

The SA Winegrape Crush Survey 2021



Prepared on behalf of
South Australian Wine Industry Association Inc
Wine Grape Council South Australia

Wine Australia July 2021

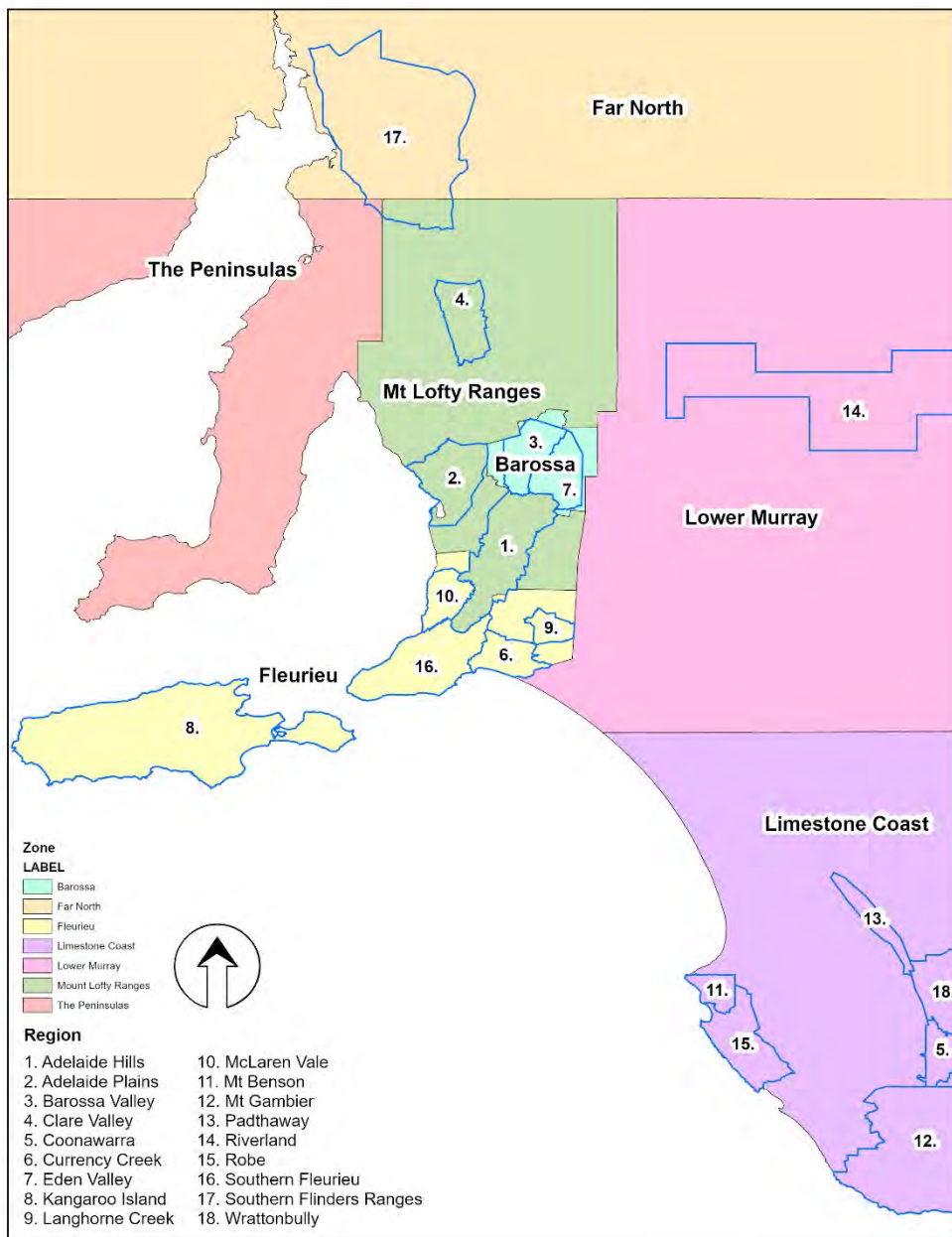
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SA Winegrape Crush Survey 2021

South Australia State Summary Report

Wine Australia July 2021



Geographical Indication Zones and Regions in South Australia

SCALE: 1:2,500,000
DATUM: GDA2020
PROJECTION: Transverse Mercator
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Wine Regions - Wine Australia



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State summary 2021

Overview of vintage statistics

State and regional overview

The total reported crush of South Australian winegrapes in 2021 was 941,113 tonnes. This was the largest crush ever recorded for the state, 45 per cent above the very low 2020 crush of 651,195 tonnes and 28 per cent above the 10-year average (2011-2020) of 736,149 tonnes.

While it was a record crush overall, the Riverland and Wrattenbully were the only regions to have individual record vintages.

The Riverland crushed 558,252 tonnes, 27 per cent above the 10-year average and the first time a crush of over 500,000 tonnes has been recorded. It accounted for 59 per cent of the state total.

The next three largest regions were the Barossa Valley (including Barossa zone other) which crushed 61,410 tonnes, Langhorne Creek with 53,523 tonnes and Coonawarra with 50,199 tonnes. Wrattenbully crushed 32,738 tonnes, 74 per cent above the 10-year average and nearly three times the size of the 2020 vintage.

The total estimated value of the crush was \$827 million compared with \$556 million in 2020, reflecting the increased volume. The overall average value across the state was virtually unchanged at \$792 compared with \$789 per tonne. Decreases in most individual regions were offset by an increase in the share of higher value regions to the overall mix.

Weighted average prices for the top variety in all the major regions generally decreased if it was red, or increased if it was white (see page 10).

Varietal overview

The red crush was 620,259 tonnes in 2021, with the two top varieties, Shiraz and Cabernet Sauvignon, making up 79 per cent of the total. The red crush increased by 54 per cent compared with 2020. All red varieties increased, with Shiraz up by 58 per cent, Cabernet Sauvignon by 53 per cent and Pinot Noir by 72 per cent.

The white crush was up by 29 per cent overall, a small increase than the reds, causing it to lose share from 38 per cent in 2020 to 34 per cent in 2021. All major white varieties increased in volume except Gewürztraminer (down 15 per cent). Chardonnay was up by 38 per cent, Sauvignon Blanc by 19 per cent and Pinot Gris/Grigio by 54 per cent.

Vineyard plantings

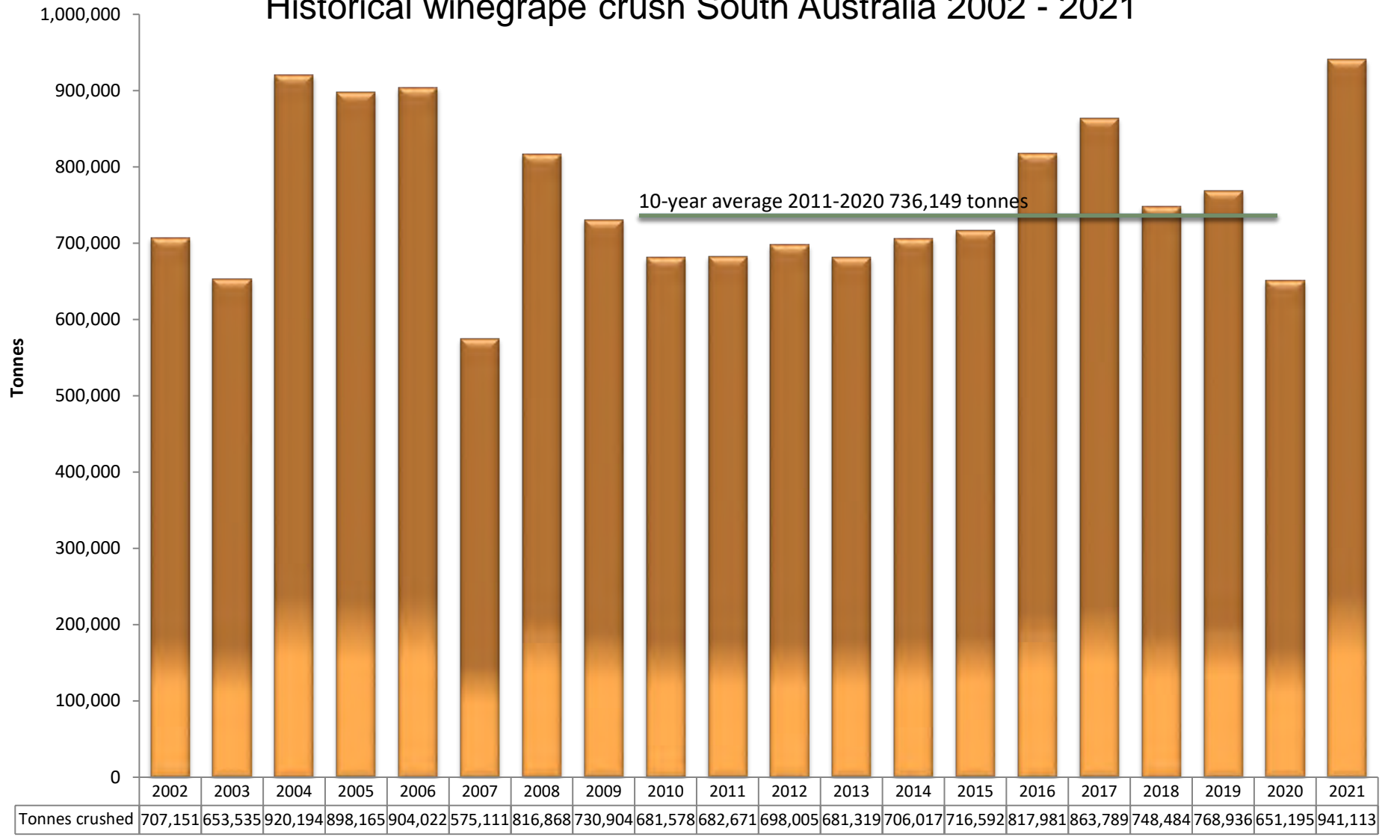
Planting data derived from the Vinehealth Australia vineyard register shows that there were 76,177 hectares planted to vines in South Australia as at 30 April 2021. This represents a net increase of 169 hectares in the last 12 months.

There are indications of a continued increase in new plantings, with a total of 661 hectares planted in the 2020–21 planting season (including top-working and replacements) compared with 996 hectares in the previous season. Almost all the new plantings were red varieties, with Shiraz making up half of all new plantings (376 hectares) followed by Cabernet Sauvignon (166 hectares). Riesling was the most planted white variety by area. The largest area of new plantings in the state was in Padthaway (190 hectares) followed by the Barossa Valley (119 hectares).

There were 3,246 vineyard owners registered with Vinehealth Australia as at 30 April 2021, compared with 3,271 in 2020.

State summary 2021

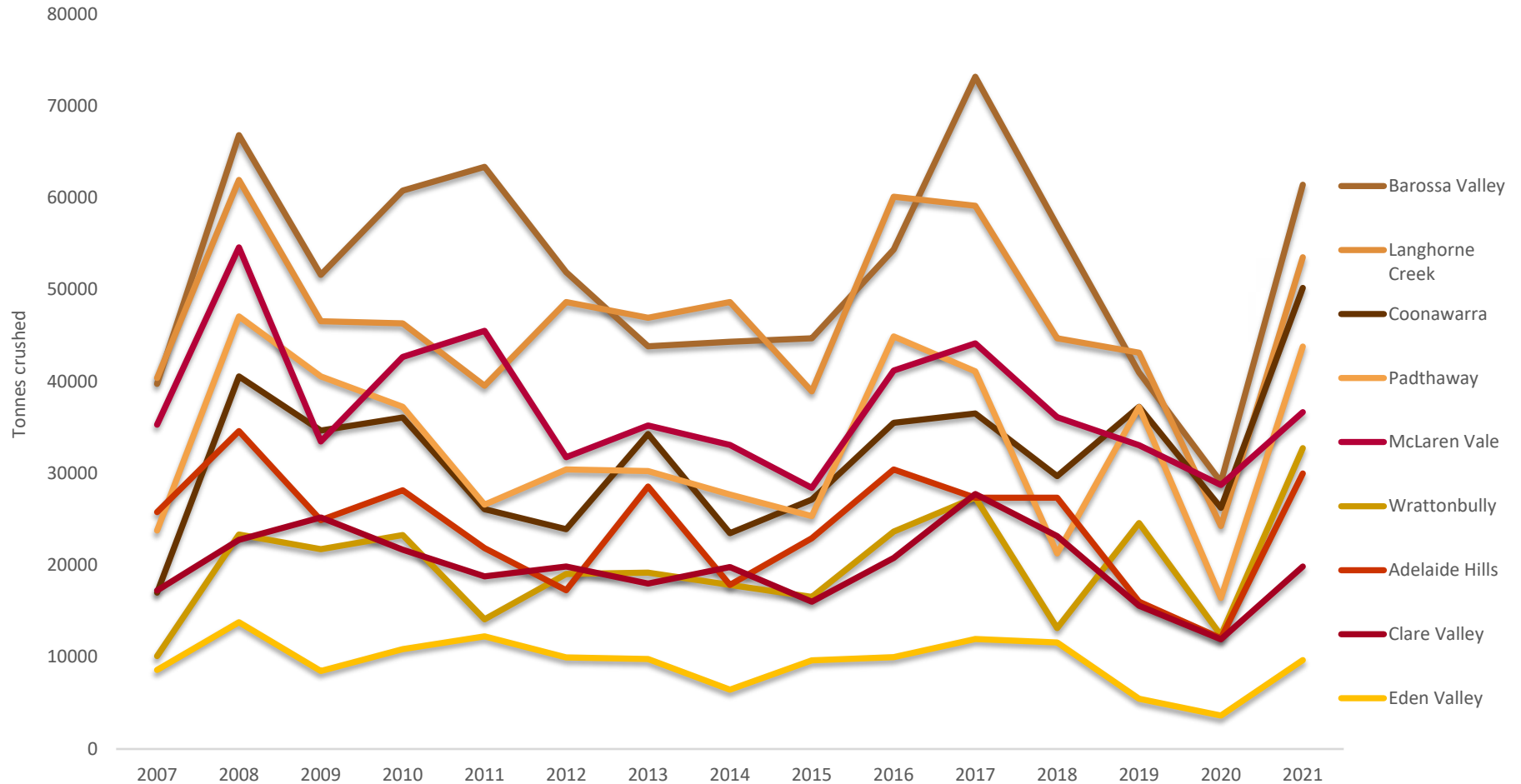
Historical winegrape crush South Australia 2002 - 2021



State summary 2021

Vintage by region 2007 - 2021

Riverland excluded due to scale differences



State summary 2021

Total crush by GI region 2021 vs 2020

| GI Region | Purchased (tonnes) | Winery grown (tonnes) | Total crush 2021 | Region share of state | Total crush 2020 | % change |
|-------------------------------|-----------------------|--------------------------|---------------------|--------------------------|---------------------|------------|
| Adelaide Hills | 22,379 | 7,612 | 29,991 | 3.2% | 12,049 | 149% |
| Adelaide Plains | 2,905 | | 2,905 | 0.3% | 2,125 | 37% |
| Barossa Valley | 34,529 | 25,489 | 60,018 | 6.4% | 28,326 | 112% |
| Barossa zone other | 65 | 1,326 | 1,392 | 0.1% | 743 | 87% |
| Clare Valley | 7,335 | 12,522 | 19,857 | 2.1% | 11,946 | 66% |
| Coonawarra | 12,891 | 37,308 | 50,199 | 5.3% | 26,240 | 91% |
| Currency Creek | 1,787 | 3,744 | 5,532 | 0.6% | 3,189 | 73% |
| Eden Valley | 4,334 | 5,336 | 9,669 | 1.0% | 3,624 | 167% |
| Fleurieu zone other | 3,358 | 41 | 3,399 | 0.4% | 2,167 | 57% |
| Kangaroo Island | 15 | 144 | 159 | 0.0% | 145 | 10% |
| Langhorne Creek | 35,174 | 18,349 | 53,523 | 5.7% | 24,286 | 120% |
| Limestone Coast zone other | 6,931 | 10,883 | 17,814 | 1.9% | 7,129 | 150% |
| Lower Murray zone other | 3,790 | 108 | 3,899 | 0.4% | 4,117 | -5% |
| McLaren Vale | 22,209 | 14,449 | 36,659 | 3.9% | 28,751 | 28% |
| Mount Benson | 2,020 | 960 | 2,980 | 0.3% | 2,260 | 32% |
| Mount Gambier | 793 | 25 | 818 | 0.1% | 649 | 26% |
| Mount Lofty Ranges zone other | 826 | 63 | 889 | 0.1% | 604 | 47% |
| Padthaway | 25,375 | 18,427 | 43,802 | 4.7% | 16,428 | 167% |
| Riverland | 434,002 | 124,250 | 558,252 | 59.3% | 461,385 | 21% |
| Robe | 514 | 3,750 | 4,264 | 0.5% | 1,356 | 214% |
| Southern Fleurieu | 1,010 | 4 | 1,013 | 0.1% | 608 | 67% |
| Southern Flinders Ranges | 681 | 453 | 1,135 | 0.1% | 615 | 84% |
| The Peninsulas | 179 | 26 | 206 | 0.0% | 79 | 160% |
| Wrattonbully | 11,748 | 20,991 | 32,738 | 3.5% | 12,372 | 165% |
| Total all regions | 634,852 | 306,261 | 941,113 | 100% | 651,195 | 45% |

State summary 2021

Vintage summary by GI region 2021

| Region | Colour | Winery grown (tonnes) | Purchased (tonnes) | Total crush 2021 | Est value of purchased grapes | Est value of all grapes |
|--|--------|--------------------------|-----------------------|---------------------|-------------------------------------|----------------------------|
| Adelaide Hills | Red | 2,979 | 8,147 | 11,126 | \$15,155,890 | \$20,733,953 |
| | White | 4,633 | 14,231 | 18,864 | \$23,284,760 | \$30,765,650 |
| | Total | 7,612 | 22,379 | 29,991 | \$38,440,650 | \$51,499,603 |
| Adelaide Plains | Red | - | 2,125 | 2,125 | \$2,306,748 | \$2,306,748 |
| | White | - | 781 | 781 | \$819,243 | \$819,243 |
| | Total | - | 2,905 | 2,905 | \$3,125,991 | \$3,125,991 |
| Barossa Valley inc Barossa Zone other | Red | 25,815 | 31,527 | 57,342 | \$75,349,315 | \$136,083,548 |
| | White | 1,001 | 3,067 | 4,068 | \$2,863,145 | \$3,858,548 |
| | Total | 26,816 | 34,594 | 61,410 | \$78,212,460 | \$139,942,096 |
| Clare Valley | Red | 9,726 | 4,215 | 13,942 | \$6,831,622 | \$22,982,956 |
| | White | 2,795 | 3,120 | 5,915 | \$4,190,258 | \$8,038,503 |
| | Total | 12,522 | 7,335 | 19,857 | \$11,021,880 | \$31,021,459 |
| Coonawarra | Red | 33,495 | 11,931 | 45,426 | \$16,159,156 | \$61,359,464 |
| | White | 3,814 | 959 | 4,773 | \$832,480 | \$4,218,022 |
| | Total | 37,308 | 12,891 | 50,199 | \$16,991,636 | \$65,577,486 |
| Currency Creek | Red | 3,279 | 1,512 | 4,791 | \$1,787,158 | \$5,673,668 |
| | White | 465 | 276 | 741 | \$271,652 | \$620,443 |
| | Total | 3,744 | 1,787 | 5,532 | \$2,058,810 | \$6,294,111 |
| Eden Valley | Red | 2,837 | 2,520 | 5,357 | \$6,496,776 | \$13,485,210 |
| | White | 2,498 | 1,814 | 4,312 | \$3,002,697 | \$7,324,422 |
| | Total | 5,336 | 4,334 | 9,669 | \$9,499,472 | \$20,809,632 |
| Fleurieu zone - other inc Southern Fleurieu and Kangaroo Island | Red | 123 | 2,552 | 2,675 | \$2,806,098 | \$2,996,547 |
| | White | 65 | 1,831 | 1,896 | \$1,572,851 | \$1,655,242 |
| | Total | 188 | 4,383 | 4,572 | \$4,378,949 | \$4,651,789 |

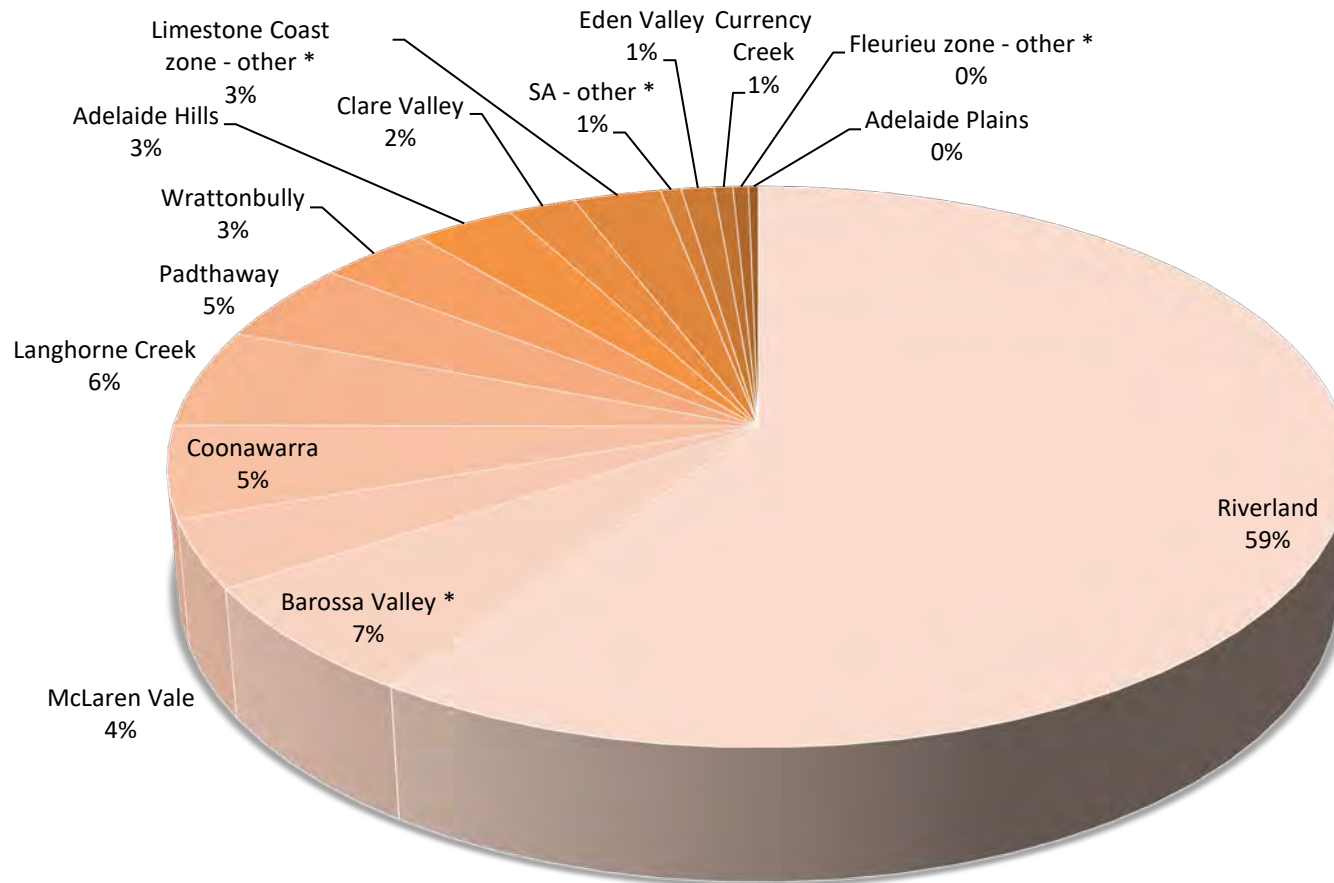
State summary 2021

Vintage summary by GI region 2021 (continued)

| Region | Colour | Winery grown (tonnes) | Purchased (tonnes) | Total crush 2021 | Est value of purchased grapes | Est value of all grapes |
|--|--------------|--------------------------|-----------------------|---------------------|-------------------------------------|----------------------------|
| Langhorne Creek | Red | 15,090 | 29,551 | 44,641 | \$29,337,605 | \$44,039,483 |
| | White | 3,259 | 5,623 | 8,882 | \$4,173,786 | \$6,683,453 |
| | Total | 18,349 | 35,174 | 53,523 | \$33,511,391 | \$50,722,936 |
| Limestone Coast zone - other inc Robe, Mt Benson and Mt Gambier | Red | 12,465 | 8,334 | 20,800 | \$8,136,582 | \$20,337,021 |
| | White | 3,153 | 1,923 | 5,076 | \$1,977,218 | \$5,027,179 |
| | Total | 15,619 | 10,258 | 25,876 | \$10,113,800 | \$25,364,200 |
| McLaren Vale | Red | 13,785 | 20,532 | 34,317 | \$41,287,084 | \$68,949,970 |
| | White | 664 | 1,678 | 2,342 | \$1,949,580 | \$2,891,203 |
| | Total | 14,449 | 22,209 | 36,659 | \$43,236,664 | \$71,841,173 |
| Padthaway | Red | 12,661 | 14,384 | 27,045 | \$16,462,605 | \$30,563,393 |
| | White | 5,765 | 10,991 | 16,757 | \$8,515,769 | \$12,901,891 |
| | Total | 18,427 | 25,375 | 43,802 | \$24,978,374 | \$43,465,284 |
| Riverland | Red | 80,349 | 239,447 | 319,796 | \$131,651,348 | \$175,385,640 |
| | White | 43,901 | 194,554 | 238,456 | \$79,238,778 | \$97,401,935 |
| | Total | 124,250 | 434,002 | 558,252 | \$210,890,126 | \$272,787,575 |
| Wrattonbully | Red | 16,916 | 9,586 | 26,503 | \$10,503,080 | \$29,050,556 |
| | White | 4,074 | 2,161 | 6,235 | \$1,856,022 | \$5,946,844 |
| | Total | 20,991 | 11,748 | 32,738 | \$12,359,102 | \$34,997,400 |
| SA - other inc The Peninsulas and Southern Flinders Ranges | Red | 554 | 3,819 | 4,373 | \$3,492,930 | \$4,134,079 |
| | White | 97 | 1,659 | 1,755 | \$733,389 | \$798,404 |
| | Total | 651 | 5,477 | 6,128 | \$4,226,319 | \$4,932,482 |
| All winegrapes | Total | 306,261 | 634,852 | 941,113 | \$503,045,624 | \$827,033,217 |

State summary 2021

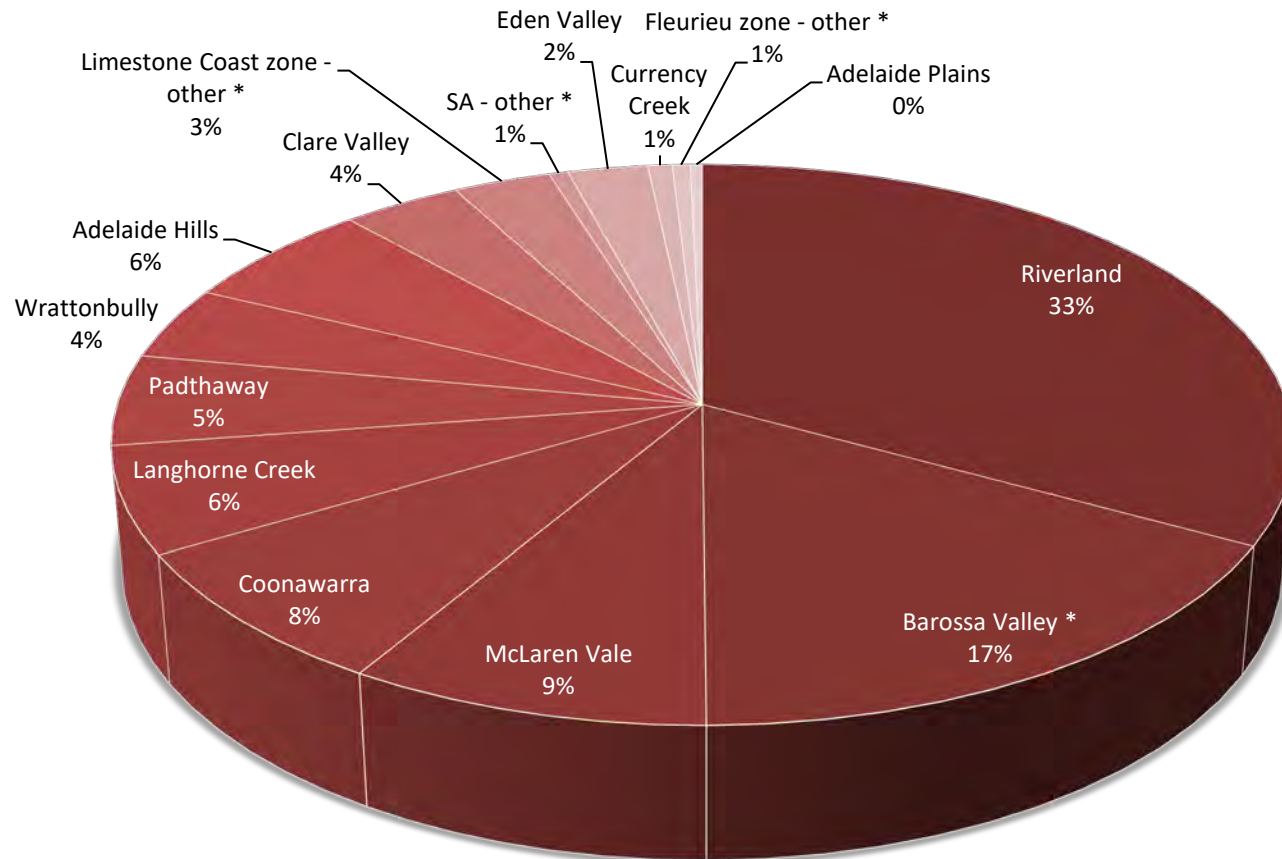
Share of crush volume by region 2021



*Inclusions as on page 8-9

State summary 2021

Share of crush value by region 2021



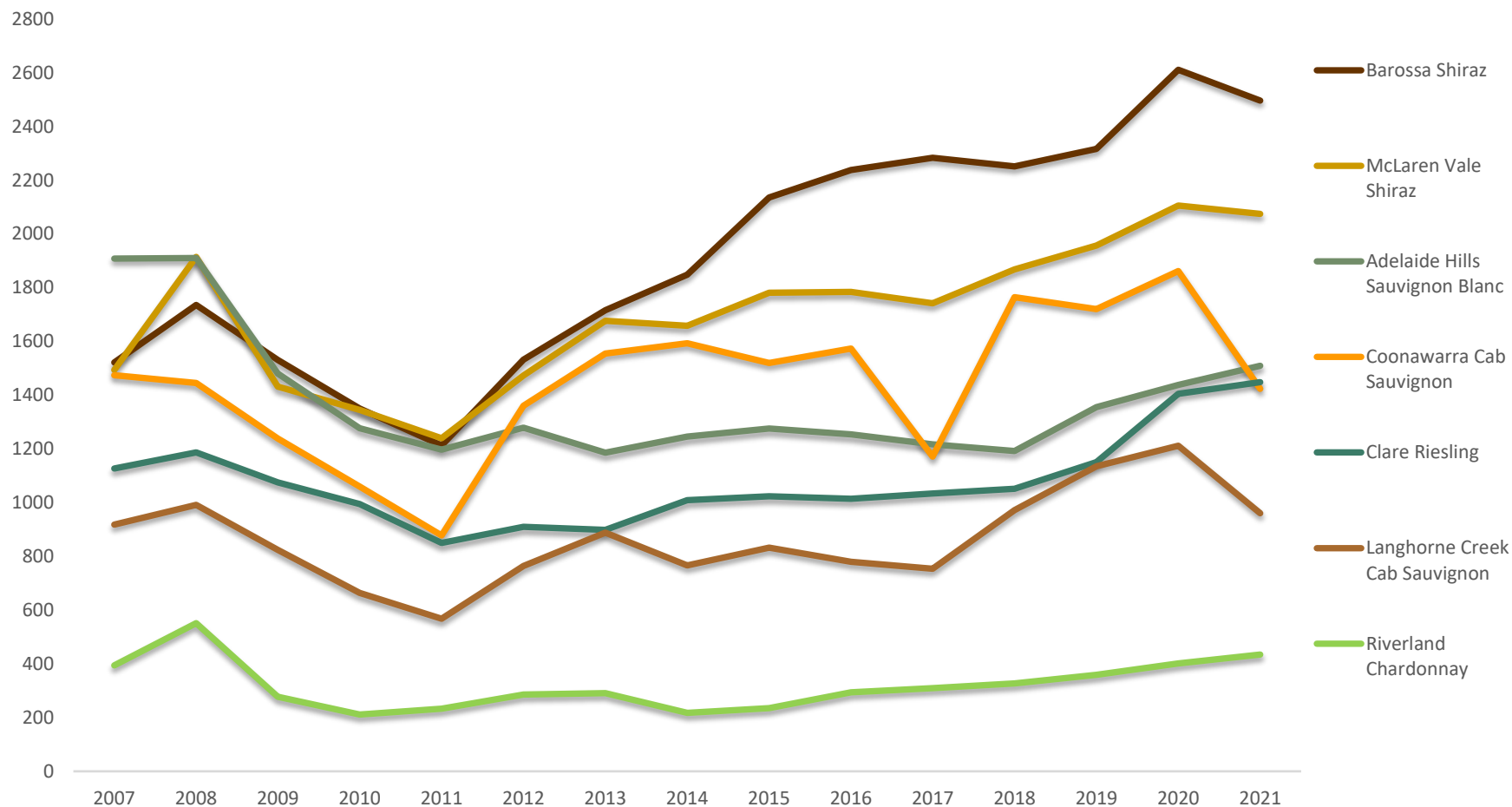
*Inclusions as on page 7-8

State summary 2021

Historical weighted average prices – 2007 - 2021

Average price (\$ per tonne)

Major variety-region combinations

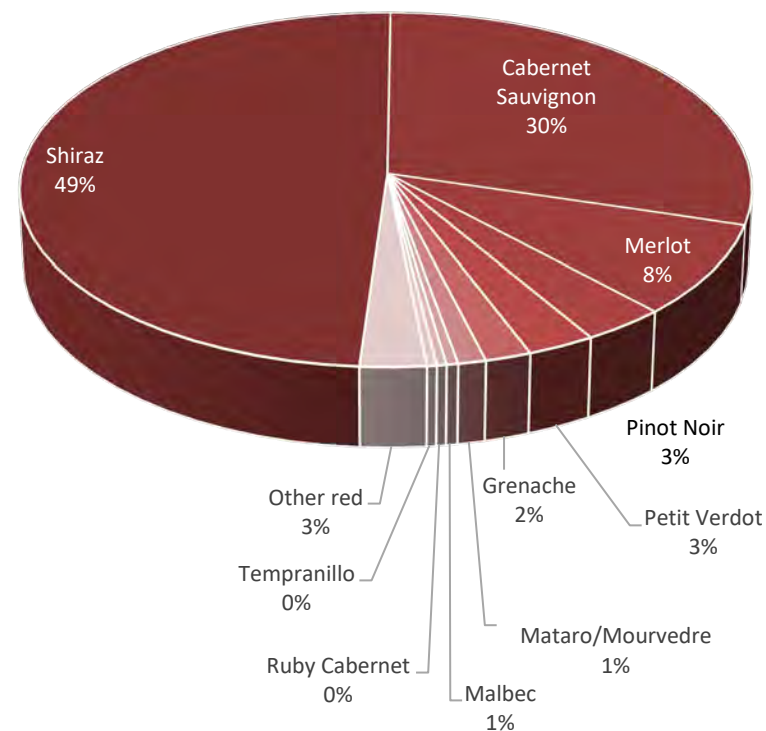


State summary 2021

Vintage summary by variety 2021 – red winegrapes

| Variety | Purchased (tonnes) | Winery grown (tonnes) | Total crush 2021 | Purchased as share of total |
|-------------------------------|-----------------------|-----------------------------|---------------------|-----------------------------------|
| Red | | | | |
| Barbera | 99 | 46 | 146 | 68% |
| Cabernet Franc | 205 | 519 | 725 | 28% |
| Cabernet Sauvignon | 109,141 | 73,744 | 182,885 | 60% |
| Durif | 843 | 1,291 | 2,134 | 40% |
| Graciano | 58 | 87 | 145 | 40% |
| Grenache | 8,001 | 3,565 | 11,566 | 69% |
| Lagrein | 94 | 24 | 117 | 80% |
| Malbec | 1,034 | 1,852 | 2,885 | 36% |
| Mataro/Mourvedre | 5,040 | 1,958 | 6,998 | 72% |
| Merlot | 30,109 | 22,198 | 52,307 | 58% |
| Montepulciano | 292 | 189 | 481 | 61% |
| Muscat à petits grains rouges | 216 | 29 | 245 | 88% |
| Nebbiolo | 60 | 91 | 151 | 40% |
| Nero d'Avola | 60 | 85 | 145 | 42% |
| Other red | 2,280 | 7,141 | 9,421 | 24% |
| Petit Verdot | 9,868 | 7,151 | 17,019 | 58% |
| Pinot Meunier | 270 | 9 | 279 | 97% |
| Pinot Noir | 16,624 | 4,327 | 20,951 | 79% |
| Ruby Cabernet | 1,303 | 1,135 | 2,438 | 53% |
| Sangiovese | 1,124 | 1,094 | 2,218 | 51% |
| Shiraz | 201,814 | 102,336 | 304,150 | 66% |
| Tempranillo | 1,551 | 882 | 2,434 | 64% |
| Touriga Nacional | 96 | 323 | 419 | 23% |
| Red Total | 390,183 | 230,076 | 620,259 | 63% |

Share of red crush by variety

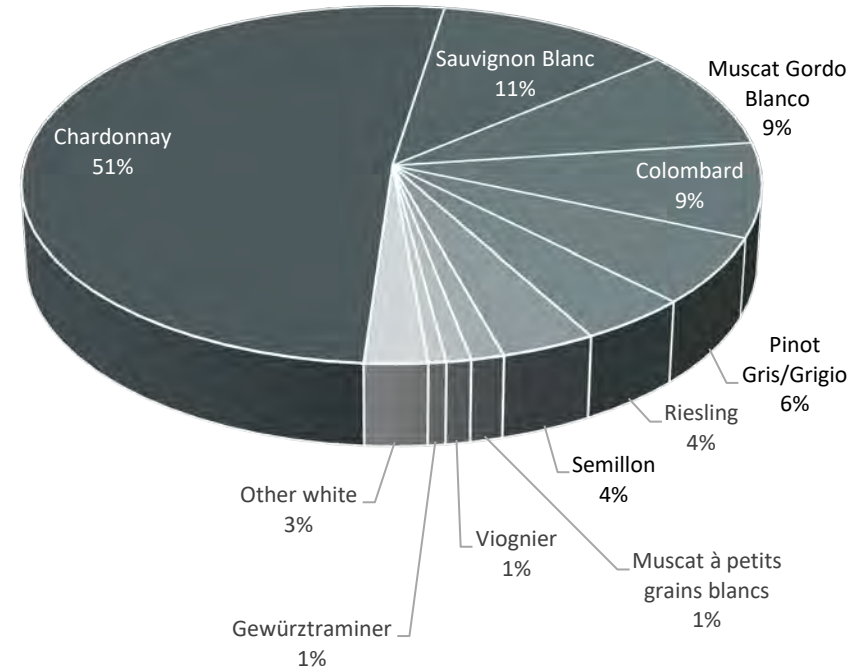


State summary 2021

Vintage summary by variety 2021 – white winegrapes

| Variety | Purchased (tonnes) | Winery grown (tonnes) | Total crush 2021 | Purchased as share of total |
|-------------------------------|-----------------------|-----------------------------|---------------------|-----------------------------------|
| White | | | | |
| Chardonnay | 129,209 | 35,643 | 164,852 | 78% |
| Chenin blanc | 1,787 | 33 | 1,820 | 98% |
| Colombard | 24,312 | 3,109 | 27,422 | 89% |
| Fiano | 239 | 184 | 423 | 57% |
| Gewürztraminer | 1,310 | 948 | 2,258 | 58% |
| Grüner Veltliner | 112 | 249 | 361 | 31% |
| Marsanne | 74 | 90 | 164 | 45% |
| Muscat à petits grains blancs | 3,537 | 662 | 4,198 | 84% |
| Muscat Gordo Blanco | 24,569 | 4,366 | 28,936 | 85% |
| Other white | 873 | 576 | 1,449 | 60% |
| Pinot Gris/Grigio | 13,825 | 5,790 | 19,614 | 70% |
| Prosecco | 534 | 62 | 596 | 90% |
| Riesling | 5,645 | 8,214 | 13,859 | 41% |
| Roussanne | 101 | 55 | 155 | 65% |
| Sauvignon Blanc | 27,613 | 8,953 | 36,566 | 76% |
| Semillon | 6,651 | 5,356 | 12,007 | 55% |
| Verdelho | 1,172 | 816 | 1,988 | 59% |
| Vermantino | 684 | 363 | 1,047 | 65% |
| Viognier | 2,422 | 716 | 3,138 | 77% |
| White Total | 244,669 | 76,185 | 320,854 | 76% |
| Grand Total | 634,852 | 306,261 | 941,113 | 67% |

