. February and March temperatures were mild, and the cold nights and warm days delivered an extended ripening period and very promising fruit across all varieties.

The growing season (Sept 2015 – March 2016) was drier than usual, delivering only half the normal rainfall. Vignerons in the region were required to manage available water resources carefully and refine irrigation strategies to conserve and optimise use of the groundwater. Careful irrigation is integral to maintaining leaf function and delivering varietal flavours for the region's winemakers.

Speaking of wine flavours, the region's whites are already showing fresh fruity flavours, while the reds are revealing outstanding colour and tannins. The cooler finish allowed a longer hang time which is contributing to rich medium bodied Cabernet and Shiraz wines with good fruit definition.

Allen Jenkins – President, Coonawarra Grape and Wine Incorporated.

Overview of vintage statistics

A total of 35,497 tonnes of Coonawarra winegrapes were crushed in 2016, up from 27,137 tonnes in 2015. Over the past five years, the average crush of Coonawarra fruit is 28,867 tonnes. The largest crush was the 2016 crush while the smallest in the period was 23,480 tonnes in 2014.

The total value of winegrapes increased by nearly \$12 million from \$35.6 million to \$47.4 million due to higher yields and higher average prices.

The average price of the major varieties increased in the 2016 vintage despite the higher yields. Cabernet Sauvignon increased by \$28 to \$1548 per tonne, Shiraz increased by \$26 to \$1,307 per tonne and Merlot increased by \$57 to \$881 per tonne but Chardonnay declined by \$82 to \$554 per tonne. NB These increases came after significant decreases in average price in 2015.

The price dispersion data shows that 55% of Cabernet Sauvignon tonnes were purchased at between \$600 and \$1500, while 46% were purchased at over \$1500. For Shiraz, 86% was purchased between \$600 and \$1500 and 13% at above \$1500. On the other hand, in the white varieties more than 50% of fruit was purchased at below \$600 per tonne.

There were 77 hectares of new vines planted in Coonawarra in the 2015-16 season, after 182 ha the previous year. This year there was more new Shiraz planted (39ha) than Cabernet Sauvignon (31 hectares). The total area in the region increased slightly (52 ha) – against a trend of decline in net area in most of the SA regions.

COONAWARRA

Winegrape intake summary – vintage 2016

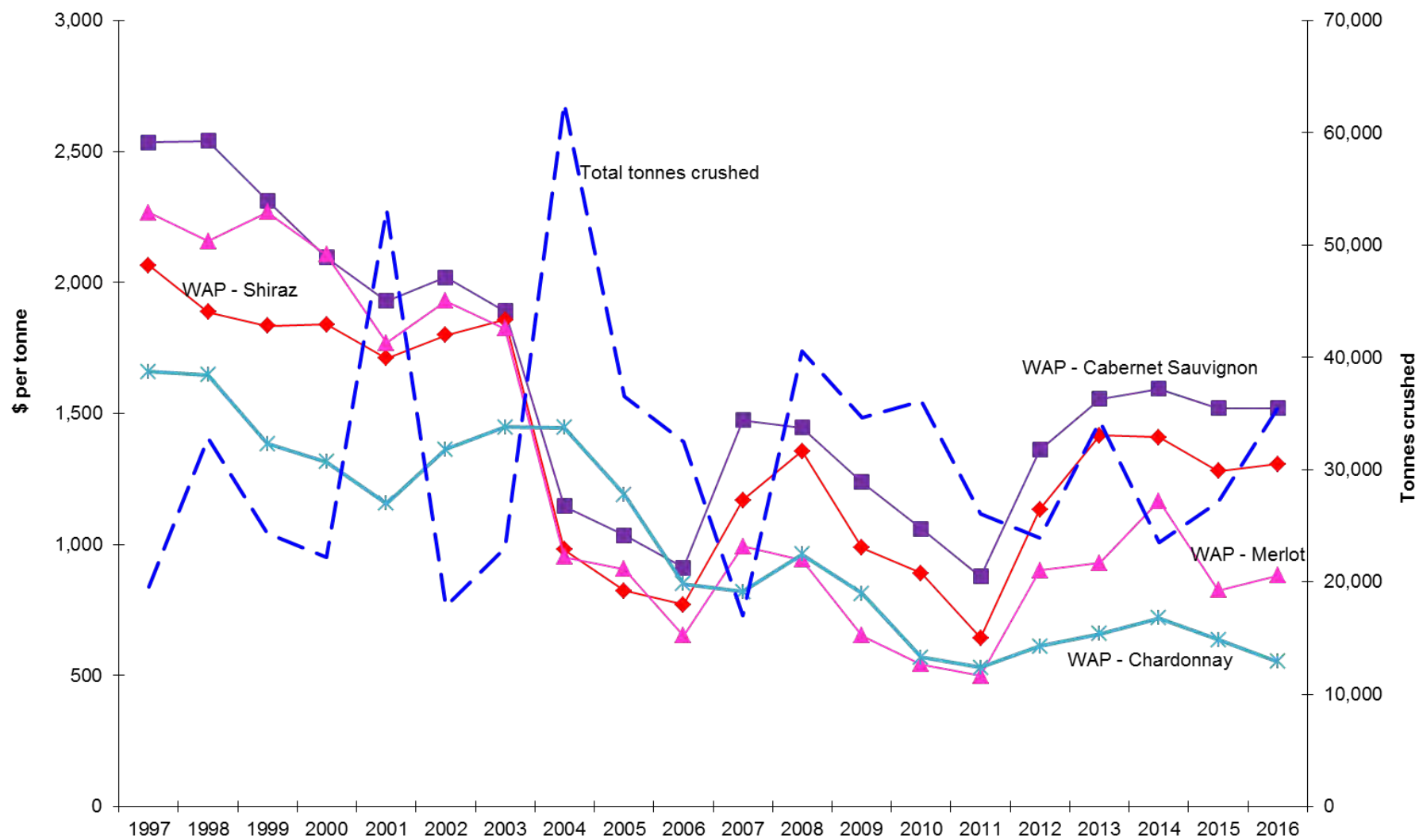
Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Sauvignon	8,994	0%	0%	55%	25%	21%	\$13,921,139	\$1,548	11,250	20,244	\$31,335,411
Malbec	-	na	na	na	na	na	\$0		96	96	\$143,059
Merlot	313	0%	35%	65%	0%	0%	\$275,762	\$881	1,692	2,006	\$1,766,325
Petit Verdot	-	na	na	na	na	na	\$0		232	232	\$344,868
Ruby Cabernet	-	na	na	na	na	na	\$0		4	4	\$5,716
Shiraz	2,029	0%	0%	86%	9%	4%	\$2,652,490	\$1,307	6,024	8,052	\$10,527,865
Tempranillo	-	na	na	na	na	na	\$0		2	2	\$3,356
Other red	58	0%	0%	100%	0%	0%	\$67,020	\$1,160	352	409	\$474,978
Red Total	11,393	0%	1%	61%	21%	17%	\$16,916,411	\$1,485	19,653	31,046	\$44,601,578
Chardonnay	395	0%	73%	27%	0%	0%	\$218,794	\$554	2,417	2,812	\$1,557,838
Palomino and Pedro Ximenes	-	na	na	na	na	na	\$0		8	8	\$4,486
Pinot Gris and Pinot Grigio	-	na	na	na	na	na	\$0		11	11	\$6,622
Sauvignon blanc	124	0%	0%	100%	0%	0%	\$83,562	\$675	692	816	\$550,761
Semillon	-	na	na	na	na	na	\$0		145	145	\$86,159
Other white	21	na	na	na	na	na	\$18,071	\$850	639	660	\$560,902
White Total	540	0%	54%	46%	0%	0%	\$320,427	\$593	3,912	4,452	\$2,766,769
Grand Total	11,933	0%	3%	60%	20%	16%	\$17,236,838	\$1,444	23,564	35,497	\$47,368,347

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

COONAWARRA

Historical Weighted Average Price vs tonnes crushed

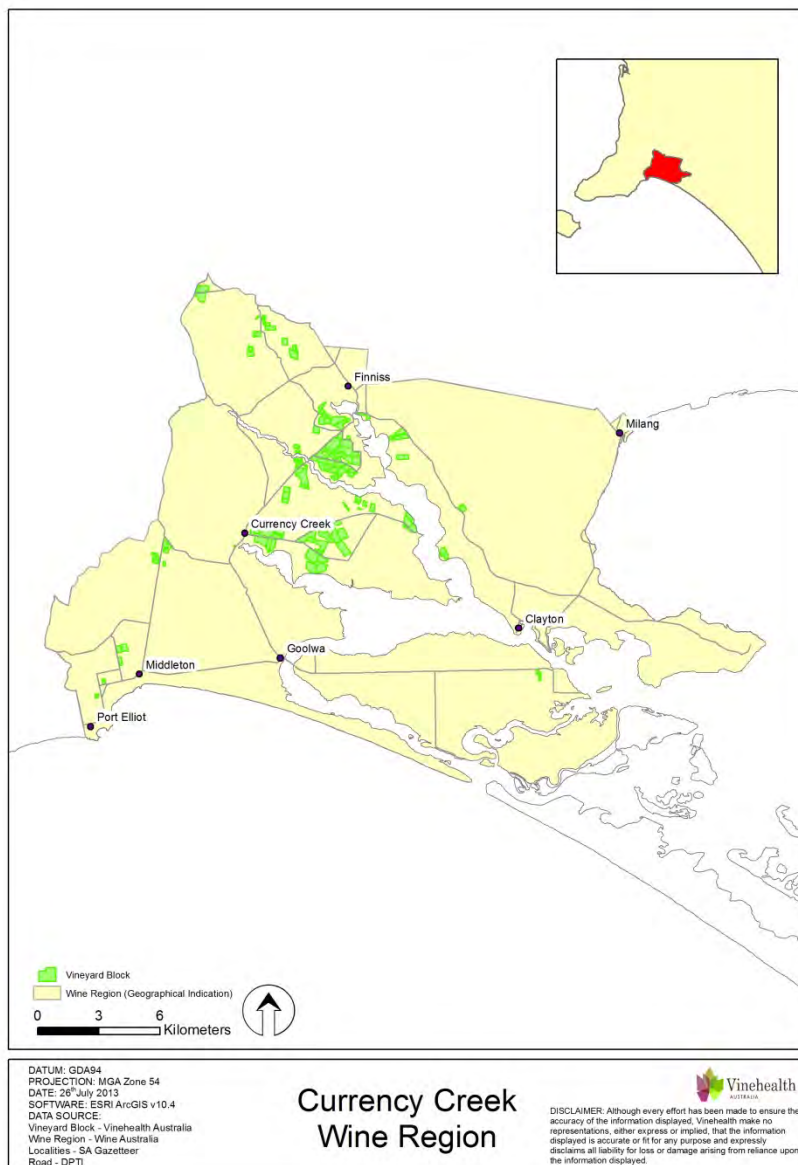


COONAWARRA

Current plantings by variety and year planted

Source: Vinehealth Australia

Variety	Current area in hectares					% planted in 2015
	Pre-2013	2013	2014	2015	Total area	
Red winegrapes						
Cabernet Franc	28	0	0	0	28	0%
Cabernet Sauvignon	3,368	101	144	31	3,643	1%
Malbec	17	1	0	0	18	0%
Merlot	359	3	0	8	369	2%
Other Red	7	0	0	0	7	0%
Petit Verdot	18	0	0	0	18	0%
Pinot Noir	42	0	0	0	42	0%
Shiraz	1,132	13	39	39	1,222	3%
Total red varieties	4,970	118	182	77	5,347	1%
White winegrapes						
Chardonnay	273	0	0	0	273	0%
Other White	7	0	0	0	7	0%
Riesling	72	0	0	0	72	0%
Sauvignon Blanc	99	0	0	0	99	0%
Semillon	12	0	0	0	12	0%
Traminer (Gewurztraminer)	2	0	0	0	2	0%
Viognier	2	0	0	0	2	0%
Total white varieties	467	0	0	0	467	0%
Unknown variety	9	0	0	0	9	0%
Total all varieties	5,446	118	182	77	5,823	1%



SA Winegrape Crush Survey

Regional Summary Report – 2016

Currency Creek Wine Region

CURRENCY CREEK

Vintage report

Cool, dry spring and early summer conditions through to the end of January allowed the whites to develop great flavours and high acidity. Chardonnay and Pinot Gris were picked earlier than past vintages, showing nice fruit forward characters.

The cool, dry conditions became humid and sub-tropical in the last week of January, as an uncharacteristic tropical low sat over the lower Fleurieu Peninsula.

From January 22nd to February 3rd we had 90mm of rain, with the temperature being no higher than 33 degrees and not falling at night below 19.5 degrees, with very little wind and constant cloud cover. These combined conditions proved challenging .

March and April returned to normal average climatic conditions, with the blocks of Shiraz, Grenache, Cabernet Sauvignon and Petit Verdot coming through with little splitting. Harvesting of the reds was completed in the first week of April. Wine produced from the vintage are shaping up as soft with good length and depth.

2016 Currency Creek vintage will be remembered as a challenging vintage, but one which delivered some exceptional parcels of wine.

Nathan Shaw

Shaw Family Vintners

Vintage overview

Overview of vintage statistics

The reported harvest from Currency Creek in 2016 was 10,169 tonnes, much higher than the 2015 harvest of 7,595 tonnes and similar to the 2013 harvest of 10,032 tonnes.

Over the past five years, the average crush was 8,162 tonnes. The 2016 crush was the highest in the five year period, while the minimum crush over the period was 5,748 tonnes in 2012.

The value of fruit from the region was \$8.5 million, compared with \$6.1 million in 2015, as a result of the increased tonnage and a slight rise in average prices. Average prices for the two main varieties, Shiraz and Cabernet Sauvignon, both increased - by \$18 and \$74 per tonne respectively. Sauvignon Blanc increased from \$539 to \$612 per tonne; however Merlot decreased by \$241 to \$702 per tonne.

The price dispersion data shows that 92% of red tonnages were purchased at between \$600 and \$1500, while 89% of the white tonnes were purchased within the same price range – a significant upward shift compared with 2015 where only 19% of whites were purchased at above \$600 per tonne.

There were no new plantings recorded for the region in the 2015-16 season, and there was no change in the net vineyard area.

