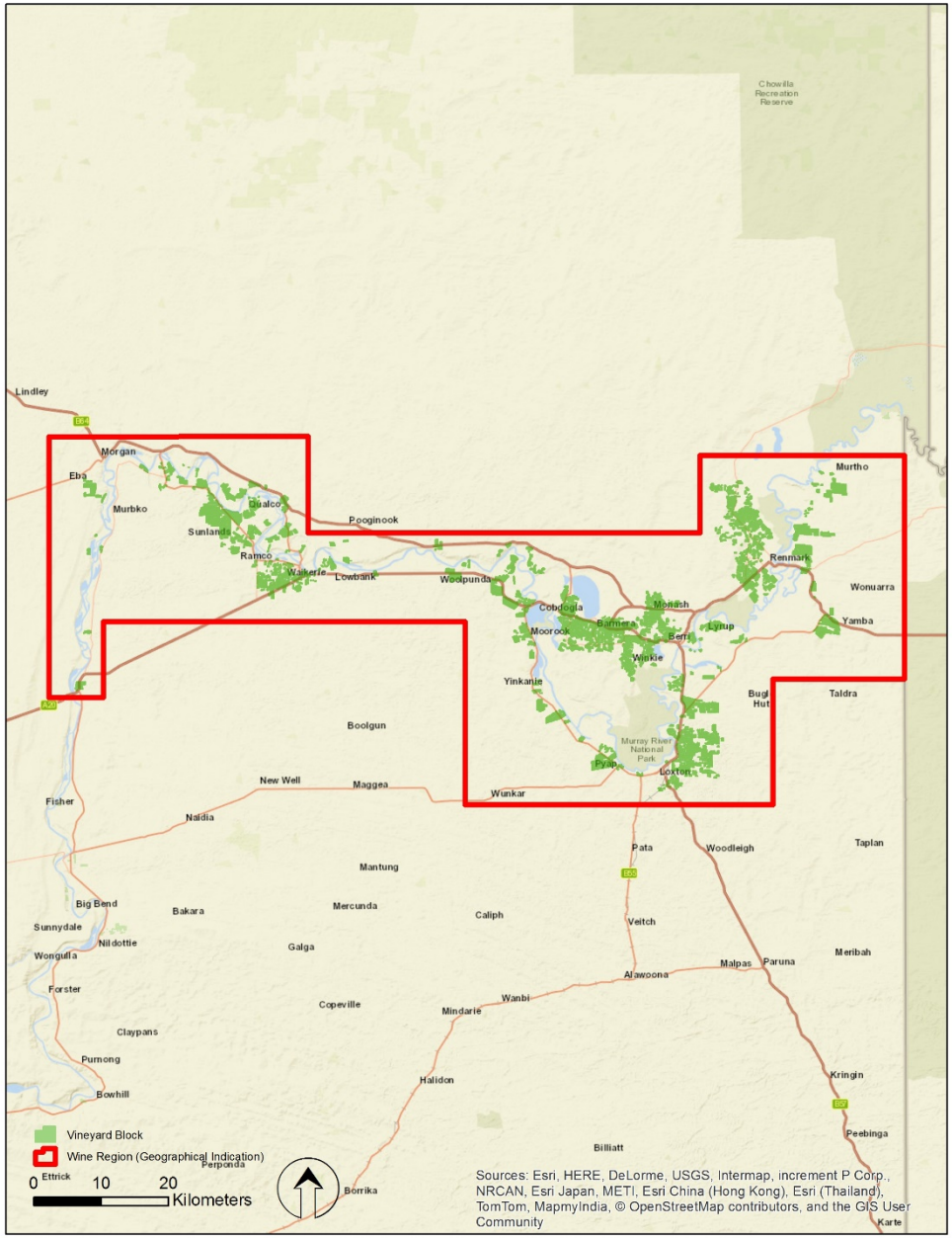


DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Riverland Wine Region

Vinehealth AUSTRALIA

SA Winegrape Crush Survey 2020

Regional Summary Report

Riverland Wine Region

Wine Australia July 2020

Riverland

Vintage overview

VINTAGE REPORT

The vintage of 2020 was one of the smallest for many years, with several factors contributing to the lower crop. The vintage period was relatively trouble-free but concluded what was a very challenging season for grape growers. The Riverland was not alone.

