

Prepared by:

Wine Australia

On behalf of:



2017 SA Winegrape Crush Survey



July 2017

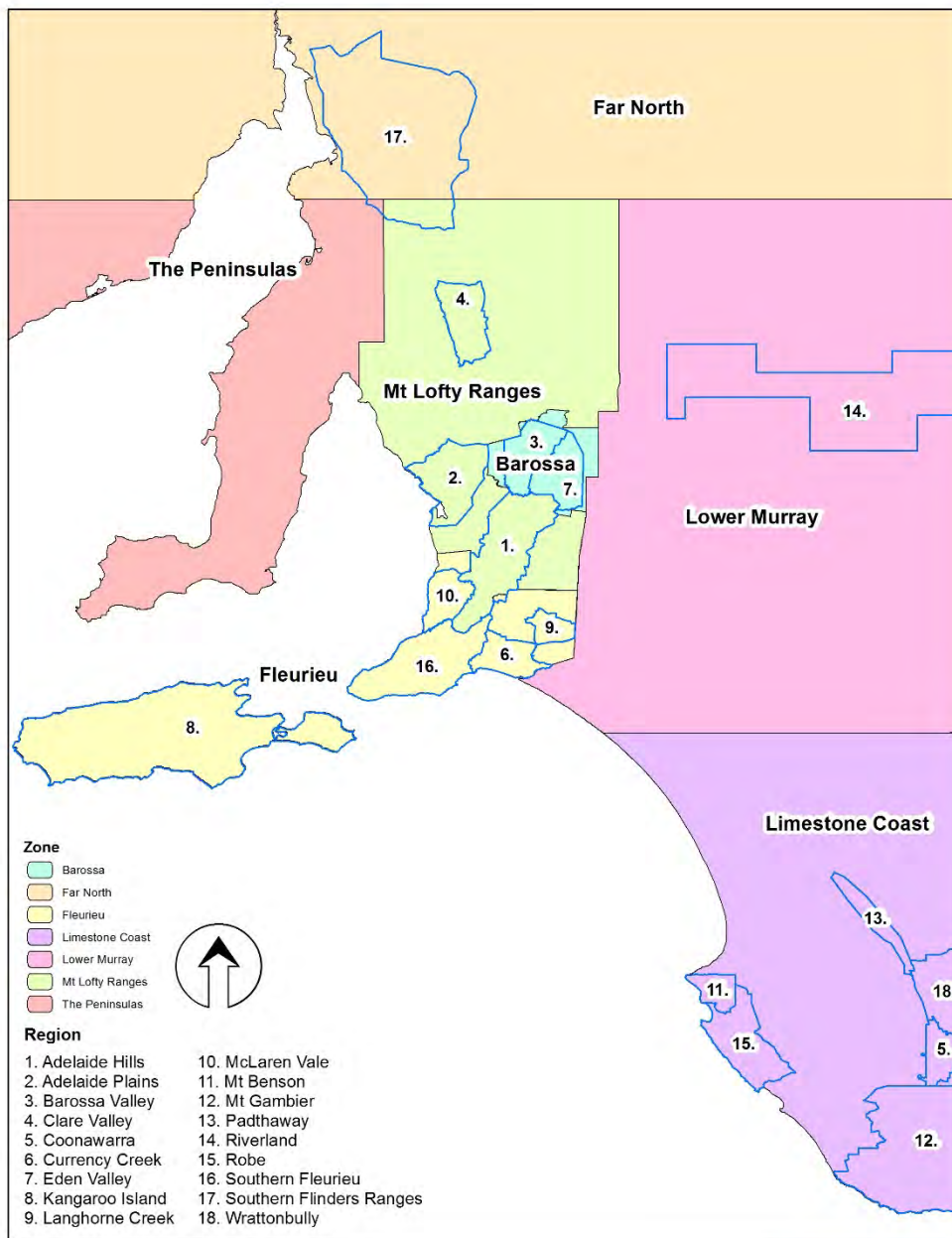
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2017 SA Winegrape Crush Survey

State Summary Report

Wine Australia July 2017



Geographical Indication Zones and Regions in South Australia



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SCALE: 1:2,500,000
DATUM: GDA94
PROJECTION: Transverse Mercator
DATE: 16th August 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Wine Regions - Wine Australia

State summary

Overview of vintage statistics

State and regional overview

The total reported crush of South Australian winegrapes in 2017 was 863,789 tonnes. This was an increase of 6% above the 2016 reported crush of 817,981 tonnes. Nationally, there was an estimated non-response rate of 12%; however a specific non-response rate for South Australia is not known.

The top three regions by volume in 2017 were the Riverland with 55% of the crush (470,123 tonnes), Barossa Valley with 8% (73,174 tonnes) and Langhorne Creek with 7% (59,141 tonnes). Many regions had reported increases in tonnes crushed, including Riverland (up 3%), Barossa Valley (up 30%), McLaren Vale (up 8%), Coonawarra (up 3%), Clare Valley (up 33%), Wrattonbully (up 16%) and Eden Valley (up 20%).

Regions that reported a drop in the tonnes crushed included Langhorne Creek (down 2%), Padthaway (down 8%), Adelaide Hills (down 1%) and Currency Creek (down 9%).

The total estimated value of the crush was \$658 million in 2017 compared with \$581 million in 2016. The average purchase value per tonne across the state increased by 8% from \$631 in 2016 to \$680 per tonne in 2017.

Looking at the top variety in each region, weighted average prices increased for Barossa Shiraz, Clare Riesling and Riverland Chardonnay, while McLaren Vale Shiraz, Coonawarra Cabernet Sauvignon, Langhorne Creek Cabernet Sauvignon and Adelaide Hills Sauvignon Blanc all decreased.

Varietal overview

The red crush was 549,233 tonnes, which was 11% higher than the 2016 crush (496,566 tonnes) and 19% above the five year average (462,262 tonnes); whilst the white crush production decreased by 2% to 314,556 tonnes, which is 5% above the five year average (298,719 tonnes).

There were increased tonnes crushed for the major red varieties with Shiraz up 13% to 274,764 tonnes, Cabernet Sauvignon up 5% to 158,043 tonnes and Merlot up 8% to 49,460 tonnes. Other reds with increased tonnes crushed included Grenache, Mataro/Mourvedre and Tempranillo.

Among the white varieties, Chardonnay declined 9% to 151,844 tonnes while tonnes increased for Sauvignon Blanc (up 12% to 38,886 tonnes), Muscat Gordo Blanco (up 10% to 29,698 tonnes) and Colombard (up 8% to 29,045 tonnes). Other whites to increase included Riesling, Semillon, Muscat a Petit Grains Blanc and Fiano.

Vineyard plantings

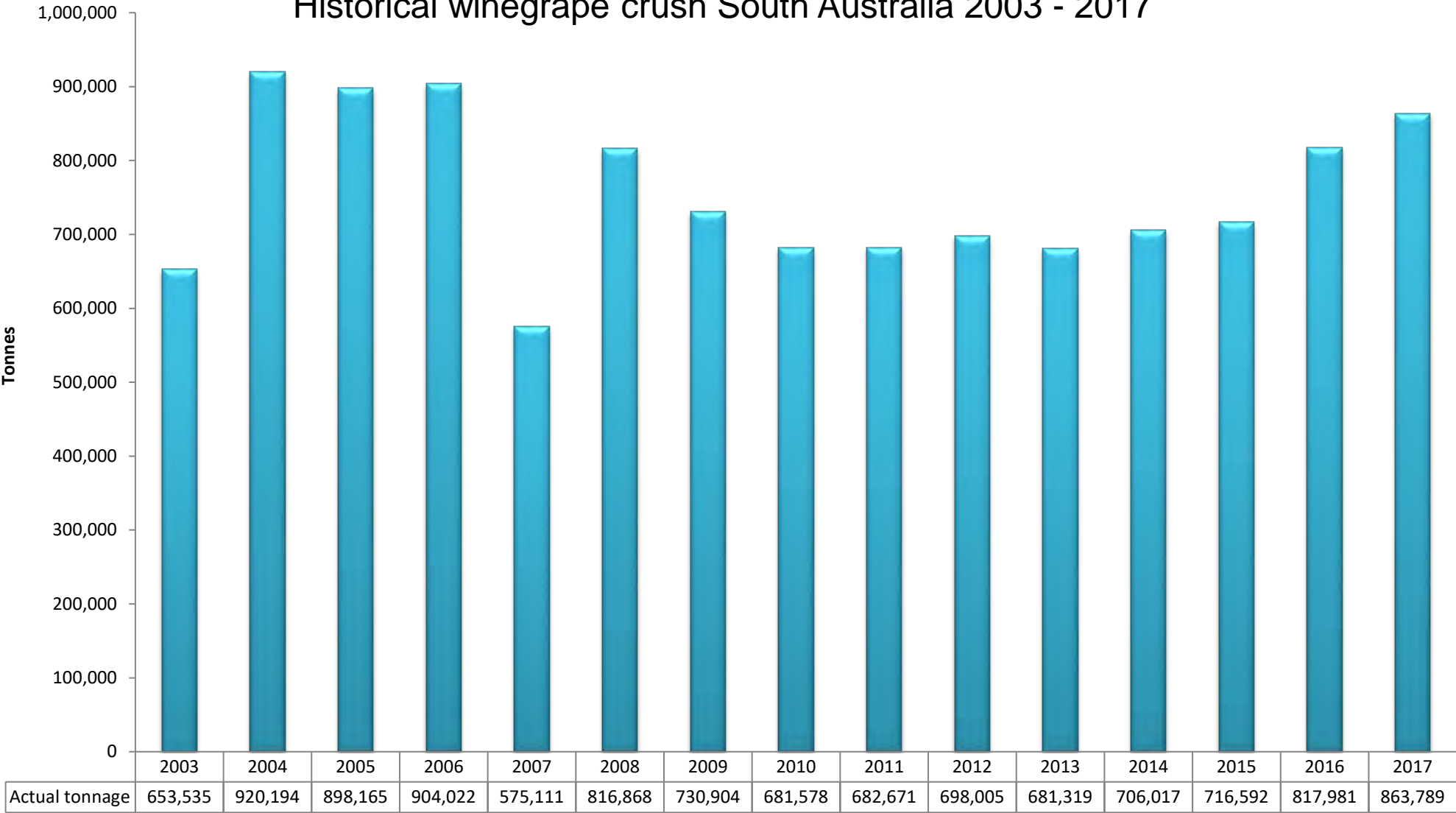
Planting data derived from the Vinehealth Australia vineyard register shows that there were 75,624 hectares planted to vines in South Australia as at 30 April 2017. This represents a decrease of 234 hectares since 2016. Although there have been net decreases in the previous five years in total planted area, the current area planted is 6,000 hectares higher than it was in 2004.

There was a total of 451 hectares (<1% of the total area) planted in spring 2016 (including top-working and replacements) compared with 464 hectares planted in the 2015-16 season. Nearly half the new plantings were Shiraz (202 ha), with Pinot Gris (51 ha), Cabernet Sauvignon (49 ha) and Riesling (48 ha) the next most planted varieties.

There was a total of 3,360 growers registered with the Board as at 30 April 2017. This was slightly fewer than at the same time last year. 1,994 growers (59%) have properties smaller than 10 hectares and account for 11% of the total vineyard area, while 127 growers (4%) have properties larger than 100 hectares (in the same region) and account for 40% of the vineyard area.

State summary

Historical winegrape crush South Australia 2003 - 2017

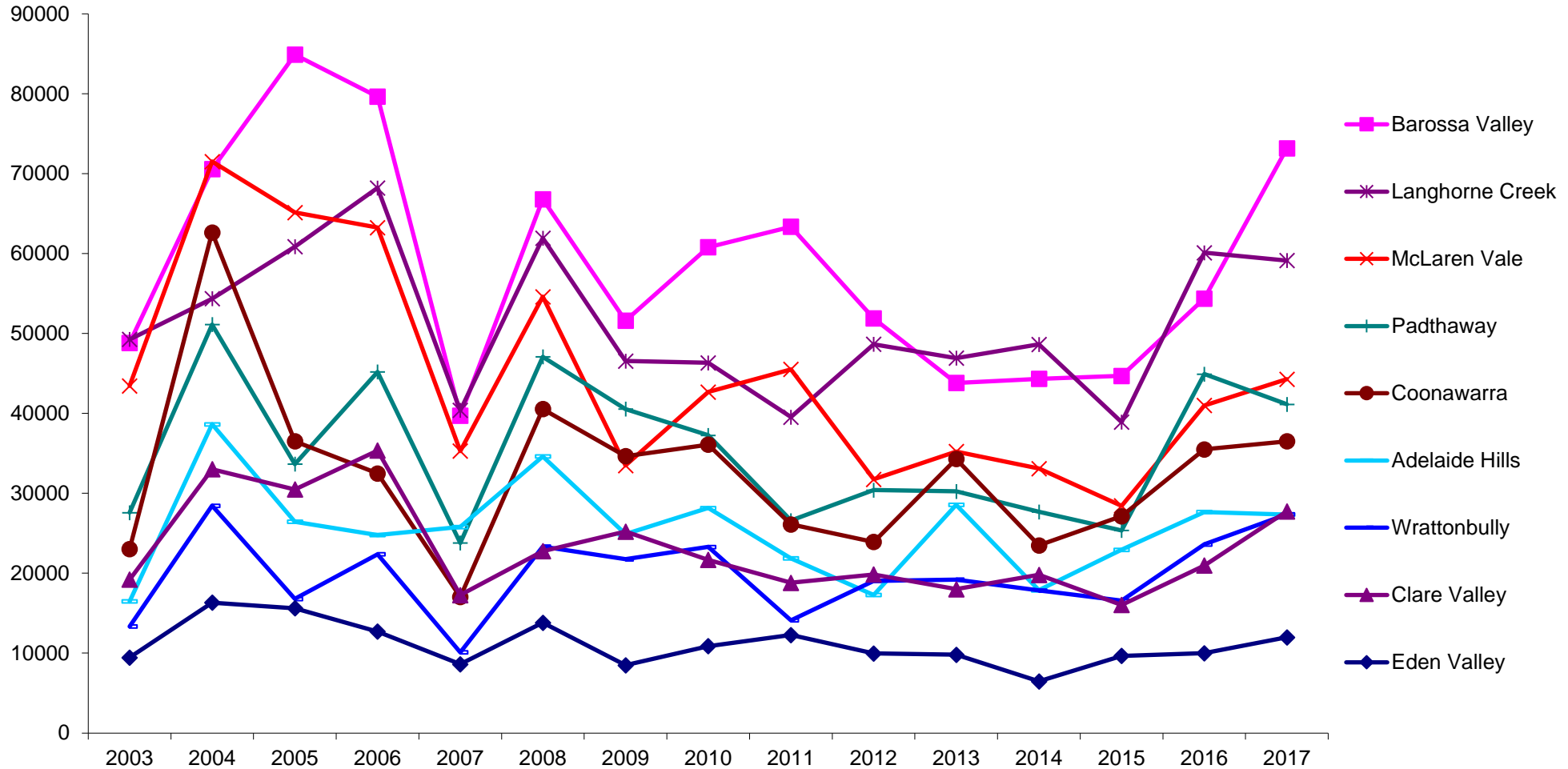


State summary

Vintage by region 2003 - 2017

Tonnes crushed

Not including the Riverland due to scale differences



State summary

Total crush by GI region 2017 vs 2016

GI Region	Winery		Total crush 2017	Region		% change
	grown (tonnes)	Purchased (tonnes)		share of state	Total crush 2016	
Adelaide Hills	7,628	19,687	27,335	3.2%	27,670	-1%
Adelaide Plains	80	3,416	3,496	0.4%	3,143	11%
Barossa Valley	27,715	42,443	70,166	8.1%	53,888	30%
Barossa zone other	2,623	385	3,008	0.3%	483	523%
Clare Valley	13,183	14,510	27,752	3.2%	20,795	33%
Coonawarra	26,503	10,005	36,509	4.2%	35,497	3%
Currency Creek	6,246	2,592	9,211	1.1%	10,169	-9%
Eden Valley	5,995	5,980	11,975	1.4%	9,991	20%
Far North zone other				0.0%	32	-100%
Fleurieu zone other	638	1,929	2,567	0.3%	2,549	1%
Kangaroo Island	59	40	99	0.0%	162	-39%
Langhorne Creek	27,572	31,569	59,141	6.8%	60,119	-2%
Limestone Coast zone other	11,988	5,717	17,706	2.0%	14,788	20%
Lower Murray zone other		3,720	3,720	0.4%	3,227	15%
McLaren Vale	18,359	25,928	44,287	5.1%	40,997	8%
Mount Benson	848	1,011	1,858	0.2%	2,326	-20%
Mount Gambier	6	763	769	0.1%	945	-19%
Mount Lofty Ranges zone other	132	1,912	2,044	0.2%	1,451	41%
Padthaway	12,356	28,785	41,142	4.8%	44,922	-8%
Riverland	101,968	368,155	470,123	54.4%	456,494	3%
Robe	1,786	35	1,821	0.2%	2,609	-30%
South Australia unspecified				0.0%	487	-100%
Southern Fleurieu	37	437	474	0.1%	371	28%
Southern Flinders Ranges	454	543	997	0.1%	924	8%
The Peninsulas	48	166	214	0.0%	337	-36%
Wrattenbully	17,669	9,704	27,374	3.2%	23,606	16%
Total all regions	283,893	579,434	863,789	100%	817,981	6%

Small discrepancies between the total crush and the sum of winery grown plus purchases are a result of purchased fruit where no pricing data has been provided. These are omitted from the purchased column but are included in the total and in the estimated value of all grapes.

State summary

Vintage summary by GI region 2017

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush	Est value of purchased grapes	Est value of all grapes
Adelaide Hills	Red	1,915	6,446	8,382	\$9,751,254	\$12,997,237
	White	5,713	13,241	18,953	\$17,139,876	\$24,498,942
	Total	7,628	19,687	27,335	\$26,891,130	\$37,496,179
Adelaide Plains	Red	26	2,642	2,669	\$2,308,925	\$2,332,954
	White	54	774	827	\$650,095	\$695,067
	Total	80	3,416	3,496	\$2,959,020	\$3,028,021
Barossa Valley inc Barossa Zone other	Red	28,513	37,230	65,744	\$79,268,428	\$141,251,111
	White	1,825	5,598	7,429	\$4,216,645	\$5,867,649
	Total	30,337	42,828	73,174	\$83,485,073	\$147,118,760
Clare Valley	Red	8,836	9,011	17,860	\$11,470,356	\$22,575,604
	White	4,346	5,500	9,892	\$5,333,672	\$9,711,883
	Total	13,183	14,510	27,752	\$16,804,027	\$32,287,487
Coonawarra	Red	23,395	9,138	32,533	\$10,697,175	\$38,222,652
	White	3,108	867	3,975	\$621,289	\$2,872,800
	Total	26,503	10,005	36,509	\$11,318,463	\$41,095,452
Currency Creek	Red	4,197	2,152	6,722	\$1,765,205	\$5,444,637
	White	2,049	440	2,489	\$304,141	\$1,561,462
	Total	6,246	2,592	9,211	\$2,069,346	\$7,006,099
Eden Valley	Red	2,868	3,057	5,925	\$6,597,643	\$12,840,467
	White	3,126	2,924	6,050	\$3,961,410	\$8,387,462
	Total	5,995	5,980	11,975	\$10,559,053	\$21,227,929
Fleurieu zone - other inc Southern Fleurieu and Kangaroo Island	Red	245	1,407	1,652	\$1,348,944	\$1,626,423
	White	490	999	1,489	\$735,197	\$1,123,669
	Total	735	2,406	3,141	\$2,084,141	\$2,750,092

State summary

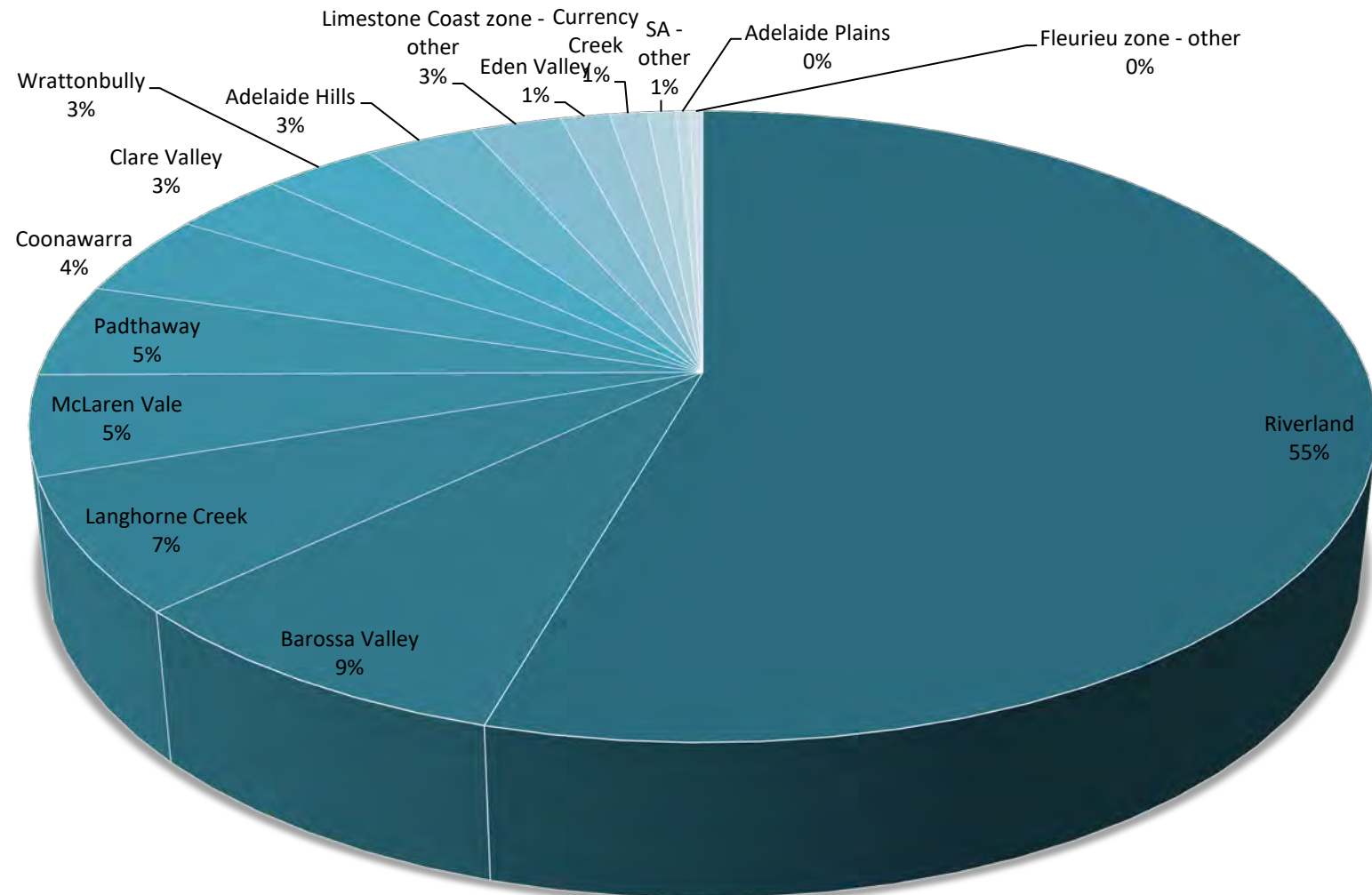
Vintage summary by GI region 2017

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush	Est value of purchased grapes	Est value of all grapes
Langhorne Creek	Red	23,436	26,974	50,410	\$21,773,647	\$40,651,569
	White	4,136	4,595	8,732	\$2,807,480	\$5,312,995
	Total	27,572	31,569	59,141	\$24,581,127	\$45,964,564
Limestone Coast zone - other inc Robe, Mt Benson and Mt Gambier	Red	12,790	5,943	18,733	\$4,768,857	\$14,214,304
	White	1,838	1,583	3,422	\$1,247,074	\$2,699,057
	Total	14,628	7,526	22,154	\$6,015,931	\$16,913,361
McLaren Vale	Red	17,190	23,987	41,177	\$39,685,799	\$68,060,535
	White	1,168	1,941	3,110	\$1,690,172	\$2,777,424
	Total	18,359	25,928	44,287	\$41,375,972	\$70,837,959
Padthaway	Red	7,489	16,281	23,770	\$16,197,936	\$23,674,327
	White	4,868	12,504	17,372	\$8,610,517	\$12,140,383
	Total	12,356	28,785	41,142	\$24,808,453	\$35,814,710
Riverland	Red	58,841	187,591	246,431	\$73,209,538	\$96,127,832
	White	43,127	180,564	223,691	\$53,162,015	\$66,258,531
	Total	101,968	368,155	470,123	\$126,371,553	\$162,386,363
Wrattonbully	Red	14,177	7,688	21,865	\$8,715,049	\$24,570,991
	White	3,492	2,017	5,509	\$1,390,542	\$3,954,767
	Total	17,669	9,704	27,374	\$10,105,591	\$28,525,758
SA - other	Red	619	4,740	5,360	\$4,155,310	\$4,881,975
	White	15	1,601	1,616	\$508,955	\$522,745
	Total	634	6,341	6,975	\$4,664,265	\$5,404,720
All winegrapes	Total	283,893	579,434	863,789	\$394,093,146	\$657,857,454

