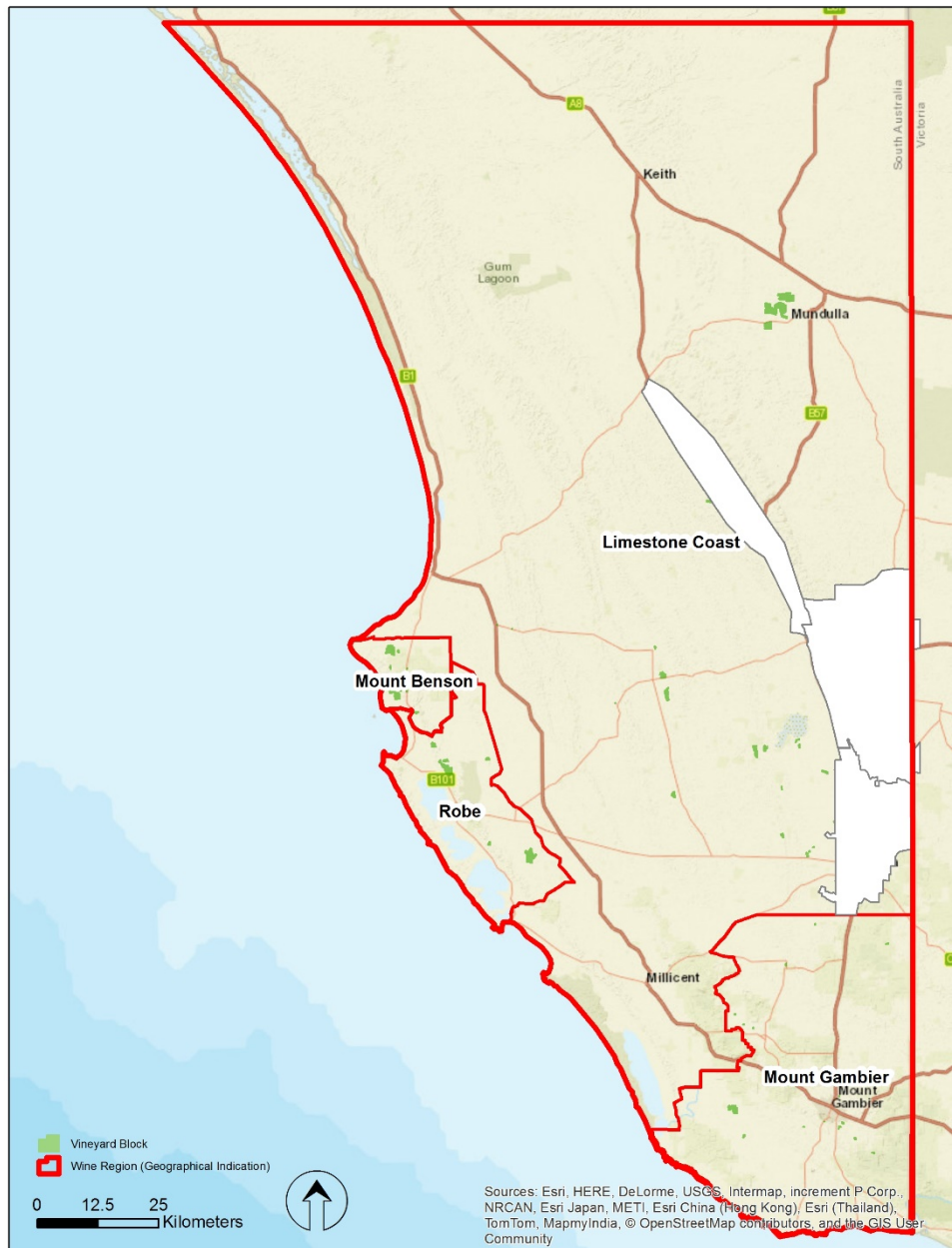


SA Winegrape Crush Survey 2020

Regional Summary Report

Limestone Coast
other

Inc Mt Benson, Mt
Gambier and Robe



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

**Mount Benson, Robe, Mt Gambier,
and Limestone Coast other
Wine Regions**



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Wine Australia July 2020

Limestone Coast other

Vintage overview

VINTAGE REPORT

The grape growers and winemakers of the Mount Benson region have not been entirely immune to the events of 2020. Our season began with some issues early in the piece with poor weather over flowering and a very late spring frost (mid November) causing crop losses in many varieties. Sauvignon Blanc seemed to come through fruit set reasonably well however other varieties, Cabernet Sauvignon in particular, were hit quite badly. It is estimated that overall yields were approximately 60% down in red varieties with whites also yielding lower with a loss of about 30%.

