



# SA Winegrape Crush Survey 2019

## Regional Summary Report

## Adelaide Plains Wine Region

*Wine Australia July 2019*

DATUM: GDA94  
PROJECTION: MGA Zone 54  
DATE: 8<sup>th</sup> March 2017  
SOFTWARE: ESRI ArcGIS v10.4  
DATA SOURCE:  
Vineyard Block - Vinehealth Australia  
Wine Region - Wine Australia

## Adelaide Plains Wine Region



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# Adelaide Plains

## Vintage overview

### OVERVIEW OF VINTAGE STATISTICS

A total of 2,964 tonnes of Adelaide Plains winegrapes was crushed in 2019, up 2 per cent on the 2018 crush.

There were 10 survey respondents who reported crushing grapes from the Adelaide Plains in 2019, compared with 11 in 2018.

The five-year average crush from this region (2014-2018) is 3,651 tonnes, meaning that the 2019 yield overall was 19 per cent below the average but slightly above the minimum crush over the period which was 2,911 tonnes in 2018. The maximum crush of 4,396 tonnes was recorded in 2016.

The total value of winegrapes increased from \$2.6 million in 2018 to just below \$3 million as a result of the higher tonnage and an overall increase in the average grape price of 10 per cent. For most varieties the average price paid increased for the second year in a row. Shiraz increased by 12 per cent to \$1068 per tonne, Merlot by 11 per cent to 822 per tonne and Cabernet Sauvignon by 11 per cent to \$1054 per tonne.

The price dispersion data shows an upward shift in prices, with 81 per cent of the red tonnage purchased at between \$600 and \$1500 compared with 87 per cent last year, while 15 per cent was purchased at over \$1500 compared with 10 per cent in 2018. For the whites, 90 per cent was purchased at between \$600 and \$1500 per tonne.

There were no new plantings reported in the Adelaide Plains in the 2018 planting season. The total area planted as at 30 April 2019 is 486 hectares compared with 472 hectares reported in 2018, and is 26 per cent lower than it was in 2013 (657 hectares).

# Adelaide Plains

## Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
<b>Red</b>									0				
Cabernet Sauvignon	261			215	46		\$274,615	\$1,054	11%		0%	261	\$274,615
Grenache	97			97			\$72,292	\$744			0%	97	\$72,292
Mataro/Mourvedre	70			20	50						0%	70	\$105,792
Merlot	123			111	11		\$100,653	\$822	11%		0%	123	\$100,653
Montepulciano	1				1						0%	1	\$1,365
Pinot Noir	92		82	10							0%	92	\$47,130
Sangiovese	40			40							0%	40	\$26,007
Shiraz	1,450			1,229	221		\$1,548,736	\$1,068	12%		0%	1,450	\$1,548,736
Tempranillo	16			16							0%	16	\$18,960
Other red	1				1						0%	1	\$1,545
<b>Red Total</b>	<b>2,150</b>		<b>82</b>	<b>1,738</b>	<b>330</b>		<b>\$2,197,094</b>	<b>\$1,022</b>	<b>12%</b>		<b>0%</b>	<b>2,150</b>	<b>\$2,197,094</b>
<b>White</b>													\$0
Chardonnay	176		46	131							0%	176	\$131,056
Chenin blanc	33		33								0%	33	\$11,610
Pinot Gris/Grigio	265			265							0%	265	\$277,155
Sauvignon Blanc	320			320			\$313,144	\$978	11%		0%	320	\$313,144
Viognier	19			19							0%	19	\$26,964
<b>White Total</b>	<b>813</b>		<b>79</b>	<b>734</b>			<b>\$759,929</b>	<b>\$934</b>	<b>7%</b>		<b>0%</b>	<b>813</b>	<b>\$759,929</b>
<b>Grand Total</b>	<b>2,964</b>		<b>161</b>	<b>2,473</b>	<b>330</b>		<b>\$2,957,023</b>	<b>\$998</b>	<b>10%</b>		<b>0%</b>	<b>2,964</b>	<b>\$2,957,023</b>

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	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	53	0	0	0	53	0%
Grenache	20	0	0	0	20	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	31	0	0	0	31	0%
Pinot Noir	13	0	0	0	13	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	220	0	0	0	220	0%
Other Red	15	0	0	0	15	0%
TOTAL RED WINEGRAPES	367	0	0	0	367	0%
White winegrapes						
Chardonnay	27	0	0	0	27	0%
Pinot Gris/Grigio	30	3	0	0	33	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	26	0	0	0	26	0%
Other White	13	2	0	0	15	0%
TOTAL WHITE WINEGRAPES	103	5	0	0	108	0%
Unknown variety	11	0	0	0	11	0%
TOTAL ALL VARIETIES	481	5	0	0	486	0%

Source:  
Vinehealth  
Australia



# Explanations and definitions

## 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.

Maps and planting data tables are provided by Vinehealth Australia (see notes on planting data tables).

The survey publication is available on Wine Australia's website [wineaustralia.com](http://wineaustralia.com), the Vinehealth Australia website [vinehealth.com.au](http://vinehealth.com.au) and via links from the Wine Grape Council SA website [wgcsa.com.au](http://wgcsa.com.au) and the South Australian Wine Industry Association website [winesa.com.au](http://winesa.com.au)

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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.

Any questions about the report should be directed to:

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# Explanations and definitions - continued

## INTAKE (CURRENT VINTAGE) DATA

### *Definition of regions*

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from Wine Australia.

### *Total crush*

The total crushed is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 88 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

### *Calculated average purchase value*

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2019).

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.

### **Explanatory notes for planting data tables**

Regions are defined according to the Register of Australian Geographical Indications.

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 six, 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 2019 and include all plantings from the 2018-19 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.

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.