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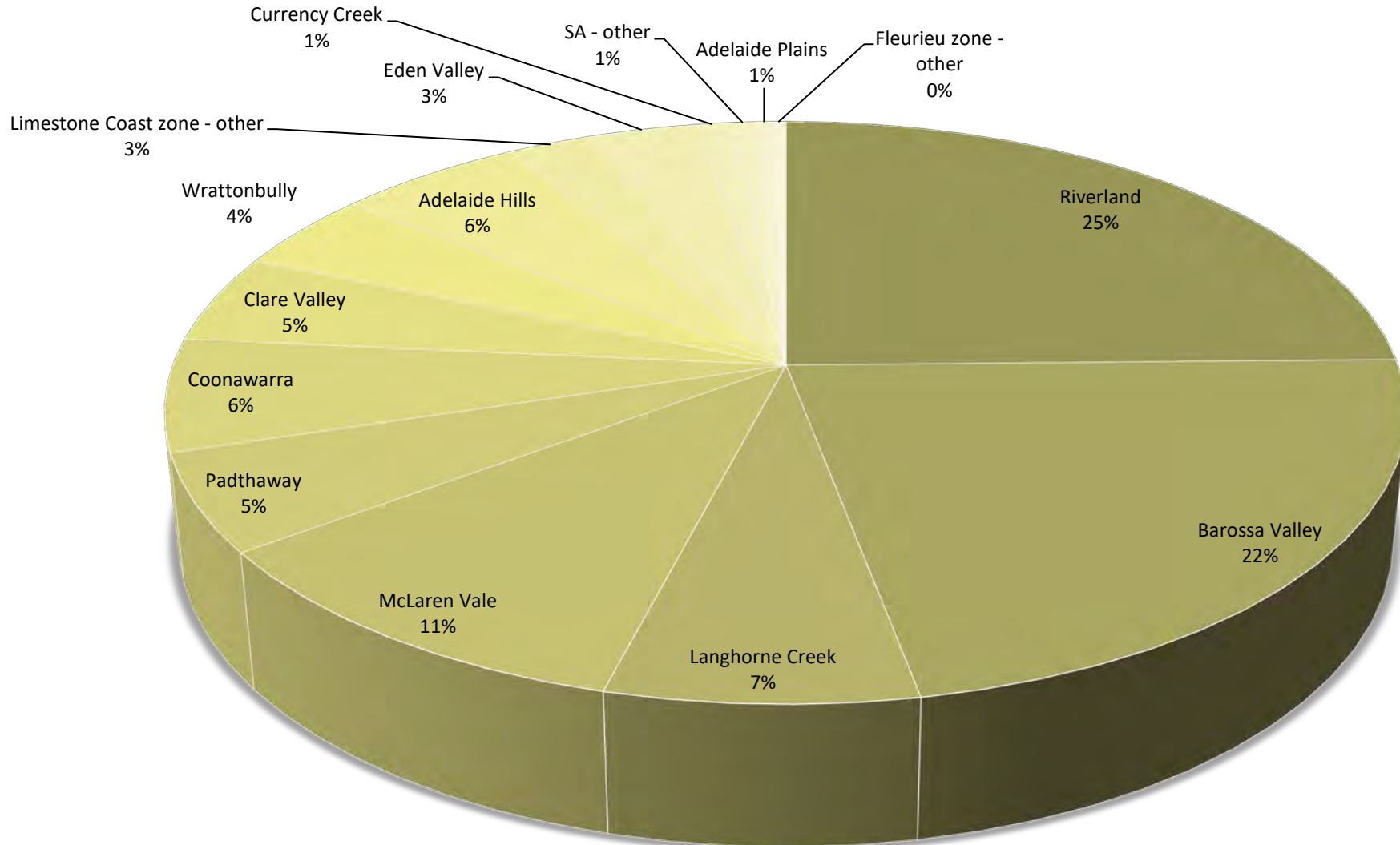
State summary

Crush by region volume share 2017



State summary

Crush by region value share 2017

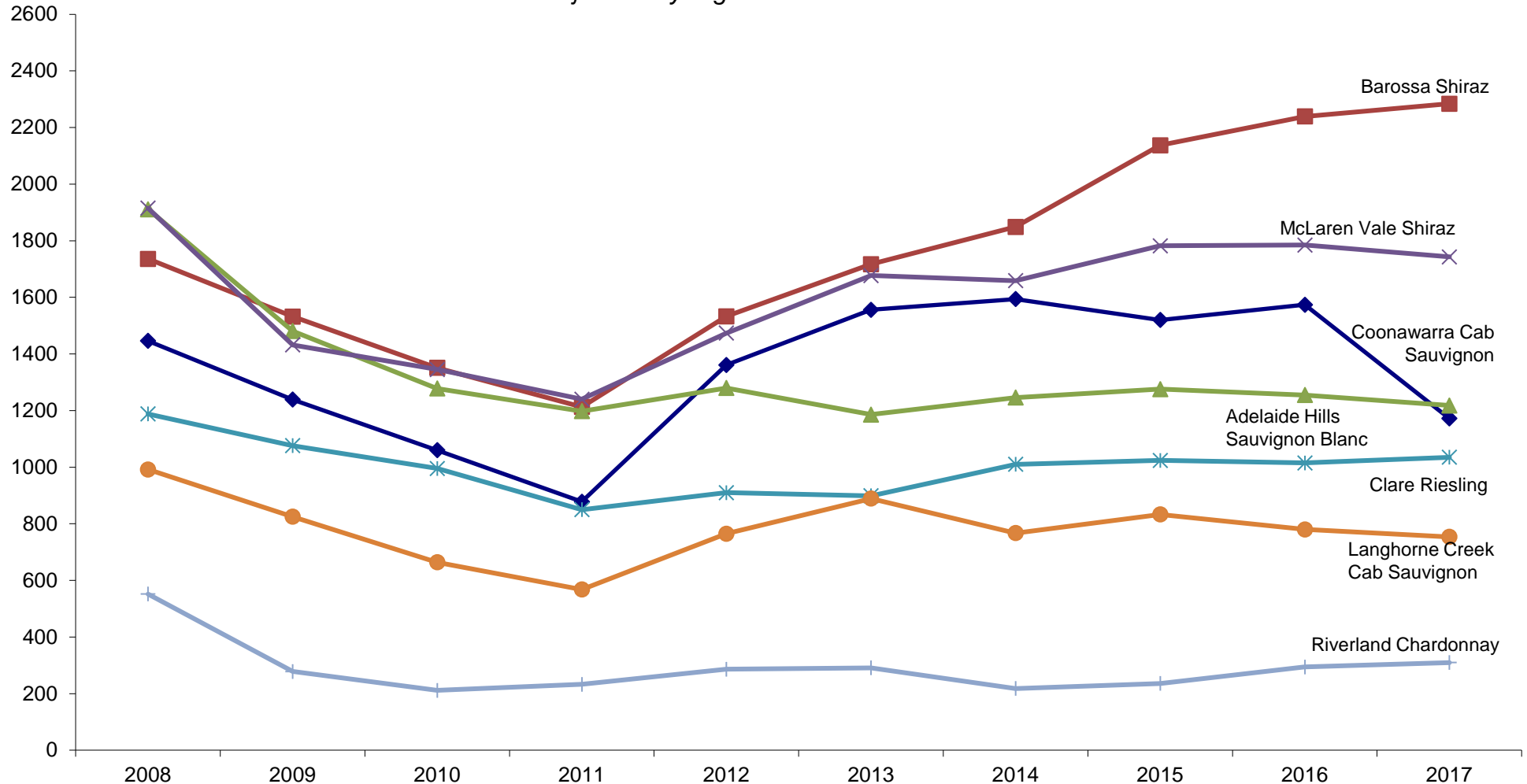


State summary

Historical weighted average prices – 2008 - 2017

Average price (\$ per tonne)

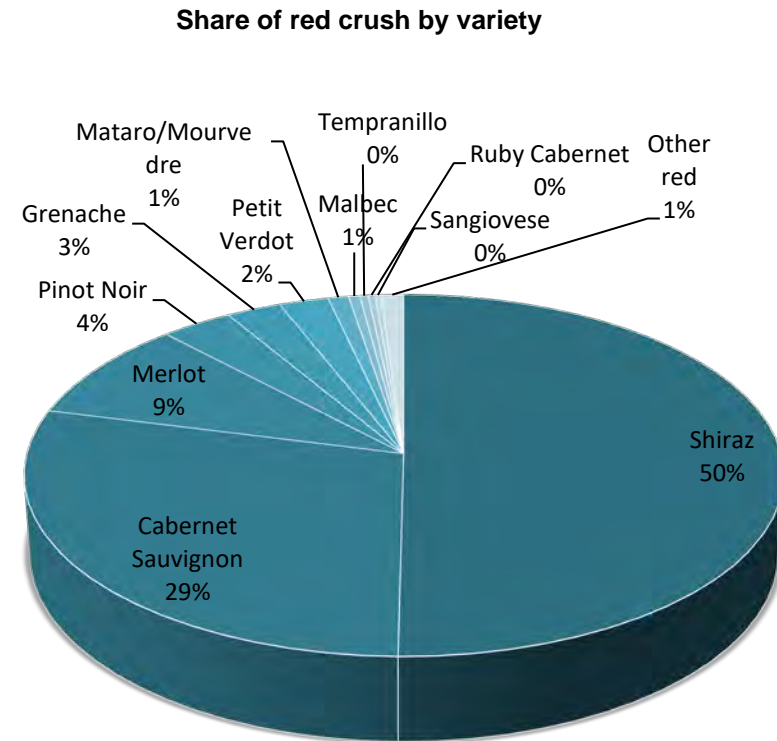
Major variety-region combinations



State summary

Vintage summary by variety 2017 – red winegrapes

Variety	Winery grown (tonnes)	Purchased (tonnes)	Total crushed	Purchased fruit as % of total
Red				
Barbera	23	52	75	69%
Cabernet Franc	498	329	827	40%
Cabernet Sauvignon	63,032	94,931	158,043	60%
Dolcetto	8	13	21	62%
Durif	427	414	840	49%
Grenache	4,775	9,631	14,407	67%
Lagrein	11	56	67	84%
Malbec	1,434	1,520	2,955	51%
Mataro/Mourvedre	1,355	4,039	5,393	75%
Merlot	20,044	29,403	49,460	59%
Montepulciano	129	169	298	57%
Muscat a Petit Grains Rouge/Rose	3	158	161	98%
Nero d'Avola	46	59	105	56%
Petit Verdot	5,604	7,329	12,933	57%
Pinot Meunier	32	208	240	87%
Pinot Noir	3,751	15,072	18,844	80%
Roussanne	94	80	174	46%
Ruby Cabernet	793	1,007	1,801	56%
Sangiovese	739	751	1,490	50%
Shiraz	99,686	175,790	275,764	64%
Tarrango		247	247	100%
Tempranillo	695	1,453	2,154	67%
Other red	1,358	1,576	2,934	54%
Red total	204,537	344,287	549,233	63%

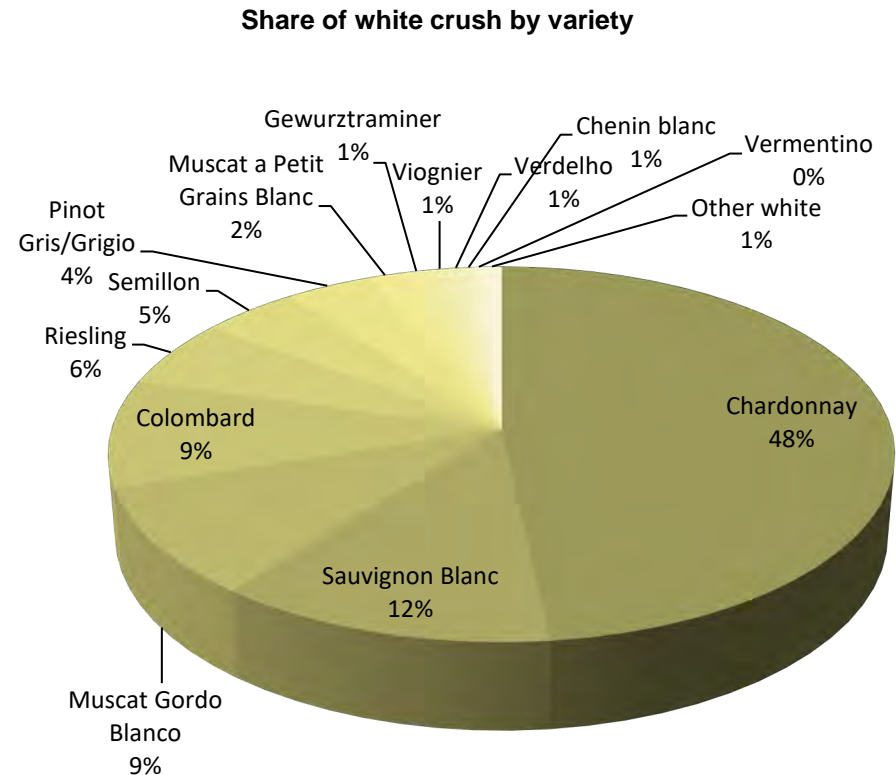


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State summary

Vintage summary by variety 2017 – white winegrapes

Variety	Winery grown (tonnes)	Purchased (tonnes)	Total crushed	Purchased fruit as % of total
White				
Canada Muscat	55	35	90	39%
Chardonnay	30,834	121,010	151,844	80%
Chenin blanc	21	1,787	1,808	99%
Colombard	4,070	24,975	29,045	86%
Doradillo	95	38	133	29%
Fiano	86	248	334	74%
Gewurztraminer	2,362	1,663	4,026	41%
Marsanne	96	21	117	18%
Moscato Giallo	11	67	78	86%
Muscadelle (Tokay)	46	21	67	31%
Muscat a Petit Grains Blanc	942	4,460	5,401	83%
Muscat Gordo Blanco	4,605	25,093	29,698	84%
Pinot Gris/Grigio	4,762	7,677	12,439	62%
Prosecco	51	125	176	71%
Riesling	9,646	8,820	18,515	48%
Sauvignon Blanc	12,830	26,053	38,885	67%
Semillon	6,372	7,861	14,235	55%
Sultana		132	132	100%
Verdelho	470	1,461	1,931	76%
Vermentino	352	754	1,107	68%
Viognier	872	2,008	2,880	70%
Other white	777	838	1,615	52%
White total	79,355	235,147	314,556	75%
Grand total	283,393	579,434	863,789	67%



Small discrepancies between the total crush and the sum of winery grown plus purchases are a result of purchased fruit where no pricing data has been provided. These are omitted from the purchased column but are included in the total and in the estimated value of all grapes.

State summary

Current plantings by variety and year planted – white winegrapes

Variety	Current area in hectares				Total 2016 area	% planted in 2016
	Pre-2014	2014	2015			
White winegrapes						
Chardonnay	8,951	6	13	11	8,980	0%
Riesling	2,460	10	14	48	2,532	2%
Sauvignon Blanc	2,456	2	0	20	2,478	1%
Semillon	1,031	0	0	0	1,031	0%
Muscat Gordo Blanco	1,009	5	3	0	1,017	0%
Pinot Gris	927	21	13	51	1,012	5%
Colombard	809	0	1	0	810	0%
Viognier	389	0	0	2	391	0%
Traminer (Gewurztraminer)	239	1	0	0	239	0%
Muscat A Petit Grains Blanc (White Frontignac)	203	1	0	0	205	0%
Verdelho	188	0	0	0	188	0%
Sultana	148	0	0	0	149	0%
Chenin Blanc	128	0	0	0	128	0%
Vermentino	49	2	0	0	51	0%
Fiano	43	1	0	6	50	12%
Doradillo	37	0	0	0	37	0%
Savagnin	36	0	0	0	36	0%
Palomino	30	0	0	0	30	0%
Marsanne	26	0	0	0	26	0%
Muscadelle (Tokay)	24	0	0	0	24	0%
Roussanne	23	0	0	0	24	0%
Pedro Ximenez	19	0	0	0	19	0%
Trebbiano	17	0	0	0	17	0%
Albarino	2	0	2	0	3	0%
Other White	110	4	5	2	121	2%
Total white varieties	19,355	53	51	140	19,598	1%

Source: Vinehealth Australia

State summary

Current plantings by variety and year planted – red winegrapes

Variety	Current area in hectares					% planted in 2016
	Pre-2014	2014	2015	2016	Total area	
Red winegrapes						
Shiraz	25,884	463	405	202	26,954	1%
Cabernet Sauvignon	16,770	327	188	49	17,334	0%
Merlot	3,993	4	17	8	4,022	0%
Grenache	1,660	5	4	11	1,681	1%
Pinot Noir	1,627	12	4	10	1,653	1%
Mataro (Mourvedre)	684	16	7	5	711	1%
Petit Verdot	696	2	0	0	697	0%
Malbec	326	33	6	2	366	0%
Tempranillo	314	7	7	2	330	1%
Sangiovese	187	1	0	0	188	0%
Cabernet Franc	173	1	1	1	176	1%
Ruby Cabernet	129	0	0	0	129	0%
Durif (Petite Sirah)	39	16	6	6	67	9%
Montepulciano	37	8	2	4	52	8%
Touriga	37	1	0	4	41	10%
Meunier (Pinot Meunier)	35	0	5	0	40	0%
Nebbiolo	35	0	0	0	36	0%
Zinfandel	31	0	1	0	32	0%
Barbera	29	2	0	0	31	1%
Sagrantino	11	0	1	0	12	0%
Other Red	277	7	8	4	296	1%
Total red varieties	52,975	903	661	309	54,848	1%
Other varieties	1,155	1	19	2	1,177	0%
Total all varieties	73,485	958	731	451	75,624	1%

Source: Vinehealth Australia

State summary

Current plantings by region and year planted

Zone	Region	Pre-2014	2014	2015	2016	Total area	% planted in 2016
Barossa	Barossa Valley	10,646	255	304	87	11,291	1%
	Barossa zone - other	234	0	0	0	234	0%
	Eden Valley	2,231	57	20	38	2,346	2%
	Total for Barossa	13,110	312	324	125	13,871	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	936	32	0	0	968	0%
	Fleurieu zone - other	316	1	0	0	317	0%
	Kangaroo Island	134	0	0	0	134	0%
	Langhorne Creek	5,728	81	21	22	5,852	0%
	McLaren Vale	7,053	131	66	67	7,317	1%
	Southern Fleurieu	491	0	0	0	491	0%
	Total for Fleurieu	14,658	245	86	89	15,079	1%
Limestone Coast	Bordertown	1,254	0	0	0	1,254	0%
	Coonawarra	5,560	167	96	3	5,827	0%
	Limestone Coast zone - other	597	0	0	0	597	0%
	Mount Benson	504	0	0	0	504	0%
	Mount Gambier	303	0	0	0	303	0%
	Padthaway	3,818	51	15	4	3,889	0%
	Robe	729	9	0	0	738	0%
	Wrattonbully	2,645	12	11	11	2,679	0%
	Total for Limestone Coast	15,409	240	123	18	15,790	0%
Lower Murray	Lower Murray zone - other	424	1	3	0	428	0%
	Riverland	19,963	105	144	127	20,340	1%
	Total for Lower Murray	20,387	106	147	127	20,768	1%
Mount Lofty Ranges	Adelaide Hills	3,779	22	14	33	3,848	1%
	Adelaide Plains	472	0	0	5	477	1%
	Clare Valley	5,056	32	37	53	5,178	1%
	Mount Lofty Ranges zone - other	333	1	0	0	334	0%
	Total for Mount Lofty Ranges	9,641	55	51	91	9,838	1%
The Peninsulas	The Peninsulas	70	0	0	0	71	0%
	Total for The Peninsulas	70	0	0	0	71	0%
	Total for all GIs	73,485	958	732	451	75,625	1%

Source: Vinehealth Australia

State summary

Number of growers by region and property size

Zone	Region	<10 ha		10-24 ha		25-49 ha		50-99 ha		+100 ha		Total	
		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	1,312	336	2,319	149	2,375	70	1,304	20	4,005	17	11,316	592
	Barossa zone - other	13	2	12	1	0	0	84	1	126	1	234	5
	Eden Valley	384	90	477	32	276	9	502	7	707	3	2,346	141
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	551	2	968	30
	Fleurieu zone - other	24	8	60	4	0	0	234	3	0	0	317	15
	Kangaroo Island	111	19	23	2	0	0	0	0	0	0	134	21
	Langhorne Creek	104	22	308	19	994	28	1,161	17	3,285	11	5,852	97
	McLaren Vale	1,549	363	1,753	112	1,490	45	1,289	18	1,240	6	7,321	544
	Southern Fleurieu	107	33	117	8	200	5	68	1	0	0	491	47
Limestone Coast	Bordertown	0	0	0	0	39	1	0	0	1,215	4	1,254	5
	Coonawarra	289	52	469	30	737	21	987	15	3,345	11	5,827	129
	Limestone Coast	61	14	30	2	59	2	202	3	244	2	597	23
	Mount Benson	22	4	84	5	60	2	209	3	129	1	504	15
	Mount Gambier	53	13	36	3	106	3	0	0	108	1	303	20
	Padthaway	9	1	56	4	454	12	600	8	2,806	12	3,925	37
	Robe	18	2	83	4	130	3	131	2	377	2	738	13
	Wrattonbully	84	14	300	17	565	15	330	4	1,400	5	2,679	55
Lower Murray	Lower Murray zone -	49	12	192	10	187	6	0	0	0	0	428	28
	Riverland	2,717	554	4,266	270	3,064	90	2,143	30	8,188	36	20,378	980
Mount Lofty Ranges	Adelaide Hills	716	191	980	59	1,025	30	763	11	366	3	3,850	294
	Adelaide Plains	125	43	107	9	129	3	115	2	0	0	477	57
	Clare Valley	618	172	774	46	880	24	925	13	1,983	10	5,180	265
	Mount Lofty Ranges	95	28	47	3	104	3	88	1	0	0	334	35
The Peninsulas	The Peninsulas	17	4	21	2	33	1	0	0	0	0	71	7
Totals by size category		8,556	1,994	12,813	810	13,101	378	11,188	160	30,074	127		
Total for SA ¹												75,732	3,360

¹ Note:grapegrowers can have vineyards in multiple regions, therefore the sum of the category totals is higher than the sum of growers in SA.

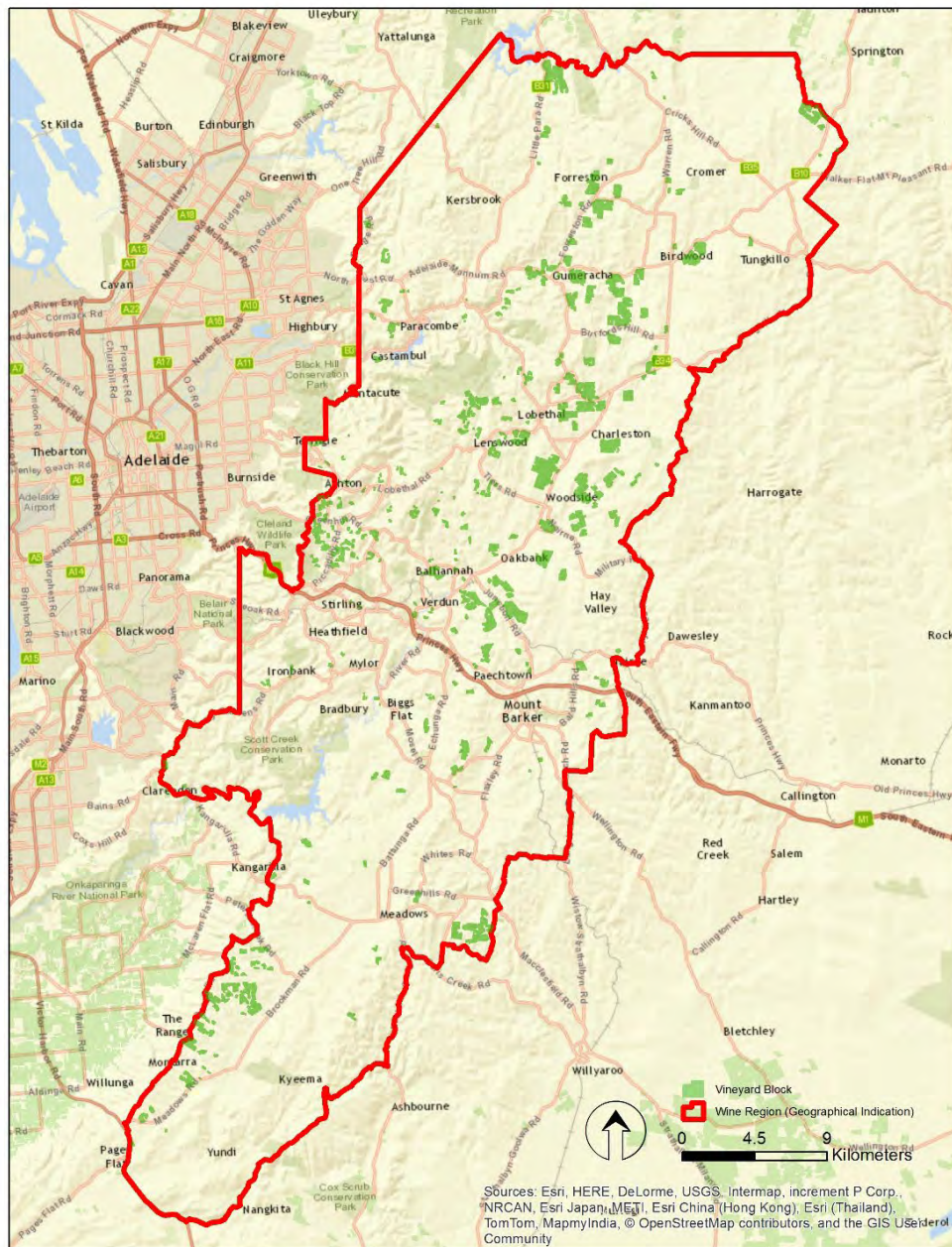
Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

Adelaide Hills Wine Region

Wine Australia July 2017



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Adelaide Hills Wine Region



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Adelaide Hills

Vintage overview

VINTAGE REPORT

The annual rainfall in 2016 (1240mm at Lenswood) was the highest in the Adelaide Hills region since 1992. One third of the season's rainfall was recorded during July and September, resulting in saturated soil conditions at budburst.