The first challenge was the very dry autumn and winter preceding the 2019/20 season. Only 80mm of rain fell from January 2019 to the start of the growing season in September 2019. These dry conditions required regular irrigation through the post-harvest period and winter months to maintain adequate moisture in the rootzone and leach accumulated salts.

Budburst occurred at close to the usual time. Early indications were for average to below average crop potential, based on the observed percentage bud burst, shoot fruitfulness and inflorescence size. The very dry conditions over the post-harvest period and winter months are likely have contributed to this early loss of potential.

The crop potential was further reduced by a widespread frost event soon after budburst for the early varieties. Chardonnay was the main variety affected. A second damaging meteorological event occurred on 4th November when a hailstorm cut a narrow swathe through the Riverland. The damage inside the main impact zone was severe, with total crop loss occurring on some vineyards. Hail damage assessments conducted immediately after the event estimated that about 15,000 tonnes of grapes had been lost.

The spring months were generally mild, with close to long term average temperatures. Spring was also very windy, with the winds usually accompanied by dust storms. The cool conditions were ended by a day of severe heat, hot northerly winds and a dust storm, causing significant crop loss in late flowering varieties with insufficient soil moisture loading prior to the heat.

December 2019 was the hottest in many years and turned out to be the hottest month of the season. The only heatwave event for the season occurred in late December, with the average maximum temperature of the last week being close to 41oC. During this month, growth stages advanced, and a harvest start in late January became likely. Veraison in early varieties and areas started in the Christmas/New Year period.

The temperatures of the harvest months of January to April were below the long-term average, and without the prolonged heatwave events of recent seasons.

The vintage started in late-January for the early table wine varieties, which has become the normal starting time in recent years. The vintage generally proceeded smoothly in the cooler than usual conditions, with wineries able to bring in grapes at optimal sugar levels for most of the vintage. Grape ripening occurred at manageable rates, and the vintage compression of recent vintages was not as evident this season. The reduced crop size also assisted with the smooth and timely intake of grapes. The rates of ripening for heavier crops and late varieties slowed from mid-March and the vintage finished in early-mid April.

The relatively cool ripening conditions leading up to and through the vintage have resulted in excellent wine quality, with wines showing good varietal character and the red varieties showing high colour density. Winemakers have praised grape growers for producing exceptional fruit quality under such difficult circumstances. While grape growers will remember the 2019/20 season for all its climatic challenges, winemakers are delighted with the outcome in wine quality terms, if not volume.

Ian Macrae, CCW

Riverland

Vintage overview

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from the Riverland was 461,385 tonnes in 2020, down by 3 per cent compared with the 2019 reported crush of 474,090 tonnes. Over the past five years (up to 2019), the average crush for the Riverland has been 460,460 tonnes, making this year's crush almost identical to the five-year average. The crush from the Riverland has been within 3 per cent of the average in each of the past five years, attesting to the consistency of its production despite varying seasonal conditions.

There were 66 respondents to the survey who reported crushing grapes from the Riverland in 2020, compared with 51 in 2019. It is likely that the increased number of respondents reflects the greater availability of fruit this season compared with other regions.

The total estimated value of winegrapes from the Riverland in 2020 was $255 million compared with $227 million in 2019. The slight decrease in production was more than offset by an overall increase in the average purchase value of grapes, which increased by 16 per cent from $472 per tonne in 2019 to $546 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up by 13 per cent to $697 per tonne, Chardonnay up 12 per cent to $402 per tonne and Cabernet Sauvignon up by 15 per cent to $698 per tonne.