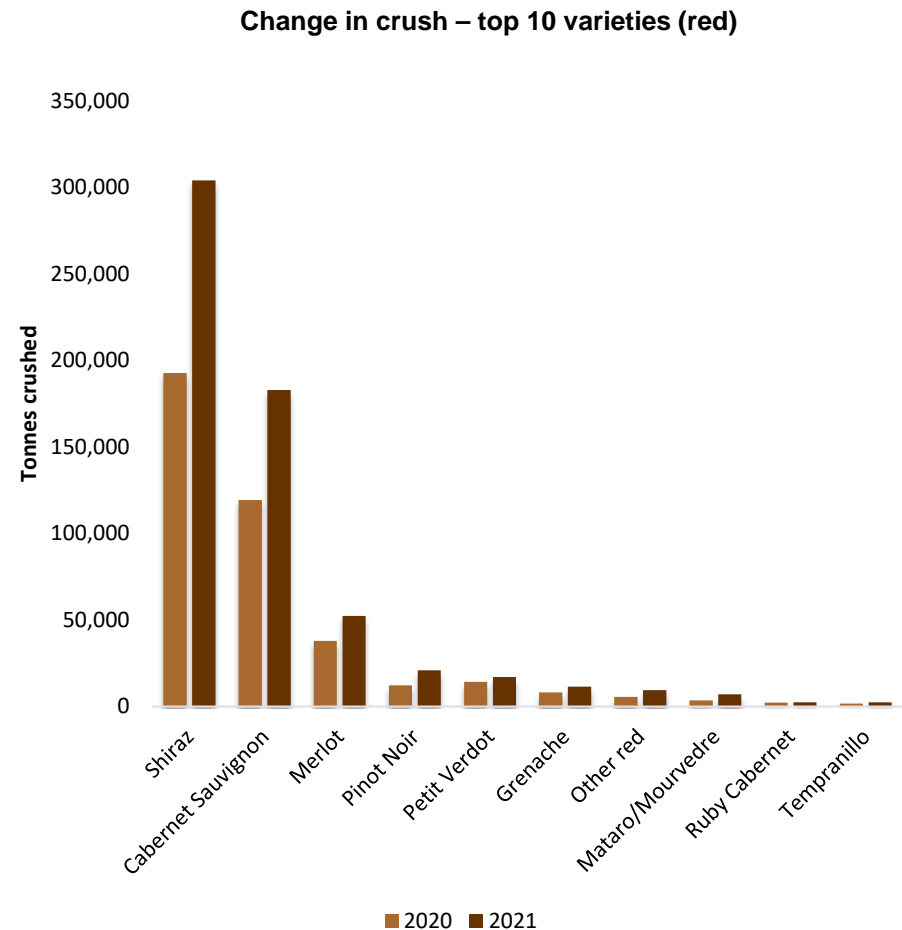
Share of white crush by variety



State summary 2021

Year-on-year comparison by variety 2020 vs 2021 – red winegrapes

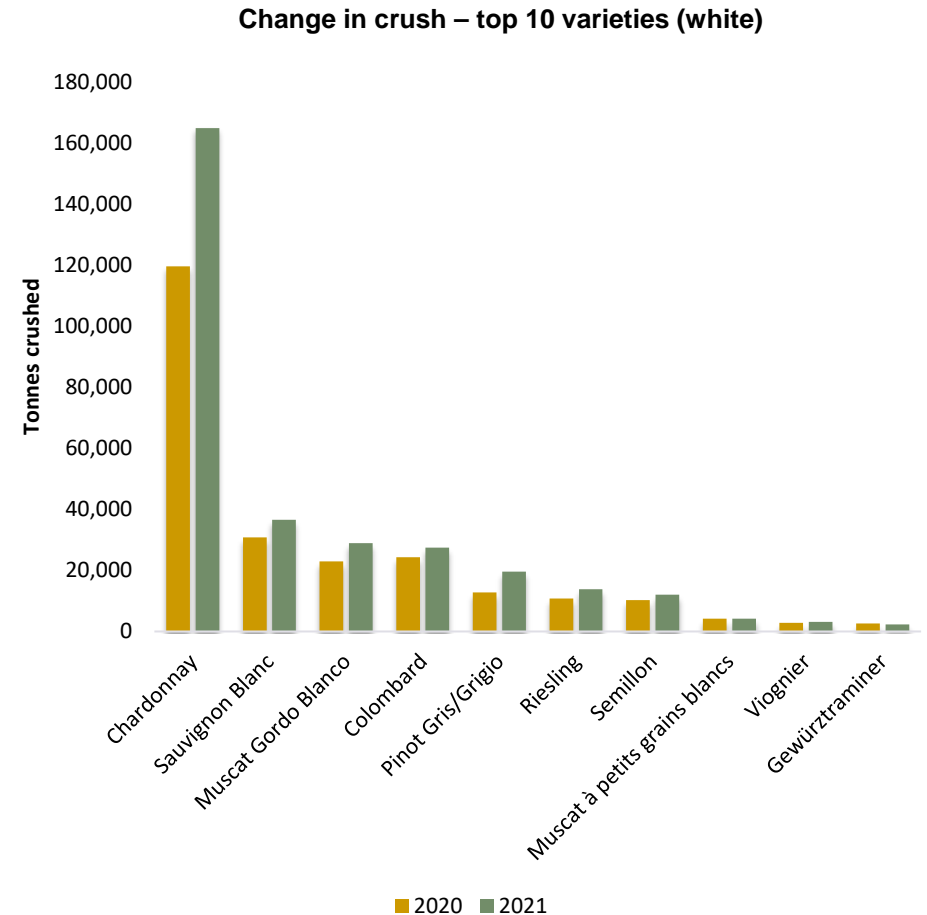
| | 2020 | 2021 | % change |
|-------------------------------|----------------|----------------|------------|
| Red | | | |
| Shiraz | 192,748 | 304,150 | 58% |
| Cabernet Sauvignon | 119,265 | 182,885 | 53% |
| Merlot | 37,999 | 52,307 | 38% |
| Pinot Noir | 12,183 | 20,951 | 72% |
| Petit Verdot | 14,319 | 17,019 | 19% |
| Grenache | 8,199 | 11,566 | 41% |
| Other red | 5,613 | 9,421 | 68% |
| Mataro/Mourvedre | 3,547 | 6,998 | 97% |
| Ruby Cabernet | 2,337 | 2,438 | 4% |
| Tempranillo | 1,813 | 2,434 | 34% |
| Malbec | 1,335 | 2,885 | 116% |
| Durif | 1,414 | 2,134 | 51% |
| Sangiovese | 1,236 | 2,218 | 79% |
| Cabernet Franc | 290 | 725 | 150% |
| Touriga Nacional | 271 | 419 | 55% |
| Montepulciano | 203 | 481 | 137% |
| Muscat à petits grains rouges | 237 | 245 | 3% |
| Pinot Meunier | 96 | 279 | 190% |
| Nebbiolo | 82 | 151 | 84% |
| Graciano | 87 | 145 | 68% |
| Barbera | 56 | 146 | 162% |
| Nero d'Avola | 45 | 145 | 223% |
| Lagrein | 50 | 117 | 134% |
| Red Total | 403,425 | 620,259 | 54% |



State summary 2021

Year-on-year comparison by variety 2020 vs 2021 – white winegrapes

| | 2020 | 2021 | % change |
|-------------------------------|----------------|----------------|------------|
| White | | | |
| Chardonnay | 119,606 | 164,852 | 38% |
| Sauvignon Blanc | 30,801 | 36,566 | 19% |
| Muscat Gordo Blanco | 22,894 | 28,936 | 26% |
| Colombard | 24,275 | 27,422 | 13% |
| Pinot Gris/Grigio | 12,775 | 19,614 | 54% |
| Riesling | 10,757 | 13,859 | 29% |
| Semillon | 10,297 | 12,007 | 17% |
| Muscat à petits grains blancs | 4,161 | 4,198 | 1% |
| Viognier | 2,765 | 3,138 | 14% |
| Gewürztraminer | 2,648 | 2,258 | -15% |
| Verdelho | 1,872 | 1,988 | 6% |
| Chenin blanc | 1,471 | 1,820 | 24% |
| Other white | 1,712 | 1,449 | -15% |
| Vermantino | 779 | 1,047 | 34% |
| Prosecco | 259 | 596 | 130% |
| Fiano | 318 | 423 | 33% |
| Grüner Veltliner | 252 | 361 | 43% |
| Marsanne | 63 | 164 | 159% |
| Roussanne | 64 | 155 | 142% |
| White Total | 247,770 | 320,854 | 29% |
| Grand Total | 651,195 | 941,113 | 45% |



State summary 2021

Current plantings by variety and year planted – red winegrapes

| Variety | Area (Hectares) | | | | | % planted in 2020 |
|-----------------------------|-----------------|------------|--------------|------------|---------------|-------------------|
| | Pre-2018 | 2018 | 2019 | 2020 | Total area | |
| Red winegrapes | | | | | | |
| Aglianico | 5 | 0 | 1 | 1 | 7 | 14% |
| Alicante Bouschet | 15 | 0 | 0 | 0 | 15 | 0% |
| Barbera | 22 | 0 | 0 | 0 | 22 | 0% |
| Cabernet Franc | 148 | 0 | 6 | 0 | 154 | 0% |
| Cabernet Sauvignon | 17,220 | 315 | 535 | 166 | 18,236 | 1% |
| Carignan | 12 | 1 | 0 | 0 | 13 | 0% |
| Cinsault | 7 | 2 | 0 | 0 | 9 | 0% |
| Dolcetto | 10 | 0 | 0 | 0 | 10 | 0% |
| Durif (Petite Sirah) | 63 | 4 | 1 | 0 | 68 | 0% |
| Gamay | 2 | 2 | 2 | 0 | 6 | 0% |
| Graciano | 13 | 0 | 0 | 1 | 14 | 7% |
| Grenache | 1,570 | 12 | 28 | 43 | 1,653 | 3% |
| Lagrein | 10 | 0 | 0 | 0 | 10 | 0% |
| Malbec | 359 | 5 | 7 | 2 | 373 | 1% |
| Mataro (Mourvedre) | 672 | 9 | 10 | 7 | 698 | 1% |
| Merlot | 3,674 | 25 | 16 | 2 | 3,717 | 0% |
| Meunier (Pinot Meunier) | 25 | 0 | 0 | 0 | 25 | 0% |
| Montepulciano | 41 | 5 | 3 | 0 | 49 | 0% |
| Muscat A Petit Grains Rouge | 3 | 0 | 0 | 0 | 3 | 0% |
| Nebbiolo | 16 | 2 | 2 | 0 | 20 | 0% |
| Nero D'Avola | 34 | 1 | 2 | 0 | 37 | 0% |
| Petit Verdot | 675 | 0 | 0 | 0 | 675 | 0% |
| Pinot Noir | 1,550 | 16 | 20 | 13 | 1,599 | 1% |
| Ruby Cabernet | 119 | 0 | 0 | 1 | 120 | 1% |
| Sagrantino | 9 | 0 | 0 | 0 | 9 | 0% |
| Sangiovese | 155 | 11 | 4 | 0 | 170 | 0% |
| Saperavi | 9 | 0 | 0 | 0 | 9 | 0% |
| Shiraz | 27,280 | 443 | 389 | 376 | 28,488 | 1% |
| Tannat | 2 | 0 | 0 | 0 | 2 | 0% |
| Tempranillo | 309 | 1 | 0 | 5 | 315 | 2% |
| Touriga | 41 | 2 | 1 | 0 | 44 | 0% |
| Zinfandel | 27 | 0 | 0 | 0 | 27 | 0% |
| Other Red | 386 | 9 | 7 | 3 | 405 | 1% |
| Total red varieties | 54,483 | 865 | 1,034 | 620 | 57,002 | 1% |

Source:
Vinehealth
Australia

State summary 2021

Current plantings by variety and year planted – white winegrapes and other grapes

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|--|---------------|--------------|--------------|------------|---------------|-------------------------|
| White winegrapes | | | | | | |
| Arneis | 7 | 0 | 0 | 0 | 7 | 0% |
| Chardonnay | 8,230 | 34 | 7 | 9 | 8,280 | 0% |
| Chenin Blanc | 101 | 0 | 0 | 0 | 101 | 0% |
| Colombard | 741 | 0 | 0 | 0 | 741 | 0% |
| Doradillo | 34 | 0 | 0 | 0 | 34 | 0% |
| Fiano | 57 | 2 | 11 | 4 | 74 | 5% |
| Gruner Veltliner | 20 | 0 | 0 | 0 | 20 | 0% |
| Marsanne | 8 | 1 | 0 | 0 | 9 | 0% |
| Muscadelle (Tokay) | 19 | 0 | 0 | 0 | 19 | 0% |
| Muscat A Petit Grains Blanc (White Frontignac) | 161 | 0 | 0 | 0 | 161 | 0% |
| Muscat Gordo Blanco | 853 | 0 | 0 | 1 | 854 | 0% |
| Palomino | 21 | 0 | 0 | 0 | 21 | 0% |
| Pedro Ximenez | 9 | 0 | 0 | 0 | 9 | 0% |
| Pinot Gris | 1,061 | 54 | 9 | 5 | 1,129 | 0% |
| Prosecco | 9 | 0 | 0 | 0 | 9 | 0% |
| Riesling | 2,264 | 6 | 9 | 10 | 2,289 | 0% |
| Roussanne | 14 | 1 | 0 | 0 | 15 | 0% |
| Sauvignon Blanc | 2,243 | 12 | 5 | 2 | 2,262 | 0% |
| Savagnin | 16 | 0 | 1 | 0 | 17 | 0% |
| Semillon | 749 | 0 | 0 | 0 | 749 | 0% |
| Sultana | 121 | 0 | 0 | 0 | 121 | 0% |
| Traminer (Gewurztraminer) | 155 | 0 | 0 | 2 | 157 | 1% |
| Trebbiano | 13 | 0 | 0 | 0 | 13 | 0% |
| Verdelho | 126 | 0 | 0 | 0 | 126 | 0% |
| Vermentino | 33 | 0 | 0 | 1 | 34 | 3% |
| Viognier | 294 | 0 | 0 | 0 | 294 | 0% |
| Other White | 289 | 8 | 5 | 3 | 305 | 1% |
| Total white varieties | 17,648 | 118 | 47 | 37 | 17,850 | 0% |
| Unknown variety | 956 | 95 | 60 | 4 | 1,115 | 0% |
| Rootstock | 40 | 2 | 0 | 0 | 42 | 0% |
| Multi-purpose red | 58 | 0 | 0 | 0 | 58 | 0% |
| Multi-purpose white | 27 | 5 | 0 | 0 | 32 | 0% |
| Table grapes - red | 27 | 0 | 0 | 0 | 27 | 0% |
| Table grapes - white | 35 | 16 | 0 | 0 | 51 | 0% |
| Total all varieties | 73,274 | 1,101 | 1,141 | 661 | 76,177 | 1% |

Source:
Vinehealth
Australia

State summary 2021

Current plantings by zone, region and year planted

| Zone | Region | Pre-2018 | 2018 | 2019 | 2020 | Total area (Ha) | Percent planted in 2020 |
|--------------------|-------------------------------------|---------------|--------------|--------------|------------|-----------------|-------------------------|
| Barossa | Barossa Valley | 11,194 | 186 | 116 | 119 | 11,615 | 1% |
| | Barossa zone - other | 233 | 0 | 0 | 2 | 235 | 1% |
| | Eden Valley | 2,253 | 38 | 89 | 9 | 2,389 | 0% |
| | Total for Barossa | 13,680 | 224 | 205 | 130 | 14,239 | 1% |
| Far North | Southern Flinders Ranges | 161 | 0 | 7 | 0 | 168 | 0% |
| | Total for Far North | 161 | 0 | 7 | 0 | 168 | 0% |
| Fleurieu | Currency Creek | 994 | 10 | 0 | 0 | 1,004 | 0% |
| | Fleurieu zone - other | 232 | 4 | 0 | 0 | 236 | 0% |
| | Kangaroo Island | 146 | 0 | 0 | 0 | 146 | 0% |
| | Langhorne Creek | 5,813 | 99 | 38 | 46 | 5,996 | 1% |
| | McLaren Vale | 7,189 | 80 | 60 | 85 | 7,414 | 1% |
| | Southern Fleurieu | 444 | 14 | 9 | 0 | 467 | 0% |
| | Total for Fleurieu | 14,818 | 207 | 107 | 131 | 15,263 | 1% |
| Limestone Coast | Coonawarra | 5,579 | 28 | 222 | 12 | 5,841 | 0% |
| | Limestone Coast zone - other | 1,839 | 0 | 0 | 3 | 1,842 | 0% |
| | Mount Benson | 492 | 7 | 0 | 9 | 508 | 2% |
| | Mount Gambier | 251 | 0 | 0 | 0 | 251 | 0% |
| | Padthaway | 3,730 | 93 | 118 | 190 | 4,131 | 5% |
| | Robe | 671 | 35 | 27 | 0 | 733 | 0% |
| | Wrattonbully | 2,585 | 12 | 114 | 2 | 2,713 | 0% |
| | Total for Limestone Coast | 15,147 | 175 | 481 | 216 | 16,019 | 1% |
| Lower Murray | Lower Murray zone - other | 391 | 2 | 12 | 0 | 405 | 0% |
| | Riverland | 19,815 | 369 | 231 | 77 | 20,492 | 0% |
| | Total for Lower Murray | 20,206 | 371 | 243 | 77 | 20,897 | 0% |
| Mount Lofty Ranges | Adelaide Hills | 3,612 | 64 | 19 | 30 | 3,725 | 1% |
| | Adelaide Plains | 386 | 0 | 2 | 1 | 389 | 0% |
| | Clare Valley | 4,863 | 56 | 68 | 65 | 5,052 | 1% |
| | Mount Lofty Ranges zone - other | 335 | 3 | 6 | 11 | 355 | 3% |
| | Total for Mount Lofty Ranges | 9,196 | 123 | 95 | 107 | 9,521 | 1% |
| The Peninsulas | The Peninsulas | 67 | 0 | 3 | 0 | 70 | 0% |
| | Total for The Peninsulas | 67 | 0 | 3 | 0 | 70 | 0% |
| | Total for all GIs | 73,274 | 1,101 | 1,141 | 661 | 76,177 | 1% |

Source:
Vinehealth
Australia

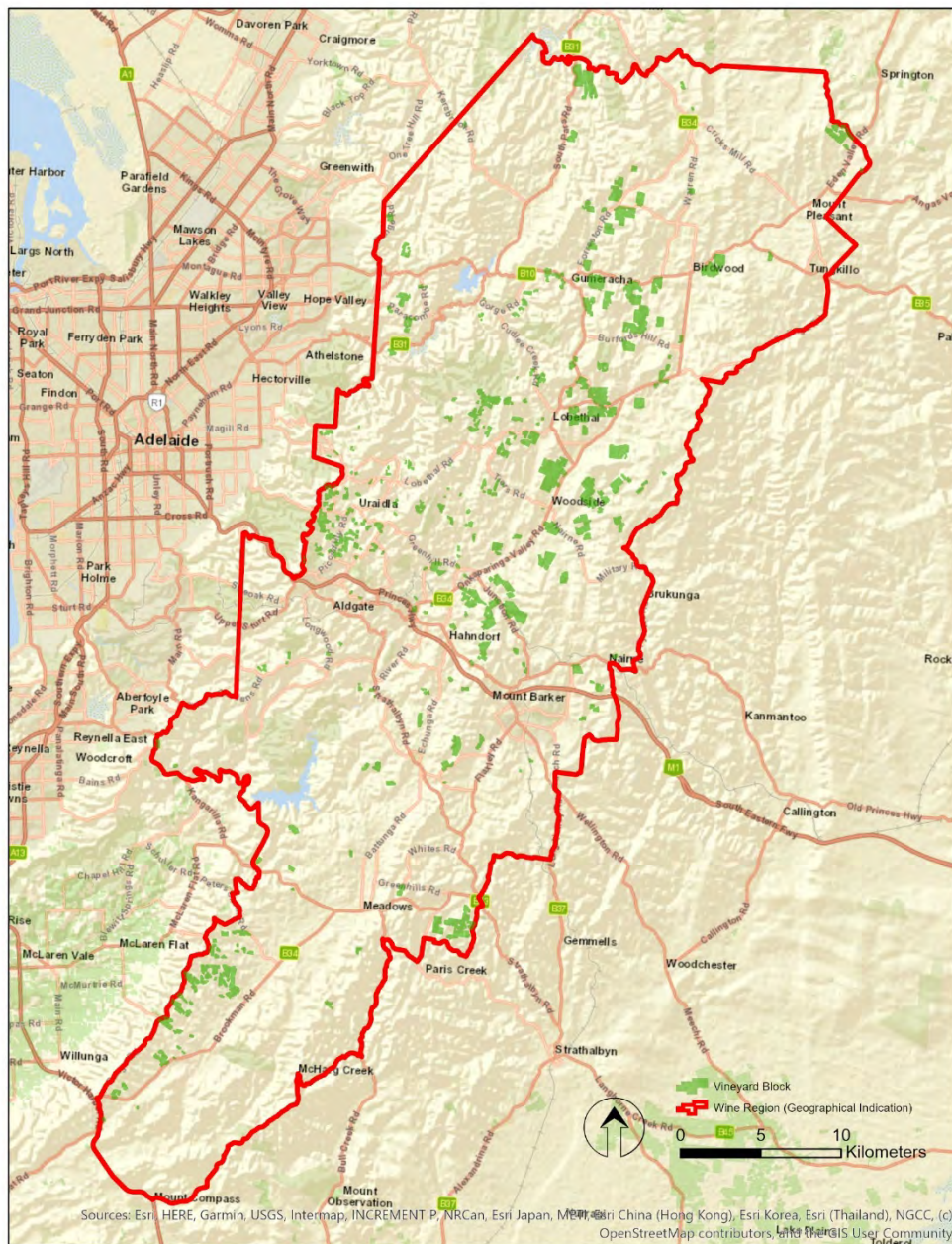
State summary 2021

Number of registered owners by region and property size

| Zone | Region | <10 ha | | 10-24 ha | | 25-49 ha | | 50-99 ha | | +100 ha | | Total | |
|-------------------------|------------------------------|-----------|------------------------|-----------|------------------------|-----------|------------------------|-----------|------------------------|-----------|------------------------|-----------|------------------------|
| | | Area (ha) | # of registered owners | Area (ha) | # of registered owners | Area (ha) | # of registered owners | Area (ha) | # of registered owners | Area (ha) | # of registered owners | Area (ha) | # of registered owners |
| Barossa | Barossa Valley | 1,331 | 333 | 2,397 | 148 | 2,348 | 69 | 1,540 | 23 | 3,999 | 15 | 11,615 | 588 |
| | Barossa zone - other | 17 | 3 | 12 | 1 | 0 | 0 | 81 | 1 | 126 | 1 | 235 | 6 |
| | Eden Valley | 391 | 90 | 529 | 35 | 350 | 11 | 367 | 5 | 753 | 3 | 2,389 | 144 |
| Far North | Southern Flinders | 13 | 5 | 103 | 6 | 0 | 0 | 51 | 1 | 0 | 0 | 168 | 12 |
| Fleurieu | Currency Creek | 53 | 10 | 181 | 12 | 154 | 4 | 65 | 1 | 551 | 2 | 1,004 | 29 |
| | Fleurieu zone - other | 23 | 8 | 43 | 3 | 0 | 0 | 170 | 2 | 0 | 0 | 236 | 13 |
| | Kangaroo Island | 108 | 20 | 38 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 146 | 23 |
| | Langhorne Creek | 92 | 20 | 330 | 20 | 799 | 23 | 994 | 15 | 3,781 | 14 | 5,996 | 92 |
| | McLaren Vale | 1,516 | 355 | 1,781 | 113 | 1,321 | 41 | 925 | 13 | 1,872 | 8 | 7,414 | 530 |
| | Southern Fleurieu | 93 | 30 | 55 | 5 | 227 | 6 | 92 | 1 | 0 | 0 | 467 | 42 |
| Limestone Coast | Coonawarra | 270 | 47 | 554 | 34 | 585 | 17 | 968 | 14 | 3,465 | 9 | 5,841 | 121 |
| | Limestone Coast zone - other | 50 | 12 | 66 | 4 | 66 | 2 | 202 | 3 | 1,458 | 6 | 1,842 | 27 |
| | Mount Benson | 24 | 4 | 84 | 5 | 27 | 1 | 212 | 3 | 161 | 1 | 508 | 14 |
| | Mount Gambier | 51 | 16 | 22 | 2 | 80 | 2 | 98 | 1 | 0 | 0 | 251 | 21 |
| | Padthaway | 8 | 1 | 79 | 5 | 315 | 8 | 799 | 10 | 2,929 | 12 | 4,131 | 36 |
| | Robe | 8 | 1 | 41 | 2 | 81 | 2 | 54 | 1 | 549 | 3 | 733 | 9 |
| | Wrattonbully | 84 | 14 | 243 | 14 | 522 | 13 | 446 | 6 | 1,417 | 5 | 2,713 | 52 |
| Lower Murray | Lower Murray zone - other | 53 | 14 | 191 | 10 | 161 | 5 | 0 | 0 | 0 | 0 | 405 | 29 |
| | Riverland | 2,453 | 517 | 4,115 | 264 | 2,864 | 82 | 2,573 | 36 | 8,487 | 33 | 20,492 | 932 |
| Mount Lofty Ranges | Adelaide Hills | 731 | 189 | 932 | 55 | 944 | 29 | 844 | 12 | 274 | 2 | 3,725 | 287 |
| | Adelaide Plains | 125 | 41 | 83 | 6 | 181 | 4 | 0 | 0 | 0 | 0 | 389 | 51 |
| | Clare Valley | 617 | 169 | 713 | 43 | 824 | 23 | 747 | 10 | 2,152 | 12 | 5,052 | 257 |
| | Mount Lofty Ranges | 83 | 26 | 60 | 4 | 104 | 3 | 0 | 0 | 108 | 1 | 355 | 34 |
| The Peninsulas | The Peninsulas | 16 | 4 | 21 | 2 | 33 | 1 | 0 | 0 | 0 | 0 | 70 | 7 |
| Totals by size category | | 8,209 | 1,929 | 12,674 | 796 | 11,986 | 346 | 11,229 | 158 | 32,079 | 127 | | |
| Totals for SA | | | | | | | | | | | | 76,177 | 3,246 |

Note: registered vineyard owners can have vineyards in multiple regions. The total number of registered owners is therefore lower than the sum of the category totals for number of registered owners as the grand total only counts each owner once.

Source: Vinehealth Australia



SA Winegrape Crush Survey 2021

Regional Summary Report

Adelaide Hills Wine Region

Wine Australia July 2021

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

Adelaide Hills Wine Region



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Adelaide Hills

Vintage overview

VINTAGE REPORT

Vintage 2021 was welcomed by grape growers and winemakers in the Adelaide Hills for both its long cool ripening and a return to respectable crop loads after the previous two vintages were affected by extreme conditions at flowering resulting in poor set. In addition, Vintage 2020 was impacted by the Cudlee Creek fire in late December 2019 where there was significant fire damage to 20% of the vineyards in the region and pockets of smoke damage in some vineyards.

Grapevines are resilient plants and the low cropping levels of the previous season enabled vines to develop flower primordia, in lieu of crop, ready for the 2020/21 growing season. Despite a dry July prior to budburst (29% of Long-Term Average [LTA] rainfall), soil moisture levels were close to fill point as budburst commenced. Warm conditions in September ensured even budburst and LTA rainfall from late September through to November promoted ideal canopy development and maturing of flower primordia. Unlike the previous two seasons, conditions at flowering allowed good set of grapes.

The summer of the 2020/21 growing season was the coolest in the past ten seasons with a daily average temperature of 17.2°C, 1.2°C below the LTA. There were no heat waves and only nine days over 35°C (including one day over 40°C). Several good rain periods in late January / early February ensured satisfactory soil moisture levels in preparation for veraison and optimal conditions for berry development. The final stages of ripening were slowed by cool temperatures resulting in ideal conditions for flavour development. Harvest dates for dry red wines were similar to those of the 1980/90s. Disease pressure was low as growing season rainfall was 79% of the long-term average and early season management practices are well understood.

*Richard Hamilton, Hamilton Viticulture Pty Ltd
On behalf of Adelaide Hills Wine Region Inc.*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Adelaide Hills winegrapes in 2021 was 29,991 tonnes, up 149 per cent compared with the 2020 crush of 12,049 tonnes and the largest reported crush since 2008. Over the past five years (up to 2020), the average crush for the Adelaide Hills has been 22,631 tonnes, making this year's crush 33 per cent above the five-year average.

There were 101 respondents to the survey who reported crushing grapes from the Adelaide Hills in 2021, compared with 72 in 2020.

The total value of winegrapes in 2021 increased by \$32 million (164 per cent) to \$51.5 million as a result of the increased production combined with an overall increase in the average purchase value of grapes, which was up by 6 per cent from \$1626 to \$1718 per tonne.

There were increases in average prices for the three largest varieties: Pinot Noir up by 7 per cent to \$1994 per tonne, Sauvignon Blanc up 5 per cent to \$1510 per tonne and Chardonnay up by 5 per cent to \$1768 per tonne.

The price dispersion data shows an upward shift in prices paid, with 75 per cent of all grapes being purchased at \$1500 per tonne or above compared with 65 per cent in 2020.

There were 30 hectares of new vines planted in the region in the 2020–21 season compared with 19 hectares in the previous season. The plantings were predominantly split between the major varieties Pinot Noir and Chardonnay.

The total vineyard area in the Adelaide Hills as at 30 April 2021 is 3725 hectares – a small net reduction (35 hectares) since 2020 and 93 hectares less than the total area five years ago.

Adelaide Hills

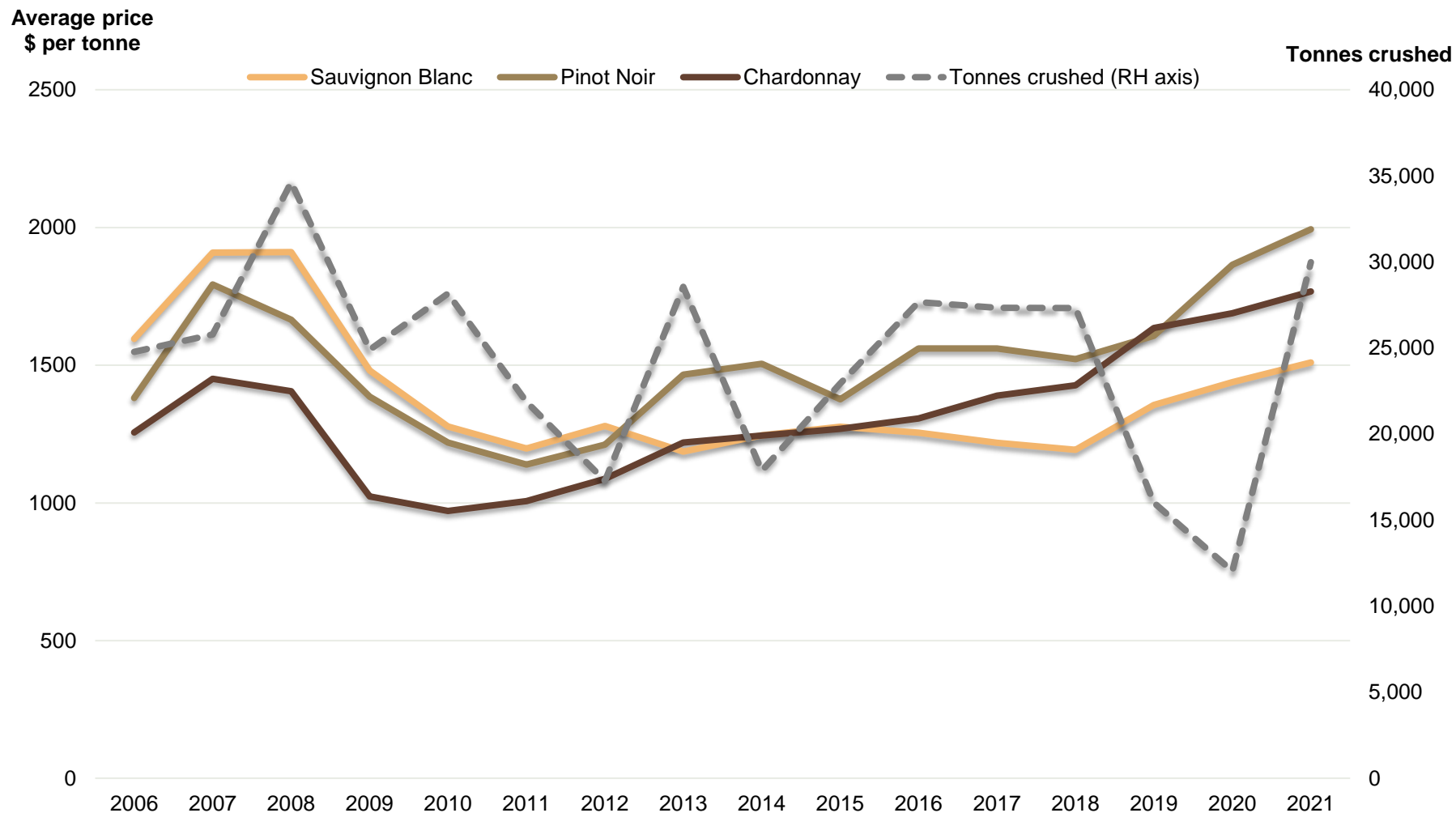
Winegrape intake summary table

| Variety | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|-------------------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Barbera | 27 | \$60,371 | \$2,264 | 0% | 32 | 55% | 59 | \$133,383 |
| Cabernet Franc | 5 | | | | 46 | 90% | 52 | \$82,578 |
| Cabernet Sauvignon | 652 | \$1,005,350 | \$1,541 | -5% | 639 | 49% | 1,292 | \$1,990,549 |
| Grenache | 1 | | | | | | 1 | \$1,924 |
| Lagrein | | | | | 5 | 100% | 5 | \$6,803 |
| Malbec | 5 | | | | | | 5 | \$8,517 |
| Mataro/Mourvedre | | | | | 8 | 100% | 8 | \$14,781 |
| Merlot | 749 | \$713,712 | \$953 | -11% | 26 | 3% | 776 | \$738,912 |
| Montepulciano | 29 | \$60,466 | \$2,100 | 0% | | | 29 | \$60,466 |
| Nebbiolo | 30 | \$62,211 | \$2,042 | 0% | 70 | 70% | 100 | \$205,149 |
| Nero d'Avola | 14 | | | | | | 14 | \$23,189 |
| Petit Verdot | 14 | | | | | | 14 | \$19,140 |
| Pinot Meunier | 175 | \$345,610 | \$1,978 | 4% | | | 175 | \$345,610 |
| Pinot Noir | 5,065 | \$10,099,854 | \$1,994 | 7% | 991 | 16% | 6,056 | \$12,075,772 |
| Sangiovese | 62 | \$120,580 | \$1,960 | 22% | 6 | 9% | 68 | \$133,121 |
| Shiraz | 1,133 | \$2,267,631 | \$2,002 | -2% | 1,065 | 48% | 2,198 | \$4,400,749 |
| Tempranillo | 145 | \$276,201 | \$1,906 | -4% | 53 | 27% | 198 | \$377,170 |
| Other red | 41 | \$82,816 | \$2,024 | -5% | 35 | 46% | 76 | \$116,140 |
| Red Total | 8,147 | \$15,155,890 | \$1,860 | 3% | 2,979 | 27% | 11,126 | \$20,733,953 |
| White | | | | | | | | |
| Chardonnay | 5,600 | \$9,899,232 | \$1,768 | 5% | 1,188 | 18% | 6,788 | \$12,000,261 |
| Fiano | 2 | | | | 2 | 60% | 4 | \$9,336 |
| Gewürztraminer | 53 | \$63,423 | \$1,196 | 0% | 11 | 17% | 64 | \$76,074 |
| Grüner Veltliner | 107 | \$210,428 | \$1,972 | -2% | 137 | 56% | 244 | \$480,719 |
| Muscat à petits grains blancs | 10 | | | | | | 10 | \$5,736 |
| Pinot Gris/Grigio | 1,999 | \$3,339,694 | \$1,671 | 17% | 752 | 27% | 2,751 | \$4,596,926 |
| Prosecco | 12 | | | | 47 | 80% | 59 | \$73,678 |
| Riesling | 291 | \$461,213 | \$1,584 | -22% | 87 | 23% | 378 | \$599,508 |
| Roussanne | 5 | | | | | | 5 | \$10,332 |
| Sauvignon Blanc | 5,977 | \$9,027,220 | \$1,510 | 5% | 2,221 | 27% | 8,198 | \$12,382,120 |
| Semillon | 103 | \$133,593 | \$1,301 | 22% | 103 | 50% | 206 | \$267,809 |
| Vermentino | 12 | | | | | | 12 | \$15,223 |
| Viognier | 20 | \$24,433 | \$1,208 | 3% | 16 | 44% | 36 | \$43,659 |
| Other white | 43 | \$75,791 | \$1,774 | 5% | 68 | 61% | 110 | \$204,270 |
| White Total | 14,231 | \$23,284,760 | \$1,636 | 8% | 4,633 | 25% | 18,864 | \$30,765,650 |
| Grand Total | 22,379 | \$38,440,650 | \$1,718 | 6% | 7,612 | 25% | 29,991 | \$51,499,603 |

