



SA Winegrape Crush Survey 2021

Summary Report

Limestone Coast Zone

Wine Australia July 2021

Limestone Coast zone

Limestone Coast zone* winegrape intake summary table

* Includes Coonawarra, Mt Benson, Mt Gambier, Padthaway, Robe, Wrattenbully and Limestone Coast zone other

Varieties	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	7						7	\$14,200
Cabernet Franc	67	\$65,836	\$978	-25%	384	85%	452	\$502,298
Cabernet Sauvignon	20,652	\$25,189,228	\$1,220	-26%	37,303	64%	57,956	\$71,972,704
Graciano	9				2	21%	11	\$16,680
Lagrein	4				5	57%	9	\$10,142
Malbec	347	\$408,423	\$1,177	19%	1,238	78%	1,585	\$1,975,533
Mataro/Mourvedre	313				369	54%	683	\$515,692
Merlot	3,718	\$2,982,987	\$802	-28%	8,452	69%	12,171	\$9,534,859
Montepulciano	7				5	42%	12	\$16,926
Nebbiolo	16						16	\$37,080
Petit Verdot	257	\$180,457	\$703	-29%	848	77%	1,105	\$765,353
Pinot Meunier					8	100%	8	\$14,278
Pinot Noir	1,893	\$2,511,905	\$1,327	13%	1,920	50%	3,813	\$5,505,466
Sangiovese	68				67	50%	136	\$192,226
Shiraz	16,681	\$19,259,170	\$1,155	-22%	24,887	60%	41,568	\$49,909,690
Tempranillo	91	\$158,902	\$1,754	0%	47	34%	138	\$234,948
Other red	105	\$92,182	\$881	-5%	0	0%	105	\$92,358
Red Total	44,236	\$51,261,423	\$1,159	-24%	75,538	63%	119,774	\$141,310,433
White								
Chardonnay	9,888	\$7,240,759	\$732	-6%	9,575	49%	19,462	\$14,982,484
Fiano	20						20	\$40,560
Gewürztraminer	187				161	46%	348	\$226,202
Pinot Gris/Grigio	2,719	\$2,802,157	\$1,030	-5%	1,873	41%	4,592	\$4,981,010
Prosecco	204	\$166,680	\$819	0%			204	\$166,680
Riesling	246	\$226,189	\$920	0%	2,288	90%	2,534	\$2,402,746
Sauvignon Blanc	2,597	\$2,451,849	\$944	-1%	1,966	43%	4,563	\$4,287,009
Semillon	52	\$32,902	\$638	-3%	519	91%	571	\$467,582
Verdelho	39				123	76%	162	\$69,350
Vermantino					127	100%	127	\$169,285
Viognier	83				163	66%	246	\$280,128
Other white					12	100%	12	\$20,900
White Total	16,035	\$13,181,490	\$822	-7%	16,806	51%	32,841	\$28,093,936
Grand Total	60,271	\$64,442,913	\$1,069	-19%	92,345	61%	152,615	\$169,404,369

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 zone

Limestone Coast zone* current plantings by variety and year planted

* Includes Coonawarra, Mt Benson, Mt Gambier, Padthaway, Robe, Wrattenbully and Limestone Coast zone other

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Cabernet Franc	60	0	4	0	64	0%
Cabernet Sauvignon	6,837	120	394	80	7,431	1%
Grenache	0	0	3	0	3	0%
Malbec	102	0	7	0	109	0%
Merlot	1,097	0	4	1	1,102	0%
Meunier (Pinot Meunier)	2	0	0	0	2	0%
Petit Verdot	63	0	0	0	63	0%
Pinot Noir	326	0	11	0	337	0%
Shiraz	3,862	48	58	135	4,103	3%
Tempranillo	12	0	0	0	12	0%
Other Red	117	2	0	0	119	0%
Total red varieties	12,478	170	481	216	13,345	2%
White winegrapes						
Chardonnay	1,468	3	0	0	1,471	0%
Pinot Gris	322	0	0	0	322	0%
Riesling	204	0	0	0	204	0%
Sauvignon Blanc	438	0	0	0	438	0%
Semillon	34	0	0	0	34	0%
Verdelho	19	0	0	0	19	0%
Viognier	19	0	0	0	19	0%
Other White	76	2	0	0	78	0%
Total white varieties	2,580	5	0	0	2,585	0%
Unknown variety	89	0	0	0	89	0%
Total all varieties	15,147	175	481	216	16,019	0%

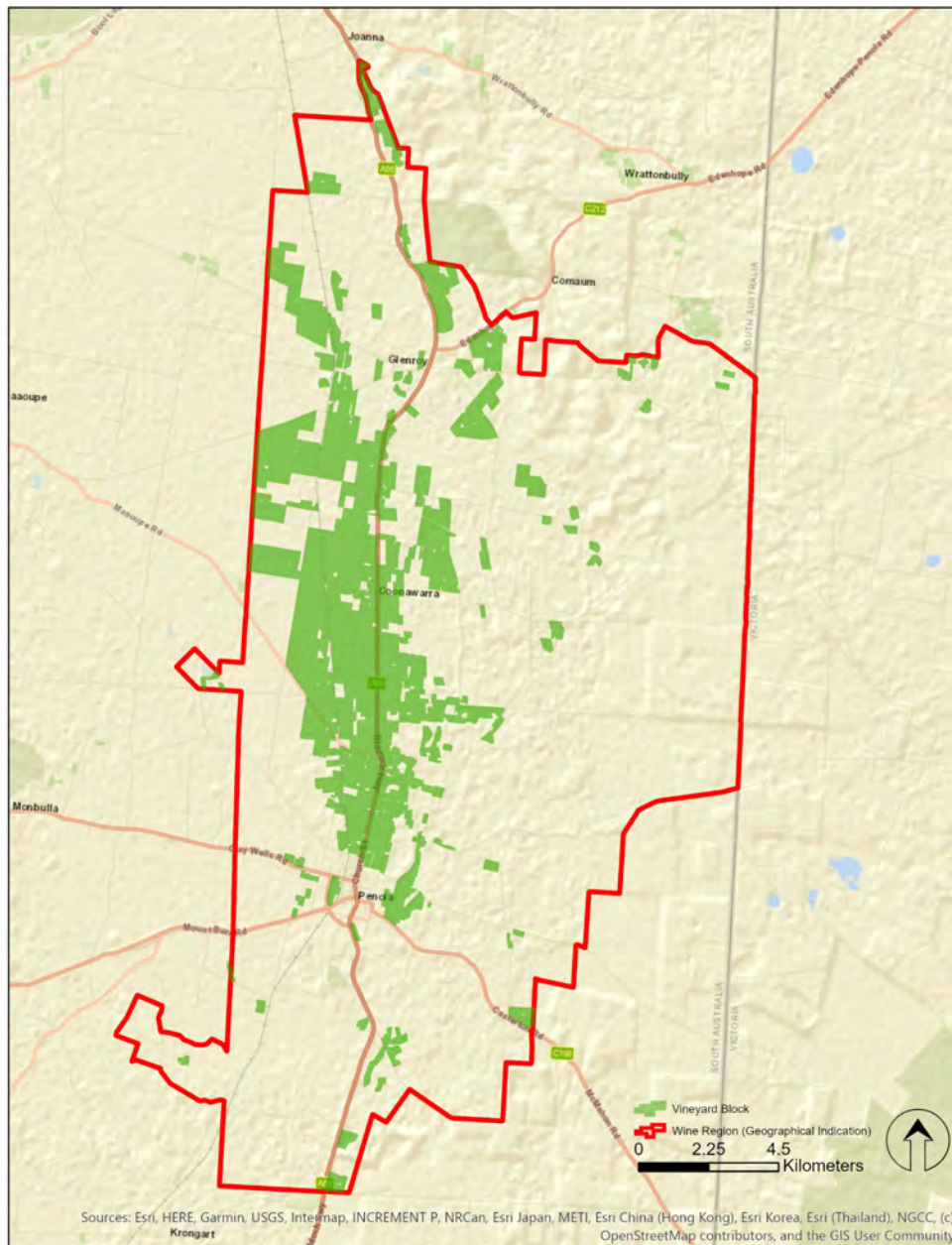
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Coonawarra Wine Region

Wine Australia July 2021



**Coonawarra
Wine Region**



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Coonawarra

Vintage overview

VINTAGE REPORT

The 2021 Vintage in Coonawarra has the hallmarks of an incredible vintage, with superb conditions and fruit of outstanding quality and quantity being harvested.

The season was mild with very stable weather conditions. The temperatures during the growing season were mild with only minor fluctuations and no major rainfall events.

Dry conditions continued right through summer, and consequently berries remained relatively small with thick skins. Coonawarra did receive several small rainfall events during the growing which was beneficial to the general vine health and soil moisture.