Wet soils, combined with cold temperatures, resulted in slow shoot development which caused development of dense canopies and delays in the time of flowering. The late flowering and late veraison meant that vintage was delayed by three to four weeks, compared to vintage in the last decade. Interestingly, the timing of vintage was similar to that experienced in the region as the wine industry was established in the early 90s.

Moist soils meant that flower development was optimal and where flowering conditions were kind, fruit set was at least average to above average. However, there were some exceptions (e.g. Chardonnay and Pinot Noir) where wet conditions resulted in poor set. The cold, wet spring resulted in dense canopies, which significantly increased disease pressure. However, most vineyard operators were responsive to the high disease risk and managed to minimise the presence of both downy mildew and Botrytis, which usually thrive under wet weather.

Weather conditions during fruit ripening were quite dry and favoured full development of colour and flavour as there were few periods of hot weather. Vintage was up to four weeks later than usual but a long and dry Indian summer ensured minimal disease pressure and the opportunity to fully ripen crops.

Richard Hamilton, Adelaide Hills Wine

OVERVIEW OF VINTAGE STATISTICS

A total of 27,335 tonnes of Adelaide Hills winegrapes were crushed in 2017, down from 27,670 tonnes in 2016 but higher than the 22,943 tonnes crushed in 2015.

The 2017 crush is 10% above the five-year average crush from the region (2013-2017). The maximum over that timeframe was 28,559 tonnes in 2013 and the minimum was 17,873 tonnes in 2014.

The total value of winegrapes remained at \$37.5 million as a decline in the tonnes crushed was offset by an increase in the region's weighted average purchase price.

There were varying results by variety. Varieties that recorded increased average purchase prices included Chardonnay (up 6% to \$1,390 per tonne), Gewurztraminer (up 4% to \$770 per tonne), Riesling (up 18% to \$1,034 per tonne), Merlot (up 18% to \$797 per tonne) and Montepulciano (up 5% to \$2,048 per tonne). Those that recorded a decline included Cabernet Sauvignon (down 6% to \$1,526 per tonne), Shiraz (down 7% to 1,869 per tonne), Tempranillo (down 1% to \$1,619 per tonne), Pinot Gris/Grigio (down 1% to \$1,433 per tonne) and Sauvignon Blanc (down 3% to \$1,218 per tonne). The average price for Pinot Noir was stable at \$1,561 per tonne).

The price dispersion data shows that 48% of red varieties were purchased at over \$1500 compared with 47% in 2016. For the whites, 62% were purchased between \$600 and \$1500 and 33% at above \$1500 – the same as last year.

There were 33 hectares of new vines planted in 2016. Half of these new plantings were Pinot Noir (10ha) and Chardonnay (7ha). The total area planted in the region increased by 30 hectares after a net reduction of 47 hectares last year.

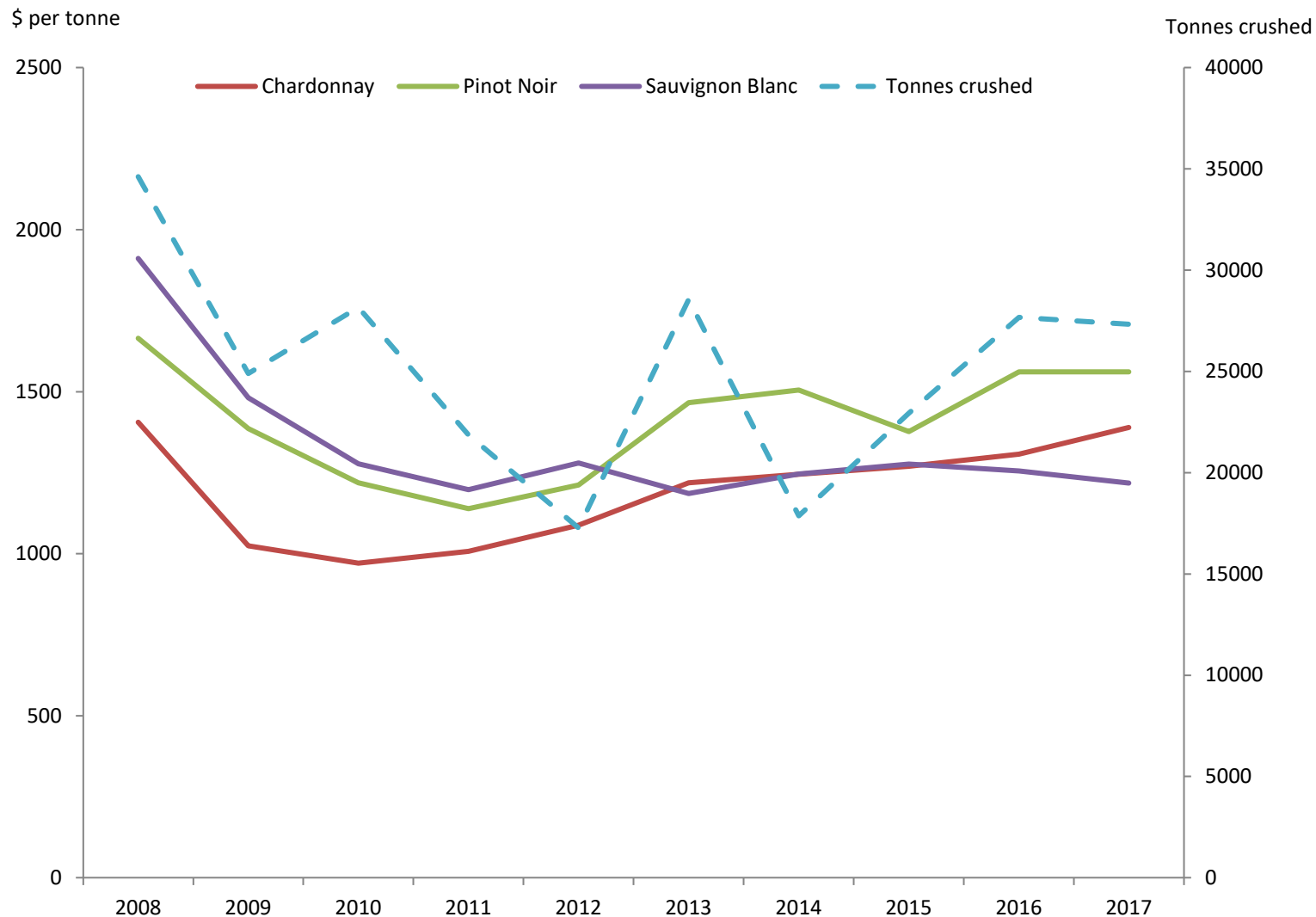
Adelaide Hills

Winegrape intake summary table

	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes	
Red														
Barbera	13					41%	59%	\$25,942	\$1,981	10%			13	\$25,942
Cabernet Franc											26	100%	26	\$39,347
Cabernet Sauvignon	302				65%	24%	11%	\$460,222	\$1,526	-6%	263	47%	565	\$862,298
Dolcetto	4										3	39%	7	\$16,726
Malbec	3												3	\$4,040
Merlot	711			1%	98%	1%		\$566,490	\$797	18%	46	6%	757	\$603,153
Montepulciano	17					56%	44%	\$34,790	\$2,048	5%			17	\$34,790
Pinot Meunier	208				40%	50%	10%	\$306,514	\$1,475	11%			208	\$306,514
Pinot Noir	4249	0%	0%	46%	39%	14%		\$6,632,955	\$1,561	0%	671	14%	4941	\$7,713,325
Sangiovese	37				95%	5%		\$41,598	\$1,132	-14%			37	\$41,598
Shiraz	764				38%	17%	44%	\$1,428,218	\$1,869	-7%	810	51%	1575	\$2,942,134
Tempranillo	91				16%	73%	10%	\$147,649	\$1,619	-1%	56	38%	147	\$238,584
Other red	47					65%	35%	\$92,621	\$1,960	-5%	39	45%	86	\$168,786
Red total	6446	0%	0%	51%	32%	16%		\$9,751,254	\$1,513	0%	1915	23%	8382	\$12,997,237
White														
Chardonnay	4949	0%			70%	19%	12%	\$6,877,268	\$1,390	6%	1003	17%	5952	\$8,278,232
Fiano	9												9	\$17,016
Gewurztraminer	139				93%	7%		\$106,885	\$770	4%	6	4%	145	\$111,792
Muscat a Petit Grains Blanc	16												16	\$12,400
Pinot Gris/Grigio	1621			2%	59%	33%	6%	\$2,323,519	\$1,433	-1%	1228	43%	2849	\$4,083,886
Prosecco											51	100%	51	\$65,500
Riesling	262				78%	20%	1%	\$271,340	\$1,034	18%	38	13%	301	\$311,116
Sauvignon Blanc	5897	0%		5%	67%	26%	2%	\$7,184,775	\$1,218	-3%	3129	35%	9026	\$10,997,907
Semillon	201			41%	52%	7%		\$155,020	\$771	9%	139	41%	340	\$262,066
Vermentino	13												13	\$10,208
Viognier	30				99%	1%		\$30,615	\$1,010	12%	8	21%	38	\$38,773
Other white	104				37%	47%	16%	\$150,830	\$1,455	3%	109	51%	213	\$310,045
White total	13241	0%	3%	67%	24%	6%		\$17,139,876	\$1,294	1%	5713	30%	18953	\$24,498,942
Grand total	19687	0%	2%	62%	27%	9%		\$26,891,130	\$1,366	1%	7628	28%	27335	\$37,496,179

Adelaide Hills

Historical weighted average price vs tonnes crushed

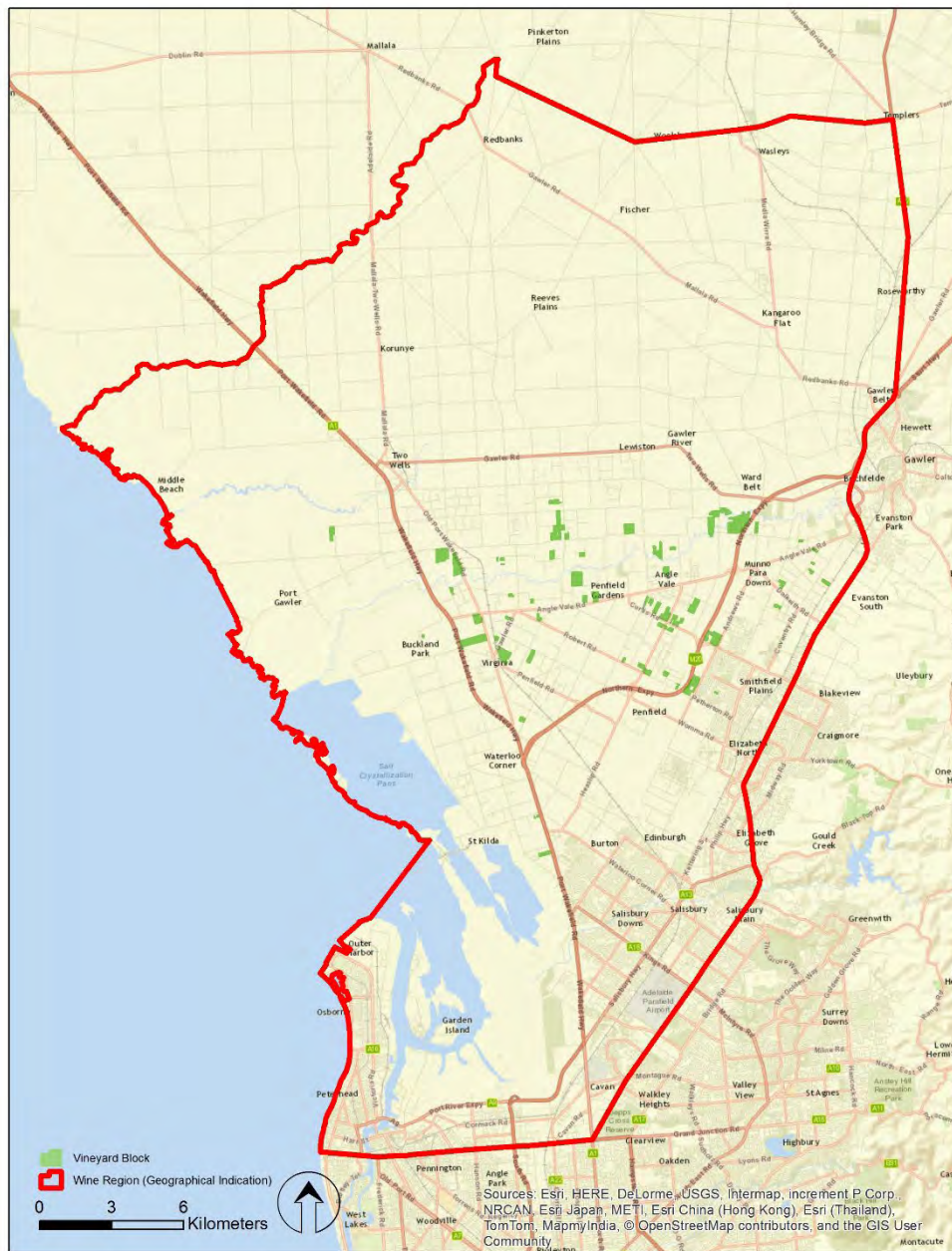


Adelaide Hills

Current plantings by variety and year planted

Variety	Current area in hectares					% planted in 2016
	Pre-2014	2014	2015	2016	Total area	
Red winegrapes						
Cabernet Franc	8	1	0	0	9	3%
Cabernet Sauvignon	204	5	0	3	212	1%
Grenache	2	0	0	0	2	0%
Merlot	159	0	0	0	159	0%
Meunier (Pinot Meunier)	25	0	0	0	25	0%
Nebbiolo	10	0	0	0	10	1%
Other Red	32	1	2	1	35	2%
Petit Verdot	2	0	0	0	2	0%
Pinot Noir	656	7	3	10	675	2%
Sangiovese	12	1	0	0	13	2%
Shiraz	338	3	1	8	350	2%
Tempranillo	29	0	0	1	29	2%
Total red varieties	1,475	17	6	23	1,522	1%
White winegrapes						
Chardonnay	814	2	6	7	829	1%
Gruener Veltliner	16	1	1	0	18	0%
Muscat A Petit Grains Blanc (White Frontignac)	0	0	0	0	0	0%
Other White	28	0	1	0	29	0%
Pinot Gris	251	0	0	0	251	0%
Riesling	66	0	0	0	66	0%
Sauvignon Blanc	983	2	0	2	986	0%
Semillon	54	0	0	0	54	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	2,264	5	8	9	2,286	0%
Rootstock Block	2	0	0	0	2	0%
Unknown variety	38	0	0	1	39	4%
Total all varieties	3,779	22	14	33	3,848	1%

Source: Vinehealth Australia



SA Winegrape Crush Survey

Regional Summary Report 2017

Adelaide Plains Wine Region

Wine Australia July 2017

DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Adelaide Plains Wine Region



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Adelaide Plains

Vintage overview

OVERVIEW OF VINTAGE STATISTICS

A total of 3,496 tonnes of Adelaide Plains winegrapes were crushed in 2016, down from 4,396 tonnes in 2016 but more than the 3,091 tonnes crushed in 2015.

The five year average crush from this region (2013-2017) is 3,843 tonnes, implying that the 2017 yield overall was 9% below average. The minimum crush over the period was the 2015 vintage of 3,091 tonnes and the maximum crush of 4,396 tonnes was recorded in 2013.

The total value of winegrapes declined to just over \$3 million. For most varieties the average price paid increased. Shiraz increased by 7% to \$888 per tonne, Merlot by 6% to 737 per tonne and Cabernet Sauvignon by 1% to \$947 per tonne.

The price dispersion data shows that 95% of red varieties were purchased at between \$600 and \$1500, while 3% were purchased at over \$1500. However, this year, only 1% 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 9% being purchased at below \$600 per tonne compared with 17% in 2016 and 37% in 2015.

There were 5 hectares of new plantings in Adelaide Plains in 2016, with 3 hectares being Pinot Gris/Grigio.

Adelaide Plains

Winegrape intake summary table

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Sauvignon	341				92%	8%	\$323,406	\$947	1%	13	4%	354	\$335,534
Grenache	110											110	\$74,818
Mataro/Mourvedre	56											56	\$56,715
Merlot	284				100%		\$209,054	\$737	6%			284	\$209,054
Shiraz	1845		1%	95%	3%	1%	\$1,638,373	\$888	7%	13	1%	1858	\$1,650,274
Tempranillo	7											7	\$6,560
Total red	2642		1%	95%	3%	0%	\$2,308,925	\$874	2%	26	1%	2669	\$2,332,954
White													
Chardonnay	139											139	\$119,112
Colombard										54	100%	54	\$44,972
Pinot Gris/Grigio	231											231	\$229,925
Sauvignon Blanc	331											331	\$263,832
Semillon	73											73	\$37,225
Total white	774		9%	91%			\$650,095	\$840	4%	54	6%	827	\$695,067
Total all varieties	3416		3%	94%	3%	0%	\$2,959,020	\$866	3%	80	2%	3496	\$3,028,021

Adelaide Plains

Current plantings by variety and year planted

Current area in hectares

Variety	Pre-2014	2014	2015	2016	Total area	% planted in 2016
Red winegrapes						
Cabernet Sauvignon	53	0	0	0	53	0%
Grenache	30	0	0	0	31	1%
Malbec	2	0	0	0	2	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	13	0	0	0	13	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	185	0	0	0	185	0%
Tempranillo	2	0	0	0	2	0%
Total red varieties	349	0	0	0	350	0%
White winegrapes						
Chardonnay	28	0	0	0	28	0%
Chenin Blanc	5	0	0	0	5	0%
Colombard	6	0	0	0	6	0%
Other White	4	0	0	2	6	26%
Pinot Gris	28	0	0	3	31	10%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	27	0	0	0	27	0%
Semillon	5	0	0	0	5	0%
Total white varieties	110	0	0	4	114	4%
Unknown variety	13	0	0	0	13	0%
Total all varieties	472	0	0	5	477	1%

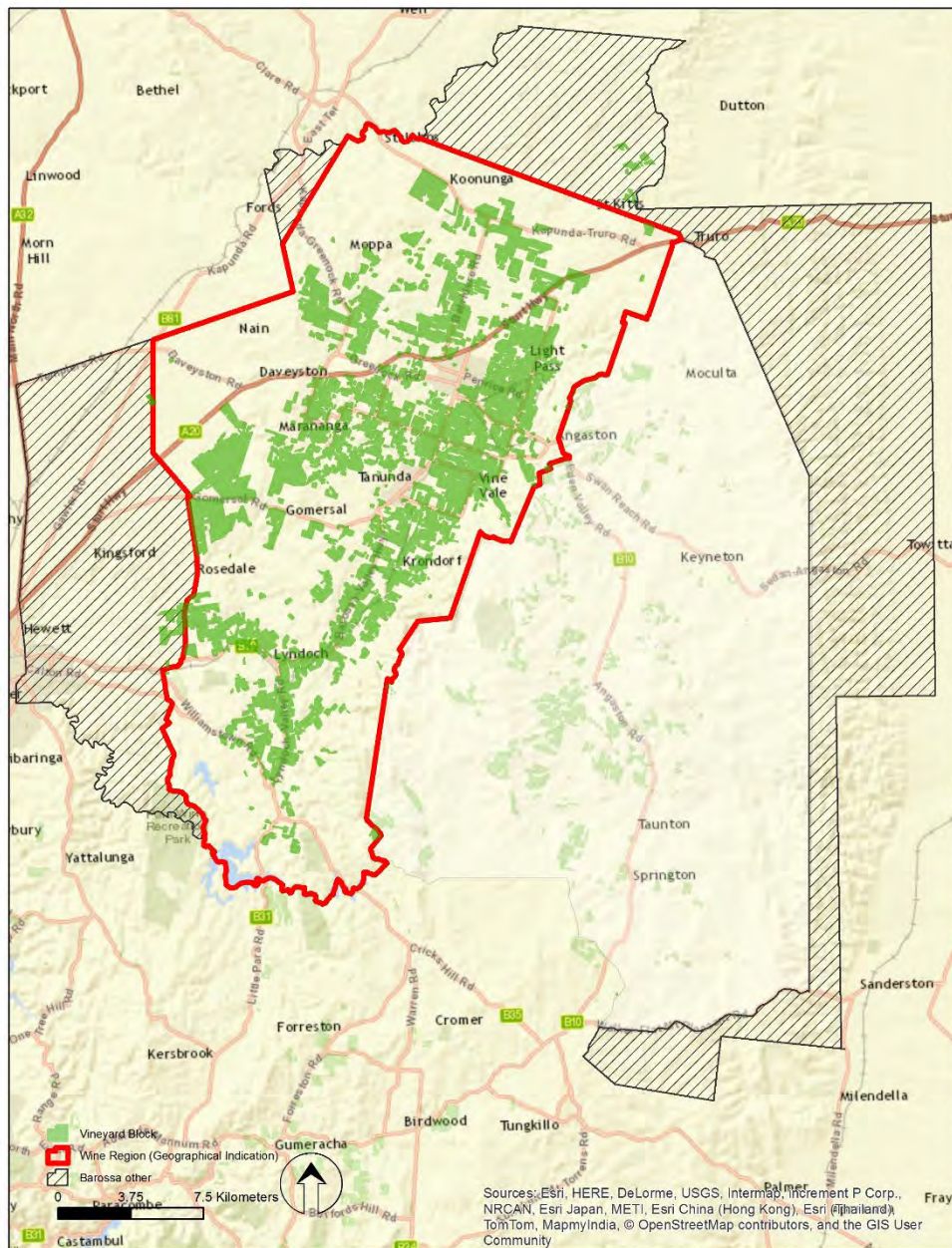
Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

Barossa Valley Wine Region (inc Barossa Zone other)

Wine Australia July 2017



DATUM: GDA84
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Barossa Valley Wine Region
inc Barossa Zone other



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Barossa Valley

Vintage overview

VINTAGE REPORT

Barossa's 2017 vintage finally wrapped up a month or more later than in recent years, with some stand-out wines showing a lot of promise and an overall yield 20-30% above a low five-year average.

In stark contrast to the previous year, the 2016 growing season was one of the wettest on record. Annual (2016) rainfall was 750mm, over 150% of the long term average; winter was 143%, spring 198% and December 135% of average. The resulting wet soils, combined with a cooler than average spring and early summer meant the vines grew slowly but healthily.

As the grapes went through veraison in January and February 2017, Barossa experienced generally average temperatures and only two short bursts of high temperatures. Two well-timed rain events in late January and early February kept vines healthy and in no rush to ripen, with the rest of February remaining dry.

March saw the beginning of an Indian summer, which lasted until late April. This was perfect for consistent ripening of grapes, with good colour development and natural acidity. The average minimum and maximum temperatures for March were 2 to 3°C above average, followed by a notable shift to much cooler nights from late March onwards, which extended vintage for many into May.

Another solid year for Barossa Shiraz, the 2017 vintage promises to deliver an exciting array of wine styles, from "bright, aromatic wines", through to "vibrant, intense, well-structured" and "dense, concentrated" wines from Barossa's many diverse sites.

Other strong varieties for 2017 include Semillon, Cabernet Sauvignon, Grenache and Mataro.

Nicki Robins, Barossa Grape & Wine Association

OVERVIEW OF VINTAGE STATISTICS

Barossa Valley's crush¹ came in at 73,174 tonnes in 2017 – up nearly 20,000 tonnes compared with 2016.

Over the last 5 years, the average Barossa Valley production is 52,082 tonnes, with a low of 43,824 tonnes in 2013. The 2017 crush is the highest in the five year period, and in fact the highest since 2006.

The total value of grapes from the region is estimated to have been \$147 million, up from \$102 million in 2016.

Most of the major varieties recorded an increase in average price paid. The average price of Shiraz increased by 2% to a record \$2,284 per tonne. The average price of Cabernet Sauvignon increased 8% to \$2,049 per tonnes, also a record. Average prices also increased for Grenache (up 5% to \$1698) and Semillon (up 6% to \$720 per tonne) while Chardonnay was stable at \$601 per tonne.

The price dispersion data shows that 65% of red grapes were purchased at over \$2000 per tonne (compared with 60% in 2016 and 40% in 2015), while 91% were purchased at \$1500 or more.

There were 87 hectares of new plantings in the Barossa Valley in 2016 (including top-working and replacements) compared with 304 hectares planted in 2015 and 255 hectares in 2014. Of the new plantings, Shiraz accounted for nearly three-quarters (77 hectares) and Cabernet Sauvignon 15% (13 hectares).