CURRENCY CREEK
Winegrape intake summary – vintage 2016

Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Sauvignon	1,047	0%	0%	100%	0%	0%	\$948,221	\$906	2,268	3,315	\$3,002,772
Grenache	-	na	na	na	na	na	\$0		135	135	\$119,181
Malbec	-	na	na	na	na	na	\$0		11	11	\$9,794
Merlot	150	0%	72%	28%	0%	0%	\$105,115	\$702	69	219	\$153,295
Petit Verdot	-	na	na	na	na	na	\$0		25	25	\$21,714
Sangiovese	100	0%	0%	100%	0%	0%	\$107,645	\$1,076	-	100	\$107,645
Shiraz	1,590	0%	7%	93%	0%	0%	\$1,381,898	\$869	1,557	3,147	\$2,734,933
Tempranillo	46	0%	0%	66%	34%	0%	\$57,857	\$1,253	-	46	\$57,857
Other red	25	na	na	na	na	na	\$18,893	\$750	132	157	\$117,713
Red Total	2,958	0%	7%	92%	1%	0%	\$2,619,628	\$886	4,196	7,154	\$6,324,904
Chardonnay	-	na	na	na	na	na	\$0		1,275	1,275	\$919,284
Sauvignon Blanc	500	0%	14%	86%	0%	0%	\$305,947	\$612	729	1,229	\$751,980
Semillon	-	na	na	na	na	na	\$0		60	60	\$43,310
Traminer	-	na	na	na	na	na	\$0		77	77	\$55,347
Viognier	-	na	na	na	na	na	\$0		18	18	\$12,852
Other white	130	0%	0%	100%	0%	0%	\$148,196	\$1,142	227	357	\$407,639
White Total	630	0%	11%	89%	0%	0%	\$454,143	\$721	2,385	3,015	\$2,190,413
Grand Total	3,588	0%	8%	92%	0%	0%	\$3,073,771	\$857	6,581	10,169	\$8,515,317

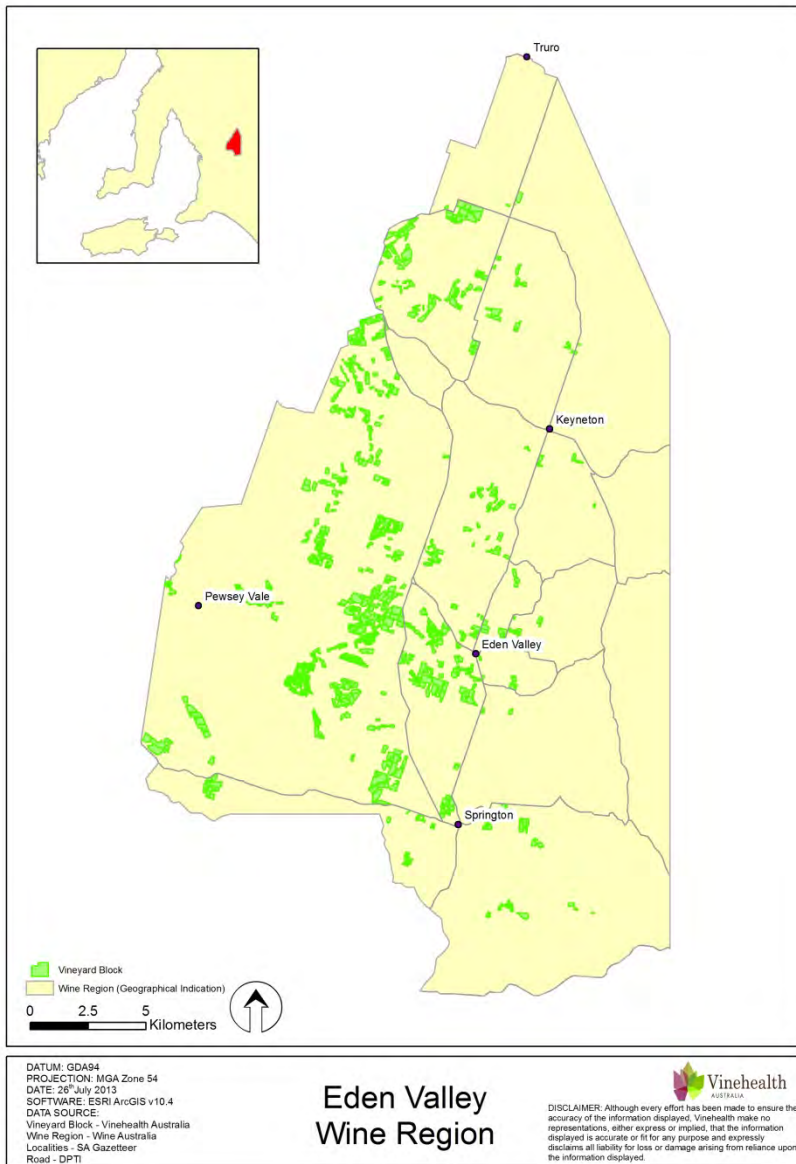
1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

CURRENCY CREEK
Current plantings by variety and year planted

Source: Vinehealth Australia

Variety	Current area in hectares					% planted in
	Pre-2013	2013	2014	2015	Total area	2015
Red winegrapes						
Cabernet Sauvignon	291	0	2	0	294	0%
Grenache	11	0	0	0	11	0%
Lagrein	1	0	0	0	1	0%
Merlot	61	0	0	0	61	0%
Nebbiolo	1	0	0	0	1	0%
Other Red	2	0	0	0	2	0%
Petit Verdot	4	0	0	0	4	0%
Pinot Noir	19	0	0	0	19	0%
Sangiovese	4	0	0	0	4	0%
Shiraz	326	0	3	0	329	0%
Tempranillo	5	0	0	0	5	0%
Total red varieties	724	0	5	0	729	0%
White winegrapes						
Chardonnay	111	0	0	0	111	0%
Other White	18	0	0	0	18	0%
Pinot Gris	17	0	12	0	29	0%
Sauvignon Blanc	55	0	0	0	55	0%
Semillon	8	0	0	0	8	0%
Vermentino	2	0	0	0	2	0%
Viognier	6	0	0	0	6	0%
Total white varieties	218	0	12	0	230	0%
Unknown variety	2	0	0	0	2	0%
Total all varieties	944	0	17	0	961	0%



SA Winegrape Crush Survey Regional Summary Report – 2016

Eden Valley Wine Region

EDEN VALLEY

Vintage overview

Vintage report

As in the neighbouring Barossa Valley, the 2015/16 growing season started in the middle of a dry year in the Eden Valley. Annual (2015) rainfall was 530mm, 75% of the long term average. The resulting drier soils combined with a warmer than average spring and early summer (Oct – Dec maximum temps were 1.5-5.5C warmer than average) so the vines grew well and set a good number of bunches.

January was less extreme with average temperatures and few heat spikes. With no rain for most of the month the vines kept ripening their grapes quickly. Up to 25mm of rain fell in the last days of the month, providing welcome refreshment.

February was very slightly below average in temperature and continued to be even and dry, so when harvest started in February it continued evenly. March, while expectedly cooler than February, was above average in temperature and rainfall. By the end of March and Easter many vineyards were picked, although there were a few cooler sites and later varieties that extended into April.

The challenge of the dry season in many vineyards was limited water, as many vineyards in the Eden Valley rely on surface water catchment in dams which hadn't had any run off the winter before. However, despite this, most vineyards ripened evenly and completely, once again proving the tenacity of the grape vine, and the value of old vines.

It was a difficult year for estimating crops. Higher than average bunch numbers in a very dry year meant berries were mostly smaller than average. The diurnal variation, so important to the Eden Valley wine style, was nearly a degree higher on average. The results overall were good but not bumper yields, with great flavours and colours (in reds) and excellent natural acids. Standout varieties this year include Riesling, Cabernet and Shiraz, but disappointments are few.

Louisa Rose – Head of Winemaking, Yalumba

Overview of vintage statistics

The reported harvest from Eden Valley in 2016 was 9,991 tonnes, almost identical to the 2015 harvest (9,658 tonnes).

The five year average crush for Eden Valley is 9,174 tonnes implying that 2016 yields were basically on par with average. Apart from the minimum crush over the period of 6,460 tonnes in 2014, all the past five reported crush figures for Eden Valley have been around 9, 800 tonnes.

The estimated value of fruit from the region was \$16.9 million, compared with \$15.9 million last year, reflecting a significant jump in the average purchase value across all varieties. The average purchase price for all the major varieties increased again, with Shiraz up by \$35 to \$2,346 per tonne, Chardonnay up by \$160 to \$1,103 per tonne, Riesling by \$201 to \$1,617 per tonne and Cabernet Sauvignon up by \$88 to \$2,358 per tonne, consolidating significant increases last year. Eden Valley had the highest average price paid for Shiraz, Cabernet Sauvignon, Merlot and Riesling in 2016 and the second highest (after the Adelaide Hills) for Chardonnay.

The price dispersion data shows a similar pattern to last year, with 41% of red tonnages purchased at between \$1500 and \$2000, while 48% were purchased at over \$2000, and in the whites, 25% purchased between \$1500 and \$2000 and 5% at above \$2000.

There were 16 hectares of new plantings in Eden Valley in the 2015-16 season, almost all whites, and the total area increased by 16ha. While the amount of new planting is small, it goes against a trend of zero plantings and net reductions in planted area in most regions last season.

EDEN VALLEY
Winegrape intake summary – vintage 2016

Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Barbera	-	na	na	na	na	na	\$0		1	1	\$2,529
Cabernet Franc	11	0%	0%	0%	3%	97%	\$22,580	\$1,989	4	16	\$30,975
Cabernet Sauvignon	452	0%	0%	5%	47%	49%	\$1,064,748	\$2,358	369	821	\$1,935,197
Grenache	9	0%	0%	0%	32%	68%	\$20,224	\$2,293	8	17	\$38,503
Mataro	-	na	na	na	na	na	\$0		29	29	\$63,474
Merlot	176	0%	0%	40%	60%	0%	\$256,284	\$1,455	120	297	\$431,628
Pinot Noir	174	0%	0%	58%	42%	0%	\$240,125	\$1,379	105	279	\$384,263
Shiraz	1,314	0%	0%	0%	39%	61%	\$3,081,647	\$2,346	1,025	2,339	\$5,485,676
Tempranillo	30	0%	0%	100%	0%	0%	\$39,065	\$1,300	29	59	\$77,181
Other red	67	0%	0%	62%	2%	37%	\$101,871	\$1,530	83	149	\$228,553
Red Total	2,233	0%	0%	12%	41%	48%	\$4,826,543	\$2,162	1,774	4,007	\$8,677,981
Chardonnay	731	0%	25%	58%	17%	0%	\$805,920	\$1,103	786	1,516	\$1,672,633
Muscat a Petit Grains Blanc	23	0%	0%	100%	0%	0%	\$20,836	\$920	9	32	\$29,479
Pinot Gris and Pinot Grigio	106	0%	0%	100%	0%	0%	\$135,136	\$1,276	288	394	\$503,070
Riesling	919	0%	0%	48%	39%	13%	\$1,486,221	\$1,617	1,978	2,897	\$4,686,108
Sauvignon Blanc	148	0%	0%	100%	0%	0%	\$154,056	\$1,042	162	310	\$322,494
Semillon	197	0%	2%	94%	4%	0%	\$151,201	\$768	26	222	\$170,957
Traminer	85	0%	0%	100%	0%	0%	\$91,598	\$1,072	27	113	\$120,945
Viognier	204	0%	0%	37%	62%	1%	\$312,010	\$1,528	193	398	\$607,512
Other white	24	0%	0%	99%	0%	1%	\$28,580	\$1,205	79	102	\$123,240
White Total	2,436	0%	8%	62%	25%	5%	\$3,185,558	\$1,308	3,549	5,985	\$8,236,438
Grand Total	4,669	0%	4%	38%	33%	25%	\$8,012,101	\$1,716	5,323	9,991	\$16,914,419

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

EDEN VALLEY

Current plantings by variety and year planted

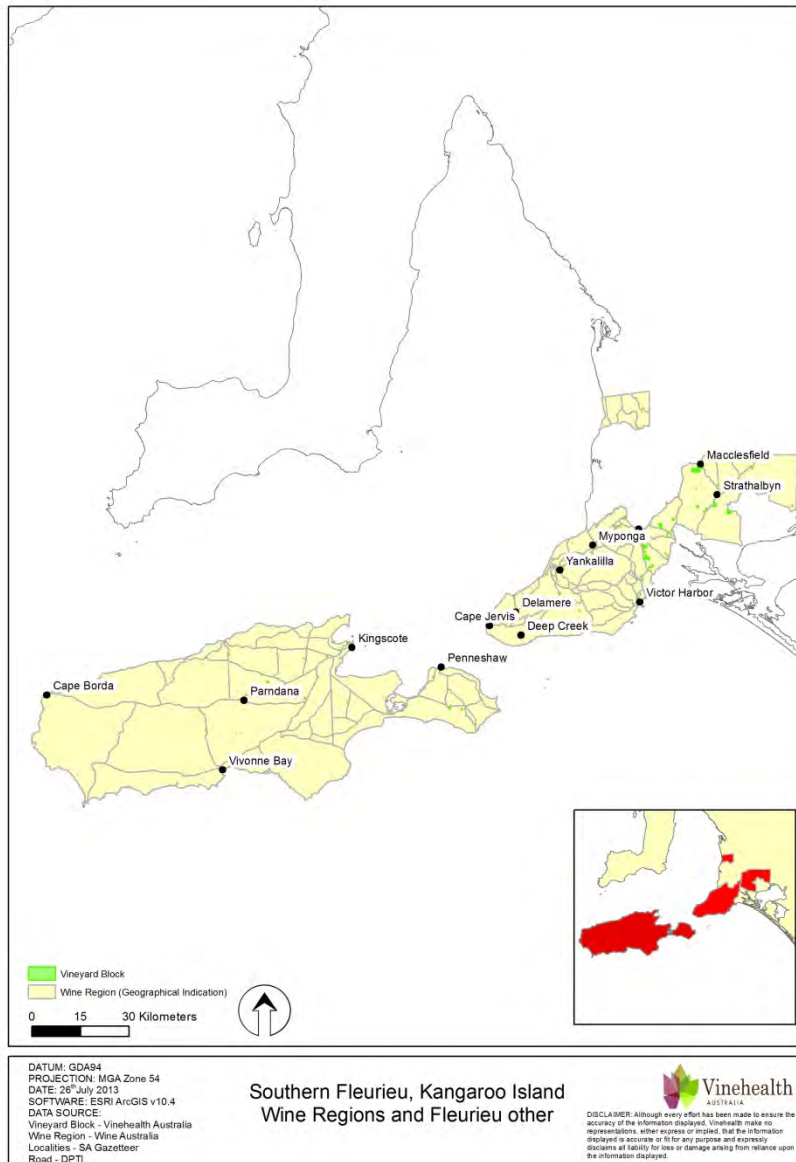
Source: Vinehealth Australia

Variety	Current area in hectares				Total area	% planted in
	Pre-2013	2013	2014	2015		2015
Red winegrapes						
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	303	4	0	2	309	1%
Grenache	20	0	0	0	20	0%
Mataro (Mourvedre)	10	0	0	0	10	0%
Merlot	72	0	0	0	72	0%
Meunier (Pinot Meunier)	2	0	0	0	2	0%
Other Red	7	1	1	0	9	1%
Petit Verdot	10	0	0	0	10	0%
Pinot Noir	62	0	0	1	63	1%
Sangiovese	2	0	0	0	2	0%
Shiraz	704	9	7	0	720	0%
Tempranillo	9	0	0	0	9	0%
Total red varieties	1,205	15	8	3	1,230	0%
White winegrapes						
Chardonnay	256	6	2	7	271	3%
Muscat A Petit Grains Blanc (White Frontignac)	7	0	0	0	7	0%
Other White	11	1	2	0	14	0%
Pinot Gris	34	1	0	0	36	0%
Riesling	539	0	5	7	551	1%
Roussanne	6	0	0	0	6	0%
Sauvignon Blanc	60	0	0	0	60	0%
Savagnin	3	0	0	0	3	0%
Semillon	25	0	0	0	25	0%
Traminer (Gewurztraminer)	17	2	1	0	19	0%
Viognier	41	1	0	0	42	0%
Total white varieties	1,000	12	10	14	1,035	1%
Unknown variety	14	0	0	0	14	0%
Total all varieties	2,219	27	17	16	2,280	1%

SA Winegrape Crush Survey

Regional Summary Report – 2016

Fleurieu Zone (other) Wine Region



FLEURIEU ZONE (OTHER)

Fleurieu zone (other) includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are near but outside the larger GI regions of Currency Creek, McLaren Vale and Langhorne Creek. The total area of vines included in this definition is 949 hectares.