Our ripening season then commenced with a warm to hot start which thankfully cooled into a much more mild January and early February. A lighting storm, which passed over the Mount Benson region on December 30 2019, ignited a bushfire in an area known as Keilira a mere 50km North East from our region. It was a true blessing that the Mount Benson vineyards escaped any associated smoke damage. One of the silver linings of the bushfires for our region was an increase in demand for fruit and new buyers for Mount Benson fruit.

As our season progressed additional challenges arose. The Mount Benson region is a highly maritime environment subject to sea fogs, which roll in and blanket the vineyards in the early mornings in March. In 2020 these fogs arrived in mid to late February, persisting for just on a week and bringing with them a higher disease pressure than normal for that period of ripening. However, with increased vigilance in the vineyard most growers were happy with the fruit condition at harvest. This year we also saw a nice strong Bonney Upwelling. With ocean temperatures dropping just as our harvest season commenced it allowed the region to have a longer cooler vintage with excellent retention of natural acid, a key driver of wine quality in this region.

While production is lower, the quality of fruit and the resultant wine seem at this stage to be excellent. In reds Shiraz has been a standout. Shiraz was not as affected by loss of yield and the bright acidity and freshness of fruit is marking this as a standout variety of the year. In white varieties Sauvignon Blanc looks very promising and Pinot Gris/Grigio also looks like a highlight for the year.

After everything that was thrown at Mount Benson and the wider industry in the 2020 season we are once again thankful for our consistent summers, secure access to water and the milder maritime conditions of our region. It is with true joy and intense pride that we say that this has been an overall successful and high quality vintage.

Anita Goode – Wangolina Station

OVERVIEW OF VINTAGE STATISTICS

Limestone Coast other includes the GI regions of Mount Benson, Mount Gambier and Robe, and the vineyards around Bordertown, Lucindale, and Beachport, as well as those in the Limestone Coast zone but outside the declared GI regions of Padthaway, Coonawarra and Wrattenbully. The total area of vines included in this definition is 3309 hectares.

The reported crush of winegrapes from Limestone Coast other was 11,394 tonnes in 2020, down by 46 per cent compared with the 2019 reported crush of 21,162 tonnes. Over the past five years (up to 2019), the average crush for Limestone Coast other has been 18,957 tonnes, making this year's crush 40 per cent below the five-year average.

There were 28 respondents to the survey who reported crushing grapes from Limestone Coast other in 2020, compared with 31 in 2019.

The total estimated value of winegrapes from Limestone Coast other in 2020 was \$13.1 million compared with \$21.6 million in 2019. The average purchase value of grapes increased from \$1031 per tonne in 2019 to \$1170 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up by 7 per cent to \$1314 per tonne, Cabernet Sauvignon up 19 per cent to \$1294 per tonne and Chardonnay up by 16 per cent to \$907 per tonne.

According to Vinehealth Australia data, the total vineyard area in Limestone Coast other as at 30 April 2020 is 3309 hectares, compared with 3332 hectares in 2019. The total area is around 100 hectares less than it was 5 years ago.

The only new plantings in Limestone Coast other in the 2019-20 planting season were 27 hectares of Cabernet Sauvignon in Robe.

