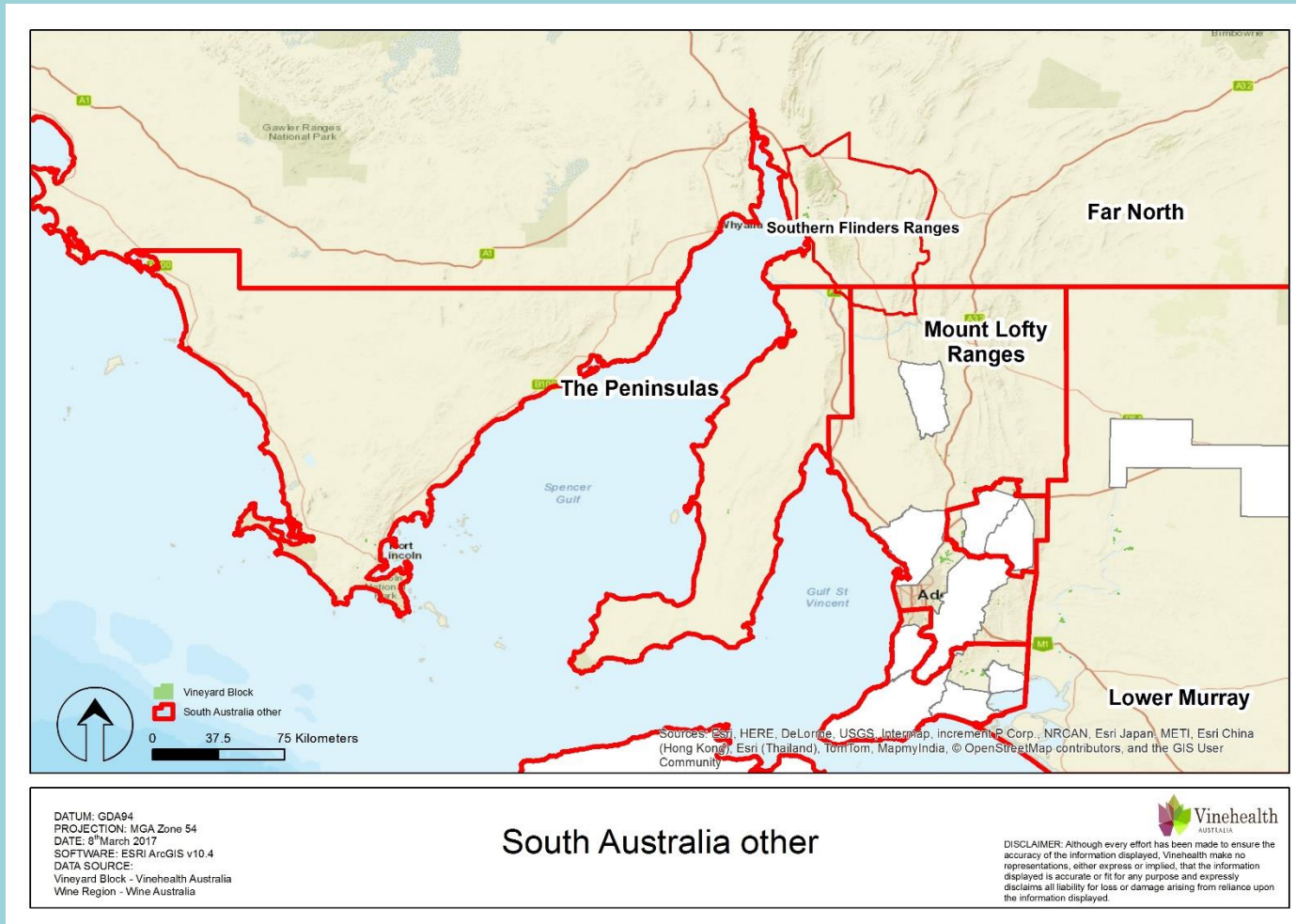


SA Winegrape Crush Survey Regional Summary Report 2017

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 998 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.

There were no new plantings in these regions in 2015-16 and the total area decreased by 19 hectares to 998 hectares.

SA - other

Winegrape intake summary table

Variety	E Tonnes purchased	D (less than \$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				2016 Total area	% planted in 2016
	Pre-2014	2014	2015	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				2016 Total area	% planted in 2016
	Pre-2014	2014	2015	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				2016 Total area	% planted in 2016
	Pre-2014	2014	2015	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

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

This information has been made available to assist on the understanding that Wine Australia is not rendering professional advice. Wine Australia does not accept responsibility for the results of any actions taken on the basis of the information contained in this report, nor for the accuracy, currency or completeness of any material contained in it. Wine Australia expressly disclaims all and any liability and responsibility to any person in respect of consequences of anything done in respect of reliance, whether wholly or in part, upon this report.

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