¹ Report includes crush from Barossa Zone – other (3008 tonnes)

Barossa Valley

Winegrape intake summary table - red

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Franc	107				98%	0%	\$120,592	\$1,123	2%	53	33%	160	\$179,856
Cabernet Sauvignon	4658				6%	47%	\$9,542,712	\$2,049	8%	3616	44%	8274	\$16,944,838
Durif	83					75%	\$137,012	\$1,659	6%	7	8%	89	\$148,195
Grenache	2658			0%	27%	51%	\$4,512,133	\$1,698	5%	1183	31%	3842	\$6,519,108
Malbec	29					61%	\$50,775	\$1,759	8%	71	71%	100	\$176,159
Mataro/Mourvedre	764				2%	56%	\$1,511,232	\$1,979	5%	474	38%	1238	\$2,451,547
Merlot	1456				78%	22%	\$1,636,033	\$1,123	4%	251	15%	1707	\$1,920,909
Montepulciano	11					100%	\$22,176	\$2,100	34%	33	76%	44	\$92,148
Muscat a Petit Grains Rouge/Rose	13											13	\$12,287
Nero d'Avola	16				24%	76%	\$21,540	\$1,379	-5%	12	44%	28	\$38,764
Petit Verdot	39				57%	43%	\$49,457	\$1,273	-6%	33	46%	72	\$91,087
Pinot Noir	200			100%			\$146,648	\$734	-7%			200	\$146,648
Roussanne	22					100%	\$36,168	\$1,610	30%	2	9%	25	\$39,921
Sangiovese	296				94%	6%	\$406,874	\$1,375	1%	67	18%	363	\$498,935
Shiraz	26386	0%	0%	1%	19%	79%	\$60,257,201	\$2,284	2%	22456	46%	48844	\$110,771,400
Tempranillo	357				8%	92%	\$583,598	\$1,635	4%	104	23%	461	\$754,849
Other red	137				54%	24%	\$221,992	\$1,623	1%	149	52%	286	\$464,461
Total red	37230	0%	0%	9%	26%	65%	\$79,268,428	\$2,129	5%	28513	43%	65744	\$141,251,111

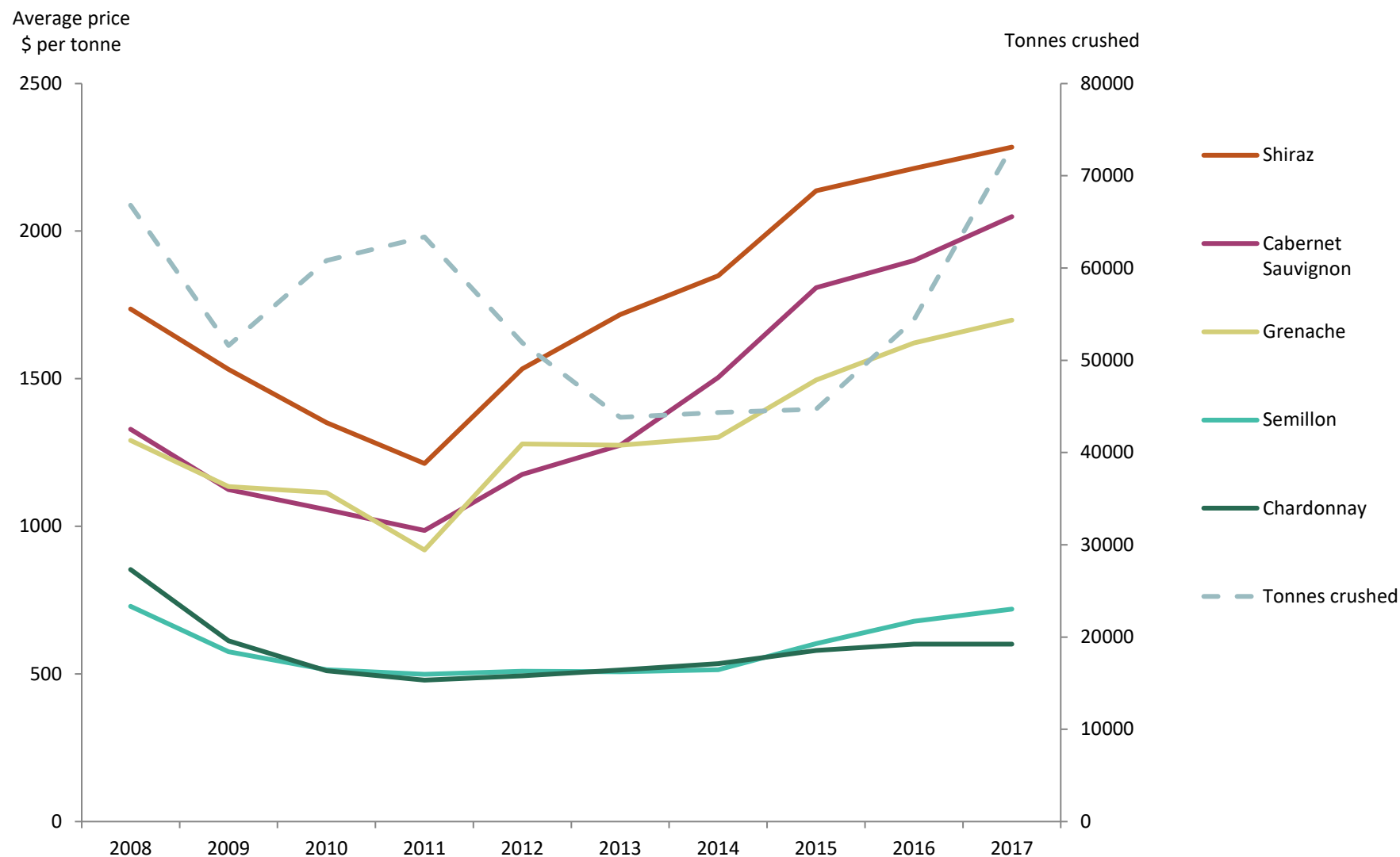
Barossa Valley

Winegrape intake summary table - white

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
White													
Chardonnay	1517		31%	69%			\$911,823	\$601	0%	466	23%	1983	\$1,191,558
Chenin blanc	37		34%	44%	22%		\$32,688	\$885	-22%			37	\$32,688
Fiano										32	100%	32	\$23,928
Gewurztraminer	107											107	\$80,762
Marsanne	13			52%		48%	\$21,904	\$1,688	5%	57	82%	70	\$118,509
Moscato Giallo	11											11	\$8,640
Muscadelle (Tokay)	21		11%	89%			\$16,152	\$760	-5%			21	\$16,152
Muscat a Petit Grains Blanc	270		50%	50%			\$197,676	\$732	-9%	87	24%	357	\$261,095
Pinot Gris/Grigio	80			100%			\$79,358	\$990	13%	80	50%	160	\$158,290
Riesling	644	0%	2%	96%	2%		\$540,527	\$839	5%	351	35%	998	\$975,903
Sauvignon Blanc	521	0%	9%	91%			\$420,731	\$808	-2%	33	6%	555	\$448,763
Semillon	1968	0%	28%	72%	0%	0%	\$1,417,076	\$720	6%	444	18%	2414	\$1,739,123
Vermentino	79			100%			\$74,957	\$944	4%	7	9%	87	\$81,988
Viognier	298			91%	2%	6%	\$378,782	\$1,273	-2%	52	15%	350	\$445,169
Other white	31			73%	27%		\$35,569	\$1,154	-4%	216	88%	247	\$285,080
Total white	5598	0	22	77%	1%	1%	\$4,216,645	\$753	0%	1825	25%	7429	\$5,867,649
Total all varieties	42828	0%	3%	18%	23%	56%	\$83,485,073	\$1,949	7%	30337	41%	73174	\$147,118,760

Barossa Valley

Historical weighted average price vs tonnes crushed



Barossa Valley

Current plantings by variety and year planted – red winegrapes

Includes Barossa Zone other (233 hectares)

	Current area in hectares					% planted
Variety	Pre-2014	2014	2015	2016	Total area	in 2016
Red winegrapes						
Cabernet Franc	28	0	0	0	28	0%
Cabernet Sauvignon	1,464	20	73	13	1,570	1%
Durif (Petite Sirah)	20	0	1	0	21	0%
Grenache	663	2	0	5	670	1%
Malbec	24	0	2	0	26	0%
Mataro (Mourvedre)	250	4	3	0	257	0%
Merlot	338	0	0	1	339	0%
Other Red	99	3	2	2	105	2%
Petit Verdot	19	0	0	0	19	0%
Pinot Noir	37	0	0	0	37	0%
Sangiovese	27	0	0	0	27	0%
Shiraz	6,554	224	220	64	7,061	1%
Tempranillo	99	0	2	1	102	1%
Zinfandel	13	0	0	0	13	0%
Total red varieties	9,634	253	302	87	10,276	1%

Source: Vinehealth Australia

Barossa Valley

Current plantings by variety and year planted – white winegrapes

Includes Barossa Zone other (233 hectares)

Variety	Current area in hectares				Total area	% planted in 2016
	Pre-2014	2014	2015	2016		
White winegrapes						
Chardonnay	328	0	0	0	328	0%
Chenin Blanc	15	0	0	0	15	0%
Marsanne	11	0	0	0	11	0%
Muscadelle (Tokay)	13	0	0	0	13	0%
Muscat A Petit Grains Blanc	53	1	0	0	54	0%
Other White	47	0	0	0	48	0%
Pedro Ximenez	5	0	0	0	5	0%
Pinot Gris	16	0	1	0	16	0%
Riesling	168	0	1	0	169	0%
Sauvignon Blanc	60	0	0	0	60	0%
Savagnin	1	0	0	0	1	0%
Semillon	352	0	0	0	352	0%
Vermentino	7	0	0	0	7	0%
Viognier	57	0	0	0	57	0%
Total white varieties	1,133	2	2	0	1,137	0%
Unknown variety	112	0	0	0	112	0%
Total all varieties	10,879	255	304	87	11,525	1%

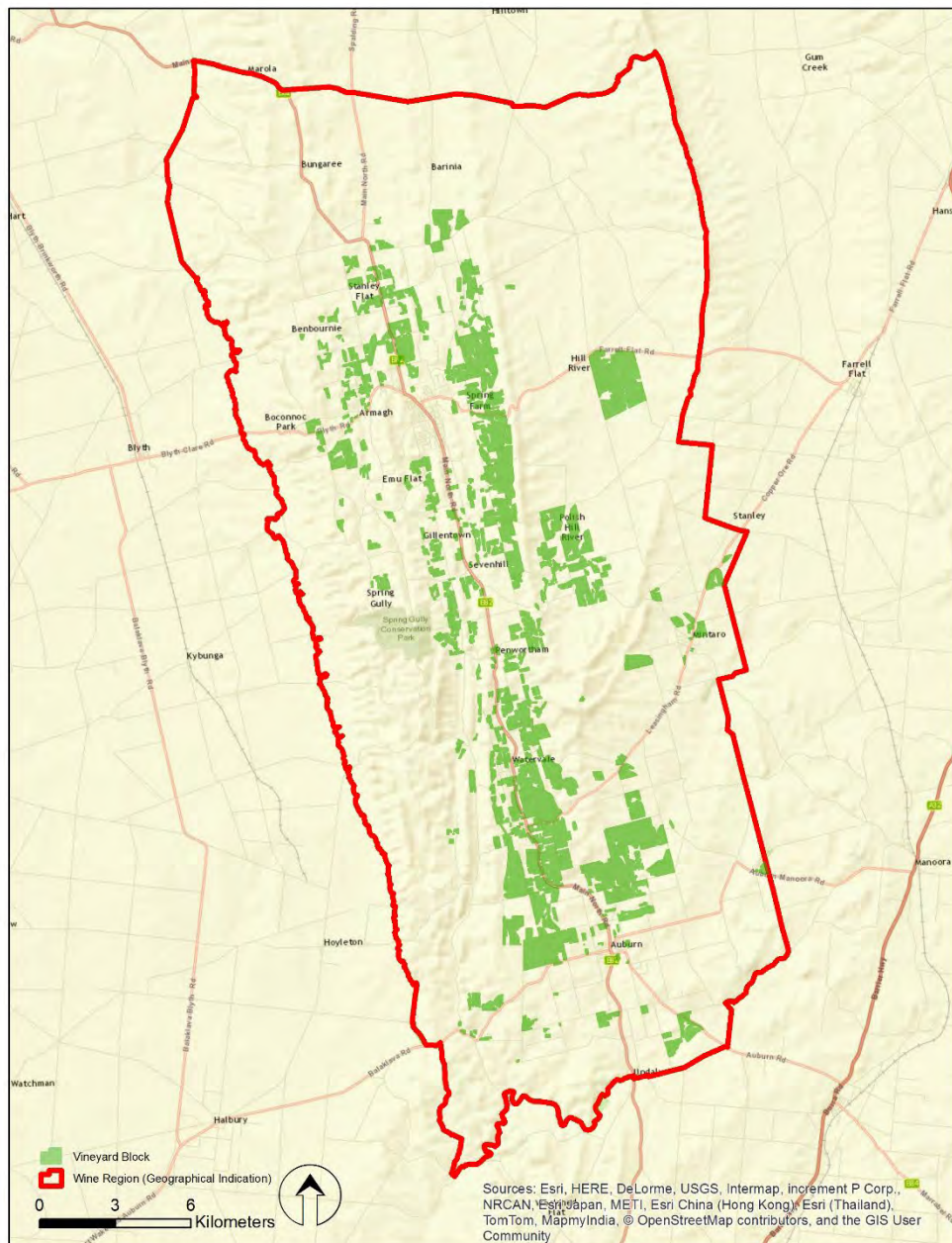
Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

Clare Valley Wine Region

Wine Australia July 2017



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 6th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Clare Valley
Wine Region



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Clare Valley

Vintage overview

VINTAGE REPORT

The vintage kicked off in the last week in February in the early sub-regions and in earnest in early to mid March for the majority of the region, approximately one month later than last year and the latest start to vintage since the forgettable 2011 vintage.

The growing season was late starting with budburst up to a month later than recent years due to the wet and cold winter. Severe storms at the end of September dumped over 120mm of rain across the region. Soil temperatures remained very low due to the waterlogged conditions and the below average ambient temperatures recorded through the spring. Some spring frost damage was reported in the south-eastern and lower-lying parts of the region. Bud burst was quite variable generally and early shoot growth and flowering not surprisingly was three weeks later than average. Weather conditions during flowering were however generally favourable and hence fruit set was good across all varieties. Over the full year 2016 rainfall totals between 800mm and 1000mm were recorded across the region, making it the wettest calendar year since 2000.

Damp and humid conditions prevailed pretty much right through the early to mid part of the growing season, and the calendar year ended with another significant storm and rain event between Christmas and New Year.

Vintage eventually ground to a slow completion early in May although some late harvest/botrytis style white parcels weren't harvested until mid-May. Overall 2017 would appear to be an above average vintage in terms of production. Across the board fruit quality was again good to very good and there should be some terrific wines coming through from 2017. Riesling was again the standout white variety and the Cabernets and the later alternative red varieties also stood out.

Andrew Pike, Chairperson, Clare Valley Winemakers

OVERVIEW OF VINTAGE STATISTICS

A total of 27,752 tonnes of Clare Valley winegrapes were crushed in 2017, up from 20,795 tonnes in 2016 and 16,093 tonnes in 2015. Over the past five years (including 2017), the average crush for Clare has been 20,476 tonnes, making this year's crush 36% above the average and the highest since 2006, while the 2015 crush of 16,039 tonnes was the lowest since 2000.

The total value of winegrapes increased to \$32 million from \$24 million mainly due to increased yields.

The average price of the two major red varieties declined compared with 2016. The average for Shiraz declined by 1% to \$1,417 and Cabernet Sauvignon fell by 7% to \$1,095 per tonne. The results for white varieties were mixed; Riesling increased by 2% to \$1,035 per tonne while Chardonnay declined by 13% to \$717 per tonne.

The price dispersion data shows that 20% of red varieties were sold at above \$1500 per tonne, the same proportion as 2016. 92% of white varieties were purchased at between \$600 and \$1500 – a relatively narrow dispersion range.

There were 53 hectares of new vines planted in 2016. Over 90% of these new plantings were Riesling.

Clare Valley

Winegrape intake summary table – red

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Barbera										13	100%	13	\$16,154
Cabernet Franc										77	100%	77	\$98,493
Cabernet Sauvignon	2176	0%		94%	6%	1%	\$2,382,886	\$1,095	-7%	3029	58%	5204	\$5,700,287
Grenache	147			56%	32%	11%	\$216,950	\$1,471	-3%	177	55%	324	\$477,417
Malbec	183			75%	25%		\$226,970	\$1,239	3%	116	39%	300	\$371,231
Mataro/Mourvedre	111			24%	67%	9%	\$162,780	\$1,463	-7%	59	35%	170	\$249,025
Merlot	858	2%		100%			\$724,001	\$843	2%	650	43%	1522	\$1,283,377
Montepulciano	6					100%	\$11,740	\$2,000	0%	9	61%	15	\$30,406
Muscat a Petit Grains Rouge/Rose										3	100%	3	\$3,768
Nero d'Avola	2									4	73%	6	\$10,440
Petit Verdot										34	100%	34	\$42,848
Pinot Noir										60	100%	60	\$76,581
Ruby Cabernet										12	100%	12	\$15,683
Sangiovese	144			100%			\$142,758	\$990	-1%	42	23%	186	\$184,470
Shiraz	5296			74%	19%	7%	\$7,504,397	\$1,417	-1%	4428	46%	9724	\$13,779,262
Tempranillo	88			100%			\$95,011	\$1,084	-1%	77	47%	165	\$178,560
Other red										45	100%	45	\$57,603
Total red	9011	0%		81%	15%	5%	\$11,470,356	\$1,273	0%	8836	49%	17860	\$22,575,604

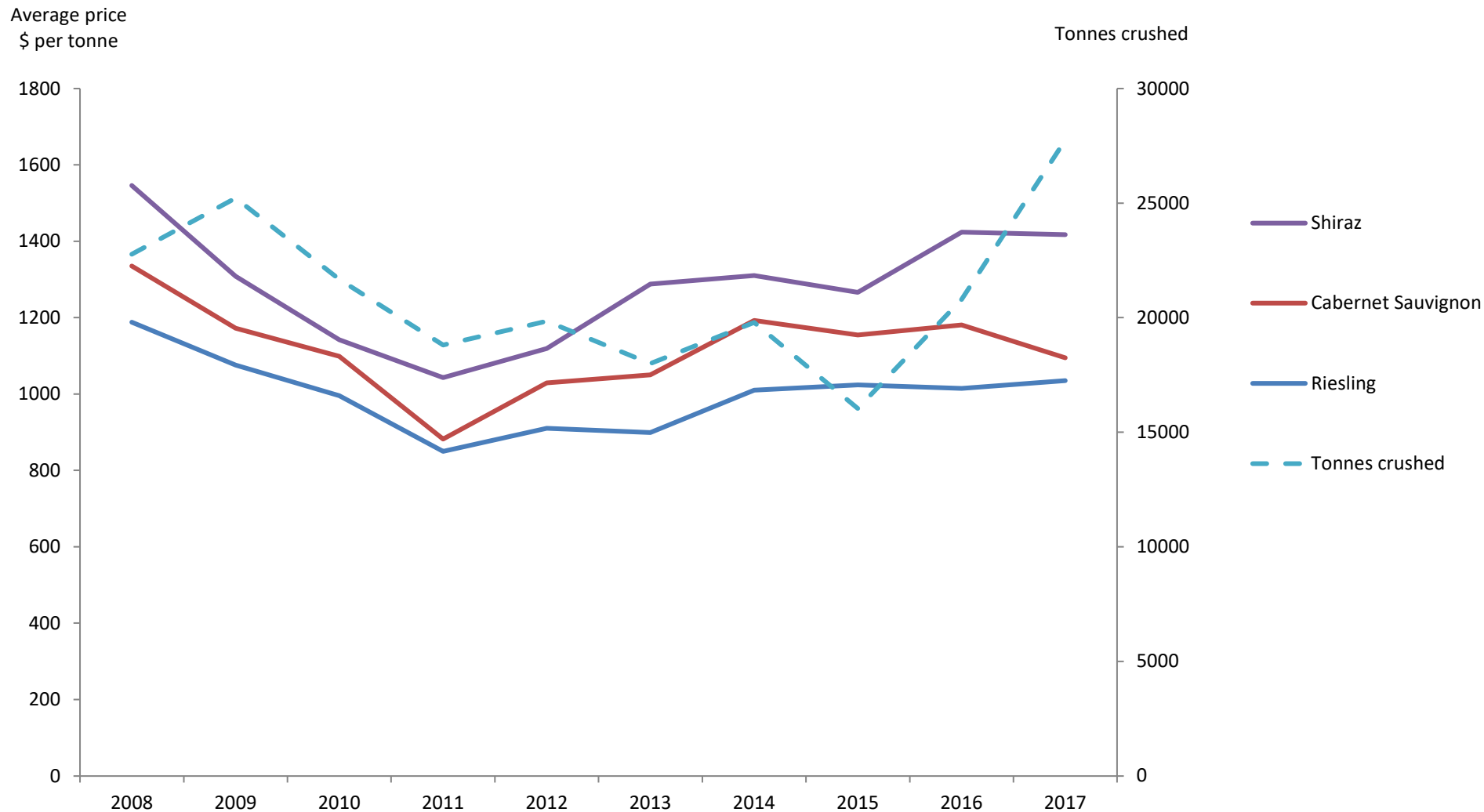
Clare Valley

Winegrape intake summary table – white

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
White													
Chardonnay	781			19%	81%		\$559,890	\$717	-13%	487	38%	1268	\$908,686
Fiano	23				100%		\$32,398	\$1,406	0%	37	61%	60	\$84,118
Gewurztraminer	164		1%		99%		\$117,797	\$720	2%	45	22%	209	\$150,276
Muscadelle (Tokay)										13	100%	13	\$13,064
Pinot Gris/Grigio	175				100%		\$206,119	\$1,178	-1%	314	64%	489	\$575,997
Riesling	4000		1%		93%	5%	\$4,139,336	\$1,035	2%	2925	42%	6972	\$7,214,592
Sauvignon Blanc	3				100%		\$4,466	\$1,400		78	96%	81	\$113,982
Semillon	335		0%	10%	90%		\$252,602	\$755	-4%	285	46%	619	\$467,441
Verdelho										19	100%	19	\$18,000
Vermentino	13									2	15%	16	\$17,784
Viognier	6				100%		\$5,985	\$1,050	-15%	62	92%	68	\$70,898
Other white										79	100%	79	\$77,044
Total white	5500	1%	3%	92%	4%	1%	\$5,333,672	\$970	-1%	4346	44%	9892	\$9,711,883
Total all varieties	14510	0%	1%	85%	10%	3%	\$16,804,027	\$1,158	1%	13183	48%	27752	\$32,287,487

Clare Valley

Historical weighted average price vs tonnes crushed



Clare Valley

Current plantings by variety and year planted

Variety	Current area in hectares				Total % planted	
	Pre-2014	2014	2015	2016	area	in 2016
Red winegrapes						
Cabernet Franc	15	0	0	0	15	0%
Cabernet Sauvignon	1,171	14	3	0	1,188	0%
Grenache	60	0	0	0	60	0%
Malbec	73	1	0	0	75	0%
Mataro (Mourvedre)	33	0	2	1	36	2%
Merlot	277	0	0	0	277	0%
Nebbiolo	4	0	0	0	4	0%
Other Red	34	0	1	0	35	0%
Sangiovese	27	0	0	0	27	0%
Shiraz	1,834	12	21	5	1,873	0%
Tempranillo	31	1	2	0	33	0%
Total red varieties	3,561	28	29	6	3,624	0%
White winegrapes						
Chardonnay	191	0	0	0	191	0%
Other White	25	1	1	0	27	0%
Pinot Gris	46	2	2	0	50	0%
Riesling	1,024	0	5	48	1,077	4%
Sauvignon Blanc	20	0	0	0	20	0%
Semillon	132	0	0	0	132	0%
Traminer (Gewurztraminer)	27	0	0	0	27	0%
Verdelho	4	0	0	0	4	0%
Viognier	13	0	0	0	13	0%
Total white varieties	1,482	3	8	48	1,541	3%
Unknown variety	11	0	0	0	11	0%
Rootstock Block	1	0	0	0	1	0%
Total all varieties	5,056	32	37	53	5,178	1%

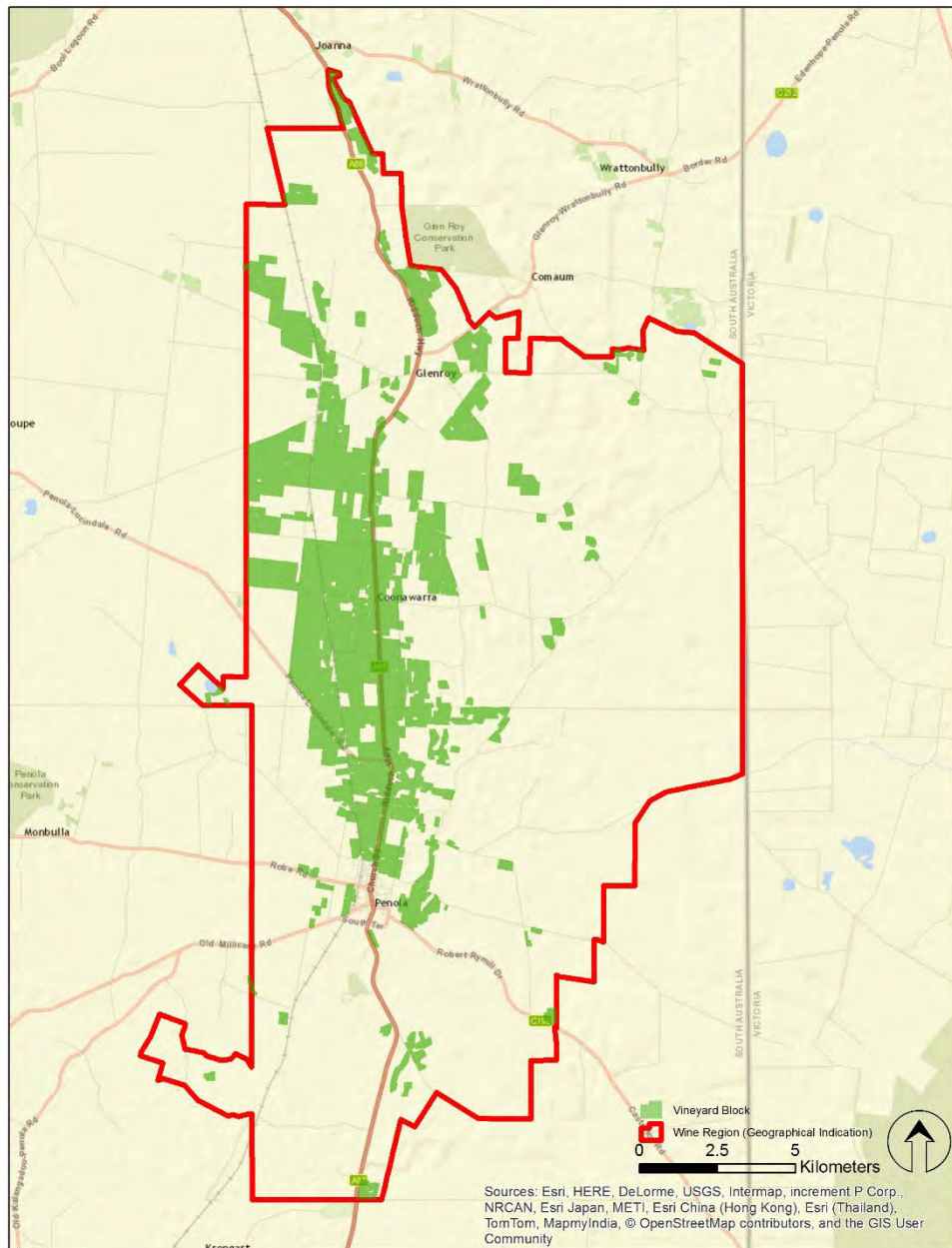
Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

Coonawarra Wine Region

Wine Australia July 2017



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Coonawarra
Wine Region



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Coonawarra

Vintage overview

VINTAGE REPORT

A cool growing season and above average winter rains leading into the 2017 vintage saw the region return to what could be best described as a more traditional Coonawarra vintage. The cooler conditions resulted in budburst being delayed by up to three weeks, with flowering two weeks later. A mild summer followed, with a welcome spell of hot days in late January.

