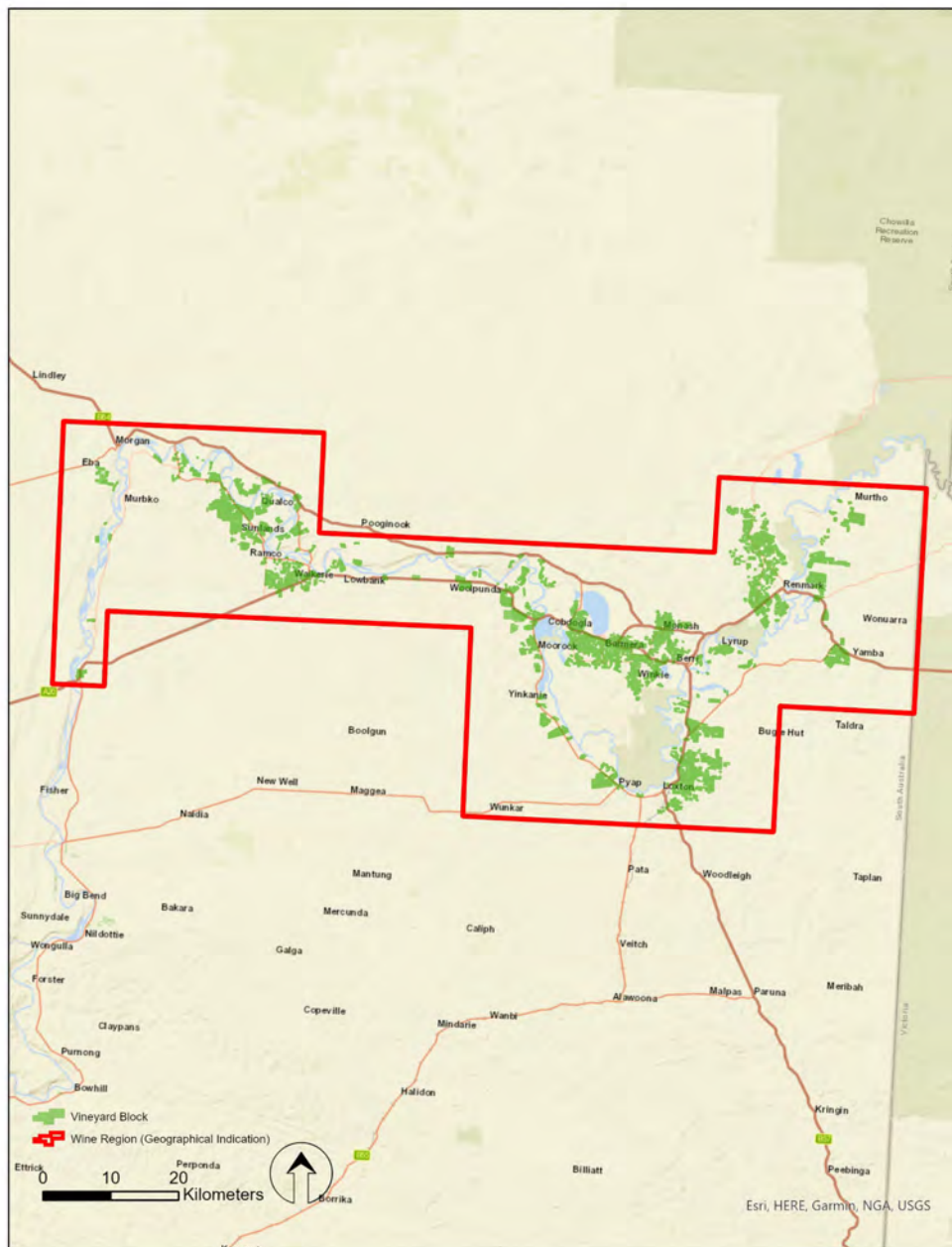


SA Winegrape Crush Survey 2021

Regional Summary Report

Riverland Wine Region

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 1st June 2021
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Riverland Wine Region



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Riverland

Vintage overview

VINTAGE REPORT

The 2020 growing season was almost perfect in the Riverland region, with some describing it as a 'unicorn' vintage, a once in a lifetime event of near textbook conditions.

