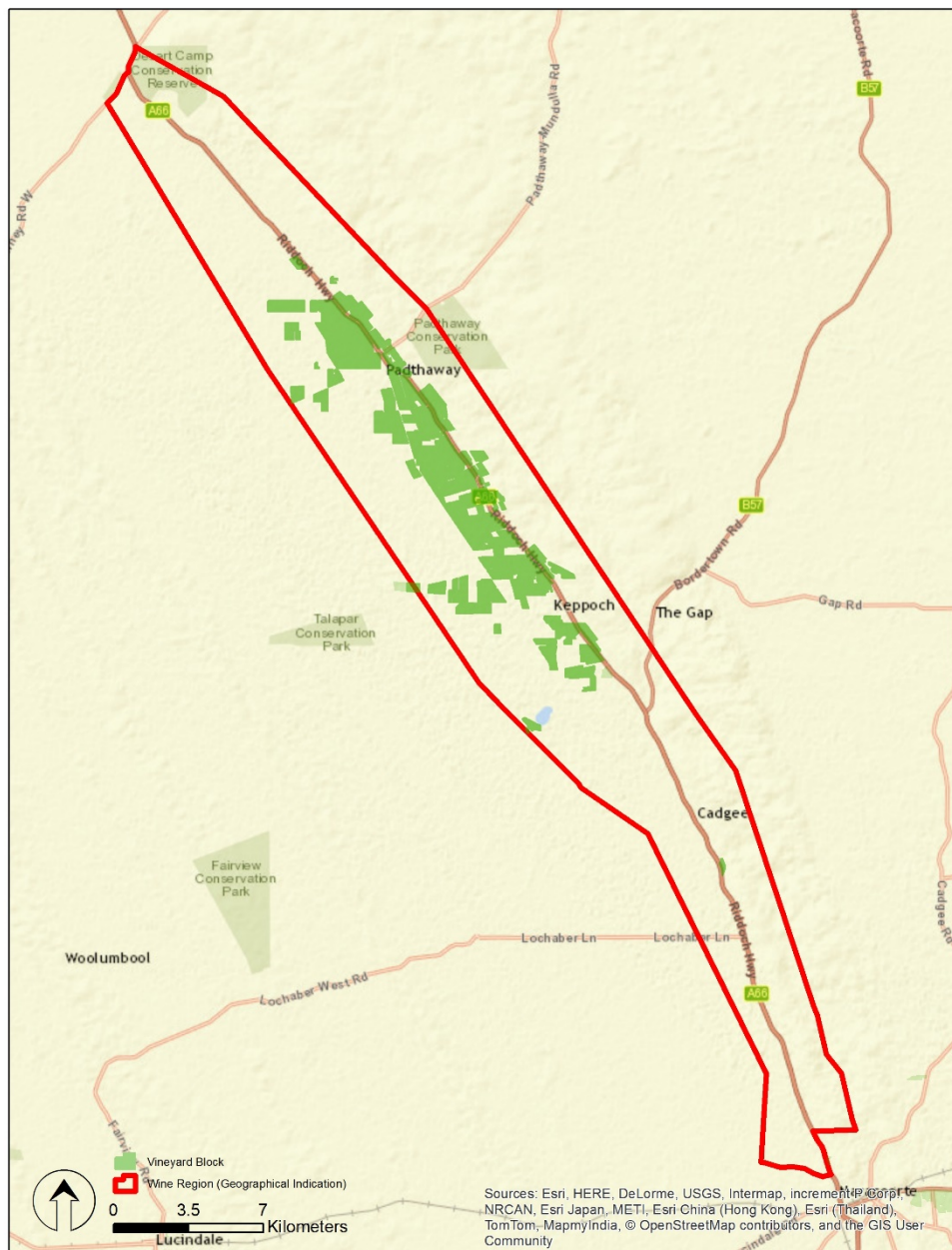


SA Winegrape Crush Survey 2020

Regional Summary Report

Padthaway Wine Region

Wine Australia July 2020



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

**Padthaway
Wine Region**



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Padthaway

Vintage overview

VINTAGE REPORT

It looked like we were getting off to a good start with below average but sufficient winter rainfall providing sound soil moisture levels. Then, on 17th September 2019 a severe frost damaged early vine growth with significant crop losses even with the extensive frost mitigation measures implemented along the Padthaway Valley in recent years to ward off climate related weather risks including frost damage.

Cool and windy weather followed during critical flowering, causing uneven fruit set and significantly smaller than average crops in many vineyards.

None-the-less, Padthaway was very fortunate not to be affected by the summer bushfires and smoke taint impacting many other Australian wine regions. Fruit prices were strong.