Vintage overview

Overview of vintage statistics

The harvest from the Fleurieu zone (other) region was 3,083 tonnes in 2016, approximately 500 tonnes less than the 2015 crush.

Over the past five years, the average crush for this region is 3,159 tonnes implying that the 2016 yields were very close to average. The minimum crush over the period was 2,293 tonnes in 2014 and the highest was the 2015 crush of 3,603 tonnes.

The total estimated value of grapes from these regions decreased slightly from \$2.8 million to \$2.6 million but the average purchase value across all fruit increased from \$782 to \$852 per tonne. The average purchase price for Shiraz increased by \$208 to \$1,079 per tonne and Chardonnay increased by \$52 from \$564 to \$616 per tonne.

The price dispersion data shows that 88% of red tonnages and 59% of white tonnages were purchased at between \$600 and \$1500 – an upward shift in the price dispersion since last year.

Total plantings in this group of regions did not change and there were no reported new plantings.

FLEURIEU ZONE (OTHER)
Winegrape intake summary – vintage 2016

Variety	Tonnes purchased	E (less than \$300) ¹	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2,000)	Calc avg. purch. Total value purchased	value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Franc	-	na	na	na	na	na	\$0		14	14	\$15,264
Cabernet Sauvignon	205	0%	0%	83%	6%	11%	\$284,993	\$1,393	8	212	\$295,736
Durif	-	na	na	na	na	na	\$0		1	1	\$1,122
Merlot	64	4%	0%	96%	0%	0%	\$45,753	\$720	5	69	\$49,583
Sangiovese	-	na	na	na	na	na	\$0		12	12	\$13,356
Shiraz	723	1%	0%	89%	4%	6%	\$779,770	\$1,079	76	799	\$861,918
Tempranillo	-	na	na	na	na	na	\$0		3	3	\$3,816
Other red	2	na	na	na	na	na	\$3,600	\$1,800	5	7	\$12,960
Red Total	993	1%	0%	88%	4%	7%	\$1,114,115	\$1,122	124	1,117	\$1,253,756
Chardonnay	640	0%	78%	22%	0%	0%	\$393,781	\$616	3	642	\$395,320
Sauvignon Blanc	371	0%	17%	82%	2%	0%	\$251,009	\$676	174	545	\$368,470
Viognier	-	na	na	na	na	na	\$0		1	1	\$683
Other white	588	0%	13%	84%	2%	0%	\$448,105	\$762	189	778	\$592,286
White Total	1,599	0%	40%	59%	1%	0%	\$1,092,895	\$683	367	1,966	\$1,356,761
Grand Total	2,592	0%	25%	70%	2%	3%	\$2,207,011	\$852	491	3,083	\$2,610,517

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

FLEURIEU ZONE (OTHER)
Current plantings by variety and year planted

Source: Vinehealth Australia

Southern Fleurieu		Current area in hectares				% planted in
Variety	Pre-2013	2013	2014	2015	Total area	
Red varieties						
Cabernet Sauvignon	72	0	0	0	72	0%
Merlot	35	0	0	0	35	0%
Other Red	6	0	0	0	6	0%
Pinot Noir	29	0	0	0	29	0%
Shiraz	119	6	0	0	124	0%
White varieties						
Chardonnay	92	0	0	0	92	0%
Other White	4	0	0	0	4	0%
Pinot Gris	25	0	0	0	25	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	69	0	0	0	69	0%
Semillon	22	0	0	0	22	0%
Verdelho	1	0	0	0	1	0%
Viognier	9	0	0	0	9	0%
Unknown variety	3	0	0	0	3	0%
Total all varieties	490	6	0	0	496	0%

FLEURIEU ZONE (OTHER)

Current plantings by variety and year planted

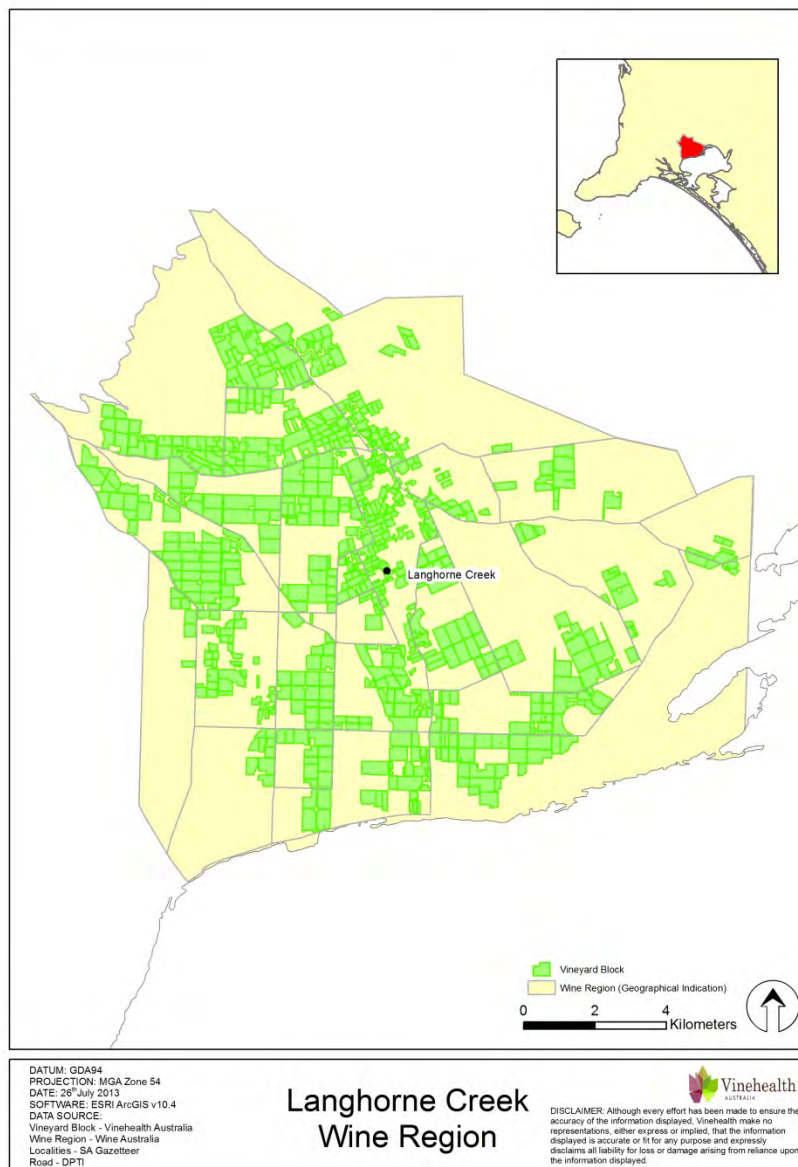
Source: Vinehealth Australia

Kangaroo Island

Kangaroo Island		Current area in hectares				% planted in
Variety	Pre-2013	2013	2014	2015	Total area	2015
Red varieties						
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	41	0	0	0	41	0%
Merlot	5	0	0	0	5	0%
Other Red	7	0	0	0	7	0%
Shiraz	49	0	0	0	49	0%
White varieties						
Chardonnay	8	0	0	0	8	0%
Other White	4	0	0	0	4	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	7	0	0	0	7	0%
Unknown variety	5	0	0	0	5	0%
Total all varieties	135	0	0	0	135	0%

Fleurieu zone - other

Fleurieu zone - other		Current area in hectares				% planted in
Variety	Pre-2013	2013	2014	2015	Total area	2015
Red varieties						
Cabernet Sauvignon	37	0	0	0	37	0%
Other Red	21	0	1	0	21	0%
Shiraz	124	4	0	0	128	0%
White varieties						
Chardonnay	29	0	0	0	29	0%
Other White	11	0	0	0	11	0%
Pinot Gris	26	0	0	0	26	0%
Sauvignon Blanc	30	0	0	0	30	0%
Unknown variety	34	0	0	0	34	0%
Total all varieties	311	4	1	0	315	0%



SA Winegrape Crush Survey

Regional Summary Report – 2016

Langhorne Creek Wine Region

LANGHORNE CREEK

Vintage overview

Vintage report

The Langhorne Creek wine region has enjoyed a lively 2016 vintage, with the crush showing magnificent fresh fruit flavours, intense colour and Cabernet Sauvignon an exciting stand out for the region.

Consistent with the past few years, the grape harvest for 2016 kicked off at the very end of January with fruit for sparkling base. Fruit for whites followed through to late February with reds hitting their stride at the start of March. With the bulk of vintage over by Easter in late March, the beautiful mild end to the season saw fruit still coming in post-Easter during the first weeks of April.

It was a challenging irrigation season with regular, but only light winter rainfall pre-empting a dry late-winter, spring and early summer period. However, the warm dry spring provided superb conditions for flowering and fruit set which was reflected in the good yields across the district, especially welcome in Cabernet Sauvignon vineyards after the low yield in this variety the previous year.

Summer brought cooler weather and some welcome rain at an ideal time. The reliable cooling 'lake breezes' provided a long cool ripening period and controlled the disease risk from the late season rainfall. The region celebrated significantly cooler nights than other central regions, and unusually, parts of the Adelaide Hills wine region harvested red grapes before Langhorne Creek looked like starting.

The mild conditions were ideal for early flavour and phenolic ripeness at lower Baumés, leading to a generally steady harvest pattern. Early flavour-ripeness, coupled with the ideal weather, provided the opportunity to pick to style without the risk of over-ripe characters.

A season typified by even fruit set and berry development led to excellent vine balance, and fruit qualities certainly worth celebrating. The star variety this

season is Cabernet Sauvignon with early wine quality putting smiles on the faces of growers and winemakers alike.

Lian Jaensch - Langhorne Creek Grape and Wine Inc.

Overview of vintage statistics

The harvest from the Langhorne Creek region in 2016 was 60,119 tonnes, a 50% increase on the 2015 harvest and 24% above the long-term average, making the region the second largest in SA by volume in 2016 after the Riverland. Over the past five years, the average crush for Langhorne Creek has been 48,652 tonnes. This year's vintage was the highest since 2008 and the fourth highest on record.

The value of fruit from the region was estimated to be nearly \$46 million compared with \$30 million in 2015, reflecting the substantial increase in tonnage.

The weighted average purchase price for the major red varieties dropped slightly; Cabernet Sauvignon decreased from \$833 per tonne in 2015 to \$780 in 2016 and Shiraz decreased from \$898 per tonne last year to \$858. On the other hand, the average price for the major white varieties increased: Chardonnay was up from \$462 to \$512 per tonne.

The price dispersion data shows that 89% of red tonnages were purchased at between \$600 and \$1500, while for the whites, 43% were purchased between \$600 and \$1500 and 51% between \$300 and \$600.

There were 21 hectares of new plantings in Langhorne Creek in the 2015-16 season, compared with 57 hectares the previous year. The total area of vineyards in the region decreased from 5,816 hectares to 5,798 hectares.

