

Explanations and definitions

TONNAGE DATA

Definition of regions

Regions have been defined in accordance with declared or interim GI boundaries. Where a GI region has not been declared, or is too small to be reported separately, then the relevant GI zone is used. This year **Bordertown** has once again been included with **Limestone Coast zone - other** as it does not meet the criteria for separate reporting. What was reported last year as **Mount Lofty Ranges - other** has now been more accurately identified as **Adelaide Plains**. Any fruit from Mount Lofty Ranges zone that does not fall into the regions Clare Valley, Adelaide Hills or Adelaide Plains is now reported with **SA - other**.

Total and preferred crush

The **total crushed** is the total tonnes of grapes crushed from a particular source region, whether processed in that region or not.

The **total preferred** is the tonnage that wineries would prefer to have received this vintage.

Percentage of demand supplied is the total tonnes crushed divided by the total preferred expressed as a percentage. A value of 100% means that supply and demand were equal. A value greater than 100% means that there was an oversupply, while a value less than 100% means that wineries would have bought more if available – provided quality or other parameters were met.

Winery owned and independent grower owned vineyards

“Winery” refers to all wine companies, individuals etc who produce wine for their own use or sale. Reported fruit is separated into fruit produced from the winery’s own vineyards (own grown) and from independent grower owned vineyards (purchased). The proportion of purchased fruit is given as a percentage of the total.

PRICE AND BAUMÉ DATA

Total purchase value

The **total purchase value** is defined as the total amount paid for fruit of a particular variety at the weighbridge – NOT including any amount added for freight. It includes any penalties or bonuses (eg baumé) paid 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 **weighted average weighbridge price** is calculated as the total amount paid for all grapes purchased of a particular variety (summed across all wineries) divided by the total tonnes purchased of that variety *for which pricing data has been supplied*. Winery grown grapes are not included in the calculation of weighted average weighbridge price. *Note: in small varieties there may sometimes be only one winery contributing towards a weighted average weighbridge price.*

Reliability of price reporting

Not all wineries report pricing data. The figure in brackets after the weighted average weighbridge price is the percentage of the total tonnes purchased for which pricing data was provided.

There is also considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the weighted average price 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. *Therefore the reported weighted average weighbridge price should not be interpreted as a total district average price.*

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.*

Baumé

Baumé is reported by the wineries as the weighted average baumé of each variety purchased. From this, the weighted average for the region is calculated. Baumé is not reported for own grown fruit. The number in brackets indicates the percentage of purchased fruit for which baumé readings were supplied.

PROJECTIONS OF FUTURE INTAKE

Estimated and preferred

The estimated tonnage is the total tonnes that wineries expect to crush in each of the forecast years - ie the estimated supply of fruit. This includes winery grown and purchased fruit.

The preferred tonnage is the tonnage required by wineries to achieve sales forecasts - ie the estimated demand for winegrapes.

Where the preferred tonnage is higher than the estimated, a shortfall in supply is indicated. However, this does not necessarily mean a general demand for any fruit of that variety; it may have to meet particular specifications.

The projections are provided as at June 2002, and are subject to variation over time, with changes in market requirements, changes in the supply situation and individual variables. It should be noted that there is considerable variation from one survey to the next in projections for the same future forecast year.

The projections should be interpreted and used cautiously and should not be relied upon in making decisions about future production.

Reliability of forecasts

Not all wineries provide estimates of future intakes - particularly for the later forecast years. Therefore an apparent reduction in tonnages in later years may mean that some wineries have not provided a forecast for those years.

A reliability measure for each estimate based on the number of wineries providing a forecast is given after each figure. A reliability of 100% means that all wineries that grew or purchased the variety in the current vintage provided estimates of the tonnages they require in future vintages. A reliability of 50% means that only some wineries provided forecasts, and these wineries accounted for 50% of the tonnes for each variety grown or purchased in the current vintage.

