

Adelaide Plains

Vintage overview

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Adelaide Plains winegrapes was 2125 tonnes in 2020, down by 28 per cent on the 2019 reported crush of 2964 tonnes. Over the past five years (up to 2019), the average crush for the Adelaide Plains has been 3118 tonnes, making this year's crush 32 per cent below the five-year average.

There were 8 respondents to the survey who reported crushing grapes from the Adelaide Plains in 2020, compared with 9 in 2019.

The total estimated value of winegrapes in 2020 decreased from just under \$3 million in 2019 to \$2.3 million as a result of the lower production, although this was partly offset by an overall increase in the average purchase value of grapes, which increased by 8 per cent from \$998 to \$1081 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up by 6 per cent to \$1136 per tonne, Sauvignon Blanc up 2 per cent to \$999 per tonne and Cabernet Sauvignon up by 1 per cent to \$1063 per tonne.

The price dispersion data shows a very narrow band of prices paid, with 83 per cent of reds and 100 per cent of whites being sold at between \$600 and \$1500 per tonne.

There were no new plantings in the region in the 2019-20 season for the third year in a row.

The total vineyard area in the Adelaide Plains as at 30 April 2020 is 443 hectares compared with 486 hectares in 2019 and is 76 hectares (15 per cent) below the total area five years ago.

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Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red									0				
Cabernet Sauvignon	193			193			\$205,292	\$1,063	1%	4	2%	197	\$209,542
Grenache	67			67							0%	67	\$55,734
Mataro/Mourvedre	47			15	32						0%	47	\$70,088
Merlot	109			98	11		\$96,399	\$883	7%		0%	109	\$96,399
Montepulciano													\$0
Nebbiolo													\$0
Pinot Noir	37		37								0%	37	\$18,380
Sangiovese	19			19							0%	19	\$14,183
Shiraz	1,098			909	186	3	\$1,247,251	\$1,136	6%		0%	1,098	\$1,247,251
Tempranillo	9			9							0%	9	\$11,258
Red total	1,579		37	1,310	229	3	\$1,718,584	\$1,088	7%	4	0%	1,583	\$1,722,834
White													\$0
Chardonnay	125			125							0%	125	\$129,994
Chenin blanc													\$0
Pinot Gris/Grigio	187			187							0%	187	\$211,028
Sauvignon Blanc	224			224			\$223,550	\$999	2%		0%	224	\$223,550
Viognier	6			6							0%	6	\$8,708
White total	542			542			\$573,280	\$1,058	13%		0%	542	\$573,280
Grand total	2,121		37	1,852	229	3	\$2,291,864	\$1,081	8%	4	0%	2,125	\$2,296,114

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

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Current plantings by variety and year planted

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	49	0	0	0	49	0%
Grenache	20	0	0	0	20	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	22	0	0	0	22	0%
Pinot Noir	13	0	0	0	13	0%
Sangiovese	5	0	0	0	5	0%
Shiraz	205	0	0	0	205	0%
Other Red	14	0	0	0	14	0%
Total red varieties	337	0	0	0	337	0%
White winegrapes						
Chardonnay	26	0	0	0	26	0%
Colombard	1	0	0	0	1	0%
Pinot Gris	32	0	0	0	32	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	21	0	0	0	21	0%
Other White	8	0	0	0	8	0%
Total white varieties	92	0	0	0	92	0%
Unknown variety	14	0	0	0	14	0%
Total all varieties	443	0	0	0	443	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 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 specific amounts paid for freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2020).

The calculated average purchase value per tonne is the average amount paid per tonne of fruit across all wineries.

Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements.

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

Important note on average purchase value

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts.

Price dispersion data (shaded columns in Intake Summary tables)

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

Estimated total value of all grapes

The estimated total value of all grapes is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value for the same variety across similar regions, or across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

Explanations and definitions - continued

PLANTING DATA

Source of planting data tables

Planting data is not collected by the Australian National Vintage Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia.

Vinehealth Australia is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of vineyard owners in the state. Vineyard owners with plantings of 0.5 hectares or more are required to register with Vinehealth Australia, and provide details of any changes made to these vineyard plantings within three months of any such change. This information is kept strictly confidential and provided for this survey in a deidentified and aggregated manner.

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

Explanatory notes for planting data tables

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

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

- Planting data tables are current as at 30 April 2020 and include all plantings from the 2019–20 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.
- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.

Acknowledgements

AUSTRALIAN NATIONAL VINTAGE SURVEY

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

The survey publication is available on Wine Australia's website wineaustralia.com, the Vinehealth Australia website vinehealth.com.au and via links from the Wine Grape Council SA website wgcsa.com.au and the South Australian Wine Industry Association website www.winesa.asn.au.

Credits

Images – Wine Australia
GI maps – Vinehealth Australia

About Wine Australia

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

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

Disclaimer

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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