The price dispersion data for reds shows an upward shift in purchase prices, with 94 per cent of red grapes purchased at $600 per tonne and above, compared with 72 per cent last year and almost none in 2018. Almost all whites (97 per cent) were purchased at between $300 and $600 per tonne.

According to Vinehealth Australia data, the total vineyard area in the Riverland as at 30 April 2020 is 20,575 hectares, compared with 20,366 hectares in 2019. There were 202 hectares of new plantings (including top-working and replacements) in the 2019-20 planting season, the vast majority being Shiraz.

Riverland

Winegrape intake summary table – red varieties

	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				
Barbera	19		7	12							0%	19	$12,117
Cabernet Franc	4		4							1	16%	5	$2,609
Cabernet Sauvignon	54,429		30	54,355		44	$37,968,075	$698	15%	19,310	26%	73,739	$51,437,889
Durif	740			738	2		$555,674	$751	10%	403	35%	1,143	$857,910
Graciano	22		4	18			$20,065	$904	23%		0%	22	$20,065
Grenache	3,745		348	3,370	27		$2,410,137	$643	25%	180	5%	3,926	$2,526,039
Lagrein	17		5	7	5		$21,389	$1,234	55%	18	51%	35	$43,464
Malbec	184		22	162						323	64%	507	$302,819
Mataro/Mourvedre	1,977		10	1,931	36		$1,333,106	$674	33%	110	5%	2,087	$1,406,991
Merlot	17,487		32	17,455			$11,486,192	$657	10%	10,699	38%	28,186	$18,513,647
Montepulciano	82		46	36			$63,350	$776	35%	24	23%	106	$82,344
Muscat a petits grains rouges	228		104	124					-100%		0%	228	$134,928
Nebbiolo	9		1	8							0%	9	$6,003
Nero d'Avola	4			3	2				-100%		0%	4	$5,531
Petit Verdot	6,703		3,877	2,827			$3,970,087	$592	18%	6,525	49%	13,229	$7,834,583
Pinot Noir	6,189		4,233	1,957			$3,885,431	$628	27%	980	14%	7,169	$4,500,577
Ruby Cabernet	1,067		386	681			$623,032	$584	14%	1,270	54%	2,337	$1,364,512
Sangiovese	52		36	16						516	91%	567	$324,460
Shiraz	89,555		636	88,916	4		$62,460,647	$697	13%	30,085	25%	119,641	$83,443,857
Tempranillo	834		350	483			$543,166	$651	20%	485	37%	1,319	$859,104
Touriga Nacional	37		35	2			$21,812	$585		94	72%	131	$76,601
Other red	1,482		245	1,231	6		$965,147	$651	22%	3,646	71%	5,128	$3,339,014
Red total	**184,868**		**10,410**	**174,331**	**82**	**44**	**$126,627,420**	**$685**	**15%**	**74,668**	**29%**	**259,536**	**$177,095,063**

