Prepared by:

Wine Australia

On behalf of:

SOUTH AUSTRALIAN WINE INDUSTRY ASSOCIATION INCORPORATED

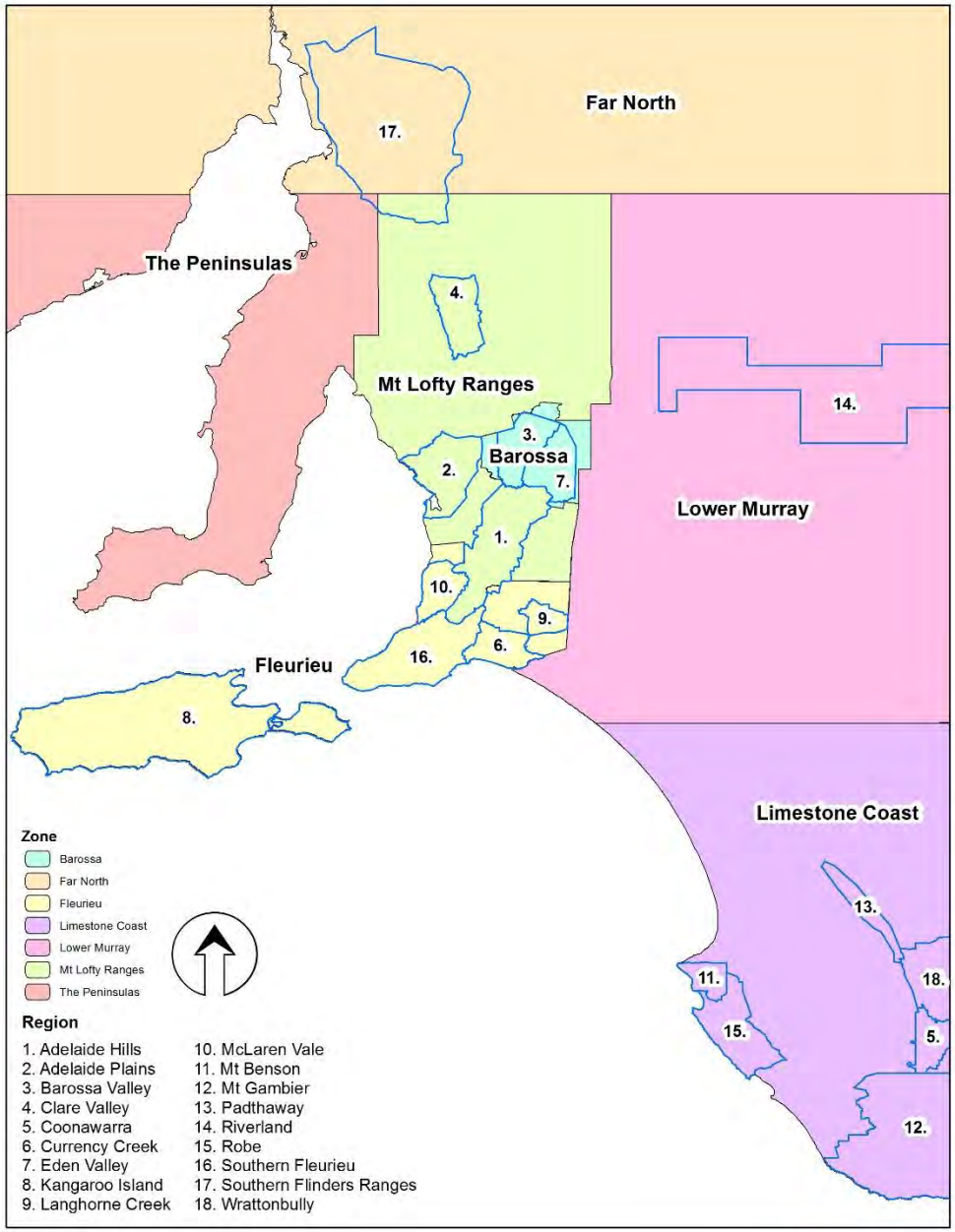
Wine Grape Council South Australia

Government of South Australia
Primary Industries and Regions SA

2018 SA Winegrape Crush Survey

August 2018

Contents



SCALE: 1:2,500,000
DATUM: GDA94
PROJECTION: Transverse Mercator
DATE: 16th August 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Wine Regions - Wine Australia

Geographical Indication Zones and Regions in South Australia

Vinehealth AUSTRALIA

2018 SA Winegrape Crush Survey

State Summary Report

Wine Australia August 2018

State summary 2018

Overview of vintage statistics

State and regional overview

The total reported crush of South Australian winegrapes in 2018 was 747,361 tonnes. This was a decrease of 13 per cent compared with the above-average 2017 reported crush of 863,279 tonnes. The crush was just above the 10-year average (2008-2017) of 739,572 tonnes.

Nationally, there was an estimated non-response rate of 15 per cent; however a specific non-response rate for South Australia is not known.

The top three regions by volume in 2018 were the Riverland with 60 per cent of the crush (447,410 tonnes), Barossa Valley including Barossa zone other with 8 per cent (56,970 tonnes) and Langhorne Creek with 6 per cent (44,695 tonnes). Most regions had reported decreases in tonnes crushed, including the Barossa Valley (down 21 per cent), Langhorne Creek (down 24 per cent), McLaren Vale (down 19 per cent) and Clare Valley (down 17 per cent). Regions in the Limestone Coast incurred particularly large reductions, with Wrattonbully down 52 per cent and Padthaway down 48 per cent.

The Riverland was relatively unaffected – down only 5 per cent - resulting in it increasing its share of the state's total crush from 54 to 60 per cent.

The total estimated value of the crush was just under $590 million in 2018 compared with $658 million in 2017, reflecting the decrease in tonnes partially offset by an increase in the average purchase value per tonne, which increased across the state by 4 per cent from $680 in 2017 to $710 per tonne in 2018.

Looking at the top variety in each region, weighted average prices decreased slightly for Barossa Shiraz and Adelaide Hills Sauvignon Blanc, but increased for McLaren Vale Shiraz, Clare Riesling, Riverland Chardonnay, Langhorne Creek Cabernet Sauvignon and particularly Coonawarra Cabernet Sauvignon which reached its highest value since 2003.

Varietal overview

The red crush was 452,324 tonnes, which was 18 per cent lower than the 2017 crush (549,233 tonnes) but only four per cent below the five-year average (470,156 tonnes). White varieties decreased by 6 per cent to 295,037 tonnes, which was very similar to the five-year average (300,192 tonnes).

There were decreased tonnes crushed for all the major red varieties with Shiraz down more than 50,000 tonnes (20 per cent) to 220,795 tonnes, Cabernet Sauvignon down 17 per cent to 130,762 tonnes and Merlot down 18 per cent to 40,586 tonnes.

Against the general trend, Chardonnay increased by 2 per cent (3,000 tonnes) to 155,002 tonnes, while the other largest varieties all decreased: Sauvignon Blanc down 20 per cent, Colombard down 8 per cent and Muscat Gordo Blanco down 19 per cent. However, Chardonnay had declined by 9 per cent in 2017 when most other white varieties increased.

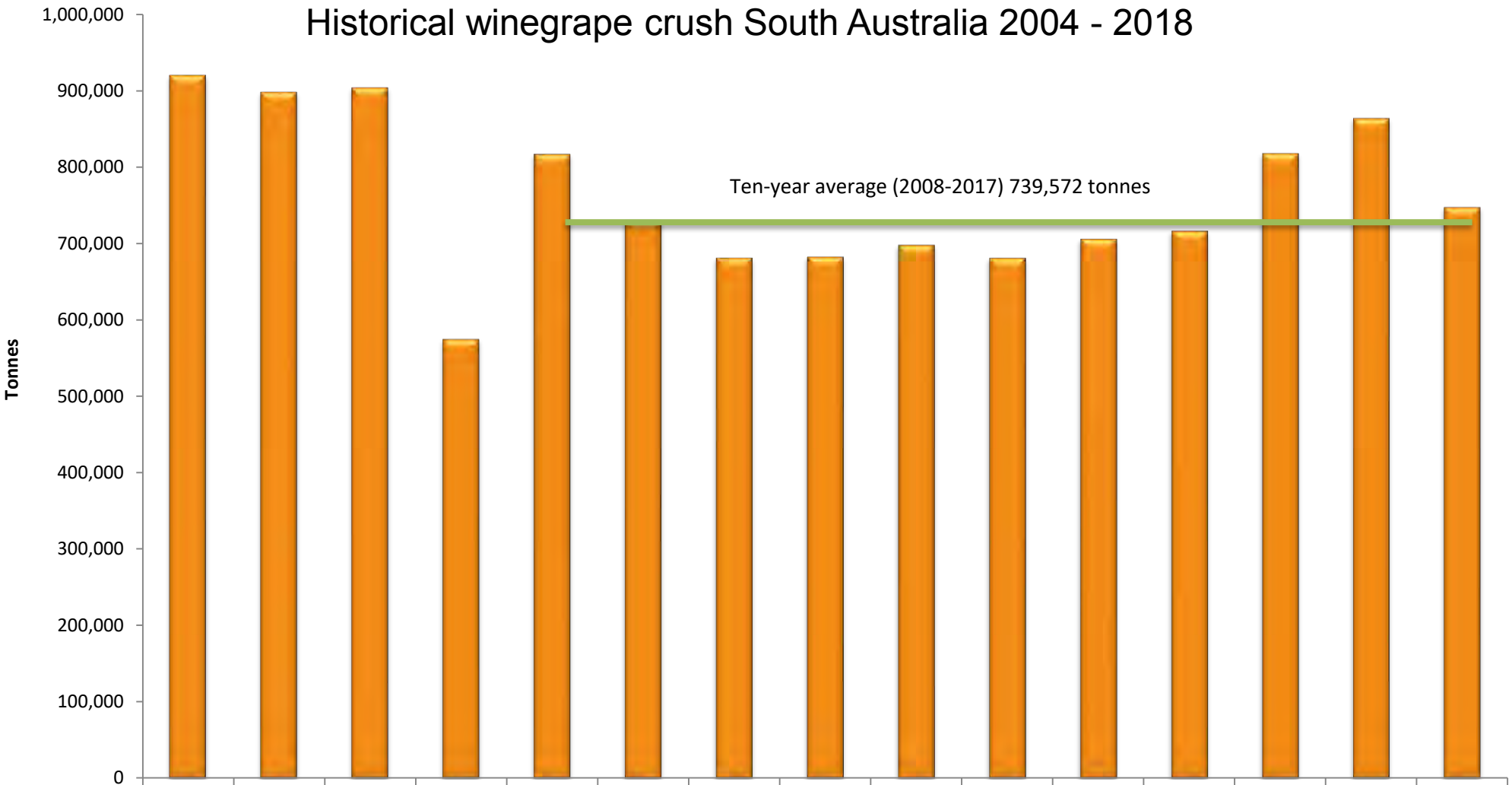
Vineyard plantings

Planting data derived from the Vinehealth Australia vineyard register shows that there were 75,566 hectares planted to vines in South Australia as at 30 April 2018. This represents a very small net decrease of 59 hectares in the last 12 months. Although there have been net decreases in each of the past five years, the current area planted is 6,000 hectares higher than it was in 2004.

There was a total of 410 hectares (<1 per cent of the total area) planted in spring 2017 (including top-working and replacements) with over 85 per cent of new plantings being red varieties.

There were 3,326 vineyard owners registered with Vinehealth Australia as at 30 April 2018. This was slightly fewer than at the same time last year.

State summary 2018

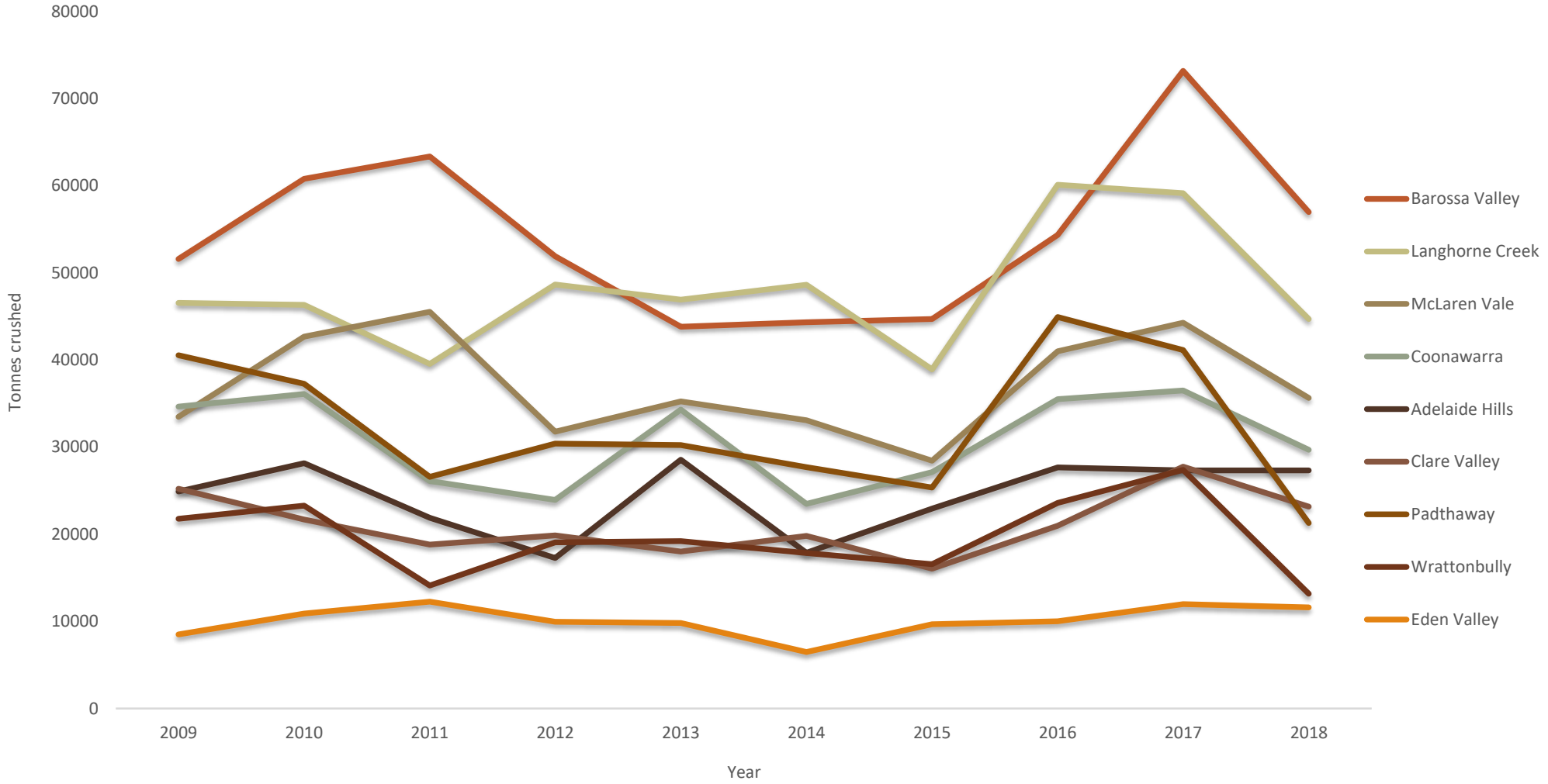


	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Actual tonnage	920,194	898,165	904,022	575,111	816,868	730,904	681,578	682,671	698,005	681,319	706,017	716,592	817,981	863,789	747,361