Rainfall returned to long-term average levels, with approximately 233mm across the growing season from January to October, producing favourable growing conditions. Budburst was uniform and moderate weather allowed for good fruitset, showing a potential for average to above average yields. There was some frost during May to September; however, weather during veraison was relatively dry so disease pressure was very low to non-existent.

A comparatively mild Riverland summer was brushed with only two minor rain events at 5mm each; this coupled with very few hot days and no drawn-out heatwaves, as experienced in previous years, led to a very positive harvest.

The harvest was underway by mid-January with early white and sparkling varieties making their way through the crushers. There was a period during harvest, due to the mild conditions, that Baumes did not move as expected, and in some cases, went backwards for some fruit. The cooler than usual conditions also facilitated a smooth intake of grapes with most varieties brought in at optimal sugar levels.

This contributed to an efficient vintage, with yield across the region reported as average to high, some experiencing their best crop yield in many years.

These 'unicorn' conditions with good rainfall and relatively cool weather 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.

*Jo Pippas, General Manager
Riverland Wine*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from the Riverland was 558,252 tonnes in 2021, up 21 per cent compared with the 2020 crush of 461,385 tonnes. The crush was the largest ever recorded, and more than 70,000 tonnes above the previous highest recorded crush of 482,214 tonnes in 2005.

Over the past five years (up to 2020), the average crush for the Riverland has been 461,900 tonnes.

There were 62 respondents to the survey who reported crushing grapes from the Riverland in 2021, compared with 66 in 2020.

The total estimated value of winegrapes from the Riverland in 2021 was just under \$273 million compared with \$255 million in 2020, an increase of 7 per cent. The increase in production was partly offset by an overall decrease in the average purchase value of grapes, which decreased by 11 per cent from \$546 per tonne in 2020 to \$486 per tonne.

There were decreases in average prices for all the major reds except Pinot Noir, which was up 10 per cent to \$688 per tonne. Shiraz was down 21 per cent to \$552 per tonne, Cabernet Sauvignon down 23 per cent to \$539 per tonne and Merlot down 20 per cent to \$528 per tonne. Conversely, all the major whites increased in average value; Chardonnay up 8 per cent to \$435 per tonne, Sauvignon Blanc up 6 per cent to \$490 per tonne and Pinot Gris/Grigio up 3 per cent to \$542 per tonne.

The price dispersion data for reds shows a substantial downward shift, with only 10 per cent purchased at \$600+, compared with 94 per cent in 2020.

According to Vinehealth Australia data, the total vineyard area in the Riverland as at 30 April 2021 was 20,492 hectares, compared with 20,575 hectares in 2020 and 20,608 in 2016. There were 77 hectares of new plantings (including top-working and replacements) in the 2020-21 planting season, compared with 231 hectares the previous year.

Riverland

Winegrape intake summary table – reds

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	43	\$27,246	\$634	0%			43	\$27,246
Cabernet Franc	7						7	\$3,250
Cabernet Sauvignon	66,343	\$35,729,362	\$539	-23%	19,244	22%	85,587	\$46,093,008
Durif	735	\$431,095	\$587	-22%	670	48%	1,405	\$823,951
Graciano	8				0	3%	8	\$3,850
Grenache	4,743	\$3,040,165	\$641	-0%	692	13%	5,434	\$3,483,442
Lagrein	31	\$19,818	\$630	-49%			31	\$19,818
Malbec	166				273	62%	440	\$239,528
Mataro/Mourvedre	2,918	\$1,532,328	\$525	-22%	528	15%	3,446	\$1,809,428
Merlot	21,054	\$11,113,377	\$528	-20%	9,424	31%	30,479	\$16,087,822
Montepulciano	153	\$106,781	\$696	-10%	52	25%	205	\$142,852
Muscat à petits grains rouges	210	\$112,909	\$537	0%	2	1%	212	\$113,715
Nebbiolo	5						5	\$2,250
Nero d'Avola	6						6	\$7,500
Petit Verdot	9,441	\$4,654,993	\$493	-17%	5,790	38%	15,231	\$7,509,823
Pinot Noir	8,195	\$5,637,489	\$688	10%	944	10%	9,140	\$6,287,206
Ruby Cabernet	1,303	\$658,018	\$505	-13%	1,120	46%	2,423	\$1,223,713
Sangiovese	110	\$54,885	\$499	0%	637	85%	747	\$372,925
Shiraz	121,676	\$67,160,684	\$552	-21%	33,795	22%	155,470	\$85,814,401
Tempranillo	643	\$390,888	\$608	-7%	410	39%	1,052	\$639,993
Touriga Nacional	44				126	74%	170	\$85,230
Other red	1,613	\$851,852	\$527	-19%	6,643	80%	8,257	\$4,594,690
Red Total	239,447	\$131,651,348	\$550	-20%	80,349	25%	319,796	\$175,385,640