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

Riverland

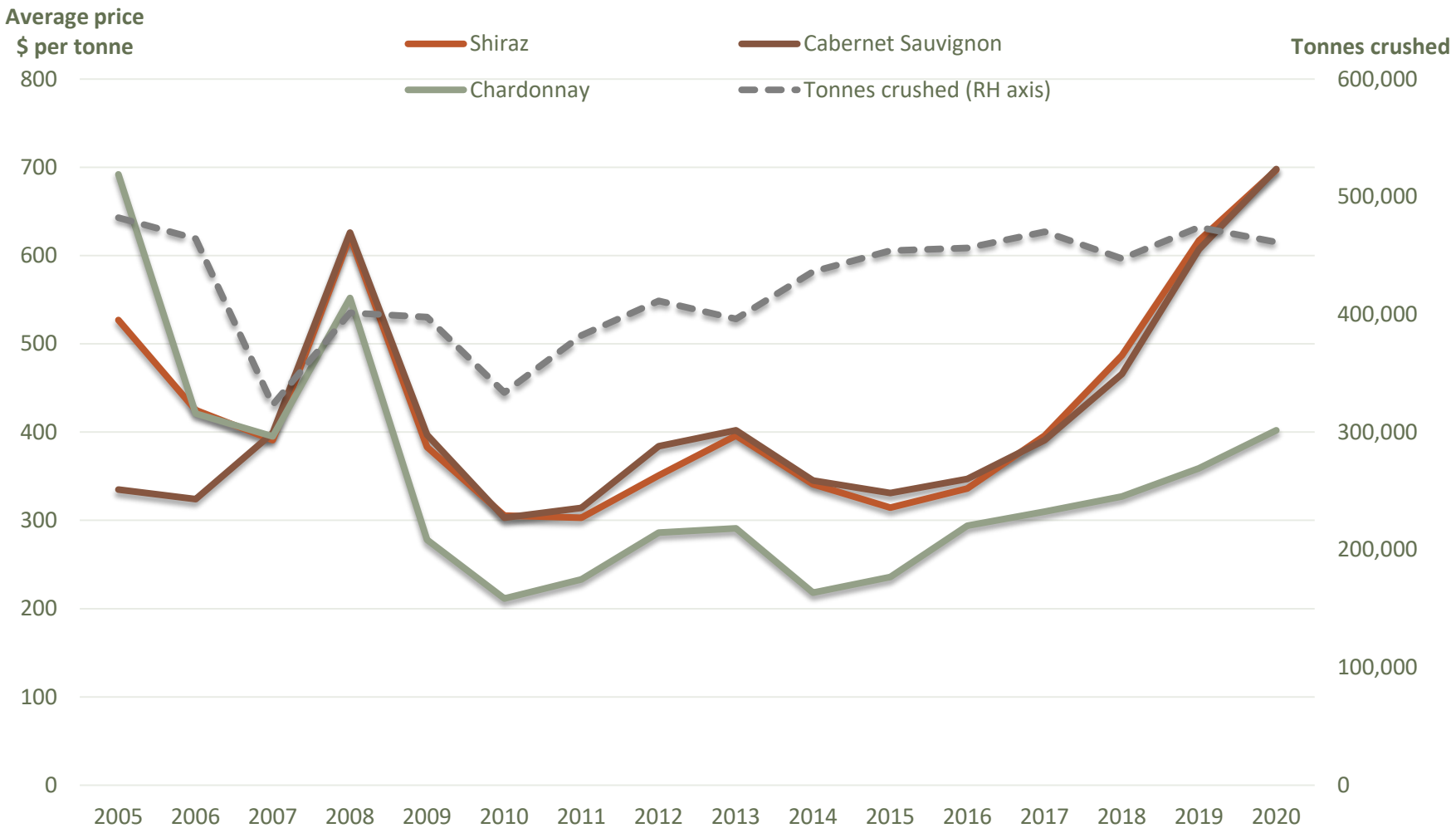
Winegrape intake summary table – white varieties

