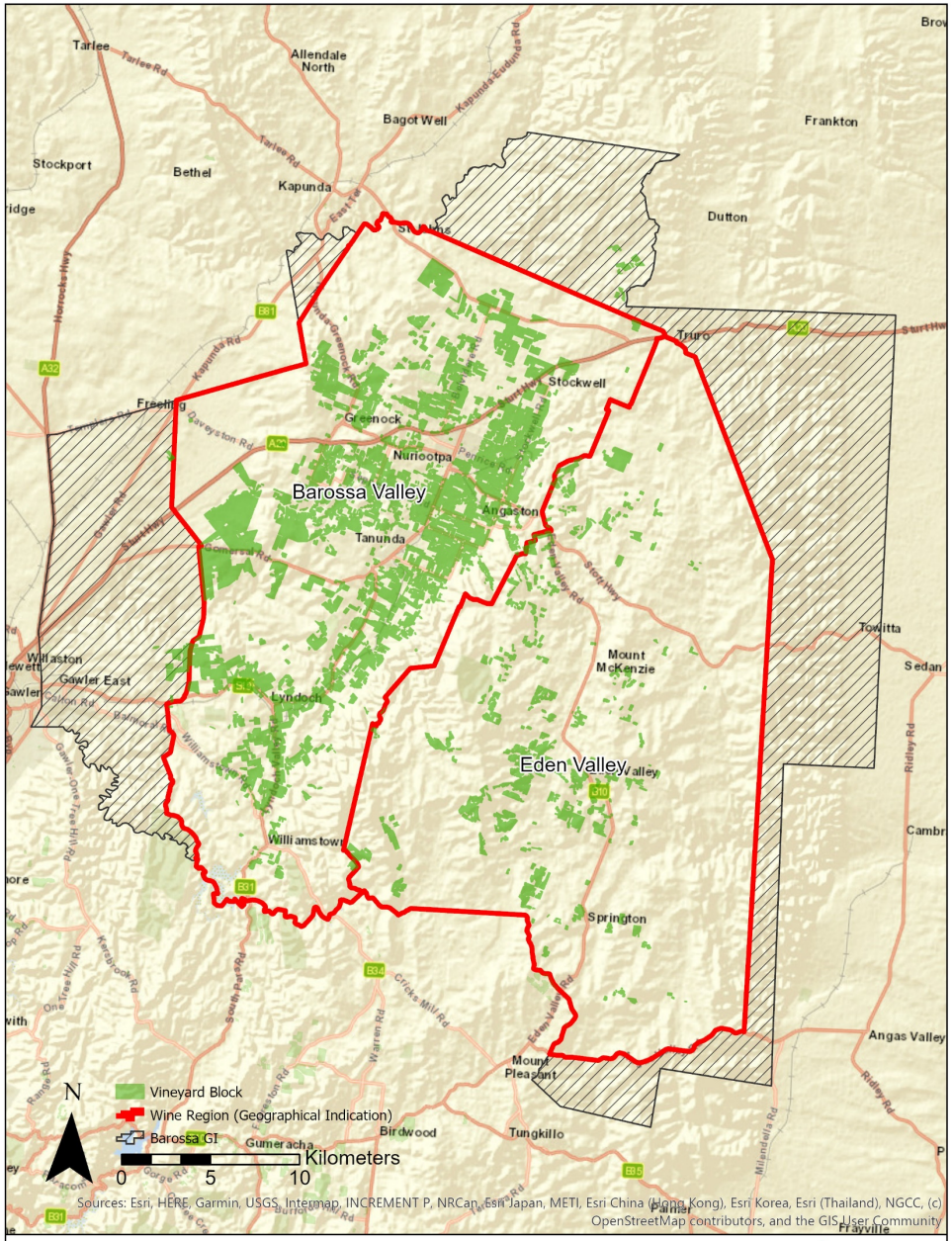


DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Barossa

VINEHEALTH AUSTRALIA

DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth make no representations, either express or implied, that the information displayed is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information displayed.

SA Winegrape Crush Survey 2020

Regional Summary Report

Barossa

Including Barossa Valley and Eden Valley

Wine Australia July 2020

Barossa

Vintage overview

VINTAGE REPORT

Barossa Valley

The growing season started dry and continued that way. The January to June 2019 rainfall was 60% of average. Winter 2019 rain was more promising with 148mm (88% of average), but spring 65mm (54%) and summer 40mm (74%) didn't follow up on the promise. March recorded only 2.8mm (11%) of rain.