These climatic conditions led to long and steady increases in maturity levels, allowing winemakers to pick at optimum levels for ripeness and flavour.

Yields overall are above the long-term average with increased bunch and berry numbers. The increased yields resulted in some bunch thinning at veraison to maintain good flavour and balance.

The 2021 vintage was free of disease, drought, and smoke taint.

The peak harvest for the region began in early April, following the Easter break, and continued until mid-May when the last of the region's signature variety was harvested.

Based on the mild summer, and the colour and aromas that are coming through in the finished ferments, 2021 points to an exceptionally good vintage with lovely firm acidity in the whites and good fruit expression and tannins across all reds, which at this early stage, will translate into wines that have excellent cellaring potential.

Coonawarra Vignerons Board (Coonawarra Grape and Wine Incorporated), April 2021

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Coonawarra winegrapes was 50,199 tonnes in 2021, nearly double the very low 2020 crush of 26,240 tonnes. It was the largest recorded crush for the region since 2004. Over the past five years (up to 2020), the average crush for Coonawarra has been 33,100 tonnes, making this year's crush 52 per cent above the five-year average.

There were 40 respondents to the survey who reported crushing grapes from Coonawarra in 2021, compared with 36 in 2020.

The total estimated value of Coonawarra winegrapes in 2021 was just under \$65.6 million compared with \$44 million in 2020. The higher production was partly offset by a 23 per cent decrease in the average purchase value of grapes, which declined from \$1723 overall in 2020 to \$1318 per tonne.

There were decreases in average prices for all the major varieties except Pinot Noir, which increased 21 per cent to \$1550 per tonne. Cabernet Sauvignon decreased by 24 per cent to \$1424 per tonne.

The price dispersion data shows a downward shift in prices paid, with 37 per cent of grapes purchased at \$1500 and above, compared with 77 per cent in 2020, while 14 per cent was purchased at below \$600 per tonne, compared with none in 2020.

According to Vinehealth Australia data, the total vineyard area in Coonawarra as at 30 April 2021 is 5841 hectares, virtually identical to the previous year, and around 20 hectares more than it was 5 years ago.

New plantings in the region declined dramatically from 222 hectares in the 2019–20 season to just 12 hectares in 2020–21, almost all of them Cabernet Sauvignon.

Coonawarra

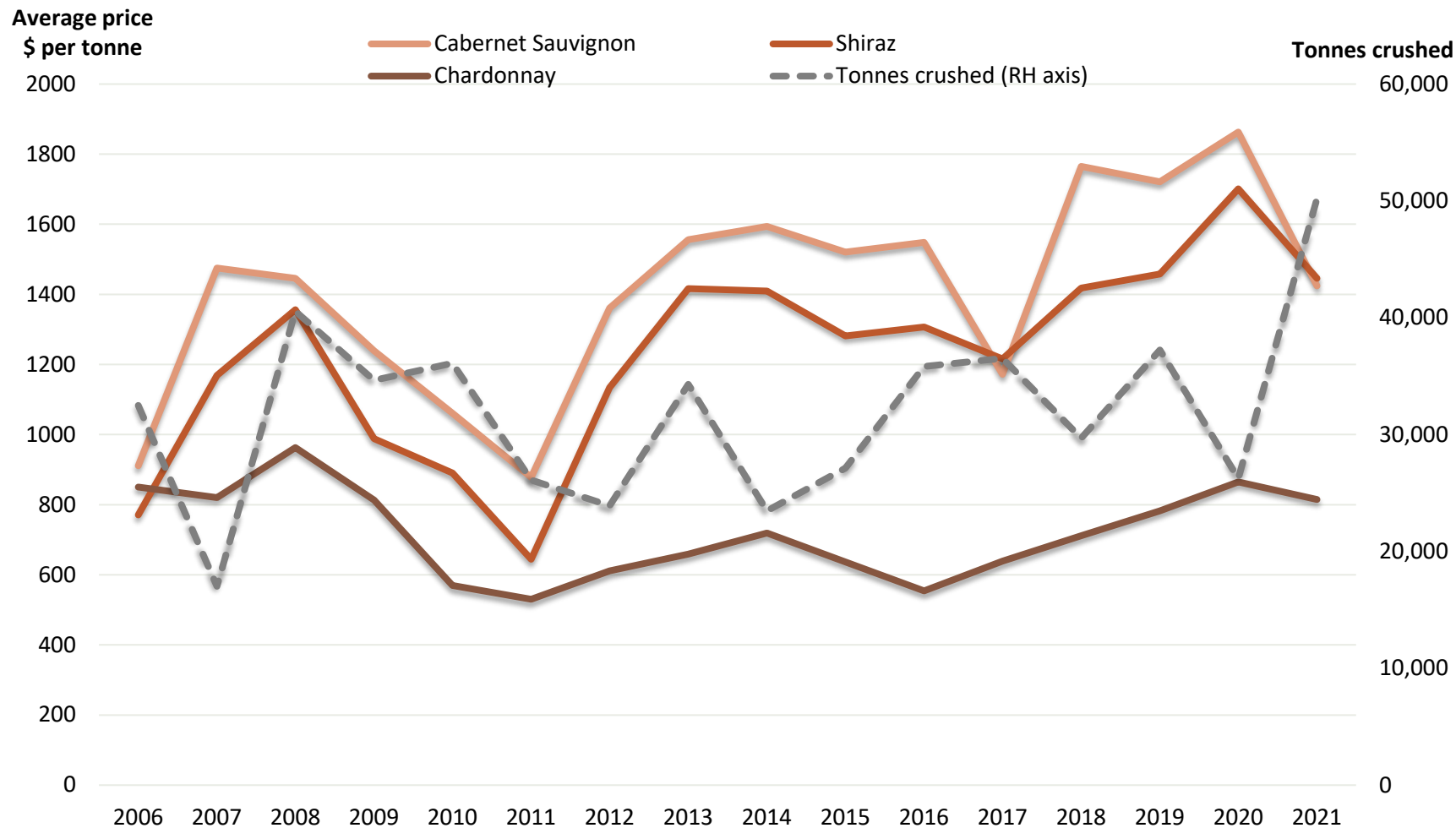
Winegrape intake summary table

Varieties	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								
Cabernet Franc	16				104	86%	120	\$163,024
Cabernet Sauvignon	8,398	\$11,956,141	\$1,424	-24%	19,684	70%	28,081	\$39,979,540
Malbec	29				162	85%	191	\$426,377
Merlot	1,126	\$710,168	\$631	-51%	3,215	74%	4,341	\$2,738,528
Nebbiolo	16						16	\$37,080
Petit Verdot	34				393	92%	427	\$255,983
Pinot Meunier					8	100%	8	\$14,278
Pinot Noir	113	\$175,769	\$1,550	21%	323	74%	437	\$676,957
Shiraz	2,187	\$3,163,818	\$1,446	-15%	9,597	81%	11,785	\$17,045,070
Tempranillo					8	100%	8	\$13,219
Other red	12				0	2%	12	\$9,408
Red Total	11,931	\$16,159,156	\$1,354	-24%	33,495	74%	45,426	\$61,359,464
White								
Chardonnay	609	\$496,956	\$815	-6%	2,216	78%	2,825	\$2,303,781
Pinot Gris/Grigio	36						36	\$35,950
Riesling	24				482	95%	506	\$594,082
Sauvignon Blanc	259	\$252,868	\$977	-7%	892	77%	1,150	\$1,123,681
Semillon	31				220	88%	251	\$150,686
Other white					4	100%	4	\$9,841
White Total	959	\$832,480	\$868	-6%	3,814	80%	4,773	\$4,218,022
Grand Total	12,891	\$16,991,636	\$1,318	-23%	37,308	74%	50,199	\$65,577,486

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

Coonawarra

Historical weighted average price vs tonnes crushed



Coonawarra

Price dispersion – purchased grapes

Tonnes purchased in each price segment						Total tonnes purchased
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Cabernet Franc			9	7		16
Cabernet Sauvignon	1,020	340	3,477	2,049	1,512	8,398
Malbec					29	29
Merlot	721	93	294	18		1,126
Nebbiolo					16	16
Petit Verdot		34				34
Pinot Noir		4	33	57	19	113
Shiraz	65	28	984	797	313	2,187
Other red		12				12
Red Total	1,807	510	4,798	2,928	1,890	11,931
White						
Chardonnay		419	191			609
Pinot Gris/Grigio			36			36
Riesling			24			24
Sauvignon Blanc		24	235			259
Semillon		31				31
White Total		474	485			959
Total purchased	1,807	983	5,283	2,928	1,890	12,891