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

Adelaide Hills

Historical weighted average price vs tonnes crushed



Adelaide Hills

Price dispersion – purchased grapes

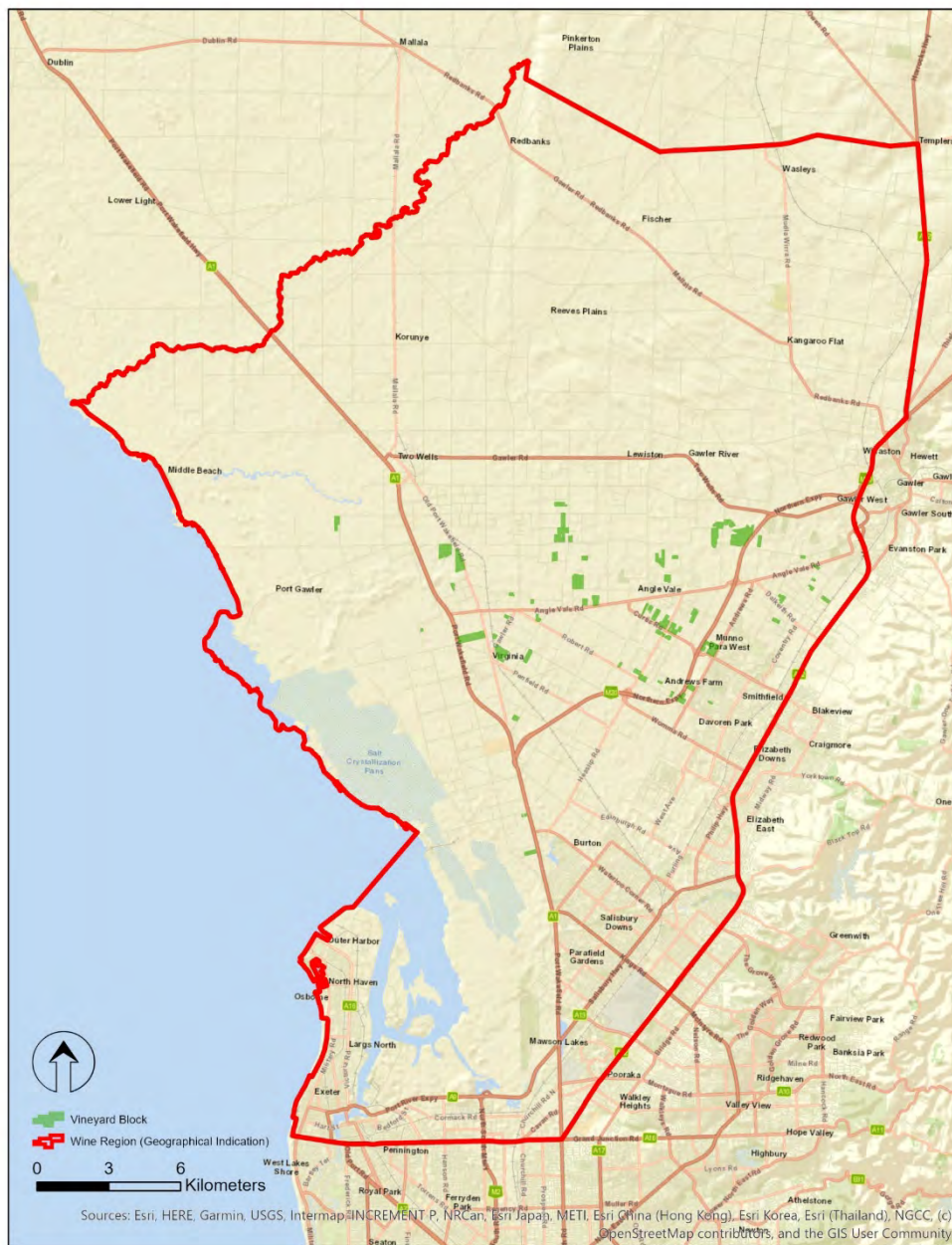
| Tonnes purchased in each price segment | | | | | | |
|--|--------|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | Total tonnes purchased |
| Red | | | | | | |
| Barbera | | | 1 | | 26 | 27 |
| Cabernet Franc | | | | 5 | | 5 |
| Cabernet Sauvignon | | | 156 | 397 | 100 | 652 |
| Grenache | | | 1 | | | 1 |
| Malbec | | | | 5 | | 5 |
| Merlot | | 506 | 131 | 104 | 9 | 749 |
| Montepulciano | | | | | 29 | 29 |
| Nebbiolo | | | | | 30 | 30 |
| Nero d'Avola | | | | 14 | | 14 |
| Petit Verdot | | | 6 | 8 | | 14 |
| Pinot Meunier | | | | 143 | 32 | 175 |
| Pinot Noir | | | 457 | 2,161 | 2,448 | 5,065 |
| Sangiovese | | | 3 | 37 | 22 | 62 |
| Shiraz | | | 128 | 399 | 606 | 1,133 |
| Tempranillo | | | 22 | 55 | 68 | 145 |
| Other red | 1 | | | 13 | 27 | 41 |
| Red Total | 1 | 506 | 905 | 3,339 | 3,397 | 8,147 |
| White | | | | | | |
| Chardonnay | 182 | | 518 | 3,668 | 1,232 | 5,600 |
| Fiano | | | | | 2 | 2 |
| Gewürztraminer | | 33 | 4 | 8 | 8 | 53 |
| Grüner Veltliner | | | 1 | 52 | 54 | 107 |
| Muscat à petits grains blancs | | 10 | | | | 10 |
| Pinot Gris/Grigio | | | 472 | 1,318 | 208 | 1,999 |
| Prosecco | | | 12 | | | 12 |
| Riesling | | | 135 | 48 | 108 | 291 |
| Roussanne | | | | | 5 | 5 |
| Sauvignon Blanc | | 44 | 2,605 | 3,035 | 292 | 5,977 |
| Semillon | | | 85 | 15 | 3 | 103 |
| Vermentino | | | 12 | | | 12 |
| Viognier | | | 18 | 2 | | 20 |
| Other white | | | 7 | 16 | 20 | 43 |
| White Total | 182 | 87 | 3,869 | 8,162 | 1,932 | 14,231 |
| Total purchased | 183 | 592 | 4,774 | 11,502 | 5,328 | 22,378 |

Adelaide Hills

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|--------------|-----------|-----------|-----------|--------------|-------------------|
| Red winegrapes | | | | | | |
| Barbera | 6 | 0 | 0 | 0 | 6 | 0% |
| Cabernet Franc | 6 | 0 | 0 | 0 | 6 | 0% |
| Cabernet Sauvignon | 204 | 2 | 0 | 0 | 206 | 0% |
| Dolcetto | 2 | 0 | 0 | 0 | 2 | 0% |
| Gamay | 2 | 2 | 2 | 0 | 6 | 0% |
| Grenache | 2 | 0 | 0 | 0 | 2 | 0% |
| Malbec | 2 | 0 | 0 | 1 | 3 | 33% |
| Merlot | 135 | 0 | 0 | 0 | 135 | 0% |
| Meunier (Pinot Meunier) | 21 | 0 | 0 | 0 | 21 | 0% |
| Montepulciano | 5 | 0 | 0 | 0 | 5 | 0% |
| Nebbiolo | 11 | 2 | 1 | 0 | 13 | 0% |
| Nero d'Avola | 2 | 1 | 0 | 0 | 3 | 0% |
| Pinot Noir | 646 | 13 | 8 | 11 | 678 | 2% |
| Sangiovese | 13 | 1 | 0 | 0 | 14 | 0% |
| Shiraz | 362 | 20 | 3 | 2 | 387 | 1% |
| Tempranillo | 33 | 0 | 0 | 0 | 34 | 0% |
| Other Red | 15 | 1 | 0 | 0 | 16 | 0% |
| Total red varieties | 1,467 | 42 | 14 | 14 | 1,537 | 1% |
| White winegrapes | | | | | | |
| Arneis | 7 | 0 | 0 | 0 | 7 | 0% |
| Chardonnay | 794 | 5 | 4 | 7 | 810 | 1% |
| Fiano | 7 | 2 | 0 | 0 | 9 | 0% |
| Gruener Veltliner | 20 | 0 | 0 | 0 | 20 | 0% |
| Pinot Gris | 246 | 5 | 0 | 2 | 253 | 1% |
| Prosecco | 9 | 0 | 0 | 0 | 9 | 0% |
| Riesling | 53 | 1 | 0 | 1 | 55 | 2% |
| Sauvignon Blanc | 891 | 0 | 0 | 0 | 891 | 0% |
| Savagnin | 5 | 0 | 1 | 0 | 6 | 0% |
| Semillon | 31 | 0 | 0 | 0 | 31 | 0% |
| Traminer (Gewurztraminer) | 20 | 0 | 0 | 2 | 22 | 9% |
| Viognier | 18 | 0 | 0 | 0 | 18 | 0% |
| Other White | 16 | 1 | 0 | 0 | 17 | 0% |
| Total white varieties | 2,116 | 14 | 5 | 12 | 2,147 | 1% |
| Rootstock Block | 2 | 0 | 0 | 0 | 2 | 0% |
| Unknown variety | 27 | 8 | 0 | 4 | 39 | 10% |
| Table grapes | 0 | 0 | 0 | 0 | 0 | 0% |
| Total all varieties | 3,612 | 64 | 19 | 30 | 3,725 | 1% |

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2021

Regional Summary Report

Adelaide Plains Wine Region

Wine Australia July 2021

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

Adelaide Plains Wine Region



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Adelaide Plains

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 202 | \$190,249 | \$942 | -11% | | | 202 | \$190,249 |
| Grenache | 93 | | | | | | 93 | \$89,053 |
| Mataro/Mourvedre | 71 | | | | | | 71 | \$128,088 |
| Merlot | 88 | \$79,544 | \$909 | 3% | | | 88 | \$79,544 |
| Pinot Noir | 91 | | | | | | 91 | \$78,050 |
| Shiraz | 1,570 | \$1,728,556 | \$1,101 | -3% | | | 1,570 | \$1,728,556 |
| Tempranillo | 10 | | | | | | 10 | \$13,208 |
| Red Total | 2,125 | \$2,306,748 | \$1,086 | -0% | | | 2,125 | \$2,306,748 |
| White | | | | | | | | |
| Chardonnay | 155 | \$151,184 | \$973 | 0% | | | 155 | \$151,184 |
| Pinot Gris/Grigio | 364 | \$398,552 | \$1,095 | 0% | | | 364 | \$398,552 |
| Sauvignon Blanc | 222 | \$214,039 | \$965 | -3% | | | 222 | \$214,039 |
| Viognier | 40 | | | | | | 40 | \$55,468 |
| White Total | 781 | \$819,243 | \$1,049 | -1% | | | 781 | \$819,243 |
| Grand Total | 2,905 | \$3,125,991 | \$1,076 | -0% | | | 2,905 | \$3,125,991 |

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

Adelaide Plains

Price dispersion – purchased grapes

| | Tonnes purchased in each price segment | | | Total tonnes purchased |
|--------------------|--|---------------|----------------|------------------------|
| Varieties | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | |
| Red | | | | |
| Cabernet Sauvignon | 83 | 116 | 2 | 202 |
| Grenache | | 93 | | 93 |
| Mataro/Mourvedre | | | 71 | 71 |
| Merlot | 54 | 33 | | 88 |
| Pinot Noir | 38 | 53 | | 91 |
| Shiraz | 375 | 915 | 281 | 1,570 |
| Tempranillo | | 10 | | 10 |
| Red Total | 550 | 1,221 | 354 | 2,125 |
| White | | | | |
| Chardonnay | 68 | 87 | | 155 |
| Pinot Gris/Grigio | 25 | 339 | | 364 |
| Sauvignon Blanc | 25 | 197 | | 222 |
| Viognier | | 40 | | 40 |
| White Total | 118 | 663 | | 781 |
| Total purchased | 668 | 1,884 | 354 | 2,905 |

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

Adelaide Plains

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|----------|----------|----------|------------|-------------------------|
| Red winegrapes | | | | | | |
| Shiraz | 165 | 0 | 0 | 1 | 166 | 1% |
| Cabernet Sauvignon | 49 | 0 | 2 | 0 | 51 | 0% |
| Grenache | 20 | 0 | 0 | 0 | 20 | 0% |
| Merlot | 19 | 0 | 0 | 0 | 19 | 0% |
| Pinot Noir | 13 | 0 | 0 | 0 | 13 | 0% |
| Mataro (Mourvedre) | 7 | 0 | 0 | 0 | 7 | 0% |
| Sangiovese | 5 | 0 | 0 | 0 | 5 | 0% |
| Other Red | 13 | 0 | 0 | 0 | 13 | 0% |
| Total red varieties | 291 | 0 | 2 | 1 | 294 | 0% |
| White winegrapes | | | | | | |
| Pinot Gris | 32 | 0 | 0 | 0 | 32 | 0% |
| Chardonnay | 26 | 0 | 0 | 0 | 26 | 0% |
| Sauvignon Blanc | 16 | 0 | 0 | 0 | 16 | 0% |
| Colombard | 1 | 0 | 0 | 0 | 1 | 0% |
| Riesling | 1 | 0 | 0 | 0 | 1 | 0% |
| Other White | 7 | 0 | 0 | 0 | 7 | 0% |
| Total white varieties | 83 | 0 | 0 | 0 | 83 | 0% |
| Unknown variety | 12 | 0 | 0 | 0 | 12 | 0% |
| Total all varieties | 386 | 0 | 2 | 1 | 389 | 0% |

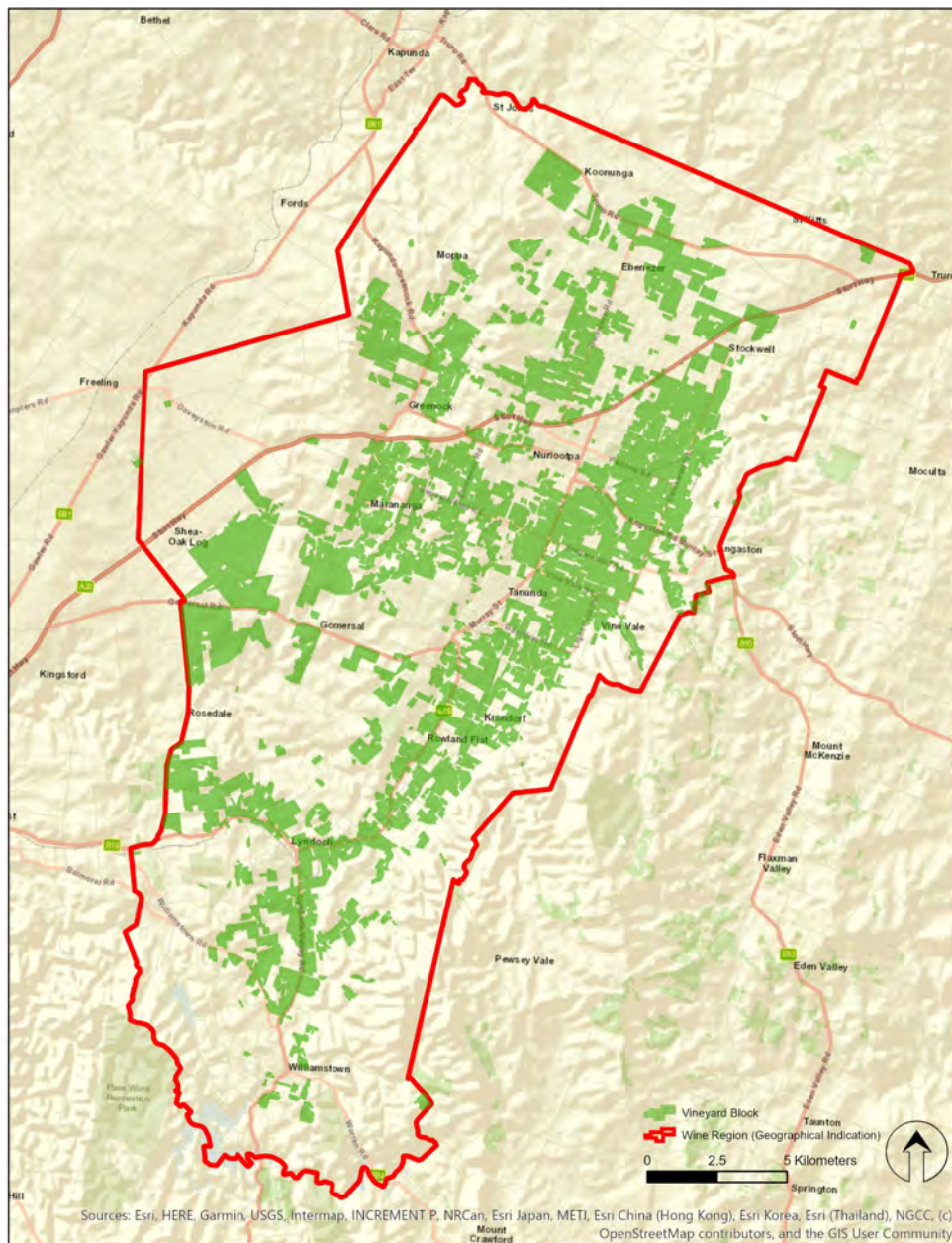
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Barossa Valley Wine Region

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 29 November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Barossa Valley
Wine Region



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Barossa Valley

Vintage overview

VINTAGE REPORT

Following two particularly dry seasons, many were hoping for Mother Nature to be much kinder in 2020–21, and mostly she was. Winter rainfall in 2020 was 148mm, the same as winter 2019, (22% below average). The calendar year of 2020 recorded 455.8mm, 160mm higher than 2019.

Some frost damage occurred on the 27th September, when temperatures plunged to -0.3°C. However, many varieties were only just emerging and widespread damage thankfully was avoided.

November recorded 4 days above 35°C pushing the monthly maximum temperature to 28°C, 4°C warmer than previous years. However, conditions throughout summer were relatively mild with December recording its lowest maximum temperature since 2014. Cool, dewy mornings and maximum temperatures below 30°C for the majority of January provided optimal ripening conditions.

Conditions were quite favourable during flowering, allowing bunches to set and good fruit development. Veraison started in late January-early February and the cooler conditions and some rain in early February helped to plump up berries and provide some relief to soil moisture profiles.

Whilst yield varied between vineyards, it was welcome relief to achieve close to average crops in comparison to the last two seasons.

Vintage was less compressed than in previous years and it was much easier to source labour than first feared. Harvest continued well into April as the dry Indian summer continued to ripen the grapes.

Quality is exceptional across the varieties and styles from 2021. Reds have intense, rich and balanced flavours and colours; whites have lovely aromatics, finesse and great natural acidity.

Brooke Howell and Louisa Rose (Yalumba) on behalf of Barossa Grape & Wine Association.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Barossa Valley winegrapes (including Barossa zone – other) was 61,410 tonnes in 2021, up by 111 per cent from the record low 2020 reported crush of 29,069 tonnes. Over the past five years (up to 2020), the average crush for the Barossa Valley has been 51,535 tonnes, making this year's crush 19 per cent above the five-year average.

There were 88 respondents to the survey who reported crushing grapes from the Barossa Valley in 2021, compared with 82 in 2020.

The total estimated value of winegrapes in 2021 was just under \$140 million compared with \$67 million in 2020. The higher production was enhanced by a small overall increase in the average purchase value of grapes, which increased by 2 per cent from \$2228 to \$2263 per tonne.

The major red varieties declined in average value, with the exception of Grenache, which was up 7 per cent to \$2361 per tonne. Shiraz decreased by 4 per cent to \$2497 per tonne while Cabernet Sauvignon was down 3 per cent to \$2246 per tonne.

The price dispersion data shows a slight downward shift, with 66 per cent of all varieties purchased at \$2000 and above, compared with 75 per cent in 2020.

According to Vinehealth Australia data, the total vineyard area in the Barossa Valley as at 30 April 2021 was 11,850 hectares, including 235 hectares in Barossa zone – other. This is about 500 hectares more than it was 5 years ago.

There were 121 hectares of new vines planted in the region in the 2020-21 season (including top-working and replacements). There were 26 hectares of Grenache planted – a 4 per cent increase in area.

Barossa Valley

Barossa Valley* winegrape intake summary table – red varieties

* Includes Barossa zone other – 1336 tonnes

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|-------------------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Barbera | 4 | | | | | | 4 | \$8,718 |
| Cabernet Franc | 60 | \$90,218 | \$1,497 | 7% | 7 | 11% | 67 | \$100,935 |
| Cabernet Sauvignon | 4,529 | \$10,161,318 | \$2,243 | -3% | 4,042 | 47% | 8,571 | \$19,213,655 |
| Durif | 81 | \$177,053 | \$2,183 | 8% | 11 | 12% | 92 | \$200,300 |
| Graciano | 21 | \$43,571 | \$2,097 | 34% | 26 | 56% | 47 | \$98,980 |
| Grenache | 1,834 | \$4,329,685 | \$2,361 | 7% | 732 | 29% | 2,566 | \$6,058,650 |
| Malbec | 33 | \$68,815 | \$2,056 | 3% | 71 | 68% | 105 | \$215,512 |
| Mataro/Mourvedre | 1,097 | \$2,376,223 | \$2,166 | -5% | 682 | 38% | 1,780 | \$3,854,075 |
| Merlot | 410 | \$581,034 | \$1,416 | -2% | 738 | 64% | 1,148 | \$1,617,325 |
| Montepulciano | 55 | \$109,197 | \$1,976 | -34% | 76 | 58% | 131 | \$258,870 |
| Muscat à petits grains rouges | 6 | | | | 22 | 80% | 28 | \$22,344 |
| Nebbiolo | 2 | | | | 3 | 63% | 5 | \$6,854 |
| Nero d'Avola | 2 | | | | 25 | 94% | 26 | \$63,645 |
| Petit Verdot | 23 | \$42,905 | \$1,887 | 0% | 88 | 79% | 111 | \$209,091 |
| Pinot Noir | 103 | \$88,838 | \$866 | -0% | | | 103 | \$88,838 |
| Sangiovese | 310 | \$445,816 | \$1,437 | 4% | 39 | 11% | 350 | \$502,205 |
| Shiraz | 22,350 | \$55,796,227 | \$2,497 | -4% | 18,834 | 46% | 41,183 | \$101,828,428 |
| Tempranillo | 275 | \$525,613 | \$1,912 | -5% | 110 | 28% | 384 | \$735,110 |
| Touriga Nacional | 8 | | | | 104 | 93% | 112 | \$193,445 |
| Other red | 324 | \$478,815 | \$1,476 | -7% | 205 | 39% | 529 | \$806,568 |
| Red Total | 31,527 | \$75,349,315 | \$2,390 | -3% | 25,815 | 45% | 57,342 | \$136,083,548 |

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

Barossa Valley

Barossa Valley* winegrape intake summary table – white varieties

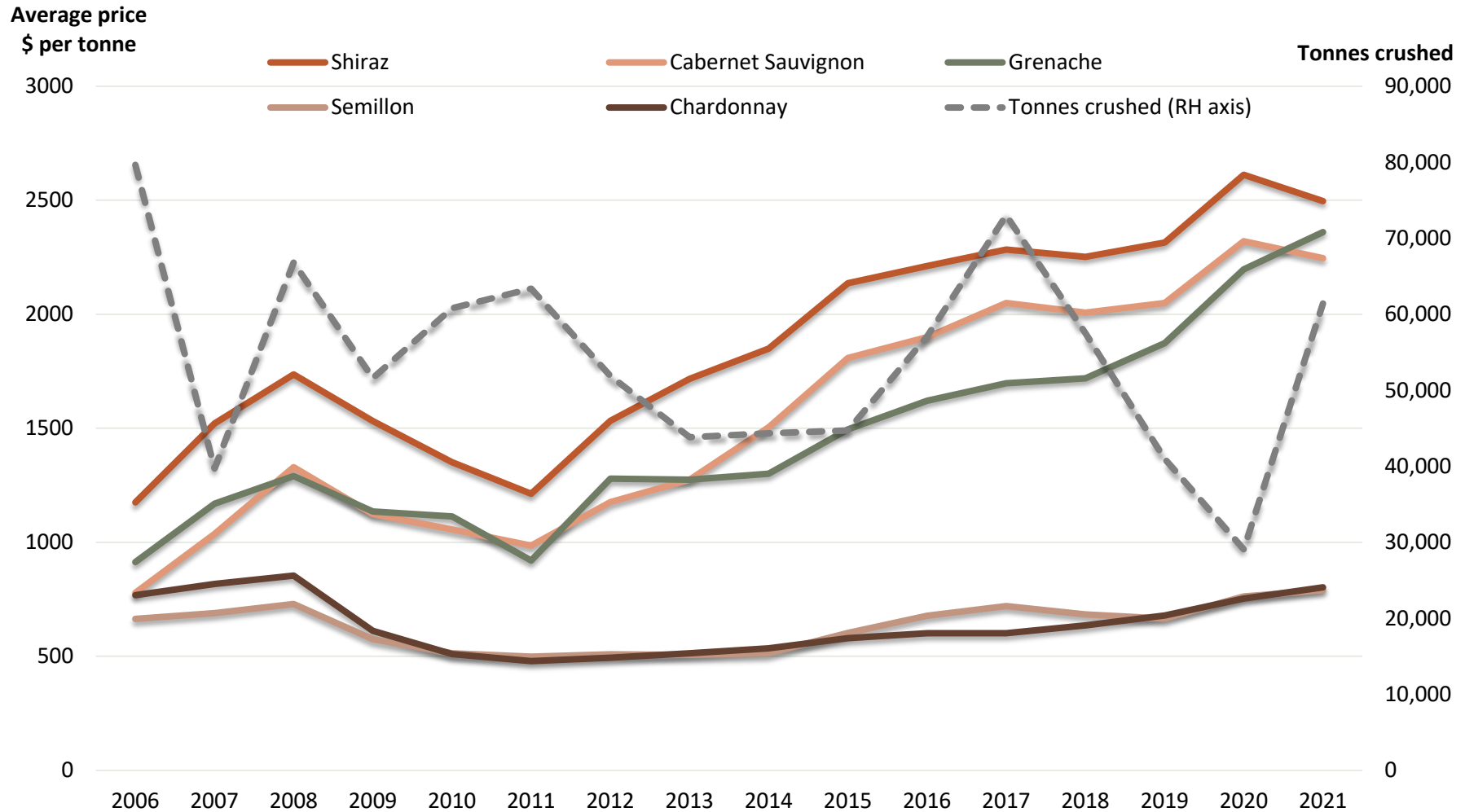
* Includes Barossa zone other – 56 tonnes

| Varieties | Tonnes purchased | Average | | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|-------------------------------|------------------|-----------------------|--------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| | | Total value purchased | purchase value per tonne | | | | | |
| White | | | | | | | | |
| Chardonnay | 851 | \$685,139 | \$805 | 7% | 331 | 28% | 1,182 | \$951,012 |
| Chenin blanc | 13 | | | | | | 13 | \$18,944 |
| Fiano | | | | | 24 | 100% | 24 | \$39,604 |
| Gewürztraminer | 17 | | | | 0 | 0% | 17 | \$12,765 |
| Marsanne | 13 | \$22,995 | \$1,771 | 16% | 33 | 72% | 46 | \$82,195 |
| Muscat à petits grains blancs | 113 | \$121,519 | \$1,073 | -2% | 83 | 42% | 196 | \$210,504 |
| Pinot Gris/Grigio | 148 | \$158,613 | \$1,068 | -1% | 86 | 37% | 234 | \$250,118 |
| Riesling | 327 | \$319,660 | \$978 | 10% | 80 | 20% | 407 | \$402,758 |
| Roussanne | 15 | \$25,904 | \$1,781 | 4% | 7 | 31% | 21 | \$37,622 |
| Sauvignon Blanc | 204 | | | | 29 | 12% | 233 | \$217,384 |
| Semillon | 935 | \$738,734 | \$790 | 3% | 239 | 20% | 1,174 | \$927,762 |
| Vernmentino | 82 | \$79,312 | \$973 | 1% | 10 | 11% | 91 | \$88,759 |
| Viognier | 316 | \$431,710 | \$1,365 | 1% | 22 | 7% | 338 | \$461,856 |
| Other white | 33 | \$57,253 | \$1,745 | -1% | 58 | 64% | 91 | \$157,264 |
| White Total | 3,067 | \$2,863,145 | \$933 | 5% | 1,001 | 25% | 4,068 | \$3,858,548 |
| Grand Total | 34,594 | \$78,212,460 | \$2,261 | 1% | 26,816 | 44% | 61,410 | \$139,942,096 |

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

Barossa Valley

Historical weighted average price vs tonnes crushed



Barossa Valley

Price dispersion – purchased grapes

| Varieties | Tonnes purchased by price segment | | | | | Total tonnes purchased |
|-------------------------------|-----------------------------------|--------------|---------------|----------------|---------|------------------------|
| | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | | |
| Barbera | | | | | 4 | 4 |
| Cabernet Franc | | | 40 | 10 | 10 | 60 |
| Cabernet Sauvignon | | | 23 | 1,740 | 2,767 | 4,529 |
| Durif | | | | 12 | 69 | 81 |
| Graciano | | | | 13 | 8 | 21 |
| Grenache | | 0 | 20 | 278 | 1,535 | 1,834 |
| Malbec | | | 2 | | 32 | 33 |
| Mataro/Mourvedre | | | 13 | 160 | 924 | 1,097 |
| Merlot | 5 | | 208 | 131 | 66 | 410 |
| Montepulciano | | | | 29 | 27 | 55 |
| Muscat à petits grains rouges | | 5 | | 0 | | 6 |
| Nebbiolo | | | | 2 | | 2 |
| Nero d'Avola | | | | | 2 | 2 |
| Petit Verdot | | | | 16 | 7 | 23 |
| Pinot Noir | | 90 | 12 | | | 103 |
| Sangiovese | | | 249 | 49 | 13 | 310 |
| Shiraz | | | 73 | 4,903 | 17,374 | 22,350 |
| Tempranillo | | | | 217 | 57 | 275 |
| Touriga Nacional | | | | 8 | | 8 |
| Other red | | | 214 | 53 | 57 | 324 |
| Red Total | 5 | 96 | 853 | 7,621 | 22,952 | 31,527 |
| White | | | | | | |
| Chardonnay | | 656 | 194 | 1 | | 851 |
| Chenin blanc | | 3 | | 10 | | 13 |
| Gewürztraminer | | 17 | | | | 17 |
| Marsanne | | | | 6 | 7 | 13 |
| Muscat à petits grains blancs | | 26 | 86 | | 1 | 113 |
| Pinot Gris/Grigio | | 54 | 95 | | | 148 |
| Riesling | | 99 | 192 | 36 | | 327 |
| Roussanne | | | | 10 | 5 | 15 |
| Sauvignon Blanc | 4 | 5 | 195 | | | 204 |
| Semillon | 67 | 677 | 162 | 25 | 5 | 935 |
| Vernmentino | | | 78 | 4 | | 82 |
| Viognier | | 9 | 261 | 39 | 7 | 316 |
| Other white | | 8 | 1 | 9 | 14 | 33 |
| White Total | 71 | 1,555 | 1,262 | 141 | 39 | 3,067 |
| Total purchased | 75 | 1,651 | 2,115 | 7,762 | 22,991 | 34,594 |

Barossa Valley

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

** Includes Barossa zone other – 225 hectares*

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|-----------------------------|---------------|------------|------------|------------|---------------|-------------------|
| Red winegrapes | | | | | | |
| Aglianico | 2 | 0 | 0 | 0 | 2 | 0% |
| Alicante Bouschet | 15 | 0 | 0 | 0 | 15 | 0% |
| Barbera | 3 | 0 | 0 | 0 | 3 | 0% |
| Cabernet Franc | 24 | 0 | 0 | 0 | 24 | 0% |
| Cabernet Sauvignon | 1,567 | 39 | 28 | 41 | 1,675 | 2% |
| Carignan | 8 | 0 | 0 | 0 | 8 | 0% |
| Cinsault | 4 | 2 | 0 | 0 | 6 | 0% |
| Durif (Petite Sirah) | 20 | 0 | 1 | 0 | 21 | 0% |
| Graciano | 8 | 0 | 0 | 0 | 8 | 0% |
| Grenache | 624 | 8 | 21 | 26 | 679 | 4% |
| Malbec | 25 | 2 | 0 | 1 | 28 | 4% |
| Mataro (Mourvedre) | 285 | 7 | 7 | 7 | 306 | 2% |
| Merlot | 270 | 0 | 0 | 0 | 270 | 0% |
| Meunier (Pinot Meunier) | 2 | 0 | 0 | 0 | 2 | 0% |
| Montepulciano | 13 | 2 | 1 | 0 | 16 | 0% |
| Muscat A Petit Grains Rouge | 1 | 0 | 0 | 0 | 1 | 0% |
| Nebbiolo | 2 | 0 | 1 | 0 | 3 | 0% |
| Nero d'Avola | 8 | 0 | 0 | 0 | 8 | 0% |
| Petit Verdot | 19 | 0 | 0 | 0 | 19 | 0% |
| Pinot Noir | 31 | 0 | 0 | 0 | 31 | 0% |
| Sagrantino | 2 | 0 | 0 | 0 | 2 | 0% |
| Sangiovese | 28 | 0 | 0 | 0 | 28 | 0% |
| Saperavi | 6 | 0 | 0 | 0 | 6 | 0% |
| Shiraz | 7,401 | 122 | 53 | 44 | 7,620 | 1% |
| Tannat | 2 | 0 | 0 | 0 | 2 | 0% |
| Tempranillo | 85 | 0 | 0 | 1 | 86 | 1% |
| Touriga | 15 | 2 | 0 | 0 | 17 | 0% |
| Zinfandel | 13 | 0 | 0 | 0 | 13 | 0% |
| Other Red | 13 | 0 | 1 | 0 | 14 | 0% |
| Total red varieties | 10,496 | 184 | 113 | 120 | 10,913 | 1% |

Source:
Vinehealth
Australia

Barossa Valley

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

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

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|--|---------------|------------|------------|------------|---------------|-------------------------|
| White winegrapes | | | | | | |
| Chardonnay | 249 | 0 | 0 | 0 | 249 | 0% |
| Chenin Blanc | 12 | 0 | 0 | 0 | 12 | 0% |
| Fiano | 3 | 0 | 1 | 0 | 4 | 0% |
| Marsanne | 8 | 1 | 0 | 0 | 9 | 0% |
| Muscadelle (Tokay) | 11 | 0 | 0 | 0 | 11 | 0% |
| Muscat A Petit Grains Blanc (White Frontignac) | 43 | 0 | 0 | 0 | 43 | 0% |
| Palomino | 13 | 0 | 0 | 0 | 13 | 0% |
| Pedro Ximenez | 5 | 0 | 0 | 0 | 5 | 0% |
| Pinot Gris | 13 | 0 | 0 | 0 | 13 | 0% |
| Riesling | 124 | 0 | 0 | 0 | 124 | 0% |
| Roussanne | 2 | 1 | 0 | 0 | 3 | 0% |
| Sauvignon Blanc | 39 | 0 | 0 | 0 | 39 | 0% |
| Semillon | 251 | 0 | 0 | 0 | 251 | 0% |
| Traminer (Gewurztraminer) | 5 | 0 | 0 | 0 | 5 | 0% |
| Vermentino | 8 | 0 | 0 | 0 | 8 | 0% |
| Viognier | 50 | 0 | 0 | 0 | 50 | 0% |
| Other White | 17 | 0 | 2 | 1 | 20 | 6% |
| Total white varieties | 853 | 2 | 3 | 1 | 859 | 0% |
| Unknown variety | 75 | 0 | 0 | 0 | 75 | 0% |
| Table grapes | 1 | 0 | 0 | 0 | 1 | 0% |
| Rootstock | 2 | 0 | 0 | 0 | 2 | 0% |
| Total all varieties | 11,427 | 186 | 116 | 121 | 11,850 | 1% |

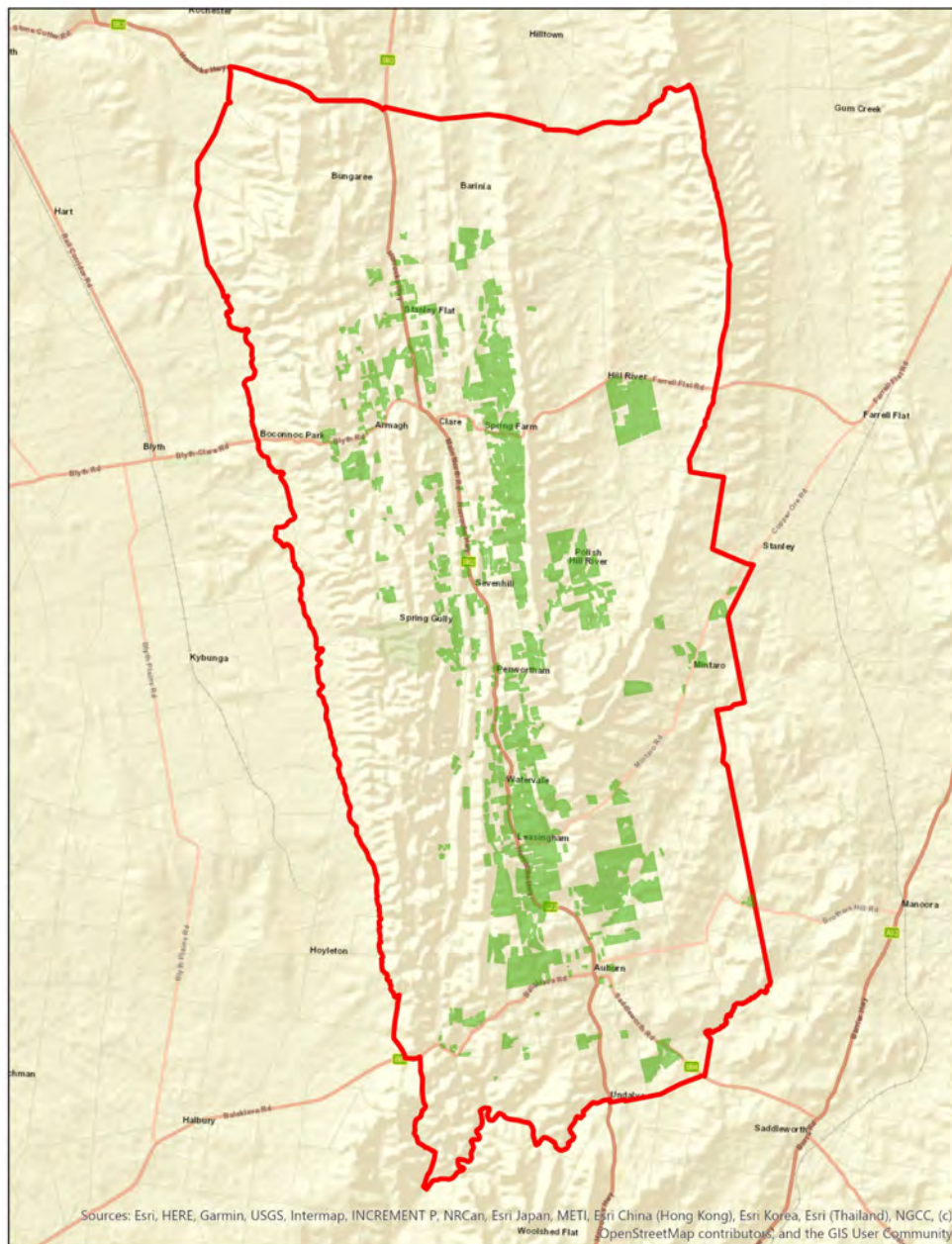
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Clare Valley Wine Region

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: Esri ArcGIS v10.7.1
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 2021 vintage has been described by local winemakers as classic Clare with cool and dry conditions producing solid yields and fruit with great varietal character and natural acidity.

Good late-winter and early-spring rains led to an even budburst, good early canopy growth and contributed to mitigating frost damage. Dry conditions prevailed from November onwards, with rainfall well below average for the remainder of the growing season.

Weather conditions from mid to late November were ideal for flowering and good fruit set was achieved. Bunch number, bunch size and berry size were higher than crop estimates in most varieties, with overall yields the best since 2018 with early indications that total yield for the region is slightly below average.

Riesling bunch and berry sizes were lower than average which reduced yields of this variety. In comparison, yields of the red varieties have rebounded significantly this year, following extremely low yields during the drought years.