State summary 2018

Vintage by region 2009 - 2018

Not including the Riverland due to scale differences



State summary 2018

Total crush by GI region 2018 vs 2017

GI Region	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2018	Region share of state	Total crush 2017	% change
Adelaide Hills	6,392	20,925	27,318	3.7%	27,335	0%
Adelaide Plains	50	2,861	2,911	0.4%	3,496	-17%
Barossa Valley	20,906	34,547	55,454	7.4%	70,001	-21%
Barossa zone other	1,337	179	1,516	0.2%	3,008	-50%
Clare Valley	9,603	13,558	23,161	3.1%	27,752	-17%
Coonawarra	20,934	8,758	29,692	4.0%	36,509	-19%
Currency Creek	3,589	1,588	5,177	0.7%	9,211	-44%
Eden Valley	6,091	5,502	11,593	1.6%	11,975	-3%
Fleurieu zone other	495	2,265	2,760	0.4%	2,480	11%
Kangaroo Island	114	23	138	0.0%	99	39%
Langhorne Creek	17,156	27,540	44,695	6.0%	59,059	-24%
Limestone Coast zone other	4,565	5,088	9,652	1.3%	17,706	-45%
Lower Murray zone other	72	5,337	5,409	0.7%	3,720	45%
McLaren Vale	13,216	22,434	35,650	4.8%	44,153	-19%
Mount Benson	1,006	1,808	2,813	0.4%	1,858	51%
Mount Gambier		1,134	1,134	0.2%	769	47%
Mount Lofty Ranges zone other	70	1,273	1,343	0.2%	2,044	-34%
Padthaway	7,239	14,038	21,277	2.8%	41,100	-48%
Riverland	92,332	355,078	447,410	59.9%	470,123	-5%
Robe	2,141	738	2,879	0.4%	1,821	58%
Southern Fleurieu	580	722	1,302	0.2%	474	174%
Southern Flinders Ranges	402	314	717	0.1%	997	-28%
The Peninsulas	10	189	199	0.0%	214	-7%
Wrattonbully	6,859	6,301	13,160	1.8%	27,374	-52%
Total all regions	**215,160**	**532,201**	**747,361**	**100%**	**863,279**	**-13%**

State summary 2018

Vintage summary by GI region 2018

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2018	Est value of purchased grapes	Est value of all grapes
Adelaide Hills	Red	1,884	6,714	8,597	$10,118,848	$13,194,159
	White	4,508	14,212	18,720	$18,606,300	$24,428,873
	Total	6,392	20,925	27,318	$28,725,148	$37,623,032
Adelaide Plains	Red	7	2,106	2,114	$1,930,088	$1,936,847
	White	43	754	797	$659,785	$670,270
	Total	50	2,861	2,911	$2,589,873	$2,607,117
Barossa Valley	Red	21,044	30,560	51,604	63,701,098	$109,183,904
inc Barossa Zone other	White	1,200	4,166	5,366	3,244,971	$4,293,864
	Total	22,243	34,726	56,970	$66,946,068	$113,477,768
Clare Valley	Red	6,214	8,174	14,389	$10,365,774	$18,266,519
	White	3,389	5,384	8,773	$5,279,793	$8,744,578
	Total	9,603	13,558	23,161	$15,645,567	$27,011,097
Coonawarra	Red	18,091	7,951	26,042	$13,298,977	$42,373,661
	White	2,843	807	3,650	$626,734	$2,891,678
	Total	20,934	8,758	29,692	$13,925,711	$45,265,339
Currency Creek	Red	1,923	1,328	3,251	$1,380,996	$3,380,776
	White	1,666	260	1,926	$213,526	$1,341,581
	Total	3,589	1,588	5,177	$1,594,522	$4,722,357
Eden Valley	Red	2,642	2,939	5,582	$6,956,640	$13,388,809
	White	3,449	2,563	6,012	$3,559,133	$8,523,130
	Total	6,091	5,502	11,593	$10,515,773	$21,911,939
Fleurieu zone - other	Red	449	1,744	2,193	1,874,830	$2,345,172
inc Southern Fleurieu	White	741	1,266	2,007	842,098	$1,381,175
and Kangaroo Island	Total	1,189	3,010	4,200	$2,716,928	$3,726,347

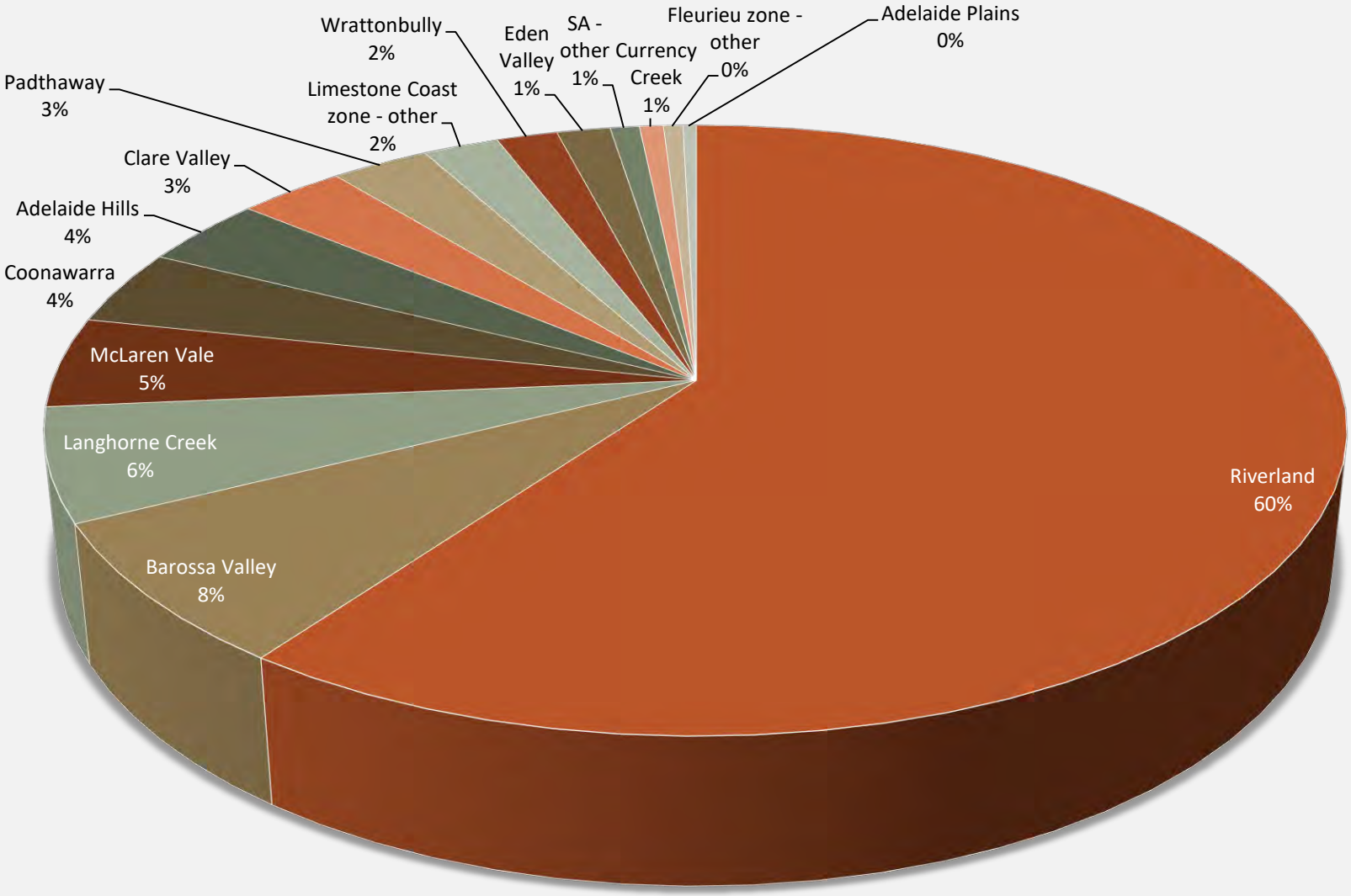
State summary 2018

Vintage summary by GI region 2018

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2018	Est value of purchased grapes	Est value of all grapes
Langhorne Creek	Red	13,959	22,454	36,413	$21,919,911	$35,165,362
	White	3,196	5,086	8,282	$3,087,601	$5,042,792
	Total	17,156	27,540	44,695	$25,007,512	$40,208,154
Limestone Coast zone - other	Red	5,723	6,432	12,155	6,719,582	$12,255,731
inc Robe, Mt Benson and	White	1,988	2,336	4,323	1,861,337	$3,198,037
Mt Gambier	Total	7,711	8,767	16,478	$8,580,919	$15,453,768
McLaren Vale	Red	12,521	20,241	32,762	$35,506,760	$57,555,091
	White	695	2,193	2,888	$1,996,662	$2,726,158
	Total	13,216	22,434	35,650	$37,504,990	$60,281,249
Padthaway	Red	4,006	6,773	10,780	$7,830,630	$12,367,807
	White	3,232	7,265	10,497	$5,436,703	$7,869,592
	Total	7,239	14,038	21,277	$13,267,332	$20,237,399
Riverland	Red	55,569	176,062	231,631	$82,688,619	$108,592,124
	White	36,764	179,016	215,779	$55,985,057	$67,864,140
	Total	92,332	355,078	447,410	$138,673,676	$176,456,264
Wrattonbully	Red	5,033	5,096	10,129	$6,544,613	$13,083,512
	White	1,826	1,205	3,030	$916,118	$2,566,103
	Total	6,859	6,301	13,160	$7,460,732	$15,649,615
SA - other	Red	554	4,128	4,682	$3,597,335	$4,082,965
inc The Peninsulas and	White	1	2,985	2,986	$1,104,486	$1,105,238
Southern Flinders Ranges	Total	555	7,113	7,668	$4,701,821	$5,188,203
All winegrapes	**Total**	**215,160**	**532,201**	**747,361**	**$377,855,788**	**$589,819,648**