Limestone Coast 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										61	100%	61	\$97,509
Cabernet Sauvignon	1,111			929	142	40	\$1,437,727	\$1,294	19%	1,998	64%	3,109	\$4,022,411
Malbec	90			90					-100%	33	27%	123	\$99,251
Mataro/Mourvedre	65			65						125	66%	190	\$142,380
Merlot	401			401			\$352,540	\$880	0%	909	69%	1,310	\$1,152,268
Montepulciano	9			2	7		\$12,153	\$1,311			0%	9	\$12,153
Petit Verdot	80			80			\$54,365	\$681		184	70%	264	\$179,756
Pinot Noir	125			102	23		\$174,287	\$1,394	20%	160	56%	285	\$397,798
Shiraz	1,320			924	353	42	\$1,734,581	\$1,314	7%	2,004	60%	3,324	\$4,369,066
Tempranillo										15	100%	15	\$24,948
Other red	33			33			\$30,652	\$939			0%	33	\$30,652
Red Total	3,233			2,626	525	82	\$3,917,645	\$1,212	11%	5,490	63%	8,723	\$10,528,190
White													
Chardonnay	311		20	259	32		\$282,176	\$907	16%	1,011	76%	1,323	\$1,199,093
Muscat a petits grains blancs	18			18							0%	18	\$16,623
Pinot Gris/Grigio	45			45			\$51,033	\$1,126	13%	19	29%	64	\$71,999
Prosecco	10				10						0%	10	\$16,448
Riesling													\$0
Sauvignon Blanc	582			582			\$643,325	\$1,105	23%	537	48%	1,120	\$1,236,934
Semillon	18			18					-100%	117	87%	135	\$80,824
Verdelho	1			1							0%	1	\$602
White Total	986		20	923	42		\$1,020,736	\$1,035	20%	1,685	63%	2,671	\$2,622,523
Grand Total	4,220		20	3,550	568	82	\$4,938,381	\$1,170	13%	7,174	63%	11,394	\$13,150,713

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 other

Current plantings by variety and year planted – Mount Benson

<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	114	0	0	0	114	0%
Merlot	52	0	0	0	52	0%
Pinot Noir	2	0	0	0	2	0%
Shiraz	171	0	7	0	178	0%
Other Red	4	0	0	0	4	0%
Total red varieties	343	0	7	0	350	0%
White winegrapes						
Chardonnay	34	0	0	0	34	0%
Pinot Gris	43	0	0	0	43	0%
Sauvignon Blanc	66	0	0	0	66	0%
Other White	10	0	0	0	10	0%
Total white varieties	153	0	0	0	153	0%
Total all varieties	496	0	7	0	503	0%

Source:
Vinehealth
Australia

Limestone Coast other

Current plantings by variety and year planted – Mount Gambier

<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	9	0	0	0	9	0%
Merlot	0	0	0	0	0	0%
Pinot Noir	67	0	0	0	67	0%
Shiraz	0	0	0	0	0	0%
Other Red	0	0	0	0	0	0%
Total red varieties	76	0	0	0	76	0%
White winegrapes						
Chardonnay	40	0	0	0	40	0%
Pinot Gris	14	0	0	0	14	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	95	0	0	0	95	0%
Semillon	1	0	0	0	1	0%
Total white varieties	155	0	0	0	155	0%
Unknown variety	20	0	0	0	20	0%
Total all varieties	251	0	0	0	251	0%

Source:
Vinehealth
Australia

Limestone Coast other

Current plantings by variety and year planted – Robe

<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	225	0	39	27	291	9%
Merlot	36	0	0	0	36	0%
Pinot Noir	55	0	0	0	55	0%
Shiraz	170	0	0	0	170	0%
Other Red	5	0	0	0	5	0%
Total red varieties	491	0	39	27	557	5%
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	2	0	0	0	2	0%
Total white varieties	156	0	0	0	156	0%
Total all varieties	647	0	39	27	713	4%

Source:
Vinehealth
Australia

Limestone Coast other

Current plantings by variety and year planted – Bordertown

<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	415	0	0	0	415	0%
Merlot	219	0	0	0	219	0%
Petit Verdot	43	0	0	0	43	0%
Shiraz	337	0	0	0	337	0%
Other Red	114	0	0	0	114	0%
Total red varieties	1,128	0	0	0	1,128	0%
White winegrapes						
Chardonnay	88	0	0	0	88	0%
Pinot Gris	12	0	0	0	12	0%
Sauvignon Blanc	8	0	0	0	8	0%
Semillon	7	0	0	0	7	0%
Other White	9	0	0	0	9	0%
Total white varieties	124	0	0	0	124	0%
Total all varieties	1,252	0	0	0	1,252	0%

Source:
Vinehealth
Australia

Limestone Coast other

Current plantings by variety and year planted – Limestone Coast 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	337	0	0	0	337	0%
Merlot	45	0	0	0	45	0%
Pinot Noir	10	0	0	0	10	0%
Shiraz	136	0	0	0	136	0%
Other Red	5	0	0	0	5	0%
Total red varieties	533	0	0	0	533	0%
White winegrapes						
Chardonnay	41	0	0	0	41	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other White	2	0	0	0	2	0%
Total white varieties	57	0	0	0	57	0%
Total all varieties	590	0	0	0	590	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:

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