Coonawarra

Current plantings by variety and year planted

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Cabernet Franc	21	0	4	0	25	0%
Cabernet Sauvignon	3,522	18	212	11	3,763	0%
Malbec	18	0	2	0	20	0%
Merlot	354	0	4	1	359	0%
Meunier (Pinot Meunier)	2	0	0	0	2	0%
Petit Verdot	17	0	0	0	17	0%
Pinot Noir	36	0	0	0	36	0%
Shiraz	1,164	5	0	0	1,169	0%
Tempranillo	3	0	0	0	3	0%
Other Red	5	2	0	0	7	0%
Total red varieties	5,142	25	222	12	5,401	0%
White winegrapes						
Chardonnay	255	3	0	0	258	0%
Riesling	45	0	0	0	45	0%
Sauvignon Blanc	91	0	0	0	91	0%
Semillon	12	0	0	0	12	0%
Other White	10	0	0	0	10	0%
Total white varieties	413	3	0	0	416	0%
Unknown variety	24	0	0	0	24	0%
Total all varieties	5,579	28	222	12	5,841	0%

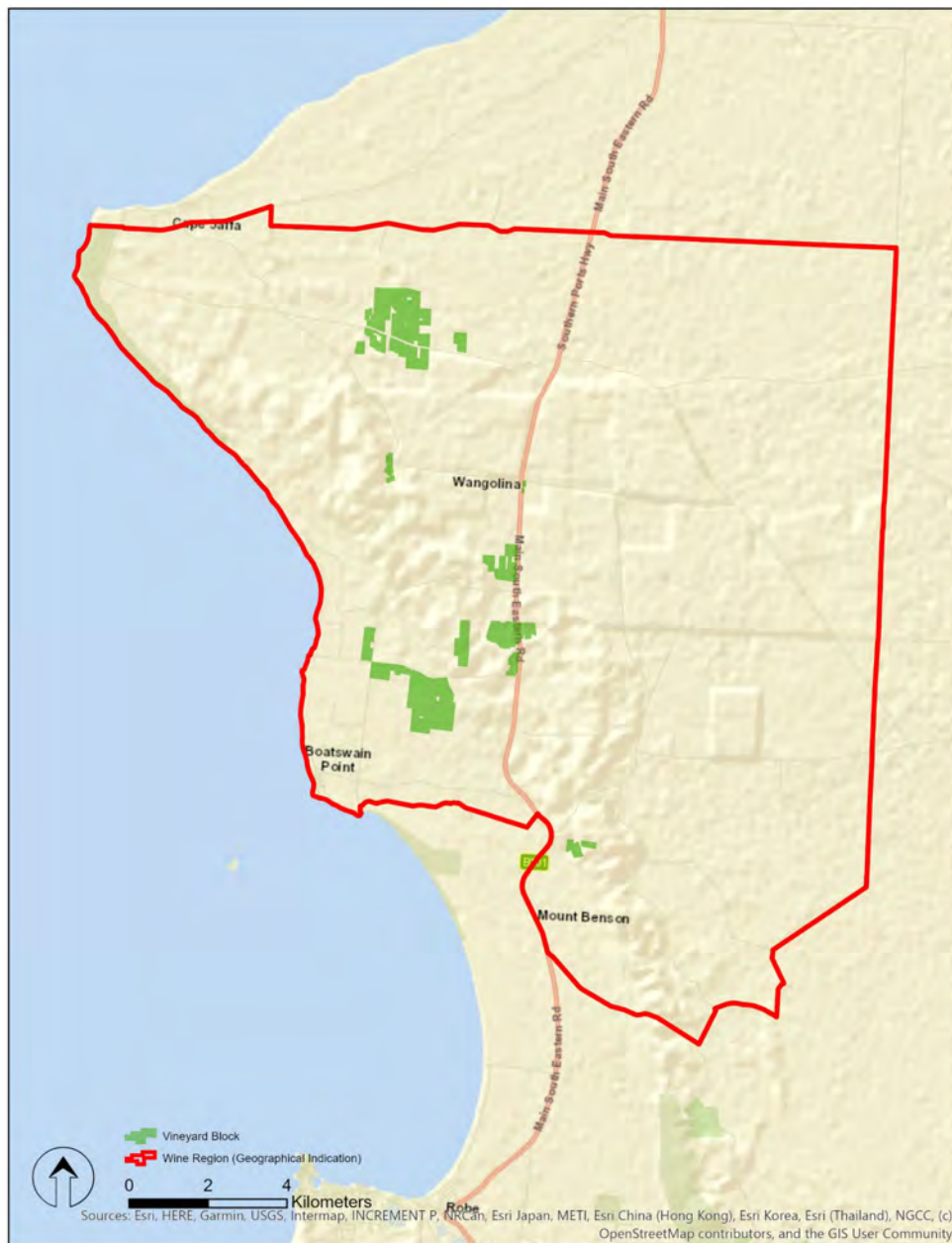
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Mount Benson 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

**Mount Benson
Wine Region**



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Mount Benson

Vintage overview

VINTAGE REPORT

Like many South Australian regions, the Mount Benson 2021 vintage is touted as a one in twenty for both quality and yield.

The season started with budburst from late August to early September, after a quite dry July and mild winter. The flowering period was warm and dry with minimal wind giving us a good even set. The season progressed to be overall quite mild, stable and with only minor rainfall events. The cooler conditions of the 2021 summer led to an extension of the season with slow accumulative ripening. There was just one day of reasonably intense heat in late January, with some vineyards experiencing the after-effects of heat stress (loss of leaf and yield).

Commencing in late February the white grapes' harvest produced much larger than expected yields in both Sauvignon Blanc and Pinot Gris. Flavour development in these two varieties was excellent with bright and vibrant aromatics showing. The red grape harvest commenced after Easter with the bulk of the red harvested in late April to early May at higher than average sugar levels. With high yielding crops demonstrating the hallmarks of outstanding quality, growers were happy and winemakers confident in the intense colour and depth that these wines show.

The region was unhampered by disease, with minimal disease pressure coming from the cooler and dry conditions of the vintage and the absence of our usual, early March sea fogs. As the season progressed, we did see some rain events that did not seem to hamper ripening.

Once again, the consistent cooler nature of the Mount Benson region has allowed the region to produce wines that display aromatic depth, bright colour in red wines, density and intensity. We look forward to these wines becoming available on the market. The 2021 Mount Benson vintage will be a vintage for drinkers and collectors alike

Anita Goode, Wangolina

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Mount Benson winegrapes was 2980 tonnes in 2021, up by 32 per cent compared with the 2020 crush of 2260 tonnes. Over the past five years (up to 2020), the average crush for Mount Benson has been 2429 tonnes, making this year's crush 23 per cent above the five-year average.

There were 10 respondents to the survey who reported crushing grapes from Mount Benson in 2021, the same as in 2020 and 2019.

The total estimated value of Mount Benson winegrapes in 2021 was just over \$3.5 million compared with \$3.2 million in 2020. The higher production was partly offset by a 15 per cent decrease in the average purchase value of grapes, which declined from \$1436 overall in 2020 to \$1219 per tonne.

There were decreases in average prices for the major red varieties, while the whites showed small increases. Cabernet Sauvignon decreased by 18 per cent to \$1396 per tonne and Shiraz decreased by 23 per cent to \$1260 per tonne. Pinot Gris/Grigio increased by 3 per cent to \$1159 per tonne, while Sauvignon Blanc increased by 2 per cent to \$1107 per tonne.

The price dispersion data shows that over half the grapes were purchased at between \$900 and \$1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in Mount Benson as at 30 April 2021 is 508 hectares, virtually identical to the area the previous year and 5 years ago.

Mount Benson has roughly twice the vineyard area of Mount Gambier, and two-thirds the area of Robe.