These factors saw harvest commence towards the end of March and continue through to early May. Coonawarra has not had a vintage which commenced this late since the outstanding 2004 vintage. The major concern was the highly variable weather which can occur at this time of year.

The start of vintage saw white grapes with good varietal definition and the reds, albeit at lower sugar levels than recent vintages showing excellent colour and concentrated fruit flavours.

April saw a large rain event toward the end of the month, and this, combined with above average yields meant that not all fruit in Coonawarra was harvested. With the integrity and reputation of Coonawarra of upmost importance, it was pleasing that grape growers and winemakers alike refused to pick fruit of inferior quality, and with this in mind it is anticipated that yield for the region will be similar to previous years.

Reports of good quality wines in tanks around the area are common, with winemakers being impressed with the fruitiness of the whites, the deep colour, and elegant fruit flavours of the medium bodied reds.

Allen Jenkins, President, Coonawarra Grape & Wine Incorporated

OVERVIEW OF VINTAGE STATISTICS

A total of 36,509 tonnes of Coonawarra winegrapes were crushed in 2017, up from 35,497 tonnes in 2016.

Over the past five years, the average crush of Coonawarra fruit is 31,385 tonnes, making the 2017 crush the largest in the period and 16% above the average. The smallest in the period was 23,480 tonnes in 2014.

The total value of winegrapes declined from \$47 million to \$41 million due to lower average prices for the major red varieties. Cabernet Sauvignon decreased by 25% to \$1,172 per tonne and Shiraz by 7% to \$1,216 per tonne.

The price dispersion data shows that 68% of Cabernet Sauvignon tonnes were purchased at between \$600 and \$1500, while 24% were purchased at over \$1500. For Shiraz, 66% was purchased between \$600 and \$1500 and 29% at above \$1500. On the other hand, in the white varieties more than 20% of fruit was purchased at below \$600 per tonne.

There were just three hectares of new vines planted in Coonawarra in the 2016, after 96 hectares the previous year. Total area remained stable at 5827 hectares.

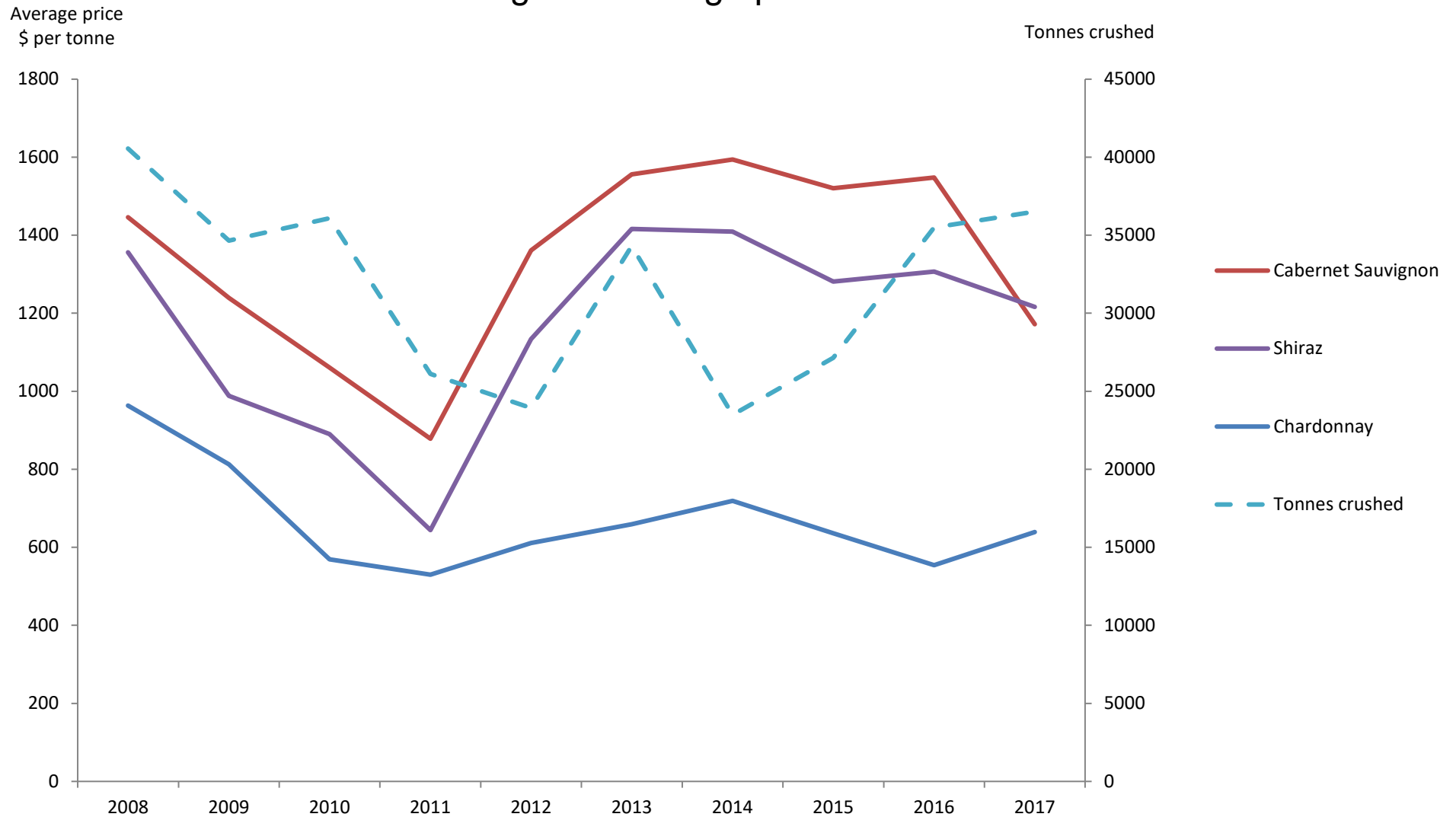
Coonawarra

Winegrape intake summary table

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Franc	8				83%	17%	\$8,092	\$1,066	-3%	65	90%	72	\$77,136
Cabernet Sauvignon	6760	4%	3%		68%	18%	\$7,924,231	\$1,172	-25%	12630	65%	19390	\$22,729,282
Malbec	6					100%	\$12,217	\$1,980		83	93%	90	\$177,329
Merlot	462			6%	89%	5%	\$445,729	\$965	10%	1546	77%	2008	\$1,937,504
Petit Verdot	18				100%		\$19,250	\$1,100		133	88%	151	\$165,759
Pinot Meunier										30	100%	30	\$34,953
Pinot Noir	89				100%		\$92,076	\$1,036	-11%	127	59%	216	\$224,028
Shiraz	1770			5%	66%	29%	\$2,153,171	\$1,216	-7%	8781	83%	10551	\$12,834,253
Other red	26											26	\$42,409
Total red	9138	3%	4%	4%	69%	20%	\$10,697,175	\$1,171	-22%	23395	72%	32533	\$38,222,652
White													
Chardonnay	478		0%	19%	81%		\$305,729	\$639	15%	1466	75%	1945	\$1,243,277
Gewurztraminer										18	100%	18	\$12,629
Pinot Gris/Grigio	15											15	\$18,072
Riesling	33				100%		\$26,839	\$815	-4%	604	95%	637	\$519,356
Sauvignon Blanc	296			30%	70%		\$226,843	\$766	14%	866	75%	1162	\$889,649
Semillon	45				100%		\$43,806	\$980		135	75%	180	\$176,251
Other white										19	100%	19	\$13,566
Total white	867	0%	21%	21%	79%		\$621,289	\$716	21%	3108	78%	3975	\$2,872,800
Total all varieties	10005	3%	5%	5%	70%	18%	\$11,318,463	\$1,131	-23%	26503	73%	36509	\$41,095,452

Coonawarra

Historical weighted average price vs tonnes crushed



Coonawarra

Current plantings by variety and year planted

Variety	Current area in hectares				% planted in	
	Pre-2014	2014	2015	2016	Total area	2016
Red winegrapes						
Cabernet Franc	28	0	0	1	29	3%
Cabernet Sauvignon	3,475	129	50	2	3,655	0%
Malbec	18	0	0	0	18	0%
Merlot	362	0	8	1	370	0%
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	1,145	39	39	0	1,222	0%
Total red varieties	5,094	167	96	3	5,361	0%
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	98	0	0	0	98	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	466	0	0	0	466	0%
Total all varieties	5,560	167	96	3	5,827	0%

Source: Vinehealth Australia



Wine Australia July 2017

Currency Creek

Vintage overview

VINTAGE REPORT

After a variable start to bud burst and the season providing many disease challenges during the growing period and around veraison, a stretch of about four weeks of ideal ripening weather in the middle of vintage saved the season at Currency Creek.

Good late winter rainfall created ideal opening sub-soil moisture, a situation that prevailed during the whole growing season. Shoot length was short during the early part of the season due to cooler than average temperatures but caught up later in the season.

The weather conditions at flowering were variable but allowed good fruit set in most red varieties as well as Sauvignon Blanc and Pinot Gris. Chardonnay was the big loser with very poor set leading to severely reduced yields.

Disease pressure throughout the season was high, resulting in double the normal number of fungicides being applied, and harvest was three weeks later than average.

Whites benefited from the cooler climatic conditions and maritime influence of the Currency Creek region, with good fruit ripeness and naturally balanced acidity.

The reds were left hanging to gain full physiological maturity and were picked very late this year, with first fruit coming in from about 10th April and a compressed harvest program completed by 3rd May. Such prolonged hang time resulted in great varietal character and colour and red variety yields were generally as expected.

David Watkins, Currency Creek Wine Region Association

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Currency Creek in 2017 was 9,211 tonnes, down on the 2016 harvest of 10,169 tonnes but up on the 2014 harvest of 7,595 tonnes.

Over the past five years, the average crush for the region is 8,855 tonnes. The 2016 crush was the highest in the five year period, while the minimum crush over the period was 7,269 tonnes in 2014. The 2017 crush was 4% above the five-year average.

The value of fruit from the region was \$7 million, compared with \$8.5 million in 2016, as a result of the lower tonnes crushed and a decline in average prices. Average prices for the two main varieties both declined – Shiraz by 4% to \$836 per tonne and Cabernet Sauvignon by 14% to \$783 per tonne.

The price dispersion data shows that 83% of red tonnages were purchased at between \$600 and \$1500, while 41% of the white tonnes were purchased within the same price.

There were no new plantings recorded for the region for the second year in a row. Total plantings are 968 hectares, three-quarters of which are red varieties.

Currency Creek

Winegrape intake summary table

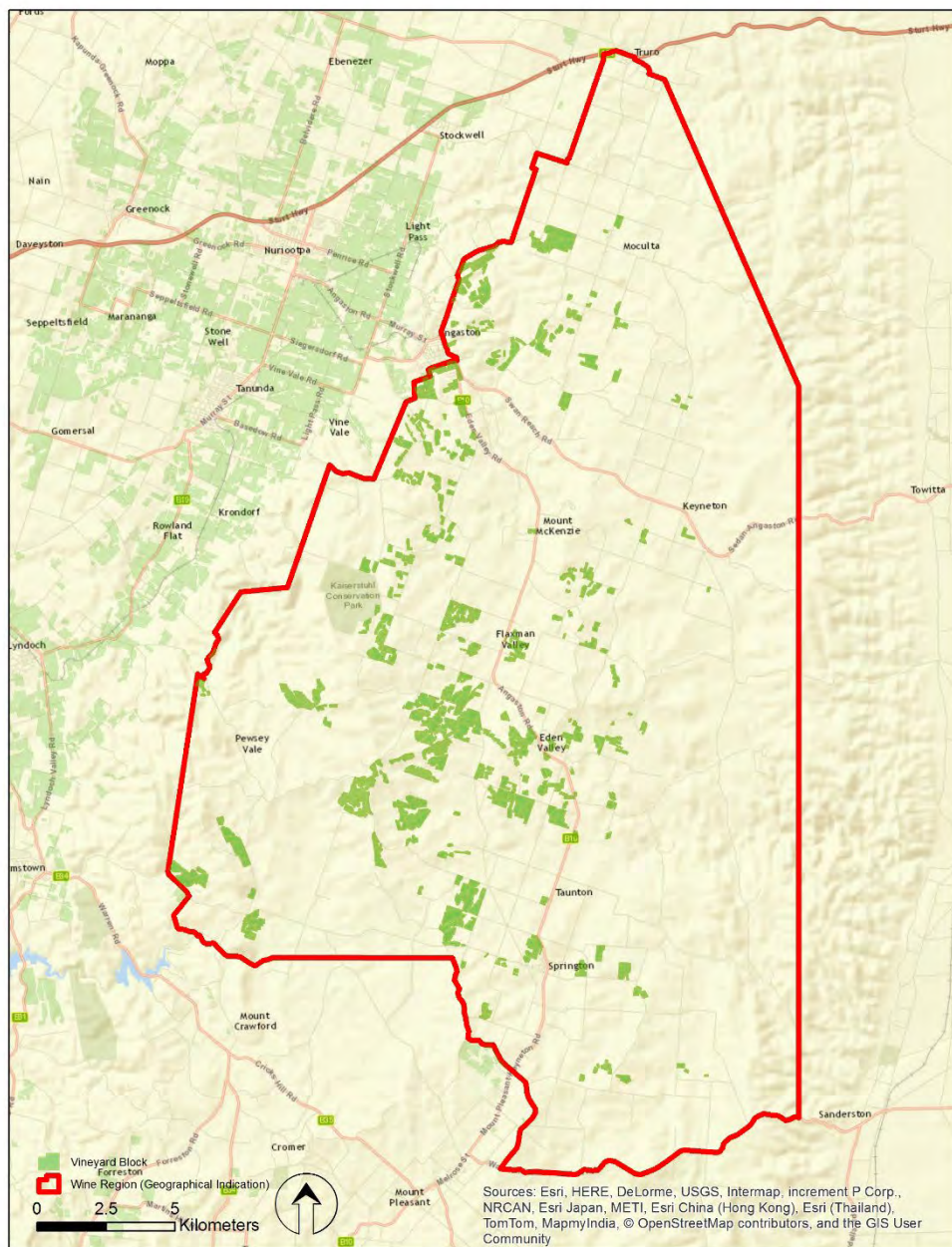
Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Sauvignon	804	11%	7%	92%			\$629,481	\$783	-14%	1672	65%	2556	\$2,000,100
Durif										73	100%	73	\$59,522
Grenache										73	100%	73	\$59,752
Lagrein	10											10	\$11,374
Malbec										9	100%	9	\$7,153
Merlot	91									454	83%	545	\$399,976
Nero d'Avola	9											9	\$10,318
Pinot Noir										44	100%	44	\$36,422
Sangiovese	39											39	\$35,355
Shiraz	1155	25%	13%	83%	4%		\$966,005	\$836	-4%	1873	57%	3315	\$2,771,236
Tempranillo	42	17%		67%	33%		\$45,750	\$1,097	-12%			49	\$53,430
Total red	2152	18%	11%	86%	3%		\$1,765,205	\$820	-7%	4197	62%	6722	\$5,444,637
White													
Chardonnay	130		97%	3%			\$57,225	\$441		656	83%	786	\$346,538
Gewurztraminer										122	100%	122	\$84,536
Pinot Gris/Grigio	49			100%			\$53,260	\$1,082	-6%	272	85%	321	\$347,648
Prosecco	33											33	\$42,770
Sauvignon Blanc	186		72%	28%			\$109,683	\$590	-4%	998	84%	1184	\$698,767
Vermentino	42											42	\$41,203
Total white	440		59%	41%			\$304,141	\$691	-4%	2049	82%	2489	\$1,561,462
Total all varieties	2592	15%	19%	78%	2%	0%	\$2,069,346	\$798	-7%	6246	68%	9211	\$7,006,099

Currency Creek

Current plantings by variety and year planted

	Current area in hectares					% planted
Variety	Pre-2014	2014	2015	2016	Total area	in 2016
Red winegrapes						
Cabernet Sauvignon	291	2	0	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	15	0	0	17	0%
Petit Verdot	4	0	0	0	4	0%
Pinot Noir	11	0	0	0	11	0%
Sangiovese	4	0	0	0	4	0%
Shiraz	326	3	0	0	329	0%
Tempranillo	5	0	0	0	5	0%
Total red varieties	716	20	0	0	736	0%
White winegrapes						
Chardonnay	111	0	0	0	111	0%
Other White	18	0	0	0	18	0%
Pinot Gris	17	12	0	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	12	0	0	230	0%
Unknown variety	2	0	0	0	2	0%
Total all varieties	936	32	0	0	968	0%

Source: Vinehealth Australia



SA Winegrape Crush Survey

Regional Summary Report 2017

Eden Valley Wine Region

Wine Australia July 2017

DATUM: GDA94
 PROJECTION: MGA Zone 54
 DATE: 8th March 2017
 SOFTWARE: ESRI ArcGIS v10.4
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
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**Eden Valley
 Wine Region**



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Eden Valley

Vintage overview

VINTAGE REPORT

The 2017 vintage in the Barossa (Barossa and Eden Valleys) finally wrapped-up a month or more later than in recent years, with some stand-out wines showing a lot of promise and an overall yield 20-30% above a low five-year average.

In stark contrast to the previous year, the 2016 growing season was one of the wettest on record. Annual (2016) rainfall was 750mm, over 150% of the long term average; winter was 143%, spring 198% and December 135% of average. The resulting wet soils, combined with a cooler than average spring and early summer meant the vines grew slowly but healthily.

As the grapes went through veraison in January and February 2017, Barossa experienced generally average temperatures and only two short bursts of high temperatures. Two well-timed rain events in late January and early February kept vines healthy and in no rush to ripen, with the rest of February remaining dry.

March saw the beginning of an Indian summer, which lasted until late April. This was perfect for consistent ripening of grapes, with good colour development and natural acidity. The average minimum and maximum temperatures for March were 2 to 3°C above average, followed by a notable shift to much cooler nights from late March onwards, which extended vintage for many into May.

The 2017 vintage promises to deliver an exciting array of wine styles, from “bright, aromatic wines”, through to “vibrant, intense, well-structured” and “dense, concentrated” wines from Barossa’s many diverse sites. Eden Valley Shiraz is showing heightened spice aromatics and fine tannins. Eden Valley Riesling is predicted to be a stand-out, rivalling the great Riesling vintages of 2002 and 2005.

Nicki Robins, Barossa Grape & Wine Association

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Eden Valley in 2017 was 11,975 tonnes, up almost 2,000 tonnes on the 2016 harvest (9,991 tonnes).

The five year average crush for Eden Valley is 9,577 tonnes, making the 2017 harvest 25% above the average and the highest since 2011.

The estimated value of fruit from the region was \$21 million, compared with \$17 million last year, reflecting the increased tonnes crushed and an increase in the region’s average purchase price. There were mixed results in the average purchase price for the major varieties. There were increases for Shiraz (up 1% to \$2,375 per tonne) and Chardonnay (up 9% to \$1,203 per tonne). On the other hand, prices declined for Riesling (down 3% to \$1,573 per tonne) and Cabernet Sauvignon (down 13% to \$2,049 per tonne).

The price dispersion data shows that 21% of red tonnages were purchased at between \$1500 and \$2000, and 59% were purchased at over \$2000, and in the whites, 26% were purchased between \$1500 and \$2000 and 7% at above \$2000.

There were 38 hectares of new plantings in Eden Valley in 2016, almost all Shiraz (26 hectares) and Cabernet Sauvignon (11 hectares).

Eden Valley

Winegrape intake summary table - red

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Franc	21									2	8%	23	\$45,380
Cabernet Sauvignon	632			12%	30%	58%	\$1,294,100	\$2,049	-13%	851	57%	1483	\$3,038,110
Grenache	13			19%	20%	61%	\$27,321	\$2,107	-8%	10	44%	23	\$48,517
Lagrein	6											6	\$6,040
Mataro/Mourvedre										52	100%	52	\$112,384
Merlot	147			28%	72%		\$196,373	\$1,339	-8%	84	36%	231	\$309,086
Montepulciano										15	100%	15	\$33,281
Muscat a Petit Grains Rouge/Rose	1											1	\$1,320
Petit Verdot										55	100%	55	\$117,779
Pinot Meunier										2	100%	2	\$4,317
Pinot Noir	180			89%	11%		\$219,438	\$1,220	-12%	113	39%	293	\$357,282
Roussanne	49									15	23%	63	\$85,617
Shiraz	1977	0%		13%	16%	70%	\$4,694,122	\$2,375	1%	1634	45%	3611	\$8,574,614
Tempranillo	25			100%			\$30,312	\$1,200	-8%	28	53%	53	\$64,020
Other red	7									7	51%	14	\$42,720
Total red	3057	0%		20%	21%	59%	\$6,597,643	\$2,158	0%	2868	48%	5925	\$12,840,467

Eden Valley

Winegrape intake summary table - white

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
White													
Chardonnay	754				76%	24%	\$906,740	\$1,203	9%	628	45%	1382	\$1,662,571
Gewurztraminer	75				100%		\$82,728	\$1,106	3%	20	21%	95	\$104,765
Muscat a Petit Grains Blanc	20				99%	1%	\$18,333	\$936	1%	19	50%	39	\$36,304
Pinot Gris/Grigio	180				100%		\$233,299	\$1,297	2%	252	58%	432	\$560,473
Riesling	1347	0%			49%	37%	\$2,118,801	\$1,573	-3%	1736	56%	3083	\$4,851,002
Sauvignon Blanc	148				100%		\$146,424	\$992	-5%	226	61%	374	\$370,951
Semillon	227			14%	86%		\$171,314	\$755	-2%	43	16%	269	\$203,517
Viognier	148				34%	61%	\$247,538	\$1,674	10%	130	47%	278	\$465,054
Other white	27									72	73%	98	\$132,827
Total white	2924	0%	1%	66%	26%	7%	\$3,961,410	\$1,355	4%	3126	52%	6050	\$8,387,462
Total all varieties	5980	0%	1%	43%	24%	33%	\$10,559,053	\$1,766	3%	5995	50%	11975	\$21,227,929

Eden Valley

Current plantings by variety and year planted

	Current area in hectares					% planted in 2016
Variety	Pre-2014	2014	2015	2016	Total area	2016
Red winegrapes						
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	307	17	2	11	337	3%
Grenache	20	0	0	0	20	0%
Mataro (Mourvedre)	10	5	0	0	16	0%
Merlot	68	0	0	0	68	0%
Meunier (Pinot Meunier)	2	0	0	0	2	0%
Other Red	8	1	0	0	9	5%
Petit Verdot	7	0	0	0	7	0%
Pinot Noir	59	0	1	0	60	0%
Sangiovese	2	0	0	0	2	0%
Shiraz	713	24	1	26	764	3%
Tempranillo	9	0	0	0	9	0%
Total red varieties	1,209	47	4	38	1,299	3%
White winegrapes						
Chardonnay	255	2	7	0	264	0%
Muscat A Petit Grains Blanc (White Frontignac)	7	0	0	0	7	0%
Other White	11	2	1	0	14	4%
Pinot Gris	36	0	0	0	36	0%
Riesling	544	5	8	0	557	0%
Roussanne	5	0	0	0	5	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)	19	1	0	0	19	0%
Viognier	42	0	0	0	42	0%
Total white varieties	1,008	10	16	0	1,034	0%
Unknown variety	14	0	0	0	14	0%
Total all varieties	2,231	57	20	38	2,346	2%

Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

Fleurieu Zone – other

Wine Australia July 2017



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Southern Fleurieu, Kangaroo Island
Wine Regions and Fleurieu other



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Fleurieu zone - other

Vintage overview

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 942 hectares.