The 2019 calendar year was the driest on record for the Nuriootpa weather station.

In some parts of Barossa, flowering was upset by a frost on 18 October. In early November flowering wine grapes endured a period of strong winds, followed by many cold nights through mid-November (day and night temperatures 1 to 1.5 degrees below average). Then in late November, extremely hot weather affected later flowering areas and varieties, notably the 42-degree day on 20 November.

A hot December followed. Of the last 16 days in December, 11 were over 35C and 8 over 40C.

Not surprisingly, the combination of all these extremes meant the vines generally set below average bunch size, and berries remained smaller than normal as they developed.

Later January and February provided some relief. Average February maximum temperature was 26.5C – 3C below average, with average minimum temperature 13.4C, which is 1.2C below the average. This, combined with 21mm of rain on 1 February, enabled many vineyards to slowly ripen their grapes, with flavour and phenological ripening keeping pace with sugar development.

Yields varied from vineyard to vineyard and variety to variety, but most are well below average.

The good news is flavours and colours (in reds) and overall quality is exceptional. Early standout varieties include Shiraz, Grenache and Cabernet Sauvignon..

Eden Valley

Rainfall in Eden Valley for winter 2019 totalled 249mm, slightly higher than winter 2018's total of 226mm. The 2019 total was just 7% below average. However, rainfall totals dropped significantly through spring, reaching only 63% of the long-term average. This trend continued into summer, with growing season rainfall amounting to 125mm, or 67% of average, which was the driest growing season since 2009.

October 2019 recorded a mean maximum temperature 2.18°C warmer than average, whilst December was 3.79°C warmer than average. The October high was driven by a number of days above 30°C, which is unusual for that time of year.

December recorded 9 days where the mercury exceeded 35°C, in two separate heatwave events lasting 5 and 4 days respectively. 20 December recorded a stifling 42°C, and it was the hottest December on record.

February in Eden Valley was unusually cool, with the average maximum temperature of 24.1C being 2.9°C below average. The wines are of exceptional quality. Whites, particularly Riesling and Chardonnay are fine and intense. Reds are deeply coloured and perfumed.

Report prepared by Barossa Grape & Wine Association, in partnership with Yalumba viticulturist Brooke Howell and Yalumba head of winemaking Louisa Rose.

Barossa

Vintage overview

OVERVIEW OF VINTAGE STATISTICS

Barossa Valley

The reported crush of Barossa Valley winegrapes (including Barossa zone – other) was 29,069 tonnes in 2020, down by 29 per cent from the 2019 reported crush of 40,987 tonnes. It was the lowest recorded crush for the region since the survey started in 1996. Over the past five years (up to 2019), the average crush for the Barossa Valley has been 54,661 tonnes, making this year's crush 47 per cent below the five-year average.

There were 80 respondents to the survey who reported crushing grapes from the Barossa Valley in 2020, compared with 78 in 2019.

The total estimated value of winegrapes in 2020 was just under $67 million compared with $84 million in 2019. The lower production was partly offset by an overall increase in the average purchase value of grapes, which increased by 12 per cent from $1992 to $2228 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up 13 per cent to $2612 per tonne, Cabernet Sauvignon up 13 per cent to $2321 per tonne and Grenache up 17 per cent to $2197 per tonne.

The price dispersion data for red varieties shows a very narrow band of prices paid, with 85 per cent of reds being purchased at $2000 per tonne and above. For white varieties, the range was even narrower, with 95 per cent being sold at between $600 and $1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in the Barossa Valley as at 30 April 2020 was 11,801 hectares in 2020, including 237 hectares in Barossa zone – other. This is about 500 hectares more than it was 5 years ago.

There were 86 hectares of new vines planted in the region in the 2019-20 season (including top-working and replacements), with over half being Shiraz.

OVERVIEW OF VINTAGE STATISTICS

Eden Valley

The reported crush of Eden Valley winegrapes was 3624 tonnes in 2020, down by 34 per cent from the 2019 reported crush of 5477 tonnes. It was the lowest recorded crush for the region since the survey started in 1996. Over the past five years (up to 2019), the average crush for Eden Valley has been 9853 tonnes, making this year's crush 63 per cent below the five-year average.

There were 41 respondents to the survey who reported crushing grapes from Eden Valley in 2020, the same as in 2019.