LANGHORNE CREEK
Winegrape intake summary – vintage 2016

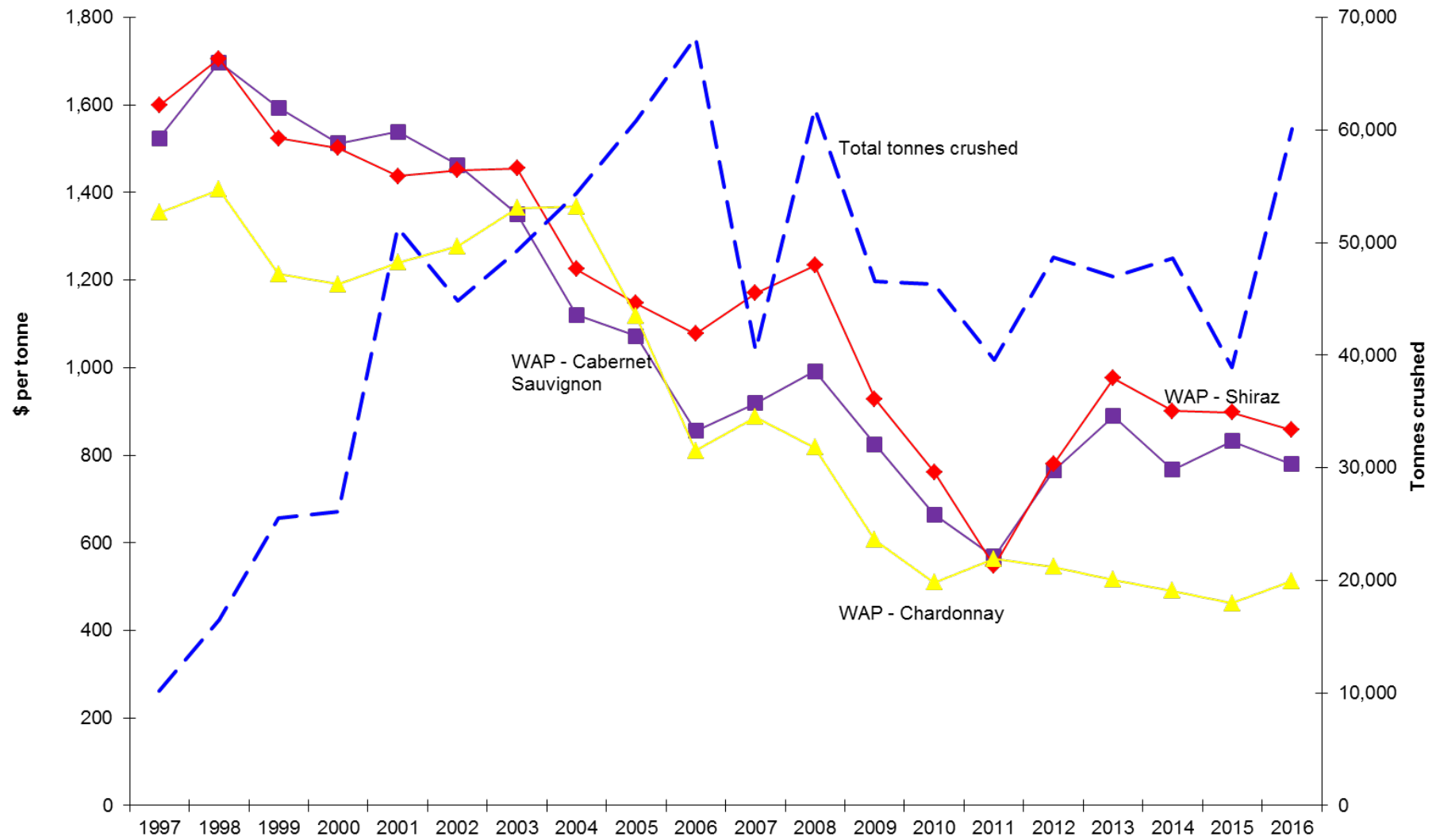
Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Sauvignon	11,214	0%	11%	87%	1%	1%	\$8,744,867	\$780	7,065	18,279	\$14,253,915
Dolcetto	73	0%	31%	69%	0%	0%	\$53,318	\$728	-	73	\$53,318
Durif	-	na	na	na	na	na	\$0		165	165	\$133,221
Grenache	153	0%	16%	84%	0%	0%	\$96,888	\$634	1,112	1,265	\$801,732
Malbec	732	0%	0%	92%	0%	8%	\$699,099	\$955	66	798	\$762,206
Merlot	2,165	0%	13%	87%	0%	0%	\$1,430,445	\$661	2,297	4,461	\$2,948,123
Pinot Noir	781	0%	0%	100%	0%	0%	\$552,225	\$707	885	1,666	\$1,178,305
Shiraz	12,121	0%	6%	91%	1%	2%	\$10,401,194	\$858	10,178	22,299	\$19,135,491
Tempranillo	-	na	na	na	na	na	\$0		3	3	\$2,580
Other red	178	0%	13%	85%	0%	2%	\$128,740	\$724	85	262	\$189,990
Red Total	27,417	0%	8%	89%	1%	2%	\$22,106,776	\$806	21,856	49,272	\$39,458,882
Chardonnay	4,543	7%	69%	24%	0%	0%	\$2,326,230	\$512	1,834	6,376	\$3,265,126
Muscat a Petit Grains Blanc	-	na	na	na	na	na	\$0		19	19	\$11,383
Pinot Gris and Pinot Grigio	583	0%	0%	100%	0%	0%	\$547,714	\$939	200	784	\$735,624
Sauvignon Blanc	834	0%	0%	100%	0%	0%	\$608,593	\$729	441	1,275	\$930,022
Traminer	-	na	na	na	na	na	\$0		382	382	\$223,606
Viognier	-	na	na	na	na	na	\$0		25	25	\$14,714
Other white	163	na	na	na	na	na	\$101,172	\$622	1,823	1,985	\$1,234,504
White Total	6,123	5%	51%	43%	0%	0%	\$3,583,708	\$585	4,724	10,847	\$6,414,979
Grand Total	33,540	1%	16%	81%	1%	1%	\$25,690,484	\$766	26,579	60,119	\$45,873,861

¹ Percentages reflect pricing grade's share of purchases for each variety

² It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

LANGHORNE CREEK

Historical Weighted Average Price vs tonnes crushed



LANGHORNE CREEK

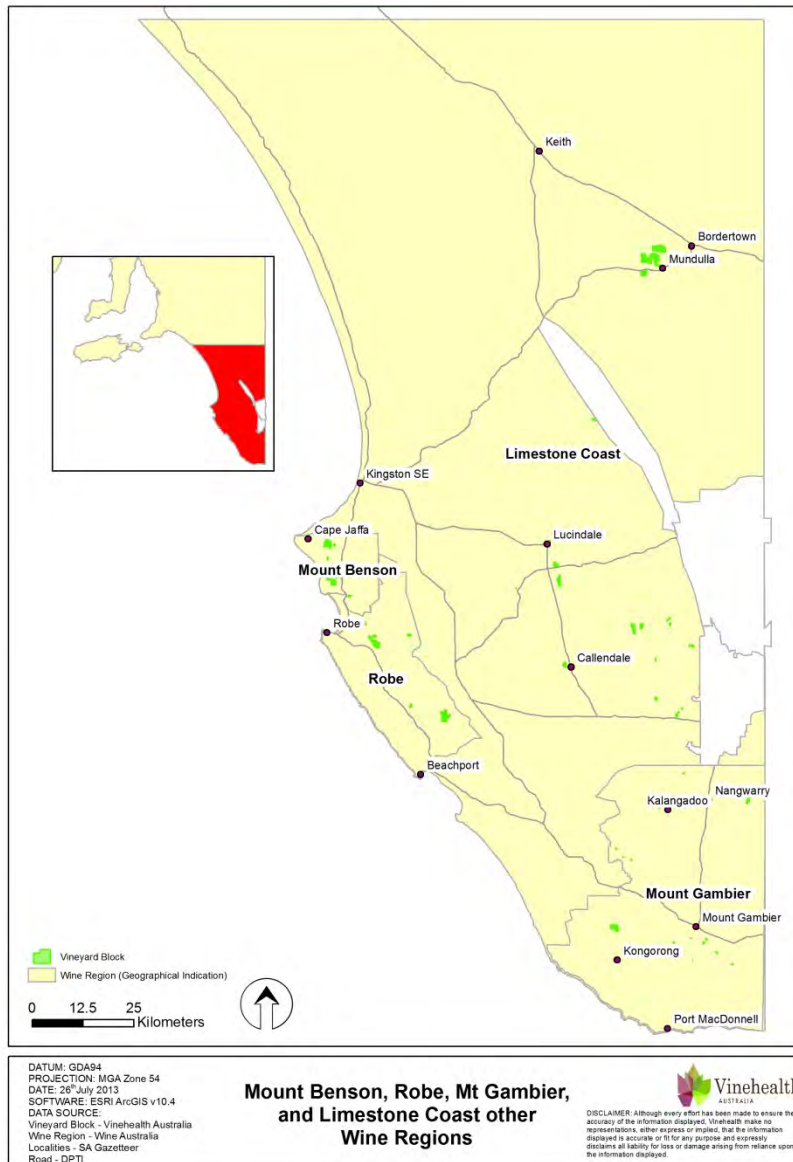
Current plantings by variety and year planted

Source: Vinehealth Australia

	Current area in hectares					% planted in
Variety	Pre-2013	2013	2014	2015	Total area	2015
Red winegrapes						
Cabernet Franc	8	0	0	0	8	0%
Cabernet Sauvignon	1,846	14	17	2	1,879	0%
Dolcetto	11	0	0	0	11	0%
Grenache	78	0	0	0	78	0%
Lagrein	10	0	0	0	10	0%
Malbec	58	2	19	3	81	4%
Merlot	371	0	0	0	371	0%
Nebbiolo	8	0	0	0	8	0%
Other Red	130	2	9	5	147	4%
Petit Verdot	13	0	0	0	13	0%
Sangiovese	30	0	0	0	30	0%
Shiraz	2,153	11	12	5	2,181	0%
Total red varieties	4,717	30	57	16	4,818	0%
White winegrapes						
Chardonnay	560	0	0	0	560	0%
Other White	18	0	0	0	18	0%
Pinot Gris	39	0	0	5	44	11%
Riesling	162	0	0	0	162	0%
Sauvignon Blanc	64	0	0	0	64	0%
Semillon	4	0	0	0	4	0%
Traminer (Gewurztraminer)	15	0	0	0	15	0%
Verdelho	41	0	0	0	41	0%
Viognier	16	0	0	0	16	0%
Total white varieties	919	0	0	5	924	1%
Rootstock Block	6	0	0	0	6	0%
Unknown variety	50	0	0	0	50	0%
Total all varieties	5,691	30	57	21	5,798	0%

SA Winegrape Crush Survey Regional Summary Report – 2016

Limestone Coast (Other) Wine Region



LIMESTONE COAST (OTHER)

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 2,834 hectares.

Vintage Overview – Mount Benson

Mt Benson had one of the driest lead-ups to the season on record (noting ours only go back 20 years). The winter-spring period was the second driest after 2006, and 40% below the average. This played a role in another unprecedentedly early start to the season. But the New Year seemed to mark a new beginning when it came to our weather and we had a series of long-overdue rain events that were met with mixed feelings by winemakers and growers. With our free-draining soil profile, quality seemed to hold up in spite of the wet, although there were isolated reports of crop loss due to berry split, depending on the variety and growth stage.

Winemakers in the area all seem extremely happy with the 2016 wines. Sauvignon Blanc, one of our stand-out varieties, fared reasonably well this year; however Pinot Gris for us was the front-runner in terms of whites. Chardonnay also produced excellent wines.

For reds, not the cracking vintage that 2015 was, but still very much above average. Cool to average conditions later in summer provided for terrific results in the well-balanced vineyards. The young wines display outstanding, bright and elegant characters reminiscent of a cooler growing season. Vineyards carrying too heavy a load struggled, especially Shiraz and Merlot.

Anna Hooper - Cape Jaffa Wines

Vintage overview

Overview of vintage statistics

The harvest from the Limestone Coast zone (other) was 20,667 tonnes, compared with 14,326 tonnes in 2015 – an increase of 44%. The five-year average crush for this group of regions is 16,393 tonnes. The 2016 crush was the highest since 2009, while the 2014 crush of 12,728 tonnes was the lowest since 2002.

The total estimated value of fruit from this area was \$19.5 million compared with \$12.5 million last year. This represents over a 50% increase in value.

As well as the significant increase in tonnages, average prices of all the major red varieties increased: Shiraz up by \$52 to \$1055 per tonne, Cabernet Sauvignon up by \$155 to \$1055 per tonne and Merlot up by \$37 to \$797 per tonne.

The price dispersion data shows that 95% of red tonnages were purchased at between \$600 and \$1500, while for the whites, 75% were purchased between \$600 and \$1500 and 25% between \$300 and \$600.

There were no changes to the plantings in these regions over the 2015-16 planting season.

LIMESTONE COAST (OTHER)
Winegrape intake summary – vintage 2016

*Incorporates Mount Benson (2,326 tonnes), Mt. Gambier (945 tonnes), Robe (2,609 tonnes)
and Limestone Coast zone – other including Bordertown (14,788 tonnes)*

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Franc	27	0%	0%	100%	0%	0%	\$26,700	\$1,000	337	364	\$363,860
Cabernet Sauvignon	2,431	0%	2%	96%	0%	2%	\$2,564,188	\$1,055	3,580	6,012	\$6,340,118
Malbec	68	0%	0%	100%	0%	0%	\$68,100	\$1,000	170	238	\$237,750
Mataro	186	0%	0%	100%	0%	0%	\$171,138	\$920	181	367	\$337,483
Merlot	628	0%	29%	71%	0%	0%	\$500,521	\$797	2,048	2,676	\$2,132,581
Petit Verdot	120	0%	0%	100%	0%	0%	\$111,730	\$935	376	496	\$463,665
Pinot Noir	259	0%	0%	100%	0%	0%	\$289,266	\$1,118	311	570	\$637,183
Shiraz	2,801	0%	0%	99%	0%	1%	\$2,954,724	\$1,055	2,811	5,612	\$5,919,892
Tempranillo	-	na	na	na	na	na	\$0		36	36	\$36,756
Other red	59	0%	0%	100%	0%	0%	\$53,208	\$897	7	66	\$59,486
Red Total	6,579	0%	3%	95%	0%	1%	\$6,739,574	\$1,024	9,857	16,436	\$16,528,774
Chardonnay	660	0%	57%	43%	0%	0%	\$393,647	\$597	1,761	2,421	\$1,444,670
Pinot Gris and Pinot Grigio	314	0%	0%	100%	0%	0%	\$290,979	\$928	16	330	\$306,172
Sauvignon Blanc	1,110	0%	13%	87%	0%	0%	\$885,506	\$798	165	1,275	\$1,017,177
Other white	20	0%	0%	100%	0%	0%	\$15,890	\$798	185	205	\$163,912
White Total	2,103	0%	25%	75%	0%	0%	\$1,586,022	\$754	2,128	4,231	\$2,931,931
Grand Total	8,682	0%	8%	91%	0%	1%	\$8,325,596	\$959	11,985	20,667	\$19,460,705

¹ Percentages reflect pricing grade's share of purchases for each variety

² It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

LIMESTONE COAST (OTHER)

Current plantings by variety and year planted

Source: Vinehealth Australia

Bordertown		Current area in hectares				% planted in
Variety	Pre-2013	2013	2014	2015	Total area	2015
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	333	0	0	0	333	0%
Total red varieties	1,122	0	0	0	1,122	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	10	0	0	0	10	0%
Verdelho	6	0	0	0	6	0%
Total white varieties	131	0	0	0	131	0%
Total all varieties	1,254	0	0	0	1,254	0%

Robe

Robe	Current area in hectares					% planted in
Variety	Pre-2013	2013	2014	2015	Total area	2015
Red winegrapes						
Cabernet Sauvignon	226	0	9	0	235	0%
Merlot	58	0	0	0	58	0%
Other Red	2	3	0	0	5	0%
Pinot Noir	46	0	0	0	46	0%
Shiraz	171	0	0	0	171	0%
Total red varieties	502	3	9	0	515	0%
White winegrapes						
Chardonnay	106	0	0	0	106	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	177	0	0	0	177	0%
Total all varieties	679	3	9	0	691	0%