OVERVIEW OF VINTAGE STATISTICS

The harvest from the Fleurieu zone - other region was 3,141 tonnes in 2017, slightly up on the 3,083 tonnes crushed in 2016.

Over the past five years, the average crush for this region is 3,105 tonnes implying that the 2017 yields were very close to average. The minimum crush over the period was 2,831 tonnes in 2013 and the highest was the 2015 crush of 3,603 tonnes.

The total estimated value of grapes from these regions was stable at \$2.8 million but the average purchase value across all fruit increased by 2% to \$866 per tonne. The average purchase price for Shiraz decreased by 17% to \$892 per tonne and Cabernet Sauvignon by 23% to \$1,075 per tonne. On the other hand, Chardonnay was relatively flat at \$618 per tonne and Sauvignon Blanc increased by 16% to \$781 per tonne and Pinot Gris/Grigio by 16% to \$952 per tonne.

The price dispersion data shows that 89% of red tonnages and 73% 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 table

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purchase value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Franc											3	100%	\$4,292
Cabernet Sauvignon	251	0%			91%	2%	7%	\$270,335	\$1,075	-23%	125	33%	\$395,623
Grenache											2	100%	\$3,291
Merlot	91			31%	69%			\$63,364	\$697	-3%	7	8%	\$68,449
Nero d'Avola	4												\$5,880
Pinot Noir	46			49%			51%	\$103,792	\$2,258		9	16%	\$133,978
Sangiovese											6	100%	\$8,584
Shiraz	1014	1%			95%	1%	3%	\$904,345	\$892	-17%	93	8%	\$1,005,097
Tempranillo	1												\$1,229
Red total	1407	1%	4%	89%	1%	5%	\$1,348,944	\$959	-15%	245	15%	1652	\$1,626,423
White													
Chardonnay	348	18%	25%	57%				\$214,924	\$618	0%	55	14%	\$248,811
Pinot Gris/Grigio	254				94%	6%		\$241,974	\$952	16%	108	30%	\$346,022
Sauvignon Blanc	310			2%	95%	3%		\$241,843	\$781	16%	295	49%	\$465,522
Semillon	85			100%				\$31,980	\$375	7%	24	22%	\$52,782
Viognier											8	100%	\$6,055
Other white	2												\$4,476
White total	999	6%	18%	73%	2%	0%	\$735,197	\$736	8%	490	33%	1489	\$1,123,669
Grand total	2406	3	3%	10%	83%	2%3%	\$2,084,141	\$866	2%	735	23%	3141	\$2,750,092

Fleurieu zone - other

Current plantings by variety and year planted

Southern Fleurieu

Current area in hectares

Variety	Pre-2014	2014	2015	2016	Total area	% planted in 2016
Cabernet Sauvignon	70	0	0	0	70	0%
Merlot	36	0	0	0	36	0%
Other Red	6	0	0	0	6	0%
Pinot Noir	30	0	0	0	30	0%
Shiraz	124	0	0	0	124	0%
Chardonnay	89	0	0	0	89	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	491	0	0	0	491	0%

Source: Vinehealth Australia

Fleurieu zone - other

Current plantings by variety and year planted

Current area in hectares

Kangaroo Island	Variety	Current area in hectares				% planted in	
		Pre-2014	2014	2015	2016	Total area	2016
	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	48	0	0	0	48	0%
	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	134	0	0	0	134	0%

Fleurieu zone (other)

Current area in hectares

Variety	Current area in hectares				% planted	
	Pre-2014	2014	2015	2016	Total area	in 2016
Cabernet Sauvignon	37	0	0	0	37	0%
Other Red	21	1	0	0	21	0%
Shiraz	128	0	0	0	128	0%
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	36	0	0	0	36	0%
Total all varieties	316	1	0	0	317	0%

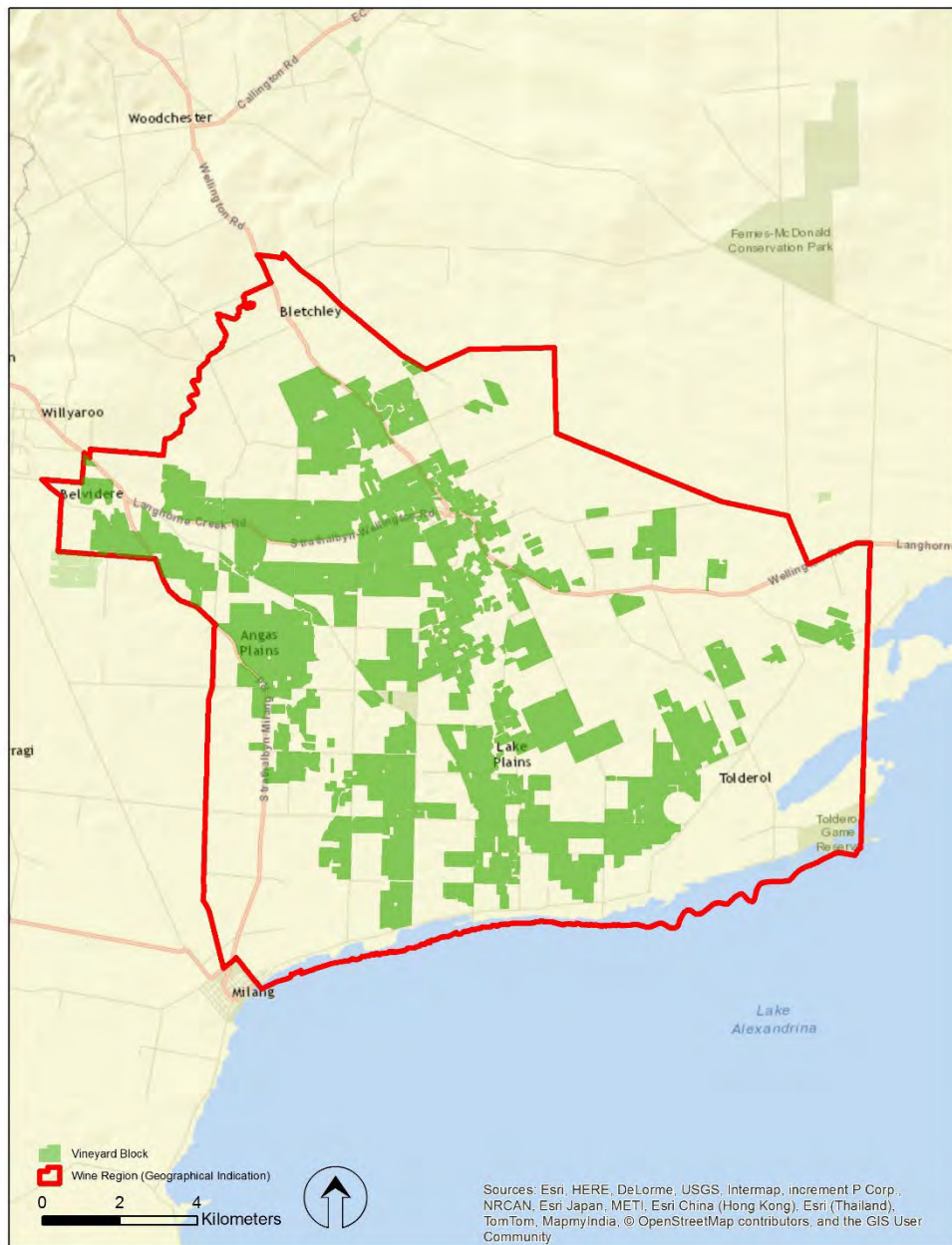
Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

Langhorne Creek Wine Region

Wine Australia July 2017



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 3rd August 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

**Langhorne Creek
Wine Region**

 **Vinehealth**
AUSTRALIA

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Langhorne Creek

Vintage overview

VINTAGE REPORT

The Langhorne Creek wine region experienced a long, slow vintage in 2017, beginning with high winter and spring rainfall leading into an extended, cool ripening phase.

Reminiscent of long-past vintages, the grape harvest for 2017 kicked off a good two weeks later than the previous year in Langhorne Creek, with fruit for sparkling base reaching wineries in mid-February. Whites followed in the last week of February, with reds not hitting their stride until late March (near on a month later). The final harvesters did not retire until the first week of May.

The season was set with excellent soil moisture profiles from the early rains. Moisture throughout spring called for tight disease management. A late December flood kept growers alert on the oldest parts of the central flood plain of the region. Consequently fruit was not taken from some of these areas. Counter to this, the majority of the region revelled in the long slow and moderate ripening conditions and also the relatively civilised timing afforded to harvesting and winery logistics by the more relaxed pace of vintage. It has been noted as a vintage where 'sub-regional variation' has driven quality above variety.

The high spring rainfall resulted in improved nutrient levels in vines which translated to healthy ferments with moderate alcohol levels and natural acidity. Yields across most of the region have been average to slightly above average, with lower yields on the heavier soils.

Word is that Cabernet Sauvignon, Shiraz, Malbec and Petit Verdot are showing excellent quality in the wineries and whites have been a highlight with fantastic flavour development at lower baumes, thanks to the long, cool ripening period. Verdelho, Fiano and Vermentino have been described as exceptional with 'punchy varietal notes'.

Lian Jaensch, Langhorne Creek Wine

OVERVIEW OF VINTAGE STATISTICS

The harvest from the Langhorne Creek region in 2017 was 59,141 tonnes, slightly down on the 2016 harvest of 60,119 tonnes.

Over the past five years, the average crush for Langhorne Creek has been 50,750 tonnes. This year's vintage was 17% above the average and the second highest since 2008. The lowest in the past five years was 23,480 tonnes in 2014.

The value of fruit from the region was estimated to be nearly \$46 million, the same as 2016 with an increase in average purchase prices offsetting the lower crush. There were mixed results in the weighted average purchase price for the major two red varieties. Shiraz increased 3% to \$882 per tonne while Cabernet Sauvignon decreased by 3% to \$754 per tonne. The major white, Chardonnay, saw an increase of 2% to \$522 per tonne.

The price dispersion data shows that 91% of red tonnages were purchased at between \$600 and \$1500, while for the whites, 47% were purchased between \$600 and \$1500 and 49% between \$300 and \$600.

There were 22 hectares of new plantings in Langhorne Creek in the 2016, compared with 21 hectares the previous year. Half the new plantings were Shiraz.

Langhorne Creek

Winegrape intake summary table - red

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Franc	5									4	43%	9	\$5,400
Cabernet Sauvignon	10961	6%	9%	85%	0%	0%	\$8,260,680	\$754	-3%	7994	42%	18956	\$14,285,348
Dolcetto	4									5	55%	10	\$11,424
Durif										152	100%	152	\$122,908
Grenache	103			100%			\$68,887	\$667	5%	887	90%	991	\$660,852
Lagrein	11											11	\$11,160
Malbec	730	0%		100%			\$689,188	\$944	-1%	129	15%	859	\$811,307
Mataro/Mourvedre	15											15	\$9,955
Merlot	2812	0%	8%	92%			\$1,961,923	\$698	6%	2374	46%	5185	\$3,617,960
Montepulciano										13	100%	13	\$10,486
Petit Verdot	5			100%			\$2,769	\$600	0%	72	94%	77	\$46,221
Pinot Noir	784		10%	90%			\$568,236	\$725	3%	728	48%	1512	\$1,096,284
Sangiovese										25	100%	25	\$19,858
Shiraz	11530	2%	1%	96%	0%	1%	\$10,171,060	\$882	3%	11052	49%	22582	\$19,920,814
Other red	14											14	\$21,593
Total red	26974	3%	5%	91%	0%	1%	\$21,773,647	\$807	0%	23436	46%	50410	\$40,651,569

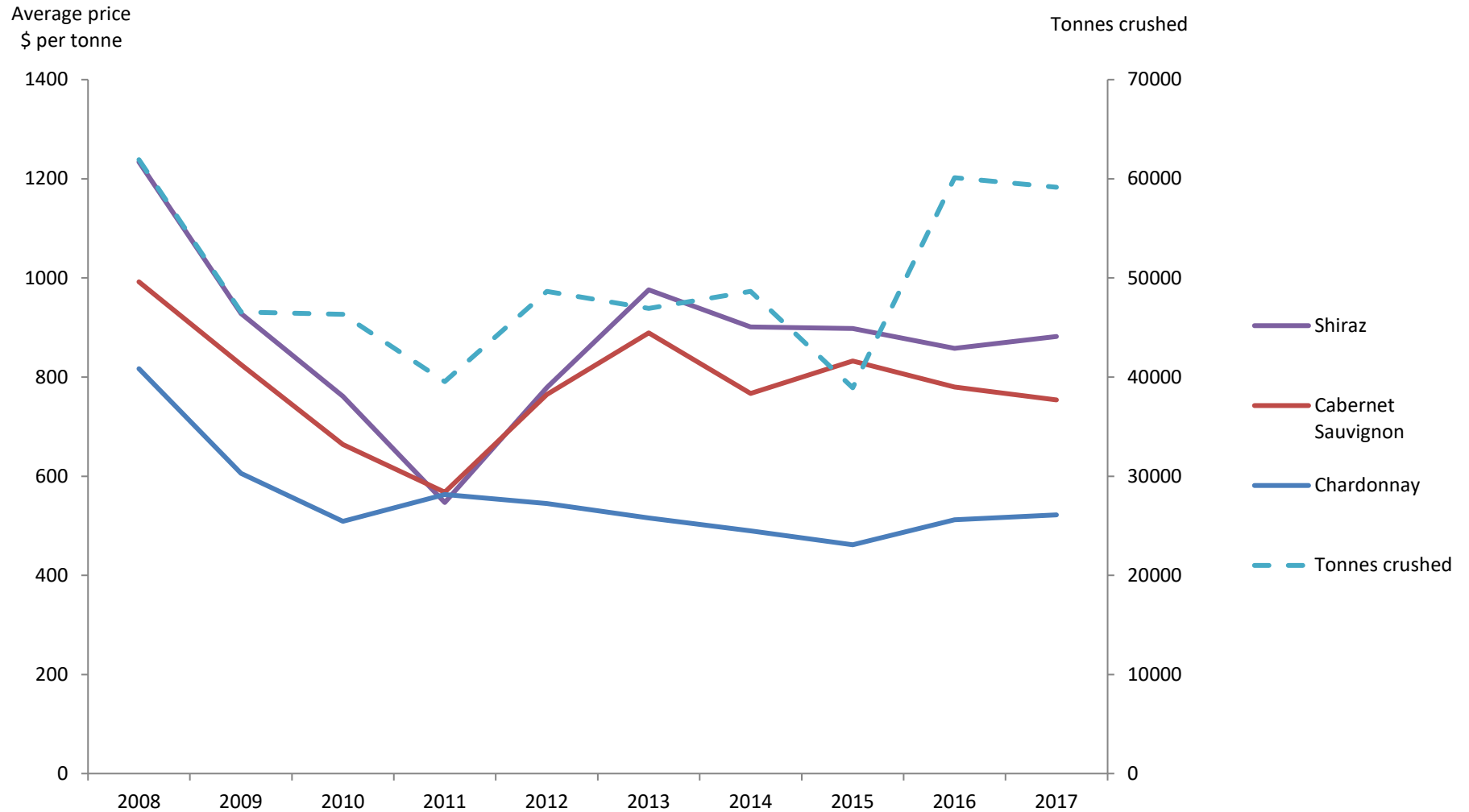
Langhorne Creek

Winegrape intake summary table - white

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
White													
Chardonnay	2973		6%	68%	26%		\$1,551,188	\$522	2%	1028	26%	4001	\$2,087,636
Chenin blanc										15	100%	15	\$9,164
Fiano	7									11	59%	18	\$27,270
Gewurztraminer										299	100%	299	\$182,912
Muscat a Petit Grains Blanc										24	100%	24	\$14,479
Pinot Gris/Grigio	530				100%		\$515,714	\$973	4%	121	19%	651	\$633,004
Riesling	135									2004	94%	2139	\$1,283,418
Sauvignon Blanc	947			27%	73%		\$642,611	\$679	-7%	574	38%	1521	\$1,032,420
Semillon										2	100%	2	\$1,222
Verdelho										25	100%	25	\$15,124
Vermentino										9	100%	9	\$5,193
Viognier										25	100%	25	\$15,029
Other white	4											4	\$6,125
Total white	4595	4%	49%	47%	0%		\$2,807,480	\$611	4%	4136	47%	8732	\$5,312,995
Total all varieties	31569	3%	12%	84%	0%	0%	\$24,581,127	\$779	2%	27572	47%	59141	\$45,964,564

Langhorne Creek

Historical weighted average price vs tonnes crushed



Langhorne Creek

Current plantings by variety and year planted

	Current area in hectares					% planted in
Variety	Pre-2014	2014	2015	2016	Total area	2016
Red winegrapes						
Cabernet Franc	8	0	0	0	8	0%
Cabernet Sauvignon	1,863	29	2	2	1,897	0%
Dolcetto	11	0	0	0	11	0%
Grenache	78	0	0	0	78	0%
Lagrein	10	0	0	0	10	0%
Malbec	64	28	3	0	95	0%
Merlot	371	0	0	0	371	0%
Nebbiolo	8	0	0	0	8	0%
Other Red	133	9	5	5	152	3%
Petit Verdot	13	0	0	0	13	0%
Sangiovese	30	0	0	0	30	0%
Shiraz	2,183	15	5	11	2,214	0%
Total red varieties	4,773	81	16	18	4,888	0%
White winegrapes						
Chardonnay	540	0	0	0	540	0%
Other White	18	0	0	0	18	0%
Pinot Gris	39	0	5	4	48	8%
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	899	0	5	4	907	0%
Rootstock Block	6	0	0	0	6	0%
Unknown variety	50	0	0	0	50	0%
Total all varieties	5,728	81	21	22	5,852	0%

Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

Limestone Coast Zone – other

Wine Australia July 2017



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

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



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Limestone Coast zone - other

Vintage overview

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

Vintage report

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

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

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

Anna Hooper, Cape Jaffa Wines

OVERVIEW OF VINTAGE STATISTICS

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

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

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

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

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

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

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Limestone Coast zone - other

Winegrape intake summary table

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

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

Limestone Coast zone - other

Current plantings by variety and year planted

Mount Benson

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

Mount Gambier

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

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

Robe

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

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

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

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

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

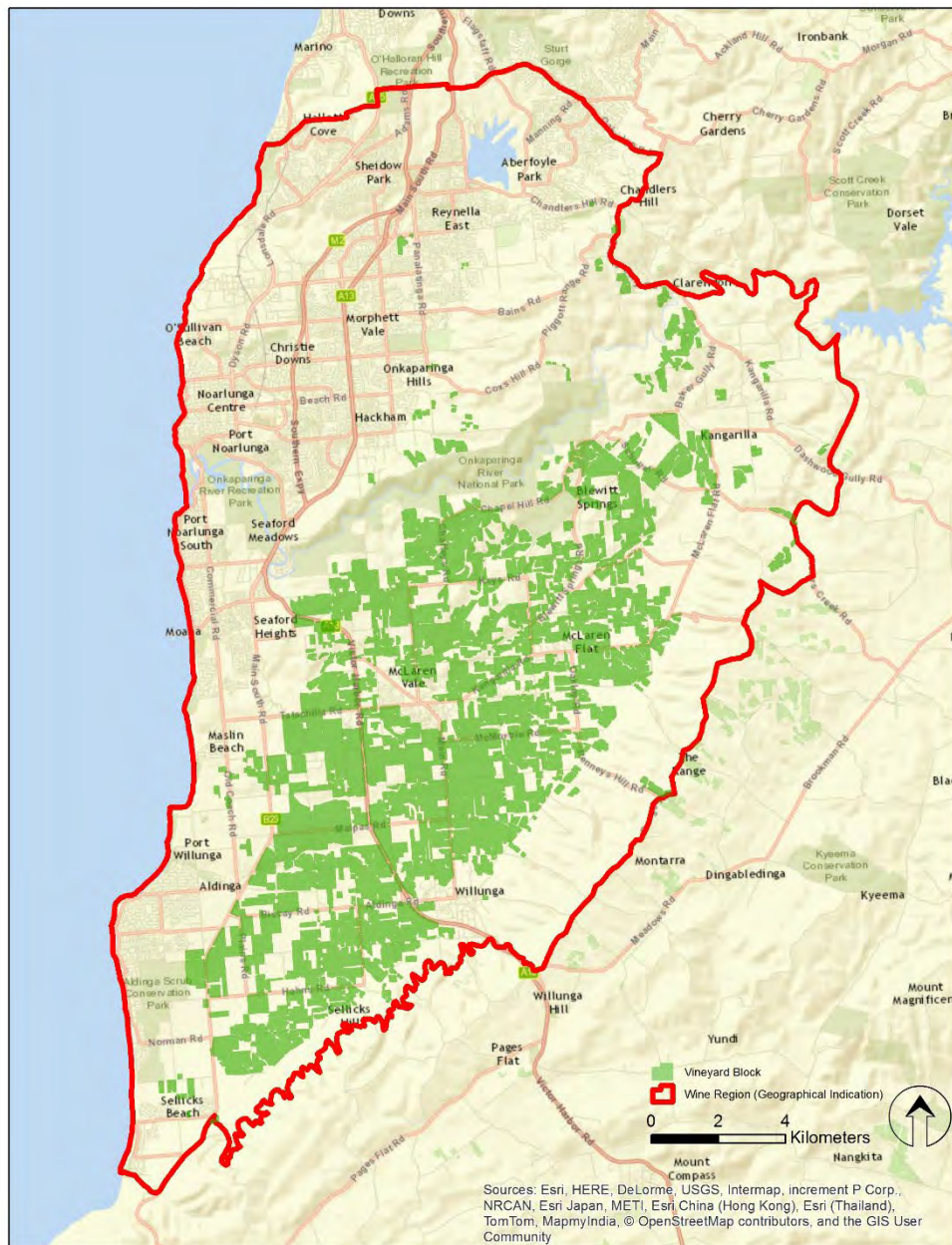
Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

McLaren Vale Wine Region

Wine Australia July 2017



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8 March 2017
SOFTWARE: Esri ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

McLaren Vale Wine Region



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McLaren Vale

Vintage overview

VINTAGE REPORT

Vintage 2017 in the McLaren Vale Wine Region was judged highly successful for both grape growers, who had above average crops with minimal faults, and winemakers who had the ability to pick fruit as they required during an extended dry autumn.

Winter weather conditions help set up the early growth of our vineyards with above average rainfall leading to full soil profiles.

Spring was also significantly wetter than average. There were notable large storms and high winds with frequent low-pressure fronts moving through the region. Fortunately, the weather patterns during flowering were relatively stable and dry. Spring air temperatures were cooler than average and flowering was delayed by 14-21 days compared to recent seasons, while veraison was also delayed.

Harvest began later than in 2016, with very few vineyards picked in February, with picking continuing into late April.

There was one significant rain event of approximately 25mm in the first week of February. Fortunately, this did not cause widespread berry splitting and Botrytis levels remained low in the aftermath. Weather conditions during March were stable, with little natural rainfall, although there were some morning dews.

Autumn continued to be warm and dry through early April allowing almost all vineyards to be successfully harvested.

The earlier picked red vineyards, including Shiraz and Tempranillo, have been described as having good fruit characters; winemaking reports are they are lively, bright, spicy, vibrant, and elegant. Towards the end of vintage, parcels of Grenache and Cabernet Sauvignon and Mourvèdre were described as excellent examples of these grape styles.

James Hook, McLaren Vale Grape, Wine and Tourism Association

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from McLaren Vale was 44,287 tonnes in 2017, compared to 40,997 tonnes in 2016.

Over the past five years, the average crush has been 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 \$71 million, up from \$66 million, reflecting the increased tonnage. There were mixed results in the average price paid for the major varieties. The average price of Shiraz declined by 3% to \$1,743 per tonne while Cabernet Sauvignon increased by 3% to \$1574 per tonne, and Chardonnay by 3% to \$709 per tonne.

The price dispersion data shows that 66% of red fruit was purchased at over \$1500, compared with 65% in 2016 and 45% in 2015. For the whites, 80% was purchased between \$600 and \$1500 and only 8% at above \$1500.