Low disease pressure continued all season, with wineries reporting spray programs with as few as four applications. The cool growing season, with only one day of real heat in late January, resulted in minimal sunburn. While the growing season was mainly dry, there was a small rain event which caused some minor split and shrivel, mainly in the Riesling.

Despite the lack of international winery workers this year and challenges recruiting vintage workers, wineries did not report shortages in staffing. This was aided by the spread-out nature of the vintage with some wineries operating on only one shift for the whole vintage.

*Anna Baum, Executive Officer
Clare Valley Wine & Grape Association*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Clare Valley winegrapes was 19,857 tonnes, up by 66 per cent on the 2020 crush of 11,946 tonnes and almost identical to the 5-year average of 19,847 tonnes (2016–2020).

There were 44 respondents to the survey who reported crushing grapes from the Clare Valley in 2021, compared with 42 in 2020.

The total estimated value of winegrapes in 2021 was just over \$31 million compared with \$19 million in 2020. The higher production was partly offset by a small decrease in the average purchase value of grapes, which was down by 4 per cent from \$1562 in 2020 to \$1503 per tonne.

The average value of red varieties declined overall by 10 per cent, driven by Shiraz, which was down by 10 per cent to \$1773 per tonne, while Cabernet Sauvignon decreased by 8 per cent to \$1604 per tonne. In the whites, Riesling was up by 3 per cent to \$1449 per tonne, Pinot Gris/Grigio increased by 2 per cent to \$1297 per tonne and Chardonnay increased by 1 per cent to \$1045 per tonne.

The price dispersion data shows a small downward shift in prices paid, with 10 per cent of grapes being purchased at \$2000 per tonne and above, compared with 17 per cent in 2020.

According to Vinehealth Australia data, the total vineyard area in the Clare Valley as at 30 April 2021 was 5052 hectares, almost identical to the 2020 figure, but about 150 hectares less than it was in 2016.

There were 65 hectares of new vines planted in the region in the 2020-21 season (including top-working and replacements), with two-thirds being Shiraz. There were 9 hectares of Grenache planted – the first since before 2018 – increasing the area of this variety by 12 per cent.

Clare Valley

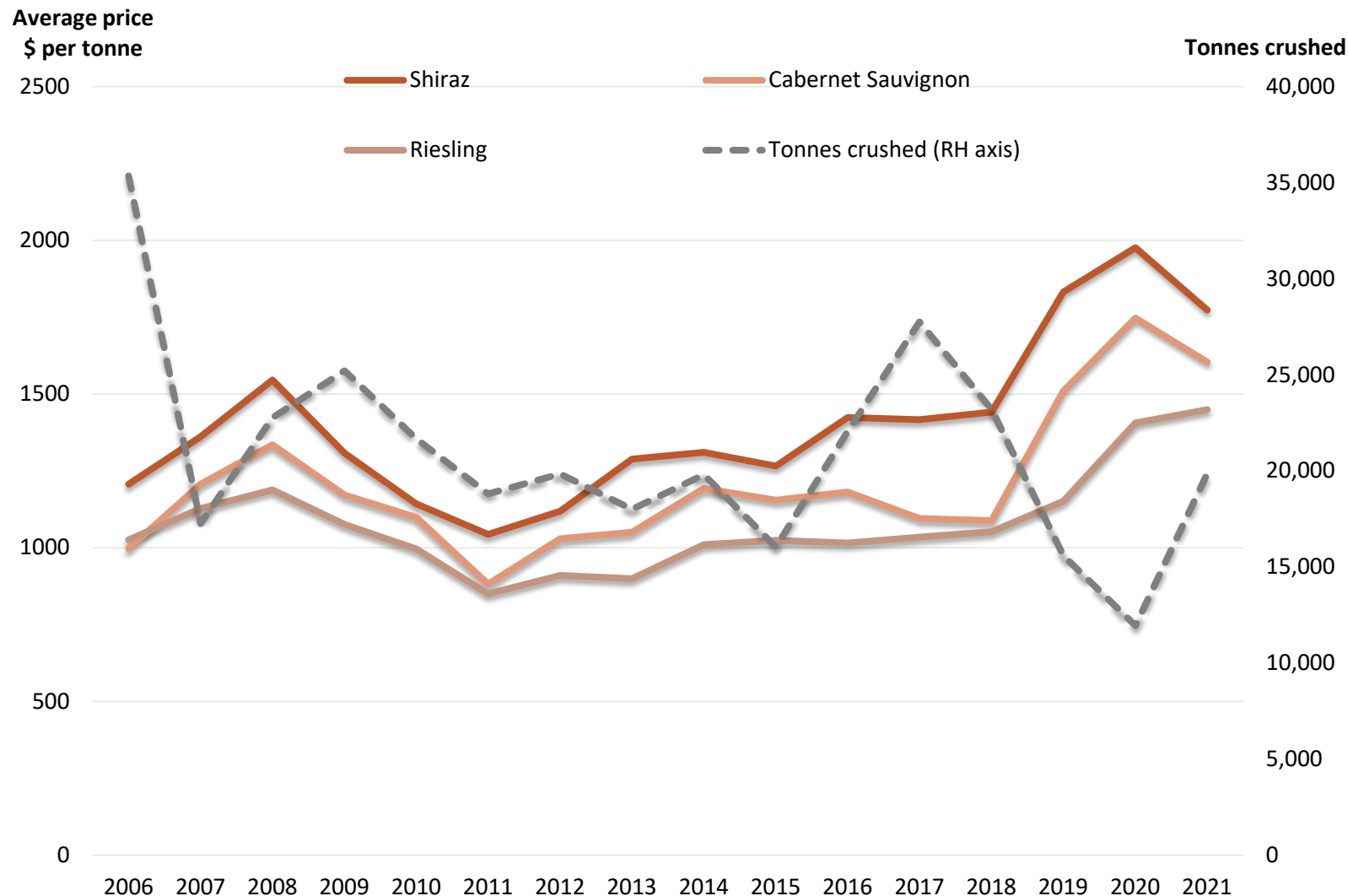
Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|-------------------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Barbera | | | | | 8 | 100% | 8 | \$13,919 |
| Cabernet Franc | 4 | \$5,746 | \$1,466 | 0% | 24 | 86% | 28 | \$41,323 |
| Cabernet Sauvignon | 973 | \$1,560,292 | \$1,604 | -8% | 2,827 | 74% | 3,800 | \$6,094,702 |
| Graciano | | | | | 9 | 100% | 9 | \$18,127 |
| Grenache | 39 | \$81,074 | \$2,100 | 46% | 181 | 82% | 219 | \$460,560 |
| Malbec | 104 | \$171,823 | \$1,653 | 6% | 222 | 68% | 326 | \$539,537 |
| Mataro/Mourvedre | 105 | \$199,358 | \$1,893 | 1% | 92 | 47% | 198 | \$374,275 |
| Merlot | 560 | \$576,058 | \$1,028 | -4% | 611 | 52% | 1,171 | \$1,204,521 |
| Montepulciano | 4 | | | | 10 | 72% | 14 | \$27,120 |
| Muscat à petits grains rouges | | | | | 6 | 100% | 6 | \$8,140 |
| Nebbiolo | | | | | 6 | 100% | 6 | \$12,731 |
| Nero d'Avola | | | | | 6 | 100% | 6 | \$11,870 |
| Petit Verdot | | | | | 71 | 100% | 71 | \$68,153 |
| Pinot Noir | | | | | 39 | 100% | 39 | \$76,678 |
| Ruby Cabernet | | | | | 8 | 100% | 8 | \$8,090 |
| Sangiovese | 67 | \$81,177 | \$1,219 | 12% | 160 | 71% | 226 | \$275,912 |
| Shiraz | 2,290 | \$4,059,511 | \$1,773 | -10% | 5,302 | 70% | 7,592 | \$13,460,097 |
| Tempranillo | 68 | \$86,009 | \$1,260 | -8% | 108 | 61% | 176 | \$222,052 |
| Touriga Nacional | | | | | 20 | 100% | 20 | \$37,864 |
| Other red | 2 | | | | 17 | 91% | 18 | \$27,285 |
| Red Total | 4,215 | \$6,831,622 | \$1,621 | -10% | 9,726 | 70% | 13,942 | \$22,982,956 |
| White | | | | | | | | |
| Chardonnay | 287 | \$299,329 | \$1,045 | 1% | 170 | 37% | 457 | \$477,141 |
| Fiano | 21 | | | | 34 | 61% | 55 | \$99,467 |
| Gewürztraminer | 76 | \$79,850 | \$1,056 | 0% | 53 | 41% | 129 | \$136,073 |
| Pinot Gris/Grigio | 129 | \$167,886 | \$1,297 | 2% | 346 | 73% | 476 | \$617,154 |
| Riesling | 2,375 | \$3,440,921 | \$1,449 | 3% | 1,947 | 45% | 4,321 | \$6,261,718 |
| Sauvignon Blanc | | | | | 28 | 100% | 28 | \$33,378 |
| Semillon | 228 | \$157,567 | \$691 | -4% | 37 | 14% | 265 | \$183,399 |
| Verdelho | | | | | 6 | 100% | 6 | \$6,145 |
| Vermentino | 5 | | | | 7 | 61% | 12 | \$16,184 |
| Viognier | | | | | 54 | 100% | 54 | \$75,812 |
| Other white | | | | | 112 | 100% | 112 | \$132,033 |
| White Total | 3,120 | \$4,190,258 | \$1,343 | -1% | 2,795 | 47% | 5,915 | \$8,038,503 |
| Grand Total | 7,335 | \$11,021,880 | \$1,503 | -4% | 12,522 | 63% | 19,857 | \$31,021,459 |

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

Clare Valley

Historical weighted average price vs tonnes crushed



Clare Valley

Price dispersion – purchased grapes

| | Tonnes purchased in each price segment | | | | | Total tonnes purchased |
|--------------------|--|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | | |
| Cabernet Franc | | | 3 | 1 | | 4 |
| Cabernet Sauvignon | | | 237 | 630 | 106 | 973 |
| Grenache | | | | 20 | 19 | 39 |
| Malbec | | | 30 | 41 | 32 | 104 |
| Mataro/Mourvedre | | | | 72 | 33 | 105 |
| Merlot | | | 560 | | | 560 |
| Montepulciano | | | | | 4 | 4 |
| Sangiovese | | | 67 | | | 67 |
| Shiraz | | | 253 | 1,621 | 416 | 2,290 |
| Tempranillo | | | 53 | 16 | | 68 |
| Other red | | | | 2 | | 2 |
| Red Total | | | 1,203 | 2,403 | 609 | 4,215 |
| White | | | | | | |
| Chardonnay | 2 | | 284 | | | 287 |
| Fiano | | | | 21 | | 21 |
| Gewürztraminer | | | 67 | 9 | | 76 |
| Pinot Gris/Grigio | | | 129 | | | 129 |
| Riesling | | 17 | 1,330 | 917 | 109 | 2,374 |
| Semillon | 120 | 56 | 48 | 4 | | 228 |
| Vermentino | | | 5 | | | 5 |
| White Total | 122 | 74 | 1,863 | 951 | 109 | 3,119 |
| Total purchased | 122 | 74 | 3,066 | 3,354 | 719 | 7,335 |

Clare Valley

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|--------------|-----------|-----------|-----------|--------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Franc | 16 | 0 | 2 | 0 | 18 | 0% |
| Cabernet Sauvignon | 1,066 | 12 | 19 | 0 | 1,097 | 0% |
| Grenache | 67 | 0 | 0 | 9 | 76 | 12% |
| Malbec | 83 | 1 | 0 | 0 | 84 | 0% |
| Mataro (Mourvedre) | 34 | 0 | 0 | 0 | 34 | 0% |
| Merlot | 238 | 0 | 0 | 0 | 238 | 0% |
| Nebbiolo | 3 | 0 | 0 | 0 | 3 | 0% |
| Nero d'Avola | 5 | 0 | 0 | 0 | 5 | 0% |
| Petit Verdot | 14 | 0 | 0 | 0 | 14 | 0% |
| Pinot Noir | 8 | 0 | 0 | 0 | 8 | 0% |
| Sangiovese | 25 | 10 | 0 | 0 | 35 | 0% |
| Shiraz | 1,839 | 29 | 33 | 43 | 1,944 | 2% |
| Tempranillo | 38 | 0 | 0 | 0 | 38 | 0% |
| Touriga | 3 | 0 | 0 | 0 | 3 | 0% |
| Zinfandel | 3 | 0 | 0 | 0 | 3 | 0% |
| Other Red | 13 | 2 | 1 | 1 | 17 | 6% |
| Total red varieties | 3,455 | 54 | 55 | 53 | 3,617 | 1% |
| White winegrapes | | | | | | |
| Riesling | 1,044 | 0 | 7 | 9 | 1,060 | 1% |
| Chardonnay | 137 | 0 | 0 | 0 | 137 | 0% |
| Fiano | 9 | 0 | 0 | 0 | 9 | 0% |
| Muscat Gordo Blanco | 1 | 0 | 0 | 1 | 2 | 50% |
| Pinot Gris | 57 | 1 | 6 | 0 | 64 | 0% |
| Sauvignon Blanc | 14 | 0 | 0 | 0 | 14 | 0% |
| Semillon | 74 | 0 | 0 | 0 | 74 | 0% |
| Traminer (Gewurztraminer) | 21 | 0 | 0 | 0 | 21 | 0% |
| Vermentino | 5 | 0 | 0 | 0 | 5 | 0% |
| Viognier | 10 | 0 | 0 | 0 | 10 | 0% |
| Other White | 24 | 1 | 0 | 2 | 27 | 7% |
| Total white varieties | 1,396 | 2 | 13 | 12 | 1,423 | 1% |
| Unknown variety | 11 | 0 | 0 | 0 | 11 | 0% |
| Rootstock Block | 1 | 0 | 0 | 0 | 1 | 0% |
| Table grapes | 0 | 0 | 0 | 0 | 0 | 0% |
| Total all varieties | 4,863 | 56 | 68 | 65 | 5,052 | 1% |

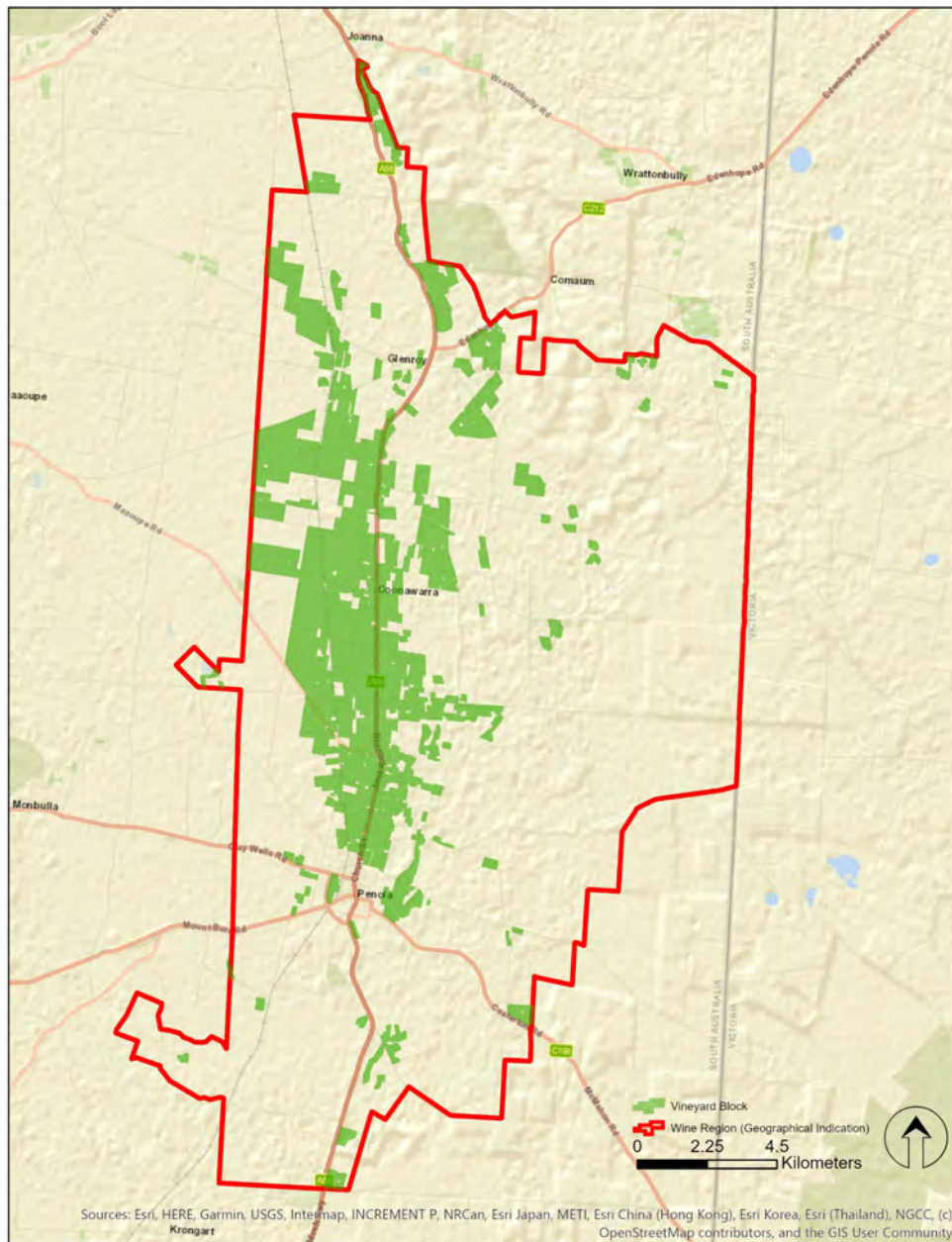
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Coonawarra Wine Region

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 29 November 2019
SOFTWARE: Esri ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

**Coonawarra
Wine Region**



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Coonawarra

Vintage overview

VINTAGE REPORT

The 2021 Vintage in Coonawarra has the hallmarks of an incredible vintage, with superb conditions and fruit of outstanding quality and quantity being harvested.

The season was mild with very stable weather conditions. The temperatures during the growing season were mild with only minor fluctuations and no major rainfall events.

Dry conditions continued right through summer, and consequently berries remained relatively small with thick skins. Coonawarra did receive several small rainfall events during the growing which was beneficial to the general vine health and soil moisture.

These climatic conditions led to long and steady increases in maturity levels, allowing winemakers to pick at optimum levels for ripeness and flavour.

Yields overall are above the long-term average with increased bunch and berry numbers. The increased yields resulted in some bunch thinning at veraison to maintain good flavour and balance.

The 2021 vintage was free of disease, drought, and smoke taint.

The peak harvest for the region began in early April, following the Easter break, and continued until mid-May when the last of the region's signature variety was harvested.

Based on the mild summer, and the colour and aromas that are coming through in the finished ferments, 2021 points to an exceptionally good vintage with lovely firm acidity in the whites and good fruit expression and tannins across all reds, which at this early stage, will translate into wines that have excellent cellaring potential.

Coonawarra Vignerons Board (Coonawarra Grape and Wine Incorporated), April 2021

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Coonawarra winegrapes was 50,199 tonnes in 2021, nearly double the very low 2020 crush of 26,240 tonnes. It was the largest recorded crush for the region since 2004. Over the past five years (up to 2020), the average crush for Coonawarra has been 33,100 tonnes, making this year's crush 52 per cent above the five-year average.

There were 40 respondents to the survey who reported crushing grapes from Coonawarra in 2021, compared with 36 in 2020.

The total estimated value of Coonawarra winegrapes in 2021 was just over \$65.5 million compared with \$44 million in 2020. The higher production was partly offset by a 23 per cent decrease in the average purchase value of grapes, which declined from \$1723 overall in 2020 to \$1318 per tonne.

There were decreases in average prices for all the major varieties except Pinot Noir, which increased 21 per cent to \$1550 per tonne. Cabernet Sauvignon decreased by 24 per cent to \$1424 per tonne.

The price dispersion data shows a downward shift in prices paid, with 38 per cent of grapes purchased at \$1500 and above, compared with 76 per cent in 2020, while 14 per cent was purchased at below \$600 per tonne, compared with none in 2020.

According to Vinehealth Australia data, the total vineyard area in Coonawarra as at 30 April 2021 is 5841 hectares, virtually identical to the previous year, and around 20 hectares more than it was 5 years ago.

New plantings in the region declined dramatically from 222 hectares in the 2019–20 season to just 12 hectares in 2020–21, almost all of them Cabernet Sauvignon.

Coonawarra

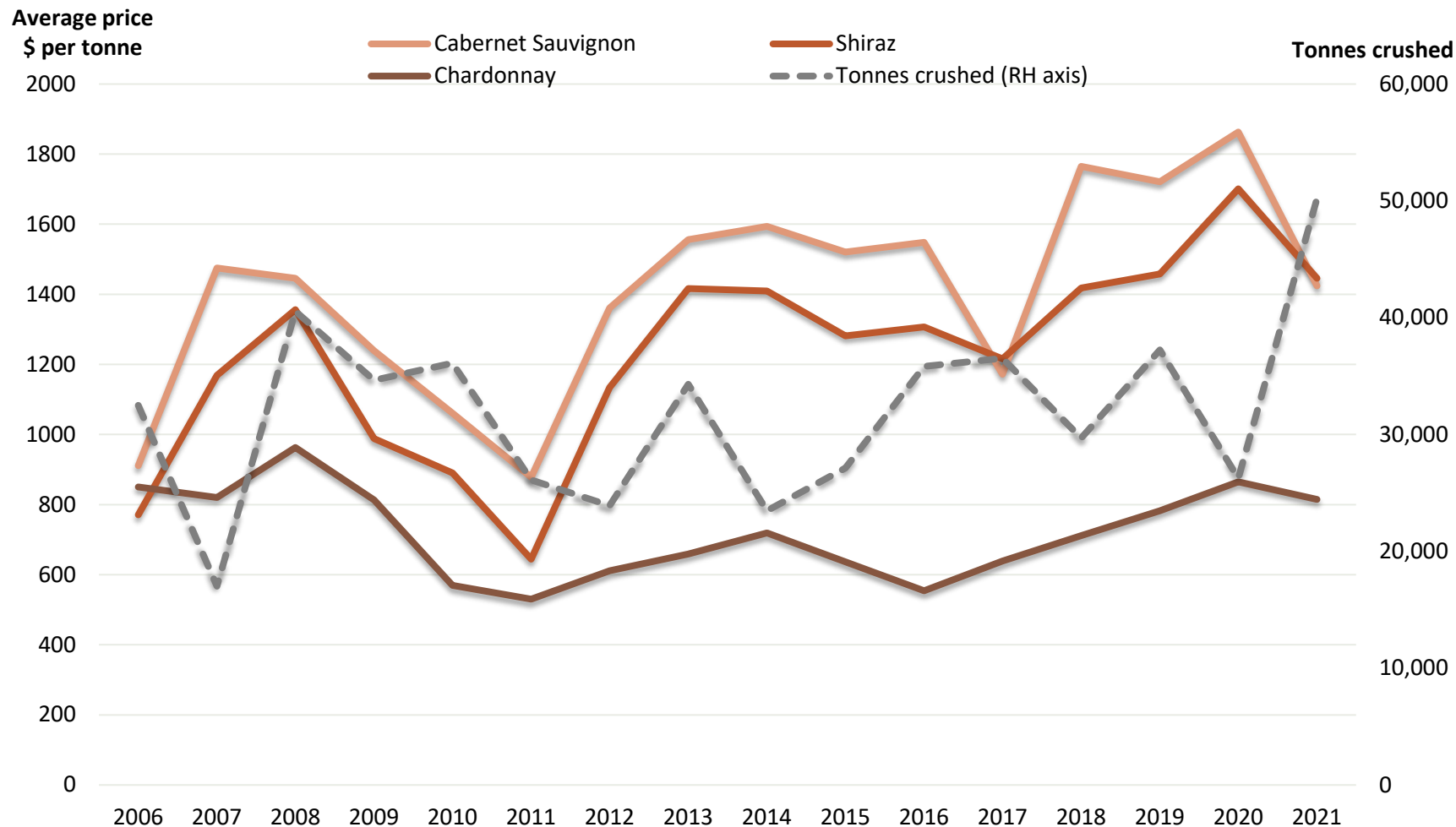
Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Cabernet Franc | 16 | | | | 104 | 86% | 120 | \$163,024 |
| Cabernet Sauvignon | 8,398 | \$11,956,141 | \$1,424 | -24% | 19,684 | 70% | 28,081 | \$39,979,540 |
| Malbec | 29 | | | | 162 | 85% | 191 | \$426,377 |
| Merlot | 1,126 | \$710,168 | \$631 | -51% | 3,215 | 74% | 4,341 | \$2,738,528 |
| Nebbiolo | 16 | | | | | | 16 | \$37,080 |
| Petit Verdot | 34 | | | | 393 | 92% | 427 | \$255,983 |
| Pinot Meunier | | | | | 8 | 100% | 8 | \$14,278 |
| Pinot Noir | 113 | \$175,769 | \$1,550 | 21% | 323 | 74% | 437 | \$676,957 |
| Shiraz | 2,187 | \$3,163,818 | \$1,446 | -15% | 9,597 | 81% | 11,785 | \$17,045,070 |
| Tempranillo | | | | | 8 | 100% | 8 | \$13,219 |
| Other red | 12 | | | | 0 | 2% | 12 | \$9,408 |
| Red Total | 11,931 | \$16,159,156 | \$1,354 | -24% | 33,495 | 74% | 45,426 | \$61,359,464 |
| White | | | | | | | | |
| Chardonnay | 609 | \$496,956 | \$815 | -6% | 2,216 | 78% | 2,825 | \$2,303,781 |
| Pinot Gris/Grigio | 36 | | | | | | 36 | \$35,950 |
| Riesling | 24 | | | | 482 | 95% | 506 | \$594,082 |
| Sauvignon Blanc | 259 | \$252,868 | \$977 | -7% | 892 | 77% | 1,150 | \$1,123,681 |
| Semillon | 31 | | | | 220 | 88% | 251 | \$150,686 |
| Other white | | | | | 4 | 100% | 4 | \$9,841 |
| White Total | 959 | \$832,480 | \$868 | -6% | 3,814 | 80% | 4,773 | \$4,218,022 |
| Grand Total | 12,891 | \$16,991,636 | \$1,318 | -23% | 37,308 | 74% | 50,199 | \$65,577,486 |

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

Coonawarra

Historical weighted average price vs tonnes crushed



Coonawarra

Price dispersion – purchased grapes

| Tonnes purchased in each price segment | | | | | | Total tonnes purchased |
|--|--------|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | | |
| Cabernet Franc | | | 9 | 7 | | 16 |
| Cabernet Sauvignon | 1,020 | 340 | 3,477 | 2,049 | 1,512 | 8,398 |
| Malbec | | | | | 29 | 29 |
| Merlot | 721 | 93 | 294 | 18 | | 1,126 |
| Nebbiolo | | | | | 16 | 16 |
| Petit Verdot | | 34 | | | | 34 |
| Pinot Noir | | 4 | 33 | 57 | 19 | 113 |
| Shiraz | 65 | 28 | 984 | 797 | 313 | 2,187 |
| Other red | | 12 | | | | 12 |
| Red Total | 1,807 | 510 | 4,798 | 2,928 | 1,890 | 11,931 |
| White | | | | | | |
| Chardonnay | | 419 | 191 | | | 609 |
| Pinot Gris/Grigio | | | 36 | | | 36 |
| Riesling | | | 24 | | | 24 |
| Sauvignon Blanc | | 24 | 235 | | | 259 |
| Semillon | | 31 | | | | 31 |
| White Total | | 474 | 485 | | | 959 |
| Total purchased | 1,807 | 983 | 5,283 | 2,928 | 1,890 | 12,891 |

Coonawarra

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|--------------|-----------|------------|-----------|--------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Franc | 21 | 0 | 4 | 0 | 25 | 0% |
| Cabernet Sauvignon | 3,522 | 18 | 212 | 11 | 3,763 | 0% |
| Malbec | 18 | 0 | 2 | 0 | 20 | 0% |
| Merlot | 354 | 0 | 4 | 1 | 359 | 0% |
| Meunier (Pinot Meunier) | 2 | 0 | 0 | 0 | 2 | 0% |
| Petit Verdot | 17 | 0 | 0 | 0 | 17 | 0% |
| Pinot Noir | 36 | 0 | 0 | 0 | 36 | 0% |
| Shiraz | 1,164 | 5 | 0 | 0 | 1,169 | 0% |
| Tempranillo | 3 | 0 | 0 | 0 | 3 | 0% |
| Other Red | 5 | 2 | 0 | 0 | 7 | 0% |
| Total red varieties | 5,142 | 25 | 222 | 12 | 5,401 | 0% |
| White winegrapes | | | | | | |
| Chardonnay | 255 | 3 | 0 | 0 | 258 | 0% |
| Riesling | 45 | 0 | 0 | 0 | 45 | 0% |
| Sauvignon Blanc | 91 | 0 | 0 | 0 | 91 | 0% |
| Semillon | 12 | 0 | 0 | 0 | 12 | 0% |
| Other White | 10 | 0 | 0 | 0 | 10 | 0% |
| Total white varieties | 413 | 3 | 0 | 0 | 416 | 0% |
| Unknown variety | 24 | 0 | 0 | 0 | 24 | 0% |
| Total all varieties | 5,579 | 28 | 222 | 12 | 5,841 | 0% |

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Currency Creek Wine Region

Wine Australia July 2021



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

Currency Creek
Wine Region



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Currency Creek

Vintage overview

VINTAGE REPORT

Ideal Mediterranean winter rainfall and then cooler than average summer conditions resulted in a well-balanced vintage for the Currency Creek Wine Region in 2021. Yields were 5-20% above expected estimates, particularly in some reds, a welcome relief to growers after the previous two low-yielding vintages.

Strong winds and rain showers during flowering saw a degree of variation in fruit set in some varieties such as Cabernet Sauvignon and Chardonnay; however, the region experienced above average fruit set in other varieties including Shiraz and Pinot Gris.

White varieties benefited from some early cooler climatic conditions and the maritime influence of Currency Creek, resulting in excellent quality, good fruit ripeness and naturally balanced acidity. Sparkling varieties were particularly impressive.

Continued cooler than average mean temperatures through January and February eventually delayed harvest across most red varieties by 7 -14 days when compared to the historical average start dates.

The March and April temperatures continued to be below average with unusually low night-time temperatures. No significant summer ripening rainfall or disease pressure was experienced.

The reds were picked from late March through to mid-April and benefitted greatly from the mild dry finish to the ripening season. The prolonged ripening time ensured great varietal character, depth and colour. Currency Creek consistently produces high quality Cabernet Sauvignon and this year was no exception. Merlot also performed particularly well. These young wines are showing lifted and fruit-forward characteristics.

*Nathan Shaw, President
Currency Creek Wine Region*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Currency Creek winegrapes was 5532 tonnes in 2021, up by 73 per cent compared with the 2020 reported crush of 3189 tonnes. It was 10 per cent below the 5-year average (2016–2020) of 6177 tonnes.

There were 11 respondents to the survey who reported crushing grapes from Currency Creek in 2021, compared with 17 in 2020.

The total estimated value of Currency Creek winegrapes in 2021 was just over \$6 million, compared with just under \$4 million in 2020 – a 63 per cent increase. The increase in production was offset to some extent by an decrease in the average purchase value of grapes, which decreased by 10 per cent from \$1279 per tonne in 2020 to \$1152 per tonne.

The average value of Shiraz decreased by 13 per cent to \$1187 per tonne, while the average value of Cabernet Sauvignon decreased by 12 per cent to \$1133 per tonne.

The price dispersion data shows that almost all grapes were purchased at between \$900 and \$1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in Currency Creek as at 30 April 2021 is 1004 hectares, with no new plantings for the past two years. The total area is around 40 hectares more than it was 5 years ago.

Currency Creek

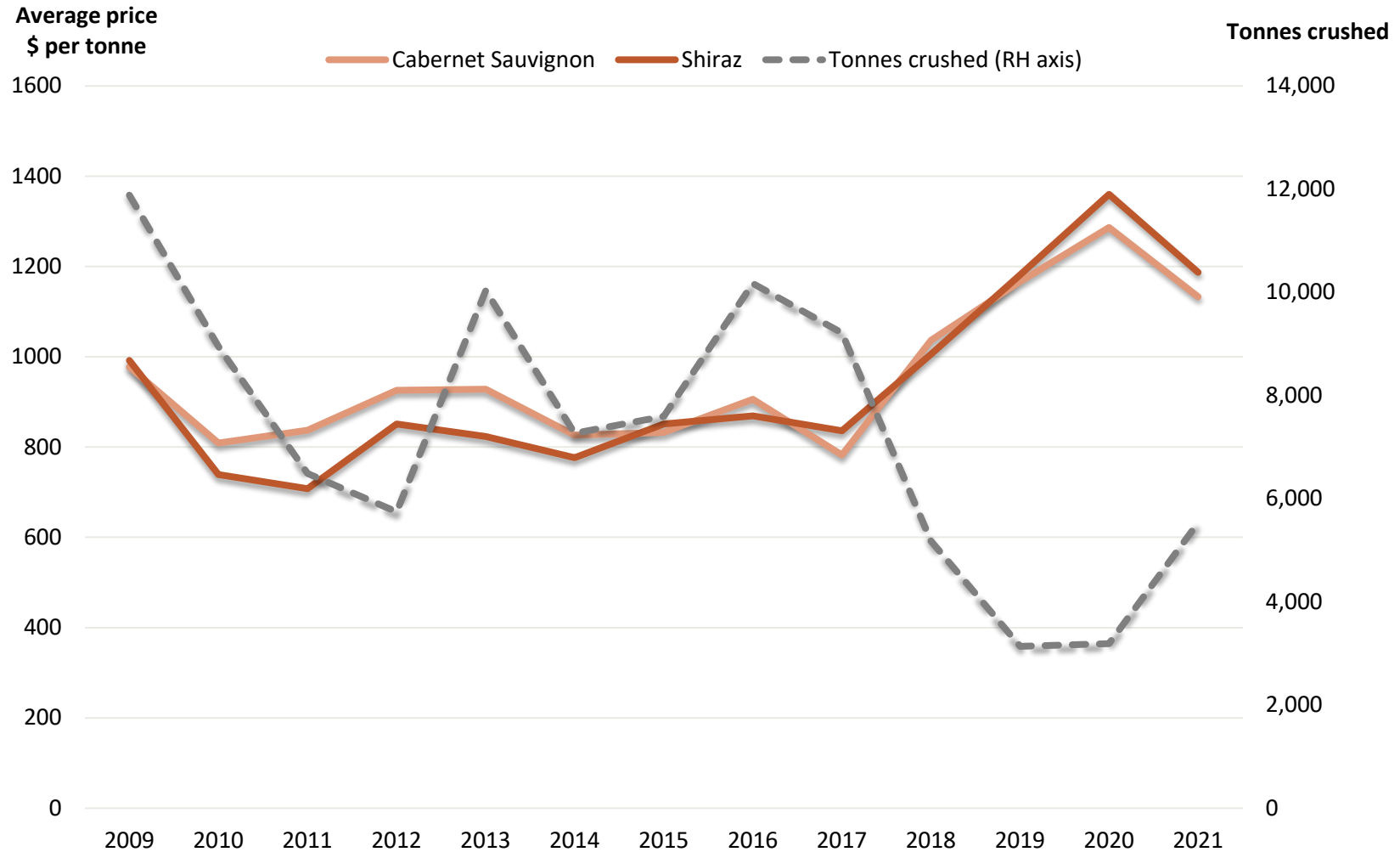
Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 301 | \$340,941 | \$1,133 | -12% | 1,198 | 80% | 1,499 | \$1,698,080 |
| Durif | | | | | 258 | 100% | 258 | \$348,947 |
| Grenache | | | | | 146 | 100% | 146 | \$317,518 |
| Lagrein | 9 | | | | | | 9 | \$12,768 |
| Merlot | 52 | | | | 235 | 82% | 287 | \$203,026 |
| Montepulciano | 12 | | | | | | 12 | \$21,456 |
| Nero d'Avola | 5 | | | | | | 5 | \$10,160 |
| Petit Verdot | | | | | 69 | 100% | 69 | \$66,566 |
| Pinot Noir | 40 | | | | | | 40 | \$47,820 |
| Sangiovese | 43 | | | | | | 43 | \$64,740 |
| Shiraz | 1,017 | \$1,207,519 | \$1,187 | -13% | 1,373 | 57% | 2,390 | \$2,837,661 |
| Tempranillo | 33 | | | | | | 33 | \$44,925 |
| Red Total | 1,512 | \$1,787,158 | \$1,182 | -11% | 3,279 | 68% | 4,791 | \$5,673,668 |
| White | | | | | | | | |
| Chardonnay | 36 | | | | 206 | 85% | 242 | \$145,284 |
| Gewürztraminer | | | | | 99 | 100% | 99 | \$96,430 |
| Pinot Gris/Grigio | 66 | | | | | | 66 | \$67,854 |
| Prosecco | 19 | | | | | | 19 | \$27,898 |
| Sauvignon Blanc | 104 | \$83,634 | \$806 | 23% | 160 | 61% | 264 | \$212,599 |
| Vermentino | 50 | | | | | | 50 | \$70,378 |
| White Total | 276 | \$271,652 | \$985 | 8% | 465 | 63% | 741 | \$620,443 |
| Grand Total | 1,787 | \$2,058,810 | \$1,152 | -10% | 3,744 | 68% | 5,532 | \$6,294,111 |

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

Currency Creek

Historical weighted average price vs tonnes crushed



Currency Creek

Price dispersion – purchased grapes

| Tonnes purchased in each price segment | | | | | Total tonnes purchased |
|--|--------------|---------------|----------------|---------|------------------------|
| Varieties | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | |
| Cabernet Sauvignon | 52 | 207 | 42 | | 301 |
| Lagrein | | 9 | | | 9 |
| Merlot | 52 | | | | 52 |
| Montepulciano | | | 12 | | 12 |
| Nero d'Avola | | | | 5 | 5 |
| Pinot Noir | | 40 | | | 40 |
| Sangiovese | | | 43 | | 43 |
| Shiraz | 159 | 765 | 93 | | 1,017 |
| Tempranillo | 5 | | 28 | | 33 |
| Red Total | 268 | 1,021 | 218 | 5 | 1,512 |
| White | | | | | |
| Chardonnay | 36 | | | | 36 |
| Pinot Gris/Grigio | | 66 | | | 66 |
| Prosecco | | 19 | | | 19 |
| Sauvignon Blanc | 72 | 32 | | | 104 |
| Vermentino | | 50 | | | 50 |
| White Total | 109 | 167 | | | 276 |
| Total purchased | 376 | 1,188 | 218 | 5 | 1,787 |

Currency Creek

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|-----------|----------|----------|--------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 298 | 0 | 0 | 0 | 298 | 0% |
| Grenache | 11 | 0 | 0 | 0 | 11 | 0% |
| Merlot | 60 | 0 | 0 | 0 | 60 | 0% |
| Pinot Noir | 12 | 0 | 0 | 0 | 12 | 0% |
| Shiraz | 344 | 10 | 0 | 0 | 354 | 0% |
| Other Red | 29 | 0 | 0 | 0 | 29 | 0% |
| Total red varieties | 754 | 10 | 0 | 0 | 764 | 0% |
| White winegrapes | | | | | | |
| Chardonnay | 122 | 0 | 0 | 0 | 122 | 0% |
| Pinot Gris | 31 | 0 | 0 | 0 | 31 | 0% |
| Riesling | 10 | 0 | 0 | 0 | 10 | 0% |
| Sauvignon Blanc | 55 | 0 | 0 | 0 | 55 | 0% |
| Semillon | 7 | 0 | 0 | 0 | 7 | 0% |
| Viognier | 2 | 0 | 0 | 0 | 2 | 0% |
| Other White | 11 | 0 | 0 | 0 | 11 | 0% |
| Total white varieties | 238 | 0 | 0 | 0 | 238 | 0% |
| Unknown variety | 2 | 0 | 0 | 0 | 2 | 0% |
| Total all varieties | 994 | 10 | 0 | 0 | 1,004 | 0% |

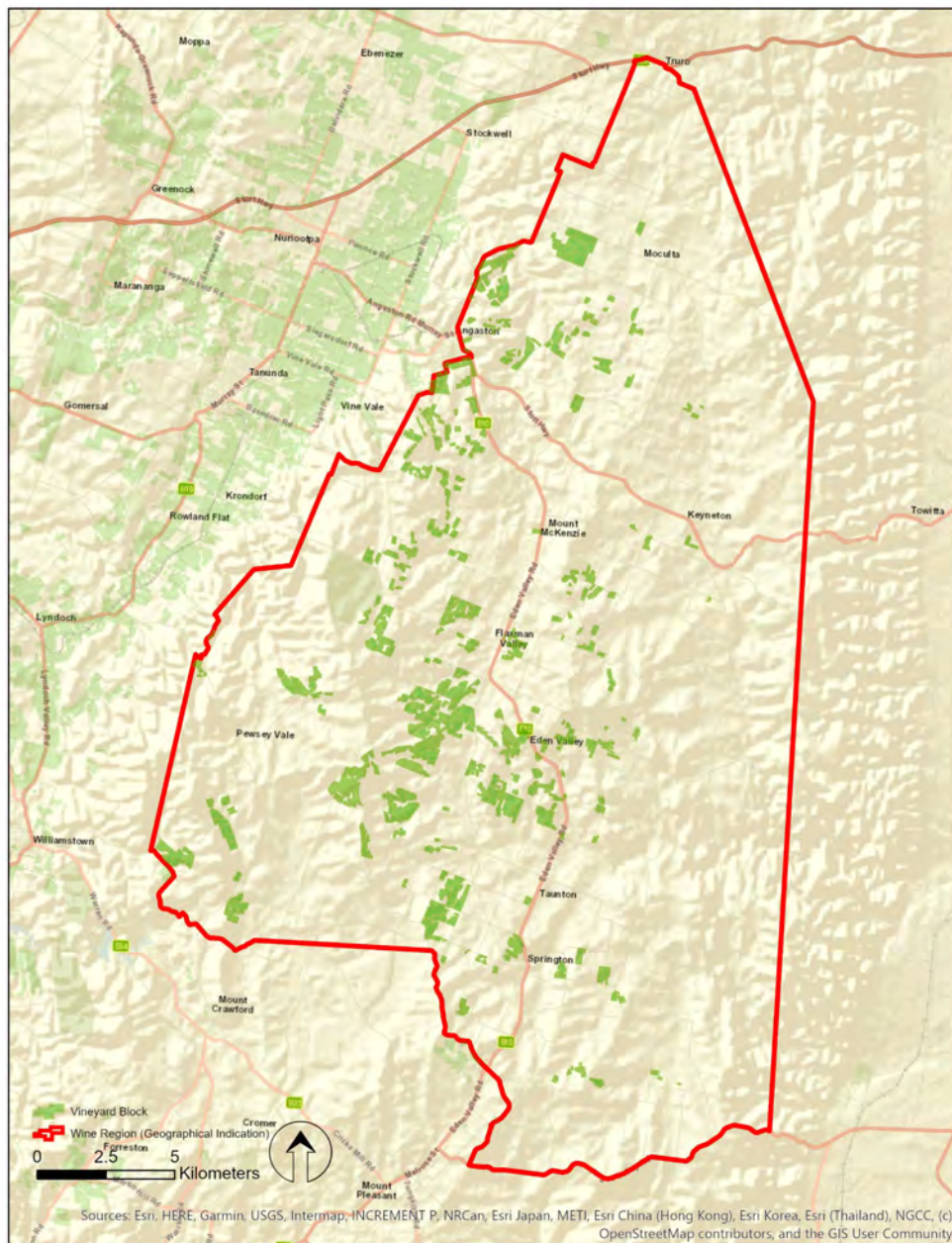
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Eden Valley Wine Region

Wine Australia July 2021



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

**Eden Valley
Wine Region**



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Eden Valley

Vintage overview

VINTAGE REPORT

Winter rainfall in Eden Valley (at the Mount Crawford weather station) totalled 274.8mm, 5% below average. However, rainfall across the region was quite sporadic, with other vineyards only recording 230-250mm. August was the wettest month for the winter period, with a rainfall total 11% above average. Despite this rainfall replenishing soil profiles, many dams, which much of the region rely on, did not fill, so the rainfall continuing into September and October was welcome. The La Niña weather pattern did not bring rain to South Australia and from November dry conditions ensued. Growing season rainfall (Oct-Mar) was 20% below average with only February recording above average rainfall..