Mount Gambier

Mount Gambier		Current area in hectares				% planted in
Variety	Pre-2013	2013	2014	2015	Total area	2015
Red winegrapes						
Cabernet Sauvignon	13	0	0	0	13	0%
Merlot	1	0	0	0	1	0%
Pinot Noir	79	0	0	0	79	0%
Total red varieties	93	0	0	0	93	0%
White winegrapes						
Chardonnay	42	0	0	0	42	0%
Pinot Gris	33	0	0	0	33	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	117	0	0	0	117	0%
Other white	2	0	0	0	2	0%
Total white varieties	200	0	0	0	200	0%
Total all varieties	292	0	0	0	292	0%

Mount Benson

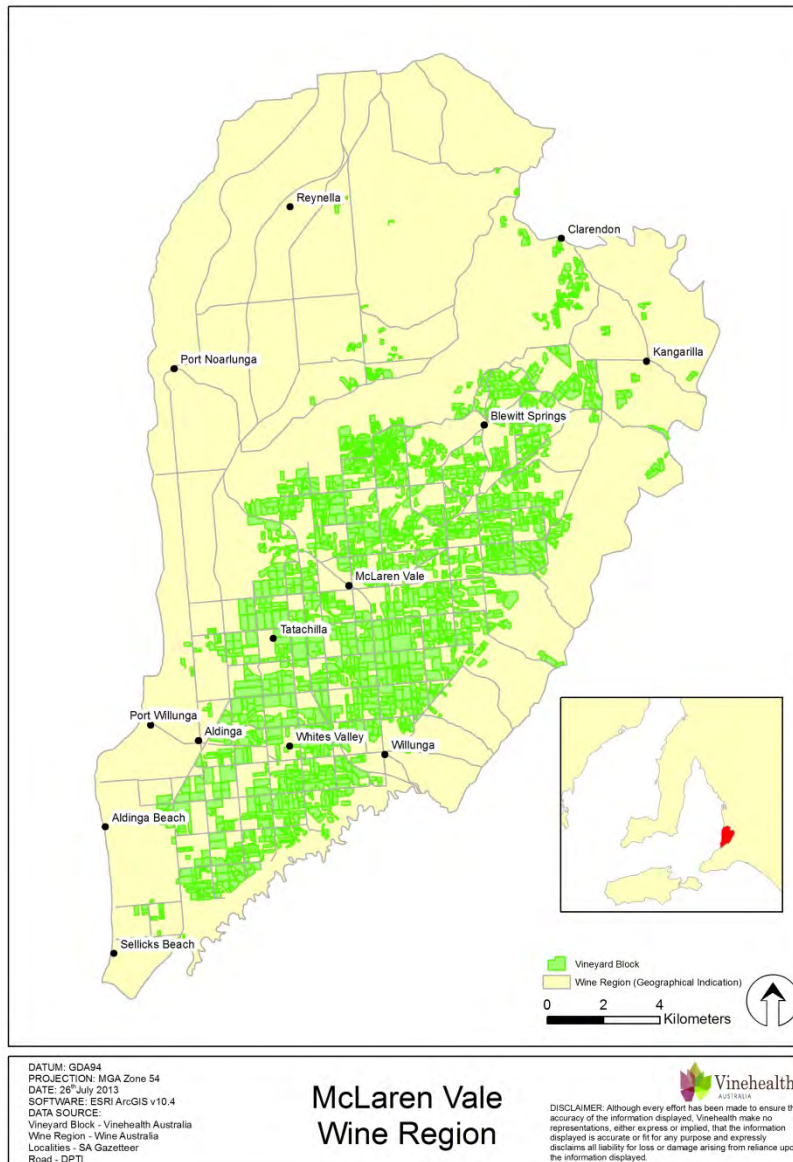
Variety	Current area in hectares				% planted in	
	Pre-2013	2013	2014	2015	Total area	2015
Red winegrapes						
Cabernet Franc	3	0	0	0	3	0%
Cabernet Sauvignon	115	0	0	0	115	0%
Merlot	52	0	0	0	52	0%
Petit Verdot	2	0	0	0	2	0%
Pinot Noir	2	0	0	0	2	0%
Shiraz	167	0	0	0	167	0%
Total red varieties	340	0	0	0	340	0%
White winegrapes						
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 white varieties	164	0	0	0	164	0%
Total all varieties	504	0	0	0	504	0%

Limestone Coast zone - other

Limestone Coast zone - other		Current area in hectares				% planted in
Variety	Pre-2013	2013	2014	2015	Total area	2015
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%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other white	3	0	0	0	3	0%
Total white varieties	57	0	0	0	57	0%
Total all varieties	597	0	0	0	597	0%

SA Winegrape Crush Survey Regional Summary Report – 2016

McLaren Vale Wine Region



MCLAREN VALE

Vintage Overview

Vintage report

Vintage 2016 will be remembered for a warm and dry spring, which promoted shoot growth and flowering, followed up by heavy rain immediately before harvest which helped boost vineyard yields. At harvest vines produced some of the bigger crops we have seen since 2004, but they generally weren't overcropped as vine growth was balanced.

The warm spring and early summer days and nights ensured that vines grew well and then set well.

The 2015/16 growing season had some similarities with the lean 2006/07 and 2007/08 seasons. In all three, growing season rainfall was less than 50% of the long term average. Overall, rainfall for winter was lower than average, due to a dry June 2015, and this was followed by long dry periods where no effective rain fell until the first week of February. Disease pressure was generally low due to the long dry periods, following on from dry 2013 and 2014 springs as well.

Irrigation application was vital to crop health and the local recycled water system, that supplies 45-50% of the region's irrigation water, was stretched. Rationing of this water source was flagged in January but fortunately full allocations were maintained. Growers were able to compensate for the shortfall in rainfall with improved irrigation techniques and an uninterrupted supply.

White grape harvest started at the end of January, with sparkling base wines and vineyards destined for light white wine styles.

At the beginning of February, immediately before the bulk of the region was to be harvested, McLaren Vale had double its average monthly rainfall over two days due to one storm. However, far from having a negative effect, the intense

rain event increased the bunch weight of crops at harvest and relieved any water stress on the vines. The rain also delayed the start of red grape picking into the middle of February. March had above average rainfall, but fortunately this fell after a high percentage of harvest was complete. Powdery Mildew flared up and Botrytis increased but only on the latest picked fruit.

James Hook – Editor, McLaren Vale Grape Wine & Tourism Crop Watch

Overview of vintage statistics

The reported harvest from McLaren Vale was 40,997 tonnes in 2016, 12,000 tonnes above the 2015 harvest and 21% above the five year average crush of 33,901 tonnes. This year's vintage was the largest in the past five years with the smallest being the 2015 harvest at 28,434 tonnes. (This may have been partly attributable to a low regional response rate.)

The total estimated value of the fruit was \$65.7 million, reflecting the increased tonnage and a small rise in the average value of the fruit. The average price of Cabernet Sauvignon increased by \$158 to \$1529 per tonne, its highest average price since 2003, while the price of Chardonnay and Shiraz were similar to last year – consolidating big jumps in their respective average price in 2015.

The price dispersion data shows that 65% of red fruit was purchased at over \$1500, compared with 45% in 2015. For the whites, 54% was purchased between \$600 and \$1500 and only 6% at above \$1500.

There were 43 hectares of new plantings in McLaren Vale in spring 2015, compared with 123 hectares in 2014. All were red varieties, with over half being Shiraz. There was a net decrease in area of 111 hectares.

MCLAREN VALE
Winegrape intake summary – vintage 2016
Red varieties

Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Barbera	43	0%	0%	0%	100%	0%	\$68,352	\$1,573	5	49	\$76,435
Cabernet Franc	59	0%	0%	93%	5%	2%	\$70,520	\$1,196	5	64	\$76,646
Cabernet Sauvignon	4,142	0%	0%	67%	22%	12%	\$6,334,622	\$1,529	3,213	7,355	\$11,248,232
Grenache	1,018	0%	1%	44%	31%	23%	\$1,648,753	\$1,620	789	1,806	\$2,926,278
Malbec	22	0%	0%	94%	5%	1%	\$28,301	\$1,288	31	53	\$68,352
Mataro	300	0%	0%	31%	45%	24%	\$494,572	\$1,650	168	468	\$772,415
Merlot	670	0%	0%	86%	14%	0%	\$650,740	\$972	513	1,183	\$1,149,388
Nero D'Avola	19	0%	0%	32%	58%	11%	\$31,881	\$1,718	45	64	\$109,071
Petit Verdot	122	0%	0%	90%	9%	1%	\$116,601	\$955	136	258	\$246,467
Pinot Noir	342	0%	1%	99%	0%	0%	\$285,714	\$834	38	380	\$317,334
Sangiovese	139	0%	0%	28%	72%	0%	\$207,232	\$1,489	232	371	\$552,571
Shiraz	15,498	0%	1%	22%	50%	27%	\$27,942,907	\$1,803	8,631	24,129	\$43,503,830
Tempranillo	208	0%	0%	26%	50%	24%	\$365,457	\$1,755	98	307	\$538,174
Other red	160	0%	0%	6%	35%	59%	\$315,861	\$1,978	184	343	\$679,277
Red Total	22,742	0%	1%	35%	42%	23%	\$38,561,513	\$1,696	14,088	36,830	\$62,264,470

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

MCLAREN VALE
Winegrape intake summary – vintage 2016
White varieties

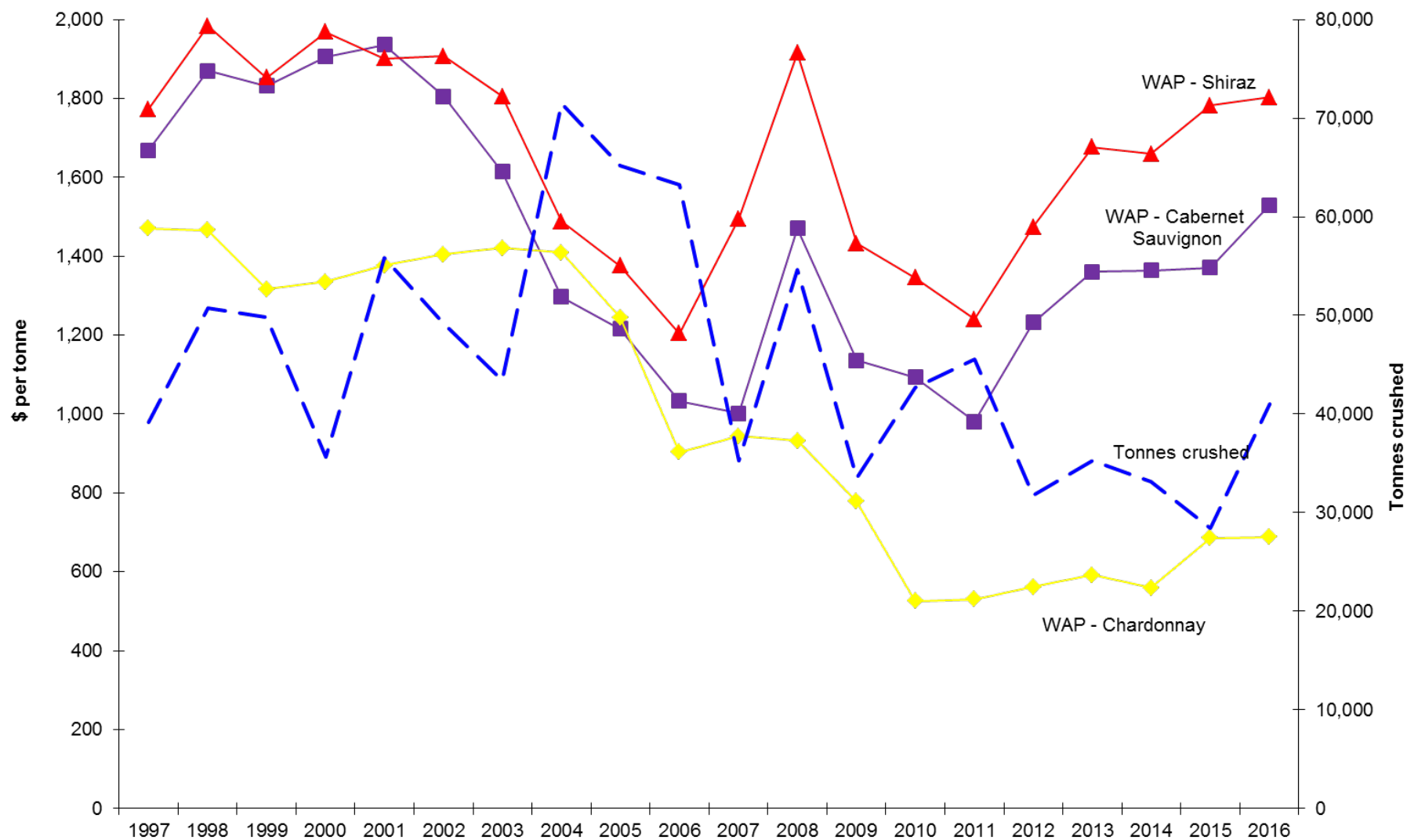
Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Chardonnay	1,981	2%	51%	46%	1%	0%	\$1,362,153	\$688	466	2,448	\$1,682,876
Chenin blanc	53	0%	0%	100%	0%	0%	\$57,838	\$1,100	39	92	\$101,255
Marsanne	47	0%	0%	100%	0%	0%	\$47,901	\$1,014	34	81	\$81,972
Muscat a Petit Grains blanc	52	0%	0%	33%	67%	0%	\$69,102	\$1,330	3	55	\$73,572
Palomino and Pedro Ximenes	-	na	na	na	na	na	\$0		33	33	\$27,007
Riesling	100	0%	0%	100%	0%	0%	\$109,100	\$1,091	35	135	\$147,055
Sauvignon blanc	159	0%	23%	77%	0%	0%	\$115,940	\$729	194	353	\$257,469
Semillon	40	0%	34%	65%	0%	2%	\$26,630	\$661	175	215	\$142,309
Verdelho	68	0%	0%	100%	0%	0%	\$93,220	\$1,367	11	79	\$108,396
Viognier	178	0%	8%	80%	7%	5%	\$198,760	\$1,117	113	291	\$324,927
Other white	195	0%	0%	42%	57%	1%	\$254,257	\$1,302	189	384	\$500,357
White Total	2,874	2%	37%	54%	6%	0%	\$2,334,900	\$812	1,293	4,167	\$3,447,194
Grand Total	25,616	0%	5%	37%	38%	20%	\$40,896,413	\$1,597	15,381	40,997	\$65,711,664

