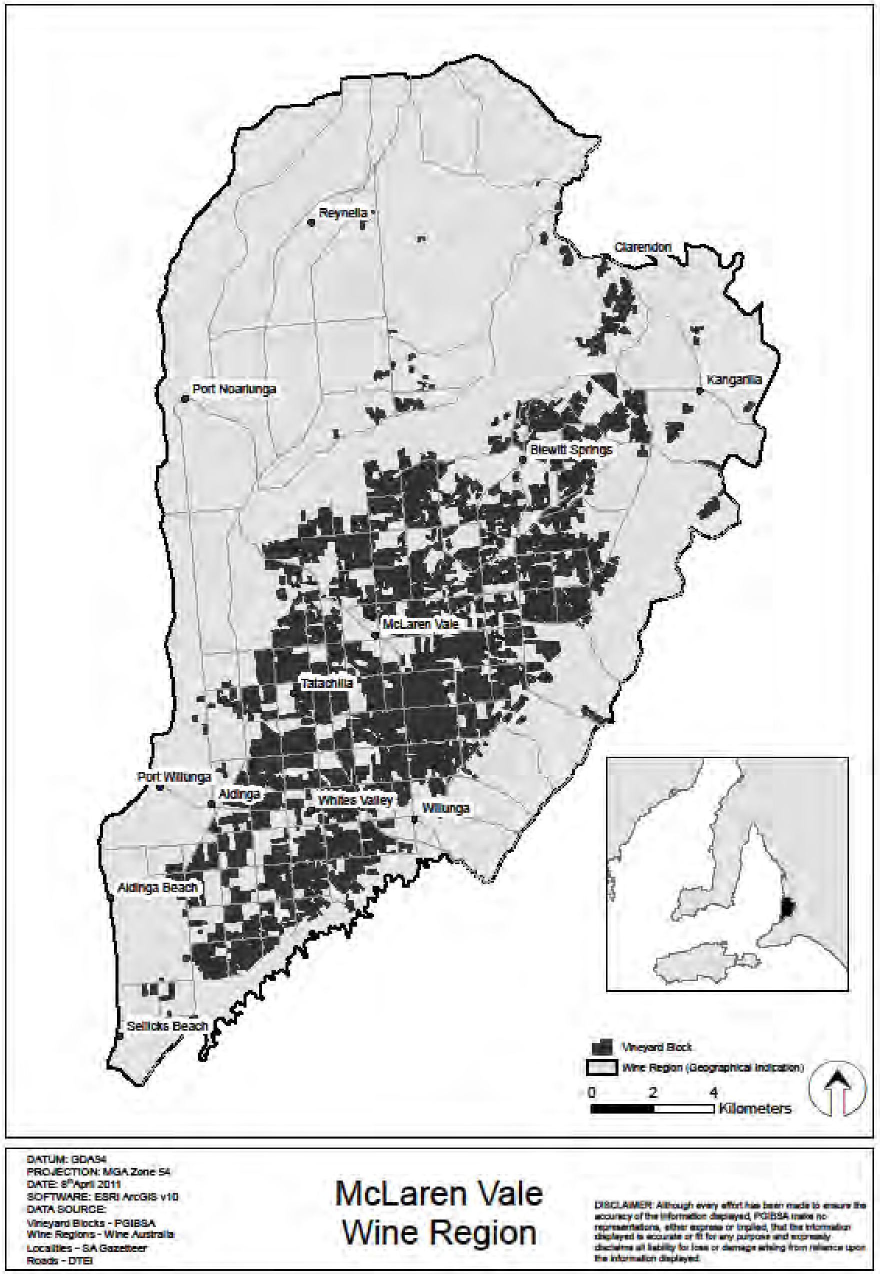



# McLaren Vale wine region

# Regional summary report

# 2012

# 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 the Board's office.

### *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 that are known to source fruit from South Australian vineyards are included in the survey collection process. However, not all wineries submit a survey form - therefore the total tonnage reported may underestimate the true crush. An estimate of the non-response rate for each region is provided below each intake summary report. Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

### *Crop value data*

On the survey forms, wineries are asked to record **total purchase value.** This is the total amount paid for fruit of a particular variety at the point of receival – 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.