PLANTING DATA

Derivation of planting data tables

Planting data is **not** derived from the 2002 Australian Regional 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 record current plantings, by year planted. 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, only the new variety appears in the database. This explains why the area planted for a given year may be different in the 2002 report compared with previous reports.
2. Vineyard plantings are now recorded in the database by Geographical Indication, whereas previously, they were classified approximately into GI regions or zones by classifying each Hundred into a GI region or zone. Therefore there may be some more significant variation between this report and the previous year's report, where some plantings have been re-classified into another region.
3. Where a 0 appears in a table, this indicates the presence of a planting of less than 0.5 hectares. Where a cell contains a " - " or is blank, there are no plantings of that variety. Rounding may produce a slight error in totals or percentages.
4. Minor anomalies in the record-keeping system account for slight variations in the total area reported for the state in different tables.

State summary

OVERVIEW OF VINTAGE STATISTICS 2002

State and regional overview

The total crush of South Australian winegrapes in 2002 was 707,151 tonnes. This compares with 678,821 tonnes in 2001 – an increase of just 4% in volume (*table 1.1*). Nationally, there was an increase of 19% or 200,000 tonnes from 2001 – to which South Australia only contributed 30,000 tonnes.

The vintage saw a substantial drop in production in most cool climate regions – particularly the Limestone Coast regions and the Adelaide Hills, counterbalanced by a 33% increase in the Riverland and smaller increases in the Barossa and Clare Valleys and the Adelaide Plains (*figures 1.1 and 1.2*).

The Riverland and other inland districts benefited from the late ending to cool and mild conditions, together with an unseasonably mild summer – leading to the production of grapes with some of the best compositions seen in the region, with the added bonus of crop levels generally above average. However, the cool conditions did increase disease pressure in the inland regions, as well as the coastal districts north of Padthaway. In the cooler regions, low crop levels were the result of prolonged below average temperatures and high rainfall inhibiting flowering, pollination and fruit set.

Varietal overview

The red crush was 463,425 tonnes; the white crush was 243,738 tonnes. Red varieties accounted for 66% (two thirds) of the crush – the same as last year (*table 1.2*). There were surpluses in the major red varieties (Shiraz and Cabernet Sauvignon) and shortfalls in the cool climate red varieties – Pinot Noir and Merlot – as well as in the major white varieties (Chardonnay, Sauvignon Blanc, Riesling and Verdelho).

The top three individual varieties were Shiraz (27%), Cabernet Sauvignon (21%) and Chardonnay (14%). Merlot was the next largest variety by volume at 5% of the total crush.

The total estimated weighbridge value of the crush was \$702 million (*table 1.5*). This compares with a total estimated value of \$755 million in 2001. The decrease is attributable to the greater contribution of warm climate fruit to the overall total – which also accounts for a drop in the estimated overall average weighbridge value of purchased fruit per tonne, from \$1028 in 2001 to \$940 in 2002.

Source of fruit

Winery grown fruit accounted for 21% of the crush in 2002 (*table 1.3*), compared with 31% in 2001, and 24% in 2000. The dramatic change from 2001 to 2002 largely reflects the higher percentage of winery-owned vineyards in cool climate regions. The percentage of winery grown fruit is projected to remain stable at around 24% of the crush over the five year forecast period.

Projections of future supply and demand

Projected tonnages over the five year forecast period are expected to stabilise, with only slow growth from 2004 onwards, and a close match between estimated and preferred figures (*table 1.9*). Red tonnages are expected to reach around 606,000 tonnes by 2007, and white tonnages to reach 305,000 tonnes. This reflects a general increase in projections compared with those made by survey respondents last year – when red tonnages were expected to plateau at around 570,000 tonnes and whites at around 260,000 tonnes.