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

MCLAREN VALE

Historical Weighted Average Price vs tonnes crushed



MCLAREN VALE

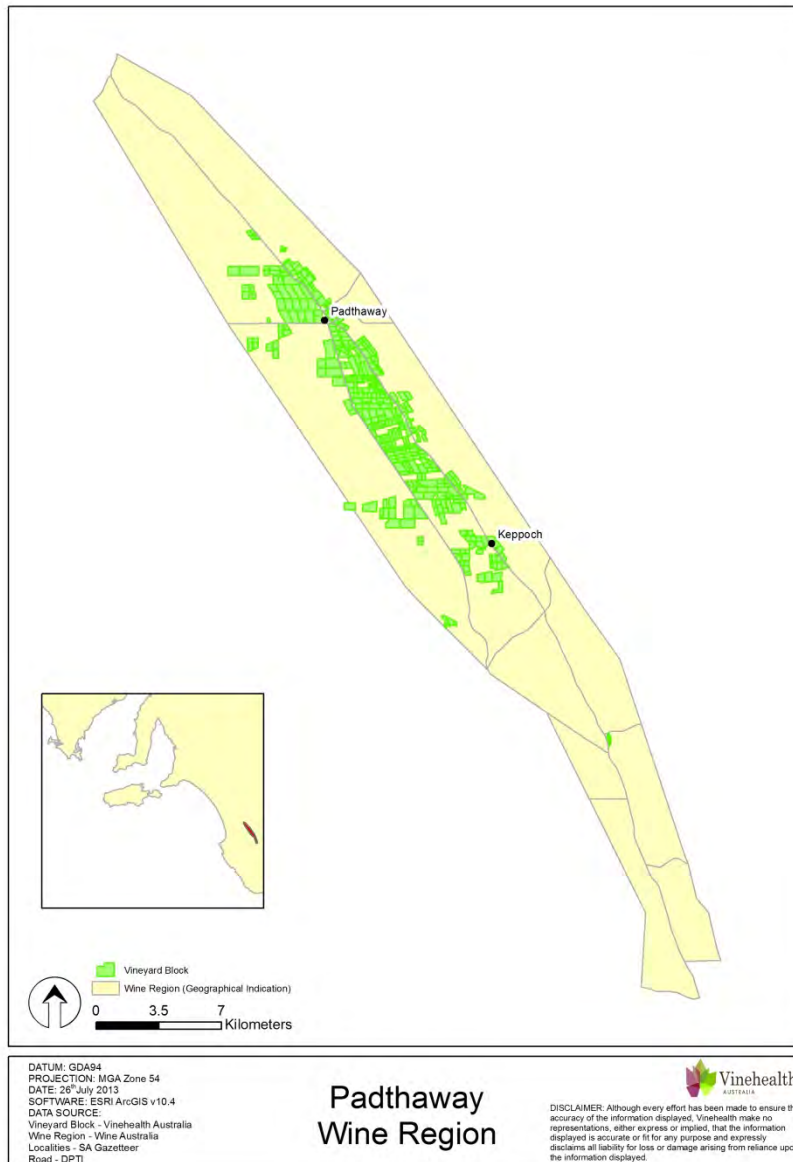
Current plantings by variety and year planted

	Current area in hectares					% planted in
Variety	Pre-2013	2013	2014	2015	Total area	2015
Red winegrapes						
Barbera	10	1	0	0	12	0%
Cabernet Franc	27	0	0	0	27	0%
Cabernet Sauvignon	1,257	14	21	12	1,304	1%
Grenache	451	5	2	1	459	0%
Mataro (Mourvedre)	71	5	6	2	84	2%
Merlot	236	0	0	0	236	0%
Other Red	77	7	6	1	91	1%
Petit Verdot	47	0	0	0	47	0%
Pinot Noir	57	0	0	0	57	0%
Sangiovese	54	0	0	0	54	0%
Shiraz	3,807	61	84	25	3,978	1%
Tempranillo	57	3	0	2	62	3%
Total red varieties	6,151	97	120	43	6,410	1%
White winegrapes						
Chardonnay	391	0	2	0	394	0%
Chenin Blanc	18	0	0	0	18	0%
Marsanne	12	0	0	0	12	0%
Muscat A Petit Grains Blanc (White Frontignac)	12	0	0	0	12	0%
Other White	47	2	0	0	49	0%
Pinot Gris	20	0	0	0	20	0%
Riesling	34	0	0	0	34	0%
Sauvignon Blanc	82	0	0	0	82	0%
Semillon	42	0	0	0	42	0%
Verdelho	19	0	0	0	19	0%
Viognier	58	0	0	0	58	0%
Total white varieties	733	2	3	0	740	0%
Rootstock Block	4	0	0	0	4	0%
Unknown variety	198	0	0	0	198	0%
Total all varieties	7,088	99	123	43	7,353	1%

Source:
Vinehealth Australia

SA Winegrape Crush Survey Regional Summary Report – 2016

Padthaway Wine Region



PADTHAWAY

Vintage overview

Vintage report

The 2016 season commenced once again with low winter and spring rainfall making it one of the driest years recorded. Because of this growers had to be vigilant when it came to supplementary irrigation in order to optimise the resource to maintain a fully functional canopy. We were fortunate not to receive the extreme high temperatures over 40 degrees as was seen in Vintage 2015.

Again due to the warm dry conditions presented to us, no significant disease pressure occurred. This also led to a reduction in the number of spray applications.

Vintage commenced on the 28th of January, similar in timing to last year, with the harvesting of Sauvignon Blanc followed closely by Pinot Gris and Chardonnay. As we experienced in 2015, we had another compressed vintage with most of the fruit being harvested over a two to three week period and with the majority being picked before Easter. The compressed vintages are becoming more frequent and I wonder if this is what we should expect in the coming years adding pressure to the whole supply chain from vineyard to the winery.

Yields increased to a more average year in comparison to the last two years. Warmer temperatures during flowering helped to promote an ideal fruit set resulting in a good number of berries per bunch. It was also pleasing to see Cabernet Sauvignon return to a more reasonable yield.

Winemakers are very happy with the quality of fruit delivered. Early indications are showing great colour with depth and balanced flavours in the reds and great varietal flavours in the whites

*Andrew Bryson, President
Padthaway Grape Growers Association*

Overview of vintage statistics

The harvest from the Padthaway region in 2016 was 44,922 tonnes – the third highest crush from the region on record and 42% above the five-year average of 31,723 tonnes. This year's vintage was the largest since 2008, while last year's was the smallest since 2007.

The total estimated value of grapes almost doubled from \$21 million to over \$38 million, reflecting a slight increase in average grape prices as well as the larger tonnage. As well as doubling in volume, the average price for Cabernet Sauvignon increased by \$81 to \$1068 per tonne, while Shiraz increased in volume by over 70% and the average price increased by \$66 per tonne to \$1083 per tonne. In the whites, Pinot Gris increased by 50% in volume and by \$6 in average price to \$999 per tonne, the average price for Chardonnay decreased by \$89 to \$526 per tonne and Sauvignon Blanc decreased by \$39 to \$786 per tonne.

The price dispersion data shows that 95% of red tonnages were purchased at \$600 or more, while for the whites, 54% were purchased at \$600 or more compared with 62% in 2015.

There were only eight hectares of new plantings recorded in the region in 2015 – all Shiraz. This compares with 41 hectares in 2014 and 48 hectares in 2013 – all Cabernet Sauvignon. There was a net decrease of 75 hectares in vineyard area in the region – almost all losses being in white varieties.

PADTHAWAY

Winegrape intake summary – vintage 2016

Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Franc	69	0%	0%	100%	0%	0%	\$45,322	\$661	-	69	\$45,322
Cabernet Sauvignon	5,824	0%	1%	95%	2%	1%	\$6,220,199	\$1,068	2,132	7,956	\$8,497,120
Malbec	249	0%	0%	100%	0%	0%	\$249,350	\$1,000	660	909	\$909,060
Merlot	1,328	0%	50%	50%	0%	0%	\$792,267	\$596	1,016	2,345	\$1,398,436
Pinot Noir	1,026	0%	2%	98%	0%	0%	\$847,280	\$826	350	1,376	\$1,136,182
Sangiovese	-	na	na	na	na	na	\$0		48	48	\$48,761
Shiraz	7,088	0%	1%	96%	2%	1%	\$7,677,207	\$1,083	4,210	11,298	\$12,237,625
Tempranillo	-	na	na	na	na	na	\$0		9	9	\$8,889
Other red	-	na	na	na	na	na	\$0		5	5	\$5,384
Red Total	15,585	0%	5%	92%	2%	1%	\$15,831,625	\$1,016	8,430	24,015	\$24,286,777
Arneis	-	na	na	na	na	na	\$0		11	11	\$7,361
Chardonnay	8,503	2%	68%	29%	0%	0%	\$4,474,882	\$526	4,322	12,824	\$6,749,384
Pinot Gris and Pinot Grigio	2,633	0%	0%	100%	0%	0%	\$2,629,533	\$999	515	3,148	\$3,144,342
Riesling	350	0%	15%	85%	0%	0%	\$324,480	\$927	2,072	2,422	\$2,244,210
Sauvignon Blanc	1,303	0%	0%	100%	0%	0%	\$1,024,416	\$786	114	1,417	\$1,114,196
Traminer	181	0%	0%	100%	0%	0%	\$117,559	\$650	234	414	\$269,412
Verdelho	-	na	na	na	na	na	\$0		281	281	\$186,006
Viognier	98	0%	0%	100%	0%	0%	\$98,030	\$1,000	239	337	\$337,030
Other white	46	na	na	na	na	na	\$11,430	\$250	6	52	\$13,050
White Total	13,113	2%	45%	54%	0%	0%	\$8,680,330	\$662	7,794	20,907	\$14,064,992
Grand Total	28,698	1%	23%	74%	1%	1%	\$24,511,955	\$854	16,225	44,922	\$38,351,769

¹ Percentages reflect pricing grade's share of purchases for each variety

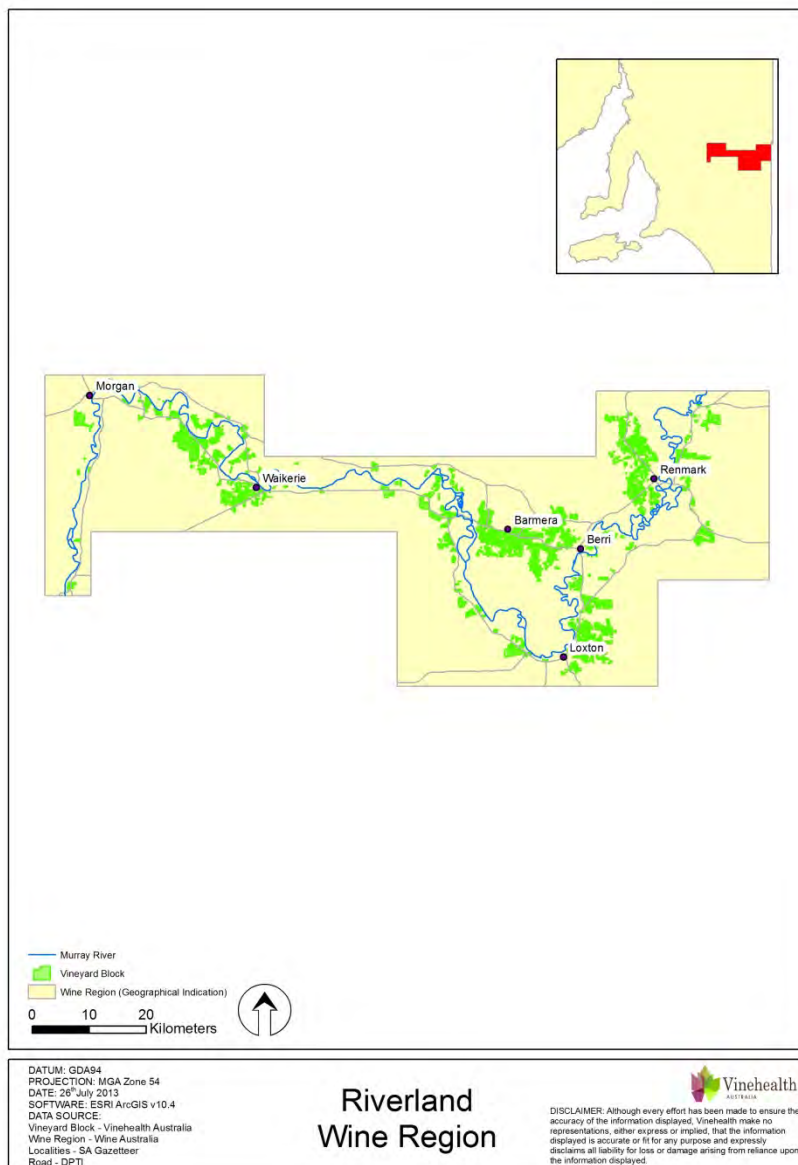
² It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

PADTHAWAY

Current plantings by variety and year planted

Source: Vinehealth Australia

Variety	Current area in hectares				Total area	% planted in
	Pre-2013	2013	2014	2015		2015
Red winegrapes						
Cabernet Franc	12	0	0	0	12	0%
Cabernet Sauvignon	844	48	41	0	933	0%
Malbec	80	0	0	0	80	0%
Merlot	188	0	0	0	188	0%
Other Red	9	0	0	0	9	0%
Pinot Noir	120	0	0	0	120	0%
Shiraz	1,181	0	0	8	1,189	1%
Total red varieties	2,434	48	41	8	2,531	0%
White winegrapes						
Chardonnay	956	0	0	0	956	0%
Other White	10	0	0	0	10	0%
Pinot Gris	152	0	0	0	152	0%
Riesling	151	0	0	0	151	0%
Sauvignon Blanc	89	0	0	0	89	0%
Semillon	17	0	0	0	17	0%
Traminer (Gewurztraminer)	34	0	0	0	34	0%
Verdelho	20	0	0	0	20	0%
Viognier	19	0	0	0	19	0%
Total white varieties	1,448	0	0	0	1,448	0%
Total all varieties	3,882	48	41	8	3,980	0%



Winegrape Crush Survey Regional Summary Report – 2016

Riverland Wine Region

RIVERLAND

Vintage Overview

Vintage report

Riverland wineries reported outstanding quality for reds and very satisfactory whites despite the compressed vintage. By all accounts and despite the challenging heat conditions the wine produced has been rated as excellent. Intakes recorded by wineries foreshadowed a similar sized harvest to 2015 despite the climatic influences and water pressures.

There were some difficulties with scheduling, as a result of the climatic conditions. Most wineries exercised discretion around minimum baumés; scheduling deliveries a little earlier than normal to counteract the challenge of accelerated ripening at receival points.

Anecdotally there seemed to be a significant increase in the volume of winegrapes coming into the region, particularly from Murray Valley, Coonawarra and Limestone Coast. Again, the volume of tonnes being sold outside the region increased; this is a good sign for many that there is a growing demand for Riverland grapes from regions including McLaren Vale, the Barossa Valley, Langhorne Creek, Clare and beyond. Substantial parcels were transported to southern Victoria and even to Queensland.