Temperatures were relatively mild for much of the growing season, providing ideal conditions for growth and berry development. The strong winds that are often associated with flowering at this time were largely absent, allowing good fruit set. Following November, maximum temperatures were below average for the remainder of the season. During spring and summer, night-time temperatures were below average, and diurnal differences were above average. These cool nights are critical to and the hallmark for the quality of grapes and wines from the Eden Valley, allowing the vines to rest, and aromatic flavours, finesse and natural acidity to be maintained. The mild daytime conditions provided optimal ripening conditions, allowing fruit flavours to develop.

Whilst yields across the region were varied depending on the water supply, they were mostly higher than vintage 2020.

Quality is exceptional from the 2021 EV vintage. Whites are fine with amazing natural acid and intense flavours. Reds are flavourful and deeply coloured. A vintage for now and the long term.

Brooke Howell and Louisa Rose (Yalumba) on behalf of Barossa Grape & Wine Association.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Eden Valley winegrapes was 9669 tonnes in 2021, an increase of 167 per cent compared with the very low reported crush of 6324 tonnes in 2020. Over the past five years (up to 2020), the average crush for Eden Valley has been 8647 tonnes, making this year's crush 12 per cent above the five-year average.

There were 39 respondents to the survey who reported crushing grapes from Eden Valley in 2021, compared with 41 in 2020.

The total estimated value of winegrapes in 2021 increased from \$7.6 million in 2020 to just under \$21 million as a result of the higher production combined with a small overall increase in the average purchase value of grapes, which increased by 2 per cent from \$2147 to \$2192 per tonne.

There were decreases in average value for the major reds; Shiraz was down 7 per cent to \$2760 per tonne and Cabernet Sauvignon was down 19 per cent to \$2405 per tonne. However, whites were up overall, with Chardonnay up by 4 per cent to \$1697 and Riesling up 5 per cent to \$1864 per tonne.

Despite the decrease in average value for reds, the price dispersion showed an upward shift, with 54 per cent of all varieties purchased at \$2000 and above, compared with 45 per cent in 2020.

According to Vinehealth Australia data, there were only 9 hectares of new vines planted in the 2020–2021 season, compared with 89 hectares in the 2019-20 season. The varieties planted were Shiraz, Tempranillo and Pinot Gris/Grigio.

The total vineyard area in Eden Valley as at 30 April 2021 was 2389 hectares, approximately 100 hectares (5 per cent) larger than it was five years ago.

Eden Valley

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|-------------------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Barbera | | | | | 2 | 100% | 2 | \$2,724 |
| Cabernet Franc | 11 | | | | 27 | 72% | 37 | \$92,540 |
| Cabernet Sauvignon | 306 | \$737,059 | \$2,405 | -19% | 935 | 75% | 1,241 | \$2,985,944 |
| Durif | | | | | 7 | 100% | 7 | \$9,322 |
| Graciano | 4 | | | | 7 | 63% | 12 | \$25,960 |
| Grenache | 11 | \$31,599 | \$2,879 | 5% | 4 | 28% | 15 | \$43,980 |
| Lagrein | | | | | 8 | 100% | 8 | \$9,740 |
| Mataro/Mourvedre | 12 | | | | 70 | 85% | 82 | \$213,614 |
| Merlot | 78 | \$97,647 | \$1,248 | -24% | 184 | 70% | 262 | \$327,471 |
| Montepulciano | 6 | | | | 7 | 54% | 13 | \$25,296 |
| Nebbiolo | | | | | 5 | 100% | 5 | \$12,258 |
| Nero d'Avola | 4 | | | | | | 4 | \$10,400 |
| Petit Verdot | | | | | 46 | 100% | 46 | \$44,938 |
| Pinot Noir | 131 | \$176,007 | \$1,348 | 3% | 49 | 27% | 179 | \$241,465 |
| Shiraz | 1,913 | \$5,281,441 | \$2,760 | -7% | 1,455 | 43% | 3,369 | \$9,298,630 |
| Tempranillo | 36 | | | | 15 | 29% | 50 | \$95,840 |
| Other red | 8 | | | | 16 | 68% | 24 | \$45,087 |
| Red Total | 2,520 | \$6,496,776 | \$2,578 | -6% | 2,837 | 53% | 5,357 | \$13,485,210 |
| White | | | | | | | | |
| Chardonnay | 391 | \$663,298 | \$1,697 | 4% | 601 | 61% | 992 | \$1,683,783 |
| Gewürztraminer | 25 | | | | 7 | 22% | 32 | \$36,806 |
| Grüner Veltliner | | | | | 7 | 100% | 7 | \$13,669 |
| Muscat à petits grains blancs | 25 | \$22,275 | \$899 | -13% | 1 | 3% | 26 | \$22,976 |
| Pinot Gris/Grigio | 178 | \$268,239 | \$1,507 | -1% | 249 | 58% | 427 | \$643,574 |
| Riesling | 810 | \$1,510,258 | \$1,864 | 5% | 1,322 | 62% | 2,132 | \$3,974,652 |
| Roussanne | 59 | | | | 16 | 21% | 75 | \$115,874 |
| Sauvignon Blanc | 81 | \$78,603 | \$975 | -7% | 91 | 53% | 172 | \$167,473 |
| Semillon | 94 | \$68,537 | \$729 | 1% | 21 | 18% | 115 | \$83,961 |
| Viognier | 128 | \$235,831 | \$1,848 | -23% | 81 | 39% | 209 | \$386,203 |
| Other white | 24 | | | | 101 | 81% | 125 | \$195,450 |
| White Total | 1,814 | \$3,002,697 | \$1,655 | 4% | 2,498 | 58% | 4,312 | \$7,324,422 |
| Grand Total | 4,334 | \$9,499,472 | \$2,192 | 2% | 5,336 | 55% | 9,669 | \$20,809,632 |

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

Eden Valley

Price dispersion – purchased grapes

| | Tonnes purchased by price segment | | | | | Total tonnes purchased |
|-------------------------------|-----------------------------------|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | | |
| Cabernet Franc | | | | | 11 | 11 |
| Cabernet Sauvignon | | | | 66 | 241 | 306 |
| Graciano | | | | | 4 | 4 |
| Grenache | | | 1 | | 10 | 11 |
| Mataro/Mourvedre | | | | | 12 | 12 |
| Merlot | | 18 | 43 | 11 | 7 | 78 |
| Montepulciano | | | | | 6 | 6 |
| Nero d'Avola | | | | | 4 | 4 |
| Pinot Noir | | | 88 | 43 | | 131 |
| Shiraz | | 11 | 12 | 201 | 1,689 | 1,913 |
| Tempranillo | | | | 31 | 4 | 36 |
| Other red | | | 5 | | 3 | 8 |
| Red Total | | 29 | 148 | 352 | 1,991 | 2,520 |
| White | | | | | | |
| Chardonnay | | | 7 | 313 | 70 | 391 |
| Gewürztraminer | | | 25 | | | 25 |
| Muscat à petits grains blancs | | 19 | 4 | 1 | | 25 |
| Pinot Gris/Grigio | | | 32 | 146 | | 178 |
| Riesling | | 1 | 10 | 548 | 251 | 810 |
| Roussanne | | | 15 | 45 | | 59 |
| Sauvignon Blanc | | | 81 | | | 81 |
| Semillon | 3 | 84 | 6 | | | 94 |
| Viognier | | | | 83 | 45 | 128 |
| Other white | | | | 24 | | 24 |
| White Total | 3 | 105 | 181 | 1,160 | 365 | 1,814 |
| Total purchased | 3 | 134 | 329 | 1,512 | 2,356 | 4,334 |

Eden Valley

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|--|--------------|-----------|-----------|----------|--------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Franc | 6 | 0 | 0 | 0 | 6 | 0% |
| Cabernet Sauvignon | 339 | 3 | 40 | 0 | 382 | 0% |
| Grenache | 20 | 0 | 1 | 0 | 21 | 0% |
| Mataro (Mourvedre) | 16 | 0 | 1 | 0 | 17 | 0% |
| Merlot | 57 | 0 | 0 | 0 | 57 | 0% |
| Montepulciano | 3 | 0 | 0 | 0 | 3 | 0% |
| Petit Verdot | 7 | 0 | 0 | 0 | 7 | 0% |
| Pinot Noir | 54 | 0 | 0 | 0 | 54 | 0% |
| Shiraz | 774 | 30 | 44 | 4 | 852 | 0% |
| Tempranillo | 12 | 0 | 0 | 2 | 14 | 14% |
| Other Red | 14 | 0 | 0 | 0 | 14 | 0% |
| Total red varieties | 1,302 | 33 | 86 | 6 | 1,427 | 0% |
| 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 | 3 | 43 | 7% |
| Riesling | 519 | 5 | 2 | 0 | 526 | 0% |
| Sauvignon Blanc | 37 | 0 | 0 | 0 | 37 | 0% |
| Semillon | 16 | 0 | 0 | 0 | 16 | 0% |
| Traminer (Gewurztraminer) | 17 | 0 | 0 | 0 | 17 | 0% |
| Viognier | 33 | 0 | 0 | 0 | 34 | 0% |
| Other White | 22 | 0 | 1 | 0 | 22 | 0% |
| Total white varieties | 934 | 5 | 3 | 3 | 945 | 0% |
| Unknown variety | 17 | 0 | 0 | 0 | 17 | 0% |
| Total all varieties | 2,253 | 38 | 89 | 9 | 2,389 | 0% |

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Fleurieu zone – other

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 21st December 2021
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

**Fleurieu
Wine Zone**



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Fleurieu zone – other

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | Change in price year on year | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Estimated total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|------------------------------|-----------------------------|-----------------------------|------------------------|----------------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 463 | \$475,198 | \$1,027 | -15% | 15 | 3% | 478 | \$490,906 |
| Malbec | 14 | | | | | | 14 | \$13,760 |
| Shiraz | 1,188 | \$1,263,992 | \$1,064 | -13% | 24 | 2% | 1,212 | \$1,289,526 |
| Tempranillo | 19 | | | | | | 19 | \$41,866 |
| Touriga Nacional | | | | | 1 | 100% | 1 | \$2,808 |
| Red Total | 1,684 | \$1,794,816 | \$1,066 | -13% | 41 | 2% | 1,725 | \$1,838,865 |
| White | | | | | | | | |
| Chardonnay | 550 | \$399,076 | \$725 | 6% | | | 550 | \$399,076 |
| Pinot Gris/Grigio | 483 | \$482,187 | \$997 | 5% | | | 483 | \$482,187 |
| Prosecco | 105 | | | | | | 105 | \$78,893 |
| Sauvignon Blanc | 485 | \$426,051 | \$879 | 0% | | | 485 | \$426,051 |
| Semillon | 49 | | | | | | 49 | \$29,136 |
| Viognier | 2 | | | | | | 2 | \$3,051 |
| White Total | 1,674 | \$1,418,394 | \$847 | 6% | | | 1,674 | \$1,418,394 |
| Grand Total | 3,358 | \$3,213,210 | \$957 | -5% | 41 | 1% | 3,399 | \$3,257,259 |

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

Fleurieu zone – other

Price dispersion – purchased grapes

| | Tonnes purchased in each price segment | | | | |
|--------------------|--|--------------|---------------|---------|-----------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | >\$2000 | Total purchased |
| Red | | | | | |
| Cabernet Sauvignon | | | 463 | | 463 |
| Malbec | | | 14 | | 14 |
| Shiraz | | 36 | 1,122 | 29 | 1,188 |
| Tempranillo | | | | 19 | 19 |
| Red Total | | 36 | 1,599 | 48 | 1,684 |
| White | | | | | |
| Chardonnay | 44 | 507 | | | 550 |
| Pinot Gris/Grigio | | | 483 | | 483 |
| Prosecco | | 105 | | | 105 |
| Sauvignon Blanc | | 129 | 355 | | 485 |
| Semillon | | 49 | | | 49 |
| Viognier | | | 2 | | 2 |
| White Total | 44 | 790 | 841 | | 1,674 |
| Total purchased | 44 | 826 | 2,440 | 48 | 3,358 |

Fleurieu zone – other

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|----------|----------|----------|------------|-------------------------|
| Red varieties | | | | | | |
| Cabernet Sauvignon | 36 | 0 | 0 | 0 | 36 | 0% |
| Grenache | 1 | 0 | 0 | 0 | 1 | 0% |
| Shiraz | 92 | 0 | 0 | 0 | 92 | 0% |
| Other Red | 4 | 0 | 0 | 0 | 4 | 0% |
| Total red varieties | 133 | 0 | 0 | 0 | 133 | 0% |
| White varieties | | | | | | |
| Chardonnay | 29 | 0 | 0 | 0 | 29 | 0% |
| Pinot Gris | 16 | 0 | 0 | 0 | 16 | 0% |
| Riesling | 2 | 0 | 0 | 0 | 2 | 0% |
| Sauvignon Blanc | 13 | 0 | 0 | 0 | 13 | 0% |
| Other White | 4 | 4 | 0 | 0 | 8 | 0% |
| Total white varieties | 64 | 4 | 0 | 0 | 68 | 0% |
| Unknown variety | 35 | 0 | 0 | 0 | 35 | 0% |
| Total all varieties | 232 | 4 | 0 | 0 | 236 | 0% |

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Kangaroo Island Wine Region

Wine Australia July 2021



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

Kangaroo Island
Wine Region



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Kangaroo Island

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | Change in price year on year | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Estimated total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|------------------------------|-----------------------------|-----------------------------|------------------------|----------------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 2 | | | | 35 | 95% | 36 | \$72,726 |
| Merlot | 2 | | | | 15 | 87% | 17 | \$25,725 |
| Montepulciano | | | | | 2 | 100% | 2 | \$3,972 |
| Pinot Meunier | | | | | 1 | 100% | 1 | \$1,351 |
| Pinot Noir | | | | | 2 | 100% | 2 | \$3,275 |
| Shiraz | 6 | | | | 27 | 81% | 33 | \$54,577 |
| Tempranillo | 2 | | | | | | 2 | \$2,240 |
| Red Total | 12 | | | | 81 | 87% | 92 | \$163,866 |
| White | | | | | | | | |
| Chardonnay | | | | | 16 | 100% | 16 | \$19,350 |
| Pinot Gris/Grigio | 2 | | | | 21 | 92% | 23 | \$27,894 |
| Riesling | | | | | 4 | 100% | 4 | \$5,301 |
| Sauvignon Blanc | 2 | | | | 17 | 91% | 19 | \$26,242 |
| Other white | | | | | 5 | 100% | 5 | \$6,663 |
| White Total | 4 | | | | 63 | 95% | 67 | \$85,449 |
| Grand Total | 15 | | | | 144 | 90% | 159 | \$249,315 |

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

Kangaroo Island

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|----------|----------|----------|------------|-------------------|
| Red varieties | | | | | | |
| Cabernet Franc | 4 | 0 | 0 | 0 | 4 | 0% |
| Cabernet Sauvignon | 43 | 0 | 0 | 0 | 43 | 0% |
| Grenache | 1 | 0 | 0 | 0 | 1 | 0% |
| Malbec | 3 | 0 | 0 | 0 | 3 | 0% |
| Merlot | 4 | 0 | 0 | 0 | 4 | 0% |
| Pinot Noir | 1 | 0 | 0 | 0 | 1 | 0% |
| Shiraz | 44 | 0 | 0 | 0 | 44 | 0% |
| Other Red | 4 | 0 | 0 | 0 | 4 | 0% |
| Total red varieties | 104 | 0 | 0 | 0 | 104 | 0% |
| White varieties | | | | | | |
| Chardonnay | 9 | 0 | 0 | 0 | 9 | 0% |
| Pinot Gris | 1 | 0 | 0 | 0 | 1 | 0% |
| Riesling | 3 | 0 | 0 | 0 | 3 | 0% |
| Sauvignon Blanc | 9 | 0 | 0 | 0 | 9 | 0% |
| Semillon | 1 | 0 | 0 | 0 | 1 | 0% |
| Other White | 4 | 0 | 0 | 0 | 4 | 0% |
| Total white varieties | 27 | 0 | 0 | 0 | 27 | 0% |
| Unknown variety | 15 | 0 | 0 | 0 | 15 | 0% |
| Total all varieties | 146 | 0 | 0 | 0 | 146 | 0% |

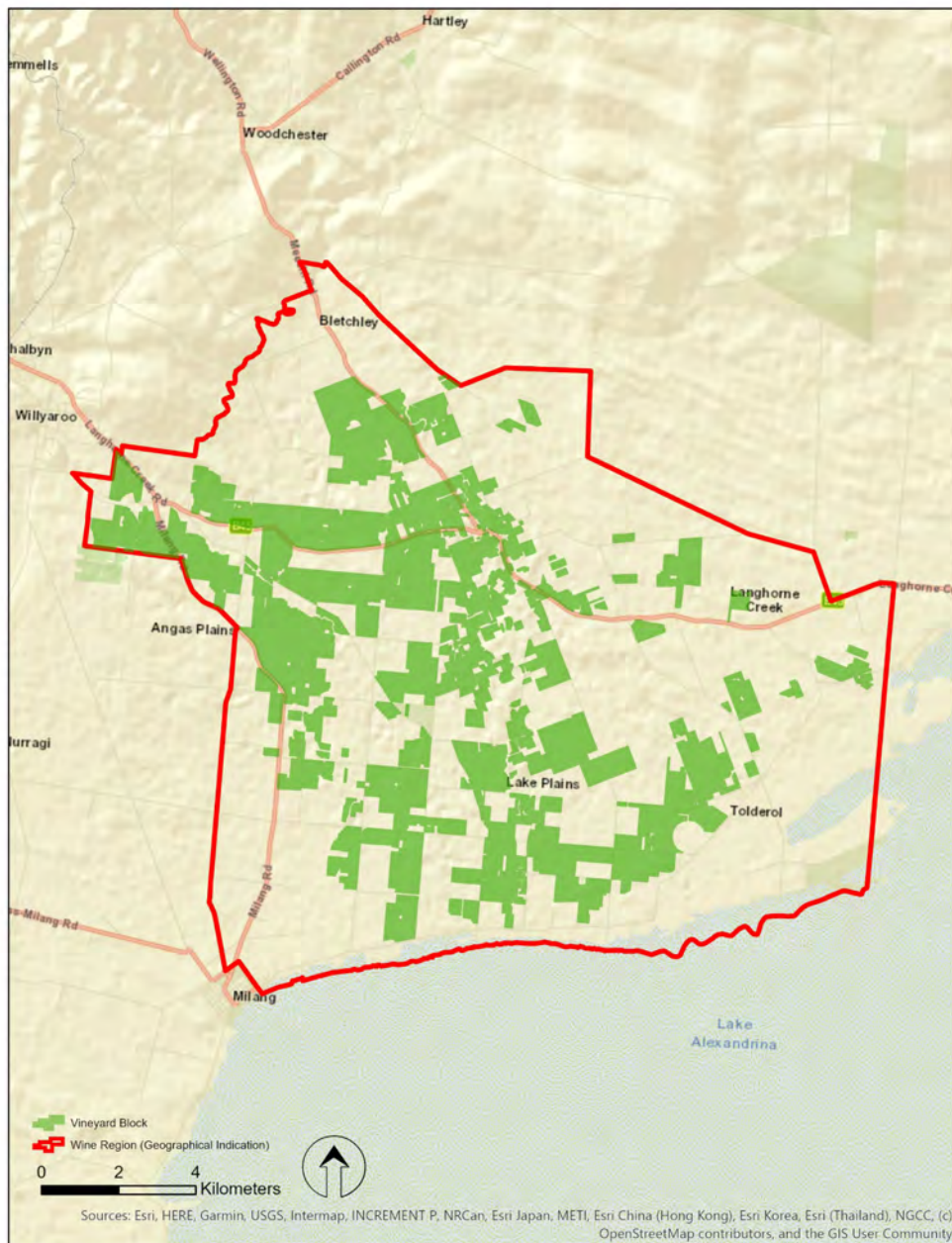
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Langhorne Creek Wine Region

Wine Australia July 2021



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

Langhorne Creek
Wine Region



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Langhorne Creek

Vintage overview

VINTAGE REPORT

In Langhorne Creek early winter rainfall was light but regular. While the vines did not get a deep drink, grass growth was good and cover crops (including hay) grew beautifully. This was very useful ground cover and mulch to retain moisture given the dry late-winter, spring and early summer.

The warm and dry spring was challenging for irrigation but good for flowering, aiding good fruit set in all varieties leading to relatively even berry development, making harvest decisions easy. The summer was generally quite cool, but two intensely hot periods 10-12th of January and again the 24th & 25th of January led to sunburn and crop loss from shrivel in some blocks. Showery rain in January and February helped nurse the vines through to harvest.

As usual, cooling breezes from 'The Lake' helped to maintain excellent natural acidity, with Langhorne Creek nights considerably cooler than all other central regions, including all but the coolest parts of the Adelaide Hills.

The pace of the vintage was steady and many wineries continued crushing through until mid-April. The steady harvest pattern allowed full ripeness for medium and full-bodied wines with most red fruit being ready for harvest with good colour, tannin and acidity at 12.5-13.5 Baumé. The cool vintage additionally resulted in varietally expressive, balanced whites with excellent natural acid retention.

The above average yields more than made up for last year's short fall, and the even fruit set and berry development led to excellent vine balance.

The star variety this season is Cabernet Sauvignon. Wine quality at this early stage is as good as we have experienced in Langhorne Creek, probably on par with 2012 and 2016. The fresh fruit flavour apparent in the wines now is magnificent.

Lian Jaensch – Langhorne Creek Grape and Wine Incorporated

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Langhorne Creek was 53,523 tonnes in 2021, more than double the very low crop in 2020. Over the past five years (up to 2020), the average crush for Langhorne Creek has been 46,259 tonnes, making this year's crush 16 per cent above the five-year average.

There were 51 respondents to the survey who reported crushing grapes from Langhorne Creek in 2021, compared with 49 in 2020.

The total estimated value of winegrapes from Langhorne Creek in 2021 was \$50.7 million compared with \$27 million in 2020, an increase of 86 per cent. The increase in production was partly offset by an overall decrease in the average purchase value of grapes, which decreased by 16 per cent from \$1137 per tonne in 2020 to \$953 per tonne.

There were decreases in average value for the major red varieties: Shiraz down by 17 per cent to \$1037 per tonne, Cabernet Sauvignon down 21 per cent to \$961 per tonne and Merlot down by 22 per cent to \$776 per tonne. Average values for white varieties increased: Chardonnay up 4 per cent to \$669 per tonne, Pinot Gris/Grigio up 6 per cent to \$991 and Sauvignon Blanc up 10 per cent to \$862 per tonne.

The price dispersion data shows a downward shift in prices, with 62 per cent of grapes purchased at \$900-\$1500 per tonne compared with 79 per cent in 2020.

According to Vinehealth Australia data, the total vineyard area in Langhorne Creek as at 30 April 2021 is 5996 hectares, compared with 5924 hectares in 2020. The total area is around 200 hectares more than it was 5 years ago.

There were 46 hectares of new plantings in Langhorne Creek in the 2020-21 planting season, all of which were Shiraz or Cabernet Sauvignon.

Langhorne Creek

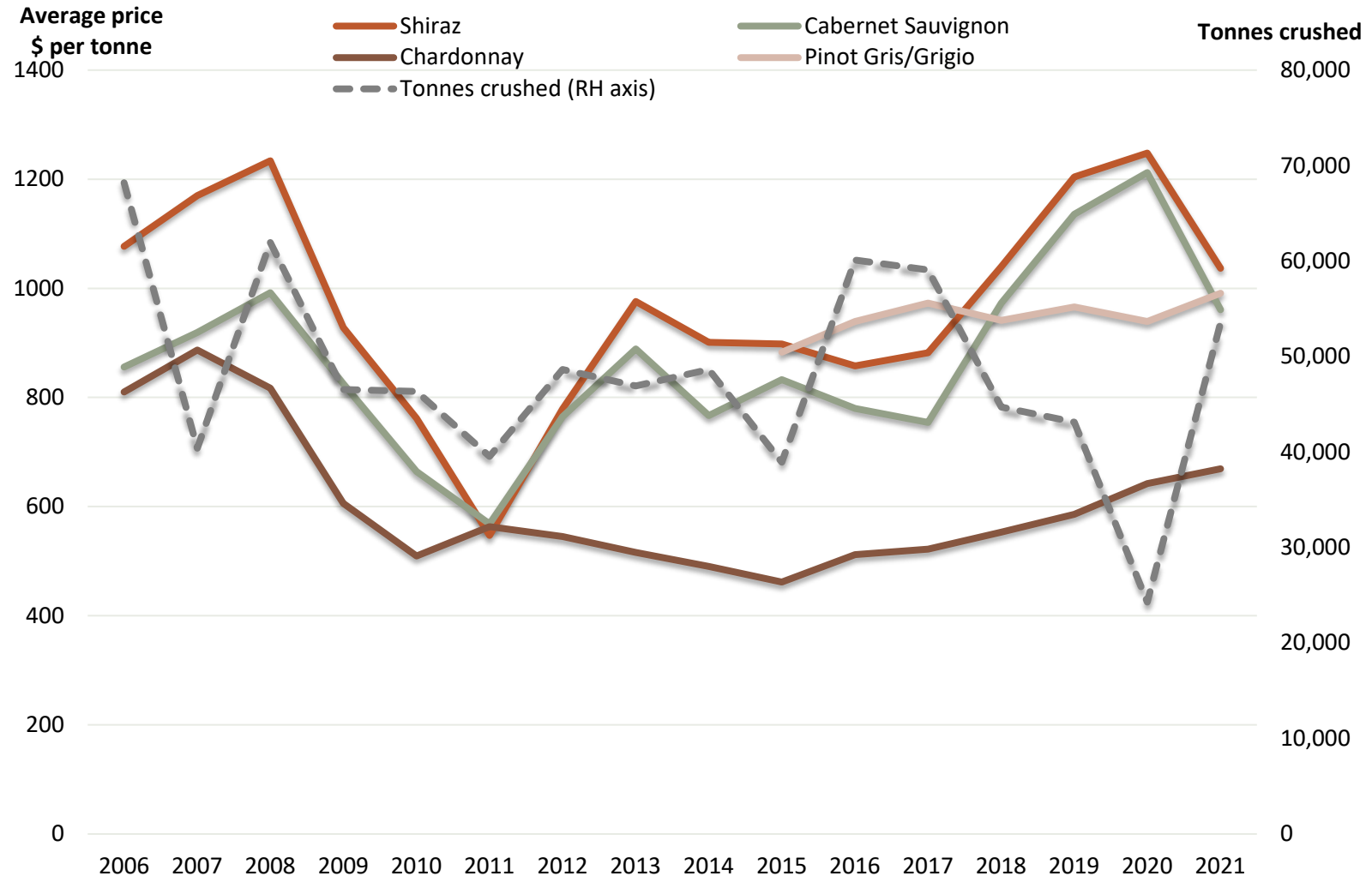
Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|-------------------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Barbera | 15 | \$16,974 | \$1,101 | 0% | | | 15 | \$16,974 |
| Cabernet Franc | 8 | | | | 18 | 69% | 26 | \$26,080 |
| Cabernet Sauvignon | 10,206 | \$9,795,676 | \$961 | -21% | 4,903 | 32% | 15,109 | \$14,506,868 |
| Durif | 12 | | | | 336 | 96% | 349 | \$331,389 |
| Graciano | | | | | 7 | 100% | 7 | \$13,396 |
| Grenache | 133 | \$132,373 | \$994 | 13% | 882 | 87% | 1,015 | \$1,009,611 |
| Lagrein | 49 | \$53,091 | \$1,079 | 0% | | | 49 | \$53,091 |
| Malbec | 353 | \$456,212 | \$1,292 | 1% | 35 | 9% | 388 | \$501,759 |
| Mataro/Mourvedre | 53 | | | | 12 | 18% | 65 | \$66,283 |
| Merlot | 2,316 | \$1,797,302 | \$776 | -22% | 2,081 | 47% | 4,398 | \$3,412,236 |
| Montepulciano | 3 | | | | 21 | 87% | 24 | \$55,993 |
| Nero d'Avola | | | | | 1 | 100% | 1 | \$2,936 |
| Petit Verdot | 57 | | | | 37 | 39% | 93 | \$90,164 |
| Pinot Meunier | 95 | | | | | | 95 | \$85,896 |
| Pinot Noir | 753 | \$757,310 | \$1,005 | 2% | 380 | 34% | 1,133 | \$1,139,348 |
| Ruby Cabernet | | | | | 7 | 100% | 7 | \$7,000 |
| Sangiovese | 139 | \$179,379 | \$1,287 | 7% | 12 | 8% | 152 | \$195,417 |
| Shiraz | 15,214 | \$15,783,481 | \$1,037 | -17% | 6,350 | 29% | 21,565 | \$22,371,412 |
| Tempranillo | 35 | \$37,859 | \$1,092 | 0% | 5 | 13% | 40 | \$43,527 |
| Touriga Nacional | 16 | | | | | | 16 | \$27,900 |
| Other red | 91 | \$77,940 | \$853 | 7% | 2 | 2% | 93 | \$82,205 |
| Red Total | 29,551 | \$29,337,605 | \$993 | -18% | 15,090 | 34% | 44,641 | \$44,039,483 |
| White | | | | | | | | |
| Chardonnay | 4,010 | \$2,682,510 | \$669 | 4% | 522 | 12% | 4,532 | \$3,031,865 |
| Fiano | 11 | | | | 4 | 29% | 15 | \$26,255 |
| Muscat à petits grains blancs | 17 | | | | 14 | 46% | 31 | \$20,280 |
| Pinot Gris/Grigio | 668 | \$662,347 | \$991 | 6% | 166 | 20% | 834 | \$827,047 |
| Riesling | 71 | | | | 2,041 | 97% | 2,112 | \$1,590,761 |
| Sauvignon Blanc | 712 | \$614,306 | \$862 | 10% | 453 | 39% | 1,166 | \$1,005,064 |
| Verdelho | 15 | | | | 48 | 76% | 63 | \$50,628 |
| Vermentino | 63 | \$82,867 | \$1,318 | 0% | 9 | 13% | 72 | \$94,997 |
| Viognier | 56 | | | | | | 56 | \$36,556 |
| White Total | 5,623 | \$4,173,786 | \$742 | 4% | 3,259 | 37% | 8,882 | \$6,683,453 |
| Grand Total | 35,174 | \$33,511,391 | \$953 | -16% | 18,349 | 34% | 53,523 | \$50,722,936 |

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

Langhorne Creek

Historical weighted average price vs tonnes crushed



Langhorne Creek

Price dispersion – purchased grapes

| | Tonnes purchased in each price segment | | | | | Total tonnes purchased |
|-------------------------------|--|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | | |
| Barbera | | | 15 | | | 15 |
| Cabernet Franc | | | 8 | | | 8 |
| Cabernet Sauvignon | 238 | 2,494 | 7,418 | | 56 | 10,206 |
| Durif | | | 12 | | | 12 |
| Grenache | | 82 | 41 | 10 | | 133 |
| Lagrein | 8 | | 42 | | | 49 |
| Malbec | | 7 | 275 | 67 | 4 | 353 |
| Mataro/Mourvedre | | | 53 | | | 53 |
| Merlot | | 1,836 | 480 | | | 2,316 |
| Montepulciano | | | | | 3 | 3 |
| Petit Verdot | | | 57 | | | 57 |
| Pinot Meunier | | | 95 | | | 95 |
| Pinot Noir | | 60 | 693 | | | 753 |
| Sangiovese | | | 139 | | | 139 |
| Shiraz | 1,018 | 2,438 | 11,392 | 90 | 277 | 15,214 |
| Tempranillo | | | 35 | | | 35 |
| Touriga Nacional | | | | 16 | | 16 |
| Other red | | 54 | 37 | | | 91 |
| Red Total | 1,263 | 6,972 | 20,794 | 182 | 340 | 29,551 |
| White | | | | | | |
| Chardonnay | 747 | 3,263 | | | | 4,010 |
| Fiano | | | | 11 | | 11 |
| Muscat à petits grains blancs | | 17 | | | | 17 |
| Pinot Gris/Grigio | | | 668 | | | 668 |
| Riesling | | 71 | | | | 71 |
| Sauvignon Blanc | | 318 | 395 | | | 712 |
| Verdelho | | 15 | | | | 15 |
| Vermentino | | | 63 | | | 63 |
| Viognier | | 56 | | | | 56 |
| White Total | 747 | 3,740 | 1,126 | 11 | | 5,623 |
| Total purchased | 2,010 | 10,712 | 21,919 | 193 | 340 | 35,174 |

Langhorne Creek

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|--------------|-----------|-----------|-----------|--------------|-------------------|
| Red winegrapes | | | | | | |
| Cabernet Franc | 9 | 0 | 0 | 0 | 9 | 0% |
| Cabernet Sauvignon | 1,950 | 38 | 23 | 12 | 2,023 | 1% |
| Dolcetto | 8 | 0 | 0 | 0 | 8 | 0% |
| Durif (Petite Sirah) | 7 | 0 | 0 | 0 | 7 | 0% |
| Grenache | 78 | 0 | 0 | 0 | 78 | 0% |
| Lagrein | 10 | 0 | 0 | 0 | 10 | 0% |
| Malbec | 106 | 0 | 0 | 0 | 106 | 0% |
| Mataro (Mourvedre) | 8 | 0 | 0 | 0 | 8 | 0% |
| Merlot | 375 | 0 | 0 | 0 | 375 | 0% |
| Petit Verdot | 10 | 0 | 0 | 0 | 10 | 0% |
| Pinot Noir | 100 | 0 | 0 | 0 | 100 | 0% |
| Sangiovese | 15 | 0 | 0 | 0 | 15 | 0% |
| Shiraz | 2,251 | 61 | 13 | 34 | 2,359 | 1% |
| Tempranillo | 5 | 0 | 0 | 0 | 5 | 0% |
| Zinfandel | 7 | 0 | 0 | 0 | 7 | 0% |
| Other Red | 20 | 0 | 0 | 0 | 20 | 0% |
| Total red varieties | 4,959 | 99 | 36 | 46 | 5,140 | 1% |
| White winegrapes | | | | | | |
| Chardonnay | 463 | 0 | 0 | 0 | 463 | 0% |
| Fiano | 9 | 0 | 2 | 0 | 11 | 0% |
| Pinot Gris | 50 | 0 | 0 | 0 | 50 | 0% |
| Riesling | 160 | 0 | 0 | 0 | 160 | 0% |
| Sauvignon Blanc | 75 | 0 | 0 | 0 | 75 | 0% |
| Semillon | 1 | 0 | 0 | 0 | 1 | 0% |
| Verdelho | 8 | 0 | 0 | 0 | 8 | 0% |
| Other White | 32 | 0 | 0 | 0 | 32 | 0% |
| Total white varieties | 798 | 0 | 2 | 0 | 800 | 0% |
| Rootstock Block | 6 | 0 | 0 | 0 | 6 | 0% |
| Unknown variety | 50 | 0 | 0 | 0 | 50 | 0% |
| Total all varieties | 5,813 | 99 | 38 | 46 | 5,996 | 1% |