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. The **estimated total value of purchased grapes** is calculated by multiplying the average purchase value per tonne by the total tonnes purchased. The **estimated total value of total 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.

*Note: in small varieties there may sometimes be only one winery contributing towards a calculated average purchase value per tonne.*

**Important note on average purchase value**
There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts. Therefore the average price should not be compared directly with an individual grower's arrangement.

### *Highest and lowest price*

Wineries are asked to report the highest and lowest prices paid for any parcel of fruit of a particular variety, of any size. The highest of all highest prices, and the lowest of all lowest prices are reported – provided that at least three wineries have provided this information for any particular variety. *Note: the highest or lowest price may be for a very small parcel of fruit - and/or reflect an unusual pricing arrangement - eg payment by the hectare rather than per tonne, "spot market" sales of excess fruit etc.*

## FORECASTS

### *Estimated supply*

Supply forecasts have been calculated independently using the planting information obtained from the PGIBSA vineyard register (see below). They are calculated by multiplying the area of vines by an estimated yield figure determined separately for each variety in each region, which takes into account industry practices and objectives as well as historical averages. However, the supply forecasts do not make any allowance for future vine removals or mothballing, yield capping or the effects of ongoing water restrictions or unusual seasonal conditions.

### *Committed intake*

Committed intake is the amount of fruit that wineries are *already* committed to take in, for a given future year. It is made up of winery grown fruit and contract purchases. Only existing or ongoing contracts are included – not intended future signings or renewals.

# Explanations and Definitions

### *Available supply*

Available supply (uncommitted fruit) is the difference between estimated supply and committed intake. It is the amount of fruit estimated to be available on the open (spot) market. NB If the committed intake is higher than the estimated supply, this indicates a discrepancy between the independent supply forecasts and the wineries' estimates of future production. In this case, available supply is recorded as zero – rather than as a negative number.

*Comparing supply and committed intake*

In order to compare supply with committed intake, the latter figures are "raised" to compensate for non-respondents. There is no raising of supply figures because it is assumed that the PGIBSA vineyard planting information is close to 100% complete. The non-response rate is calculated separately for each region and is indicated below the relevant tables.

## PLANTING DATA

### *Derivation of planting data tables*

Planting data is **not** derived from the 2012 South Australian Crush Survey of wineries. The information is obtained from the vineyard register maintained by the Phylloxera and Grape Industry Board of South Australia.

The Board is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of grapegrowers in the state. All vineyard owners with more than 0.5 hectares are required by law to register with the Board, and to complete an accurate vineyard return each year, giving details of their plantings. This information is kept strictly confidential. An accurate vineyard register enables the Board to produce complete, up-to-date statistical information on vineyard plantings by variety, year planted and location.

For more information on registration of vineyards, please contact the Phylloxera and Grape Industry Board office on 08 8362 0488.

### *Explanatory notes for planting data tables*

1. Planting data tables are current as at April 2011 and include all plantings from the 2010 planting season. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the 2011 report compared with previous reports.

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

3. Where a 0 appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce a slight error in totals or percentages.

# McLaren Vale Vintage overview

## *Vintage report*

The 2012 vintage was one of the most condensed seen in McLaren Vale with crushing completed by the end of March compared with the middle of April in 2011. Indeed some wineries finished pressing out their wine before Easter.

The McLaren Vale vintage was light in crop, but of excellent quality. At this early stage, the wine quality is looking very promising with the reds having excellent colour and flavour, while whites were not affected by sunburn or disease issues.

Harvest weather conditions, during February and March, saw cool nights but warm days ideal for grape development. In response to this, vineyards typically developed two weeks earlier than normal. Chardonnay was harvested from the middle of February with Shiraz beginning at the end of February. By the start of March a large percentage of the district had already been harvested. Harvested yields were 15-30% down across almost all sites.

The March 2012 rainfall total at Willunga, in the south of the region, was 63.2mm received on 8 rain days. This is compared to the long-term average of 26.4mm. By comparison, during March 2011, 78.0mm was recorded. However, this Vintage's rain did not significantly affect harvest. Vintage 2012 was largely free of Botrytis bunch rot. Dry weather with warm winds and low humidity after rain events helped keep high risk varieties like Grenache clean.