Chris Byrne - Riverland Wine

Overview of vintage statistics

The harvest from the Riverland in 2016 was 456,988 tonnes, very similar to the 2015 crush of 454,184 tonnes. This was the highest crush since 2006 and the third highest on record for the region.

The five-year average crush for the Riverland is 431,056 tonnes. The actual crush has increased each year since 2010 and was higher this year than in 2004 when the state total was the highest on record.

The total value of purchased grapes increased by 11% from \$103.2 million to \$114.4 million, while the total estimated value of all grapes increased 10% from \$130.2 million to \$142.6 million, reflecting an increase in the overall average price paid from \$283 per tonne to \$310 per tonne.

The average prices for most major varieties increased. Chardonnay increased from \$236 to \$294, Sauvignon Blanc from \$330 to \$348 and Pinot Gris from \$463 to \$480, consolidating a big jump in 2015. In the reds, Shiraz increased from \$314 to \$336 and Cabernet Sauvignon increased from \$331 to \$347. The average price of Merlot and Riesling fell slightly.

The price dispersion data shows that 95% of red tonnages were purchased at between \$300 and \$600 per tonne and only 4% at below \$300 per tonne, compared with 20% last year. For the whites, 22% were purchased at between \$300 and \$600 compared with 14% in 2015.

There were 128 hectares of new plantings in the 2014-15 season, compared with 105 hectares the previous year – nearly half being Shiraz. The total vineyard area increased by 8 hectares to 20,608 hectares. There are estimated to be over 200 ha of non-bearing vines due to come into production over the next two vintages.

RIVERLAND

Winegrape intake summary – vintage 2016

Red varieties

Variety	Tonnes purchased	E ¹ (less than \$300) ¹	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Sauvignon	49,487	0%	99%	0%	0%	0%	\$17,153,677	\$347	14,729	64,216	\$22,259,096
Durif	243	8%	92%	0%	0%	0%	\$96,679	\$398	6	248	\$98,882
Grenache	3,568	78%	22%	0%	0%	0%	\$1,004,691	\$282	822	4,390	\$1,236,107
Lagrein	44	14%	65%	21%	0%	0%	\$22,678	\$511	-	44	\$22,678
Malbec	196	100%	0%	0%	0%	0%	\$52,942	\$270	107	303	\$81,869
Mataro	1,881	66%	34%	0%	0%	0%	\$590,717	\$314	240	2,121	\$666,136
Merlot	18,744	1%	99%	0%	0%	0%	\$6,719,814	\$358	6,693	25,437	\$9,119,172
Muscat a Petit Grains Rouge/Rose	172	0%	100%	0%	0%	0%	\$69,422	\$404	-	172	\$69,422
Petit Verdot	7,382	15%	84%	0%	0%	0%	\$2,505,578	\$339	4,450	11,832	\$4,016,000
Pinot Noir	7,113	18%	82%	0%	0%	0%	\$2,569,697	\$361	1,135	8,249	\$2,979,741
Ruby Cabernet	1,498	18%	82%	0%	0%	0%	\$552,398	\$369	1,641	3,140	\$1,157,432
Sangiovese	44	100%	0%	0%	0%	0%	\$8,800	\$200	319	363	\$72,626
Shiraz	88,791	0%	99%	1%	0%	0%	\$29,842,637	\$336	23,051	111,842	\$37,589,994
Tempranillo	445	14%	86%	0%	0%	0%	\$154,851	\$348	216	660	\$229,915
Other red	493	60%	14%	26%	0%	0%	\$193,200	\$392	412	905	\$354,649
Red Total	180,102	4%	95%	0%	0%	0%	\$61,537,779	\$342	53,820	233,923	\$79,953,719

¹ Percentages reflect pricing grade's share of purchases for each variety

² It is estimated that the non-response rate (NRR) nationally is 10%; however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

RIVERLAND

Winegrape intake summary – vintage 2016

White varieties

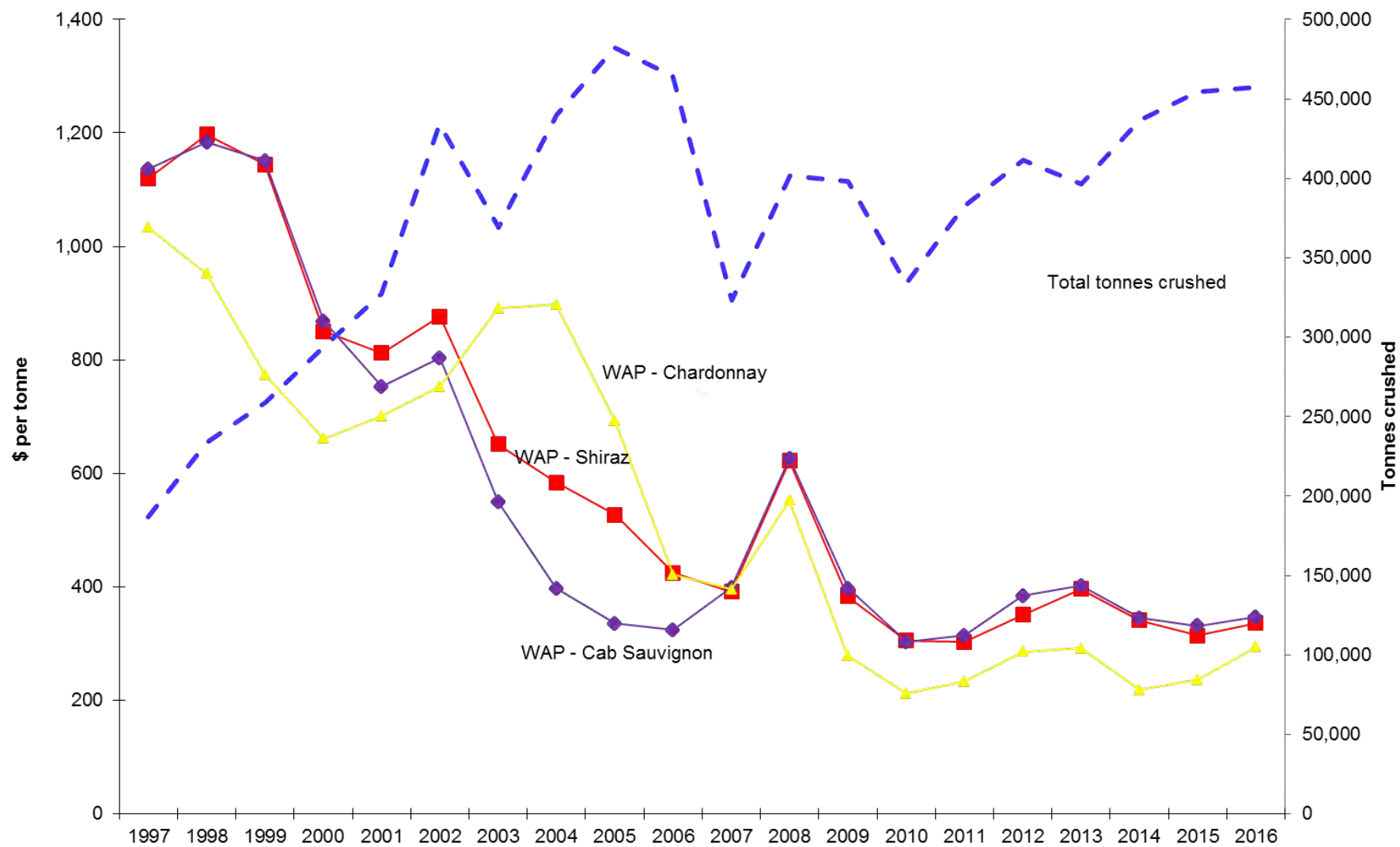
Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Chardonnay	106,159	84%	16%	0%	0%	0%	\$31,236,661	\$294	14,207	120,366	\$35,417,027
Chenin Blanc	1,915	100%	0%	0%	0%	0%	\$392,229	\$205	-	1,915	\$392,229
Colombard	23,824	100%	0%	0%	0%	0%	\$4,845,484	\$203	2,559	26,384	\$5,366,034
Doradillo	79	100%	0%	0%	0%	0%	\$16,908	\$215	949	1,028	\$220,915
Muscadelle	-	na	na	na	na	na	\$0		22	22	\$6,107
Muscat a Petit Grains Blanc	3,989	9%	91%	0%	0%	0%	\$1,194,017	\$299	916	4,905	\$1,468,299
Muscat Gordo Blanco	23,192	96%	4%	0%	0%	0%	\$4,910,765	\$212	3,689	26,882	\$5,691,990
Pinot Gris and Pinot Grigio	1,735	0%	100%	0%	0%	0%	\$833,341	\$480	467	2,202	\$1,057,481
Riesling	2,384	10%	90%	0%	0%	0%	\$775,140	\$325	750	3,134	\$1,018,987
Sauvignon Blanc	13,072	1%	98%	0%	0%	0%	\$4,551,354	\$348	4,182	17,254	\$6,007,554
Semillon	4,826	89%	10%	0%	0%	0%	\$1,216,312	\$252	5,081	9,907	\$2,497,002
Sultana	244	100%	0%	0%	0%	0%	\$52,546	\$215	-	244	\$52,546
Traminer	2,344	29%	54%	18%	0%	0%	\$1,075,261	\$459	569	2,913	\$1,336,334
Verdelho	2,381	52%	39%	9%	0%	0%	\$907,755	\$381	60	2,440	\$930,585
Viognier	1,242	44%	41%	16%	0%	0%	\$477,253	\$384	425	1,667	\$640,549
Other white	1,260	44%	56%	1%	0%	0%	\$408,959	\$325	544	1,804	\$585,633
White Total	188,645	77%	22%	0%	0%	0%	\$52,893,985	\$280	34,421	223,066	\$62,689,274
Grand Total	368,747	42%	58%	0%	0%	0%	\$114,431,764	\$310	88,241	456,988	\$142,642,992

¹ Percentages reflect pricing grade's share of purchases for each variety

² It is estimated that the non-response rate (NRR) nationally is 10%; however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

RIVERLAND

Historical Weighted Average Price vs tonnes crushed



RIVERLAND

Current plantings by variety and year planted

White varieties

Source: Vinehealth Australia

Variety	Current area in hectares				% planted in	
	Pre-2013	2013	2014	2015	Total area	2015
White winegrapes						
Biancone (White Grenache)	7	0	0	0	7	0%
Chardonnay	4,571	2	2	0	4,575	0%
Chenin Blanc	89	0	0	0	89	0%
Colombard	793	0	0	0	793	0%
Doradillo	71	0	0	0	71	0%
Muscadelle (Tokay)	12	0	0	0	12	0%
Muscat A Petit Grains Blanc (White Frontignac)	140	4	0	0	144	0%
Muscat Gordo Blanco	1,012	8	4	3	1,026	0%
Other White	54	1	1	3	58	5%
Palomino	7	0	0	0	8	0%
Pinot Gris	74	0	7	4	85	5%
Riesling	188	0	4	0	191	0%
Sauvignon Blanc	517	0	0	0	517	0%
Semillon	352	0	0	0	352	0%
Sultana	149	0	0	0	150	0%
Traminer (Gewurztraminer)	113	0	0	0	113	0%
Trebbiano	15	0	0	0	15	0%
Verdelho	103	0	0	0	103	0%
Vermentino	17	2	2	0	21	0%
Viognier	124	0	0	0	124	0%
Total white varieties	8,408	18	19	10	8,456	0%

RIVERLAND

Current plantings by variety and year planted

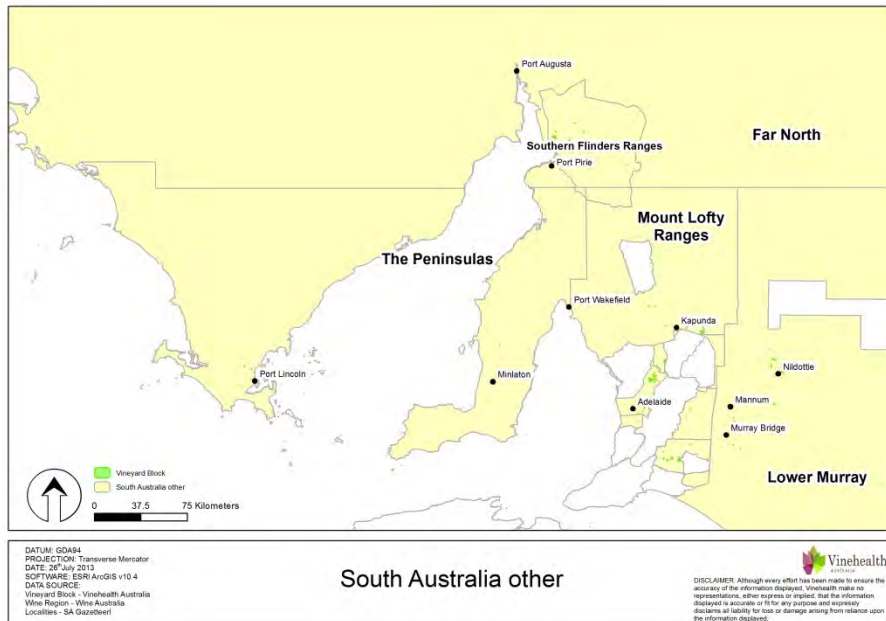
Red and other varieties

Source: Vinehealth Australia

Variety	Current area in hectares				Total area	% planted in
	Pre-2013	2013	2014	2015		
Red winegrapes						
Cabernet Sauvignon	3,172	42	26	26	3,265	1%
Grenache	345	0	0	0	345	0%
Malbec	23	0	0	0	23	0%
Mataro (Mourvedre)	237	6	0	0	243	0%
Merlot	1,166	20	3	4	1,193	0%
Other Red	63	18	3	6	89	6%
Petit Verdot	500	0	2	0	501	0%
Pinot Noir	302	0	0	0	302	0%
Rubired	24	14	0	0	38	0%
Ruby Cabernet	137	0	0	0	137	0%
Sangiovese	14	0	0	0	14	0%
Shiraz	5,360	42	44	65	5,511	1%
Tarrango	4	0	0	0	4	0%
Tempranillo	46	0	6	0	52	0%
Total red varieties	11,390	143	84	100	11,717	1%
Unknown variety	259	0	0	0	259	0%
Rootstock Block	25	0	0	0	25	0%
Table grapes - red	31	0	1	1	33	2%
Table grapes - white	12	0	0	16	28	58%
Multi-purpose red	62	0	0	0	62	0%
Multi-purpose white	27	0	0	0	27	0%
Total all varieties	20,214	161	105	128	20,608	1%

SA Winegrape Crush Survey Regional Summary Report – 2016

South Australia (Other)



SOUTH AUSTRALIA (OTHER)

South Australia (other) includes the GI region of Southern Flinders Ranges, the Peninsulas zone, and the vineyards in Mount Lofty Ranges (other) and Lower Murray zone (other) – see map on cover page. The total area of vines included in this definition is 1,017 hectares.