The total estimated value of winegrapes in 2020 decreased from just over $10 million in 2019 to $7.6 million as a result of the lower production, although this was partly offset by an overall increase in the average purchase value of grapes, which increased by 13 per cent from $1907 to $2147 per tonne.

There were increases in average prices for the three largest varieties: Riesling up by 8 per cent to $1780 per tonne, Shiraz up 8 per cent to $2979 per tonne and Chardonnay up by 14 per cent to $1627 per tonne.

83 per cent of red varieties were sold at $2000 per tonne and above. The majority (66%) of whites was sold at between $1500 and $2000 per tonne.

According to Vinehealth Australia data, there were 82 hectares of new vines planted in the region in the 2019-20 season. Almost all the new plantings were Shiraz and Cabernet Sauvignon.

The total vineyard area in Eden Valley as at 30 April 2020 increased by 46 hectares from 2333 hectares in 2019 to 2379 hectares in 2020, indicating that about half of the new plantings were replacements of older vines. The area of vines in Eden Valley is now approximately 100 hectares (5 per cent) larger than it was five years ago.

Barossa

Barossa Valley* winegrape intake summary table – red varieties

** Includes Barossa zone other – 741 tonnes*

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< $300	$300 to <$600	$600 to <$1500	$1500 to <$2000	$2000+							
Red													
Barbera	1				1						0%	1	$1,998
Cabernet Franc	43			28	11	4	$60,116	$1,393	7%	5	10%	48	$66,441
Cabernet Sauvignon	2,029			5	305	1,719	$4,708,508	$2,321	13%	1,796	47%	3,824	$8,876,212
Durif	50				23	27	$101,845	$2,024	17%	3	5%	53	$107,311
Graciano	10			3	7		$15,912	$1,566		10	50%	20	$32,004
Grenache	1,254			11	331	911	$2,754,203	$2,197	17%	305	20%	1,559	$3,424,920
Lagrein	0			0							0%	0	$280
Malbec	12			1	4	7	$23,691	$1,990	8%	42	78%	54	$107,428
Mataro/Mourvedre	383			8	69	306	$869,592	$2,272	17%	249	39%	632	$1,435,073
Merlot	414			220	194		$601,219	$1,451	29%	175	30%	590	$855,766
Montepulciano	21			1	4	16	$63,817	$2,990	61%	18	45%	39	$116,343
Muscat a petits grains rouges	8			8							0%	8	$6,090
Nero d'Avola	1				1					10	89%	11	$21,171
Petit Verdot	15				12	3				46	75%	61	$113,639
Pinot Noir	98			98			$84,940	$866	8%		0%	98	$84,940
Sangiovese	156			130	25		$214,464	$1,377	-2%	16	9%	172	$236,781
Shiraz	10,269				504	9,764	$26,820,934	$2,612	13%	8,046	44%	18,315	$47,836,262
Tempranillo	116				74	42	$232,486	$2,007	10%	27	19%	143	$286,844
Touriga Nacional										51	100%	51	$98,379
Other red	123			56	42	26	$194,859	$1,580	-4%	53	30%	177	$278,946
Red total	**15,004**			**570**	**1,608**	**12,825**	**$36,785,398**	**$2,452**	**14%**	**10,852**	**42%**	**25,856**	**$63,986,826**

Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Barossa

Barossa Valley* winegrape intake summary table – white varieties

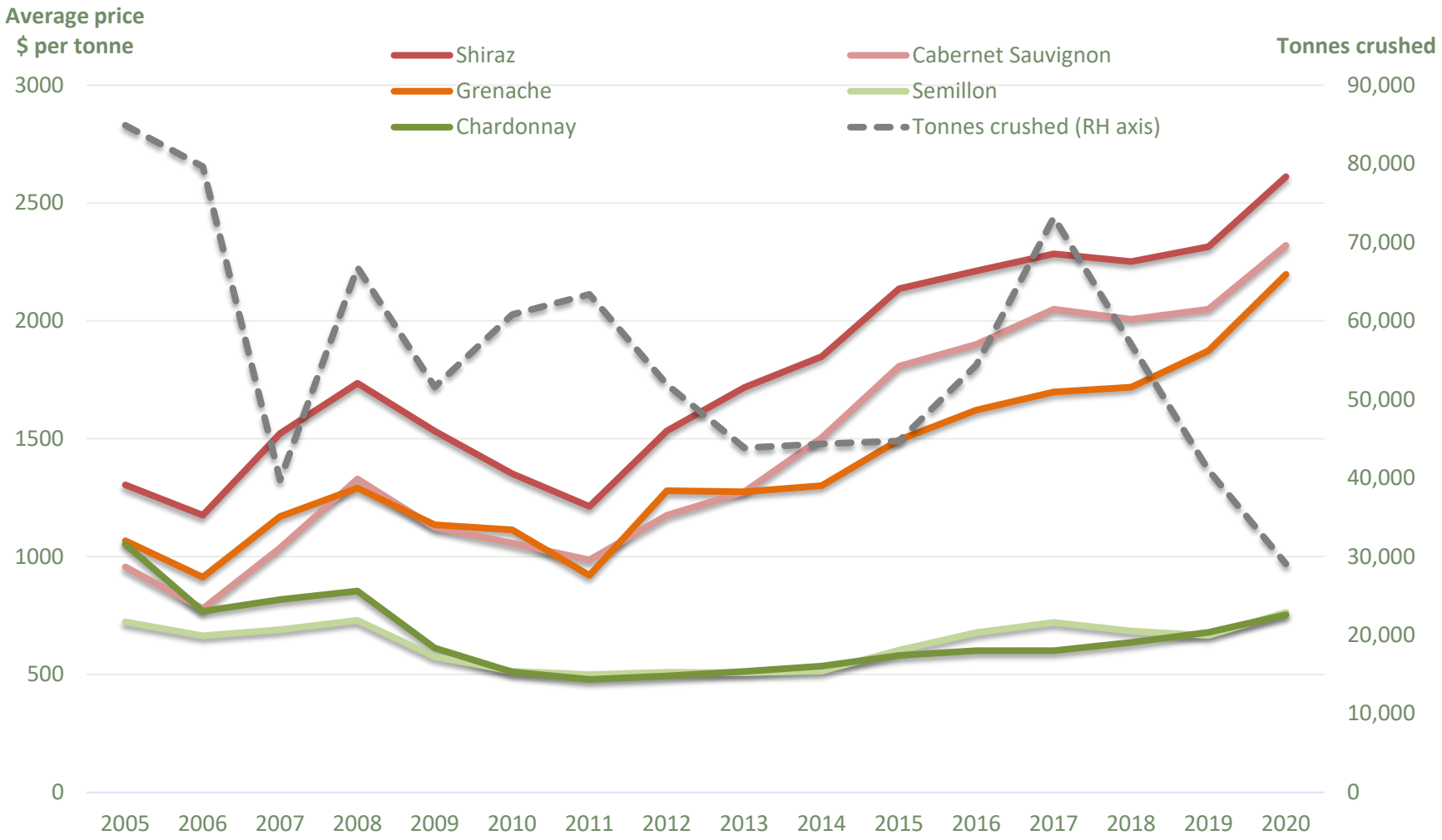
** Includes Barossa zone other – 2 tonnes*

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< $300	$300 to <$600	$600 to <$1500	$1500 to <$2000	$2000+							
White													
Chardonnay	783			780	1	3	$589,684	$753	11%	292	27%	1,076	$809,609
Chenin blanc	4				4						0%	4	$7,548
Fiano										13	100%	13	$20,685
Gewurztraminer	40			40							0%	40	$29,775
Marsanne	7				7		$10,147	$1,521	-5%	13	66%	20	$29,936
Muscat a petits grains blancs	156			154	1	1	$171,640	$1,100	17%	48	23%	204	$224,254
Pinot Gris/Grigio	102			97	5		$110,049	$1,083		42	29%	144	$155,509
Riesling	359			345	14		$320,214	$892	4%	58	14%	417	$372,048
Roussanne	4				4		$6,460	$1,709		1	12%	4	$7,335
Sauvignon Blanc	230			230			$200,800	$873	2%	18	7%	248	$216,420
Semillon	547		2	527	18		$417,809	$763	15%	121	18%	668	$510,043
Vermentino	44			42	3		$42,738	$966		6	11%	50	$48,108
Viognier	209			158	37	14	$282,286	$1,350	1%	13	6%	222	$299,303
Other white	17			7	3	6	$29,105	$1,756	33%	88	84%	105	$183,722
White total	**2,502**		**2**	**2,381**	**95**	**23**	**$2,218,255**	**$887**	**9%**	**712**	**22%**	**3,214**	**$2,914,295**
Grand total	**17,506**		**2**	**2,952**	**1,704**	**12,849**	**$39,003,653**	**$2,228**	**12%**	**11,563**	**40%**	**29,069**	**$66,901,120**

Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Barossa

Historical weighted average price vs tonnes crushed – Barossa Valley



Barossa

Eden Valley winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< $300	$300 to <$600	$600 to <$1500	$1500 to <$2000	$2000+							
Red													
Barbera										0	100%	0	$704
Cabernet Franc	7					7				2	26%	9	$23,063
Cabernet Sauvignon	117					117	$349,016	$2,973	19%	131	53%	248	$737,180
Durif										0	100%	0	$175
Graciano	3					3				2	35%	4	$9,559
Grenache	10				3	7	$26,654	$2,737	9%	2	15%	11	$31,175
Lagrein										0	100%	0	$221
Mataro/Mourvedre	3					3				6	69%	8	$21,283
Merlot	45			11	32	3	$73,505	$1,640	23%	30	40%	75	$122,859
Montepulciano	3					3				8	75%	11	$26,321
Nebbiolo										1	100%	1	$2,174
Nero d'Avola	2					2					0%	2	$3,955
Petit Verdot										21	100%	21	$23,691
Pinot Noir	67			56	11		$86,879	$1,303	5%	28	29%	94	$122,813
Shiraz	601				34	567	$1,789,493	$2,979	8%	355	37%	956	$2,847,672
Tempranillo	8					8				0	2%	8	$17,001
Other red	2			2						11	86%	12	$14,036
Red total	**866**			**68**	**79**	**719**	**$2,384,576**	**$2,755**	**15%**	**596**	**41%**	**1,462**	**$4,003,881**
White													
Chardonnay	145			12	129	4	$236,453	$1,627	14%	201	58%	346	$563,001
Gewurztraminer	27			27						2	8%	30	$34,260
Gruner Veltliner										3	100%	3	$6,620
Muscat a petits grains blancs	19			17	1	1	$19,646	$1,031		1	4%	20	$20,547
Pinot Gris/Grigio	43			21	22		$66,231	$1,526	13%	138	76%	181	$276,463
Riesling	522			10	421	91	$929,474	$1,780	8%	690	57%	1,212	$2,157,316
Roussanne	23			8	15					3	12%	26	$39,533
Sauvignon Blanc	48			41	7		$49,583	$1,044	7%	62	57%	110	$114,487
Semillon	84			84			$60,372	$720	1%	12	12%	96	$68,826
Viognier	36				26	10	$86,556	$2,391	21%	48	57%	84	$201,617
Other white	12				12					43	78%	55	$87,776
White total	**960**			**220**	**633**	**106**	**$1,533,927**	**$1,598**	**5%**	**1,203**	**56%**	**2,162**	**$3,570,446**
Grand total	**1,825**			**288**	**712**	**825**	**$3,918,502**	**$2,147**	**13%**	**1,799**	**50%**	**3,624**	**$7,574,327**

Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Barossa

Barossa Valley* current plantings by variety and year planted – red varieties

** Includes Barossa zone other – 227 hectares*

Variety	*Pre-2017*	*2017*	*2018*	*2019*	*Total area*	*% planted in 2019*
Red winegrapes						
Cabernet Franc	23	2	0	0	25	0%
Cabernet Sauvignon	1,554	39	39	18	1650	1%
Durif (Petite Sirah)	20	0	0	1	21	5%
Grenache	629	4	5	18	656	3%
Malbec	24	4	2	0	30	0%
Mataro (Mourvedre)	269	15	6	0	290	0%
Merlot	281	2	0	0	283	0%
Petit Verdot	19	0	0	0	19	0%
Pinot Noir	35	0	0	0	35	0%
Sangiovese	28	0	0	0	28	0%
Shiraz	7,240	150	111	48	7549	1%
Tempranillo	96	0	0	0	96	0%
Zinfandel	12	0	0	0	12	0%
Other Red	102	5	6	0	113	0%
Total red varieties	**10,332**	**221**	**169**	**85**	**10,807**	**1%**