Demand for McLaren Vale fruit was high, due to low crops on one hand and the regions reputation for quality on the other. The average prices for McLaren Vale fruit increased in response to this demand.

*James Hook*
*McLaren Vale Crop Watch Editor*

## *Overview of vintage statistics*

The harvest from McLaren Vale in 2012 was 31,755 tonnes, down by 30% (13,763 tonnes) from 2011. The total value of the grapes decreased by $47.5 million to $39.7 million. The average purchase value increased for all major varieties - of the red varieties, Shiraz up by $234 per tonne to $1,474 per tonne; Cabernet Sauvignon up by $251 per tonne to $1,232 per tonne and Grenache up by $136 per tonne to $1,232 per tonne. While of the white varieties, Chardonnay is up by $32 per tonne to $562 per tonne.

There were 52 hectares of new plantings in McLaren Vale in spring 2011 (including top-working and replacements), with 23% Cabernet Sauvignon and 15.4% for both Shiraz and Tempranillo. The total planted area of vines in the region increased from 7,327 hectares to 7,474 hectares.

The estimated production from McLaren Vale for 2013 is 58,850 tonnes with 39,300 tonnes is already committed to the wineries, leaving around 19,550 tonnes (33.2%) uncontracted.

In 2017, the estimated production is 59,300 tonnes, of which 28,000 tonnes is already under contract or winery grown fruit. This leaves an estimated 31,300 tonnes (52.8%) as yet uncommitted.

# McLaren Vale

## Winegrape intake summary - vintage 2012

| Variety | Tonnes purchased | Lowest price[1] | Highest price[1] | Total value purchased grapes | Calc avg. purch. value per tonne | Winery grown fruit | Total crushed[2] | Est total value ALL grapes |
|---|---|---|---|---|---|---|---|---|
| **RED** | | | | | | | | |
| Barbera | 27 | | | $28,189 | $1,041 | 17 | 44 | $46,040 |
| Cabernet Franc | 50 | $800 | $1,800 | $51,033 | $1,020 | 19 | 69 | $70,288 |
| Cabernet Sauvignon | 2,337 | $500 | $5,465 | $2,878,546 | $1,232 | 2,367 | 4,705 | $5,793,701 |
| Carignan | 0 | | | $0 | $0 | 4 | 4 | $5,998 |
| Grenache | 1,073 | $250 | $3,000 | $1,322,098 | $1,232 | 972 | 2,045 | $2,519,924 |
| Malbec | 1 | | | $650 | $650 | 20 | 21 | $13,325 |
| Mataro | 166 | $650 | $2,500 | $219,135 | $1,318 | 152 | 318 | $419,218 |
| Merlot | 743 | $500 | $2,200 | $675,991 | $910 | 719 | 1,461 | $1,329,939 |
| Muscat a Petit Grains Rouge / Rose | 0 | | | $0 | $0 | 10 | 10 | $13,440 |
| Nebbiolo | 0 | | | $0 | $0 | 18 | 18 | $25,081 |
| Other Red | 50 | $1,000 | $3,000 | $85,657 | $1,713 | 106 | 156 | $267,433 |
| Petit Verdot | 108 | $400 | $1,600 | $86,447 | $801 | 210 | 318 | $254,825 |
| Pinot Noir | 342 | $700 | $900 | $281,001 | $821 | 132 | 474 | $389,405 |
| Ruby Cabernet | 0 | | | $0 | $0 | 10 | 10 | $13,631 |
| Sangiovese | 131 | $750 | $2,200 | $176,234 | $1,342 | 171 | 302 | $404,985 |
| Shiraz | 9,488 | $340 | $5,465 | $13,984,945 | $1,474 | 6,773 | 16,262 | $23,968,466 |
| Tempranillo | 79 | $650 | $2,000 | $112,526 | $1,420 | 76 | 155 | $220,636 |
| Touriga | 11 | | | $11,750 | $1,058 | 1 | 12 | $13,125 |
| Zinfandel | 6 | | | $5,058 | $900 | 8 | 13 | $11,934 |
| **Total Red winegrapes** | **14,613** | | | **$19,919,259** | | **11,785** | **26,399** | **$35,781,393** |