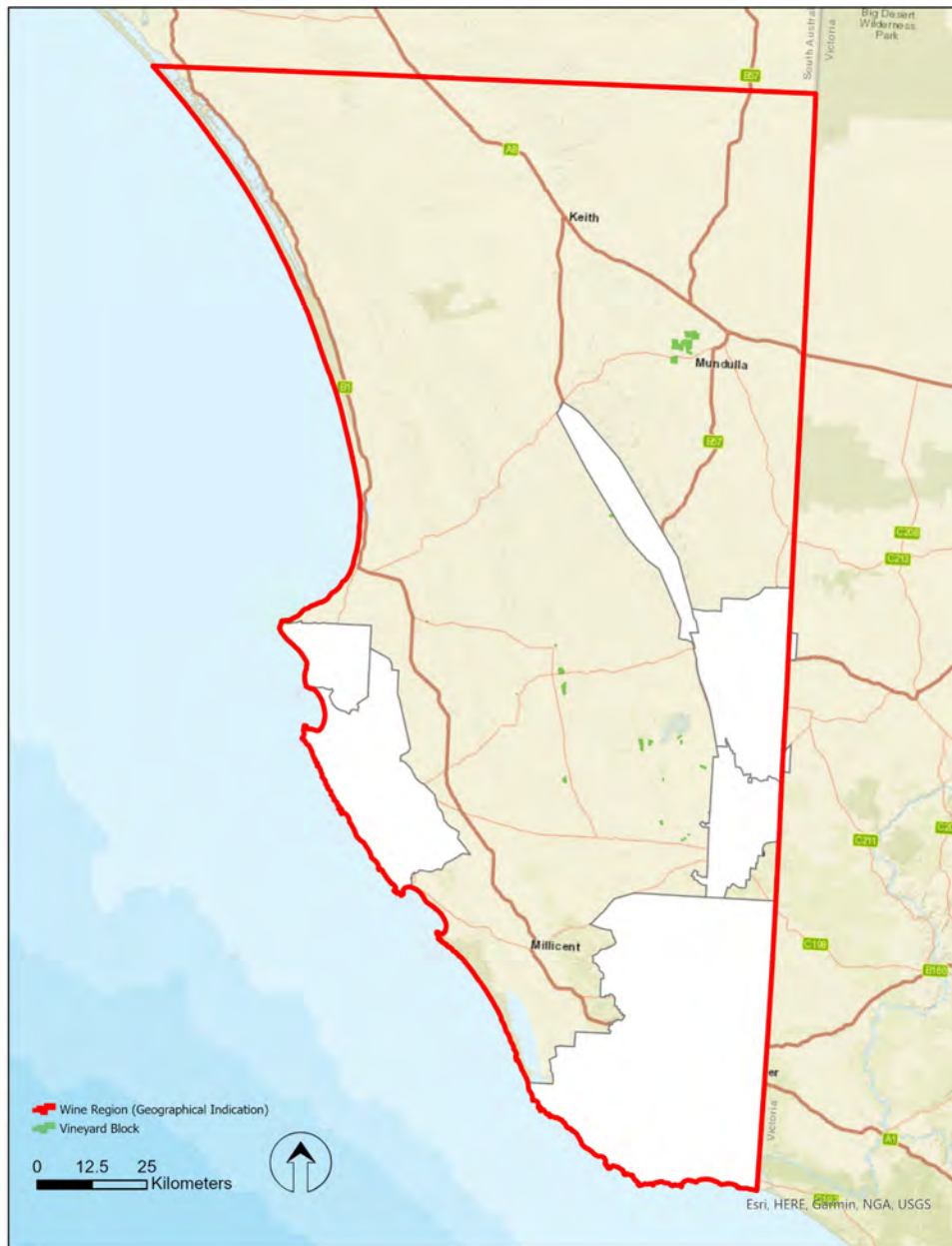
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Limestone Coast zone – other

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 06th July 2021
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

**Limestone Coast
Wine Zone**



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Limestone Coast zone – other

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Cabernet Franc | 51 | | | | 201 | 80% | 251 | \$215,256 |
| Cabernet Sauvignon | 2,230 | \$1,920,654 | \$861 | -23% | 4,193 | 65% | 6,423 | \$5,532,690 |
| Lagrein | 4 | | | | 5 | 57% | 9 | \$10,142 |
| Malbec | 65 | | | | 170 | 72% | 235 | \$183,204 |
| Mataro/Mourvedre | 313 | | | | 369 | 54% | 683 | \$515,692 |
| Merlot | 671 | \$524,015 | \$782 | -6% | 1,672 | 71% | 2,343 | \$1,831,030 |
| Montepulciano | 7 | | | | 5 | 42% | 12 | \$16,926 |
| Petit Verdot | 216 | | | | 383 | 64% | 599 | \$422,392 |
| Pinot Noir | 128 | \$203,604 | \$1,590 | 21% | 3 | 2% | 131 | \$208,333 |
| Shiraz | 2,469 | \$2,281,717 | \$924 | -13% | 2,586 | 51% | 5,055 | \$4,671,794 |
| Tempranillo | 6 | | | | 17 | 74% | 23 | \$32,788 |
| Other red | 93 | \$82,950 | \$891 | -5% | | | 93 | \$82,950 |
| Red Total | 6,253 | \$5,518,880 | \$883 | -14% | 9,606 | 61% | 15,859 | \$13,723,199 |
| White | | | | | | | | |
| Chardonnay | 486 | \$354,147 | \$729 | 11% | 1,270 | 72% | 1,756 | \$1,280,705 |
| Pinot Gris/Grigio | 130 | \$125,506 | \$962 | 0% | | | 130 | \$125,506 |
| Prosecco | 35 | | | | | | 35 | \$48,562 |
| Sauvignon Blanc | 16 | | | | | | 16 | \$10,368 |
| Semillon | 11 | | | | | | 11 | \$6,600 |
| Verdelho | | | | | 7 | 100% | 7 | \$7,382 |
| White Total | 678 | \$545,182 | \$804 | 6% | 1,277 | 65% | 1,955 | \$1,479,123 |
| Grand Total | 6,931 | \$6,064,062 | \$875 | -12% | 10,883 | 61% | 17,814 | \$15,202,323 |

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

Limestone Coast zone – other

Price dispersion – purchased grapes

| | Tonnes purchased by price segment | | | | Total tonnes purchased |
|--------------------|-----------------------------------|--------------|---------------|----------------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | |
| Red | | | | | |
| Cabernet Franc | | 51 | | | 51 |
| Cabernet Sauvignon | 169 | 1,318 | 733 | 10 | 2,230 |
| Lagrein | | | 4 | | 4 |
| Malbec | | 65 | | | 65 |
| Mataro/Mourvedre | | 313 | | | 313 |
| Merlot | | 640 | 31 | | 671 |
| Montepulciano | | | 7 | | 7 |
| Petit Verdot | | 216 | | | 216 |
| Pinot Noir | | 7 | 15 | 105 | 128 |
| Shiraz | | 824 | 1,531 | 114 | 2,469 |
| Tempranillo | | | 6 | | 6 |
| Other red | | 51 | 42 | | 93 |
| Red Total | 169 | 3,485 | 2,370 | 229 | 6,253 |
| White | | | | | |
| Chardonnay | | 486 | | | 486 |
| Pinot Gris/Grigio | | 26 | 105 | | 130 |
| Prosecco | | | 14 | 21 | 35 |
| Sauvignon Blanc | | 16 | | | 16 |
| Semillon | | 11 | | | 11 |
| White Total | | 538 | 119 | 21 | 678 |
| Total purchased | 169 | 4,023 | 2,489 | 250 | 6,931 |

Limestone Coast zone – other

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|--------------|----------|----------|----------|--------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Franc | 31 | 0 | 0 | 0 | 31 | 0% |
| Cabernet Sauvignon | 752 | 0 | 0 | 0 | 752 | 0% |
| Merlot | 264 | 0 | 0 | 0 | 264 | 0% |
| Petit Verdot | 46 | 0 | 0 | 0 | 46 | 0% |
| Pinot Noir | 11 | 0 | 0 | 0 | 11 | 0% |
| Shiraz | 473 | 0 | 0 | 3 | 476 | 1% |
| Other Red | 82 | 0 | 0 | 0 | 82 | 0% |
| Total red varieties | 1,659 | 0 | 0 | 3 | 1,662 | 0% |
| White winegrapes | | | | | | |
| Chardonnay | 129 | 0 | 0 | 0 | 129 | 0% |
| Pinot Gris | 13 | 0 | 0 | 0 | 13 | 0% |
| Riesling | 4 | 0 | 0 | 0 | 4 | 0% |
| Sauvignon Blanc | 17 | 0 | 0 | 0 | 17 | 0% |
| Semillon | 7 | 0 | 0 | 0 | 7 | 0% |
| Other White | 10 | 0 | 0 | 0 | 10 | 0% |
| Total white varieties | 180 | 0 | 0 | 0 | 180 | 0% |
| Unknown | 0 | 0 | 0 | 0 | 0 | 0% |
| Total all varieties | 1,839 | 0 | 0 | 3 | 1,842 | 0% |

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2021

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2021

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

McLaren Vale Wine Region



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McLaren Vale

Vintage overview

VINTAGE REPORT

The local wine community is heralding Vintage 2021 as one of the best of the century. Vineyards in the McLaren Vale Wine Region were generally more productive, producing higher yields at harvest, compared to recent seasons. Importantly the increase in vine yields was combined with excellent quality which was well received by the region's winemakers.

Overall, the season was average for rainfall, but rain fell primarily early in the growing season well before there was ripening fruit which can be damaged by wet weather. The weather was also warmer than average for both daytime and night-time temperatures.

November 2020 was the driest since 1990 and was a definite hard end to Spring. November also proved to have the equal highest average daily maximum temperature for the growing season (27.5°C tied with January). This is a rare occurrence. One of the warmest days for the season was on November 27th which was 38.8°C.

There was mild weather through December. There were only two days above 35°C. January was slightly hotter but still below average. The temperatures in February were ideal with no days above 35°C and temperatures staying around the high 20s and low 30s each day.

Veraison in red grapes and softening in whites was later than typical, early February, and ripening was steady. There were a few rain events of 10-20mm during ripening, but this had only a minor effect on harvest.

It was a long, drawn out vintage compared to what has been the recent experience. Grape picking took 8 weeks to complete starting at full pace in the first week of March and ending in the second week of April. The reports from winemakers on wine quality has been good, with winemaking made easier by cool weather and gentle ripening.

James Hook, for McLaren Vale Grape, Wine and Tourism Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from McLaren Vale was 36,659 tonnes in 2021, up by 28 per cent compared with the 2020 reported crush of 28,751 tonnes. The crush was almost identical to the five-year average (2016–2020) of 36,653 tonnes. McLaren Vale slipped from third-largest to sixth-largest region by reported crush size in 2021 as other regions had larger yield increases.

There were 85 respondents to the survey who reported crushing grapes from McLaren Vale in 2021, the same number as last year. Despite this, it is known that the non-response rate in terms of tonnes is relatively high in this region and the true crush is likely to be closer to 50,000 tonnes.

The total estimated value of winegrapes from McLaren Vale in 2021 was just under \$72 million compared with \$56 million in 2020. There was virtually no overall change in the average value, which was \$1946 per tonne in 2021, compared with \$1951 per tonne in 2020.

There were small decreases in average value for Shiraz (down 1 per cent to \$2076 per tonne) and Cabernet Sauvignon (down 4 per cent to \$1916 per tonne) while Grenache increased by 7 per cent to \$2311 and Chardonnay increased by 3 per cent to \$1033 per tonne. Grenache consolidated its position as the highest value variety in McLaren Vale.

The price dispersion data shows a similar distribution to last year, with 46 per cent of red grapes purchased at \$2000 per tonne and above, compared with 44 per cent last year.

According to Vinehealth Australia data, the total vineyard area in McLaren Vale as at 30 April 2021 is 7414 hectares, compared with 7349 hectares in 2019. The total area is around 50 hectares more than it was 5 years ago.

There were 85 hectares of new plantings (including top-working and replacements) in the 2020-21 planting season, the majority being Shiraz.

McLaren Vale

Winegrape intake summary table – reds

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Barbera | 3 | | | | 5 | 60% | 8 | \$12,750 |
| Cabernet Franc | 44 | \$58,701 | \$1,349 | -24% | 12 | 22% | 56 | \$75,551 |
| Cabernet Sauvignon | 3,260 | \$6,247,704 | \$1,916 | -4% | 2,574 | 44% | 5,834 | \$11,179,550 |
| Durif | 15 | \$21,534 | \$1,475 | -21% | 9 | 37% | 23 | \$34,145 |
| Graciano | 16 | \$35,727 | \$2,205 | 13% | 36 | 69% | 52 | \$114,315 |
| Grenache | 1,126 | \$2,600,886 | \$2,311 | 7% | 916 | 45% | 2,042 | \$4,718,186 |
| Lagrein | | | | | 5 | 100% | 5 | \$6,615 |
| Malbec | 11 | \$19,618 | \$1,827 | -2% | 12 | 52% | 23 | \$41,297 |
| Mataro/Mourvedre | 457 | \$815,420 | \$1,784 | -5% | 196 | 30% | 653 | \$1,165,344 |
| Merlot | 569 | \$714,857 | \$1,256 | 5% | 427 | 43% | 996 | \$1,251,439 |
| Montepulciano | 19 | \$32,446 | \$1,693 | -5% | 17 | 46% | 36 | \$60,382 |
| Nebbiolo | 0 | | | | 6 | 94% | 6 | \$19,200 |
| Nero d'Avola | 30 | \$68,165 | \$2,298 | -6% | 53 | 64% | 83 | \$189,908 |
| Petit Verdot | 60 | \$71,210 | \$1,187 | 22% | 202 | 77% | 262 | \$311,156 |
| Pinot Noir | 266 | \$319,225 | \$1,198 | 3% | | | 266 | \$319,225 |
| Sangiovese | 244 | \$399,339 | \$1,639 | -6% | 169 | 41% | 413 | \$676,849 |
| Shiraz | 14,103 | \$29,273,883 | \$2,076 | -1% | 8,718 | 38% | 22,821 | \$47,369,092 |
| Tempranillo | 184 | \$354,071 | \$1,922 | 5% | 135 | 42% | 320 | \$613,833 |
| Touriga Nacional | 29 | \$59,508 | \$2,086 | 0% | 71 | 71% | 100 | \$208,540 |
| Other red | 96 | \$188,489 | \$1,966 | 1% | 223 | 70% | 318 | \$582,592 |
| Red Total | 20,532 | \$41,287,084 | \$2,011 | -1% | 13,785 | 40% | 34,317 | \$68,949,970 |

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

McLaren Vale

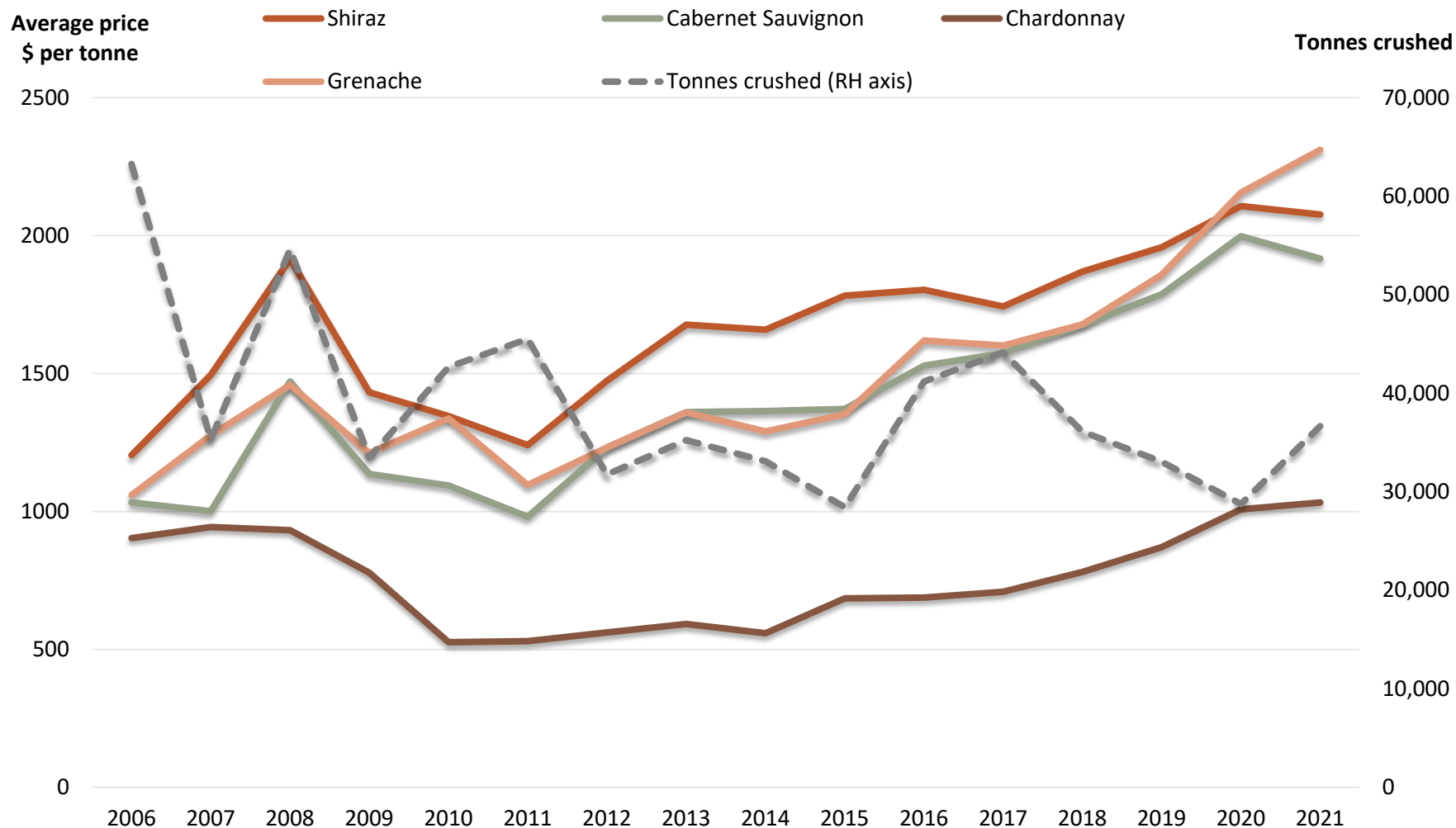
Winegrape intake summary table – whites

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|-------------------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| White | | | | | | | | |
| Chardonnay | 1,070 | \$1,105,490 | \$1,033 | 3% | 149 | 12% | 1,219 | \$1,259,448 |
| Chenin blanc | 95 | \$143,300 | \$1,501 | 0% | 33 | 26% | 128 | \$192,714 |
| Fiano | 23 | \$43,464 | \$1,865 | 14% | 119 | 84% | 142 | \$265,101 |
| Marsanne | 57 | | | | 56 | 49% | 114 | \$182,201 |
| Muscat à petits grains blancs | 36 | | | | 9 | 19% | 44 | \$54,320 |
| Muscat Gordo Blanco | | | | | 3 | 100% | 3 | \$3,440 |
| Pinot Gris/Grigio | | | | | 96 | 100% | 96 | \$121,106 |
| Prosecco | 8 | | | | 15 | 65% | 23 | \$36,175 |
| Riesling | 102 | \$132,159 | \$1,294 | 5% | | | 102 | \$132,159 |
| Roussanne | 18 | | | | 32 | 65% | 49 | \$49,390 |
| Sauvignon Blanc | 21 | \$23,584 | \$1,099 | -3% | 27 | 56% | 49 | \$53,300 |
| Verdelho | 105 | | | | 4 | 3% | 109 | \$103,058 |
| Vermentino | 31 | \$66,690 | \$2,185 | -22% | 38 | 55% | 68 | \$149,440 |
| Viognier | 99 | \$151,192 | \$1,527 | 10% | 58 | 37% | 157 | \$239,247 |
| Other white | 12 | | | | 27 | 70% | 38 | \$50,105 |
| White Total | 1,678 | \$1,949,580 | \$1,162 | 3% | 664 | 28% | 2,342 | \$2,891,203 |
| Grand Total | 22,209 | \$43,236,664 | \$1,946 | -0% | 14,449 | 39% | 36,659 | \$71,841,173 |

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

McLaren Vale

Historical weighted average price vs tonnes crushed



McLaren Vale

Price dispersion – purchased grapes (reds)

| | Tonnes purchased in each price segment | | | | | Total tonnes purchased |
|--------------------|--|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | | |
| Barbera | | | | 3 | | 3 |
| Cabernet Franc | 17 | | | 16 | 10 | 44 |
| Cabernet Sauvignon | 14 | 48 | 269 | 1,751 | 1,177 | 3,260 |
| Durif | 2 | | 8 | 3 | 2 | 15 |
| Graciano | | | | | 15 | 15 |
| Grenache | 2 | 5 | 46 | 174 | 894 | 1,120 |
| Malbec | | | | 11 | | 11 |
| Mataro/Mourvedre | | | 10 | 330 | 117 | 457 |
| Merlot | 12 | 10 | 436 | 107 | 4 | 569 |
| Montepulciano | | | | 19 | | 19 |
| Nebbiolo | | | | | 0 | 0 |
| Nero d'Avola | | | | | 30 | 30 |
| Petit Verdot | | | 45 | 13 | 2 | 60 |
| Pinot Noir | | | 240 | 21 | 5 | 266 |
| Sangiovese | | | 108 | 102 | 35 | 244 |
| Shiraz | 79 | 59 | 676 | 5,496 | 7,744 | 14,054 |
| Tempranillo | | | | 93 | 91 | 184 |
| Touriga Nacional | | | | 6 | 23 | 29 |
| Other red | | | | 27 | 69 | 96 |
| Red Total | 126 | 123 | 1,838 | 8,172 | 10,217 | 20,476 |

McLaren Vale

Price dispersion – purchased grapes (whites)

| | Tonnes purchased in each price segment | | | | | Total tonnes purchased |
|-------------------------------|--|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| White | | | | | | |
| Chardonnay | 34 | 453 | 397 | 186 | | 1,070 |
| Chenin blanc | | | 4 | 91 | | 95 |
| Fiano | | | | 11 | 13 | 23 |
| Marsanne | | | | 57 | | 57 |
| Muscat à petits grains blancs | | | 34 | 1 | | 36 |
| Prosecco | | | 3 | 5 | | 8 |
| Riesling | | 11 | 42 | 49 | | 102 |
| Roussanne | | | 18 | | | 18 |
| Sauvignon Blanc | | | 21 | | | 21 |
| Verdelho | | 82 | 23 | | | 105 |
| Vermentino | | | | 18 | 13 | 31 |
| Viognier | | 16 | | 83 | 0 | 99 |
| Other white | | | | 11 | 1 | 12 |
| White Total | 34 | 562 | 543 | 513 | 26 | 1,678 |
| Total purchased | 160 | 685 | 2,381 | 8,685 | 10,242 | 22,153 |

McLaren Vale

Current plantings by variety and year planted – reds

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|----------------------------|--------------|-----------|-----------|-----------|--------------|-------------------------|
| Red winegrapes | | | | | | |
| Barbera | 11 | 0 | 0 | 0 | 11 | 0% |
| Cabernet Franc | 22 | 0 | 0 | 0 | 22 | 0% |
| Cabernet Sauvignon | 1,328 | 12 | 13 | 19 | 1,372 | 1% |
| Carignan | 4 | 1 | 0 | 0 | 5 | 0% |
| Cinsault | 3 | 0 | 0 | 0 | 3 | 0% |
| Durif (Petite Sirah) | 5 | 0 | 0 | 0 | 5 | 0% |
| Graciano | 5 | 0 | 0 | 1 | 6 | 17% |
| Grenache | 450 | 4 | 2 | 8 | 464 | 2% |
| Malbec | 11 | 1 | 0 | 0 | 12 | 0% |
| Mataro (Mourvedre) | 91 | 0 | 0 | 0 | 91 | 0% |
| Merlot | 186 | 0 | 0 | 0 | 186 | 0% |
| Montepulciano | 15 | 2 | 2 | 0 | 19 | 0% |
| Nero d'Avola | 19 | 0 | 2 | 0 | 21 | 0% |
| Other Red | 37 | 1 | 0 | 0 | 38 | 1% |
| Petit Verdot | 45 | 0 | 0 | 0 | 45 | 0% |
| Pinot Noir | 46 | 0 | 0 | 0 | 46 | 0% |
| Sagrantino | 7 | 0 | 0 | 0 | 7 | 0% |
| Sangiovese | 40 | 0 | 0 | 0 | 40 | 0% |
| Shiraz | 4,062 | 57 | 31 | 49 | 4,199 | 1% |
| Tempranillo | 64 | 0 | 0 | 2 | 66 | 3% |
| Touriga | 17 | 0 | 1 | 0 | 18 | 0% |
| Zinfandel | 4 | 0 | 0 | 0 | 4 | 0% |
| Total red varieties | 6,472 | 78 | 51 | 79 | 6,680 | 1% |

Source:
Vinehealth
Australia

McLaren Vale

Current plantings by variety and year planted – whites

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|--|--------------|-----------|-----------|-----------|--------------|-------------------------|
| White winegrapes | | | | | | |
| Aglianico | 3 | 0 | 1 | 1 | 5 | 20% |
| Chardonnay | 274 | 2 | 0 | 0 | 276 | 0% |
| Chenin Blanc | 15 | 0 | 0 | 0 | 15 | 0% |
| Fiano | 20 | 0 | 8 | 4 | 32 | 13% |
| Muscat A Petit Grains Blanc (White Frontignac) | 10 | 0 | 0 | 0 | 10 | 0% |
| Pinot Gris | 23 | 0 | 0 | 0 | 23 | 0% |
| Riesling | 31 | 0 | 0 | 0 | 31 | 0% |
| Rousanne | 12 | 0 | 0 | 0 | 12 | 0% |
| Sauvignon Blanc | 45 | 0 | 0 | 0 | 45 | 0% |
| Semillon | 17 | 0 | 0 | 0 | 17 | 0% |
| Verdelho | 14 | 0 | 0 | 0 | 14 | 0% |
| Vermentino | 4 | 0 | 0 | 1 | 5 | 20% |
| Viognier | 50 | 0 | 0 | 0 | 50 | 0% |
| Other White | 27 | 0 | 0 | 0 | 27 | 0% |
| Total white varieties | 545 | 2 | 9 | 6 | 562 | 1% |
| Rootstock Block | 4 | 0 | 0 | 0 | 4 | 0% |
| Multi-purpose white | 3 | 0 | 0 | 0 | 3 | 0% |
| Table red | 0 | 0 | 0 | 0 | 0 | 0% |
| Table white | 0 | 0 | 0 | 0 | 0 | 0% |
| Unknown variety | 165 | 0 | 0 | 0 | 165 | 0% |
| Total all varieties | 7,189 | 80 | 60 | 85 | 7,414 | 1% |

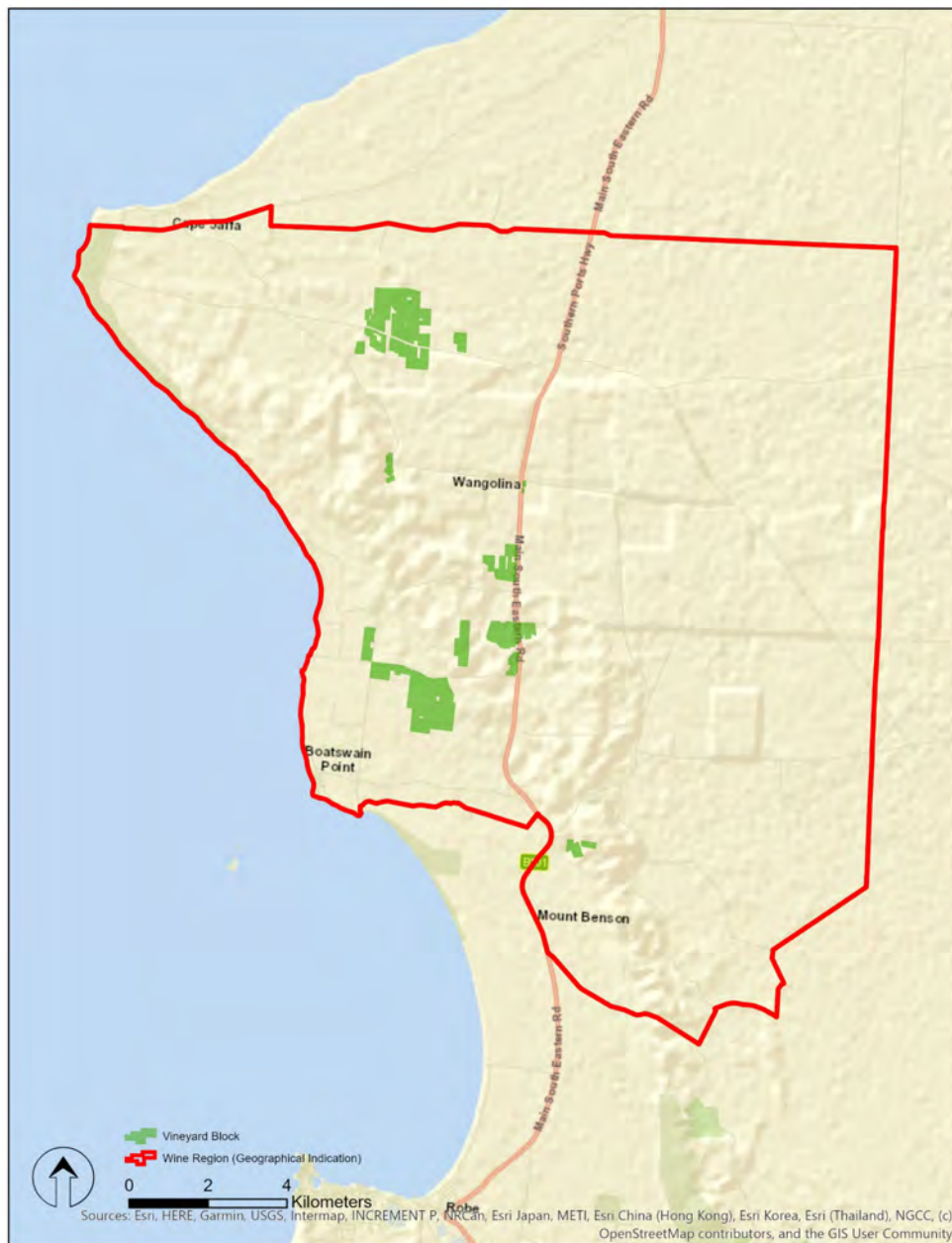
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Mount Benson Wine Region

Wine Australia July 2021



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

**Mount Benson
Wine Region**



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Mount Benson

Vintage overview

VINTAGE REPORT

Like many South Australian regions, the Mount Benson 2021 vintage is touted as a one in twenty for both quality and yield.

The season started with budburst from late August to early September, after a quite dry July and mild winter. The flowering period was warm and dry with minimal wind giving us a good even set. The season progressed to be overall quite mild, stable and with only minor rainfall events. The cooler conditions of the 2021 summer led to an extension of the season with slow accumulative ripening. There was just one day of reasonably intense heat in late January, with some vineyards experiencing the after-effects of heat stress (loss of leaf and yield).

Commencing in late February the white grapes' harvest produced much larger than expected yields in both Sauvignon Blanc and Pinot Gris. Flavour development in these two varieties was excellent with bright and vibrant aromatics showing. The red grape harvest commenced after Easter with the bulk of the red harvested in late April to early May at higher than average sugar levels. With high yielding crops demonstrating the hallmarks of outstanding quality, growers were happy and winemakers confident in the intense colour and depth that these wines show.

The region was unhampered by disease, with minimal disease pressure coming from the cooler and dry conditions of the vintage and the absence of our usual, early March sea fogs. As the season progressed, we did see some rain events that did not seem to hamper ripening.

Once again, the consistent cooler nature of the Mount Benson region has allowed the region to produce wines that display aromatic depth, bright colour in red wines, density and intensity. We look forward to these wines becoming available on the market. The 2021 Mount Benson vintage will be a vintage for drinkers and collectors alike

Anita Goode, Wangolina

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Mount Benson winegrapes was 2980 tonnes in 2021, up by 32 per cent compared with the 2020 crush of 2260 tonnes. Over the past five years (up to 2020), the average crush for Mount Benson has been 2429 tonnes, making this year's crush 23 per cent above the five-year average.

There were 10 respondents to the survey who reported crushing grapes from Mount Benson in 2021, the same as in 2020 and 2019.

The total estimated value of Mount Benson winegrapes in 2021 was just over \$3.5 million compared with \$3.2 million in 2020. The higher production was partly offset by a 15 per cent decrease in the average purchase value of grapes, which declined from \$1436 overall in 2020 to \$1219 per tonne.

There were decreases in average prices for the major red varieties, while the whites showed small increases. Cabernet Sauvignon decreased by 18 per cent to \$1396 per tonne and Shiraz decreased by 23 per cent to \$1260 per tonne. Pinot Gris/Grigio increased by 3 per cent to \$1159 per tonne, while Sauvignon Blanc increased by 2 per cent to \$1107 per tonne.

The price dispersion data shows that over half the grapes were purchased at between \$900 and \$1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in Mount Benson as at 30 April 2021 is 508 hectares, virtually identical to the area the previous year and 5 years ago.

Mount Benson has roughly twice the vineyard area of Mount Gambier, and two-thirds the area of Robe.

Mount Benson

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 364 | \$508,300 | \$1,396 | -18% | 161 | 31% | 525 | \$733,018 |
| Merlot | 115 | \$108,848 | \$945 | -3% | 201 | 64% | 316 | \$298,276 |
| Shiraz | 930 | \$1,172,077 | \$1,260 | -23% | 142 | 13% | 1,072 | \$1,351,444 |
| Red Total | 1,409 | \$1,789,225 | \$1,270 | -19% | 504 | 26% | 1,913 | \$2,382,738 |
| White | | | | | | | | |
| Chardonnay | 93 | | | | 265 | 74% | 359 | \$358,524 |
| Pinot Gris/Grigio | 183 | \$212,035 | \$1,159 | 3% | | | 183 | \$212,035 |
| Sauvignon Blanc | 324 | \$359,184 | \$1,107 | 2% | 191 | 37% | 516 | \$571,100 |
| Semillon | 10 | | | | | | 10 | \$7,795 |
| White Total | 610 | \$672,434 | \$1,101 | -1% | 456 | 43% | 1,067 | \$1,149,454 |
| Grand Total | 2,020 | \$2,461,659 | \$1,219 | -15% | 960 | 32% | 2,980 | \$3,532,192 |

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

Mount Benson

Price dispersion – purchased grapes

| | Tonnes purchased by price segment | | | | | Total tonnes purchased |
|--------------------|-----------------------------------|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | | |
| Cabernet Sauvignon | 12 | | 230 | 98 | 23 | 364 |
| Merlot | | 38 | 77 | | | 115 |
| Shiraz | 43 | 106 | 399 | 358 | 23 | 930 |
| Red Total | 55 | 144 | 707 | 456 | 47 | 1,409 |
| White | | | | | | |
| Chardonnay | | | 93 | | | 93 |
| Pinot Gris/Grigio | | | 178 | 5 | | 183 |
| Sauvignon Blanc | | | 324 | | | 324 |
| Semillon | | 10 | | | | 10 |
| White Total | | 10 | 596 | 5 | | 610 |
| Total purchased | 55 | 154 | 1,303 | 461 | 47 | 2,020 |

Mount Benson

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|----------|----------|----------|------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 115 | 0 | 0 | 0 | 115 | 0% |
| Merlot | 52 | 0 | 0 | 0 | 52 | 0% |
| Pinot Noir | 2 | 0 | 0 | 0 | 2 | 0% |
| Shiraz | 171 | 7 | 0 | 9 | 187 | 5% |
| Other red | 3 | 0 | 0 | 0 | 3 | 0% |
| Total red varieties | 343 | 7 | 0 | 9 | 359 | 3% |
| White winegrapes | | | | | | |
| Chardonnay | 34 | 0 | 0 | 0 | 34 | 0% |
| Pinot Gris | 43 | 0 | 0 | 0 | 43 | 0% |
| Sauvignon Blanc | 61 | 0 | 0 | 0 | 61 | 0% |
| Other White | 11 | 0 | 0 | 0 | 11 | 0% |
| Total white varieties | 149 | 0 | 0 | 0 | 149 | 0% |
| Unknown | 0 | 0 | 0 | 0 | 0 | 0% |
| Total all varieties | 492 | 7 | 0 | 9 | 508 | 2% |

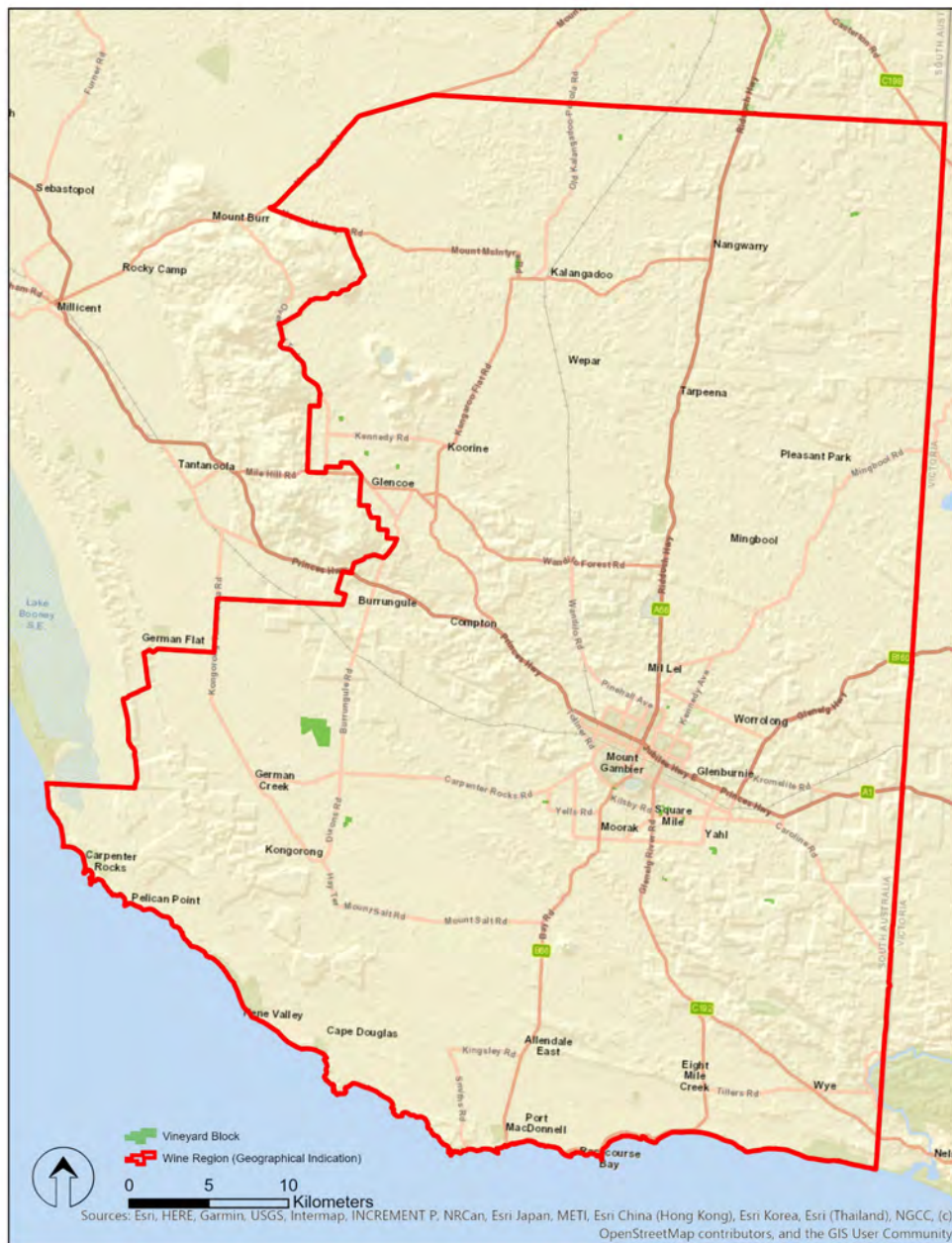
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Mount Gambier Wine Region

Wine Australia July 2021



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

Mount Gambier Wine Region



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Mount Gambier

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Pinot Noir | 158 | \$226,028 | \$1,432 | -2% | 8 | 5% | 166 | \$237,630 |
| Red Total | 158 | \$226,028 | \$1,432 | -2% | 8 | 5% | 166 | \$237,630 |
| White | | | | | | | | |
| Chardonnay | 99 | \$121,841 | \$1,229 | 5% | 3 | 2% | 102 | \$124,924 |
| Pinot Gris/Grigio | 11 | | | | 6 | 33% | 17 | \$25,455 |
| Riesling | 15 | | | | 9 | 39% | 24 | \$35,625 |
| Sauvignon Blanc | 510 | \$598,912 | \$1,174 | 2% | | | 510 | \$598,912 |
| White Total | 635 | \$759,603 | \$1,196 | 3% | 17 | 3% | 652 | \$784,916 |
| Grand Total | 793 | \$985,631 | \$1,243 | 3% | 25 | 3% | 818 | \$1,022,546 |

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

Mount Gambier

Price dispersion – purchased grapes

| | Tonnes purchased by price segment | | | Total tonnes purchased |
|-------------------|-----------------------------------|---------------|----------------|------------------------|
| Varieties | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | |
| Red | | | | |
| Pinot Noir | | 80 | 78 | 158 |
| Red Total | | 80 | 78 | 158 |
| White | | | | |
| Chardonnay | 14 | 56 | 29 | 99 |
| Pinot Gris/Grigio | | | 11 | 11 |
| Riesling | | | 15 | 15 |
| Sauvignon Blanc | 17 | 493 | | 510 |
| White Total | 30 | 550 | 55 | 635 |
| Total purchased | 30 | 629 | 133 | 793 |

Mount Gambier

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|----------|----------|----------|------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 9 | 0 | 0 | 0 | 9 | 0% |
| Pinot Noir | 67 | 0 | 0 | 0 | 67 | 0% |
| Other Red | 1 | 0 | 0 | 0 | 1 | 0% |
| Total red varieties | 77 | 0 | 0 | 0 | 77 | 0% |
| White winegrapes | | | | | | |
| Chardonnay | 40 | 0 | 0 | 0 | 40 | 0% |
| Pinot Gris | 14 | 0 | 0 | 0 | 14 | 0% |
| Sauvignon Blanc | 95 | 0 | 0 | 0 | 95 | 0% |
| Other White | 6 | 0 | 0 | 0 | 6 | 0% |
| Total white varieties | 155 | 0 | 0 | 0 | 155 | 0% |
| Unknown | 19 | 0 | 0 | 0 | 19 | 0% |
| Total all varieties | 251 | 0 | 0 | 0 | 251 | 0% |

Source:
Vinehealth
Australia

Padthaway

Vintage overview

VINTAGE REPORT

Padthaway has had an outstanding vintage, with fantastic growing conditions, fruit quality and quantity.