Mount Benson

Winegrape intake summary table

Varieties	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								
Cabernet Sauvignon	364	\$508,300	\$1,396	-18%	161	31%	525	\$733,018
Merlot	115	\$108,848	\$945	-3%	201	64%	316	\$298,276
Shiraz	930	\$1,172,077	\$1,260	-23%	142	13%	1,072	\$1,351,444
Red Total	1,409	\$1,789,225	\$1,270	-19%	504	26%	1,913	\$2,382,738
White								
Chardonnay	93				265	74%	359	\$358,524
Pinot Gris/Grigio	183	\$212,035	\$1,159	3%			183	\$212,035
Sauvignon Blanc	324	\$359,184	\$1,107	2%	191	37%	516	\$571,100
Semillon	10						10	\$7,795
White Total	610	\$672,434	\$1,101	-1%	456	43%	1,067	\$1,149,454
Grand Total	2,020	\$2,461,659	\$1,219	-15%	960	32%	2,980	\$3,532,192

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

Mount Benson

Price dispersion – purchased grapes

	Tonnes purchased by price segment					Total tonnes purchased
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Cabernet Sauvignon	12		230	98	23	364
Merlot		38	77			115
Shiraz	43	106	399	358	23	930
Red Total	55	144	707	456	47	1,409
White						
Chardonnay			93			93
Pinot Gris/Grigio			178	5		183
Sauvignon Blanc			324			324
Semillon		10				10
White Total		10	596	5		610
Total purchased	55	154	1,303	461	47	2,020

Mount Benson

Current plantings by variety and year planted

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Cabernet Sauvignon	115	0	0	0	115	0%
Merlot	52	0	0	0	52	0%
Pinot Noir	2	0	0	0	2	0%
Shiraz	171	7	0	9	187	5%
Other red	3	0	0	0	3	0%
Total red varieties	343	7	0	9	359	3%
White winegrapes						
Chardonnay	34	0	0	0	34	0%
Pinot Gris	43	0	0	0	43	0%
Sauvignon Blanc	61	0	0	0	61	0%
Other White	11	0	0	0	11	0%
Total white varieties	149	0	0	0	149	0%
Unknown	0	0	0	0	0	0%
Total all varieties	492	7	0	9	508	2%

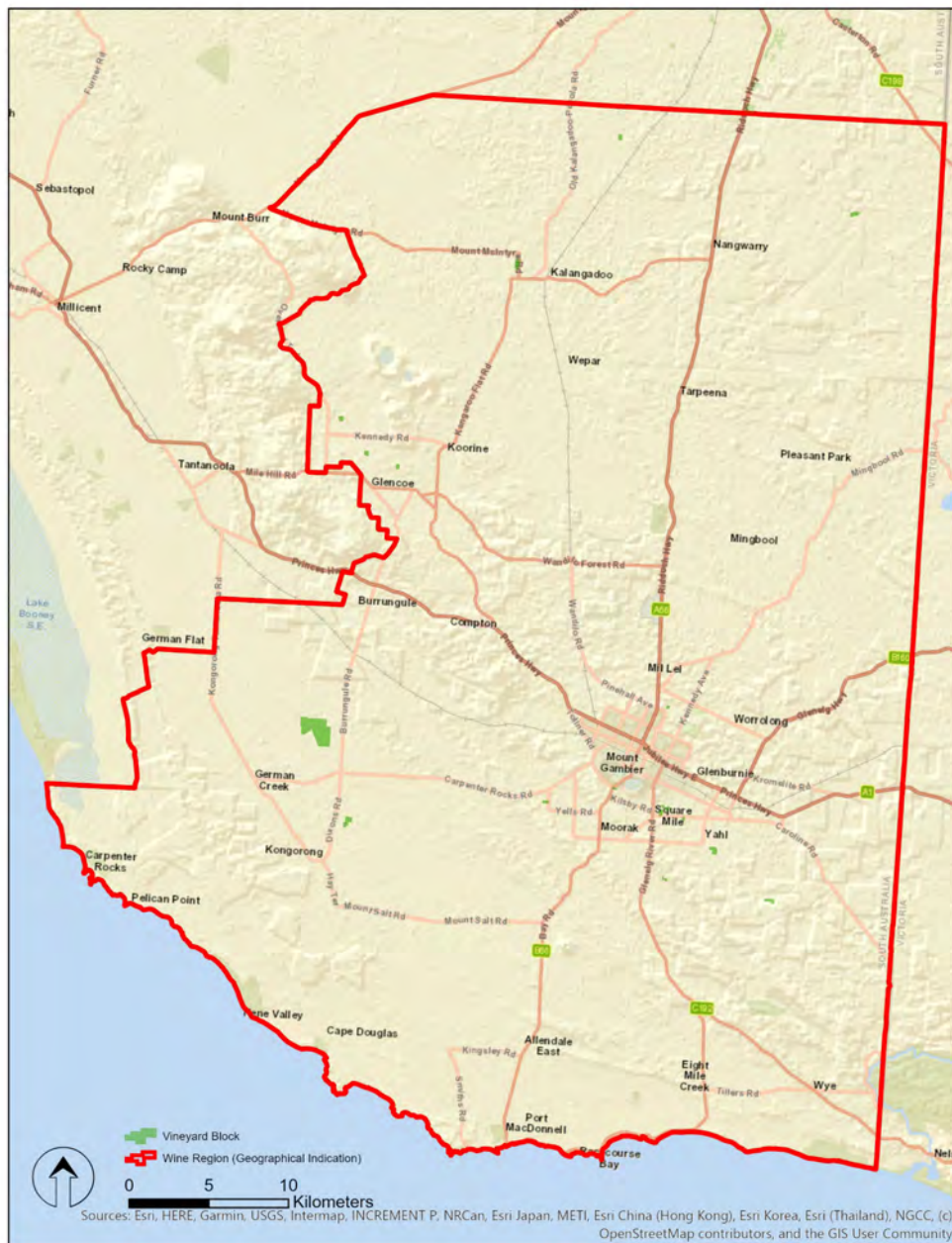
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Mount Gambier 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

Mount Gambier Wine Region



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Mount Gambier

Winegrape intake summary table

Varieties	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								
Pinot Noir	158	\$226,028	\$1,432	-2%	8	5%	166	\$237,630
Red Total	158	\$226,028	\$1,432	-2%	8	5%	166	\$237,630
White								
Chardonnay	99	\$121,841	\$1,229	5%	3	2%	102	\$124,924
Pinot Gris/Grigio	11				6	33%	17	\$25,455
Riesling	15				9	39%	24	\$35,625
Sauvignon Blanc	510	\$598,912	\$1,174	2%			510	\$598,912
White Total	635	\$759,603	\$1,196	3%	17	3%	652	\$784,916
Grand Total	793	\$985,631	\$1,243	3%	25	3%	818	\$1,022,546

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

Mount Gambier

Price dispersion – purchased grapes

	Tonnes purchased by price segment			Total tonnes purchased
Varieties	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	
Red				
Pinot Noir		80	78	158
Red Total		80	78	158
White				
Chardonnay	14	56	29	99
Pinot Gris/Grigio			11	11
Riesling			15	15
Sauvignon Blanc	17	493		510
White Total	30	550	55	635
Total purchased	30	629	133	793

Mount Gambier

Current plantings by variety and year planted

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	0%
Pinot Noir	67	0	0	0	67	0%
Other Red	1	0	0	0	1	0%
Total red varieties	77	0	0	0	77	0%
White winegrapes						
Chardonnay	40	0	0	0	40	0%
Pinot Gris	14	0	0	0	14	0%
Sauvignon Blanc	95	0	0	0	95	0%
Other White	6	0	0	0	6	0%
Total white varieties	155	0	0	0	155	0%
Unknown	19	0	0	0	19	0%
Total all varieties	251	0	0	0	251	0%

Source:
Vinehealth
Australia

Padthaway

Vintage overview

VINTAGE REPORT

Padthaway has had an outstanding vintage, with fantastic growing conditions, fruit quality and quantity.

The consistency and stability of the weather during the growing season, with adequate rainfall over winter and then mild temperatures with minimal heat spikes during the growing season allowed the vines to regulate their vigour and provided great conditions for flowering and fruit set with very little vine stress. This resulted in even maturity at harvest and yields above the long-term average.

The 2021 Padthaway vintage started with Chardonnay for sparkling base on 12th Feb and concluded with Cabernet Sauvignon on 28th April. Winemakers' comments on the vintage are that they had to be patient in waiting for the whites to ripen and acid levels to be in balance with flavours. The resultant wines are vibrant with great flavours and natural acids.

The vintage conditions allowed the red fruit to ripen and winemakers to pick at optimum fruit ripeness. The reds have exceptional colour intensity and great fruit expression, firm acidity and ripe tannins – an overall impressive vintage!

*Leisha Munro, President
Padthaway Grape Growers Association*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Padthaway was 43,802 tonnes, nearly three times the very low crush of 16,428 tonnes in 2020, and the largest crush reported since 2016.

Over the past five years (up to 2020), the average crush for Padthaway has been 32,188 tonnes, making this year's crush 36 per cent above the five-year average.

There were 19 respondents to the survey who reported crushing grapes from Padthaway in 2021, compared with 21 in 2020.

The total estimated value of winegrapes from Padthaway in 2021 was just under \$43.5 million, compared with \$17.7 million in 2020. The increase in production was partly offset by a decrease in the overall average value of grapes, which decreased from \$1063 in 2020 to \$984 in 2021.

There were decreases in average prices for all major varieties except Pinot Noir (up 17 per cent to \$1307 per tonne), and Chardonnay (up 1 per cent to \$701 per tonne). Shiraz decreased by 19 per cent to \$1162 per tonne and Cabernet Sauvignon these are weighbridge prices and do not include end-use bonuses. It has previously been found that Padthaway and Wrattenbully have larger adjustments made to their prices post-weighbridge than any other GI regions in South Australia, adding up to 30 per cent to the final value.

