



SA Winegrape Crush Survey 2020

Regional Summary Report

Fleurieu other Inc Southern Fleurieu and Kangaroo Island

Wine Australia July 2020

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, Kangaroo Island
Wine Regions and Fleurieu other



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Fleurieu other

Vintage overview

Fleurieu other in this report includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are outside any GI regions in the Fleurieu zone. The total area of vines included in this definition is 870 hectares.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Fleurieu other was 2920 tonnes in 2020, down by 15 per cent compared with the 2019 reported crush of 3452 tonnes. Over the past five years (up to 2019), the average crush for Fleurieu other has been 3478 tonnes, making this year's crush 16 per cent below the five-year average.

There were 24 respondents to the survey who reported crushing grapes from Fleurieu other in 2020, compared with 27 in 2019.

The total estimated value of winegrapes from Fleurieu other in 2020 was \$3.2 million compared with \$3.3 million in 2019 – a 5 per cent decrease. The decrease in production was partly offset by an overall increase in the average purchase value of grapes, which increased by 11 per cent from \$976 in 2019 to \$1081 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up by 7 per cent to \$1249 per tonne, Sauvignon Blanc up 30 per cent to \$990 per tonne and Pinot Gris/Grigio up by 17 per cent to \$986 per tonne.

The price dispersion data shows a narrow range of purchase prices, with 92 per cent of red grapes and 88 per cent of white grapes purchased at between \$600 and \$1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in Fleurieu other as at 30 April 2020 is 870 hectares, with few new plantings for the past four years. The total area is around 80 hectares less than it was 5 years ago.

Fleurieu other

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													
Cabernet Franc	0										0%	0	\$385
Cabernet Sauvignon	198			171		27	\$276,042	\$1,393	9%	74	27%	272	\$379,094
Grenache													\$0
Malbec	2			2							0%	2	\$2,016
Merlot	62			52	10		\$77,033	\$1,242	27%	10	14%	72	\$89,204
Pinot Noir	98			81		17			-100%	4	3%	101	\$155,714
Shiraz	931			891	10	30	\$1,162,784	\$1,249	7%	57	6%	987	\$1,233,564
Tempranillo	18			2		16	\$36,672	\$2,033	-9%		0%	18	\$36,672
Red Total	1,309			1,199	19	90	\$1,705,153	\$1,303	7%	144	10%	1,453	\$1,896,648
White													
Chardonnay	268		17	251			\$193,777	\$724	15%	11	4%	278	\$201,377
Muscat Gordo Blanco	95		95								0%	95	\$38,128
Pinot Gris/Grigio	429			429			\$422,933	\$986	17%	15	3%	444	\$437,518
Prosecco	68			68							0%	68	\$51,120
Riesling	25		25							12	33%	37	\$18,680
Sauvignon Blanc	389			369	20		\$385,460	\$990	30%	70	15%	459	\$454,639
Semillon	70			70						9	11%	79	\$67,117
Other white										6	100%	6	\$10,535
White Total	1,345		137	1,187	20		\$1,163,747	\$865	23%	122	8%	1,467	\$1,279,113
Grand Total	2,653		137	2,386	40	90	\$2,868,846	\$1,081	11%	266	9%	2,920	\$3,175,761

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

Fleurieu other

Current plantings by variety and year planted – Southern Fleurieu

<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	70	0	8	0	78	0%
Merlot	35	0	0	0	35	0%
Pinot Noir	25	0	0	0	25	0%
Shiraz	117	8	6	6	137	4%
Other Red	4	0	0	0	4	0%
Total red varieties	251	8	14	6	279	2%
White winegrapes						
Chardonnay	77	0	0	0	77	0%
Pinot Gris	23	0	0	1	24	4%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	66	0	0	0	66	0%
Semillon	13	0	0	0	13	0%
Viognier	9	0	0	0	9	0%
Other White	8	0	0	1	9	11%
Total white varieties	199	0	0	2	201	1%
Unknown variety	3	0	0	0	3	0%
Total all varieties	453	8	14	8	483	2%

Source:
Vinehealth
Australia

Fleurieu other

Current plantings by variety and year planted – Kangaroo Island

<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 Franc	5	0	0	0	5	0%
Cabernet Sauvignon	41	2	0	0	43	0%
Merlot	4	0	0	0	4	0%
Shiraz	46	0	0	0	46	0%
Other Red	8	2	0	0	10	0%
Total red varieties	104	4	0	0	108	0%
White winegrapes						
Chardonnay	8	2	0	0	10	0%
Riesling	2	0	0	0	2	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other White	5	0	0	0	5	0%
Total white varieties	24	2	0	0	26	0%
Unknown variety	17	0	0	0	17	0%
Total all varieties	145	6	0	0	151	0%

Source:
Vinehealth
Australia

Fleurieu other

Current plantings by variety and year planted – Fleurieu zone (other)

<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	36	0	0	0	36	0%
Shiraz	92	0	0	0	92	0%
Other Red	4	0	0	0	4	0%
Total red varieties	132	0	0	0	132	0%
White winegrapes						
Chardonnay	29	0	0	0	29	0%
Pinot Gris	16	0	0	0	16	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	6	0	4	0	10	0%
Total white varieties	64	0	4	0	68	0%
Unknown variety	36	0	0	0	36	0%
Total all varieties	232	0	4	0	236	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

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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:

Wine Australia Market Insights
+61 8 8228 2000
Market.Insights@wineaustralia.com