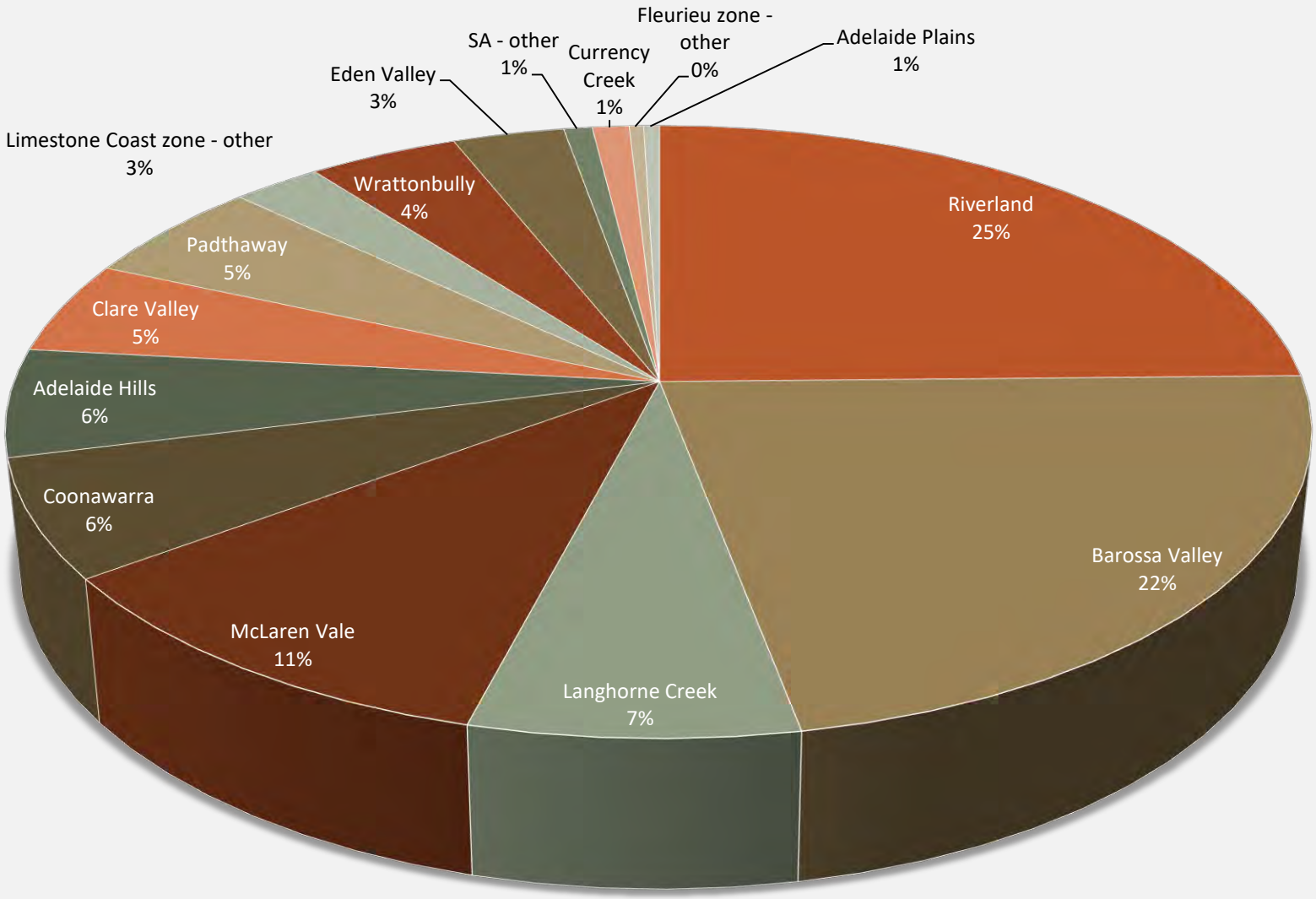
State summary 2018

Crush by region volume share 2018



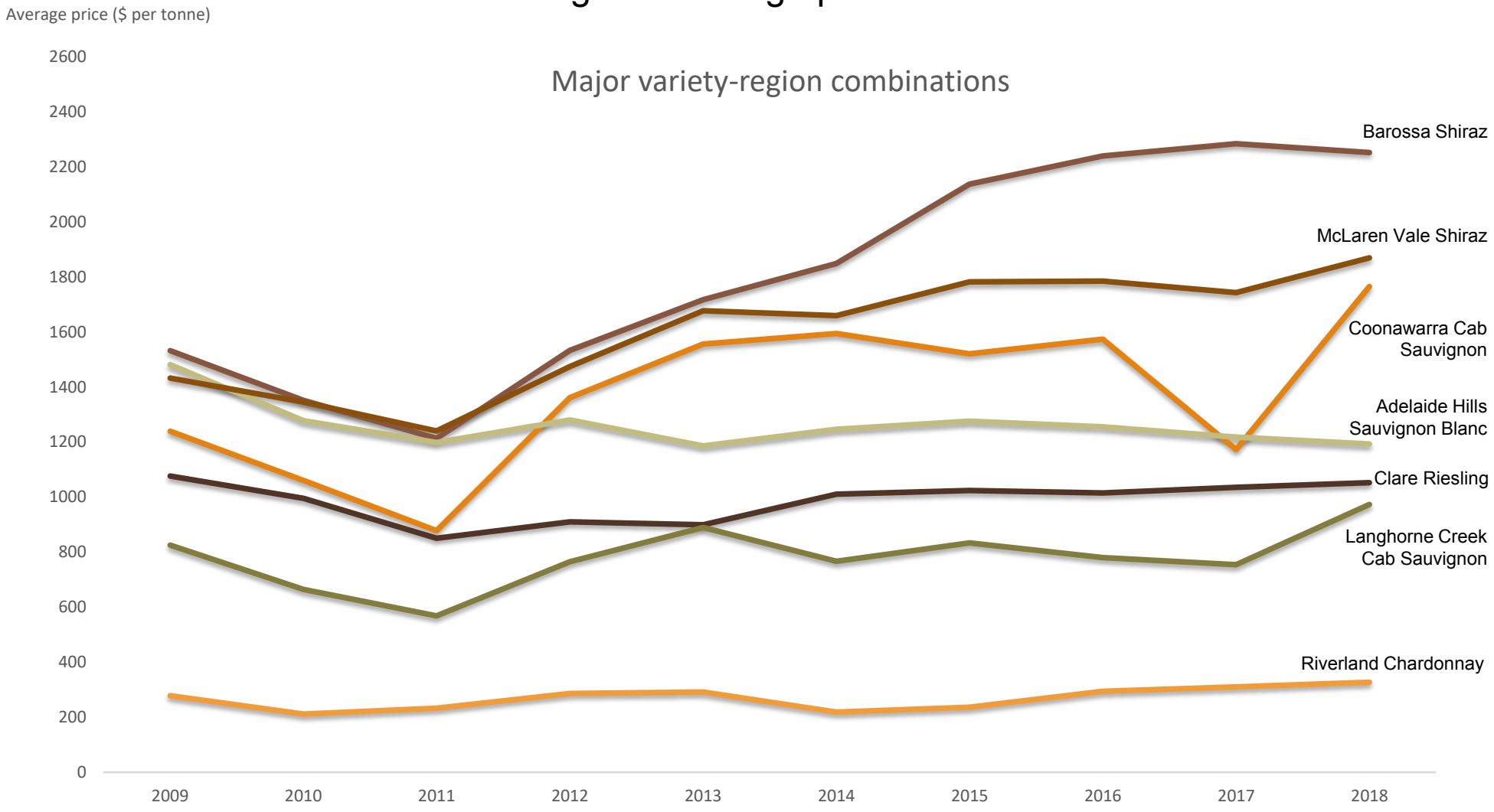
State summary 2018

Crush by region value share 2018



State summary 2018

Historical weighted average prices – 2009 - 2018

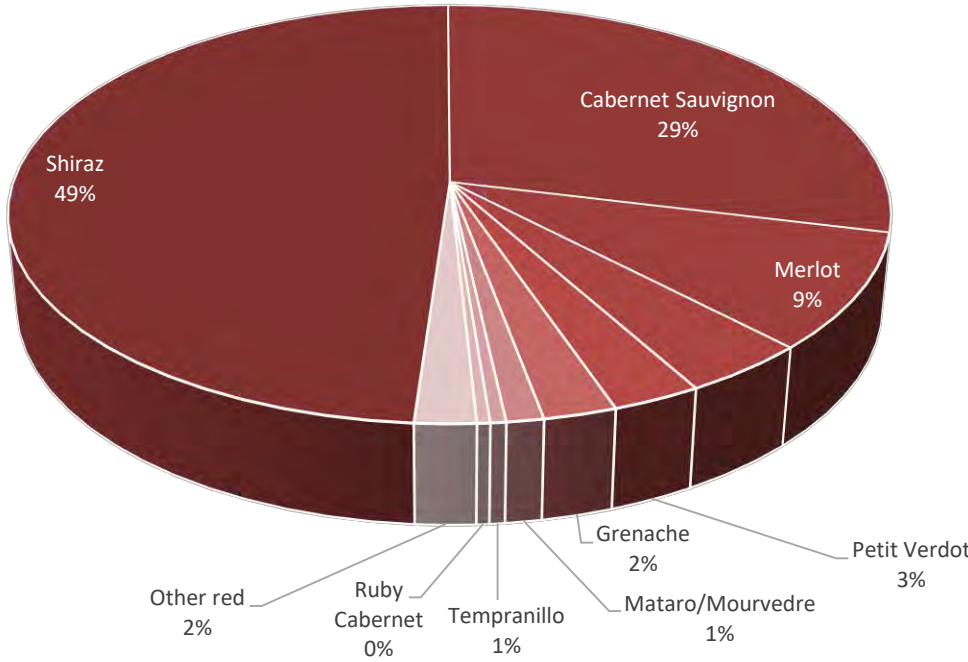


State summary 2018

Vintage summary by variety 2018 – red winegrapes

Variety	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2018	Purchased as share of total
Red				
Barbera	56	19	75	25%
Cabernet Franc	343	236	579	41%
Cabernet Sauvignon	46,258	84,504	130,762	65%
Dolcetto	20	22	42	53%
Durif	493	656	1,149	57%
Grenache	3,132	7,412	10,544	70%
Lagrein	6	82	89	93%
Malbec	718	998	1,715	58%
Mataro/Mourvedre	1,069	4,285	5,354	80%
Merlot	15,231	25,355	40,586	62%
Montepulciano	116	169	285	59%
Muscat Rouge a Petits Grains	17	197	215	92%
Nero d'Avola	64	46	110	42%
Petit Verdot	6,746	6,139	12,884	48%
Pinot Meunier	17	238	255	93%
Pinot Noir	3,268	15,195	18,463	82%
Ruby Cabernet	974	903	1,876	48%
Sangiovese	684	772	1,456	53%
Shiraz	68,761	152,034	220,795	69%
Tarrango		210	210	100%
Tempranillo	621	1,622	2,243	72%
Other red	1,025	1,611	2,636	61%
Red Total	**149,619**	**302,705**	**452,324**	67%

Share of red crush by variety

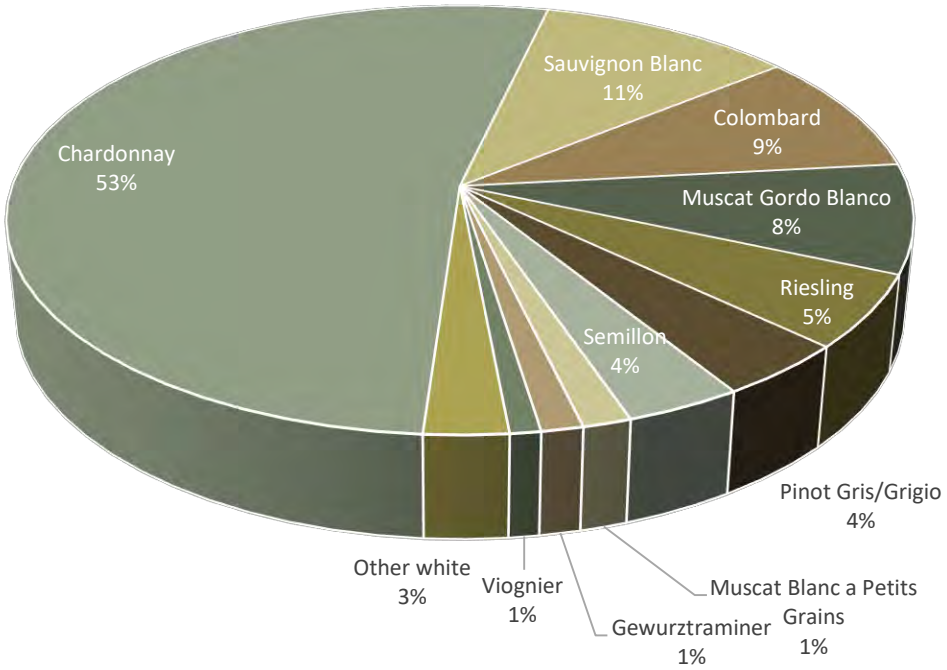


State summary 2018

Vintage summary by variety 2018 – white winegrapes

Variety	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2018	Purchased as share of total
White				
Canada Muscat	98	33	131	25%
Chardonnay	30,152	124,850	155,002	81%
Chenin blanc	31	1,641	1,672	98%
Colombard	3,520	23,330	26,850	87%
Doradillo	7	42	49	86%
Fiano	109	301	410	73%
Gewurztraminer	2,013	1,807	3,821	47%
Marsanne	76	120	196	61%
Moscato Giallo		66	66	100%
Muscadelle (Tokay)	37	44	81	54%
Muscat Blanc a Petits Grains	546	3,897	4,443	88%
Muscat Gordo Blanco	2,204	21,973	24,178	91%
Pinot Gris/Grigio	4,164	7,993	12,157	66%
Prosecco	32	51	83	62%
Riesling	7,290	8,956	16,246	55%
Roussanne	32	95	126	75%
Sauvignon Blanc	8,282	22,879	31,161	73%
Semillon	4,596	6,086	10,682	57%
Sultana		486	486	100%
Verdelho	281	1,989	2,270	88%
Vermentino	247	561	808	69%
Viognier	1,101	1,715	2,816	61%
Other white	722	581	1,303	45%
White Total	**65,541**	**229,496**	**295,037**	**78%**
Grand Total	**215,160**	**532,201**	**747,361**	**71%**

Share of white crush by variety



State summary 2018

Current plantings by variety and year planted – white winegrapes

Current area in hectares

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
White winegrapes						
Chardonnay	8,817	13	14	3	8,848	0%
Chenin Blanc	126	0	0	0	126	0%
Colombard	803	1	0	0	804	0%
Doradillo	37	0	0	0	37	0%
Fiano	45	0	6	0	51	0%
Marsanne	26	0	0	0	26	0%
Muscadelle (Tokay)	27	0	0	0	27	0%
Muscat A Petit Grains Blanc (White Frontignac)	203	0	0	0	203	0%
Muscat Gordo Blanco	972	6	0	1	978	0%
Palomino	27	0	0	0	27	0%
Pedro Ximenez	14	0	0	0	14	0%
Pinot Gris	949	15	41	19	1,024	2%
Riesling	2,404	8	48	6	2,466	0%
Roussanne	24	0	0	0	24	0%
Sauvignon Blanc	2,419	0	20	17	2,456	1%
Savagnin	36	0	0	0	36	0%
Semillon	974	0	0	0	974	0%
Sultana	146	0	0	0	146	0%
Traminer (Gewurztraminer)	225	0	0	0	225	0%
Trebbiano	16	0	0	0	16	0%
Verdelho	184	0	0	0	184	0%
Vermentino	47	0	0	0	47	0%
Viognier	379	0	2	0	380	0%
Other White	120	8	3	6	137	4%
Total white varieties	**19,020**	**51**	**134**	**52**	**19,256**	**0%**

Source: Vinehealth Australia

State summary 2018

Current plantings by variety and year planted – red winegrapes

Current area in hectares

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
Red winegrapes						
Barbera	29	0	1	0	30	0%
Cabernet Franc	172	1	1	3	177	2%
Cabernet Sauvignon	17,002	198	92	69	17,361	0%
Durif (Petite Sirah)	54	6	6	4	71	6%
Grenache	1,653	4	7	3	1,667	0%
Malbec	360	7	6	4	376	1%
Mataro (Mourvedre)	700	5	5	3	713	0%
Merlot	3,947	11	7	5	3,970	0%
Meunier (Pinot Meunier)	34	5	0	0	39	0%
Montepulciano	47	2	4	0	54	1%
Nebbiolo	34	0	0	0	34	0%
Petit Verdot	689	0	0	1	690	0%
Pinot Noir	1,617	4	10	7	1,638	0%
Ruby Cabernet	130	0	0	0	130	0%
Sagrantino	11	1	0	0	12	0%
Sangiovese	186	0	0	4	190	2%
Shiraz	26,340	415	267	237	27,259	1%
Tempranillo	314	7	5	6	332	2%
Touriga	43	1	5	2	51	5%
Zinfandel	28	1	0	0	29	0%
Other Red	282	11	26	10	329	3%
Total red varieties	**53,672**	**679**	**442**	**358**	**55,152**	**1%**
Unknown and other varieties	1139	19	1	0	1158	0%
Total all varieties	**73,831**	**749**	**577**	**410**	**75,566**	**1%**

