

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

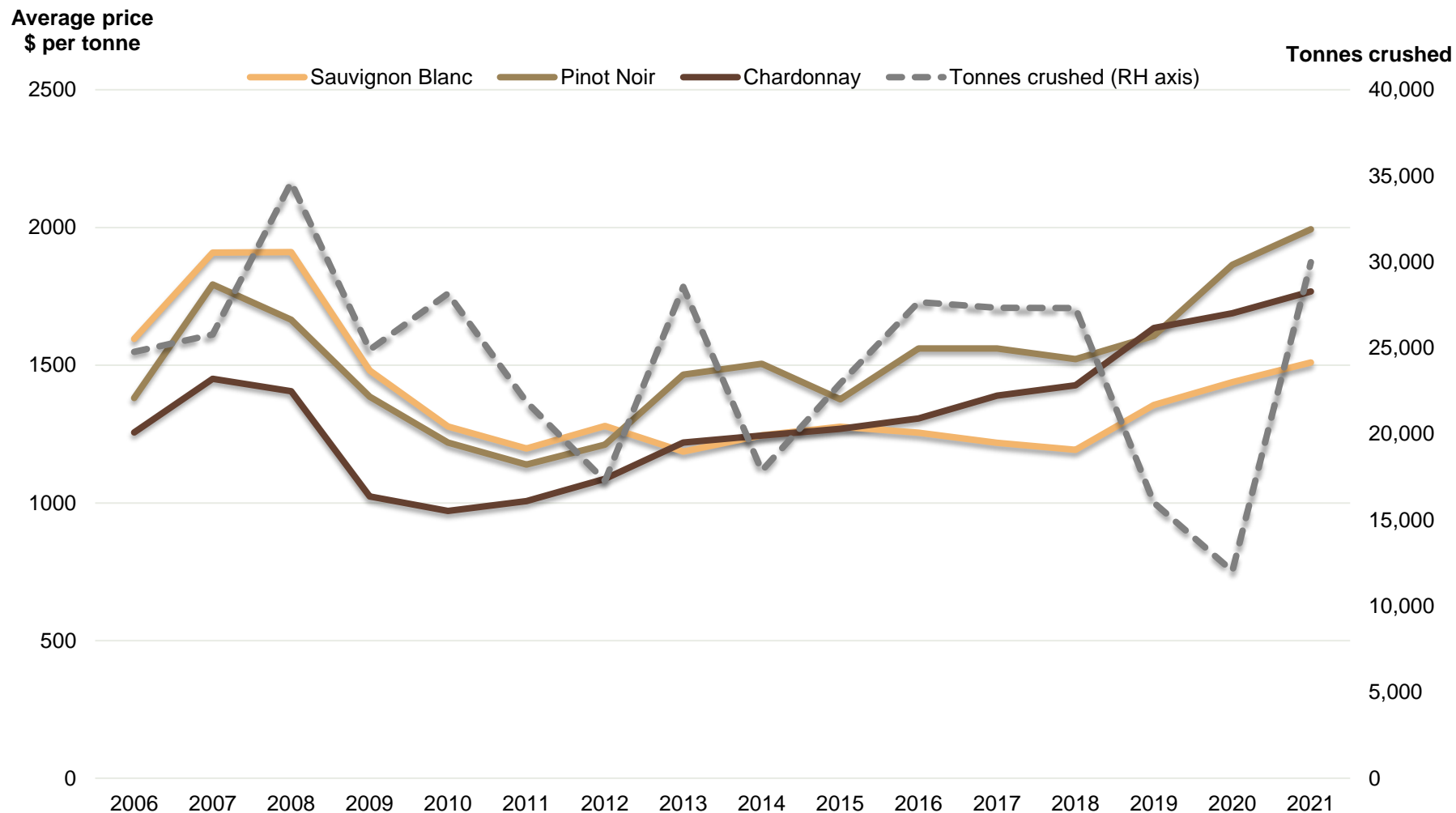
Winegrape intake summary table

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

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 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 top-worked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.



Acknowledgements

AUSTRALIAN NATIONAL VINTAGE SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association, Wine Grape Growers South Australia and Primary Industries and Regions SA.

The survey publication is available on 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

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

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