*1 Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.*

*2 It is estimated that the non-response rate for McLaren Vale is 9.7%.*

# McLaren Vale

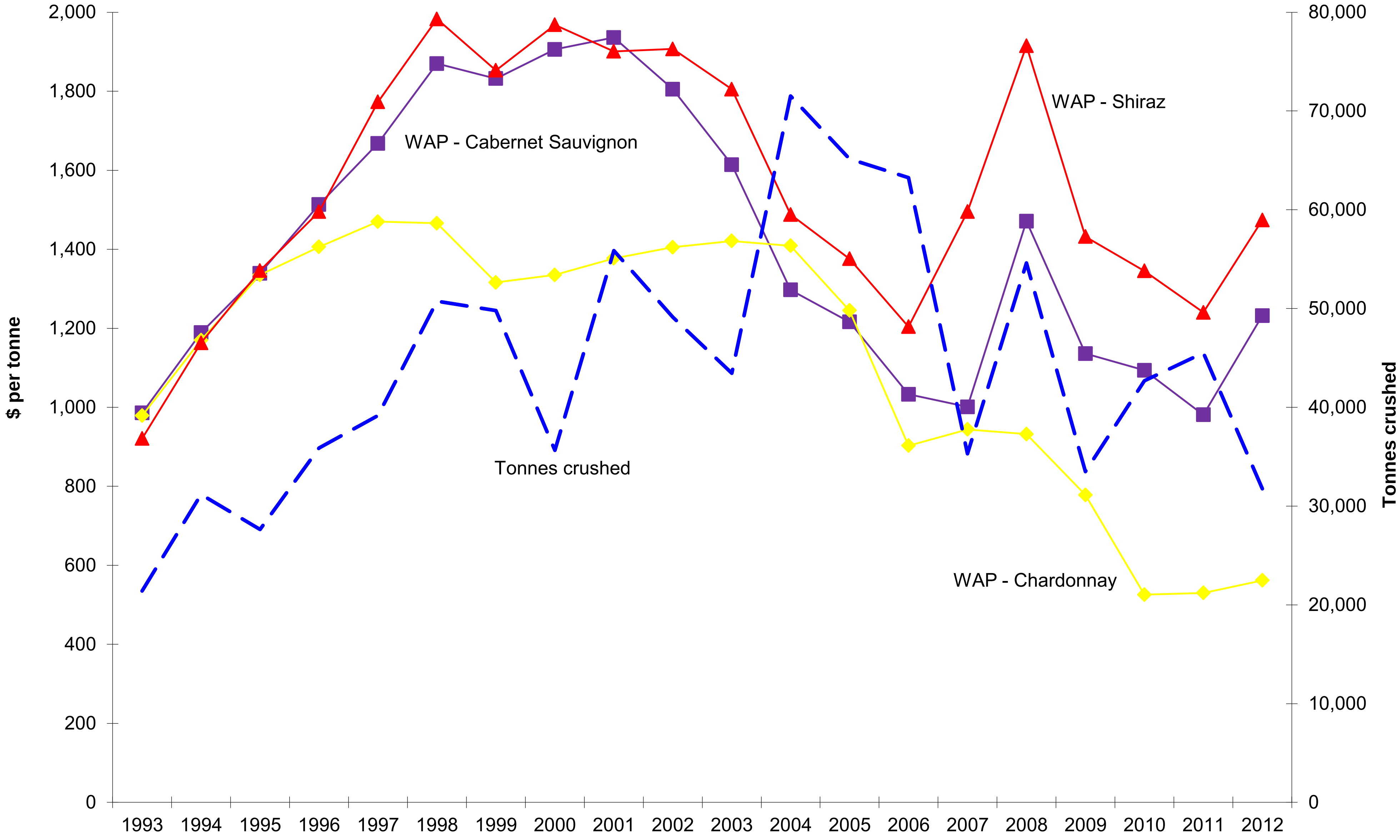
## Winegrape intake summary - vintage 2012