According to Vinehealth Australia data, the total vineyard area in Padthaway as at 30 April 2021 is 4131 hectares, compared with 3959 hectares in 2020 and 4019 hectares in 2016.

Padthaway had more new area planted in 2020–21 (190 hectares) than any other GI region in South Australia. Two-thirds of the new plantings were Shiraz (121 hectares) and one-third Cabernet Sauvignon (69 hectares).

Padthaway

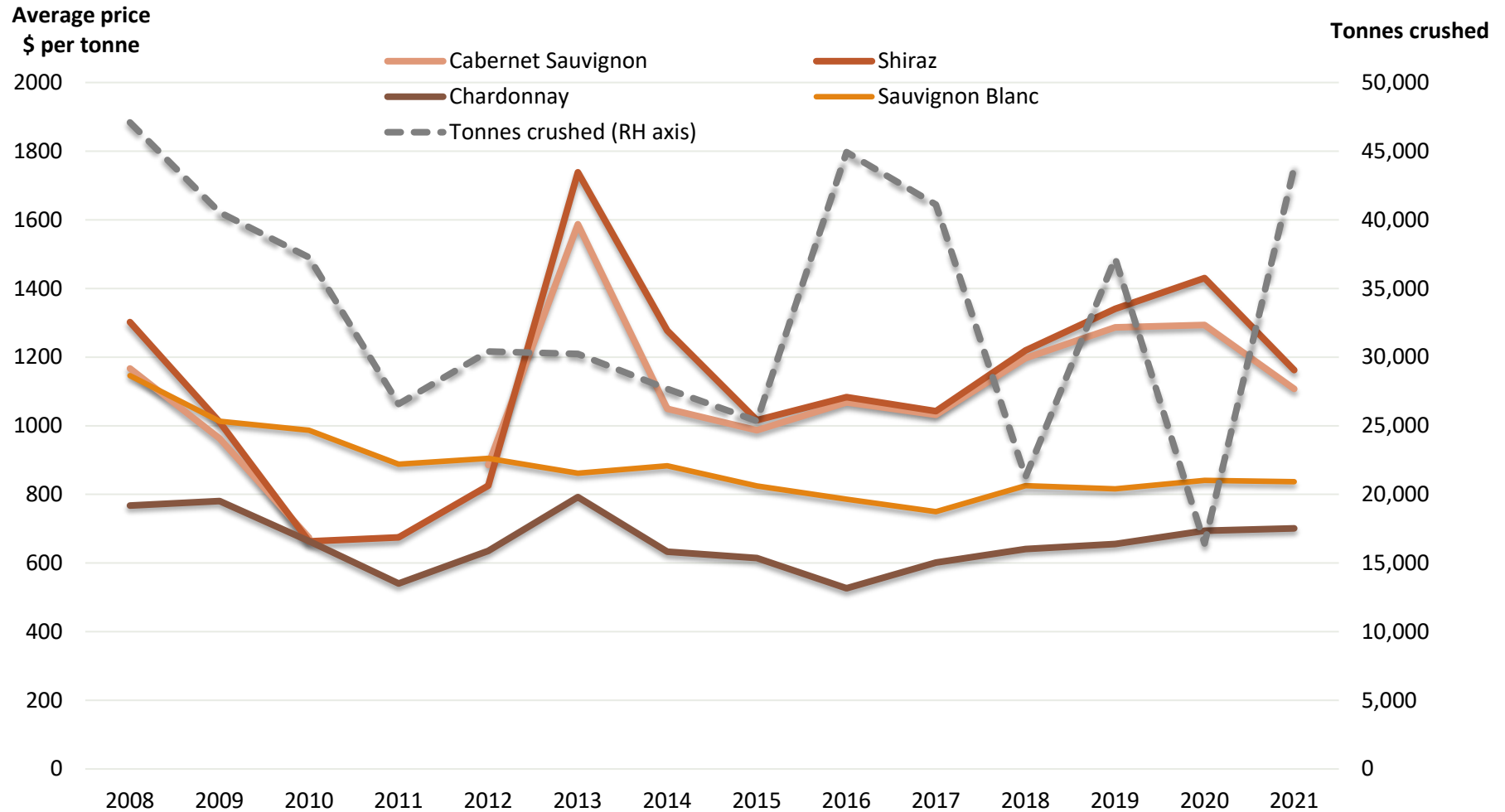
Winegrape intake summary table

Varieties	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								
Cabernet Franc					80	100%	80	\$124,017
Cabernet Sauvignon	5,079	\$5,623,000	\$1,107	-14%	3,997	44%	9,076	\$10,048,551
Graciano	9				2	21%	11	\$16,680
Malbec	151	\$179,407	\$1,186	0%	895	86%	1,046	\$1,240,842
Merlot	647	\$555,704	\$858	-4%	1,534	70%	2,181	\$1,872,447
Pinot Noir	1,227	\$1,603,711	\$1,307	17%	110	8%	1,337	\$1,746,889
Sangiovese	68						68	\$96,920
Shiraz	7,187	\$8,353,463	\$1,162	-19%	6,042	46%	13,229	\$15,375,495
Tempranillo	15				2	10%	17	\$41,550
Red Total	14,384	\$16,462,605	\$1,145	-13%	12,661	47%	27,045	\$30,563,393
White								
Chardonnay	7,263	\$5,090,865	\$701	1%	3,392	32%	10,655	\$7,468,143
Gewürztraminer	187				161	46%	348	\$226,202
Pinot Gris/Grigio	2,061	\$2,065,465	\$1,002	-0%	6	0%	2,067	\$2,071,318
Riesling	207				1,688	89%	1,896	\$1,611,447
Sauvignon Blanc	1,151	\$962,805	\$837	-0%	192	14%	1,343	\$1,123,630
Verdelho	39				116	75%	155	\$61,968
Vermantino					127	100%	127	\$169,285
Viognier	83				76	48%	159	\$158,840
Other white					7	100%	7	\$11,059
White Total	10,991	\$8,515,769	\$775	-4%	5,765	34%	16,757	\$12,901,891
Grand Total	25,375	\$24,978,374	\$984	-7%	18,427	42%	43,802	\$43,465,284

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

Padthaway

Historical weighted average price vs tonnes crushed



Padthaway

Price dispersion – purchased grapes

	Tonnes purchased in each price segment					Total tonnes purchased
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Cabernet Sauvignon		14	4,638	426		5,079
Graciano				9		9
Malbec			151			151
Merlot		228	420			647
Pinot Noir			722	505		1,227
Sangiovese			29	39		68
Shiraz	124	668	5,749	444	203	7,187
Tempranillo					15	15
Red Total	124	910	11,709	1,423	217	14,384
White						
Chardonnay	977	5,603	683			7,263
Gewürztraminer		187				187
Pinot Gris/Grigio		191	1,870			2,061
Riesling		207				207
Sauvignon Blanc		524	627			1,151
Verdelho	39					39
Viognier			83			83
White Total	1,016	6,712	3,263			10,991
Total purchased	1,140	7,622	14,973	1,423	217	25,375

Padthaway

Current plantings by variety and year planted

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Cabernet Franc	8	0	0	0	8	0%
Cabernet Sauvignon	984	67	85	69	1,205	6%
Malbec	78	0	0	0	78	0%
Merlot	167	0	0	0	167	0%
Pinot Noir	86	0	11	0	97	0%
Shiraz	1,177	26	22	121	1,346	9%
Other Red	10	0	0	0	10	5%
Total red varieties	2,510	93	118	190	2,911	7%
White winegrapes						
Chardonnay	747	0	0	0	747	0%
Pinot Gris	138	0	0	0	138	0%
Riesling	148	0	0	0	148	0%
Sauvignon Blanc	83	0	0	0	83	0%
Verdelho	19	0	0	0	19	0%
Viognier	19	0	0	0	19	0%
Other White	27	0	0	0	27	0%
Total white varieties	1,181	0	0	0	1,181	0%
Unknown	39	0	0	0	39	0%
Total all varieties	3,730	93	118	190	4,131	5%