Despite the initial setbacks, and a heat spike pre-Christmas, thankfully the cool days and low night temperatures that followed for the ripening and harvest period allowed for ideal, slow flavour development with very little to no disease pressure.

Chardonnay for sparkling base was picked mid-February, with aromatic whites following towards the end of the month. Vintage concluded with Cabernet Sauvignon being picked in Mid-April.

The small quantities of high quality Padthaway fruit have produced white wines showing freshness, vibrancy, good natural acidity and flavour intensity. The reds have exceptional depth, concentration and complexity with ripe tannins, good structure and fruit sweetness.

All up, a challenging Vintage; but with exciting expectations for quality wine produced from consistently great Padthaway wine grapes.

Leisha Munro – President

Padthaway Wine Region

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Padthaway was 16,428 tonnes in 2020, down by 56 per cent compared with the 2019 reported crush of 37,215 tonnes. Over the past five years (up to 2019), the average crush for Padthaway has been 33,973 tonnes, making this year's crush 52 per cent below the five-year average. It was the lowest crush reported since figures were first collected for the region in 2000.

There were 21 respondents to the survey who reported crushing grapes from Padthaway in 2020, compared with 17 in 2019.

The total estimated value of winegrapes from Padthaway in 2020 was \$17.7 million compared with \$38.5 million in 2019.

There were increases in average prices for the three largest varieties: Shiraz up by 7 per cent to \$1430 per tonne, Chardonnay up 6 per cent to \$694 per tonne and Cabernet Sauvignon up by 1 per cent to \$1294 per tonne.

According to Vinehealth Australia data, the total vineyard area in Padthaway as at 30 April 2020 is 3959 hectares, compared with 3881 hectares in 2019 and around 140 hectares less than it was five years ago.

There were 76 hectares of new plantings (including top-working and replacements) in the 2019-20 planting season, the majority being Cabernet Sauvignon.

Padthaway

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	9			9						16	65%	25	\$25,350
Cabernet Sauvignon	2,226			1,901	297	29	\$2,880,622	\$1,294	1%	1,203	35%	3,430	\$4,437,410
Graciano										2	100%	2	\$3,585
Lagrein	2				2						0%	2	\$2,850
Malbec	53			53						146	73%	200	\$207,862
Merlot	286			286			\$255,593	\$895	12%	335	54%	621	\$555,706
Pinot Meunier										0	100%	0	\$906
Pinot Noir	483			480	3		\$541,290	\$1,122	32%	41	8%	524	\$587,406
Sangiovese	18					18					0%	18	\$40,342
Shiraz	2,475			1,669	504	302	\$3,539,941	\$1,430	7%	1,663	40%	4,138	\$5,917,598
Tempranillo	3					3				1	32%	5	\$11,600
Red total	5,555			4,398	806	352	\$7,333,026	\$1,320	6%	3,409	38%	8,964	\$11,790,615
White													
Chardonnay	2,820		303	2,517			\$1,957,276	\$694	6%	1,071	28%	3,890	\$2,700,654
Gewurztraminer	87			87						50	37%	137	\$88,940
Pinot Gris/Grigio	1,314			1,314			\$1,318,995	\$1,004	5%	102	7%	1,416	\$1,421,729
Riesling	497			497						467	48%	963	\$870,282
Sauvignon Blanc	774			774			\$650,880	\$841	3%	81	9%	855	\$718,966
Verdelho	28		28							103	79%	131	\$52,376
Vermentino										2	100%	2	\$3,380
Viognier	31			31						34	53%	65	\$65,110
Other white										5	100%	5	\$8,100
White total	5,549		330	5,219			\$4,474,305	\$806	8%	1,915	26%	7,465	\$5,929,538
Grand total	11,104		330	9,617	806	352	\$11,807,331	\$1,063	2%	5,324	32%	16,428	\$17,720,153

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

Padthaway

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 Franc	8	0	0	0	8	0%
Cabernet Sauvignon	914	68	67	52	1,101	5%
Malbec	78	0	0	0	78	0%
Merlot	169	0	0	0	169	0%
Pinot Noir	86	0	0	11	97	11%
Shiraz	1,157	31	26	13	1,227	1%
Other Red	10	0	0	0	10	0%
Total red varieties	2,422	99	93	76	2,690	3%
White winegrapes						
Chardonnay	773	0	0	0	773	0%
Pinot Gris	159	0	0	0	159	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	28	0	0	0	28	0%
Total white varieties	1,229	0	0	0	1,229	0%
Unknown variety	40	0	0	0	40	0%
Total all varieties	3,691	99	93	76	3,959	2%

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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