| Variety | Tonnes purchased | Lowest price[1] | Highest price[1] | Total value purchased grapes | Calc avg. purch. value per tonne | Winery grown fruit | Total crushed[2] | Est total value ALL grapes |
|---|---|---|---|---|---|---|---|---|
| **WHITE** | | | | | | | | |
| Chardonnay | 1,850 | $240 | $1,400 | $1,040,084 | $562 | 1,182 | 3,031 | $1,704,485 |
| Chenin Blanc | 69 | | | $73,104 | $1,062 | 29 | 98 | $104,330 |
| Marsanne | 94 | | | $118,978 | $1,267 | 35 | 129 | $163,769 |
| Muscat a Petit Grains Blanc | 0 | | | $0 | $0 | 6 | 6 | $4,514 |
| Other White | 44 | $1,000 | $1,800 | $57,425 | $1,316 | 55 | 99 | $129,650 |
| Pedro Ximenes | 0 | | | $0 | $0 | 26 | 26 | $18,807 |
| Pinot Gris | 0 | | | $0 | $0 | 131 | 131 | $94,876 |
| Riesling | 150 | $600 | $1,400 | $152,774 | $1,017 | 137 | 288 | $292,444 |
| Roussanne | 45 | $1,085 | $2,000 | $51,516 | $1,156 | 22 | 67 | $77,379 |
| Sauvignon Blanc | 382 | $400 | $1,400 | $321,994 | $842 | 304 | 686 | $577,831 |
| Semillon | 151 | $250 | $1,000 | $78,438 | $518 | 217 | 368 | $190,752 |
| Traminer | 6 | | | $4,660 | $795 | 0 | 6 | $4,660 |
| Verdelho | 49 | | | $69,283 | $1,421 | 41 | 90 | $127,929 |
| Viognier | 187 | $300 | $1,458 | $221,060 | $1,182 | 143 | 330 | $389,857 |
| **Total White winegrapes** | **3,027** | | | **$2,189,316** | | **2,329** | **5,356** | **$3,881,284** |
| **Total All winegrapes** | **17,640** | | | **$22,108,575** | | **14,115** | **31,755** | **$39,662,677** |

*1 Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.*

*2 It is estimated that the non-response rate for McLaren Vale is 9.7%.*

**McLaren Vale** **Historical Weighted Average Price vs tonnes crushed**



# McLaren Vale

## Current plantings by variety and year planted

| | Current area in hectares | | | | | |
|---|---|---|---|---|---|---|
| **Variety** | *Pre-2009* | *2009* | *2010* | *2011* | *Total area* | *% planted in 2011* |
| **Red winegrapes** | | | | | | |
| Barbera | 14 | 0 | 0 | 0 | 14 | *0%* |
| Cabernet Franc | 28 | 0 | 0 | 0 | 28 | *0%* |
| Cabernet Sauvignon | 1,266 | 4 | 6 | 12 | 1,287 | *1%* |
| Grenache | 445 | 4 | 4 | 1 | 454 | *0%* |
| Mataro (Mourvedre) | 48 | 12 | 4 | 2 | 66 | *3%* |
| Merlot | 270 | 0 | 0 | 0 | 271 | *0%* |
| Other red | 49 | 5 | 5 | 9 | 68 | *13%* |
| Petit Verdot | 58 | 0 | 0 | 0 | 58 | *0%* |
| Pinot Noir | 70 | 0 | 0 | 0 | 70 | *0%* |
| Sangiovese | 50 | 1 | 4 | 0 | 54 | *0%* |
| Shiraz | 3,761 | 24 | 7 | 8 | 3,800 | *0%* |
| Tempranillo | 33 | 2 | 10 | 8 | 53 | *15%* |
| **Total red varieties** | **6,092** | **52** | **40** | **40** | **6,223** | ***1%*** |
| **White winegrapes** | | | | | | |
| Chardonnay | 567 | 0 | 0 | 0 | 567 | *0%* |
| Chenin Blanc | 20 | 1 | 0 | 2 | 23 | *8%* |
| Marsanne | 12 | 0 | 0 | 0 | 12 | *0%* |
| Muscat A Petit Grains Blanc | 8 | 1 | 1 | 0 | 10 | *0%* |
| Other white | 12 | 1 | 2 | 8 | 23 | *36%* |
| Pinot Gris | 28 | 0 | 0 | 0 | 28 | *0%* |
| Riesling | 48 | 0 | 0 | 2 | 51 | *5%* |
| Roussanne | 10 | 1 | 0 | 0 | 11 | *0%* |
| Sauvignon Blanc | 117 | 0 | 0 | 0 | 117 | *0%* |
| Savagnin Blanc | 8 | 0 | 0 | 0 | 8 | *0%* |
| Semillon | 79 | 0 | 0 | 0 | 79 | *0%* |
| Verdelho | 19 | 0 | 0 | 0 | 19 | *0%* |
| Vermentino | 5 | 1 | 0 | 0 | 7 | *0%* |
| Viognier | 74 | 0 | 0 | 0 | 74 | *0%* |
| **Total white varieties** | **1,008** | **5** | **3** | **12** | **1,028** | ***1%*** |
| Rootstock block | 4 | 0 | 0 | 0 | 4 | *0%* |
| Multi-purpose - white | 3 | 0 | 0 | 0 | 3 | *0%* |
| Unknown variety | 216 | 0 | 0 | 0 | 216 | *0%* |
| **Total all varieties** | **7,323** | **57** | **43** | **52** | **7,474** | ***1%*** |