There were 67 hectares of new plantings in McLaren Vale in spring 2016, compared with 66 hectares in 2015. 88% were red varieties, with just under half being Shiraz.

NB It is estimated that the total crush for McLaren Vale is close to 60,000 tonnes, based on planted area, average yields and levy returns supplied to Primary Industries and Regions SA.

McLaren Vale

Winegrape intake summary table - red

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Barbera	20			70%		30%	\$24,978	\$1,276	-19%	11	35%	30	\$38,476
Cabernet Franc	54			66%	9%	25%	\$88,331	\$1,634	37%	5	9%	59	\$96,818
Cabernet Sauvignon	4167			39%	50%	11%	\$6,560,657	\$1,574	3%	3969	49%	8136	\$12,809,604
Durif										17	100%	17	\$28,126
Grenache	1040		0%	35%	49%	16%	\$1,664,351	\$1,601	-1%	1240	54%	2280	\$3,650,223
Malbec	12			100%			\$16,470	\$1,326	3%	15	55%	27	\$36,211
Mataro/Mourvedre	312			40%	37%	23%	\$464,411	\$1,490	-10%	251	45%	563	\$838,297
Merlot	826		18%	72%	11%		\$689,933	\$835	-14%	552	40%	1378	\$1,151,097
Montepulciano	5			42%		58%	\$9,520	\$1,983	13%	4	48%	9	\$18,425
Muscat a Petit Grains Rouge/Rose										0	100%	0	\$463
Nero d'Avola	28				76%	24%	\$52,720	\$1,894	10%	30	52%	57	\$108,868
Petit Verdot	156		63%	29%		8%	\$112,142	\$721	-25%	156	50%	312	\$224,719
Pinot Noir	314			100%			\$257,453	\$820	-2%	21	6%	335	\$274,547
Roussanne										77	100%	77	\$127,376
Sangiovese	89			46%	54%		\$135,912	\$1,532	3%	179	67%	268	\$409,863
Shiraz	16670		0%	28%	46%	26%	\$29,063,914	\$1,743	-3%	10295	38%	26965	\$47,012,264
Tempranillo	187			10%	66%	24%	\$333,681	\$1,788	2%	161	46%	347	\$621,477
Other red	109			15%	32%	53%	\$211,327	\$1,941	5%	207	66%	316	\$613,682
Total red	23987		1%	33%	44%	22%	\$39,685,799	\$1,654	-2%	17190	42%	41177	\$68,060,535

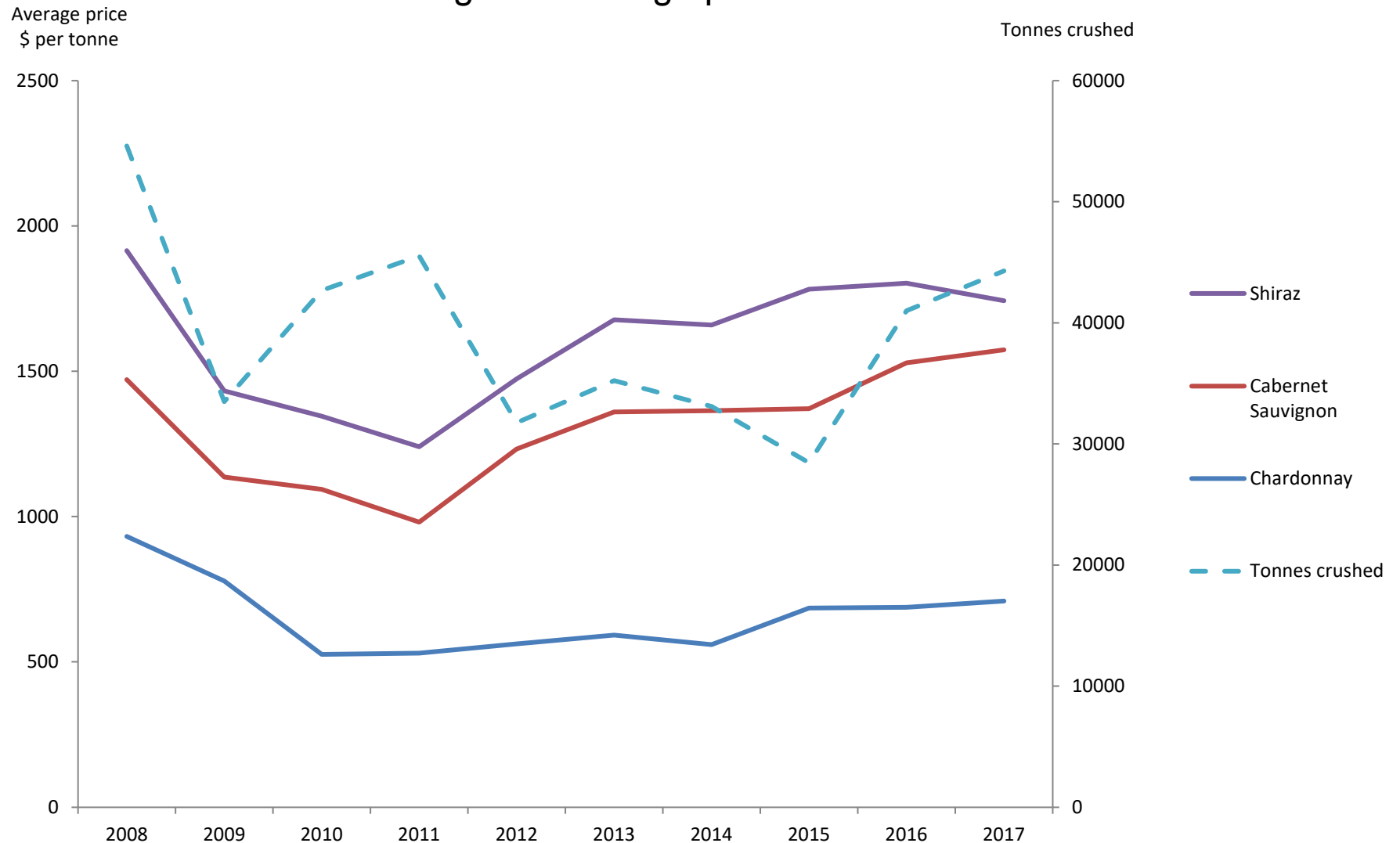
McLaren Vale

Winegrape intake summary table - white

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
White													
Chardonnay	1191		19%	79%	2%		\$844,715	\$709	3%	427	26%	1619	\$1,147,479
Chenin blanc	9									6	40%	16	\$15,859
Fiano	22				100%		\$38,736	\$1,784	13%	7	25%	29	\$51,387
Gewurztraminer	1											1	\$957
Marsanne										39	100%	39	\$33,640
Moscato Giallo										11	100%	11	\$9,577
Muscat a Petit Grains Blanc	64			49%	51%		\$77,702	\$1,217	-9%	5	7%	68	\$83,229
Pinot Gris/Grigio	7			100%			\$6,800	\$1,000	64%	163	96%	170	\$170,120
Riesling	157			100%			\$184,016	\$1,169	7%	18	10%	176	\$205,590
Sauvignon Blanc	182			100%			\$143,321	\$788	8%	108	37%	290	\$228,767
Semillon	26			94%		6%	\$23,678	\$909	38%	113	81%	140	\$126,871
Verdelho	64			80%	20%		\$92,080	\$1,450	6%	125	66%	188	\$273,179
Vermentino	57			3%	97%		\$90,706	\$1,605	7%	7	10%	63	\$101,302
Viognier	139			93%	7%		\$153,782	\$1,104	-1%	84	38%	224	\$246,927
Other white	23			100%			\$24,220	\$1,076	-6%	54	71%	77	\$82,541
Total white	1941		12%	80%	8%	0%	\$1,690,172	\$871	7%	1168	38%	3110	\$2,777,424
Total all varieties	25928		2%	37%	42%	20%	\$41,375,972	\$1,596	0%	18359	41%	44287	\$70,837,959

McLaren Vale

Historical weighted average price vs tonnes crushed



McLaren Vale

Current plantings by variety and year planted

Variety	Current area in hectares					% planted in 2016
	Pre-2014	2014	2015	2016 Total area		
Red winegrapes						
Barbera	11	0	0	0	11	0%
Cabernet Franc	26	0	1	0	27	0%
Cabernet Sauvignon	1,259	25	15	12	1,311	1%
Grenache	440	2	4	6	452	1%
Mataro (Mourvedre)	77	6	2	4	89	4%
Merlot	219	0	0	1	220	0%
Other Red	89	8	5	8	110	7%
Petit Verdot	48	0	0	0	48	0%
Pinot Noir	52	0	0	0	52	0%
Sangiovese	44	0	0	0	44	0%
Shiraz	3,858	88	38	28	4,012	1%
Tempranillo	59	0	1	0	60	0%
Total red varieties	6,180	130	66	59	6,435	1%
White winegrapes						
Chardonnay	370	0	0	2	372	0%
Chenin Blanc	17	0	0	0	17	0%
Marsanne	11	0	0	0	11	0%
Muscat A Petit Grains Blanc (White Frontignac)	11	0	0	0	12	1%
Other White	32	0	0	6	39	17%
Pinot Gris	20	0	0	0	20	0%
Riesling	32	0	0	0	32	0%
Sauvignon Blanc	62	0	0	0	62	0%
Savagnin	3	0	0	0	3	0%
Semillon	34	0	0	0	34	0%
Verdelho	14	0	0	0	15	0%
Vermentino	8	0	0	0	8	0%
Viognier	52	0	0	0	52	0%
Total white varieties	667	1	0	8	676	1%
Rootstock Block	4	0	0	0	4	0%
Multi-purpose white	3	0	0	0	3	1%
Unknown variety	199	0	0	0	199	0%
Total all varieties	7,053	131	66	67	7,317	1%

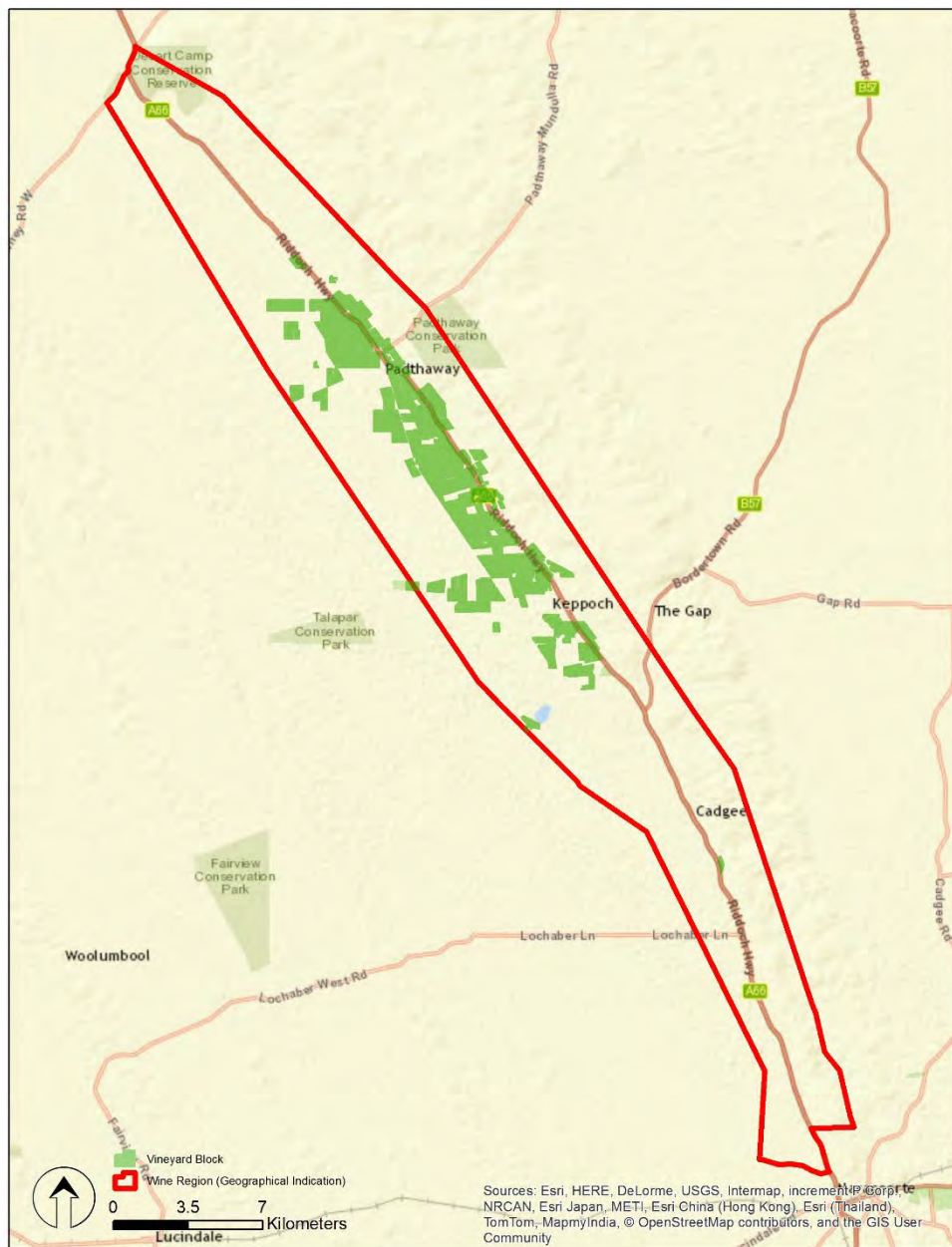
Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

Padthaway Wine Region

Wine Australia July 2017



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Padthaway Wine Region



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Padthaway

Vintage overview

VINTAGE REPORT

The 2017 season started very well with a full soil moisture profile after receiving above average winter and spring rainfall. These conditions have not been seen in this area for many years. With local creeks and drains flowing for an extended period of time we are already witnessing the benefits of the natural recharge of the aquifer, which can only be a positive for the Padthaway region. During the growing season from September to April Padthaway received 459 mm of rain compared to 138 mm in Vintage 16 - this was 89% above the long term average.

The Padthaway summer was relatively mild compared to previous vintages with only two days of recorded temperatures above 40 degrees.

Bud-burst was very similar in timing to the previous year; however there were only 283 Growing Degree Days in 2016 compared to 507 for 2015. This may explain why flowering was considerably later this season.

The increased rainfall during the growing season meant growers had to apply additional preventative sprays compared to the drier and warmer conditions in Vintage 16.

The milder conditions during vintage slowed the ripening process; the harvesting of white varieties commenced at the end of February and continued through to the beginning of May for Cabernet Sauvignon.

Yields were average to above average and cooler conditions and rainfall events during vintage prolonged the harvest, putting pressure on growers.

Due to the varying weather conditions, some fruit was left on the vines; however the large majority was harvested with Chardonnay looking strong with natural acids and flavours along with solid parcels of Shiraz and Cabernet fruit coming from the earlier picks.

Andrew Bryson, President, Padthaway Grape Growers' Association

OVERVIEW OF VINTAGE STATISTICS

The harvest from the Padthaway region in 2017 was 41,142 tonnes down from 44,922 tonnes in 2016.

The five year average crush for Padthaway is 33,868 tonnes, making the 2017 harvest 21% above the average. The maximum crush in the past five years was 44,922 tonnes in 2016 and the smallest was 25,351 tonnes in 2015.

The total estimated value of grapes was down from \$38 million to \$36 million, reflecting the lower crush. There were mixed price results for the region's three major varieties. Shiraz declined by 4% to \$1,042 per tonne and Cabernet Sauvignon fell by 3% to \$1,032 per tonne. On the other hand, Chardonnay increased by 14% to \$602 per tonne.

The price dispersion data shows that 94% of red tonnages were purchased at between \$600 and \$1500 per tonne, while for the whites, 84% of purchases were also in the same price range.

There were 4 hectares of new plantings in Padthaway in 2016, with 3 hectares being Sauvignon Blanc. The total area planted in the region decreased by 140 hectares to 3849 ha, with most of the losses being Chardonnay.

Padthaway

Winegrape intake summary table

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Franc	72											72	\$45,332
Cabernet Sauvignon	5799	0%	2%	97%		1%	\$5,982,546	\$1,032	-3%	1827	24%	7627	\$7,867,338
Malbec	125									509	80%	634	\$633,960
Merlot	1240		22%	78%			\$844,455	\$681	14%	627	34%	1867	\$1,271,814
Pinot Noir	1023			100%			\$813,937	\$796	-4%	247	19%	1270	\$1,010,794
Shiraz	7998		3%	94%	2%	1%	\$8,335,482	\$1,042	-4%	4272	35%	12269	\$12,787,546
Tempranillo	25											25	\$51,534
Other red										6	100%	6	\$6,009
Total red	16281	0%	4%	94%	1%	1%	\$16,197,936	\$995	-2%	7489	32%	23770	\$23,674,327
White													
Chardonnay	8523		42%	58%			\$5,129,883	\$602	14%	2549	23%	11071	\$6,663,884
Gewurztraminer	179									218	55%	398	\$274,503
Pinot Gris/Grigio	1983			100%			\$1,943,142	\$980	-2%	326	14%	2308	\$2,262,285
Riesling	322		12%	88%			\$293,735	\$913	-2%	1259	80%	1581	\$1,443,118
Sauvignon Blanc	1382		4%	96%			\$1,036,737	\$750	-5%	199	13%	1582	\$1,186,313
Verdelho										261	100%	261	\$179,746
Viognier	72			100%			\$72,430	\$1,000	0%	45	38%	117	\$116,960
Other white	43									11	21%	54	\$13,575
Total white	12504	0%	29%	70%			\$8,610,517	\$689	4%	4868	28%	17372	\$12,140,383
Total all varieties	28785	0%	15%	84%	0%	1%	\$24,808,453	\$862	1%	12356	30%	41142	\$35,814,710

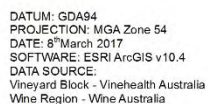
Padthaway

Current plantings by variety and year planted

Variety	Current area in hectares				% planted in	
	Pre-2014	2014	2015	2016	Total area	2016
Red winegrapes						
Cabernet Franc	12	0	0	0	12	0%
Cabernet Sauvignon	876	51	4	0	931	0%
Malbec	78	0	0	0	78	0%
Merlot	179	0	0	0	179	0%
Other Red	8	0	0	2	9	17%
Pinot Noir	110	0	0	0	110	0%
Shiraz	1,179	0	12	0	1,191	0%
Total red varieties	2,441	51	15	2	2,509	0%
White winegrapes						
Chardonnay	879	0	0	0	879	0%
Other White	11	0	0	0	11	0%
Pinot Gris	151	0	0	0	151	0%
Riesling	148	0	0	0	148	0%
Sauvignon Blanc	80	0	0	3	83	3%
Semillon	10	0	0	0	10	0%
Traminer (Gewurztraminer)	21	0	0	0	21	0%
Verdelho	19	0	0	0	19	0%
Viognier	19	0	0	0	19	0%
Total white varieties	1,338	0	0	3	1,340	0%
Total all varieties	3,779	51	15	4	3,849	0%

Source: Vinehealth Australia

Wine Australia July 2017



Vinehealth
AUSTRALIA

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Riverland

Vintage overview

VINTAGE REPORT

Vintage 2017 witnessed another solid contribution from growers and wineries across the region with total tonnage likely to exceed the 456K tonnes of 2016 despite the hailstorm in November, which is estimated to have resulted in crop losses of 20K-30K tonnes.

Early disease concerns failed to materialise and rejection rates were very low. Unusually heavy February rains, followed closely by an intense three-day heatwave proved challenging and impacted markedly on baumé trends, particularly for Shiraz. Many assessors reported seed and skin ripeness well ahead of baumé. This gave rise to indecision and disappointment for many and also hampered scheduling for some.

Alternative and organic winegrowers reported a successful year with no disease, good yields and wines offering early signs of outstanding wine outcomes.

Feedback from Riverland wineries suggest:

- A full 4 week vintage slippage due to the relatively cool growing period
- Merlot – an excellent year
- Chardonnay, Sauvignon Blanc and Cabernet Sauvignon – very good wine outcomes
- Shiraz – a good result despite baumé levels being uniformly and significantly hindered by the February wet / heat phenomenon

Chris Byrne, Riverland Wine

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from the Riverland in 2017 was 470,123 tonnes, up on the 456,988 tonnes reported in 2016.

The five-year average crush (2013-2017) for the Riverland is 442,774 tonnes. The actual crush has increased each year since 2010 and was higher again this year than last year, which eclipsed the 2004 crush when the state total was the highest on record.

The total estimated value of all grapes increased from \$114 million to \$162 million, reflecting an increase in the overall average price paid as well as the increased tonnes.

The average prices for most major varieties increased. For whites, Chardonnay increased by 6% to \$310 per tonne, Sauvignon Blanc by 10% to \$380 and Pinot Gris by 5% to \$503 per tonne. In the reds, Shiraz increased by 18% to \$396 per tonne, Cabernet Sauvignon increased 13% to \$391 per tonne and Merlot by 9% to \$390 per tonne.

The price dispersion data shows that 97% of red tonnages were purchased at between \$300 and \$600 per tonne and only 3% at below \$300 per tonne, compared with 20% in 2015. For the whites, 65% were purchased at between \$300 and \$600 and 35% below \$300 per tonne.

There were 127 hectares of new plantings in 2016, compared with 144 hectares the previous year. Shiraz (57 hectares) and Pinot Gris/Grigio (42 hectares) were the main contributors to the increase in new plantings. There was a net reduction in total vineyard area in the Riverland of nearly 300 hectares.

Riverland

Winegrape intake summary table - red

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Barbera	19											19	\$6,460
Cabernet Franc	6											6	\$1,650
Cabernet Sauvignon	50921		100%	0%			\$19,907,028	\$391	13%	15852	24%	66773	\$26,104,183
Dolcetto	4											4	\$1,183
Durif	331		98%	2%			\$164,025	\$495	24%	178	35%	509	\$252,159
Grenache	5502	43%	56%	0%			\$1,835,594	\$334	19%	1195	18%	6697	\$2,234,218
Lagrein	29	31%		58%		11%	\$25,957	\$906	78%			29	\$25,957
Malbec	278									219	44%	497	\$146,639
Mataro/Mourvedre	2371	43%	57%	0%			\$837,673	\$353	13%	203	8%	2574	\$909,288
Merlot	18630	0%	100%				\$7,269,946	\$390	9%	8449	31%	27079	\$10,567,002
Montepulciano	122		56%	41%		3%	\$76,700	\$628	-6%	53	30%	175	\$110,210
Muscat a Petit Grains Rouge/Rose	144											144	\$61,935
Petit Verdot	6840	1%	98%	1%			\$2,424,877	\$355	5%	4839	41%	11680	\$4,140,487
Pinot Noir	7402		100%				\$2,842,173	\$384	6%	996	12%	8397	\$3,224,487
Roussanne	9											9	\$2,452
Ruby Cabernet	973		100%				\$340,892	\$350	16%	781	45%	1754	\$614,574
Sangiovese	98	25%	75%				\$36,019	\$366	83%	334	77%	432	\$158,399
Shiraz	91880	1%	98%	1%			\$36,424,766	\$396	18%	24621	21%	116501	\$46,185,537
Tarrango	247											247	\$59,800
Tempranillo	568		98%	0%		1%	\$242,908	\$428	23%	217	28%	785	\$335,785
Other red	1217	3%	94%	2%		0%	\$565,383	\$465	0%	904	43%	2121	\$985,429
Total red	187591	3%	97%	0%		0%	\$73,209,538	\$390	14%	58841	24%	246431	\$96,127,832