The consistency and stability of the weather during the growing season, with adequate rainfall over winter and then mild temperatures with minimal heat spikes during the growing season allowed the vines to regulate their vigour and provided great conditions for flowering and fruit set with very little vine stress. This resulted in even maturity at harvest and yields above the long-term average.

The 2021 Padthaway vintage started with Chardonnay for sparkling base on 12th Feb and concluded with Cabernet Sauvignon on 28th April. Winemakers' comments on the vintage are that they had to be patient in waiting for the whites to ripen and acid levels to be in balance with flavours. The resultant wines are vibrant with great flavours and natural acids.

The vintage conditions allowed the red fruit to ripen and winemakers to pick at optimum fruit ripeness. The reds have exceptional colour intensity and great fruit expression, firm acidity and ripe tannins – an overall impressive vintage!

*Leisha Munro, President
Padthaway Grape Growers Association*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Padthaway was 43,802 tonnes, nearly three times the very low crush of 16,428 tonnes in 2020, and the largest crush reported since 2016.

Over the past five years (up to 2020), the average crush for Padthaway has been 32,188 tonnes, making this year's crush 36 per cent above the five-year average.

There were 19 respondents to the survey who reported crushing grapes from Padthaway in 2021, compared with 21 in 2020.

The total estimated value of winegrapes from Padthaway in 2021 was just under \$43.5 million, compared with \$17.7 million in 2020. The increase in production was partly offset by a decrease in the overall average value of grapes, which decreased from \$1063 in 2020 to \$984 in 2021.

There were decreases in average prices for all major varieties except Pinot Noir (up 17 per cent to \$1307 per tonne), and Chardonnay (up 1 per cent to \$701 per tonne). Shiraz decreased by 19 per cent to \$1162 per tonne and Cabernet Sauvignon these are weighbridge prices and do not include end-use bonuses. It has previously been found that Padthaway and Wrattenbully have larger adjustments made to their prices post-weighbridge than any other GI regions in South Australia, adding up to 30 per cent to the final value.

According to Vinehealth Australia data, the total vineyard area in Padthaway as at 30 April 2021 is 4131 hectares, compared with 3959 hectares in 2020 and 4019 hectares in 2016.

Padthaway had more new area planted in 2020–21 (190 hectares) than any other GI region in South Australia. Two-thirds of the new plantings were Shiraz (121 hectares) and one-third Cabernet Sauvignon (69 hectares).

Padthaway

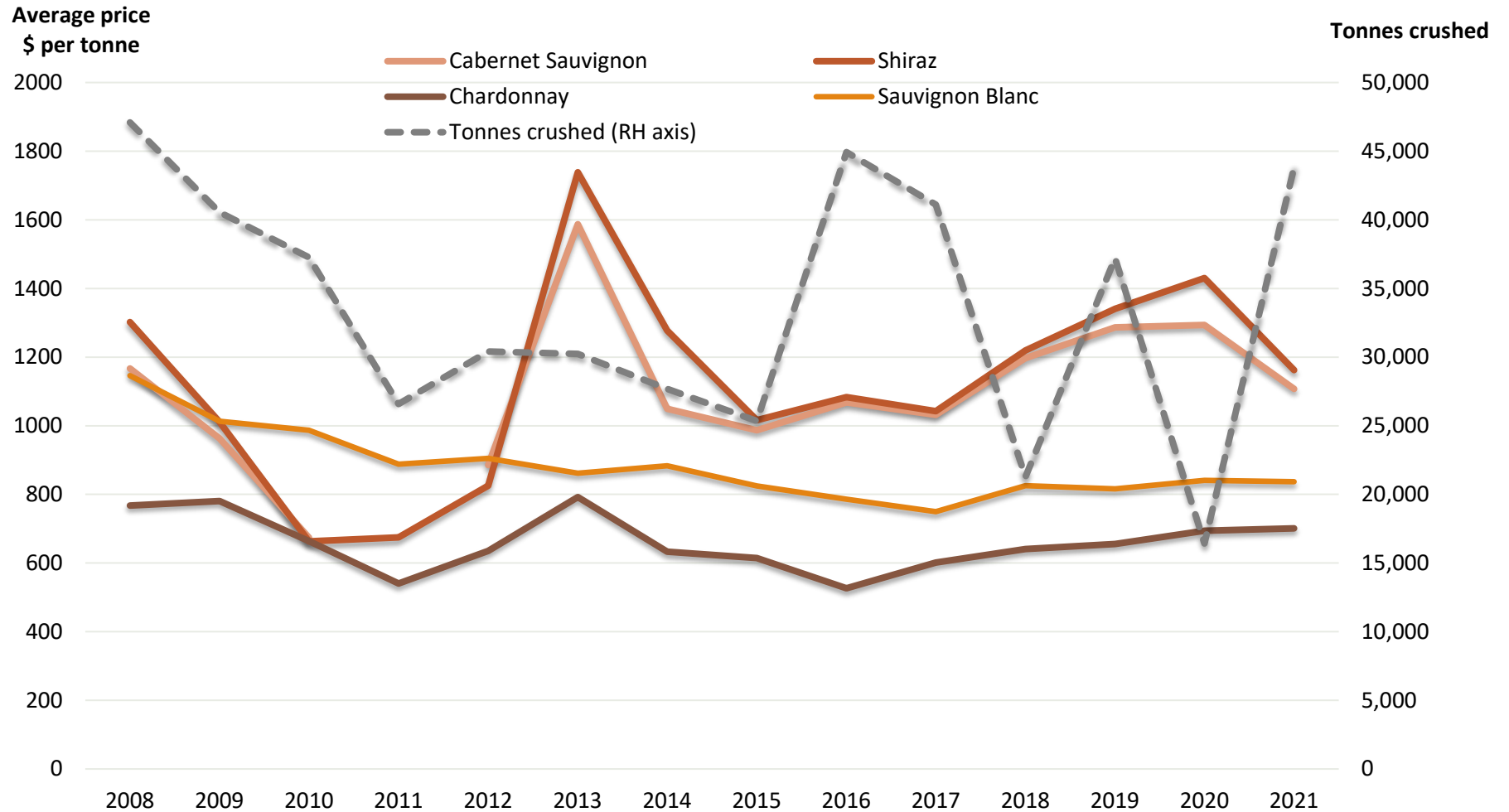
Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Cabernet Franc | | | | | 80 | 100% | 80 | \$124,017 |
| Cabernet Sauvignon | 5,079 | \$5,623,000 | \$1,107 | -14% | 3,997 | 44% | 9,076 | \$10,048,551 |
| Graciano | 9 | | | | 2 | 21% | 11 | \$16,680 |
| Malbec | 151 | \$179,407 | \$1,186 | 0% | 895 | 86% | 1,046 | \$1,240,842 |
| Merlot | 647 | \$555,704 | \$858 | -4% | 1,534 | 70% | 2,181 | \$1,872,447 |
| Pinot Noir | 1,227 | \$1,603,711 | \$1,307 | 17% | 110 | 8% | 1,337 | \$1,746,889 |
| Sangiovese | 68 | | | | | | 68 | \$96,920 |
| Shiraz | 7,187 | \$8,353,463 | \$1,162 | -19% | 6,042 | 46% | 13,229 | \$15,375,495 |
| Tempranillo | 15 | | | | 2 | 10% | 17 | \$41,550 |
| Red Total | 14,384 | \$16,462,605 | \$1,145 | -13% | 12,661 | 47% | 27,045 | \$30,563,393 |
| White | | | | | | | | |
| Chardonnay | 7,263 | \$5,090,865 | \$701 | 1% | 3,392 | 32% | 10,655 | \$7,468,143 |
| Gewürztraminer | 187 | | | | 161 | 46% | 348 | \$226,202 |
| Pinot Gris/Grigio | 2,061 | \$2,065,465 | \$1,002 | -0% | 6 | 0% | 2,067 | \$2,071,318 |
| Riesling | 207 | | | | 1,688 | 89% | 1,896 | \$1,611,447 |
| Sauvignon Blanc | 1,151 | \$962,805 | \$837 | -0% | 192 | 14% | 1,343 | \$1,123,630 |
| Verdelho | 39 | | | | 116 | 75% | 155 | \$61,968 |
| Vermentino | | | | | 127 | 100% | 127 | \$169,285 |
| Viognier | 83 | | | | 76 | 48% | 159 | \$158,840 |
| Other white | | | | | 7 | 100% | 7 | \$11,059 |
| White Total | 10,991 | \$8,515,769 | \$775 | -4% | 5,765 | 34% | 16,757 | \$12,901,891 |
| Grand Total | 25,375 | \$24,978,374 | \$984 | -7% | 18,427 | 42% | 43,802 | \$43,465,284 |

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

Padthaway

Historical weighted average price vs tonnes crushed



Padthaway

Price dispersion – purchased grapes

| | Tonnes purchased in each price segment | | | | | Total tonnes purchased |
|--------------------|--|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | | |
| Cabernet Sauvignon | | 14 | 4,638 | 426 | | 5,079 |
| Graciano | | | | 9 | | 9 |
| Malbec | | | 151 | | | 151 |
| Merlot | | 228 | 420 | | | 647 |
| Pinot Noir | | | 722 | 505 | | 1,227 |
| Sangiovese | | | 29 | 39 | | 68 |
| Shiraz | 124 | 668 | 5,749 | 444 | 203 | 7,187 |
| Tempranillo | | | | | 15 | 15 |
| Red Total | 124 | 910 | 11,709 | 1,423 | 217 | 14,384 |
| White | | | | | | |
| Chardonnay | 977 | 5,603 | 683 | | | 7,263 |
| Gewürztraminer | | 187 | | | | 187 |
| Pinot Gris/Grigio | | 191 | 1,870 | | | 2,061 |
| Riesling | | 207 | | | | 207 |
| Sauvignon Blanc | | 524 | 627 | | | 1,151 |
| Verdelho | 39 | | | | | 39 |
| Viognier | | | 83 | | | 83 |
| White Total | 1,016 | 6,712 | 3,263 | | | 10,991 |
| Total purchased | 1,140 | 7,622 | 14,973 | 1,423 | 217 | 25,375 |

Padthaway

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|--------------|-----------|------------|------------|--------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Franc | 8 | 0 | 0 | 0 | 8 | 0% |
| Cabernet Sauvignon | 984 | 67 | 85 | 69 | 1,205 | 6% |
| Malbec | 78 | 0 | 0 | 0 | 78 | 0% |
| Merlot | 167 | 0 | 0 | 0 | 167 | 0% |
| Pinot Noir | 86 | 0 | 11 | 0 | 97 | 0% |
| Shiraz | 1,177 | 26 | 22 | 121 | 1,346 | 9% |
| Other Red | 10 | 0 | 0 | 0 | 10 | 5% |
| Total red varieties | 2,510 | 93 | 118 | 190 | 2,911 | 7% |
| White winegrapes | | | | | | |
| Chardonnay | 747 | 0 | 0 | 0 | 747 | 0% |
| Pinot Gris | 138 | 0 | 0 | 0 | 138 | 0% |
| Riesling | 148 | 0 | 0 | 0 | 148 | 0% |
| Sauvignon Blanc | 83 | 0 | 0 | 0 | 83 | 0% |
| Verdelho | 19 | 0 | 0 | 0 | 19 | 0% |
| Viognier | 19 | 0 | 0 | 0 | 19 | 0% |
| Other White | 27 | 0 | 0 | 0 | 27 | 0% |
| Total white varieties | 1,181 | 0 | 0 | 0 | 1,181 | 0% |
| Unknown | 39 | 0 | 0 | 0 | 39 | 0% |
| Total all varieties | 3,730 | 93 | 118 | 190 | 4,131 | 5% |

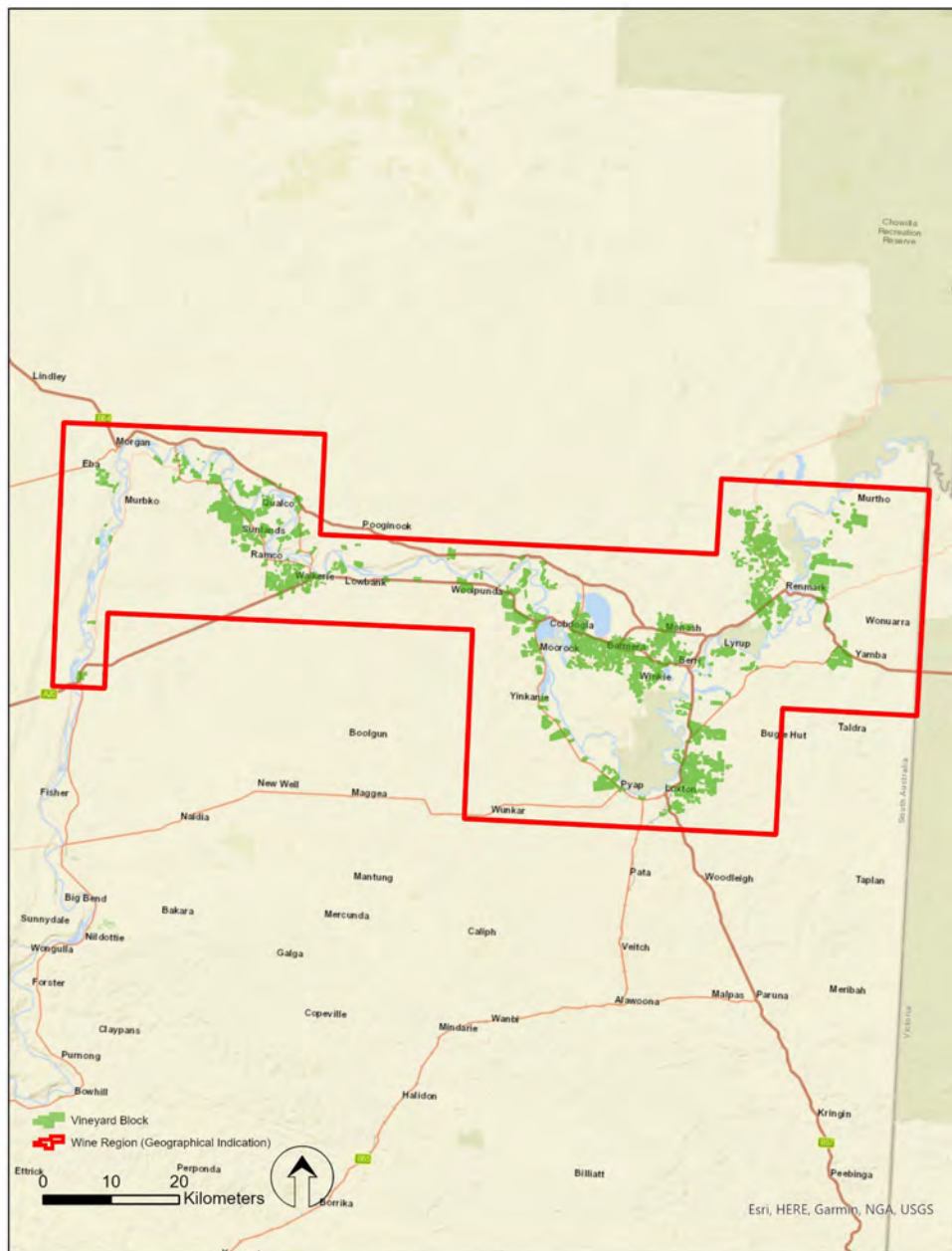
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Riverland Wine Region

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 1st June 2021
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Riverland Wine Region



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Riverland

Vintage overview

VINTAGE REPORT

The 2020 growing season was almost perfect in the Riverland region, with some describing it as a 'unicorn' vintage, a once in a lifetime event of near textbook conditions.

Rainfall returned to long-term average levels, with approximately 233mm across the growing season from January to October, producing favourable growing conditions. Budburst was uniform and moderate weather allowed for good fruitset, showing a potential for average to above average yields. There was some frost during May to September; however, weather during veraison was relatively dry so disease pressure was very low to non-existent.

A comparatively mild Riverland summer was brushed with only two minor rain events at 5mm each; this coupled with very few hot days and no drawn-out heatwaves, as experienced in previous years, led to a very positive harvest.

The harvest was underway by mid-January with early white and sparkling varieties making their way through the crushers. There was a period during harvest, due to the mild conditions, that Baumes did not move as expected, and in some cases, went backwards for some fruit. The cooler than usual conditions also facilitated a smooth intake of grapes with most varieties brought in at optimal sugar levels.

This contributed to an efficient vintage, with yield across the region reported as average to high, some experiencing their best crop yield in many years.

These 'unicorn' conditions with good rainfall and relatively cool weather leading up to and through the vintage have resulted in excellent wine quality, with wines showing good varietal character and the red varieties showing high colour density.

*Jo Pippas, General Manager
Riverland Wine*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from the Riverland was 558,252 tonnes in 2021, up 21 per cent compared with the 2020 crush of 461,385 tonnes. The crush was the largest ever recorded, and more than 70,000 tonnes above the previous highest recorded crush of 482,214 tonnes in 2005.

Over the past five years (up to 2020), the average crush for the Riverland has been 461,900 tonnes.

There were 62 respondents to the survey who reported crushing grapes from the Riverland in 2021, compared with 66 in 2020.

The total estimated value of winegrapes from the Riverland in 2021 was just under \$273 million compared with \$255 million in 2020, an increase of 7 per cent. The increase in production was partly offset by an overall decrease in the average purchase value of grapes, which decreased by 11 per cent from \$546 per tonne in 2020 to \$486 per tonne.

There were decreases in average prices for all the major reds except Pinot Noir, which was up 10 per cent to \$688 per tonne. Shiraz was down 21 per cent to \$552 per tonne, Cabernet Sauvignon down 23 per cent to \$539 per tonne and Merlot down 20 per cent to \$528 per tonne. Conversely, all the major whites increased in average value; Chardonnay up 8 per cent to \$435 per tonne, Sauvignon Blanc up 6 per cent to \$490 per tonne and Pinot Gris/Grigio up 3 per cent to \$542 per tonne.

The price dispersion data for reds shows a substantial downward shift, with only 10 per cent purchased at \$600+, compared with 94 per cent in 2020.

According to Vinehealth Australia data, the total vineyard area in the Riverland as at 30 April 2021 was 20,492 hectares, compared with 20,575 hectares in 2020 and 20,608 in 2016. There were 77 hectares of new plantings (including top-working and replacements) in the 2020-21 planting season, compared with 231 hectares the previous year.

Riverland

Winegrape intake summary table – reds

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|-------------------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Barbera | 43 | \$27,246 | \$634 | 0% | | | 43 | \$27,246 |
| Cabernet Franc | 7 | | | | | | 7 | \$3,250 |
| Cabernet Sauvignon | 66,343 | \$35,729,362 | \$539 | -23% | 19,244 | 22% | 85,587 | \$46,093,008 |
| Durif | 735 | \$431,095 | \$587 | -22% | 670 | 48% | 1,405 | \$823,951 |
| Graciano | 8 | | | | 0 | 3% | 8 | \$3,850 |
| Grenache | 4,743 | \$3,040,165 | \$641 | -0% | 692 | 13% | 5,434 | \$3,483,442 |
| Lagrein | 31 | \$19,818 | \$630 | -49% | | | 31 | \$19,818 |
| Malbec | 166 | | | | 273 | 62% | 440 | \$239,528 |
| Mataro/Mourvedre | 2,918 | \$1,532,328 | \$525 | -22% | 528 | 15% | 3,446 | \$1,809,428 |
| Merlot | 21,054 | \$11,113,377 | \$528 | -20% | 9,424 | 31% | 30,479 | \$16,087,822 |
| Montepulciano | 153 | \$106,781 | \$696 | -10% | 52 | 25% | 205 | \$142,852 |
| Muscat à petits grains rouges | 210 | \$112,909 | \$537 | 0% | 2 | 1% | 212 | \$113,715 |
| Nebbiolo | 5 | | | | | | 5 | \$2,250 |
| Nero d'Avola | 6 | | | | | | 6 | \$7,500 |
| Petit Verdot | 9,441 | \$4,654,993 | \$493 | -17% | 5,790 | 38% | 15,231 | \$7,509,823 |
| Pinot Noir | 8,195 | \$5,637,489 | \$688 | 10% | 944 | 10% | 9,140 | \$6,287,206 |
| Ruby Cabernet | 1,303 | \$658,018 | \$505 | -13% | 1,120 | 46% | 2,423 | \$1,223,713 |
| Sangiovese | 110 | \$54,885 | \$499 | 0% | 637 | 85% | 747 | \$372,925 |
| Shiraz | 121,676 | \$67,160,684 | \$552 | -21% | 33,795 | 22% | 155,470 | \$85,814,401 |
| Tempranillo | 643 | \$390,888 | \$608 | -7% | 410 | 39% | 1,052 | \$639,993 |
| Touriga Nacional | 44 | | | | 126 | 74% | 170 | \$85,230 |
| Other red | 1,613 | \$851,852 | \$527 | -19% | 6,643 | 80% | 8,257 | \$4,594,690 |
| Red Total | 239,447 | \$131,651,348 | \$550 | -20% | 80,349 | 25% | 319,796 | \$175,385,640 |

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

Riverland

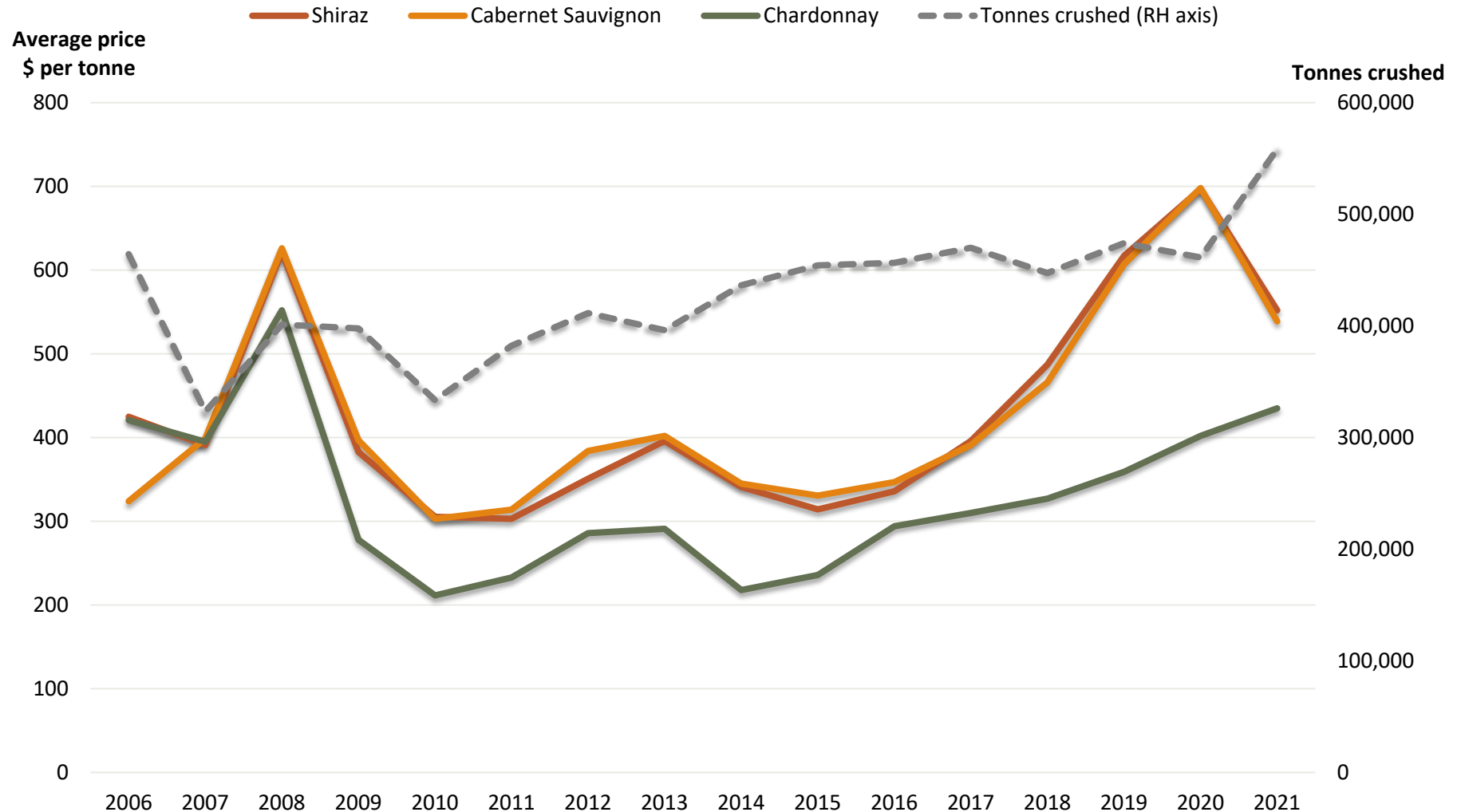
Winegrape intake summary table – whites

| Varieties | Tonnes purchased | Average | | | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|-------------------------------|------------------|-----------------------|--------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| | | Total value purchased | purchase value per tonne | % change in average value | | | | |
| White | | | | | | | | |
| Chardonnay | 105,138 | \$45,702,836 | \$435 | 8% | 22,867 | 18% | 128,005 | \$55,642,979 |
| Chenin blanc | 1,679 | \$568,860 | \$339 | 9% | | | 1,679 | \$568,860 |
| Colombard | 24,244 | \$7,640,590 | \$315 | 4% | 3,095 | 11% | 27,339 | \$8,615,995 |
| Fiano | 162 | \$99,703 | \$617 | 6% | | | 162 | \$99,703 |
| Gewürztraminer | 952 | \$371,519 | \$390 | 3% | 617 | 39% | 1,569 | \$612,528 |
| Grüner Veltliner | 3 | | | | 105 | 97% | 108 | \$33,634 |
| Marsanne | 4 | | | | | | 4 | \$3,200 |
| Muscat à petits grains blancs | 3,337 | \$1,113,897 | \$334 | -1% | 550 | 14% | 3,887 | \$1,297,667 |
| Muscat Gordo Blanco | 24,528 | \$7,618,083 | \$311 | -1% | 4,336 | 15% | 28,864 | \$8,964,833 |
| Pinot Gris/Grigio | 6,890 | \$3,731,813 | \$542 | 3% | 2,199 | 24% | 9,088 | \$4,922,525 |
| Prosecco | 186 | | | | | | 186 | \$162,516 |
| Riesling | 1,400 | \$478,880 | \$342 | 3% | 442 | 24% | 1,842 | \$630,213 |
| Roussanne | 4 | | | | | | 4 | \$1,348 |
| Sauvignon Blanc | 16,944 | \$8,297,836 | \$490 | 6% | 3,935 | 19% | 20,879 | \$10,225,036 |
| Semillon | 5,191 | \$1,821,567 | \$351 | 5% | 4,435 | 46% | 9,626 | \$3,377,685 |
| Verdelho | 1,012 | \$329,085 | \$325 | 3% | 636 | 39% | 1,648 | \$535,802 |
| Vermentino | 443 | \$255,699 | \$578 | 4% | 172 | 28% | 614 | \$355,011 |
| Viognier | 1,678 | \$748,846 | \$446 | 2% | 320 | 16% | 1,998 | \$891,747 |
| Other white | 760 | \$291,566 | \$384 | 4% | 192 | 20% | 952 | \$460,655 |
| White Total | 194,554 | \$79,238,778 | \$407 | 6% | 43,901 | 18% | 238,456 | \$97,401,935 |
| Grand Total | 434,002 | \$210,890,126 | \$486 | -11% | 124,250 | 22% | 558,252 | \$272,787,575 |

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

Riverland

Historical weighted average price vs tonnes crushed



Riverland

Price dispersion – purchased grapes (reds)

| Varieties | Tonnes purchased in each price segment | | | | Total tonnes purchased |
|-------------------------------|--|---------------|---------------|----------------|------------------------|
| | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | |
| Red | | | | | |
| Barbera | 32 | | 11 | | 43 |
| Cabernet Franc | 7 | | | | 7 |
| Cabernet Sauvignon | 64,203 | 1,930 | 210 | | 66,343 |
| Durif | 291 | 421 | 23 | | 735 |
| Graciano | 8 | | | | 8 |
| Grenache | 208 | 4,327 | 203 | 5 | 4,743 |
| Lagrein | 21 | | 11 | | 31 |
| Malbec | 166 | | | | 166 |
| Mataro/Mourvedre | 2,330 | 535 | 52 | | 2,918 |
| Merlot | 20,787 | 267 | | | 21,054 |
| Montepulciano | 83 | 18 | 53 | | 153 |
| Muscat à petits grains rouges | 210 | | | | 210 |
| Nebbiolo | 5 | | | | 5 |
| Nero d'Avola | | | 6 | | 6 |
| Petit Verdot | 9,128 | 255 | 59 | | 9,441 |
| Pinot Noir | | 7,710 | 485 | | 8,195 |
| Ruby Cabernet | 1,241 | 62 | | | 1,303 |
| Sangiovese | 110 | | | | 110 |
| Shiraz | 113,931 | 6,921 | 824 | | 121,676 |
| Tempranillo | 493 | | 150 | | 643 |
| Touriga Nacional | 44 | | | | 44 |
| Other red | 1,356 | 239 | 14 | 2 | 1,611 |
| Red Total | 214,652 | 22,686 | 2,101 | 7 | 239,445 |

Riverland

Price dispersion – purchased grapes (whites)

| Varieties | Tonnes purchased in each price segment | | | | Total tonnes purchased |
|-------------------------------|--|---------------|---------------|----------------|------------------------|
| | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | |
| White | | | | | |
| Chardonnay | 104,211 | 868 | 59 | | 105,138 |
| Chenin blanc | 1,679 | | | | 1,679 |
| Colombard | 24,244 | | | | 24,244 |
| Fiano | 152 | | 5 | 5 | 162 |
| Gewürztraminer | 952 | | | | 952 |
| Grüner Veltliner | 3 | | | | 3 |
| Marsanne | | 4 | | | 4 |
| Muscat à petits grains blancs | 3,337 | | | | 3,337 |
| Muscat Gordo Blanco | 24,528 | | | | 24,528 |
| Pinot Gris/Grigio | 6,347 | 528 | 15 | | 6,890 |
| Prosecco | | 134 | 52 | | 186 |
| Riesling | 1,400 | | | | 1,400 |
| Roussanne | 4 | | | | 4 |
| Sauvignon Blanc | 15,947 | 997 | | | 16,944 |
| Semillon | 5,065 | 126 | | | 5,191 |
| Verdelho | 1,012 | | | | 1,012 |
| Vermentino | 181 | 253 | 9 | | 443 |
| Viognier | 1,465 | 71 | 142 | | 1,678 |
| Other white | 729 | | 28 | 3 | 760 |
| White Total | 191,255 | 2,982 | 309 | 8 | 194,554 |
| Total purchased | 405,907 | 25,668 | 2,410 | 15 | 433,999 |

Riverland

Current plantings by variety and year planted – reds

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area in 2020 | % planted |
|-----------------------------|---------------|------------|------------|-----------|--------------------|--------------|
| Red winegrapes | | | | | | |
| Barbera | 2 | 0 | 0 | 0 | 2 | 0% |
| Cabernet Franc | 1 | 0 | 0 | 0 | 1 | 0% |
| Cabernet Sauvignon | 3,263 | 79 | 15 | 14 | 3,371 | 0% |
| Durif (Petite Sirah) | 31 | 4 | 0 | 0 | 35 | 0% |
| Grenache | 288 | 0 | 1 | 0 | 289 | 0% |
| Malbec | 26 | 1 | 0 | 0 | 27 | 0% |
| Mataro (Mourvedre) | 226 | 2 | 0 | 0 | 228 | 0% |
| Merlot | 1,166 | 25 | 12 | 1 | 1,204 | 0% |
| Montepulciano | 5 | 1 | 0 | 0 | 6 | 0% |
| Muscat A Petit Grains Rouge | 2 | 0 | 0 | 0 | 2 | 0% |
| Pedro Ximenez | 4 | 0 | 0 | 0 | 4 | 0% |
| Petit Verdot | 495 | 0 | 0 | 0 | 495 | 0% |
| Pinot Noir | 287 | 3 | 1 | 2 | 293 | 1% |
| Ruby Cabernet | 119 | 0 | 0 | 1 | 120 | 1% |
| Sangiovese | 17 | 0 | 4 | 0 | 21 | 0% |
| Saperavi | 3 | 0 | 0 | 0 | 3 | 0% |
| Shiraz | 5,522 | 57 | 123 | 53 | 5,755 | 1% |
| Tempranillo | 53 | 1 | 0 | 0 | 54 | 0% |
| Touriga | 6 | 0 | 0 | 0 | 6 | 0% |
| Other Red | 89 | 3 | 5 | 2 | 99 | 2% |
| Total red varieties | 11,605 | 176 | 161 | 73 | 12,015 | 1% |

Source:
Vinehealth
Australia

Riverland

Current plantings by variety and year planted – whites and other

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area in 2020 | % planted |
|--|---------------|------------|------------|-----------|--------------------|-----------|
| White winegrapes | | | | | | |
| Chardonnay | 4,261 | 24 | 3 | 2 | 4,290 | 0% |
| Chenin Blanc | 74 | 0 | 0 | 0 | 74 | 0% |
| Colombard | 726 | 0 | 0 | 0 | 726 | 0% |
| Doradillo | 34 | 0 | 0 | 0 | 34 | 0% |
| Fiano | 9 | 0 | 0 | 0 | 9 | 0% |
| Muscadelle (Tokay) | 8 | 0 | 0 | 0 | 8 | 0% |
| Muscat A Petit Grains Blanc (White Frontignac) | 102 | 0 | 0 | 0 | 102 | 0% |
| Muscat Gordo Blanco | 849 | 0 | 0 | 0 | 849 | 0% |
| Palomino | 8 | 0 | 0 | 0 | 8 | 0% |
| Pinot Gris | 203 | 48 | 1 | 0 | 252 | 0% |
| Riesling | 92 | 0 | 0 | 0 | 92 | 0% |
| Sauvignon Blanc | 529 | 12 | 5 | 2 | 548 | 0% |
| Savagnin | 8 | 0 | 0 | 0 | 8 | 0% |
| Semillon | 302 | 0 | 0 | 0 | 302 | 0% |
| Sultana | 121 | 0 | 0 | 0 | 121 | 0% |
| Traminer (Gewurztraminer) | 92 | 0 | 0 | 0 | 92 | 0% |
| Trebbiano | 13 | 0 | 0 | 0 | 13 | 0% |
| Verdelho | 85 | 0 | 0 | 0 | 85 | 0% |
| Vermentino | 16 | 0 | 0 | 0 | 16 | 0% |
| Viognier | 103 | 0 | 0 | 0 | 103 | 0% |
| Other White | 40 | 0 | 0 | 0 | 40 | 0% |
| Total white varieties | 7,675 | 84 | 9 | 4 | 7,772 | 0% |
| Unknown variety | 367 | 86 | 61 | 0 | 514 | 0% |
| Rootstock Block | 25 | 2 | 0 | 0 | 27 | 0% |
| Table grapes - red | 27 | 0 | 0 | 0 | 27 | 0% |
| Table grapes - white | 34 | 16 | 0 | 0 | 49 | 0% |
| Multi-purpose red | 58 | 0 | 0 | 0 | 58 | 0% |
| Multi-purpose white | 24 | 5 | 0 | 0 | 29 | 0% |
| Total all varieties | 19,815 | 369 | 231 | 77 | 20,492 | 0% |

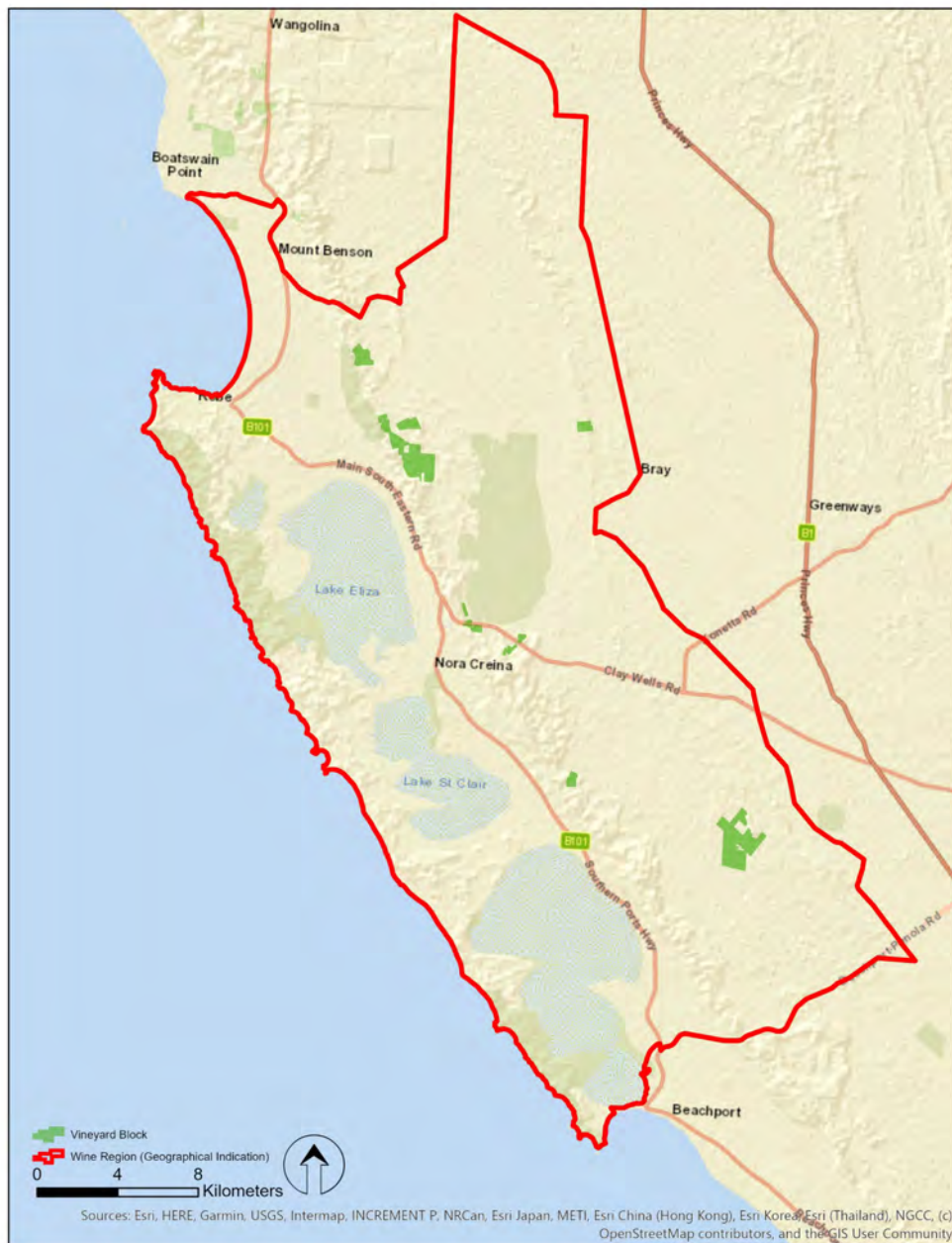
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Robe Wine Region

Wine Australia July 2021



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

Robe
Wine Region



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.