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

Riverland

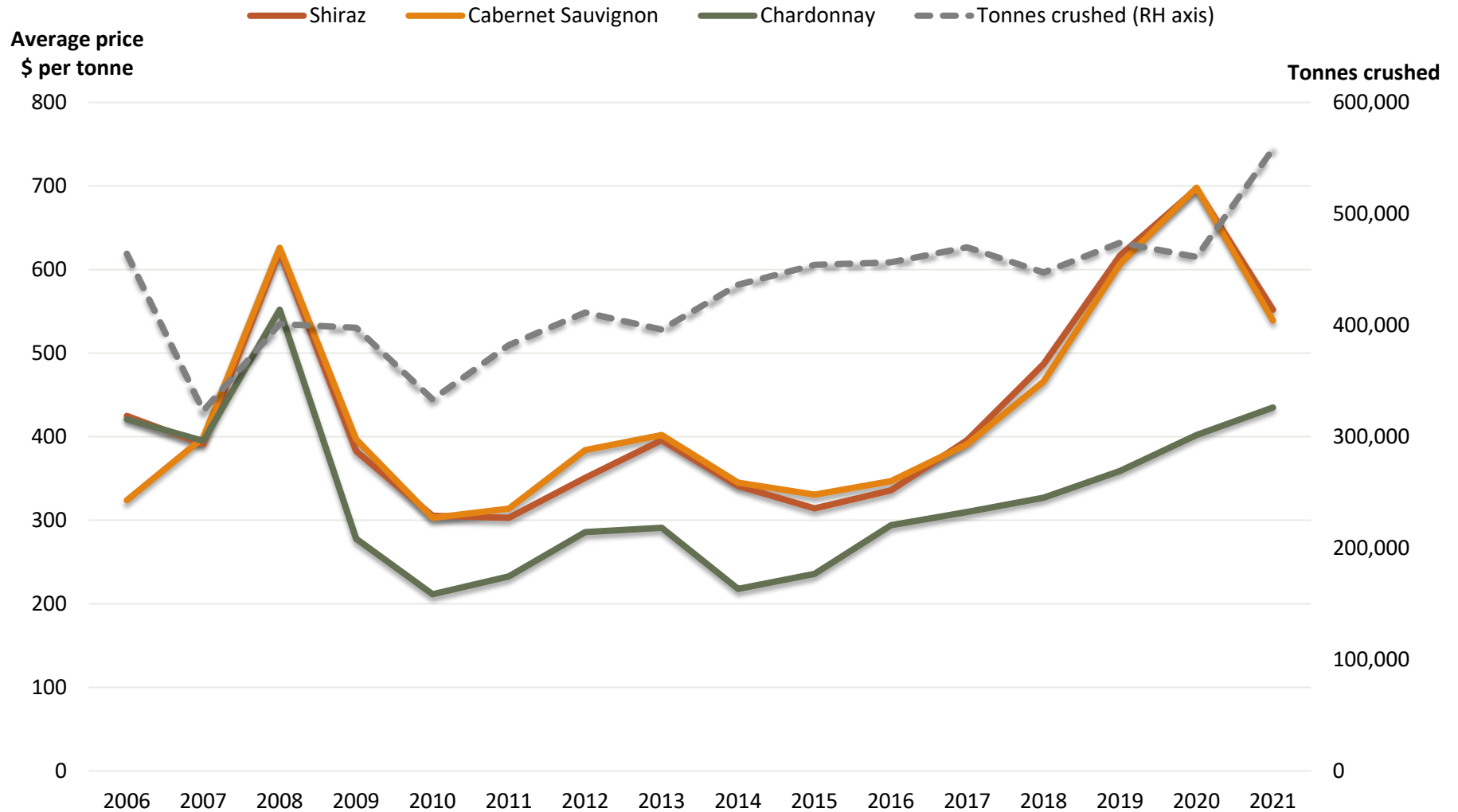
Winegrape intake summary table – whites

Varieties	Tonnes purchased	Average		% change in average value	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Total value all grapes
		Total value purchased	purchase value per tonne					
White								
Chardonnay	105,138	\$45,702,836	\$435	8%	22,867	18%	128,005	\$55,642,979
Chenin blanc	1,679	\$568,860	\$339	9%			1,679	\$568,860
Colombard	24,244	\$7,640,590	\$315	4%	3,095	11%	27,339	\$8,615,995
Fiano	162	\$99,703	\$617	6%			162	\$99,703
Gewürztraminer	952	\$371,519	\$390	3%	617	39%	1,569	\$612,528
Grüner Veltliner	3				105	97%	108	\$33,634
Marsanne	4						4	\$3,200
Muscat à petits grains blancs	3,337	\$1,113,897	\$334	-1%	550	14%	3,887	\$1,297,667
Muscat Gordo Blanco	24,528	\$7,618,083	\$311	-1%	4,336	15%	28,864	\$8,964,833
Pinot Gris/Grigio	6,890	\$3,731,813	\$542	3%	2,199	24%	9,088	\$4,922,525
Prosecco	186						186	\$162,516
Riesling	1,400	\$478,880	\$342	3%	442	24%	1,842	\$630,213
Roussanne	4						4	\$1,348
Sauvignon Blanc	16,944	\$8,297,836	\$490	6%	3,935	19%	20,879	\$10,225,036
Semillon	5,191	\$1,821,567	\$351	5%	4,435	46%	9,626	\$3,377,685
Verdelho	1,012	\$329,085	\$325	3%	636	39%	1,648	\$535,802