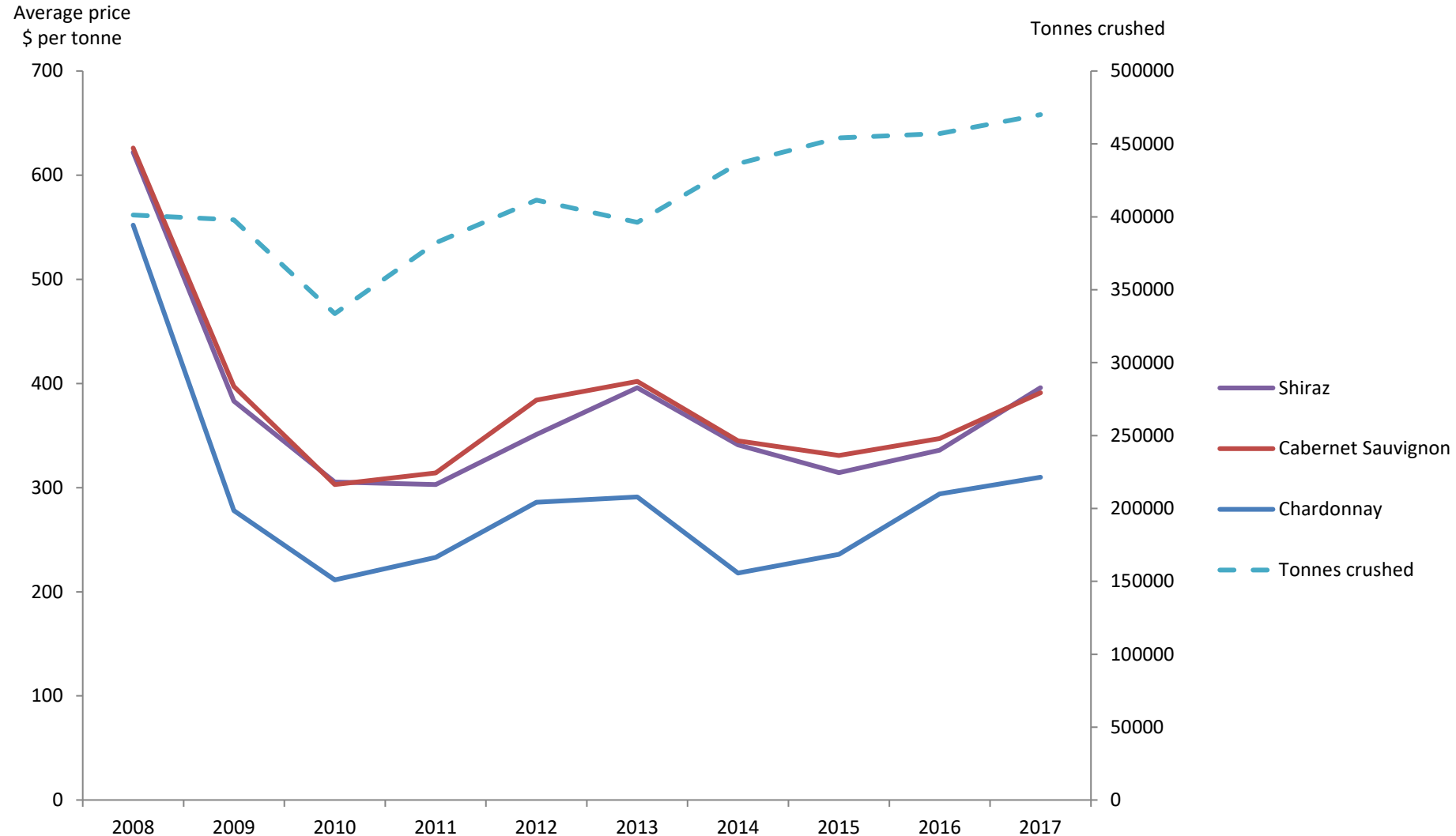
Riverland

Winegrape intake summary table - white

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
White													
Canada Muscat	35									55	61%	90	\$45,045
Chardonnay	96701	5%	95%	0%			\$30,017,063	\$310	6%	19654	17%	116355	\$36,117,824
Chenin blanc	1740	100%					\$393,142	\$226	10%			1740	\$393,142
Colombard	24899	100%					\$5,527,408	\$222	9%	4016	14%	28915	\$6,418,996
Doradillo	38									95	71%	133	\$29,033
Fiano	186		83%	16%	2%		\$100,821	\$541	28%			186	\$100,821
Gewurztraminer	992		100%				\$373,503	\$377	-18%	1633	62%	2625	\$988,522
Moscato Giallo	56											56	\$14,045
Muscadelle (Tokay)										33	100%	33	\$9,610
Muscat a Petit Grains Blanc	4074	3%	97%				\$1,259,277	\$309	3%	808	17%	4882	\$1,508,868
Muscat Gordo Blanco	24913	98%	2%				\$5,771,935	\$232	10%	4605	16%	29518	\$6,838,843
Pinot Gris/Grigio	1995		100%				\$1,004,381	\$503	5%	665	25%	2661	\$1,339,335
Riesling	1900	6%	94%				\$607,485	\$320	-2%	619	25%	2519	\$805,263
Sauvignon Blanc	14267	1%	99%				\$5,424,181	\$380	10%	4974	26%	19241	\$7,315,336
Semillon	4787	90%	10%				\$1,287,573	\$269	7%	4968	51%	9755	\$2,623,766
Sultana	132	100%					\$28,189	\$214	-1%			132	\$28,189
Verdelho	1397	57%	42%	2%			\$479,604	\$343	-10%	41	3%	1438	\$493,564
Vermentino	534	10%	87%	3%			\$220,616	\$413	2%	323	38%	856	\$353,965
Viognier	1313	28%	60%	12%			\$480,149	\$366	-5%	424	24%	1737	\$635,153
Other white	605	97%	2%	2%			\$146,767	\$243	5%	216	26%	821	\$199,212
Total white	180564	35%	65%	0%	0%		\$53,162,015	\$294	5%	43127	19%	223691	\$66,258,531
Total all varieties	368155	18%	81%	0%	0%	0%	\$126,371,553	\$343	11%	101968	22%	470123	\$162,386,363

Riverland

Historical weighted average price vs tonnes crushed



Riverland

Current plantings by variety and year planted – white winegrapes

Variety	Current area in hectares				% planted in	
	Pre-2014	2014	2015	2016	Total area	2016
White winegrapes						
Biancone (White Grenache)	7	0	0	0	7	0%
Chardonnay	4,458	2	0	2	4,462	0%
Chenin Blanc	85	0	0	0	85	0%
Colombard	786	0	1	0	787	0%
Doradillo	36	0	0	0	36	0%
Muscadelle (Tokay)	8	0	0	0	8	0%
Muscat A Petit Grains Blanc (White Frontignac)	127	0	0	0	127	0%
Muscat Gordo Blanco	998	4	3	0	1,006	0%
Other White	50	1	3	1	55	2%
Palomino	7	0	0	0	8	0%
Pinot Gris	73	7	6	42	127	33%
Riesling	180	4	0	0	184	0%
Sauvignon Blanc	517	0	0	16	532	3%
Semillon	342	0	0	0	342	0%
Sultana	148	0	0	0	149	0%
Traminer (Gewurztraminer)	113	0	0	0	113	0%
Trebbiano	15	0	0	0	15	0%
Verdelho	93	0	0	0	93	0%
Vermentino	19	2	0	0	21	0%
Viognier	120	0	0	0	120	0%
Total white varieties	8,182	19	13	62	8,276	1%

Source: Vinehealth Australia

Riverland

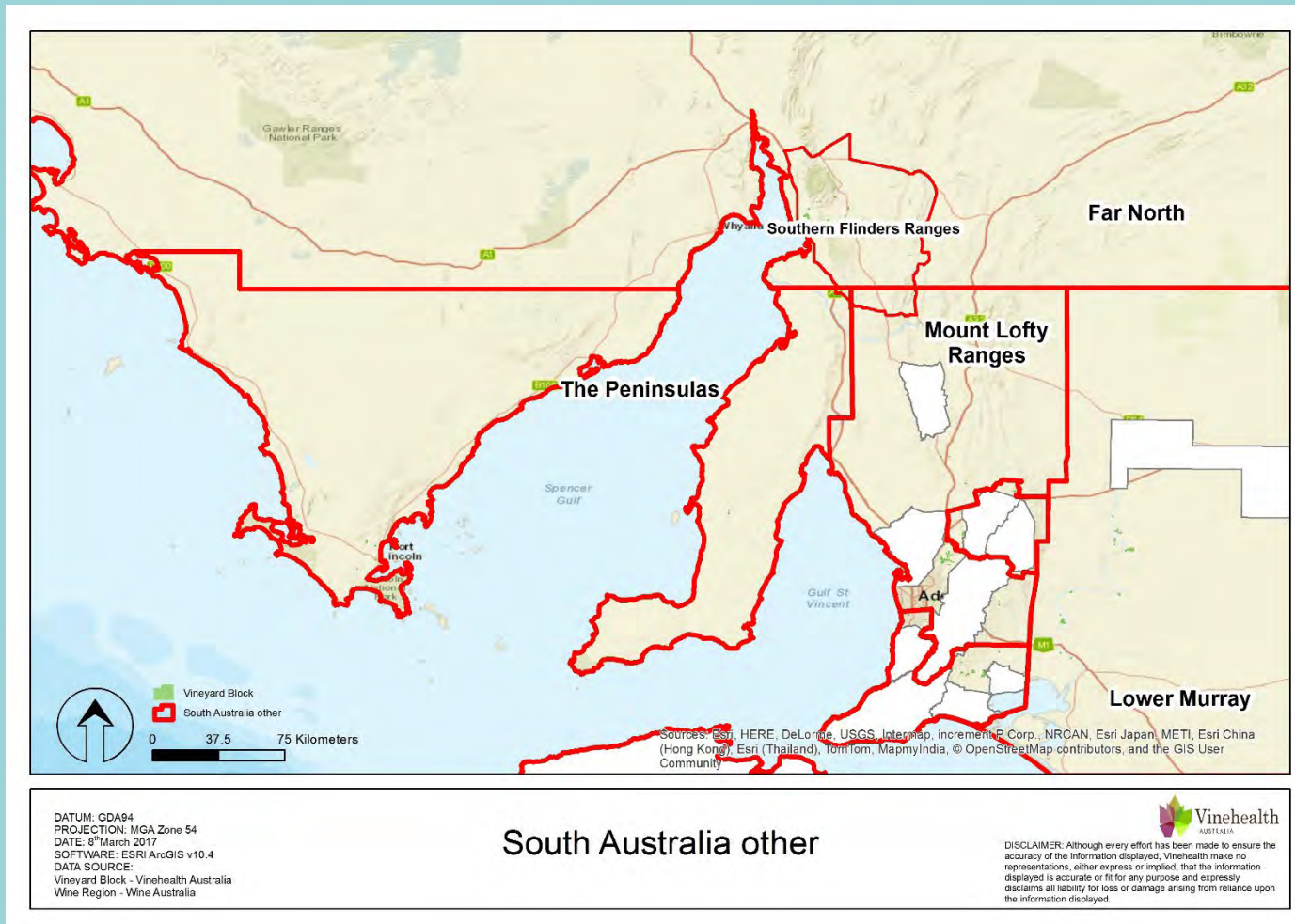
Current plantings by variety and year planted – white winegrapes

Variety	Current area in hectares				Total area	% planted in 2016
	Pre-2014	2014	2015	2016		
Red winegrapes						
Cabernet Sauvignon	3,174	26	28	3	3,231	0%
Grenache	342	0	0	0	343	0%
Malbec	23	0	0	0	23	0%
Mataro (Mourvedre)	242	0	0	0	242	0%
Merlot	1,179	3	9	4	1,195	0%
Other Red	80	3	8	1	91	2%
Petit Verdot	498	2	0	0	499	0%
Pinot Noir	298	0	0	0	298	0%
Rubired	38	0	0	0	38	0%
Ruby Cabernet	118	0	0	0	118	0%
Sangiovese	14	0	0	0	14	0%
Shiraz	5,317	44	65	57	5,483	1%
Tarrango	4	0	0	0	4	0%
Tempranillo	46	6	2	0	54	0%
Total red varieties	11,373	84	112	65	11,634	1%
Unknown variety	257	0	0	0	257	0%
Rootstock Block	25	0	0	0	25	0%
Table grapes - red	27	1	1	0	29	0%
Table grapes - white	11	0	16	0	27	0%
Multi-purpose red	62	0	0	0	63	0%
Multi-purpose white	26	0	2	0	28	0%
Total all varieties	19,963	105	144	127	20,339	1%

Source: Vinehealth Australia

SA Winegrape Crush Survey Regional Summary Report 2017

South Australia - other



SA - other

Vintage overview

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.

OVERVIEW OF VINTAGE STATISTICS

The harvest from South Australia (other) in 2017 was 6,975 tonnes, compared with 4,709 tonnes in 2016.

The five-year average crush for this group of regions is 4,372 tonnes, implying that 2017 yields were significantly up on average. The smallest vintage in the past five years was 2,942 tonnes recorded in 2013 while the largest was the 2017 crush. However, note that with small regions, changes in response rate and possible mis-classification of fruit locations

The total value of fruit from these vineyards is estimated at \$5 million. The average purchase price for Shiraz and Chardonnay increased but declined marginally for Cabernet Sauvignon.

The price dispersion data shows that 49% of red tonnages were purchased at between \$600 and \$1500 per tonne and 43% above \$1500 per tonne. For the whites, all the fruit was sold at below \$600 per tonne, with 24% at less than \$300 per tonne.

SA - other

Winegrape intake summary table

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Sauvignon	1196		54%	41%		5%	\$890,093	\$744	0%	65	5%	1261	\$980,018
Grenache	58									7	11%	65	\$30,719
Mataro/Mourvedre	18											18	\$27,510
Merlot	305		87%	13%			\$141,330	\$463	-24%	2	1%	307	\$143,650
Montepulciano	4											4	\$8,000
Petit Verdot	107											107	\$46,858
Ruby Cabernet	34											34	\$12,413
Sangiovese	48									10	17%	58	\$43,230
Shiraz	2945		34%	57%	6%	2%	\$2,953,377	\$1,003	17%	536	15%	3482	\$3,571,501
Tempranillo	5											5	\$3,885
Other red	19											19	\$14,190
Red total	4740	0%	44%	49%	43%	0%	\$4,155,310	\$877	9%	619	12%	5360	\$4,881,975
White													
Chardonnay	1059	9%	91%				\$323,648	\$306	8%	1	0%	1060	\$324,721
Colombard	76											76	\$16,370
Muscat Gordo Blanco	179											179	\$44,845
Pinot Gris/Grigio	84											84	\$45,088
Riesling										5	100%	5	\$4,598
Sauvignon Blanc	140		100%				\$58,666	\$420	22%	7	5%	147	\$65,102
Semillon	44											44	\$12,004
Vermentino	16											16	\$5,635
Viognier	2									2	48%	4	\$4,383
White total	1601	24%	75%	0%	0%	0%	\$508,955	\$318	4%	15	1%	1616	\$522,745
Grand total	6341	52%	37%	3%	2%	0%	\$4,664,265	\$736	8%	634	9%	6975	\$5,404,720

SA - other

Current plantings by variety and year planted

Southern Flinders Ranges

Variety	Current area in hectares				% planted	
	Pre-2014	2014	2015	2016 Total area	in 2016	
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 all varieties	165	0	0	0	165	0%

The Peninsulas

Variety	Current area in hectares				% planted in	
	Pre-2014	2014	2015	2016 Total area	2016	
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%

Source: Vinehealth Australia

SA - other

Current plantings by variety and year planted

Lower Murray zone - other

Variety	Current area in hectares				% planted	
	Pre-2014	2014	2015	2016	Total area	in 2016
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	131	0	3	0	135	0%
Total red varieties	257	0	3	0	261	0%
White winegrapes						
Chardonnay	85	0	0	0	85	0%
Colombard	16	0	0	0	16	0%
Other White	27	1	0	0	28	0%
Riesling	12	0	0	0	12	0%
Sauvignon Blanc	12	0	0	0	12	0%
Total white varieties	152	1	0	0	153	0%
Unknown variety	14	0	0	0	14	0%
Total all varieties	424	1	3	0	428	0%

Source: Vinehealth Australia

SA - other

Current plantings by variety and year planted

Mount Lofty Ranges zone - other

Variety	Current area in hectares				Total area	% planted in 2016
	Pre-2014	2014	2015	2016		
Red winegrapes						
Cabernet Sauvignon	74	0	0	0	74	0%
Merlot	6	0	0	0	6	0%
Other Red	23	0	0	0	23	0%
Petit Verdot	6	0	0	0	6	0%
Sangiovese	12	0	0	0	12	0%
Shiraz	186	1	0	0	187	0%
Total red varieties	307	1	0	0	308	0%
White winegrapes						
Chardonnay	4	0	0	0	4	0%
Other White	8	0	0	0	8	0%
Riesling	5	0	0	0	5	0%
Semillon	1	0	0	0	1	0%
Total white varieties	19	0	0	0	19	0%
Germplasm	4	0	0	0	4	0%
Unknown variety	4	0	0	0	4	0%
Total all varieties	333	1	0	0	334	0%

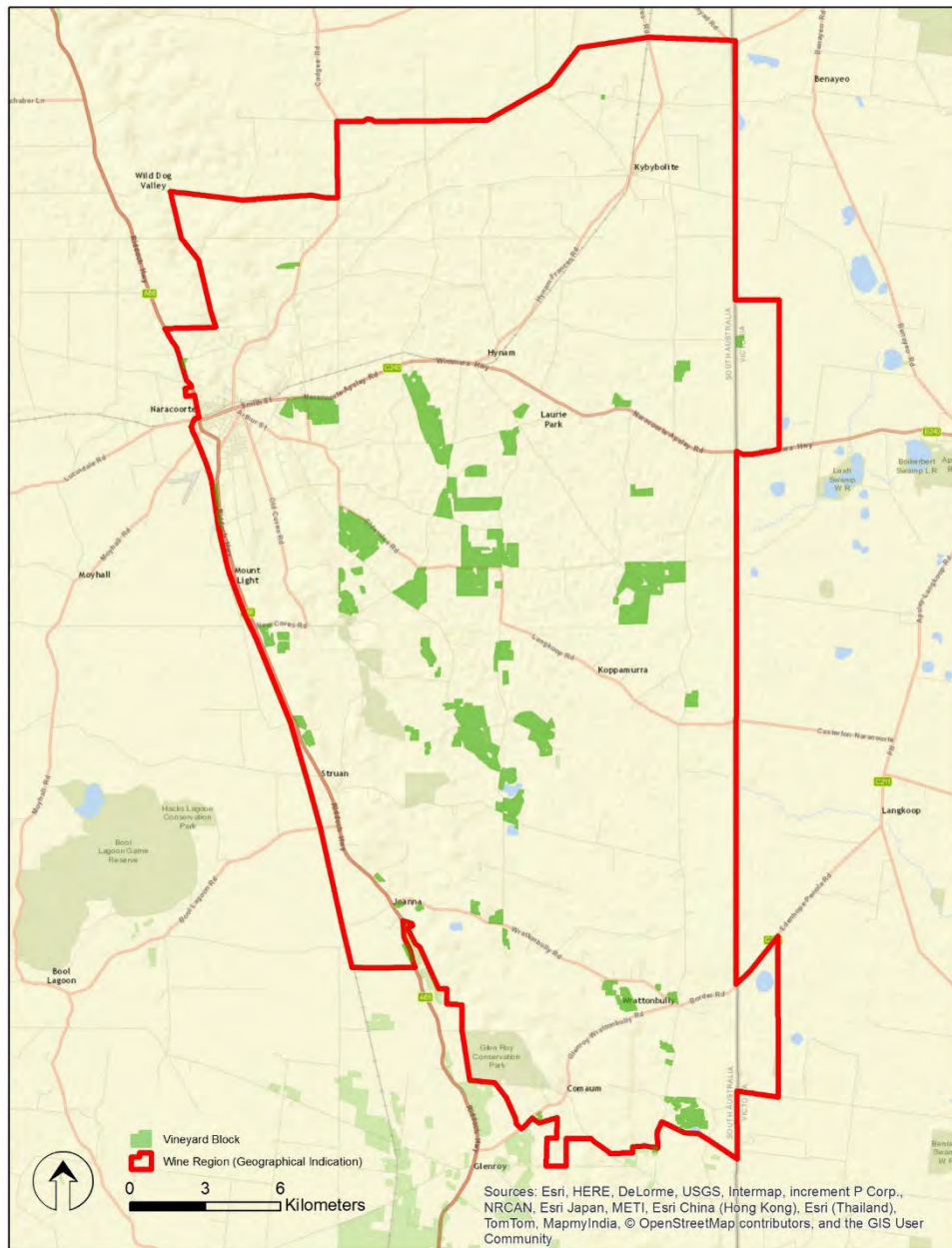
Source: Vinehealth Australia

SA Winegrape Crush Survey

Regional Summary Report 2017

Wrattonbully Wine Region

Wine Australia July 2017



**Wrattonbully
Wine Region**



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Wrattonbully

Vintage overview

VINTAGE REPORT

The 2017 vintage will be remembered as a long and hard season, and brought back some memories of the 2011 vintage.

Coming out of winter was looking like the best start to the season we have had in years; creeks had been constantly flowing, soil moisture levels were high and plenty of ground water recharge had occurred. Bud burst occurred on par with the past couple of seasons and was relatively even, and with high moisture levels there were no significant frost events. Early growth of the vines was excellent with ample soil moisture to fuel good even and balanced growth.

Spring was one of the wettest on record, with constant nearly weekly rainfall events making disease control very difficult. Adding to this was the milder temperatures which fuelled higher vigour in the vines than the past couple of drier seasons. The cooler and wetter conditions of spring led to a late and extended flowering period, leading to quite a bit of variability in bunch ripeness going into Harvest.

Drier conditions returned in February and March which allowed for good even ripening of the fruit, with flavours, tannins and baumes developing well especially in Cabernet Sauvignon, which benefited from the absence of any significant heatwaves.

Harvesting of whites commenced in late February, a few weeks later than the past two seasons, but more in line with long term average. With favourable weather conditions, harvest continued into mid-March with the whites showing strong varietal characters, and high crisp natural acidity.

The bulk of the red harvest didn't start until April and this coincided with the return to wet and cold conditions making harvest very intermittent and drawn out.

The early harvested fruit is expressing the strong varietal characters that were seen on the vines, but the cooler wetter conditions made it more difficult to concentrate flavours in the later picked fruit. Despite the tough season the hard work and effort put in by the growers in the district has again paid dividends with very strong and varietal red wines being produced again this season, with Cabernet Sauvignon being the standout.

Tim Fletcher – Chairperson, Wrattonbully Wine Region Association

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Wrattonbully was 27,374 tonnes in 2017 compared with 23,606 tonnes in 2016.

The five-year average crush for Wrattonbully is 20,918 tonnes. The 2017 crush was the highest in the five year period and 31% 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 \$23 million to \$28.5 million due mainly to the increased tonnes crushed. There were also increases in prices paid for most reds: Shiraz increased by 2% to \$1,088 per tonne, Merlot by 14% to \$927 and Pinot Noir by 12% to \$849. Chardonnay also increased – up 4% to \$664, but Cabernet Sauvignon decreased by 5% to \$1,234 per tonne and Pinot Gris/Grigio by 9% to \$902 per tonne.

The price dispersion data shows that 84% of red tonnages were purchased at between \$600 and \$1500 and 13% at above \$1500, while for the whites, 77% was purchased between \$600 and \$1500 and 23% below \$600.

There were 11 hectares of new plantings in Wrattonbully in 2016, similar to the two previous years. Almost all was in red varieties.

Wrattonbully

Winegrape intake summary table

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Franc										2	100%	2	\$2,403
Cabernet Sauvignon	3938		3%	84%	10%	3%	\$4,859,959	\$1,234	-5%	6480	62%	10418	\$12,855,994
Malbec	40											40	\$39,214
Merlot	790			83%	17%		\$732,073	\$927	14%	2617	77%	3407	\$3,157,771
Petit Verdot	3											3	\$3,684
Pinot Noir	465			100%			\$394,892	\$849	12%	416	47%	881	\$748,322
Sangiovese										77	100%	77	\$87,278
Shiraz	2393		6%	79%	16%		\$2,603,578	\$1,088	2%	4576	66%	6969	\$7,581,614
Tempranillo	58									9	14%	68	\$94,710
Total red	7688		3%	84%	11%	2%	\$8,715,049	\$1,134	-1%	14177	65%	21865	\$24,570,991
White													
Chardonnay	1007	7%	12%	80%			\$668,795	\$664	4%	1188	54%	2195	\$1,457,402
Gewurztraminer	7											7	\$5,754
Pinot Gris/Grigio	383		14%	86%			\$345,691	\$902	-9%	1215	76%	1598	\$1,442,123
Prosecco	92											92	\$46,095
Riesling	20			100%			\$13,260	\$650	8%	85	81%	105	\$68,348
Sauvignon Blanc	507		24%	76%			\$310,948	\$614	0%	904	64%	1410	\$865,441
Semillon										68	100%	68	\$47,042
Viognier										33	100%	33	\$22,562
Total white	2017	4%	19%	77%			\$1,390,542	\$690	-1%	3492	63%	5509	\$3,954,767
Total all varieties	9704	1%	7%	82%	9%	1%	\$10,105,591	\$1,041	0%	17669	65%	27374	\$28,525,758

Wrattenbully

Current plantings by variety and year planted

Variety	Pre-2014	2014	2015	2016	Total area	% planted in 2016
Red winegrapes						
Cabernet Sauvignon	1,200	0	11	2	1,212	0%
Malbec	5	2	0	2	8	19%
Merlot	281	0	0	2	283	1%
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	680	10	0	4	694	1%
Tempranillo	9	0	0	0	9	0%
Total red varieties	2,251	12	11	9	2,283	0%
White winegrapes						
Chardonnay	193	0	0	0	193	0%
Pinot Gris	98	0	0	2	99	2%
Prosecco	5	0	0	0	5	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	59	0	0	0	59	0%
Semillon	5	0	0	0	5	0%
Viognier	6	0	0	0	6	0%
Total white varieties	372	0	0	2	374	1%
Unknown variety	22	0	0	0	22	0%
Total all varieties	2,645	12	11	11	2,679	0%

Source: Vinehealth Australia

Explanations and definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from Wine Australia.

Total crush

The total crushed is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 88%; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region

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

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May 2017).

The calculated average purchase value per tonne is the average amount paid per tonne of fruit across all wineries.

Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements.

Important note on average purchase value

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts. It should also be noted that in minor varieties there may sometimes be very few purchases contributing towards a calculated average purchase value.

Price dispersion data (shaded columns in Intake Summary tables)

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

Estimated total value of all grapes

The estimated total value of all grapes is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

Explanations and definitions cont.d

PLANTING DATA

Source of planting data tables

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

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

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

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

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2017 and include all plantings from the 2016 planting season.
2. Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the 2017 report compared with previous reports.
3. Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight variations between tables.

AUSTRALIAN WINE SECTOR SURVEY

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

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

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

Disclaimer

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