Source: Vinehealth Australia

State summary 2018

Current plantings by region and year planted

Zone	Region	Pre-2015	2015	2016	2017	Total area	% planted in 2017
Barossa	Barossa Valley (inc Barossa zone other)	11,072	310	111	161	11,654	1%
	Eden Valley	2,274	14	42	5	2,335	0%
	Total for Barossa	**13,346**	**324**	**153**	**166**	**13,989**	**1%**
Far North	Southern Flinders Ranges	194	0	0	0	194	0%
	Total for Far North	**194**	**0**	**0**	**0**	**194**	**0%**
Fleurieu	Currency Creek	974	0	0	0	974	0%
	Fleurieu zone - other	230	0	0	0	230	0%
	Kangaroo Island	134	0	0	0	134	0%
	Langhorne Creek	5,879	21	28	9	5,936	0%
	McLaren Vale	7,155	67	53	48	7,324	1%
	Southern Fleurieu	488	0	0	0	488	0%
	Total for Fleurieu	**14,860**	**88**	**81**	**57**	**15,086**	**0%**
Limestone Coast	Bordertown	1,254	0	0	0	1,254	0%
	Coonawarra	5,703	101	5	9	5,818	0%
	Limestone Coast zone - other	597	0	0	0	597	0%
	Mount Benson	504	0	4	0	508	0%
	Mount Gambier	251	0	0	0	251	0%
	Padthaway	3,823	15	22	36	3,896	1%
	Robe	738	0	0	0	738	0%
	Wrattonbully	2,649	11	9	10	2,680	0%
	Total for Limestone Coast	**15,519**	**127**	**40**	**55**	**15,742**	**0%**
Lower Murray	Lower Murray zone - other	414	3	0	0	417	0%
	Riverland	19,966	150	202	56	20,375	0%
	Total for Lower Murray	**20,380**	**153**	**202**	**56**	**20,792**	**0%**
Mount Lofty Ranges	Adelaide Hills	3,747	14	34	33	3,830	1%
	Adelaide Plains	467	0	5	0	472	0%
	Clare Valley	4,917	41	62	40	5,060	1%
	Mount Lofty Ranges zone - other	329	0	0	0	329	0%
	Total for Mount Lofty Ranges	**9,460**	**55**	**101**	**73**	**9,691**	**1%**
The Peninsulas	The Peninsulas	71	0	0	0	71	0%
	Total for The Peninsulas	**71**	**0**	**0**	**0**	**71**	**0%**
	Total for all GIs	**73,830**	**747**	**577**	**407**	**75,565**	**1%**

Source: Vinehealth Australia

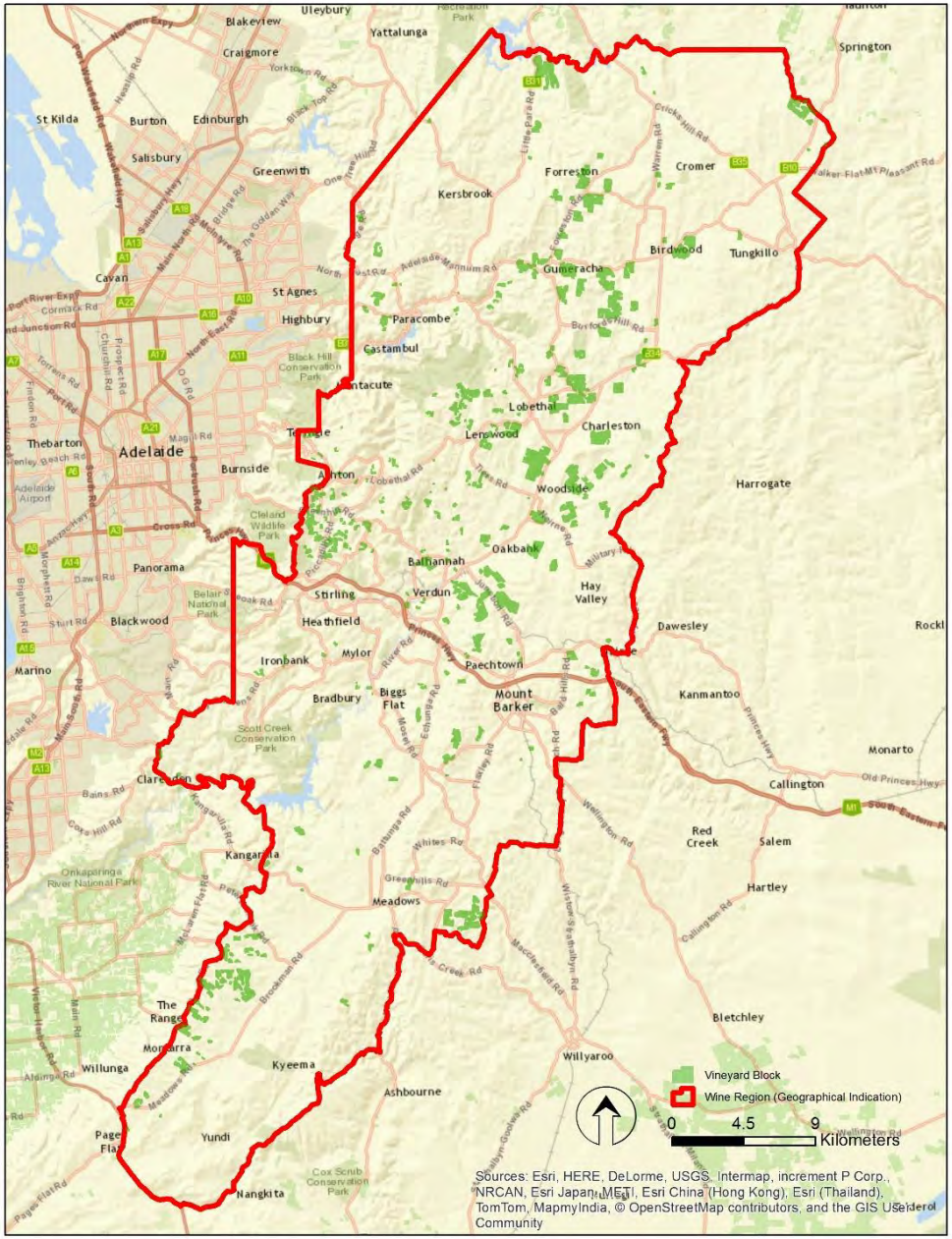
State summary 2018

Number of registered owners by region and property size

		<10 ha		10-24 ha		25-49 ha		50-99 ha		100+ ha		Total	
Zone	**Region**	**Area (ha)**	**# of registered owners**	**Area (ha)**	**# of registered owners**	**Area (ha)**	**# of registered owners**	**Area (ha)**	**# of registered owners**	**Area (ha)**	**# of registered owners**	**Area (ha)**	**# of registered owners**
Barossa	Barossa Valley	1,316	333	2,216	142	2,531	75	1,339	20	4,013	17	11,416	587
	Barossa zone - other	17	3	12	1			84	1	126	1	238	6
	Eden Valley	393	92	483	33	323	10	430	6	707	3	2,335	144
Far North	Southern Flinders Ranges	18	5	124	7			53	1			194	13
Fleurieu	Currency Creek	49	9	181	12	193	5			551	2	974	28
	Fleurieu zone - other	23	8	43	3			166	2			232	13
	Kangaroo Island	111	19	23	2							134	21
	Langhorne Creek	112	23	303	19	983	28	1,111	16	3,427	11	5,936	97
	McLaren Vale	1,547	365	1,714	110	1,384	43	1,298	18	1,380	6	7,324	542
	Southern Fleurieu	104	32	117	8	200	5	68	1			488	46
Limestone Coast	Bordertown					39	1			1,215	4	1,254	5
	Coonawarra	275	49	446	29	687	20	985	15	3,425	10	5,818	123
	Limestone Coast - other	57	13	66	4	27	1	202	3	244	2	597	23
	Mount Benson	22	4	88	5	60	2	209	3	129	1	508	15
	Mount Gambier	53	13	36	3	64	2	98	1			251	19
	Padthaway	9	1	56	4	430	11	606	8	2,795	12	3,896	36
	Robe	18	2	61	3	130	3	153	2	377	2	738	12
	Wrattonbully	84	14	284	16	569	15	330	4	1,413	5	2,680	54
Lower Murray	Lower Murray zone - other	49	13	207	11	162	5					417	29
	Riverland	2,704	550	4,188	262	2,848	82	2,301	33	8,334	36	20,375	963
Mount Lofty Ranges	Adelaide Hills	724	194	1,012	60	968	28	761	11	366	3	3,830	296
	Adelaide Plains	134	44	113	9	171	4	54	1			472	58
	Clare Valley	608	169	778	46	911	25	1,052	15	1,711	9	5,060	264
	Mount Lofty Ranges - other	90	27	47	3	104	3	88	1			329	34
The Peninsulas	The Peninsulas	17	4	21	2	33	1					71	7
Totals by size category		**8,533**	**1,986**	**12,616**	**794**	**12,815**	**369**	**11,389**	**162**	**30,213**	**124**	**75,566**	**3,435**
Total for SA												**75,566**	**3,326**

Note: registered vineyard owners can have vineyards in multiple regions. The total number of registered owners is therefore lower than the sum of the category totals for number of registered owners.

Source: Vinehealth Australia



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

Adelaide Hills Wine Region

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SA Winegrape Crush Survey

Regional Summary Report 2018

Adelaide Hills Wine Region

Wine Australia August 2018

Adelaide Hills

Vintage overview

VINTAGE REPORT

Despite the extremes in weather during the V2018 growing season, the final stages of both flavour development and sugar ripening combined to result in wines that will reflect the advantages of growing grapes in the Adelaide Hills.

Dry conditions in June 2017 threatened depleted soil moisture levels, not seen since the drought conditions experienced in the late 2000s. However, welcome rains in July corrected this deficit which was fortunate as the growing season rainfall was only 69% of the long-term average.

Bud-burst was late for the V2018 season, almost as late as recorded in the wet and cold conditions in the unusually late V2017. However, soil temperatures rose steadily resulting in an even budburst, although shoot growth was significantly slower than usual. For the second consecutive season the fruit zone was compact and shaded and it was not until the second week of November that the rate shoot growth returned to normal. Fortunately, rainfall was below average, and most vineyards reported minimal disease pressure.

Fruit set throughout the region was average to above average. Canopies developed to be as large as V2016 with full capacity to ripen crop loads. January, February (equal to V2013 and V2015) and April were the warmest recorded in the last eight seasons. Fortunately, a cooler than average March enabled ideal night temperatures for colour and flavour development. A long slow ripening, particularly for red varieties, resulted in wines that will be remembered for their depth of flavour and colour.

Richard Hamilton, Adelaide Hills Wine

OVERVIEW OF VINTAGE STATISTICS

A total of 27,318 tonnes of Adelaide Hills winegrapes was crushed in 2018, almost identical to the 2017 crush of 27,335 tonnes.

The 2018 crush is 10% above the five-year average crush from the region (24,876 tonnes). The maximum over that timeframe was 28,559 tonnes in 2013 and the minimum was 17,873 tonnes in 2014.

The total value of winegrapes increased very slightly to $37.6 million as there was also little change in the overall average price.

The minimal overall change in average price was a result of increases in some major varieties offsetting decreases in others. The average price paid for Adelaide Hills' largest variety, Sauvignon Blanc, decreased by 2% to $1193 per tonne, while Chardonnay increased by 3% to $1427 per tonne. In the reds, decreases for Pinot Noir (down 2% to $1522 per tonne) and Shiraz (down 4% to $1791 per tonne) were offset by increases in Cabernet Sauvignon (up 5% to $1601 per tonne), Merlot (up 7% to $855 per tonne) and other smaller varieties.

The price dispersion data shows that 43% of red varieties were purchased at $1500 and above compared with 48% in 2017. For the whites, the proportion sold at $1500 and above remained at 30%.

There were 33 hectares of new vines planted in the 2017 planting season – a planting rate of less than 1%. Two thirds of these new plantings were white varieties, with Sauvignon Blanc (11ha) and Pinot Gris (5ha) the largest contributors. The total area planted in the region as at 30 April 2018 is 3,830 hectares, very similar to the area 5 years ago of 3,931 hectares.