Vintage overview

Overview of vintage statistics

The harvest from South Australia (other) in 2016 was 4,709 tonnes, compared with 4,029 tonnes in 2015.

The five-year average crush for this group of regions is 3,852 tonnes, implying that 2016 yields were up on average. The smallest vintage in the past five years was 2,942 tonnes recorded in 2013 while the largest was the 2016 crush.

The total value of fruit from these vineyards is estimated at just under \$3 million. The average purchase values for Cabernet Sauvignon and Chardonnay were higher than in 2015 but the average price for Shiraz dropped significantly.

The price dispersion data shows that 28% of red tonnages were purchased at between \$600 and \$1500 per tonne and 61% at below \$600, compared with 54% and 23% respectively in 2015 – indicating a downward shift in price dispersion. For the whites, all the fruit was sold at below \$600 per tonne, with 57% at less than \$300 per tonne. Last year 11% was sold at \$600 or above.

There were very small net decreases in planted area in two of the regions included in South Australia (other), resulting in a total net decrease of 12 hectares.

SOUTH AUSTRALIA (OTHER)
Winegrape intake summary – vintage 2016

		E	¹	D	C	B	A		Calc avg.			
Variety	Tonnes purchased	(less than \$300)		(\$300- \$600)	(\$600- \$1,500)	(\$1,500- \$2,000)	(above \$2,000)	Total value purchased	purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Sauvignon	546	0%		75%	9%	12%	4%	\$361,175	\$661	216	762	\$503,777
Merlot	249	0%		68%	32%	0%	0%	\$152,108	\$612	29	277	\$169,539
Petit Verdot	-	na		na	na	na	na	\$0		8	8	\$5,433
Sangiovese	-	na		na	na	na	na	\$0		30	30	\$21,731
Shiraz	1,697	0%		54%	34%	10%	1%	\$1,300,460	\$767	552	2,248	\$1,723,245
Other red	24	na		na	na	na	na	\$8,505	\$350	-	24	\$8,505
Red Total	2,516	0%		61%	28%	9%	2%	\$1,822,247	\$724	833	3,349	\$2,432,229
Chardonnay	824	69%		31%	0%	0%	0%	\$233,246	\$283	15	839	\$237,480
Riesling	-	na		na	na	na	na	\$0		33	33	\$9,996
Viognier	-	na		na	na	na	na	\$0		9	9	\$2,880
Other white	463	36%		64%	0%	0%	0%	\$159,042	\$344	16	479	\$164,443
White Total	1,287	57%		43%	0%	0%	0%	\$392,287	\$305	73	1,360	\$414,798
Grand Total	3,803	19%		55%	19%	6%	1%	\$2,214,535	\$582	906	4,709	\$2,847,027

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

SOUTH AUSTRALIA (OTHER)

Current plantings by variety and year planted

Source: Vinehealth Australia

Southern Flinders Ranges

Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
Red winegrapes						
Cabernet Sauvignon	20	0	0	0	20	0%
Merlot	6	0	0	0	6	0%
Other Red	3	0	0	0	3	0%
Shiraz	134	0	0	0	134	0%
Total red varieties	164	0	0	0	164	0%
Total white varieties	1	0	0	0	1	0%
Total all varieties	165	0	0	0	165	0%

The Peninsulas

Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	0%
Other Red	3	0	0	0	3	0%
Shiraz	12	0	0	0	12	0%
Total red varieties	24	0	0	0	24	0%
Total white varieties	9	0	0	0	10	0%
Unknown	37	0	0	0	37	0%
Total all varieties	70	0	0	0	71	0%

SOUTH AUSTRALIA (OTHER)

Current plantings by variety and year planted

Source: Vinehealth Australia

Lower Murray zone - other

Lower Murray zone - other		Current area in hectares				% planted in
Variety	Pre-2013	2013	2014	2015	Total area	2015
Red winegrapes						
Cabernet Sauvignon	73	0	0	0	73	0%
Merlot	18	0	0	0	18	0%
Other Red	20	0	0	0	20	0%
Petit Verdot	16	0	0	0	16	0%
Shiraz	135	0	0	3	138	2%
Total red varieties	261	0	0	3	265	1%
White winegrapes						
Chardonnay	85	0	0	0	85	0%
Colombard	16	0	0	0	16	0%
Other White	27	0	0	0	27	0%
Riesling	12	0	0	0	12	0%
Sauvignon Blanc	12	1	0	0	12	0%
Total white varieties	152	1	0	0	152	0%
Unknown variety	14	0	0	0	14	0%
Total all varieties	427	1	0	3	431	1%

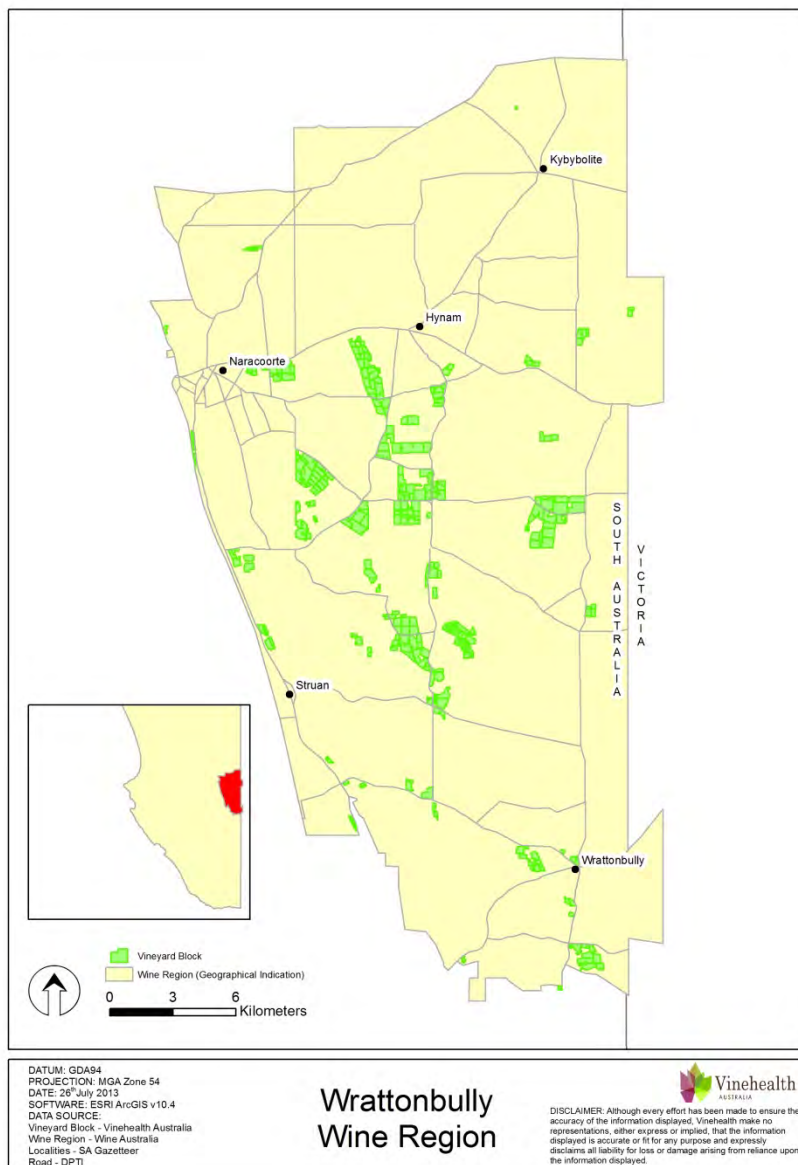
SOUTH AUSTRALIA (OTHER)

Current plantings by variety and year planted

Source: Vinehealth Australia

Mount Lofty Ranges zone - other

Variety	Current area in hectares					% planted in 2015
	Pre-2013	2013	2014	2015	Total area	
Red winegrapes						
Cabernet Sauvignon	71	3	0	0	74	0%
Merlot	9	0	0	0	9	0%
Other Red	21	3	0	0	24	0%
Petit Verdot	6	0	0	0	6	0%
Sangiovese	12	0	0	0	12	0%
Shiraz	185	6	5	0	196	0%
Total red varieties	304	12	5	0	321	0%
White winegrapes						
Chardonnay	4	0	0	0	4	0%
Other White	11	0	0	0	11	0%
Riesling	5	0	0	0	5	0%
Total white varieties	21	0	0	0	21	0%
Germplasm	4	0	0	0	4	0%
Unknown variety	4	0	0	0	4	0%
Total all varieties	332	12	5	0	350	0%



SA Winegrape Crush Survey Regional Summary Report – 2016

Wrattenbully Wine Region

WRATTONBULLY

Vintage overview

Vintage report

The 2016 vintage will be remembered for all the right reasons. For the first time in a long time we can describe a vintage as being good for both quality and tonnage. Quality hasn't been an issue for recent vintages, but tonnage certainly has so it was very rewarding to return to volumes that are more favourable. Although there were larger yields this season, vines were in balance and only minimal thinning was undertaken across the district.

Winter was particularly dry in 2015 with only 112mm of rainfall against the long term average of 180mm. As a result, early irrigation was required to replenish the soil profile. It remained dry throughout spring and summer with only 106mm of rainfall against the long term average of 203mm.

Mean maximum temperatures throughout November were near normal, but October and December were significantly above average – setting new monthly mean records. As a result, flowering for the second year in a row was early and particularly quick. From the beginning of October there were almost weekly heatwaves and this continued up until the last two weeks of January, after which conditions were ideal.

Some sites to the south received significant damage as a result of a frost on December 2nd, which would have been bitterly disappointing at such a late stage. Fortunately most growers either escaped or only had small pockets of damage.

For the second year in a row harvest commenced early in February. Many growers harvested their whites earlier than their previous records, which were in most cases set in 2015. The reds, whilst early in comparison to the whites, progressed at a more sedate pace as a result of the milder conditions. Temperatures were quite consistent through February and March with no extremes. This coupled with very little rain delivered perfect conditions to progress through vintage with minimal interruptions.

Easter continues to be a surprisingly accurate way to predict the end of vintage regardless of when it falls, with the vast majority of the region's fruit harvested by this time.

White wines are showing lovely varietal flavours, backed by crisp natural acidity. The vintage was a standout for reds with incredibly deep red colours. The flavours are rich and intense in balance with supple tannins that support the wines well.

James Freckleton – Chairperson, Wrattonbully Wine Region Association

Overview of vintage statistics

The harvest from Wrattonbully was 23,606 tonnes in 2016 compared with 16,557 tonnes in 2015. The five-year average crush for Wrattonbully is 19,253 tonnes. The 2016 crush was the highest in the five year period and 23% above the five year average. The smallest vintage in the past five years was 16,557 tonnes in 2015.

The total value of grapes increased from \$17 million to \$22.7 million; the average price for Cabernet Sauvignon increased by \$31 to \$1208 per tonne while Shiraz decreased by \$46 to \$975 per tonne.

The price dispersion data shows that 82% of red tonnages were purchased at between \$600 and \$1500 and 10% at above \$1500, while for the whites, 72% was purchased between \$600 and \$1500 and 28% between \$300 and \$600. This represents a downward shift in price dispersion for red and white varieties.

There was a small reduction in the net area of vineyards in the region, although there were 6 hectares of Cabernet Sauvignon planted in the 2015-16 season.

WRATTONBULLY
Winegrape intake summary – vintage 2016

Variety	Tonnes purchased	E ¹ (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch.	Winery grown fruit	Total crushed ²	Est total value ALL grapes
								value per tonne			
Cabernet Sauvignon	3,995	0%	4%	85%	6%	6%	\$4,824,270	\$1,208	4,152	8,147	\$9,838,063
Malbec	51	0%	0%	100%	0%	0%	\$52,627	\$1,038	-	51	\$52,627
Merlot	1,001	0%	38%	47%	15%	0%	\$761,537	\$761	1,668	2,669	\$2,030,095
Pinot Noir	212	0%	17%	83%	0%	0%	\$161,333	\$761	944	1,156	\$879,964
Sangiovese	-	na	na	na	na	na	\$0		63	63	\$66,785
Shiraz	3,133	0%	2%	90%	6%	2%	\$3,055,562	\$975	2,577	5,710	\$5,568,709
Tempranillo	52	0%	0%	100%	0%	0%	\$68,120	\$1,300	-	52	\$68,120
Other red	17	na	na	na	na	na	\$17,591	\$1,054	26	42	\$44,635
Red Total	8,461	0%	8%	82%	7%	3%	\$8,941,039	\$1,057	9,430	17,891	\$18,548,999
Chardonnay	1,509	0%	38%	62%	0%	0%	\$937,013	\$621	1,131	2,640	\$1,639,017
Pinot Gris and Pinot Grigio	468	0%	0%	100%	0%	0%	\$463,403	\$989	1,469	1,937	\$1,916,350
Sauvignon blanc	341	0%	0%	100%	0%	0%	\$174,006	\$510	474	815	\$415,957
Semillon	-	na	na	na	na	na	\$0		64	64	\$42,889
Other white	131	0%	84%	16%	0%	0%	\$68,870	\$524	128	260	\$136,246
White Total	2,450	0%	28%	72%	0%	0%	\$1,643,293	\$671	3,266	5,716	\$4,150,459
Grand Total	10,911	0%	12%	80%	5%	3%	\$10,584,331	\$970	12,695	23,606	\$22,699,457

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

WRATTONBULLY
Current plantings by variety and year planted

Source: Vinehealth Australia

Variety	Current area in hectares				Total area	% planted in
	Pre-2013	2013	2014	2015		2015
Red winegrapes						
Cabernet Sauvignon	1,202	5	0	6	1,213	0%
Malbec	5	0	2	0	7	0%
Merlot	285	0	0	0	285	0%
Other Red	9	0	0	0	9	0%
Petit Verdot	4	0	0	0	4	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	679	0	10	0	689	0%
Tempranillo	9	0	0	0	9	0%
Total red varieties	2,256	5	12	6	2,279	0%
White winegrapes						
Chardonnay	198	0	0	0	198	0%
Marsanne	2	0	0	0	2	0%
Pinot Gris	97	0	0	0	97	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	57	1	0	0	58	0%
Semillon	5	0	0	0	5	0%
Viognier	6	0	0	0	6	0%
Total white varieties	372	1	0	0	373	0%
Unknown variety	22	0	0	0	22	0%
Total all varieties	2,649	6	12	6	2,673	0%