Vermentino	443	\$255,699	\$578	4%	172	28%	614	\$355,011
Viognier	1,678	\$748,846	\$446	2%	320	16%	1,998	\$891,747
Other white	760	\$291,566	\$384	4%	192	20%	952	\$460,655
White Total	194,554	\$79,238,778	\$407	6%	43,901	18%	238,456	\$97,401,935
Grand Total	434,002	\$210,890,126	\$486	-11%	124,250	22%	558,252	\$272,787,575

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

Price dispersion – purchased grapes (reds)

Varieties	Tonnes purchased in each price segment				Total tonnes purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	
Red					
Barbera	32		11		43
Cabernet Franc	7				7
Cabernet Sauvignon	64,203	1,930	210		66,343
Durif	291	421	23		735
Graciano	8				8
Grenache	208	4,327	203	5	4,743
Lagrein	21		11		31
Malbec	166				166
Mataro/Mourvedre	2,330	535	52		2,918
Merlot	20,787	267			21,054
Montepulciano	83	18	53		153
Muscat à petits grains rouges	210				210
Nebbiolo	5				5
Nero d'Avola			6		6
Petit Verdot	9,128	255	59		9,441
Pinot Noir		7,710	485		8,195
Ruby Cabernet	1,241	62			1,303
Sangiovese	110				110
Shiraz	113,931	6,921	824		121,676
Tempranillo	493		150		643
Touriga Nacional	44				44
Other red	1,356	239	14	2	1,611
Red Total	214,652	22,686	2,101	7	239,445

Riverland

Price dispersion – purchased grapes (whites)