Source: Vinehealth Australia

Barossa

Barossa Valley* current plantings by variety and year planted – white varieties

** Includes Barossa zone other – 10 hectares (variety unknown)*

Variety	*Pre-2017*	*2017*	*2018*	*2019*	*Total area*	*% planted in 2019*
White winegrapes						
Chardonnay	264	0	0	0	264	0%
Chenin Blanc	11	0	0	0	11	0%
Marsanne	8	0	1	0	9	0%
Muscadelle (Tokay)	12	0	0	0	12	0%
Muscat A Petit Grains Blanc (White Frontignac)	47	0	0	0	47	0%
Pedro Ximenez	5	0	0	0	5	0%
Pinot Gris	13	0	0	0	13	0%
Riesling	134	0	0	0	134	0%
Sauvignon Blanc	48	0	0	0	48	0%
Semillon	274	0	0	0	274	0%
Vermentino	7	0	0	0	7	0%
Viognier	50	0	0	0	50	0%
Other White	43	0	1	1	45	2%
Total white varieties	**916**	**0**	**2**	**1**	**919**	**0%**
Unknown variety	75	0	0	0	75	0%
Total all varieties	**11,323**	**221**	**171**	**86**	**11,801**	**1%**

Source: Vinehealth Australia

Barossa

Eden Valley current plantings by variety and year planted

Variety	*Pre-2017*	*2017*	*2018*	*2019*	*Total area*	*% planted in 2019*
Red winegrapes						
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	334	8	3	37	382	10%
Grenache	20	0	0	1	21	5%
Mataro (Mourvedre)	16	0	0	1	17	6%
Merlot	57	0	0	0	57	0%
Petit Verdot	7	0	0	0	7	0%
Pinot Noir	51	3	0	0	54	0%
Shiraz	757	15	30	41	843	5%
Tempranillo	12	0	0	0	12	0%
Other Red	15	3	0	0	18	0%
Total red varieties	**1,275**	**29**	**33**	**80**	**1,417**	**6%**
White winegrapes						
Chardonnay	244	0	0	0	244	0%
Muscat A Petit Grains Blanc (White Frontignac)	6	0	0	0	6	0%
Pinot Gris	40	0	0	0	40	0%
Riesling	519	0	5	2	526	0%
Sauvignon Blanc	42	0	0	0	42	0%
Semillon	17	0	0	0	17	0%
Traminer (Gewurztraminer)	16	0	0	0	16	0%
Viognier	33	0	0	0	33	0%
Other White	20	0	0	0	20	0%
Total white varieties	**937**	**0**	**5**	**2**	**944**	**0%**
Unknown variety	18	0	0	0	18	0%
Total all varieties	**2,230**	**29**	**38**	**82**	**2,379**	**3%**

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 per cent; 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 receival – not including specific amounts paid for 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-June 2020).

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.

Average and total purchase values are not reported where there are fewer than three purchasers of a variety in a particular region. However the values are included in the calculation of totals for each region.

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.

Price dispersion data (shaded columns in Intake Summary tables)

All purchases for each variety are grouped into price segments according to the price paid for that batch of fruit. The sum of tonnes in all the price segments may not match the total tonnes purchased where there are tonnes reported without an associated price.

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 for the same variety across similar regions, or 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 - continued

PLANTING DATA

Source of planting data tables

Planting data is not collected by the Australian National Vintage 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 and provided for this survey in a deidentified and aggregated manner.

For more information on the planting data in this report or about registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.

Explanatory notes for planting data tables

To protect confidentiality, the following rules are applied to reporting varieties:

- where there are fewer than 10 registered owners with plantings of a particular variety across the state, that variety is not separately identified in either the state or the regional reports but is grouped with “other red/white”, AND
- where there are fewer than three registered owners with a particular grape variety in a given region, that variety is not separately identified in the regional report but is grouped with “other red/white” unless it is a white variety listed in the top seven, or red variety in the top five by planted area for the state for the current year.

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- Planting data tables are current as at 30 April 2020 and include all plantings from the 2019–20 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.
- 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 current report compared with previous reports.
- 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 discrepancies in totals.

Acknowledgements

AUSTRALIAN NATIONAL VINTAGE SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian National Vintage 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.

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 www.winesa.asn.au.

Credits

Images – Wine Australia
GI maps – Vinehealth Australia

About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), growing domestic and international markets, protecting the reputation of Australian wine and administering the Export and Regional Wine Support Package (ERWSP).

Wine Australia is an Australian Commonwealth Government statutory authority, established under the *Wine Australia Act 2013*, and funded by grape growers and winemakers through levies and user-pays charges and the Australian Government, which provides matching funding for RDA investments and funds the ERWSP.

Disclaimer

Note: data published in this report supercedes that in earlier reports. Minor variations in reported figures can occur due to data revisions.

Any questions about the report should be directed to:

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