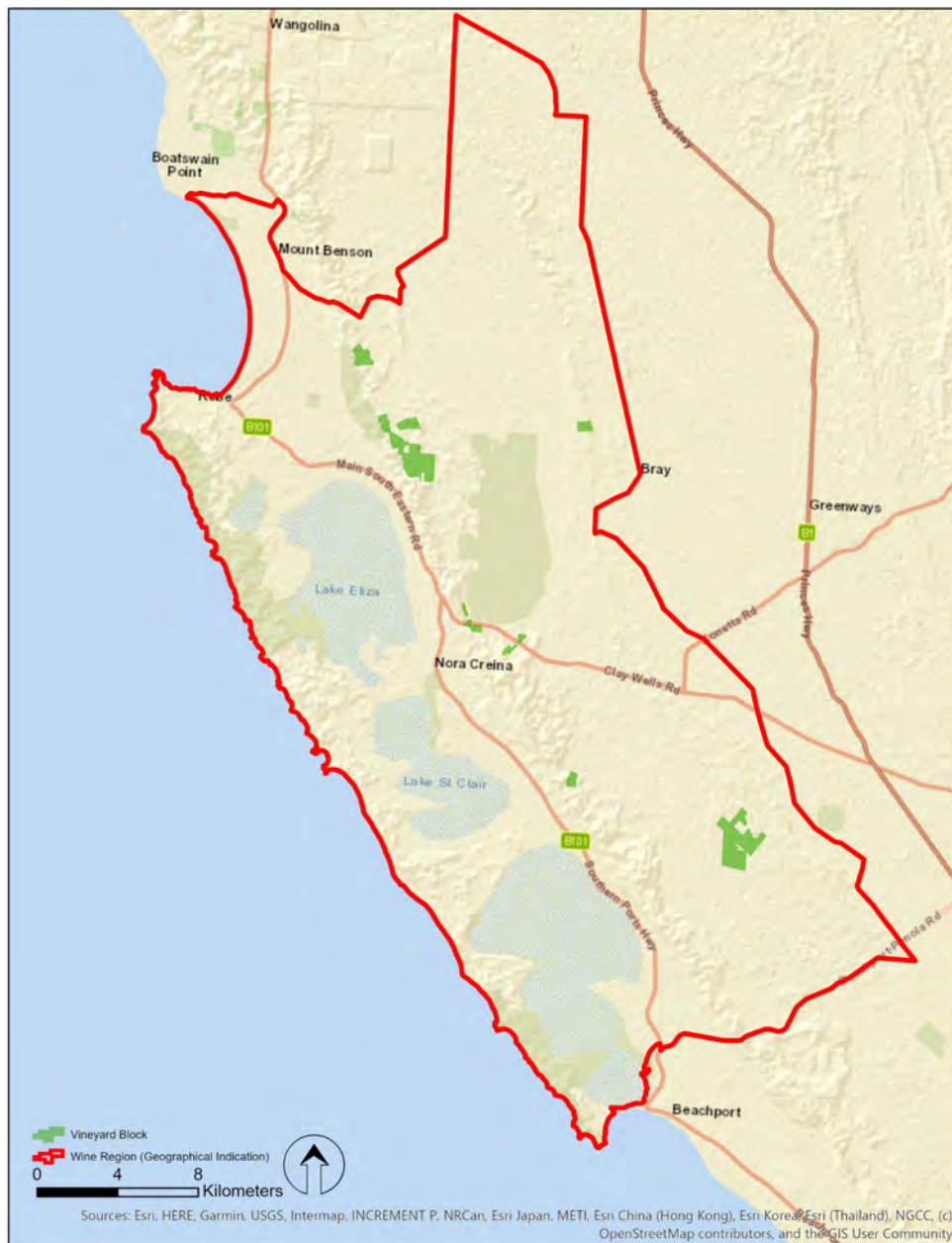
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Robe 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

Robe
Wine Region



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Robe

Winegrape intake summary table

Varieties	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								
Cabernet Sauvignon	203	\$242,549	\$1,193	0%	681	77%	885	\$1,054,917
Merlot	14				18	56%	33	\$36,839
Pinot Noir					795	100%	795	\$1,558,196
Shiraz	296	\$343,547	\$1,159	-12%	834	74%	1,130	\$1,309,411
Tempranillo					20	100%	20	\$34,089
Red Total	514	\$602,449	\$1,171	-7%	2,348	82%	2,862	\$3,993,453
White								
Chardonnay					1,088	100%	1,088	\$1,276,283
Sauvignon Blanc					108	100%	108	\$129,475
Semillon					206	100%	206	\$207,928
White Total					1,402	100%	1,402	\$1,613,686
Grand Total	514	\$602,449	\$1,171	-7%	3,750	88%	4,264	\$5,607,139

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

Robe

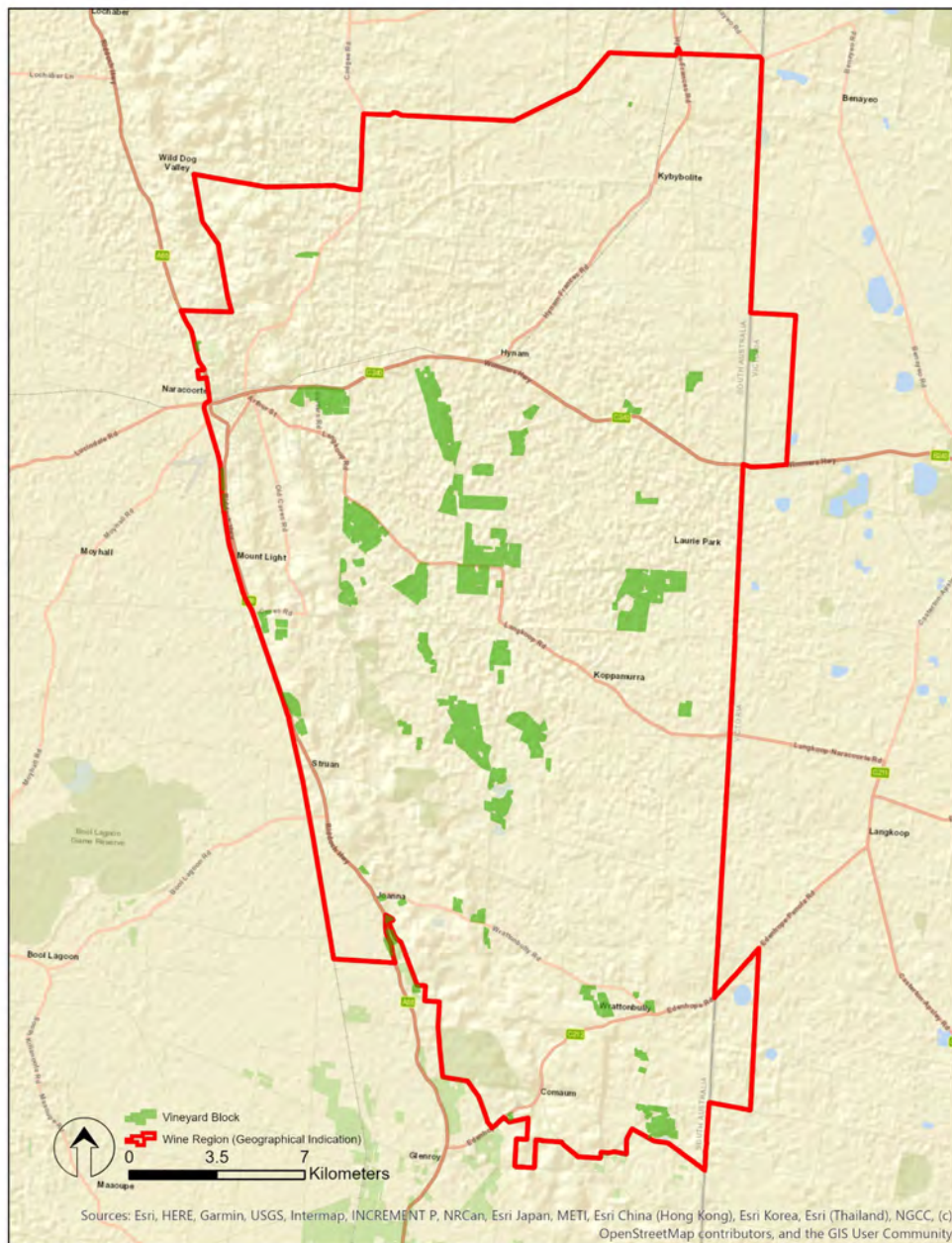
Current plantings by variety and year planted

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Cabernet Sauvignon	232	35	27	0	294	0%
Merlot	37	0	0	0	37	0%
Pinot Noir	61	0	0	0	61	0%
Shiraz	170	0	0	0	170	0%
Other Red	5	0	0	0	5	0%
Total red varieties	505	35	27	0	567	0%
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	12	0	0	0	12	0%
Other White	0	0	0	0	0	0%
Total white varieties	166	0	0	0	166	0%
Unknown	0	0	0	0	0	0%
Total all varieties	671	35	27	0	733	0%

Source:
Vinehealth
Australia

Regional Summary Report

Wrattonbully Wine Region

Wine Australia July 2021

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Wrattonbully Wine Region



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Wrattonbully

Vintage overview

VINTAGE REPORT

The 2021 vintage will go down as one of the best vintages for a number of years - probably as far back as 2004. It was kind to both grape growers and winemakers with average to slightly above average yields and high quality across all varieties.