Robe

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 203 | \$242,549 | \$1,193 | 0% | 681 | 77% | 885 | \$1,054,917 |
| Merlot | 14 | | | | 18 | 56% | 33 | \$36,839 |
| Pinot Noir | | | | | 795 | 100% | 795 | \$1,558,196 |
| Shiraz | 296 | \$343,547 | \$1,159 | -12% | 834 | 74% | 1,130 | \$1,309,411 |
| Tempranillo | | | | | 20 | 100% | 20 | \$34,089 |
| Red Total | 514 | \$602,449 | \$1,171 | -7% | 2,348 | 82% | 2,862 | \$3,993,453 |
| White | | | | | | | | |
| Chardonnay | | | | | 1,088 | 100% | 1,088 | \$1,276,283 |
| Sauvignon Blanc | | | | | 108 | 100% | 108 | \$129,475 |
| Semillon | | | | | 206 | 100% | 206 | \$207,928 |
| White Total | | | | | 1,402 | 100% | 1,402 | \$1,613,686 |
| Grand Total | 514 | \$602,449 | \$1,171 | -7% | 3,750 | 88% | 4,264 | \$5,607,139 |

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

Robe

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|-----------|-----------|----------|------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 232 | 35 | 27 | 0 | 294 | 0% |
| Merlot | 37 | 0 | 0 | 0 | 37 | 0% |
| Pinot Noir | 61 | 0 | 0 | 0 | 61 | 0% |
| Shiraz | 170 | 0 | 0 | 0 | 170 | 0% |
| Other Red | 5 | 0 | 0 | 0 | 5 | 0% |
| Total red varieties | 505 | 35 | 27 | 0 | 567 | 0% |
| White winegrapes | | | | | | |
| Chardonnay | 107 | 0 | 0 | 0 | 107 | 0% |
| Pinot Gris | 15 | 0 | 0 | 0 | 15 | 0% |
| Sauvignon Blanc | 32 | 0 | 0 | 0 | 32 | 0% |
| Semillon | 12 | 0 | 0 | 0 | 12 | 0% |
| Other White | 0 | 0 | 0 | 0 | 0 | 0% |
| Total white varieties | 166 | 0 | 0 | 0 | 166 | 0% |
| Unknown | 0 | 0 | 0 | 0 | 0 | 0% |
| Total all varieties | 671 | 35 | 27 | 0 | 733 | 0% |

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Southern Fleurieu Wine Region

Wine Australia July 2021



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

**Southern Fleurieu
Wine Region**



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Southern Fleurieu

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | Change in price year on year | Winery grown fruit (tonnes) | Winery grown share of crush (%) | Total crushed (tonnes) | Estimated total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|------------------------------|-----------------------------|---------------------------------|------------------------|----------------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 290 | \$327,176 | \$1,129 | -33% | | | 290 | \$327,176 |
| Grenache | 21 | | | | | | 21 | \$12,714 |
| Merlot | 83 | | | | 2 | 2% | 84 | \$105,138 |
| Pinot Noir | 87 | | | | | | 87 | \$89,390 |
| Shiraz | 373 | \$450,760 | \$1,209 | -16% | | | 373 | \$450,760 |
| Tempranillo | 3 | | | | | | 3 | \$8,640 |
| Red Total | 857 | \$991,942 | \$1,158 | -25% | 2 | 0% | 858 | \$993,817 |
| White | | | | | | | | |
| Pinot Gris/Grigio | 65 | | | | 2 | 3% | 67 | \$72,823 |
| Sauvignon Blanc | 88 | | | | | | 88 | \$78,576 |
| White Total | 153 | \$149,227 | \$975 | -10% | 2 | 1% | 155 | \$151,399 |
| Grand Total | 1,010 | \$1,141,169 | \$1,130 | -15% | 4 | 0% | 1,013 | \$1,145,215 |

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

Southern Fleurieu

Price dispersion – purchased grapes

| Tonnes purchased by price segment | | | | |
|-----------------------------------|--------------|---------------|-----------|------------------------|
| Varieties | \$600-<\$900 | \$900-<\$1500 | >\$2000 | Total tonnes purchased |
| Red | | | | |
| Cabernet Sauvignon | 134 | 128 | 28 | 290 |
| Grenache | 21 | | | 21 |
| Merlot | | 83 | | 83 |
| Pinot Noir | | 87 | | 87 |
| Shiraz | 91 | 251 | 31 | 373 |
| Tempranillo | | | 3 | 3 |
| Red Total | 246 | 549 | 62 | 857 |
| White | | | | |
| Pinot Gris/Grigio | | 65 | | 65 |
| Sauvignon Blanc | 68 | 20 | | 88 |
| White Total | 68 | 86 | | 153 |
| Total purchased | 314 | 635 | 62 | 1,010 |

Southern Fleurieu

Current plantings by variety and year planted

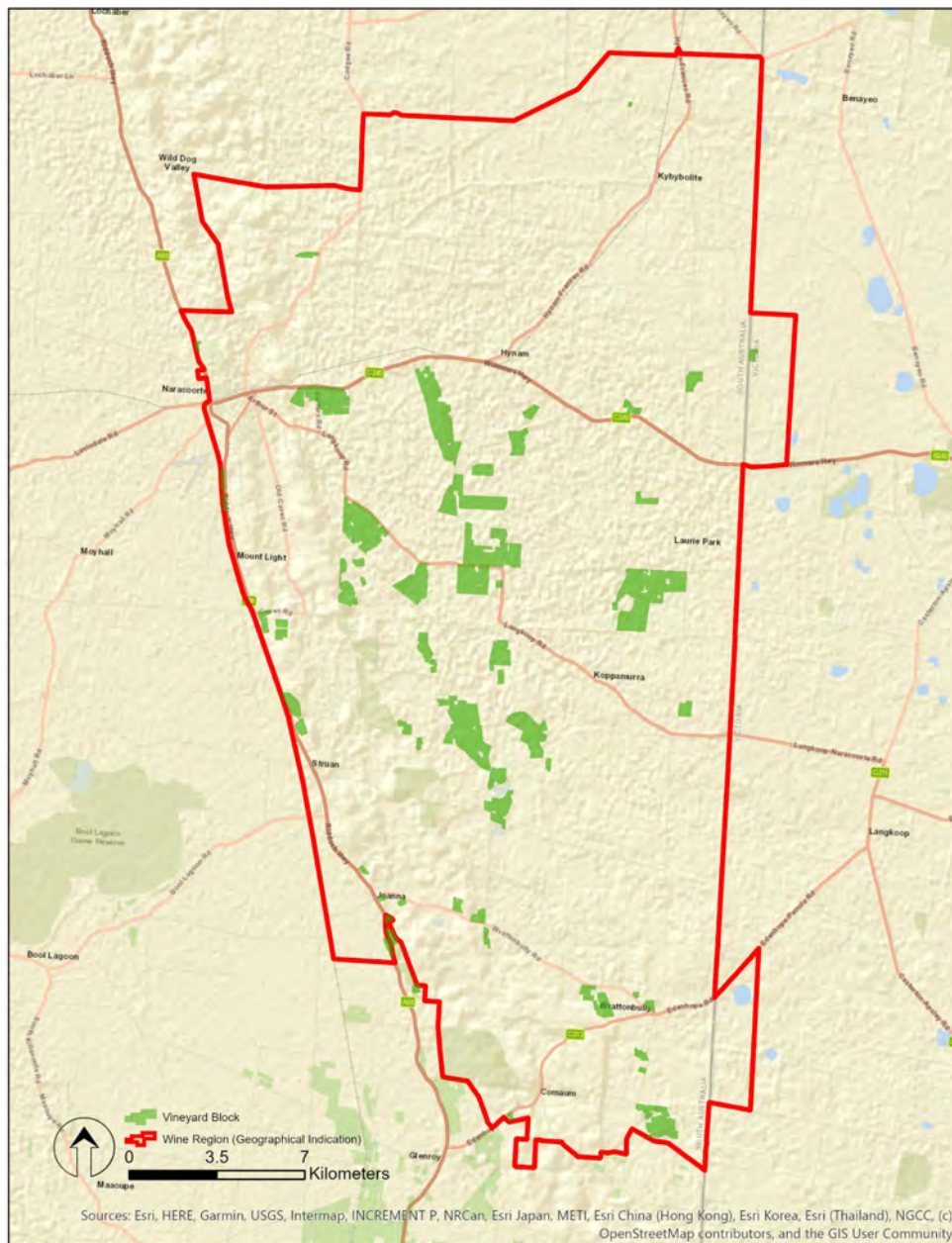
| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|-----------|----------|----------|------------|-------------------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 72 | 8 | 0 | 0 | 80 | 0% |
| Grenache | 1 | 0 | 0 | 0 | 1 | 0% |
| Malbec | 1 | 0 | 0 | 0 | 1 | 0% |
| Merlot | 35 | 0 | 0 | 0 | 35 | 0% |
| Pinot Noir | 25 | 0 | 0 | 0 | 25 | 0% |
| Shiraz | 118 | 6 | 6 | 0 | 130 | 0% |
| Tempranillo | 2 | 0 | 0 | 0 | 2 | 0% |
| Other Red | 2 | 0 | 0 | 0 | 2 | 0% |
| Total red varieties | 256 | 14 | 6 | 0 | 276 | 0% |
| White winegrapes | | | | | | |
| Chardonnay | 74 | 0 | 0 | 0 | 74 | 0% |
| Pinot Gris | 23 | 0 | 2 | 0 | 25 | 0% |
| Riesling | 3 | 0 | 0 | 0 | 3 | 0% |
| Sauvignon Blanc | 62 | 0 | 0 | 0 | 62 | 0% |
| Savagnin | 3 | 0 | 0 | 0 | 3 | 0% |
| Semillon | 13 | 0 | 0 | 0 | 13 | 0% |
| Viognier | 9 | 0 | 0 | 0 | 9 | 0% |
| Other White | 1 | 0 | 1 | 0 | 2 | 0% |
| Total white varieties | 188 | 0 | 3 | 0 | 191 | 0% |
| Unknown | 0 | 0 | 0 | 0 | 0 | 0% |
| Total all varieties | 444 | 14 | 9 | 0 | 467 | 0% |

Source:
Vinehealth
Australia

Regional Summary Report

Wrattonbully Wine Region

Wine Australia July 2021



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

Wrattonbully Wine Region



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Wrattonbully

Vintage overview

VINTAGE REPORT

The 2021 vintage will go down as one of the best vintages for a number of years - probably as far back as 2004. It was kind to both grape growers and winemakers with average to slightly above average yields and high quality across all varieties.

The season started well, with reasonable winter rainfall leading to near full soil moisture profiles. Moderate rainfall continued throughout early spring, allowing for excellent canopy growth and development of flowering parts of the vine. The mild and dry conditions throughout late spring allowed the vines to flower quickly and evenly (although later than usual), leading to an excellent set across all varieties.

The mild and dry conditions carried on throughout summer. There was a distinct lack of weather extremes with no wet cold spells or heat waves for the vines to contend with. These conditions continued on into February, March and April, which allowed for a slow and very even ripening of the fruit, with flavours, tannins and Baumés developing well across all varieties.

Harvesting of early white varieties commenced in late February, but most of the harvesting occurred in mid- to late-March, which is slightly later than the long-term average. With excellent canopy conditions combined with favourable weather at harvest, the whites are showing strong varietal characters and high crisp natural acidity.

The cooler ripening conditions pushed the harvest of red varieties out, with the bulk of the red harvest taking place in mid- to late-April. The dry and mild conditions allowed for the reds to be harvested at optimal ripeness, with more moderate Baumés than the past few seasons. It is one of those years that it is hard to pick out a standout variety as all varieties both reds and whites performed exceptionally well, with standout parcels for each one.

*Tim Fletcher, Chairperson
Wrattonbully Wine Region Association.*

OVERVIEW OF VINTAGE STATISTICS

After recording its lowest crush since 2007 last year, the crush from Wrattonbully in 2021 was 32,738 tonnes, the largest ever reported. Over the past five years (up to 2020), the average crush for Wrattonbully has been 20,231 tonnes, making this year's crush 62 per cent above the five-year average.

There were 22 respondents to the survey who reported crushing grapes from Wrattonbully in 2021, compared with 24 in 2020.

The total estimated value of winegrapes from Wrattonbully in 2021 was \$35 million, compared with \$17.1 million in 2020. The increase in production was partly offset by an overall decrease in the average purchase value of grapes, which decreased by 24 per cent from \$1379 per tonne in 2020 to \$1052 per tonne.

There were decreases in average prices for the three largest varieties: Cabernet Sauvignon down by 27 per cent to \$1128 per tonne, Shiraz down 29 per cent to \$1092 per tonne and Chardonnay down 19 per cent to \$810 per tonne. It should be noted that these are weighbridge prices and do not include end-use bonuses. It has previously been found that Padthaway and Wrattonbully have larger adjustments made to their prices post-weighbridge than any other GI regions in South Australia, adding up to 30 per cent to the final value.

The price dispersion data shows that there was a downward shift in prices, with 34 per cent of tonnages purchased at below \$900 per tonne, compared with 18 per cent in 2020.

According to Vinehealth Australia data, the total vineyard area in Wrattonbully as at 30 April 2021 is 2713 hectares, 19 hectares fewer than in 2020 and 40 hectares more than it was five years ago.

There were virtually no new plantings in the 2020–21 planting season.

Wrattonbully

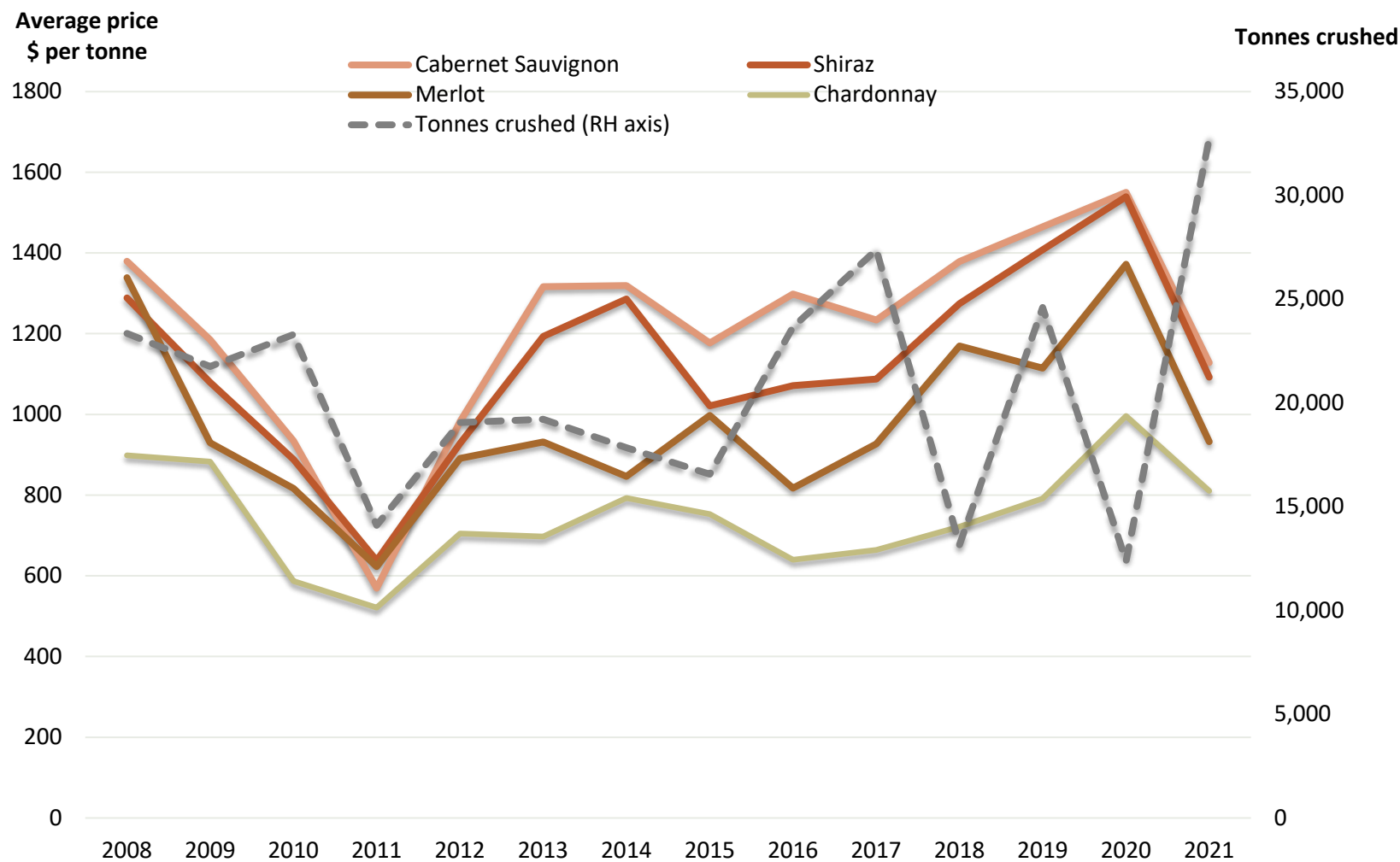
Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | % change in average value | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|---------------------------|-----------------------------|-----------------------------|------------------------|------------------------|
| Red | | | | | | | | |
| Barbera | 7 | | | | | | 7 | \$14,200 |
| Cabernet Sauvignon | 4,379 | \$4,938,583 | \$1,128 | -27% | 8,587 | 66% | 12,966 | \$14,623,988 |
| Malbec | 101 | \$113,625 | \$1,122 | -0% | 10 | 9% | 112 | \$125,110 |
| Merlot | 1,145 | \$1,067,899 | \$933 | -32% | 1,812 | 61% | 2,957 | \$2,757,737 |
| Petit Verdot | 7 | | | | 72 | 91% | 79 | \$86,977 |
| Pinot Noir | 266 | \$302,794 | \$1,136 | 2% | 682 | 72% | 948 | \$1,077,461 |
| Sangiovese | | | | | 67 | 100% | 67 | \$95,306 |
| Shiraz | 3,611 | \$3,944,549 | \$1,092 | -29% | 5,686 | 61% | 9,297 | \$10,156,475 |
| Tempranillo | 70 | | | | | | 70 | \$113,302 |
| Red Total | 9,586 | \$10,503,080 | \$1,096 | -28% | 16,916 | 64% | 26,503 | \$29,050,556 |
| White | | | | | | | | |
| Chardonnay | 1,337 | \$1,083,531 | \$810 | -19% | 1,341 | 50% | 2,678 | \$2,170,124 |
| Fiano | 20 | | | | | | 20 | \$40,560 |
| Pinot Gris/Grigio | 298 | \$346,102 | \$1,163 | -8% | 1,861 | 86% | 2,159 | \$2,510,747 |
| Prosecco | 169 | | | | | | 169 | \$118,118 |
| Riesling | | | | | 109 | 100% | 109 | \$161,591 |
| Sauvignon Blanc | 337 | \$267,712 | \$794 | 0% | 582 | 63% | 919 | \$729,843 |
| Semillon | | | | | 94 | 100% | 94 | \$94,572 |
| Viognier | | | | | 87 | 100% | 87 | \$121,288 |
| White Total | 2,161 | \$1,856,022 | \$859 | -19% | 4,074 | 65% | 6,235 | \$5,946,844 |
| Grand Total | 11,748 | \$12,359,102 | \$1,052 | -24% | 20,991 | 64% | 32,738 | \$34,997,400 |

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

Wrattonbully

Historical weighted average price vs tonnes crushed



Wrattenbully

Price dispersion – purchased grapes

| | Tonnes purchased in each price segment | | | | | Total tonnes purchased |
|--------------------|--|--------------|---------------|----------------|---------|------------------------|
| Varieties | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| Red | | | | | | |
| Barbera | | | | | 7 | 7 |
| Cabernet Sauvignon | 407 | 422 | 2,526 | 951 | 73 | 4,379 |
| Malbec | | | 89 | 13 | | 101 |
| Merlot | 173 | 370 | 602 | | | 1,145 |
| Petit Verdot | | | 7 | | | 7 |
| Pinot Noir | | 68 | 199 | | | 266 |
| Shiraz | 610 | 567 | 1,444 | 868 | 122 | 3,611 |
| Tempranillo | | | | 70 | | 70 |
| Red Total | 1,191 | 1,426 | 4,867 | 1,901 | 202 | 9,586 |
| White | | | | | | |
| Chardonnay | 113 | 847 | 367 | 10 | | 1,337 |
| Fiano | | | | | 20 | 20 |
| Pinot Gris/Grigio | | | 277 | 21 | | 298 |
| Prosecco | | 169 | | | | 169 |
| Sauvignon Blanc | | 232 | 105 | | | 337 |
| White Total | 113 | 1,248 | 749 | 31 | 20 | 2,161 |
| Total purchased | 1,304 | 2,674 | 5,615 | 1,932 | 222 | 11,748 |

Wrattonbully

Current plantings by variety and year planted

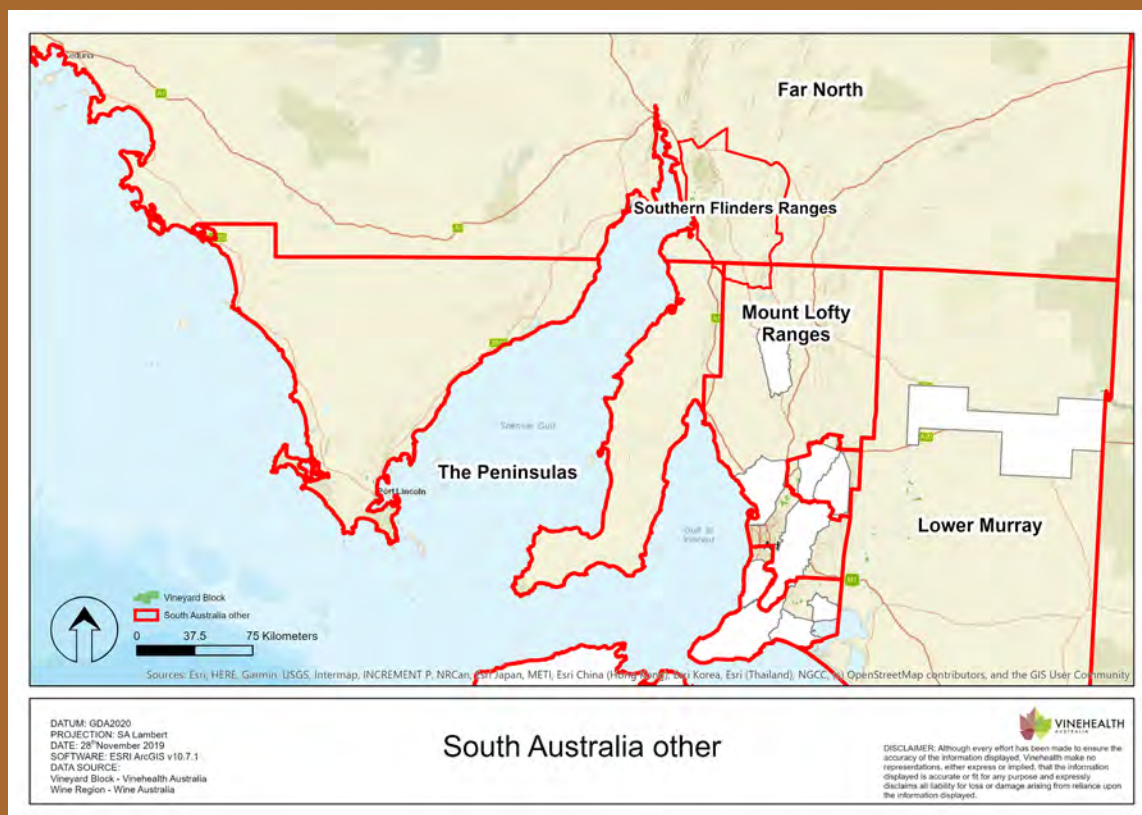
| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|--------------|-----------|------------|----------|--------------|-------------------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 1,223 | 0 | 71 | 0 | 1,294 | 0% |
| Grenache | 0 | 0 | 3 | 0 | 3 | 0% |
| Malbec | 6 | 0 | 5 | 0 | 11 | 0% |
| Merlot | 223 | 0 | 0 | 0 | 223 | 0% |
| Pinot Noir | 63 | 0 | 0 | 0 | 63 | 0% |
| Shiraz | 707 | 10 | 36 | 2 | 755 | 0% |
| Tempranillo | 9 | 0 | 0 | 0 | 9 | 0% |
| Other Red | 11 | 0 | 0 | 0 | 11 | 0% |
| Total red varieties | 2,242 | 10 | 114 | 2 | 2,369 | 0% |
| White winegrapes | | | | | | |
| Chardonnay | 156 | 0 | 0 | 0 | 156 | 0% |
| Pinot Gris | 99 | 0 | 0 | 0 | 99 | 0% |
| Riesling | 7 | 0 | 0 | 0 | 7 | 0% |
| Sauvignon Blanc | 59 | 0 | 0 | 0 | 59 | 0% |
| Semillon | 3 | 0 | 0 | 0 | 3 | 0% |
| Other White | 12 | 2 | 0 | 0 | 14 | 0% |
| Total white varieties | 336 | 2 | 0 | 0 | 338 | 0% |
| Unknown variety | 7 | 0 | 0 | 0 | 7 | 0% |
| Total all varieties | 2,585 | 12 | 114 | 2 | 2,713 | 0% |

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

GI Summary Report

SA – other



Wine Australia July 2021

Lower Murray zone – other

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | Change in price year on year | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Estimated total value all grapes |
|---------------------|------------------|-----------------------|----------------------------------|------------------------------|-----------------------------|-----------------------------|------------------------|----------------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 672 | \$386,225 | \$575 | -15% | 25 | 4% | 697 | \$400,731 |
| Merlot | 381 | \$206,170 | \$541 | -21% | | | 381 | \$206,170 |
| Shiraz | 1,083 | \$645,461 | \$596 | -11% | 20 | 2% | 1,103 | \$657,608 |
| Red Total | 2,136 | \$1,237,855 | \$580 | -14% | 46 | 2% | 2,181 | \$1,264,508 |
| White | | | | | | | | |
| Chardonnay | 1,232 | \$520,386 | \$422 | 5% | 10 | 1% | 1,242 | \$524,727 |
| Colombard | 68 | | | | 14 | 17% | 82 | \$30,507 |
| Muscat Gordo Blanco | 41 | | | | 24 | 37% | 65 | \$18,573 |
| Pinot Gris/Grigio | 112 | \$64,372 | \$573 | 0% | | | 112 | \$64,372 |
| Riesling | 24 | | | | | | 24 | \$9,920 |
| Sauvignon Blanc | 177 | \$93,938 | \$530 | 0% | 14 | 8% | 192 | \$101,586 |
| White Total | 1,655 | \$725,669 | \$439 | 5% | 63 | 4% | 1,717 | \$749,687 |
| Grand Total | 3,790 | \$1,963,524 | \$518 | -10% | 108 | 3% | 3,899 | \$2,014,195 |

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

Lower Murray zone – other

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|----------|-----------|----------|------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 75 | 2 | 0 | 0 | 77 | 0% |
| Grenache | 2 | 0 | 0 | 0 | 2 | 0% |
| Merlot | 18 | 0 | 0 | 0 | 18 | 0% |
| Petit Verdot | 16 | 0 | 0 | 0 | 16 | 0% |
| Pinot Noir | 1 | 0 | 0 | 0 | 1 | 0% |
| Shiraz | 134 | 0 | 12 | 0 | 146 | 0% |
| Other Red | 9 | 0 | 0 | 0 | 9 | 0% |
| Total red varieties | 255 | 2 | 12 | 0 | 269 | 0% |
| White winegrapes | | | | | | |
| Chardonnay | 74 | 0 | 0 | 0 | 74 | 0% |
| Colombard | 14 | 0 | 0 | 0 | 14 | 0% |
| Muscat Gordo Blanco | 3 | 0 | 0 | 0 | 3 | 0% |
| Pinot Gris | 4 | 0 | 0 | 0 | 4 | 0% |
| Riesling | 10 | 0 | 0 | 0 | 10 | 0% |
| Sauvignon Blanc | 13 | 0 | 0 | 0 | 13 | 0% |
| Other White | 2 | 0 | 0 | 0 | 2 | 0% |
| Total white varieties | 120 | 0 | 0 | 0 | 120 | 0% |
| Unknown variety | 16 | 0 | 0 | 0 | 16 | 0% |
| Total all varieties | 391 | 2 | 12 | 0 | 405 | 0% |

Source:
Vinehealth
Australia

Mount Lofty Ranges zone – other

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | Change in price year on year | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Estimated total value all grapes |
|-------------------------------|------------------|-----------------------|----------------------------------|------------------------------|-----------------------------|-----------------------------|------------------------|----------------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 157 | | | | 0 | 0% | 157 | \$192,732 |
| Grenache | | | | | 12 | 100% | 12 | \$25,424 |
| Mataro/Mourvedre | 12 | | | | | | 12 | \$22,212 |
| Merlot | | | | | 0 | 100% | 0 | \$272 |
| Montepulciano | 4 | | | | | | 4 | \$8,200 |
| Nebbiolo | 7 | | | | | | 7 | \$5,296 |
| Petit Verdot | 16 | | | | | | 16 | \$12,075 |
| Pinot Noir | | | | | 2 | 100% | 2 | \$3,922 |
| Sangiovese | 81 | \$95,086 | \$1,172 | 0% | 2 | 3% | 83 | \$97,781 |
| Shiraz | 536 | \$815,019 | \$1,519 | 5% | 30 | 5% | 566 | \$860,754 |
| Tempranillo | 9 | | | | | | 9 | \$13,725 |
| Red Total | 822 | \$1,163,977 | \$1,415 | 3% | 47 | 5% | 869 | \$1,242,394 |
| White | | | | | | | | |
| Chardonnay | | | | | 4 | 100% | 4 | \$4,691 |
| Grüner Veltliner | 2 | | | | | | 2 | \$4,840 |
| Muscat à petits grains blancs | | | | | 5 | 100% | 5 | \$5,246 |
| Muscat Gordo Blanco | | | | | 3 | 100% | 3 | \$2,930 |
| Sauvignon Blanc | | | | | 2 | 100% | 2 | \$2,507 |
| Other white | 2 | | | | 2 | 59% | 4 | \$6,151 |
| White Total | 4 | | | | 16 | 81% | 20 | \$26,365 |
| Grand Total | 826 | \$1,171,697 | \$1,417 | 3% | 63 | 7% | 889 | \$1,268,759 |

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

Mount Lofty Ranges zone – other

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|------------|----------|----------|-----------|------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 72 | 0 | 0 | 0 | 72 | 0% |
| Grenache | 4 | 0 | 0 | 0 | 4 | 0% |
| Mataro (Mourvedre) | 5 | 0 | 2 | 0 | 7 | 0% |
| Merlot | 6 | 0 | 0 | 0 | 6 | 0% |
| Petit Verdot | 6 | 0 | 0 | 0 | 6 | 0% |
| Sangiovese | 12 | 0 | 0 | 0 | 12 | 0% |
| Shiraz | 182 | 3 | 4 | 11 | 200 | 5% |
| Tempranillo | 5 | 0 | 0 | 0 | 5 | 0% |
| Other Red | 7 | 0 | 0 | 0 | 7 | 0% |
| Total red varieties | 299 | 3 | 6 | 11 | 319 | 3% |
| White winegrapes | | | | | | |
| Chardonnay | 4 | 0 | 0 | 0 | 4 | 0% |
| Riesling | 5 | 0 | 0 | 0 | 5 | 0% |
| Sauvignon Blanc | 5 | 0 | 0 | 0 | 5 | 0% |
| Semillon | 1 | 0 | 0 | 0 | 1 | 0% |
| Other White | 4 | 0 | 0 | 0 | 4 | 0% |
| Total white varieties | 19 | 0 | 0 | 0 | 19 | 0% |
| Unknown variety | 17 | 0 | 0 | 0 | 17 | 0% |
| Total all varieties | 335 | 3 | 6 | 11 | 355 | 3% |

Source:
Vinehealth
Australia

Southern Flinders Ranges

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | Change in price year on year | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Estimated total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|------------------------------|-----------------------------|-----------------------------|------------------------|----------------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 73 | | | | 1 | 1% | 74 | \$69,130 |
| Merlot | 48 | | | | 1 | 2% | 49 | \$34,132 |
| Nebbiolo | | | | | 1 | 100% | 1 | \$2,253 |
| Shiraz | 561 | \$642,037 | \$1,144 | -8% | 448 | 44% | 1,010 | \$1,155,160 |
| Red Total | 681 | \$743,659 | \$1,091 | -6% | 451 | 40% | 1,133 | \$1,260,675 |
| White | | | | | | | | |
| Riesling | | | | | 1 | 100% | 1 | \$1,481 |
| Semillon | | | | | 1 | 100% | 1 | \$1,011 |
| White Total | | | | | 2 | 100% | 2 | \$2,492 |
| Grand Total | 681 | \$743,659 | \$1,091 | -6% | 453 | 40% | 1,135 | \$1,263,167 |

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

Southern Flinders Ranges

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area in 2020 | % planted |
|------------------------------|------------|----------|----------|----------|--------------------|-----------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 12 | 0 | 0 | 0 | 12 | 0% |
| Merlot | 6 | 0 | 0 | 0 | 6 | 0% |
| Shiraz | 116 | 0 | 7 | 0 | 123 | 0% |
| Other Red | 0 | 0 | 0 | 0 | 0 | 0% |
| Total red varieties | 134 | 0 | 7 | 0 | 141 | 0% |
| White varieties | | | | | | |
| Other White | 0 | 0 | 0 | 0 | 0 | 0% |
| Total white varieties | 1 | 0 | 0 | 0 | 1 | 0% |
| Unknown | 26 | 0 | 0 | 0 | 26 | 0% |
| Total all varieties | 161 | 0 | 7 | 0 | 168 | 0% |

Source:
Vinehealth
Australia

The Peninsulas

Winegrape intake summary table

| Varieties | Tonnes purchased | Total value purchased | Average purchase value per tonne | Change in price year on year | Winery grown fruit (tonnes) | Winery grown share of crush | Total crushed (tonnes) | Estimated total value all grapes |
|--------------------|------------------|-----------------------|----------------------------------|------------------------------|-----------------------------|-----------------------------|------------------------|----------------------------------|
| Red | | | | | | | | |
| Cabernet Sauvignon | 60 | | | | 2 | 3% | 62 | \$124,616 |
| Merlot | | | | | 1 | 100% | 1 | \$835 |
| Shiraz | 120 | | | | 7 | 6% | 127 | \$241,051 |
| Red Total | 179 | | | | 10 | 5% | 190 | \$366,502 |
| White | | | | | | | | |
| Chardonnay | | | | | 3 | 100% | 3 | \$3,734 |
| Riesling | | | | | 2 | 100% | 2 | \$2,725 |
| Sauvignon Blanc | | | | | 10 | 100% | 10 | \$11,663 |
| Viognier | | | | | 1 | 100% | 1 | \$1,737 |
| White Total | | | | | 16 | 100% | 16 | \$19,859 |
| Grand Total | 179 | | | | 26 | 13% | 206 | \$386,361 |

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

The Peninsulas

Current plantings by variety and year planted

| Variety | Pre-2018 | 2018 | 2019 | 2020 | Total area | % planted in 2020 |
|------------------------------|-----------|----------|----------|----------|------------|-------------------------|
| Red winegrapes | | | | | | |
| Cabernet Sauvignon | 9 | 0 | 0 | 0 | 9 | 0% |
| Grenache | 1 | 0 | 0 | 0 | 1 | 0% |
| Merlot | 2 | 0 | 0 | 0 | 2 | 0% |
| Shiraz | 12 | 0 | 2 | 0 | 13 | 0% |
| Total red varieties | 24 | 0 | 2 | 0 | 25 | 0% |
| White winegrapes | | | | | | |
| Chardonnay | 2 | 0 | 0 | 0 | 2 | 0% |
| Riesling | 3 | 0 | 0 | 0 | 3 | 0% |
| Sauvignon Blanc | 2 | 0 | 0 | 0 | 2 | 0% |
| Semillon | 1 | 0 | 0 | 0 | 1 | 0% |
| Other White | 2 | 0 | 1 | 0 | 3 | 0% |
| Total white varieties | 10 | 0 | 1 | 0 | 11 | 0% |
| Unknown | 34 | 0 | 0 | 0 | 34 | 0% |
| Total all varieties | 67 | 0 | 3 | 0 | 70 | 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 89 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 receipt – 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 2021).

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.

- Planting data tables are current as at 30 April 2021 and include all plantings from the 2020–21 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.

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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 and the Wine Grape Council of SA.

The survey publication is available on 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.

Survey results from 2015 onwards are available on the Wine Australia interactive Vintage Survey Dashboard:

<https://marketexplorer.wineaustralia.com/vintage-survey>

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.

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.

Credits

Images – Wine Australia

GI maps – Vinehealth Australia

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.

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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