Vineyard plantings

Planting data derived from the Phylloxera and Grape Industry Board's vineyard register shows that there were 61,979 hectares planted to vines in South Australia at 30 April 2002. Of these, 3152 (5%) were planted in 2001 (*table 1.8*). New plantings of red varieties has remained stable at just under 2000 hectares, while plantings of white varieties almost doubled from 604 in 2000 to 1163 in 2001 (*figure 1.7*). There has been something of a recovery in new plantings in 2001 after a significant slow down last year – particularly in the Riverland, Barossa and Langhorne Creek (*figure 1.8*).

Based on the projections supplied by the wineries, and taking an average of the yield figures for the past four years, the required number of hectares to produce the preferred tonnage in 2007 can be estimated for the major South Australian regions (*table 1.10*). This indicates a shortfall in all major regions except the Adelaide Hills – with nearly 5000 hectares required in the Riverland, and nearly 3000 ha in the Barossa/Eden Valleys. The estimated shortfall in the Riverland is much higher than was indicated last year, because the five year forecast demand for fruit has increased by 10,000 tonnes compared with last year.

Table 1.2 VINTAGE 2002 BY VARIETY

Variety	Tonnes crushed	Tonnes preferred	Diff'nce*	% diff*
RED				
Cabernet Franc	2507	2233	274	11%
Cabernet Sauvignon	145567	144478	1089	1%
Grenache	22769	18947	3822	17%
Malbec	2029	2190	-161	-8%
Mataro	9216	8585	631	7%
Merlot	38810	39476	-666	-2%
Meunier	248	240	8	3%
Petit Verdot	11831	8675	3156	27%
Pinot Noir	8781	10069	-1288	-15%
Ruby Cabernet	21374	15647	5727	27%
Sangiovese	2132	1511	621	29%
Shiraz	194843	192523	2320	1%
Tarrango	846	1099	-253	-30%
Other red	2472	2116	356	14%
Total red	463425	447789	15636	3%
WHITE				
Biancone	1079	703	376	35%
Chardonnay	98199	103762	-5563	-6%
Chenin Blanc	7574	7073	501	7%
Colombard	23817	23158	659	3%
Doradillo	3981	3317	664	17%
Muscadelle	788	686	102	13%
Muscat Blanc	1833	1681	152	8%
Muscat Gordo Blanco	26879	26133	746	3%
Palomino	1194	1050	144	12%
Pedro Ximenes	817	649	168	21%
Riesling	17425	20927	-3502	-20%
Sauvignon Blanc	10687	11795	-1108	-10%
Semillon	30134	26795	3339	11%
Sultana	10132	10434	-302	-3%
Sylvaner	1034	925	109	11%
Traminer	1424	1733	-309	-22%
Trebbiano	565	478	87	15%
Verdelho	3923	5342	-1419	-36%
Viognier	685	943	-258	-38%
Other white	1568	1547	20	1%
Total white	243738	249131	-5394	-2%
Total all varieties	707163	696920	10243	1%

Figure 1.3

* A negative difference indicates a shortfall; a positive difference indicates a surplus

VINTAGE 2002 BY SOURCE OF FRUIT BY REGION

Table 1.3

Region	Winery grown (t)	Independent grower (t)	Total crush (t)	% winery grown
Adelaide Hills	1504	9553	11057	14%
Adelaide Plains	557	6200	6757	8%
Barossa Valley	10238	47394	57632	18%
Clare Valley	14265	13028	27293	52%
Coonawarra	11947	5854	17801	67%
Eden Valley	3776	4623	8399	45%
Fleurieu zone - other	384	3726	4110	9%
Langhorne Creek	15941	28920	44861	36%
Limestone Coast zone - other	3876	7840	11716	33%
McLaren Vale	11118	38010	49128	23%
Padthaway	14531	6512	21043	69%
Riverland	54970	378923	433893	13%
SA - other	280	4499	4779	6%
Wrattonbully	5096	3587	8683	59%
Total	148483	558669	707152	21%