The season started well, with reasonable winter rainfall leading to near full soil moisture profiles. Moderate rainfall continued throughout early spring, allowing for excellent canopy growth and development of flowering parts of the vine. The mild and dry conditions throughout late spring allowed the vines to flower quickly and evenly (although later than usual), leading to an excellent set across all varieties.

The mild and dry conditions carried on throughout summer. There was a distinct lack of weather extremes with no wet cold spells or heat waves for the vines to contend with. These conditions continued on into February, March and April, which allowed for a slow and very even ripening of the fruit, with flavours, tannins and Baumés developing well across all varieties.

Harvesting of early white varieties commenced in late February, but most of the harvesting occurred in mid- to late-March, which is slightly later than the long-term average. With excellent canopy conditions combined with favourable weather at harvest, the whites are showing strong varietal characters and high crisp natural acidity.

The cooler ripening conditions pushed the harvest of red varieties out, with the bulk of the red harvest taking place in mid- to late-April. The dry and mild conditions allowed for the reds to be harvested at optimal ripeness, with more moderate Baumés than the past few seasons. It is one of those years that it is hard to pick out a standout variety as all varieties both reds and whites performed exceptionally well, with standout parcels for each one.

*Tim Fletcher, Chairperson
Wrattonbully Wine Region Association.*

OVERVIEW OF VINTAGE STATISTICS

After recording its lowest crush since 2007 last year, the crush from Wrattonbully in 2021 was 32,738 tonnes, the largest ever reported. Over the past five years (up to 2020), the average crush for Wrattonbully has been 20,231 tonnes, making this year's crush 62 per cent above the five-year average.

There were 22 respondents to the survey who reported crushing grapes from Wrattonbully in 2021, compared with 24 in 2020.

The total estimated value of winegrapes from Wrattonbully in 2021 was \$35 million, compared with \$17.1 million in 2020. The increase in production was partly offset by an overall decrease in the average purchase value of grapes, which decreased by 24 per cent from \$1379 per tonne in 2020 to \$1052 per tonne.

There were decreases in average prices for the three largest varieties: Cabernet Sauvignon down by 27 per cent to \$1128 per tonne, Shiraz down 29 per cent to \$1092 per tonne and Chardonnay down 19 per cent to \$810 per tonne. It should be noted that these are weighbridge prices and do not include end-use bonuses. It has previously been found that Padthaway and Wrattonbully have larger adjustments made to their prices post-weighbridge than any other GI regions in South Australia, adding up to 30 per cent to the final value.

The price dispersion data shows that there was a downward shift in prices, with 34 per cent of tonnages purchased at below \$900 per tonne, compared with 18 per cent in 2020.

According to Vinehealth Australia data, the total vineyard area in Wrattonbully as at 30 April 2021 is 2713 hectares, 19 hectares fewer than in 2020 and 40 hectares more than it was five years ago.

There were virtually no new plantings in the 2020–21 planting season.

Wrattonbully

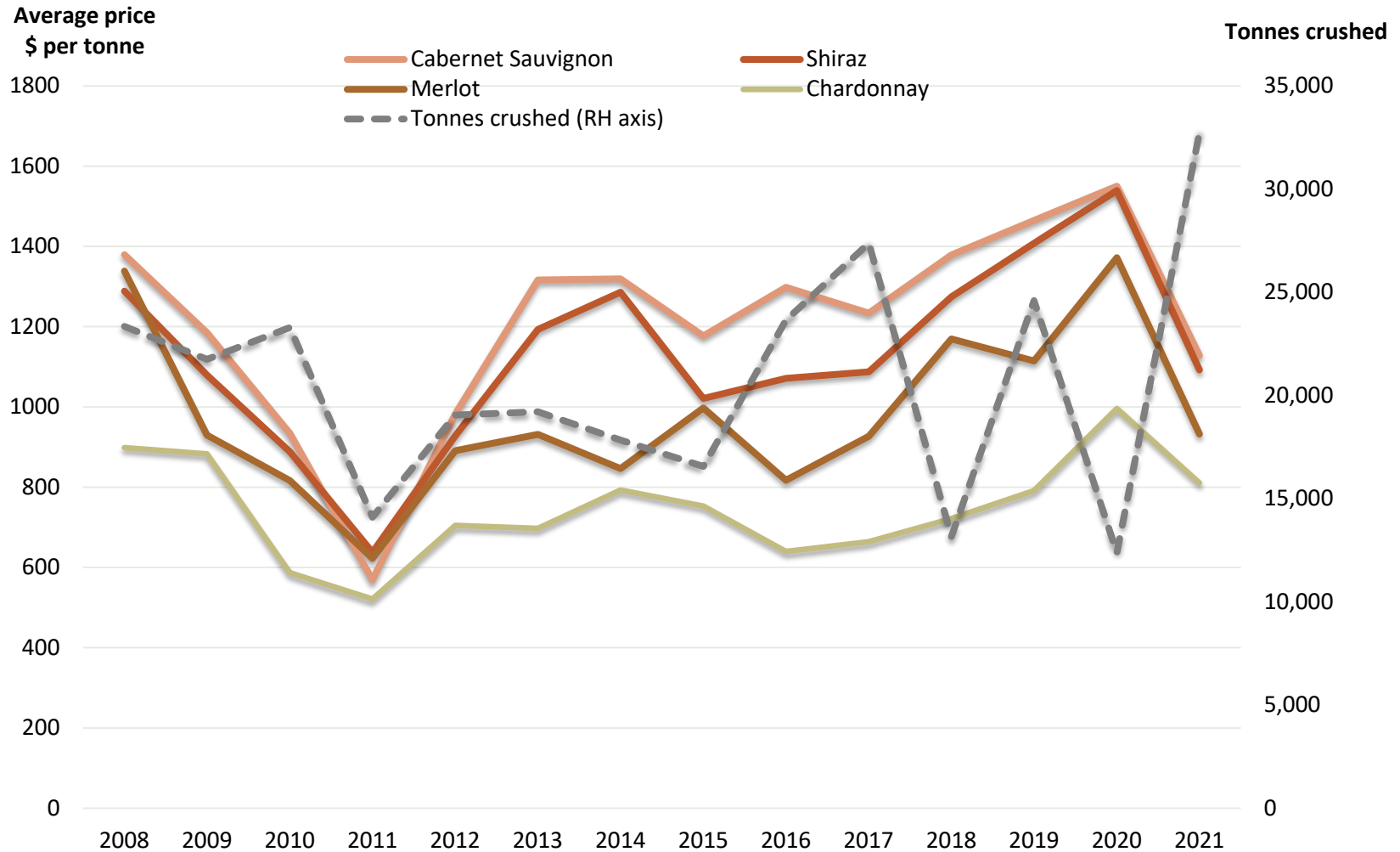
Winegrape intake summary table

Varieties	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	7						7	\$14,200
Cabernet Sauvignon	4,379	\$4,938,583	\$1,128	-27%	8,587	66%	12,966	\$14,623,988
Malbec	101	\$113,625	\$1,122	-0%	10	9%	112	\$125,110
Merlot	1,145	\$1,067,899	\$933	-32%	1,812	61%	2,957	\$2,757,737
Petit Verdot	7				72	91%	79	\$86,977
Pinot Noir	266	\$302,794	\$1,136	2%	682	72%	948	\$1,077,461
Sangiovese					67	100%	67	\$95,306
Shiraz	3,611	\$3,944,549	\$1,092	-29%	5,686	61%	9,297	\$10,156,475
Tempranillo	70						70	\$113,302
Red Total	9,586	\$10,503,080	\$1,096	-28%	16,916	64%	26,503	\$29,050,556
White								
Chardonnay	1,337	\$1,083,531	\$810	-19%	1,341	50%	2,678	\$2,170,124
Fiano	20						20	\$40,560
Pinot Gris/Grigio	298	\$346,102	\$1,163	-8%	1,861	86%	2,159	\$2,510,747
Prosecco	169						169	\$118,118
Riesling					109	100%	109	\$161,591
Sauvignon Blanc	337	\$267,712	\$794	0%	582	63%	919	\$729,843
Semillon					94	100%	94	\$94,572
Viognier					87	100%	87	\$121,288
White Total	2,161	\$1,856,022	\$859	-19%	4,074	65%	6,235	\$5,946,844
Grand Total	11,748	\$12,359,102	\$1,052	-24%	20,991	64%	32,738	\$34,997,400