Varieties	Tonnes purchased in each price segment				Total tonnes purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	
White					
Chardonnay	104,211	868	59		105,138
Chenin blanc	1,679				1,679
Colombard	24,244				24,244
Fiano	152		5	5	162
Gewürztraminer	952				952
Grüner Veltliner	3				3
Marsanne		4			4
Muscat à petits grains blancs	3,337				3,337
Muscat Gordo Blanco	24,528				24,528
Pinot Gris/Grigio	6,347	528	15		6,890
Prosecco		134	52		186
Riesling	1,400				1,400
Roussanne	4				4
Sauvignon Blanc	15,947	997			16,944
Semillon	5,065	126			5,191
Verdelho	1,012				1,012
Vermentino	181	253	9		443
Viognier	1,465	71	142		1,678
Other white	729		28	3	760
White Total	191,255	2,982	309	8	194,554
Total purchased	405,907	25,668	2,410	15	433,999

Riverland

Current plantings by variety and year planted – reds

Variety	Pre-2018	2018	2019	2020	Total area in 2020	% planted
Red winegrapes						
Barbera	2	0	0	0	2	0%
Cabernet Franc	1	0	0	0	1	0%
Cabernet Sauvignon	3,263	79	15	14	3,371	0%
Durif (Petite Sirah)	31	4	0	0	35	0%
Grenache	288	0	1	0	289	0%
Malbec	26	1	0	0	27	0%
Mataro (Mourvedre)	226	2	0	0	228	0%
Merlot	1,166	25	12	1	1,204	0%
Montepulciano	5	1	0	0	6	0%
Muscat A Petit Grains Rouge	2	0	0	0	2	0%
Pedro Ximenez	4	0	0	0	4	0%
Petit Verdot	495	0	0	0	495	0%
Pinot Noir	287	3	1	2	293	1%
Ruby Cabernet	119	0	0	1	120	1%
Sangiovese	17	0	4	0	21	0%
Saperavi	3	0	0	0	3	0%
Shiraz	5,522	57	123	53	5,755	1%
Tempranillo	53	1	0	0	54	0%
Touriga	6	0	0	0	6	0%
Other Red	89	3	5	2	99	2%
Total red varieties	11,605	176	161	73	12,015	1%

Source:
Vinehealth
Australia

Riverland

Current plantings by variety and year planted – whites and other

Variety	Pre-2018	2018	2019	2020	Total area in 2020	% planted
White winegrapes						
Chardonnay	4,261	24	3	2	4,290	0%
Chenin Blanc	74	0	0	0	74	0%
Colombard	726	0	0	0	726	0%
Doradillo	34	0	0	0	34	0%
Fiano	9	0	0	0	9	0%
Muscadelle (Tokay)	8	0	0	0	8	0%
Muscat A Petit Grains Blanc (White Frontignac)	102	0	0	0	102	0%
Muscat Gordo Blanco	849	0	0	0	849	0%
Palomino	8	0	0	0	8	0%
Pinot Gris	203	48	1	0	252	0%
Riesling	92	0	0	0	92	0%
Sauvignon Blanc	529	12	5	2	548	0%
Savagnin	8	0	0	0	8	0%
Semillon	302	0	0	0	302	0%
Sultana	121	0	0	0	121	0%
Traminer (Gewurztraminer)	92	0	0	0	92	0%
Trebbiano	13	0	0	0	13	0%
Verdelho	85	0	0	0	85	0%
Vermentino	16	0	0	0	16	0%
Viognier	103	0	0	0	103	0%
Other White	40	0	0	0	40	0%
Total white varieties	7,675	84	9	4	7,772	0%
Unknown variety	367	86	61	0	514	0%
Rootstock Block	25	2	0	0	27	0%
Table grapes - red	27	0	0	0	27	0%
Table grapes - white	34	16	0	0	49	0%
Multi-purpose red	58	0	0	0	58	0%
Multi-purpose white	24	5	0	0	29	0%
Total all varieties	19,815	369	231	77	20,492	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

GI maps – Vinehealth Australia

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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