# McLaren Vale

## Estimated supply and committed intake 2013 - 2017

| | 2013 | | | | 2015 | | | | 2017 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Est Supply [1] | Committed intake [2] | | | Est Supply [1] | Committed intake [2] | | | Est Supply [1] | Committed intake [2] | | |
| **Variety** | | *Winery grapes* | *Contract purchases* | *Total committed intake* | | *Winery grapes* | *Contract purchases* | *Total committed intake* | | *Winery grapes* | *Contract purchases* | *Total committed intake* |
| **Red winegrapes** | | | | | | | | | | | | |
| Barbera | 122 | 28 | 41 | 69 | 122 | 32 | 0 | 32 | 122 | 32 | 0 | 32 |
| Cabernet Franc | 255 | 17 | 47 | 64 | 255 | 22 | 47 | 69 | 255 | 22 | 25 | 47 |
| Cabernet Sauvignon | 7,629 | 4,198 | 3,594 | 7,792 | 7,679 | 4,130 | 1,665 | 5,795 | 7,679 | 4,157 | 1,086 | 5,243 |
| Carignan | 0 | 6 | 0 | 6 | 0 | 6 | 0 | 6 | 0 | 6 | 0 | 6 |
| Grenache | 4,049 | 1,169 | 781 | 1,950 | 4,072 | 1,222 | 656 | 1,878 | 4,072 | 1,228 | 656 | 1,884 |
| Malbec | 0 | 14 | 8 | 22 | 0 | 14 | 0 | 14 | 0 | 14 | 0 | 14 |
| Mataro | 524 | 238 | 165 | 402 | 572 | 285 | 111 | 396 | 572 | 289 | 112 | 402 |
| Merlot | 2,434 | 968 | 721 | 1,688 | 2,435 | 884 | 490 | 1,373 | 2,435 | 886 | 437 | 1,323 |
| Muscat a Petit Grains Rouge / Rose | 0 | 1 | 0 | 1 | 0 | 2 | 0 | 2 | 0 | 2 | 0 | 2 |
| Nebbiolo | 0 | 25 | 0 | 25 | 0 | 25 | 0 | 25 | 0 | 25 | 0 | 25 |
| Other Red | 1,487 | 141 | 61 | 203 | 1,550 | 143 | 35 | 178 | 1,550 | 131 | 18 | 149 |
| Petit Verdot | 524 | 246 | 104 | 350 | 524 | 213 | 46 | 260 | 524 | 213 | 43 | 256 |
| Pinot Noir | 632 | 144 | 352 | 496 | 632 | 138 | 244 | 382 | 632 | 138 | 244 | 382 |
| Ruby Cabernet | 0 | 17 | 0 | 17 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Sangiovese | 470 | 222 | 90 | 312 | 479 | 222 | 57 | 279 | 479 | 223 | 46 | 270 |
| Shiraz | 30,250 | 9,594 | 9,974 | 19,568 | 30,349 | 9,514 | 5,758 | 15,272 | 30,349 | 9,585 | 4,156 | 13,741 |
| Tempranillo | 354 | 142 | 129 | 271 | 413 | 132 | 81 | 213 | 413 | 133 | 85 | 218 |
| Touriga | 0 | 6 | 19 | 25 | 0 | 6 | 13 | 19 | 0 | 6 | 0 | 6 |
| Zinfandel | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total red winegrapes** | **48,729** | **17,174** | **16,086** | **33,260** | **49,082** | **16,989** | **9,205** | **26,194** | **49,082** | **17,091** | **6,907** | **23,998** |