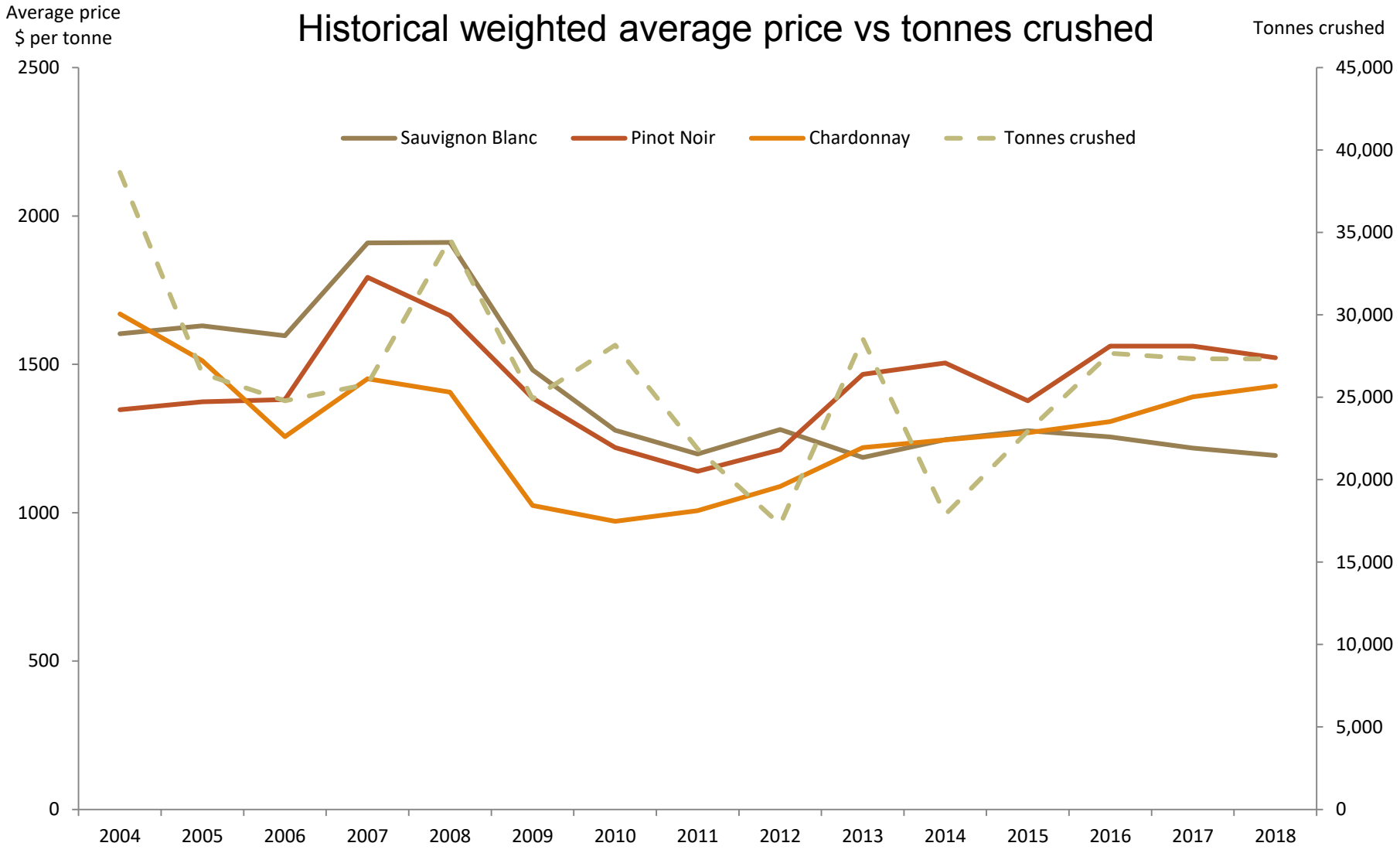
Adelaide Hills

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													
Barbera	7				2	5	$14,899	$2,093	6%	16	69%	23	$48,045
Cabernet Franc	3				3					37	93%	40	$60,542
Cabernet Sauvignon	400			209	130	62	$641,055	$1,601	5%	216	35%	616	$987,014
Dolcetto										4	100%	4	$3,441
Lagrein										6	100%	6	$7,246
Malbec	6				6						0%	6	$8,892
Mataro/Mourvedre										3	100%	3	$4,733
Merlot	623			598	17		$532,816	$855	7%	46	7%	669	$572,270
Montepulciano	13				9	4	$26,494	$2,023	-1%		0%	13	$26,494
Nero d'Avola	7				7						0%	7	$14,760
Pinot Meunier	182			62	118	2	$275,207	$1,516	3%		0%	182	$275,207
Pinot Noir	4,396			2,491	1,354	519	$6,692,820	$1,522	-2%	766	15%	5,162	$7,858,585
Sangiovese	45			30	15		$61,306	$1,364	21%		0%	45	$61,306
Shiraz	914			383	237	284	$1,636,588	$1,791	-4%	669	42%	1,583	$2,834,380
Tempranillo	90			16	62	11	$151,523	$1,691	4%	63	41%	153	$258,299
Other red	28				6	21	$56,322	$2,045	4%	57	67%	85	$172,944
Red total	**6,714**			**3,789**	**1,965**	**910**	**$10,118,848**	**$1,507**	**0%**	**1,884**	**22%**	**8,597**	**$13,194,159**
White													
Chardonnay	5,924		109	3,782	1,153	869	$8,453,206	$1,427	3%	1,102	16%	7,027	$10,026,280
Fiano										10	100%	10	$16,621
Gewurztraminer	84			76	8		$71,207	$843	10%	7	7%	91	$76,907
Muscat Blanc a Petits Grains	10			10							0%	10	$7,768
Pinot Gris/Grigio	1,625			849	574	153	$2,347,468	$1,445	1%	881	35%	2,506	$3,620,621
Prosecco	32			32						32	50%	63	$56,988
Riesling	220			150	45	25	$249,344	$1,134		51		270	$306,646
Sauvignon Blanc	6,006		48	4,501	1,339	74	$7,164,287	$1,193	-2%	2,157	26%	8,163	$9,736,791
Semillon	185		128	48	9		$108,701	$587	-24%	115	38%	300	$176,202
Vermentino	10			10							0%	10	$8,080
Viognier	20			19	1		$21,482	$1,063	5%	29	59%	49	$52,064
Other white	95			22	49	25	$149,079	$1,563	7%	125	57%	220	$343,904
White total	**14,212**		**285**	**9,498**	**3,179**	**1,145**	**$18,606,300**	**$1,309**	**1%**	**4,508**	**24%**	**18,720**	**$24,428,873**
Grand total	**20,925**		**285**	**13,287**	**5,144**	**2,055**	**$28,725,024**	**$1,373**	**0%**	**6,392**	**23%**	**27,318**	**$37,623,032**

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

Adelaide Hills

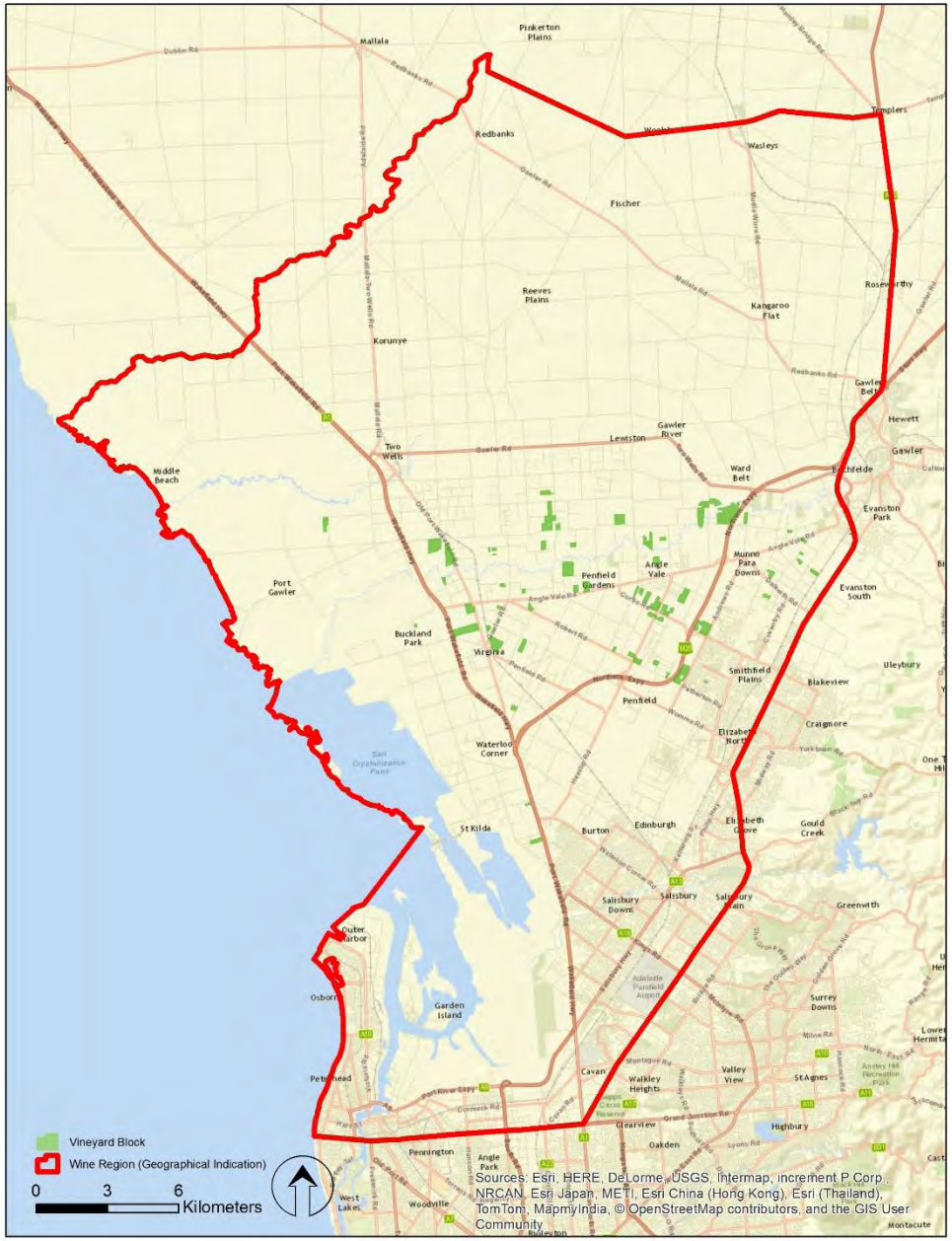


Adelaide Hills

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Franc	7	0	0	0	8	0%
Cabernet Sauvignon	189	0	3	0	192	0%
Grenache	2	0	0	0	2	0%
Merlot	143	0	0	0	143	0%
Meunier (Pinot Meunier)	25	0	0	0	25	0%
Nebbiolo	10	0	0	0	10	0%
Pinot Noir	663	3	10	4	681	1%
Sangiovese	13	0	0	0	13	2%
Shiraz	355	1	8	4	368	1%
Tempranillo	29	0	1	2	31	5%
Other red	32	2	1	0	35	0%
Total red varieties	**1,468**	**6**	**23**	**10**	**1,508**	**1%**
White winegrapes						
Chardonnay	809	6	7	3	825	0%
Gruner Veltliner	17	1	0	1	19	5%
Pinot Gris	250	0	0	5	255	2%
Riesling	61	0	0	1	62	2%
Sauvignon Blanc	975	0	2	11	989	1%
Semillon	50	0	0	0	50	0%
Traminer (Gewurztraminer)	22	0	0	0	22	0%
Viognier	23	0	0	0	23	0%
Other white	36	1	1	2	40	5%
Total white varieties	**2,243**	**8**	**10**	**23**	**2,285**	**1%**
Rootstock Block	2	0	0	0	2	0%
Unknown variety	34	0	1	0	35	0%
Total all varieties	**3,747**	**14**	**34**	**33**	**3,830**	**1%**

Source: Vinehealth Australia



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

Adelaide Plains Wine Region

Vinehealth AUSTRALIA

SA Winegrape Crush Survey

Regional Summary Report 2018

Adelaide Plains Wine Region

Wine Australia August 2018

Adelaide Plains

Vintage overview

OVERVIEW OF VINTAGE STATISTICS

A total of 2,911 tonnes of Adelaide Plains winegrapes was crushed in 2018, down 17% from 3,496 tonnes in 2017.

The five-year average crush from this region (2013-2017) is 3,843 tonnes, meaning that the 2018 yield overall was 24% below the average and also below the minimum crush over the period which was 3,091 tonnes in 2015. The maximum crush of 4,396 tonnes was recorded in 2016.

The total value of winegrapes declined from just over $3 million in 2017 to $2.6 million in 2018 as a result of the lower tonnage. For most varieties the average price paid increased. Shiraz increased by 8% to $957 per tonne, Merlot by 1% to 742 per tonne and Cabernet Sauvignon by less than 1% to $951 per tonne.

The price dispersion data shows an upward shift in prices, with 87% of red varieties purchased at between $600 and $1500 compared with 95% last year, while 10% were purchased at over $1500 compared with 3% in 2017. For the whites, 13% were purchased in the lowest price bracket of below $600 per tonne, which was a higher proportion than in 2017 (9%) but lower than in 2016 (17%) and 2015 (37%).

There were no new plantings in Adelaide Plains in the 2017 planting season. The total area planted as at 30 April 2018 is 472 hectares compared with 477 hectares in 2017 and is 28% lower than it was in 2013 (657 hectares).

Adelaide Plains

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 Sauvignon	255			240	15		$242,166	$951	0%	7	3%	262	$248,925
Grenache	81			81							0%	81	$56,070
Mataro/Mourvedre	48			27	21						0%	48	$51,585
Merlot	127			127			$94,503	$742	1%		0%	127	$94,503
Montepulciano	4			4							0%	4	$4,800
Pinot Noir	86		51	35							0%	86	$46,443
Sangiovese	21			21							0%	21	$12,624
Shiraz	1,477			1,297	180		$1,413,598	$957	8%		0%	1,477	$1,413,598
Tempranillo	8			8							0%	8	$8,300
Red total	**2,106**		**51**	**1,839**	**216**		**$1,930,088**	**$916**	**5%**	**7**	**0%**	**2,114**	**$1,936,847**
White													
Chardonnay	251		70	180							0%	251	$181,303
Chenin blanc	25		25								0%	25	$7,605
Colombard										43	100%	43	$10,486
Pinot Gris/Grigio	236			236							0%	236	$251,525
Sauvignon Blanc	226			226			$198,500	$878			0%	226	$198,500
Viognier	16			16							0%	16	$20,852
White total	**754**		**96**	**658**			**$659,785**	**$875**		**43**	**5%**	**797**	**$670,270**
Grand total	**2,861**		**147**	**2,498**	**216**		**$2,589,873**	**$905**	**5%**	**50**	**2%**	**2,911**	**$2,607,117**

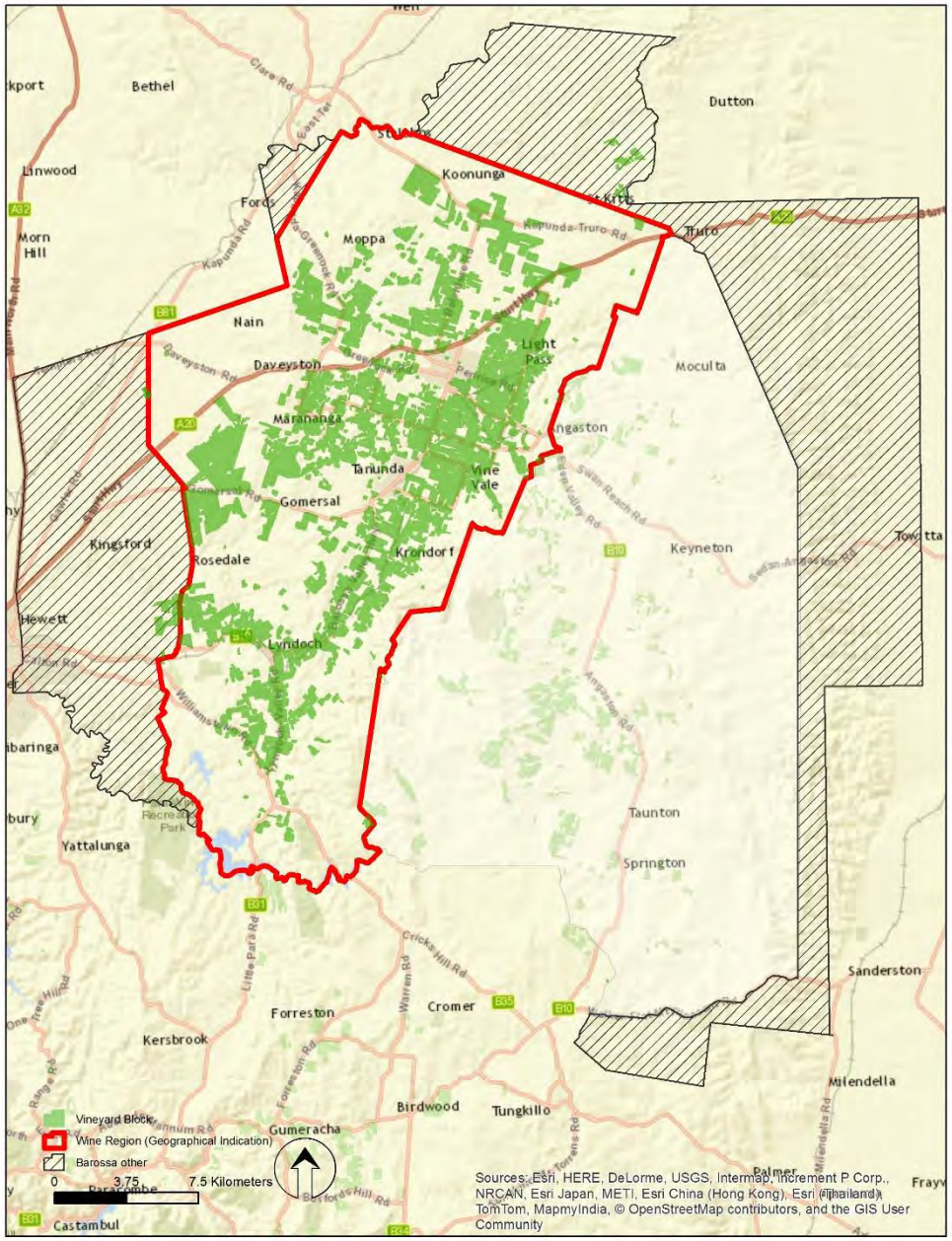
Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Adelaide Plains