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

Wrattenbully

Historical weighted average price vs tonnes crushed



Wrattenbully

Price dispersion – purchased grapes

	Tonnes purchased in each price segment					Total tonnes purchased
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera					7	7
Cabernet Sauvignon	407	422	2,526	951	73	4,379
Malbec			89	13		101
Merlot	173	370	602			1,145
Petit Verdot			7			7
Pinot Noir		68	199			266
Shiraz	610	567	1,444	868	122	3,611
Tempranillo				70		70
Red Total	1,191	1,426	4,867	1,901	202	9,586
White						
Chardonnay	113	847	367	10		1,337
Fiano					20	20
Pinot Gris/Grigio			277	21		298
Prosecco		169				169
Sauvignon Blanc		232	105			337
White Total	113	1,248	749	31	20	2,161
Total purchased	1,304	2,674	5,615	1,932	222	11,748

Wrattenbully

Current plantings by variety and year planted

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Cabernet Sauvignon	1,223	0	71	0	1,294	0%
Grenache	0	0	3	0	3	0%
Malbec	6	0	5	0	11	0%
Merlot	223	0	0	0	223	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	707	10	36	2	755	0%
Tempranillo	9	0	0	0	9	0%
Other Red	11	0	0	0	11	0%
Total red varieties	2,242	10	114	2	2,369	0%
White winegrapes						
Chardonnay	156	0	0	0	156	0%
Pinot Gris	99	0	0	0	99	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	59	0	0	0	59	0%
Semillon	3	0	0	0	3	0%
Other White	12	2	0	0	14	0%
Total white varieties	336	2	0	0	338	0%
Unknown variety	7	0	0	0	7	0%
Total all varieties	2,585	12	114	2	2,713	0%

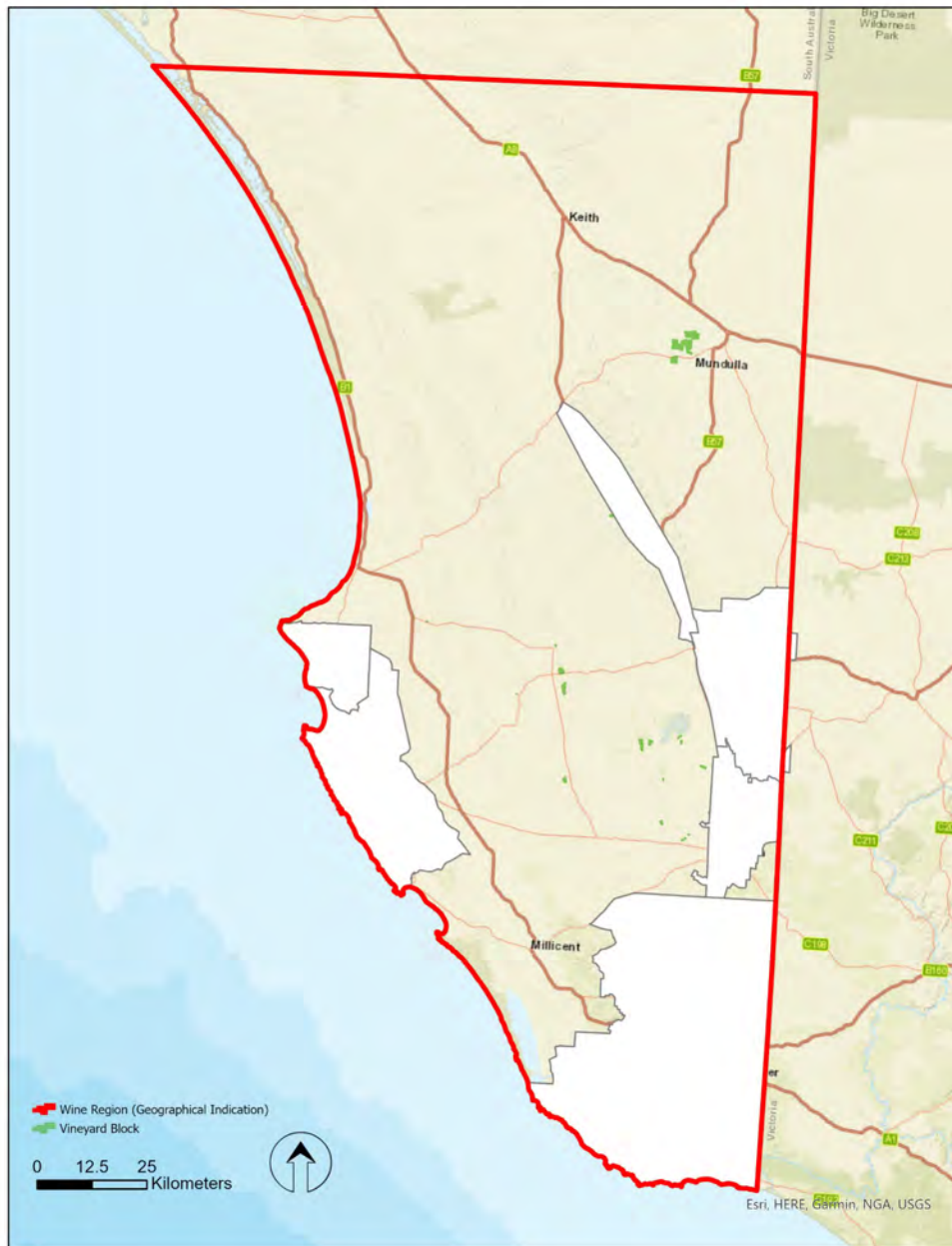
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2021

Regional Summary Report

Limestone Coast zone – other

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 06th July 2021
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

**Limestone Coast
Wine Zone**



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Limestone Coast zone – other

Winegrape intake summary table

Varieties	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								
Cabernet Franc	51				201	80%	251	\$215,256
Cabernet Sauvignon	2,230	\$1,920,654	\$861	-23%	4,193	65%	6,423	\$5,532,690
Lagrein	4				5	57%	9	\$10,142
Malbec	65				170	72%	235	\$183,204
Mataro/Mourvedre	313				369	54%	683	\$515,692
Merlot	671	\$524,015	\$782	-6%	1,672	71%	2,343	\$1,831,030
Montepulciano	7				5	42%	12	\$16,926
Petit Verdot	216				383	64%	599	\$422,392
Pinot Noir	128	\$203,604	\$1,590	21%	3	2%	131	\$208,333
Shiraz	2,469	\$2,281,717	\$924	-13%	2,586	51%	5,055	\$4,671,794
Tempranillo	6				17	74%	23	\$32,788
Other red	93	\$82,950	\$891	-5%			93	\$82,950
Red Total	6,253	\$5,518,880	\$883	-14%	9,606	61%	15,859	\$13,723,199
White								
Chardonnay	486	\$354,147	\$729	11%	1,270	72%	1,756	\$1,280,705
Pinot Gris/Grigio	130	\$125,506	\$962	0%			130	\$125,506
Prosecco	35						35	\$48,562
Sauvignon Blanc	16						16	\$10,368
Semillon	11						11	\$6,600
Verdelho					7	100%	7	\$7,382
White Total	678	\$545,182	\$804	6%	1,277	65%	1,955	\$1,479,123
Grand Total	6,931	\$6,064,062	\$875	-12%	10,883	61%	17,814	\$15,202,323

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 zone – other

Price dispersion – purchased grapes

	Tonnes purchased by price segment				Total tonnes purchased
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	
Red					
Cabernet Franc		51			51
Cabernet Sauvignon	169	1,318	733	10	2,230
Lagrein			4		4
Malbec		65			65
Mataro/Mourvedre		313			313
Merlot		640	31		671
Montepulciano			7		7
Petit Verdot		216			216
Pinot Noir		7	15	105	128
Shiraz		824	1,531	114	2,469
Tempranillo			6		6
Other red		51	42		93
Red Total	169	3,485	2,370	229	6,253
White					
Chardonnay		486			486
Pinot Gris/Grigio		26	105		130
Prosecco			14	21	35
Sauvignon Blanc		16			16
Semillon		11			11
White Total		538	119	21	678
Total purchased	169	4,023	2,489	250	6,931

Limestone Coast zone – other

Current plantings by variety and year planted

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Cabernet Franc	31	0	0	0	31	0%
Cabernet Sauvignon	752	0	0	0	752	0%
Merlot	264	0	0	0	264	0%
Petit Verdot	46	0	0	0	46	0%
Pinot Noir	11	0	0	0	11	0%
Shiraz	473	0	0	3	476	1%
Other Red	82	0	0	0	82	0%
Total red varieties	1,659	0	0	3	1,662	0%
White winegrapes						
Chardonnay	129	0	0	0	129	0%
Pinot Gris	13	0	0	0	13	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	17	0	0	0	17	0%
Semillon	7	0	0	0	7	0%
Other White	10	0	0	0	10	0%
Total white varieties	180	0	0	0	180	0%
Unknown	0	0	0	0	0	0%
Total all varieties	1,839	0	0	3	1,842	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 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 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 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 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 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, Coonawarra Vignerons (cover image of Rymill)

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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