[1] *Supply forecast produced by PGIBSA based on the South Australian vineyard register*
[2] *A raising factor of 1.1 has been applied to committed intake to allow for non-respondents*

# McLaren Vale

# Estimated supply and committed intake 2013 - 2017

| Variety | 2013 Est Supply [1] | 2013 Committed intake[2] Winery grapes | 2013 Committed intake[2] Contract purchases | 2013 Committed intake[2] Total committed intake | 2015 Est Supply [1] | 2015 Committed intake[2] Winery grapes | 2015 Committed intake[2] Contract purchases | 2015 Committed intake[2] Total committed intake | 2017 Est Supply [1] | 2017 Committed intake[2] Winery grapes | 2017 Committed intake[2] Contract purchases | 2017 Committed intake[2] Total committed intake |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **White winegrapes** | | | | | | | | | | | | |
| Chardonnay | 4,537 | 1,394 | 2,304 | 3,698 | 4,537 | 1,374 | 803 | 2,177 | 4,537 | 1,385 | 516 | 1,901 |
| Chenin Blanc | 250 | 11 | 17 | 28 | 263 | 11 | 22 | 33 | 263 | 11 | 22 | 33 |
| Marsanne | 147 | 50 | 58 | 108 | 147 | 50 | 58 | 108 | 147 | 50 | 58 | 108 |
| Muscat a Petit Grains Blanc | 108 | 9 | 0 | 9 | 114 | 9 | 0 | 9 | 114 | 9 | 0 | 9 |
| Other White | 1,685 | 69 | 26 | 96 | 1,747 | 29 | 35 | 64 | 1,747 | 29 | 15 | 44 |
| Pedro Ximenes | 0 | 44 | 0 | 44 | 0 | 44 | 0 | 44 | 0 | 44 | 0 | 44 |
| Pinot Gris | 337 | 188 | 0 | 188 | 337 | 179 | 0 | 179 | 337 | 185 | 0 | 185 |
| Riesling | 387 | 161 | 154 | 315 | 396 | 127 | 154 | 281 | 396 | 127 | 154 | 281 |
| Roussanne | 134 | 22 | 3 | 25 | 138 | 22 | 3 | 25 | 138 | 22 | 3 | 25 |
| Sauvignon Blanc | 933 | 321 | 369 | 690 | 933 | 290 | 354 | 644 | 933 | 290 | 354 | 644 |
| Semillon | 790 | 213 | 187 | 400 | 790 | 204 | 102 | 306 | 790 | 204 | 102 | 306 |
| Traminer | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Verdelho | 225 | 61 | 90 | 151 | 225 | 61 | 90 | 151 | 225 | 61 | 90 | 151 |
| Viognier | 596 | 180 | 117 | 297 | 596 | 183 | 117 | 300 | 596 | 184 | 117 | 301 |
| **Total white winegrapes** | **10,128** | **2,724** | **3,326** | **6,049** | **10,222** | **2,582** | **1,739** | **4,321** | **10,222** | **2,599** | **1,433** | **4,032** |
| **All winegrapes** | **58,858** | **19,897** | **19,412** | **39,309** | **59,303** | **19,571** | **10,944** | **30,515** | **59,303** | **19,690** | **8,339** | **28,030** |

[1] *Supply forecast produced by PGIBSA based on the South Australian vineyard register*
[2] *A raising factor of 1.1 has been applied to committed intake to allow for non-respondents*