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Sauvignon	53	0	0	0	53	0%
Grenache	28	0	0	0	28	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	39	0	0	0	39	0%
Pinot Noir	13	0	0	0	13	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	187	0	0	0	188	0%
Other red	15	0	0	0	15	0%
Total red varieties	**349**	**0**	**0**	**0**	**350**	**0%**
White winegrapes						
Chardonnay	27	0	0	0	27	0%
Pinot Gris	28	0	3	0	31	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	26	0	0	0	26	0%
Semillon	2	0	0	0	2	0%
Other white	15	0	2	0	17	0%
Total white varieties	**105**	**0**	**4**	**0**	**109**	**0%**
Unknown variety	13	0	0	0	13	0%
Total all varieties	**467**	**0**	**5**	**0**	**472**	**0%**

Source: Vinehealth Australia



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Barossa Valley Wine Region
inc Barossa Zone other

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SA Winegrape Crush Survey

Regional Summary Report 2018

Barossa Valley Wine Region
(inc Barossa Zone other)

Wine Australia August 2018

Barossa Valley

Vintage overview

VINTAGE REPORT

Barossa grape growers and winemakers will be happy with a high-quality 2018 vintage and good yields.

The growing season started off well, with Winter 2017 rainfall around 10% higher than average. However, spring rainfall was only 78% of average in the Barossa Valley (BV) and December rainfall was only 57% of average.

Drier soils, combined with warmer than average October and November days (October 2ºC above average and November 1.1ºC above average, meant the vine canopies grew quickly; flowering well and setting a good number of bunches.

January and February were warm and dry, with very warm temperatures in February slowing down the pace of ripening. January was slightly above average (1.4ºC during the day but closer to average at night) and February was about average during the day, but with significantly warmer than average night time temperatures in Barossa Valley (5.8ºC warmer).

With summer rainfall 50% of average, growers with access to water, soil moisture monitoring, good irrigation management and healthy soils experienced less stress – and subsequently delivered sound fruit and consistent yields.

The Indian summer of March and early April, with average temperatures, without extremes, was perfect for finishing off vintage. The 28-30mm of rain on 14/15 April did not cause any major problems for picking and will be a welcome post-harvest watering for most Barossa growers.

While there is variation across Barossa, Shiraz yields are generally around 10-20% below the long-term average – but higher than the (very low yielding) five years prior to 2017. Cabernet Sauvignon is reported to be average to 15-20% down on the long-term average.

Nicki Robins, Barossa Grape & Wine Association

OVERVIEW OF VINTAGE STATISTICS

The 2018 Barossa Valley recorded crush[1] was 56,970, down 22% from the 2017 crush of 73,174 tonnes but still the second highest since 2011.

Over the last 5 years (2013-2017), the average Barossa Valley reported production has been 52,082 tonnes, with a low of 43,824 tonnes in 2013. The 2017 crush was the highest in the five-year period, and in fact the highest since 2006. The 2018 crush was 9% above the 5-year average.

The total value of grapes from the region is estimated to be $113 million in 2018, down from $147 million in 2017 as a result of the lower tonnages.

After big increases in average purchase price for most varieties in 2017, there were only small changes this year. Shiraz declined by 1% to $2252 per tonne and Cabernet Sauvignon declined by 2% to $2007 per tonne, but Merlot (up 1% to $1135 per tonne) and Grenache (up 1% to $1719) both increased slightly. In the white varieties, Chardonnay increased by 5% to $636 per tonne, while Semillon declined 5% to $684 per tonne.

The price dispersion data shows that, while the proportion of red varieties purchased at $1500 per tonne or more was the same as in 2017 (91%), the proportion purchased at $2000 or more decreased from 65% to 51%.

There were 161 hectares of new plantings in the Barossa Valley in the 2017 planting season (including top-working and replacements) compared with 111 hectares in the previous year. Shiraz accounted for nearly all of the new plantings (148 hectares).

Despite the new plantings, the total area of vineyards in the Barossa Valley as at 30 April 2018 had reduced by nearly 1,000 hectares to 10,460 hectares, compared with 11,525 in 2017. In 2013 the total area was 11,394 hectares.

[1] Report includes crush from Barossa Zone – other (1,516 tonnes)

Barossa Valley

Winegrape intake summary table - red

	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													
Barbera	5		5		0						0%	5	$2,648
Cabernet Franc	77			74	2		$88,360	$1,154	3%	45	37%	121	$140,025
Cabernet Sauvignon	3,963		22	161	2,329	1,451	$7,953,281	$2,007	-2%	3,344	46%	7,306	$14,664,235
Durif	72			7	55	10	$115,266	$1,599	-4%	4	5%	76	$120,991
Grenache	2,396			597	1,292	506	$4,117,391	$1,719	1%	614	20%	3,010	$5,172,349
Lagrein	1			1							0%	1	$627
Malbec	21				15	7	$37,185	$1,752	0%	50	70%	71	$125,241
Mataro/Mourvedre	743			99	326	319	$1,410,173	$1,899	-4%	437	37%	1,180	$2,240,027
Merlot	1,282			984	298		$1,454,814	$1,135	1%	204	14%	1,486	$1,686,244
Montepulciano	23			5	1	17	$47,519	$2,041		34	59%	57	$116,740
Muscat Rouge a Petits Grains	12			12						15	55%	27	$25,598
Nero d'Avola	20			4	16		$28,753	$1,464		26	57%	45	$66,579
Petit Verdot	54			23	23	8	$73,190	$1,366	7%	24	31%	78	$106,364
Pinot Meunier	16			16						1	5%	17	$23,296
Pinot Noir	131			131			$106,107	$810	10%		0%	131	$106,107
Sangiovese	268			241	5	22	$371,620	$1,386	1%	78	23%	346	$479,673
Shiraz	20,726			43	7,508	13,176	$46,683,653	$2,252	-1%	15,932	43%	36,658	$82,568,234
Tempranillo	425			26	393	5	$717,707	$1,690	3%	103	19%	527	$891,126
Other red	327			222	76	29	$459,211	$1,405	-13%	134	29%	461	$647,800
Red total	**30,560**		**27**	**2,645**	**12,340**	**15,548**	**$63,701,098**	**$2,084**	**-2%**	**21,044**	**41%**	**51,604**	**$109,183,904**

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

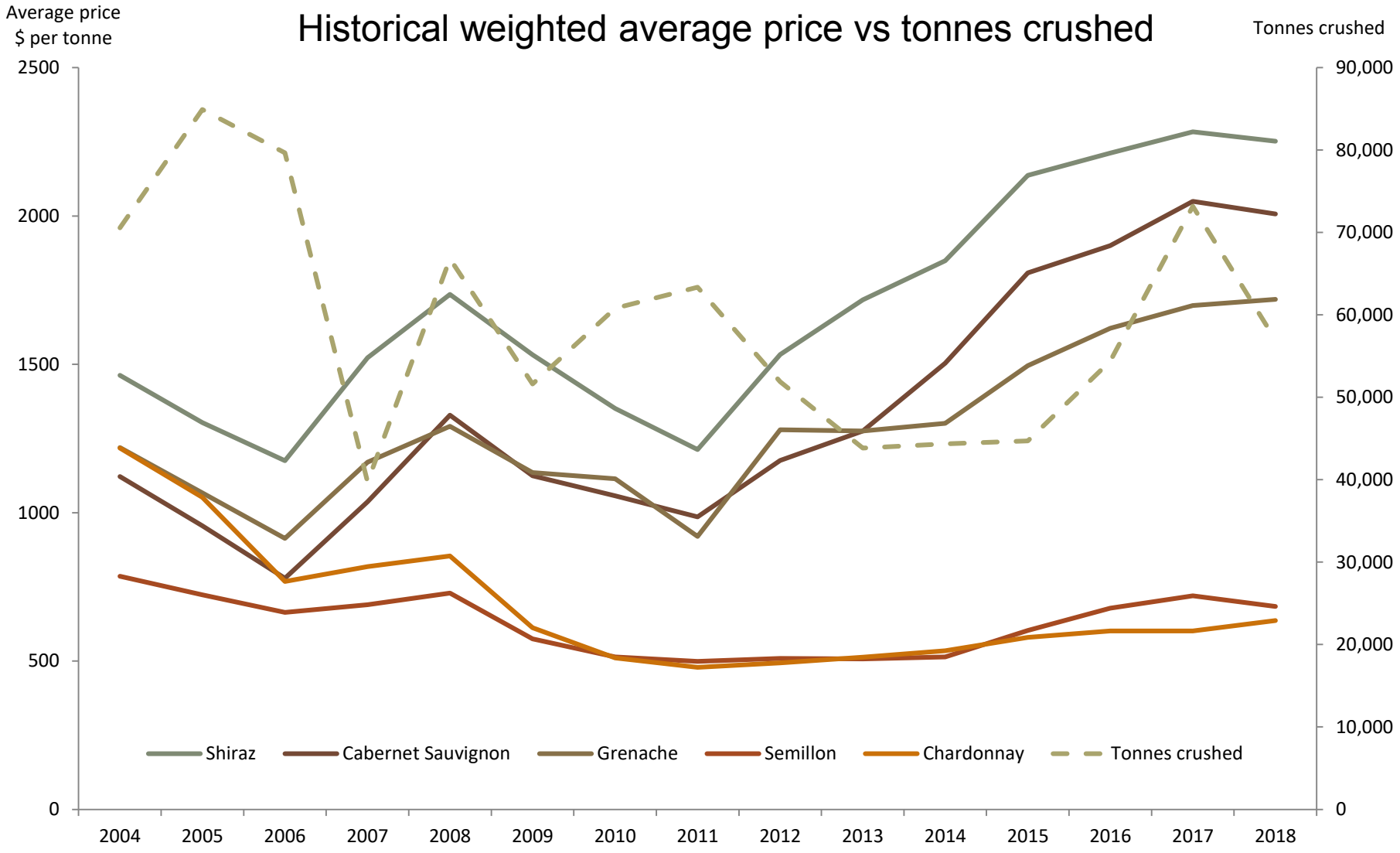
Barossa Valley

Winegrape intake summary table - white

	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	1,331		239	1,092			$846,870	$636	5%	271	17%	1,602	$1,019,390
Chenin blanc	29			20	9		$30,575	$1,050	19%		0%	29	$30,575
Fiano	7			7						36	84%	43	$40,404
Gewurztraminer	68			68							0%	68	$50,880
Marsanne	21		5	11	5		$26,554	$1,252		43	67%	64	$79,792
Muscadelle (Tokay)	12			12			$12,462	$1,073	41%		0%	12	$12,462
Muscat Blanc a Petits Grains	178		41	137			$151,245	$850	16%	65	27%	243	$206,851
Pinot Gris/Grigio	81			81			$88,399	$1,088	10%	67	45%	148	$161,209
Riesling	481		9	466	7		$419,000	$871	4%	89	16%	570	$496,658
Roussanne	17			2	14		$26,485	$1,587	-1%	2	12%	19	$30,100
Sauvignon Blanc	335			335			$280,663	$837	4%	42	11%	377	$315,484
Semillon	1,190		327	847	16		$813,796	$684	-5%	298	20%	1,488	$1,017,727
Vermentino	110			110			$99,946	$907			0%	110	$99,946
Viognier	264			243	7	14	$342,620	$1,298	2%	63	19%	327	$424,871
Other white	42			27	15		$49,110	$1,157	0%	223	84%	266	$307,517
White total	**4,166**		**620**	**3,459**	**73**	**14**	**$3,244,971**	**$779**	**3%**	**1,200**	**22%**	**5,366**	**$4,293,864**
Grand total	**34,726**		**647**	**6,104**	**12,413**	**15,563**	**$66,946,068**	**$1,928**	**-1%**	**22,243**	**39%**	**56,970**	**$113,477,768**

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

Barossa Valley



Barossa Valley

Current plantings by variety and year planted – red winegrapes

Includes Barossa Zone other (237 hectares)

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Franc	28	0	0	2	29	5%
Cabernet Sauvignon	1,488	73	23	7	1,591	0%
Durif (Petite Sirah)	19	1	0	0	19	0%
Grenache	661	0	5	0	666	0%
Malbec	22	2	1	1	26	3%
Mataro (Mourvedre)	258	1	0	1	260	0%
Merlot	334	0	1	1	337	0%
Petit Verdot	19	0	0	0	19	1%
Pinot Noir	36	0	0	0	36	0%
Sangiovese	27	0	0	0	27	0%
Shiraz	6,775	227	78	148	7,228	2%
Tempranillo	98	2	1	0	101	0%
Zinfandel	12	0	0	0	12	0%
Other red	103	2	2	1	109	1%
Total red varieties	**9,880**	**308**	**111**	**161**	**10,460**	**2%**