2002 CRUSH COMPARED WITH 2007 ESTIMATED DEMAND - BY REGION

Table 1.4

Region	2002 actual (t)	2007 preferred (t)	Diff'ce*	% diff*
Adelaide Hills	11057	19671	-8614	-78%
Adelaide Plains	6757	3880	2877	43%
Barossa Valley	57632	82153	-24521	-43%
Clare Valley	27293	43752	-16459	-60%
Coonawarra	17801	46076	-28275	-159%
Eden Valley	8399	15207	-6808	-81%
Fleurieu zone other	4110	8454	-4344	-106%
Langhorne Creek	44861	79283	-34422	-77%
Limestone Coast - other	11716	19578	-7862	-67%
McLaren Vale	49128	77119	-27991	-57%
Padthaway	21043	30343	-9300	-44%
Riverland	433893	491950	-58057	-13%
Wrattonbully	8683	26318	-17635	-203%
South Australia - other	4779	1952	2827	59%
Total	707152	945736	-238584	-34%

* A negative difference indicates a shortfall; a positive difference indicates a surplus

The actual crush figures in this table are subject to seasonal variations, which may distort the comparison between current production levels and future required levels. In 2002, yields were unusually low in cool climate regions and unusually high in the Riverland. Readers are encouraged to review the forecast tables for the individual regions and compare 2003 forecast supply figures with 2007 forecast demand figures for a more accurate indication of anticipated growth requirements. Also see table 1.9.

VINTAGE STATISTICS 2002 BY REGION

Table 1.5

	total winery grown	total purchased	total crushed	estimated value of purchased grapes	estimated value of total crush	average reliability of estimated value
Adelaide Hills						
Red	434	4797	5230	\$8,314,996	\$9,044,660	92%
White	1070	4757	5827	\$8,167,197	\$10,051,827	96%
Total	1504	9553	11057	\$16,482,193	\$19,096,487	N/A
Adelaide Plains						
Red	390	4105	4496	\$5,244,008	\$5,757,665	100%
White	167	2095	2262	\$2,019,298	\$2,132,227	100%
Total	557	6200	6757	\$7,263,306	\$7,889,892	N/A
Barossa Valley						
Red	6853	28859	35712	\$50,251,991	\$62,031,346	99%
White	3385	18535	21919	\$16,887,866	\$19,951,154	98%
Total	10238	47394	57631	\$67,139,857	\$81,982,500	N/A
Clare Valley						
Red	8920	9237	18157	\$14,759,329	\$28,781,657	100%
White	5345	3791	9136	\$4,612,140	\$11,041,470	100%
Total	14265	13028	27293	\$19,371,469	\$39,823,127	N/A
Coonawarra						
Red	9537	4886	14423	\$9,445,314	\$27,420,981	100%
White	2410	968	3378	\$1,249,827	\$4,084,159	100%
Total	11947	5854	17801	\$10,695,141	\$31,505,139	N/A

	total winery grown	total purchased	total crushed	estimated value of purchased grapes	estimated value of total crush	average reliability of estimated value
Eden Valley						
Red	1822	2556	4379	\$4,795,277	\$8,076,564	100%
White	1953	2066	4020	\$2,864,660	\$5,617,834	99%
Total	3776	4623	8398	\$7,659,937	\$13,694,398	N/A
Fleurieu zone - other						
Red	232	3354	3586	\$5,312,437	\$5,679,085	97%
White	152	372	524	\$454,283	\$636,019	100%
Total	384	3726	4110	\$5,766,720	\$6,315,103	N/A
Langhorne Creek						
Red	13275	25738	39013	\$36,835,158	\$55,625,732	100%
White	2666	3182	5848	\$3,845,853	\$6,882,407	100%
Total	15941	28920	44861	\$40,681,011	\$62,508,139	N/A
Limestone Coast zone - other						
Red	2248	7131	9379	\$8,742,314	\$11,491,906	100%
White	1628	709	2338	\$824,400	\$2,978,679	100%
Total	3876	7840	11716	\$9,566,714	\$14,470,585	N/A
McLaren Vale						
Red	9101	29069	38169	\$53,157,704	\$69,544,676	100%
White	2017	8941	10959	\$11,191,834	\$13,732,104	100%
Total	11118	38010	49128	\$64,349,538	\$83,276,780	N/A