	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+							
White													
Chardonnay	82,867		82,208	659			$33,336,544	$402	12%	20,510	20%	103,377	$41,587,489
Chenin blanc	1,446	558	889				$447,939	$310	18%		0%	1,446	$447,939
Colombard	20,453	1,236	19,217				$6,214,434	$304	16%	3,592	15%	24,045	$7,305,848
Fiano	184		174	7	3		$107,551	$584	19%		0%	184	$107,551
Gewurztraminer	920		920				$347,116	$377	3%	1,248	58%	2,168	$818,238
Gruner Veltliner	3		1	0	2		$3,425	$1,088		134	98%	137	$148,735
Marsanne	6			6							0%	6	$5,088
Muscat a petits grains blancs	3,225	127	3,097				$1,092,408	$339	11%	607	16%	3,831	$1,297,983
Muscat Gordo Blanco	19,073	421	18,653				$6,008,133	$315	22%	3,683	16%	22,756	$7,168,324
Pinot Gris/Grigio	5,059		4,880	179			$2,657,621	$525	4%	1,284	20%	6,343	$3,332,239
Prosecco	112			112							0%	112	$107,038
Riesling	1,645		1,645				$545,890	$332	-2%	555	25%	2,200	$730,066
Roussanne	4		4								0%	4	$1,200
Sauvignon Blanc	16,238	25	16,069	145			$7,479,882	$461	8%	4,465	22%	20,703	$9,536,759
Semillon	3,979	322	3,657				$1,331,719	$335	13%	4,773	55%	8,752	$2,929,212
Verdelho	884	79	805				$279,925	$317	6%	754	46%	1,639	$518,762
Vermentino	447		236	211			$248,147	$555	31%	190	30%	637	$353,334
Viognier	1,558	468	884	204	2		$679,620	$436	8%	546	26%	2,104	$917,989
Other white	1,115	1	1,079	31	4		$411,060	$369	26%	289	21%	1,404	$517,618
White total	**159,219**	**3,236**	**154,417**	**1,554**	**11**		**$61,304,740**	**$385**	**14%**	**42,631**	**21%**	**201,850**	**$77,831,411**
Grand total	**344,087**	**3,236**	**164,827**	**175,886**	**93**	**44**	**$187,932,160**	**$546**	**16%**	**117,299**	**25%**	**461,385**	**$254,926,475**

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

Riverland

Historical weighted average price vs tonnes crushed



Riverland

Current plantings by variety and year planted – white varieties

Variety	*Pre-2017*	*2017*	*2018*	*2019*	*Total area*	*% planted in 2019*
White winegrapes						
Chardonnay	4,313	0	23	3	4,339	0%
Chenin Blanc	70	0	0	0	70	0%
Colombard	753	0	0	0	753	0%
Doradillo	35	0	0	0	35	0%
Muscadelle (Tokay)	8	0	0	0	8	0%
Muscat A Petit Grains Blanc (White Frontignac)	113	0	0	0	113	0%
Muscat Gordo Blanco	874	2	0	0	876	0%
Palomino	8	0	0	0	8	0%
Pinot Gris	161	42	47	0	250	0%
Riesling	110	0	0	0	110	0%
Sauvignon Blanc	514	16	10	4	544	1%
Semillon	309	0	0	0	309	0%
Sultana	124	0	0	0	124	0%
Traminer (Gewurztraminer)	110	0	0	0	110	0%
Trebbiano	14	0	0	0	14	0%
Verdelho	86	0	0	0	86	0%
Vermentino	16	0	0	0	16	0%
Viognier	103	0	0	0	103	0%
Other White	62	0	0	0	62	0%
Total white varieties	**7,783**	**60**	**80**	**7**	**7,930**	**0%**

Source: Vinehealth Australia

Riverland

Current plantings by variety and year planted – red varieties

Variety	*Pre-2017*	*2017*	*2018*	*2019*	*Total area*	*% planted in 2019*
Red winegrapes						
Cabernet Sauvignon	3,236	44	78	12	3,370	0%
Grenache	287	6	0	1	294	0%
Malbec	26	3	1	0	30	0%
Mataro (Mourvedre)	230	0	2	0	232	0%
Merlot	1,165	4	21	0	1,190	0%
Petit Verdot	494	2	0	0	496	0%
Pinot Noir	287	0	3	1	291	0%
Ruby Cabernet	119	0	0	0	119	0%
Sangiovese	14	4	0	4	22	18%
Shiraz	5,450	76	51	172	5,749	3%
Tempranillo	53	0	1	0	54	0%
Other Red	132	13	8	5	158	3%
Total red varieties	**11,493**	**152**	**165**	**195**	**12,005**	**2%**
Unknown variety	292	81	86	0	459	0%
Rootstock Block	25	0	2	0	27	0%
Table grapes - red	18	0	0	0	18	0%
Table grapes - white	26	4	16	0	46	0%
Multi-purpose red	60	0	0	0	60	0%
Multi-purpose white	25	0	5	0	30	0%
Total all varieties	**19,722**	**297**	**354**	**202**	**20,575**	**1%**

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 receival – 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.

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- 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

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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