Source: Vinehealth Australia

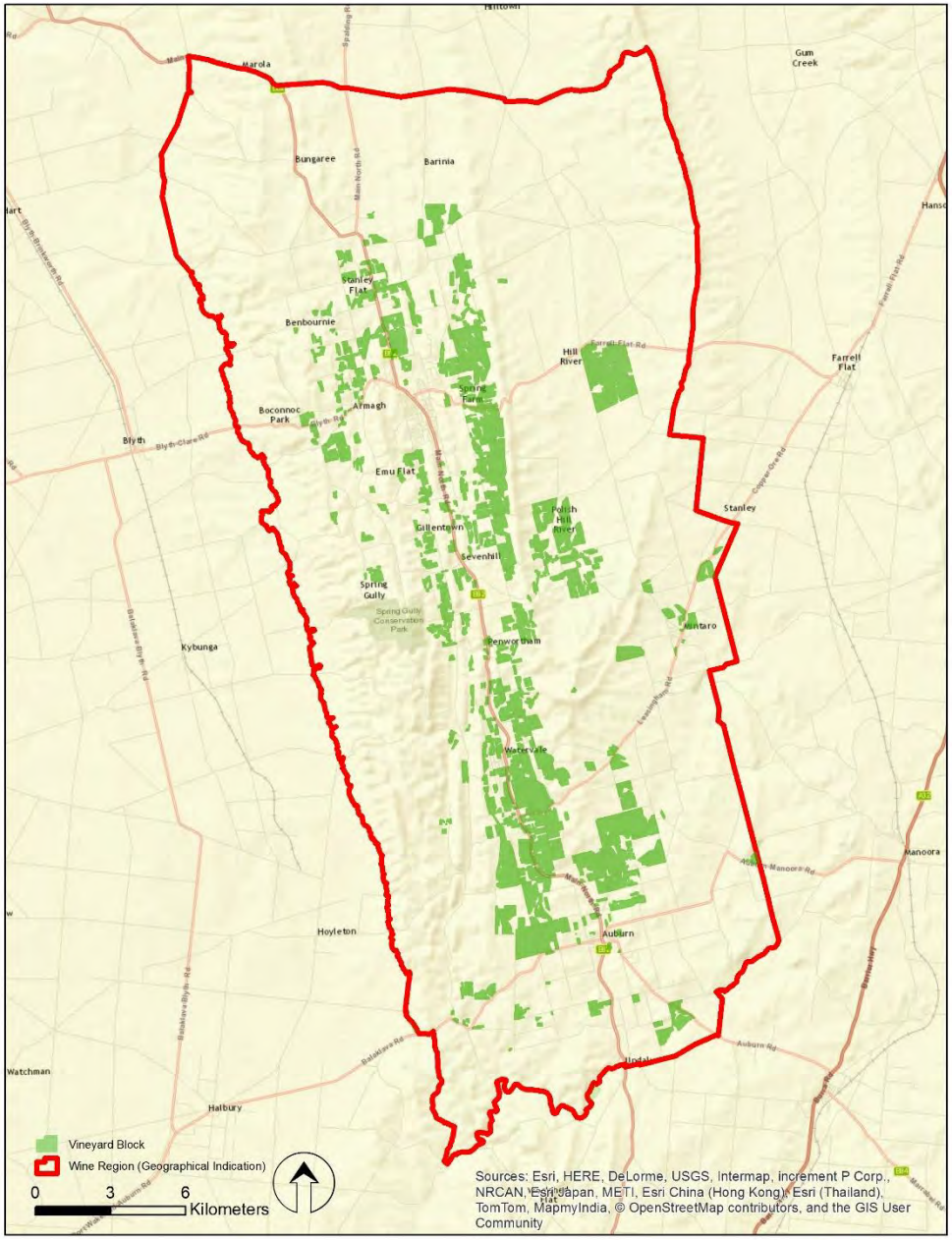
Barossa Valley

Current plantings by variety and year planted – white winegrapes

Includes Barossa Zone other (237 hectares)

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
White winegrapes						
Chardonnay	305	0	0	0	305	0%
Chenin Blanc	15	0	0	0	15	0%
Marsanne	11	0	0	0	11	0%
Muscadelle (Tokay)	13	0	0	0	13	0%
Muscat A Petit Grains Blanc (White Frontignac)	52	0	0	0	52	0%
Pedro Ximenez	5	0	0	0	5	0%
Pinot Gris	16	1	0	0	16	0%
Riesling	160	1	0	0	161	0%
Sauvignon Blanc	54	0	0	0	54	0%
Semillon	336	0	0	0	336	0%
Vermentino	7	0	0	0	7	0%
Viognier	57	0	0	0	57	0%
Other white	48	0	0	0	48	0%
Total white varieties	**1,080**	**2**	**0**	**0**	**1,082**	**0%**
Unknown variety	112	0	0	0	112	0%
Total all varieties	**11,072**	**310**	**111**	**161**	**11,654**	**1%**

Source: Vinehealth Australia



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

Clare Valley Wine Region

Vinehealth AUSTRALIA

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SA Winegrape Crush Survey

Regional Summary Report 2018

Clare Valley Wine Region

Wine Australia August 2018

Clare Valley

Vintage overview

VINTAGE REPORT

The vintage started in earnest in the first week in February, about 2 or 3 weeks earlier than 2017 due to the long dry growing season. Whilst we escaped any significant spring frost this season, the rainfall for the growing season was well below average. We entered the growing season with less than ideal soil moisture levels after a dry finish to the winter last year and a very dry spring. This dry pattern continued right through the growing season with only one significant rain event (30mm) in early December and in total less than 150mm for the whole growing season (Oct-March). Total annual rainfall for 2017 was well below average as well, with only about 500mm being recorded across most of the region.

Average ambient temperatures were above average as well, with night time temperatures being warmer than average, rather than any extended heat wave conditions during the growing season. A couple of short bursts of extreme temperatures in January and February did cause some concern in terms of basal leaf loss, causing some sunburn and scorch in those vineyards without adequate soil moisture reserves and or appropriate canopy management or weed control.

Disease pressure was not surprisingly very low over this last season; on the other hand, water usage this last season would be one of the highest in the last decade and those vineyards without adequate water resources certainly felt the impact from mid-January onwards.

Overall, yields across the region are expected to be down about 10-15% on last year. In terms of quality, Riesling was the standout white variety, proving once again what a resilient variety it is in this region. Yields held up well and the quality overall was very good to excellent. Other varieties such as Malbec, Tempranillo, Sangiovese and Mourvedre are also showing great promise.

Andrew Pike, Chairperson, Clare Valley Winemakers

OVERVIEW OF VINTAGE STATISTICS

A total of 23,161 tonnes of Clare Valley winegrapes was crushed in 2018, down from 27,752 tonnes in 2017 but up from 20,795 tonnes in 2016. Over the past five years (up to 2017), the average crush for Clare has been 20,512 tonnes, making this year's crush 13% above the five-year average. It is also the second highest since 2009.

The total value of winegrapes in 2018 decreased by $5 million to $27 million as a result of the lower production.

The average price overall was unchanged, with increases in Riesling, Shiraz and Merlot offset by decreases in Cabernet Sauvignon and Chardonnay. The average for Shiraz increased by 2% to $1441 per tonne and Cabernet Sauvignon fell by 1% to $1088 per tonne. The region's largest variety, Riesling, increased by 2% to $1052 per tonne while Chardonnay decreased by 1% to $707 per tonne.

The price dispersion data shows that 13% of red varieties were sold at above $1500 per tonne, down from 20% in 2017. Overall 88% of fruit was purchased at between $600 and $1500 per tonne – a relatively narrow dispersion range.

There were 40 hectares of new vines planted in the region in the 2017 season. Unlike last year, when almost all the new plantings were Riesling, this year 85% were red varieties with Shiraz the largest (17 hectares).

The total vineyard area in Clare as at 30 April 2018 is 5,060 hectares – a small net reduction since 2017 (5,178 hectares) and 300 hectares below the total area five years ago.

Clare Valley

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										16	100%	16	$20,239
Cabernet Sauvignon	2,010			1,895	83	32	$2,187,313	$1,088	-1%	1,865	48%	3,875	$4,216,537
Grenache	101			73	29		$136,397	$1,345	-9%	153	60%	255	$342,433
Malbec	263			216	47		$337,255	$1,284	4%	125	32%	387	$497,376
Mataro/Mourvedre	161			124	30	7	$214,785	$1,332	-9%	57	26%	218	$290,339
Merlot	966			966			$838,670	$868	3%	545	36%	1,511	$1,312,076
Montepulciano	5					5				4	47%	9	$20,356
Muscat Rouge a Petits Grains										3	100%	3	$3,765
Petit Verdot										31	100%	31	$30,883
Pinot Noir										32	100%	32	$54,790
Sangiovese	117			117			$121,936	$1,043	5%	30	20%	146	$152,758
Shiraz	4,414			3,614	578	222	$6,359,951	$1,441	2%	3,228	42%	7,642	$11,010,363
Tempranillo	137			126	11		$158,640	$1,156		97	41%	234	$270,815
Other red										29	100%	29	$43,789
Red total	**8,174**			**7,130**	**778**	**266**	**$10,365,774**	**$1,268**	**0%**	**6,214**	**43%**	**14,389**	**$18,266,519**
White													
Chardonnay	658		161	497			$465,340	$707	-1%	355	35%	1,013	$716,273
Fiano	24			17	7					35	59%	59	$84,325
Gewurztraminer	98			98						30	23%	127	$89,758
Pinot Gris/Grigio	163			163			$200,193	$1,228	4%	304	65%	467	$573,509
Riesling	4,049		23	3,787	206	33	$4,260,229	$1,052	2%	2,324		6,373	$6,705,875
Sauvignon Blanc										53	100%	53	$56,322
Semillon	371		152	220			$226,691	$611	-19%	138	27%	510	$311,192
Vermentino	15			15							0%	15	$17,358
Viognier	7			7						88	93%	95	$99,519
Other white										61	100%	61	$90,446
White total	**5,384**		**336**	**4,802**	**213**	**33**	**$5,279,793**	**$981**	**1%**	**3,389**	**39%**	**8,773**	**$8,744,578**
Grand total	**13,558**		**336**	**11,933**	**991**	**299**	**$15,645,567**	**$1,154**	**0%**	**9,603**	**41%**	**23,161**	**$27,011,097**

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

Clare Valley

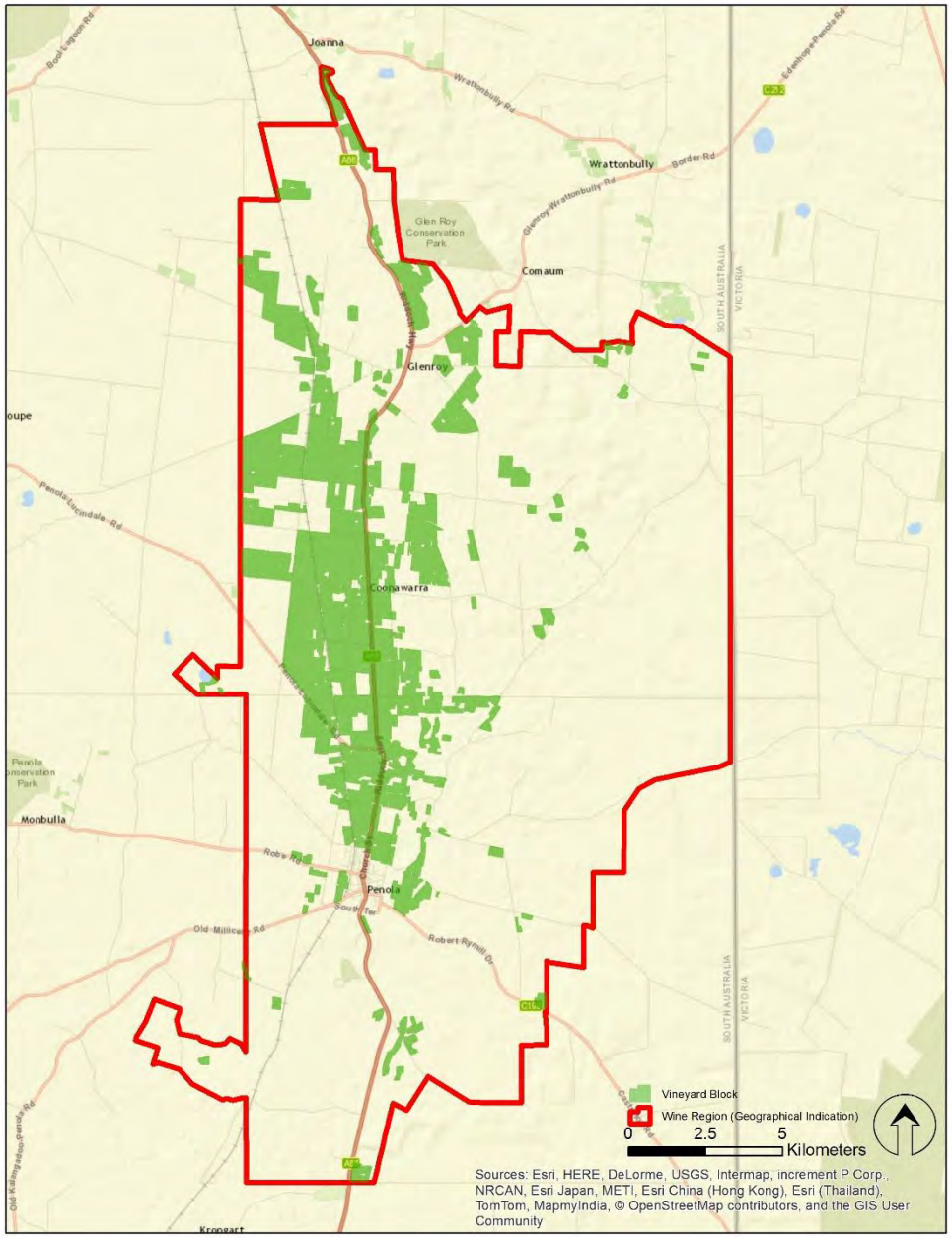
Historical weighted average price vs tonnes crushed

Clare Valley

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Franc	15	0	0	0	15	0%
Cabernet Sauvignon	1,121	3	1	9	1,135	1%
Grenache	59	0	0	0	59	0%
Malbec	76	0	0	3	79	3%
Mataro (Mourvedre)	33	2	1	1	37	2%
Merlot	266	0	0	0	266	0%
Sangiovese	25	0	0	0	25	0%
Shiraz	1,832	25	12	17	1,886	1%
Tempranillo	32	2	0	0	33	0%
Other red	35	1	1	4	42	10%
Total red varieties	**3,493**	**33**	**14**	**34**	**3,575**	**1%**
White winegrapes						
Chardonnay	172	0	0	0	172	0%
Pinot Gris	46	2	0	0	48	0%
Riesling	1,000	5	48	4	1,056	0%
Sauvignon Blanc	20	0	0	0	20	0%
Semillon	116	0	0	0	116	0%
Traminer (Gewurztraminer)	15	0	0	0	15	0%
Viognier	13	0	0	0	13	0%
Other white	30	1	0	2	33	6%
Total white varieties	**1,411**	**8**	**48**	**6**	**1,472**	**0%**
Unknown variety	11	0	0	0	11	0%
Rootstock Block	1	0	0	0	1	0%
Total all varieties	**4,917**	**41**	**62**	**40**	**5,060**	**1%**

Source: Vinehealth Australia



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

Vinehealth AUSTRALIA

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SA Winegrape Crush Survey

Regional Summary Report 2018

Coonawarra Wine Region

Wine Australia August 2018

Coonawarra

Vintage overview

VINTAGE REPORT

The 2018 Coonawarra vintage generally delivered superb conditions, leading to fruit of outstanding quality being harvested.