VINTAGE STATISTICS 2002 BY REGION - CONT.D

Table 1.5 continued

	total winery grown	total purchased	total crushed	estimated value of purchased grapes	estimated value of total crush	average reliability of estimated value
Padthaway						
Red	6460	4781	11241	\$7,834,361	\$17,945,344	100%
White	8071	1731	9801	\$2,545,918	\$13,223,845	100%
Total	14531	6512	21043	\$10,380,279	\$31,169,188	N/A
Riverland						
Red	31552	236781	268333	\$180,322,694	\$204,738,855	100%
White	23417	142142	165560	\$75,000,347	\$87,650,324	100%
Total	54970	378923	433893	\$255,323,041	\$292,389,179	N/A
SA - other						
Red	178	3267	3445	\$4,229,132	\$4,458,257	100%
White	102	1232	1333	\$620,860	\$681,890	100%
Total	280	4499	4779	\$4,849,992	\$5,140,148	N/A
Wrattonbully						
Red	4402	3455	7856	\$5,490,823	\$11,996,780	100%
White	694	132	826	\$194,408	\$569,703	100%
Total	5096	3587	8683	\$5,685,231	\$12,566,483	N/A
Grand Total	148483	558668	707151	\$525,214,429	\$701,827,150	N/A

NUMBER OF GROWERS IN 2002 BY GI REGION AND PROPERTY SIZE

Table 1.6

REGION (GI)	Property size in hectares (ha)				Total	Total ha
	<10	10 - 24	25 - 49	>49		
	Number of growers in each category				Total	
ADELAIDE HILLS	133	48	26	7	214	2691
ADELAIDE PLAINS	18	6	2	3	29	428
BAROSSA VALLEY	240	140	69	19	468	8089
BORDERTOWN	0	0	0	6	6	1104
CLARE VALLEY	127	51	16	20	214	4597
COONAWARRA	28	28	14	21	91	5120
EDEN VALLEY	62	23	11	6	102	1649
FAR NORTH ZONE	14	4	1	0	19	162
FLEURIEU OTHER INC KI	44	17	7	2	70	821
LANGHORNE CREEK	20	29	18	24	91	5043
LIMESTONE COAST - OTHER	24	15	7	8	54	1508
MCLAREN VALE	212	83	40	20	355	5723
MOUNT LOFTY RANGES - OTHER	14	3	3	1	21	275
PADTHAWAY	3	3	4	14	24	3351
RIVERLAND	743	349	79	42	1213	19087
WRATTONBULLY	10	15	11	7	43	1961
SA OTHER	22	7	5	0	34	373
NUMBER OF GROWERS	1714	821	313	200	3048	
% OF TOTAL GROWERS	56%	27%	10%	7%	100%	
NUMBER OF HECTARES	8152	12696	10620	30511	61979	
% OF TOTAL HECTARES	13%	20%	17%	49%	100%	

CURRENT PLANTINGS IN SA 2002 BY YEAR PLANTED AND VARIETY - RED

Table 1.7

Variety	Year planted - area in hectares*					Total	% planted in 2001
	Pre-98	1998	1999	2000	2001		
BARBERA	2	1	5	8	3	19	14%
CABERNET FRANC	226	18	24	5	14	287	5%
CABERNET SAUVIGNON	10098	2809	1564	694	600	15764	4%
GRENACHE	1555	78	148	81	30	1891	2%
MALBEC	210	22	53	15	8	309	3%
MATARO	434	68	74	44	14	634	2%
MERLOT	1995	854	485	233	244	3811	6%
NEBBIOLO	4	7	25	18	2	56	4%
PETIT VERDOT	177	186	289	116	90	858	10%
PINOT NOIR	841	180	122	108	45	1296	3%
RUBY CABERNET	436	184	220	40	16	895	2%
SANGIOVESE	74	28	50	50	5	208	2%
SHIRAZ	11238	3148	1868	914	871	18039	5%
TEMPRANILLO	0	7	11	12	39	69	57%
TOURIGA	28	4	-	7	1	40	2%
ZINFANDEL	5	3	11	7	0	26	1%
OTHER RED	136	5	11	29	8	188	4%
TOTAL RED WINEGRAPES	27458	7601	4960	2382	1989	44390	4%

*Planting data tables record current plantings, by year planted. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground.

CURRENT PLANTINGS IN SA2002 BY YEAR PLANTED AND VARIETY - WHITE

Table 1.8 Variety	Year planted - area in hectares*					Total	% planted in 2001
	Pre-98	1998	1999	2000	2001		
CHARDONNAY	5852	154	107	160	674	6947	10%
CHENIN BLANC	317	4	1	-	1	323	0%
COLOMBARD	422	69	122	88	62	763	8%
DORADILLO	206	-	-	-	1	207	1%
MUSCAT BLANC	148	-	-	1	3	152	2%
MUSCAT GORDO BLANCO	1199	13	3	4	11	1230	1%
PALOMINO	86	-	-	-	-	86	0%
PEDRO XIMENEZ	92	-	-	-	-	92	0%
PINOT GRIS	8	9	18	14	6	54	10%
RIESLING	2157	53	100	110	168	2589	7%
SAUVIGNON BLANC	776	121	48	117	106	1168	9%
SEMILLON	1708	64	33	25	7	1837	0%
SULTANA	645	5	3	5	5	663	1%
TRAMINER	184	-	0	-	56	239	23%
VERDELHO	199	37	24	22	10	292	3%
VIOGNIER	40	24	48	57	45	212	21%
OTHER WHITE	379	11	7	0	10	407	2%
TOTAL WHITE WINEGRAPES	14419	563	514	604	1163	17263	7%
TOTAL OTHER VARIETIES	294	8	22	2	0	326	0%
TOTAL ALL VARIETIES	42171	8173	5496	2988	3152	61979	5%

*Planting data tables record current plantings, by year planted. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground.

FORECAST SUPPLY AND DEMAND 2003 - 2007

Table 1.9

	2003			2005			2007		
	Forecast supply	Forecast demand	Diff*	Forecast supply	Forecast demand	Diff*	Forecast supply	Forecast demand	Diff*
Red	542,741	494,548	48,193	599,456	590,583	8,873	606,605	618,276	-11,671
White	258,684	269,769	-11,085	292,097	306,421	-14,325	305,617	327,460	-21,843
Total	801,425	764,317	37,109	891,553	897,004	-5,452	912,222	945,736	-33,514

* A negative difference indicates a shortfall; a positive difference indicates a surplus

ESTIMATED AREA REQUIRED TO MEET PROJECTED DEMAND IN 2007

Table 1.10

Region	2007 demand (tonnes)	Av yield* (past 4 years)	Hectares required	Current hectares	Diff**
Adelaide Hills	19671	10.01	1676	2476	800
Barossa and Eden Valley	97360	7.65	12728	9738	-2990
Clare Valley	43752	6.29	6955	4597	-2358
Coonawarra	46076	7.63	6036	5120	-916
Langhorne Creek	79283	11.36	6980	5043	-1937
L'stone Coast - other	76239	9.99	7631	6820	-811
McLaren Vale	77119	12.15	6350	5723	-627
Riverland	491950	20.46	24042	19087	-4955

* assumes bearing area comprises all plantings from 1999 and before
 ** a negative number indicates a shortfall; a positive number indicates a surplus

The yield figures in this table are subject to seasonal variations, which may affect the calculation of future required plantings. In 2002, yields were unusually low in cool climate regions and unusually high in the Riverland. Readers are encouraged to review the planting tables and forecast tables for the individual regions for a more accurate indication of anticipated growth requirements.