The winter and spring rainfall leading into the 2018 season was excellent at 20% above long-term averages, soil moisture was replenished, and aquifers recharged. Winter was cold delivering a good dormancy.

An unusual single black frost on the 4th November damaged vines throughout the Limestone Coast, and reduced yields in some of the northern vineyards of Coonawarra.

October through December was two degrees warmer than average, but without peak temperatures causing issues, this advanced flowering by three days (24th November, 80% capfall) compared to regional long-term phenology. The flowering to fruit set period was quick, assisting in good berry numbers.

The berry development and ripening period from December to mid-April was very dry, delivering only 50mm, which is half the normal rainfall. Consequently, there was no disease pressure.

The warm summer temperatures advanced veraison by two weeks, to the end of January then a strong “Bonney“ coastal upwelling cooled March, and extended the ripening period such that Cabernet was harvested in line with long term harvest dates (early April) predominantly from the last week of March through the first two weeks of April.

The yields were moderate, and the slow cool ripening was very even, delivering fruit with fine tannins and strong varietal flavours.

Pete Balnaves, President, Coonawarra Grape & Wine Incorporated

OVERVIEW OF VINTAGE STATISTICS

A total of 29,692 tonnes of Coonawarra winegrapes was crushed in 2018 – 19% less than the 36,509 tonnes crushed in 2017.

Over the past five years (2013-2017), the average crush of Coonawarra winegrapes has been 31,385 tonnes, making the 2018 crush 5% below the average. The 2017 harvest was the largest since 2008, while the smallest in the period was 23,480 tonnes in 2014.

Despite the lower tonnage, the total estimated value of winegrapes increased from $41 million to $45 million due to significant increases in average prices for all the major varieties. Cabernet Sauvignon, which accounts for 63% of Coonawarra’s crush, increased by 51% to $1765 per tonne and Shiraz increased by 17% to $1418 per tonne.

The price dispersion data shows a dramatic upward shift in the dispersion of Cabernet Sauvignon purchase prices. Last year, 24% was purchased at $1500 or above, whereas this year 60% of purchases fell into this range. 98% of white varieties were purchased at between $600 and $1500 in 2018, with 2% purchased at below $600, whereas last year 21% was purchased at below $600.

There were just 9 hectares of new vines planted in Coonawarra in the 2017 growing season, after 5 hectares the previous year but 101 the year before. The total area planted in Coonawarra declined by 9 hectares to 5818 hectares. This is around 130 hectares higher than it was five years ago (5686 hectares in 2013).

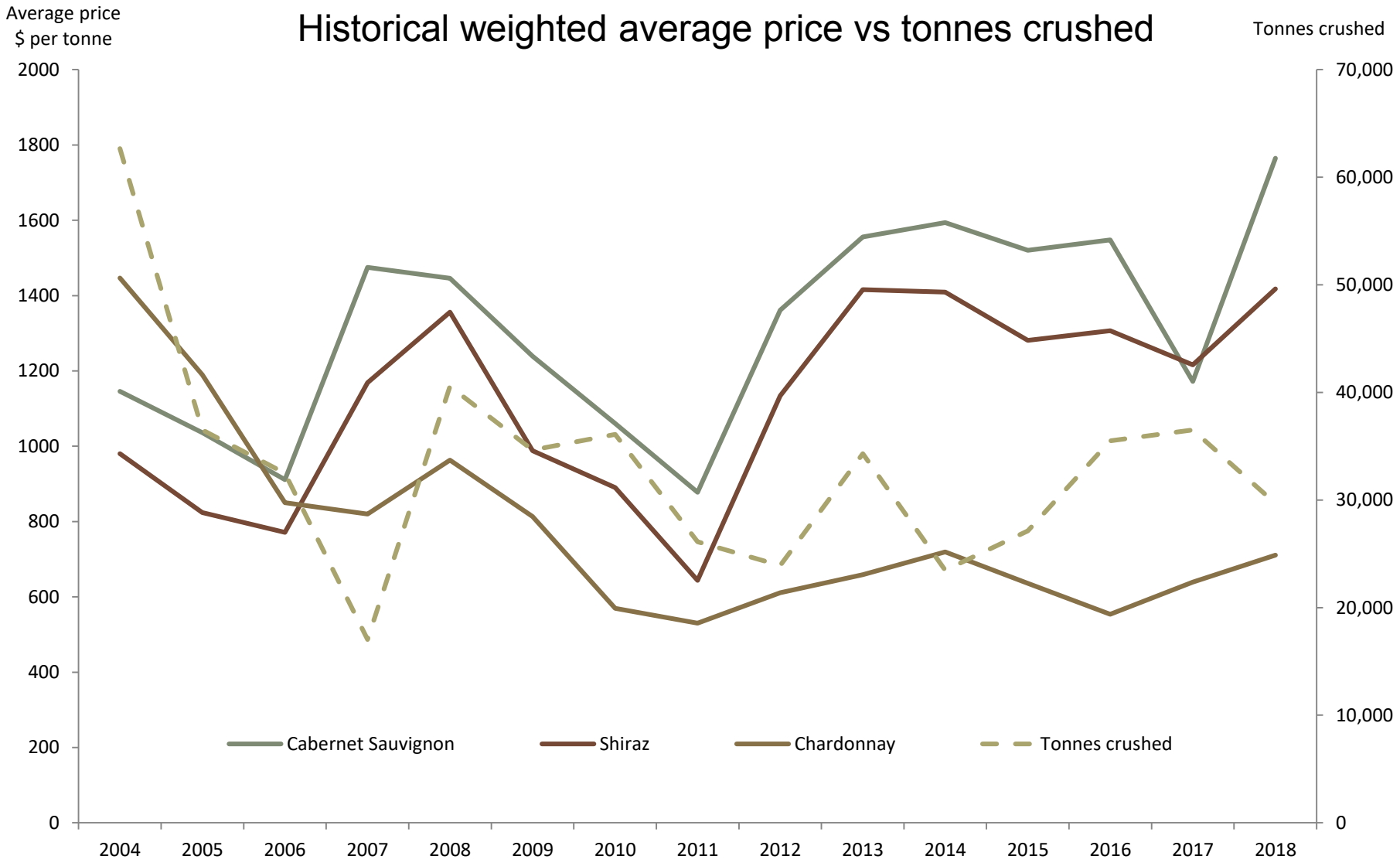
Coonawarra

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													
Barbera										7	100%	7	$7,752
Cabernet Franc	10			8	2					70	87%	80	$97,312
Cabernet Sauvignon	6,528			2,596	2,538	1,394	$11,519,738	$1,765	51%	12,213	65%	18,741	$33,072,302
Lagrein	13			13							0%	13	$15,096
Malbec	14				14					105	88%	119	$236,056
Merlot	463			447		15	$447,683	$968	0%	1,290	74%	1,753	$1,696,407
Montepulciano	5			5							0%	5	$6,204
Petit Verdot	23			23						335	94%	358	$286,432
Pinot Meunier										16	100%	16	$24,636
Pinot Noir	43			43						145	77%	188	$178,790
Shiraz	850		22	479	281	68	$1,205,034	$1,418	17%	3,908	82%	4,758	$6,746,755
Other red	3				3					0	11%	3	$5,920
Red total	**7,951**		**22**	**3,615**	**2,838**	**1,477**	**$13,298,977**	**$1,673**	**43%**	**18,091**	**69%**	**26,042**	**$42,373,661**
White													
Chardonnay	472			472			$336,155	$711	11%	1,458	76%	1,931	$1,373,584
Gewurztraminer										27	100%	27	$22,803
Pinot Gris/Grigio	15			15						16	51%	31	$37,536
Riesling	36			36						383	92%	418	$384,023
Sauvignon Blanc	262		20	241			$217,839	$833	9%	790	75%	1,052	$875,777
Semillon	21			21						144	87%	166	$162,298
Viognier	1			1						4	79%	5	$4,690
Other white										21	100%	21	$30,967
White total	**807**		**20**	**787**			**$626,734**	**$777**	**8%**	**2,843**	**78%**	**3,650**	**$2,891,678**
Grand total	**8,758**		**42**	**4,401**	**2,838**	**1,477**	**$13,925,711**	**$1,590**	**41%**	**20,934**	**71%**	**29,692**	**$45,265,339**

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
Average price
$ per tonne
Tonnes crushed
2000
1800
1600
1400
1200
1000
800
600
400
200
0
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
Cabernet Sauvignon
Shiraz
Chardonnay
Tonnes crushed

Coonawarra

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Franc	28	0	1	1	30	3%
Cabernet Sauvignon	3,593	60	3	9	3,665	0%
Malbec	18	0	0	0	18	0%
Merlot	359	2	1	0	362	0%
Petit Verdot	17	0	0	0	17	0%
Pinot Noir	42	0	0	0	42	0%
Shiraz	1,176	39	0	0	1,214	0%
Other red	7	0	0	0	7	0%
Total red varieties	**5,239**	**101**	**5**	**9**	**5,354**	**0%**
White winegrapes						
Chardonnay	273	0	0	0	273	0%
Riesling	72	0	0	0	72	0%
Sauvignon Blanc	97	0	0	0	97	0%
Semillon	12	0	0	0	12	0%
Other white	11	0	0	0	11	0%
Total white varieties	**464**	**0**	**0**	**0**	**464**	**0%**
Total all varieties	**5,703**	**101**	**5**	**9**	**5,818**	**0%**

Source: Vinehealth Australia

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

Currency Creek Wine Region

Vinehealth AUSTRALIA

SA Winegrape Crush Survey

Regional Summary Report 2018

Currency Creek Wine Region

Wine Australia August 2018

Currency Creek

Vintage overview

VINTAGE REPORT

After a variable start to bud burst and the season providing many disease challenges during the growing period and around veraison, a stretch of about four weeks of ideal ripening weather in the middle of vintage saved the season at Currency Creek.

Good late winter rainfall created ideal opening sub-soil moisture, a situation that prevailed during the whole growing season. Shoot length was short during the early part of the season due to cooler than average temperatures but caught up later in the season.

The weather conditions at flowering were variable but allowed good fruit set in most red varieties as well as Sauvignon Blanc and Pinot Gris. Chardonnay was the big loser with very poor set leading to severely reduced yields.

Disease pressure throughout the season was high, resulting in double the normal number of fungicides being applied, and harvest was three weeks later than average.

Whites benefited from the cooler climatic conditions and maritime influence of the Currency Creek region, with good fruit ripeness and naturally balanced acidity.

The reds were left hanging to gain full physiological maturity and were picked very late this year, with first fruit coming in from about 10th April and a compressed harvest program completed by 3rd May. Such prolonged hang time resulted in great varietal character and colour and red variety yields were generally as expected.

David Watkins, Currency Creek Wine Region Association

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Currency Creek in 2018 was 5,711 tonnes, 44% down on the 2017 harvest of 9,211 tonnes. (NB year-on-year comparisons in smaller regions can be distorted by changes in the respondent group.)

Over the past five years, the average crush for the region has been 8,855 tonnes. The 2018 crush was 42% lower than the average and the lowest for at least 10 years.

The estimated total value of fruit from the region was $4.7 million, compared with $7 million in 2017, as a result of the lower tonnes crushed being partially offset by increases in average prices. Average prices for the two main varieties both increased significantly – Cabernet Sauvignon up by 32% to $1036 per tonne and Shiraz up by 20% to $1006 per tonne.

The price dispersion data shows that 96% of all purchased fruit from the region was purchased at $600 or above, compared with 80% last year.

There were no new plantings recorded in the region for the third year in a row. Total plantings are 974 hectares, three-quarters of which are red varieties. There has been little change in plantings in the past five years; the total planted area in Currency Creek in 2013 was 960 hectares.

Currency Creek

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 Sauvignon	364			364			$377,672	$1,036	32%	879	71%	1,243	$1,288,487
Durif										75	100%	75	$87,307
Grenache										41	100%	41	$67,512
Lagrein	17			17							0%	17	$23,688
Malbec										49	100%	49	$55,635
Merlot	26			26						232	90%	258	$232,155
Petit Verdot										35	100%	35	$34,366
Pinot Noir										30	100%	30	$51,000
Sangiovese	49			49			$63,772	$1,311			0%	49	$63,772
Shiraz	833			833			$837,470	$1,006	20%	581	41%	1,414	$1,421,555
Tempranillo	40			40							0%	40	$55,300
Red total	**1,328**			**1,328**			**$1,380,996**	**$1,040**	**27%**	**1,923**	**59%**	**3,251**	**$3,380,776**
White													
Chardonnay	68		63	5						949	93%	1,017	$526,989
Gewurztraminer										114	100%	114	$96,585
Pinot Gris/Grigio	50			50						423	90%	472	$482,335
Prosecco	19			19							0%	19	$25,298
Sauvignon Blanc	85			85						180	68%	265	$159,018
Vermentino	38			38							0%	38	$51,356
White total	**260**		**63**	**197**			**$213,526**	**$822**	**19%**	**1,666**	**87%**	**1,926**	**$1,341,581**
Grand total	**1,588**		**63**	**1,525**			**$1,594,522**	**$1,004**	**26%**	**3,589**	**69%**	**5,177**	**$4,722,357**

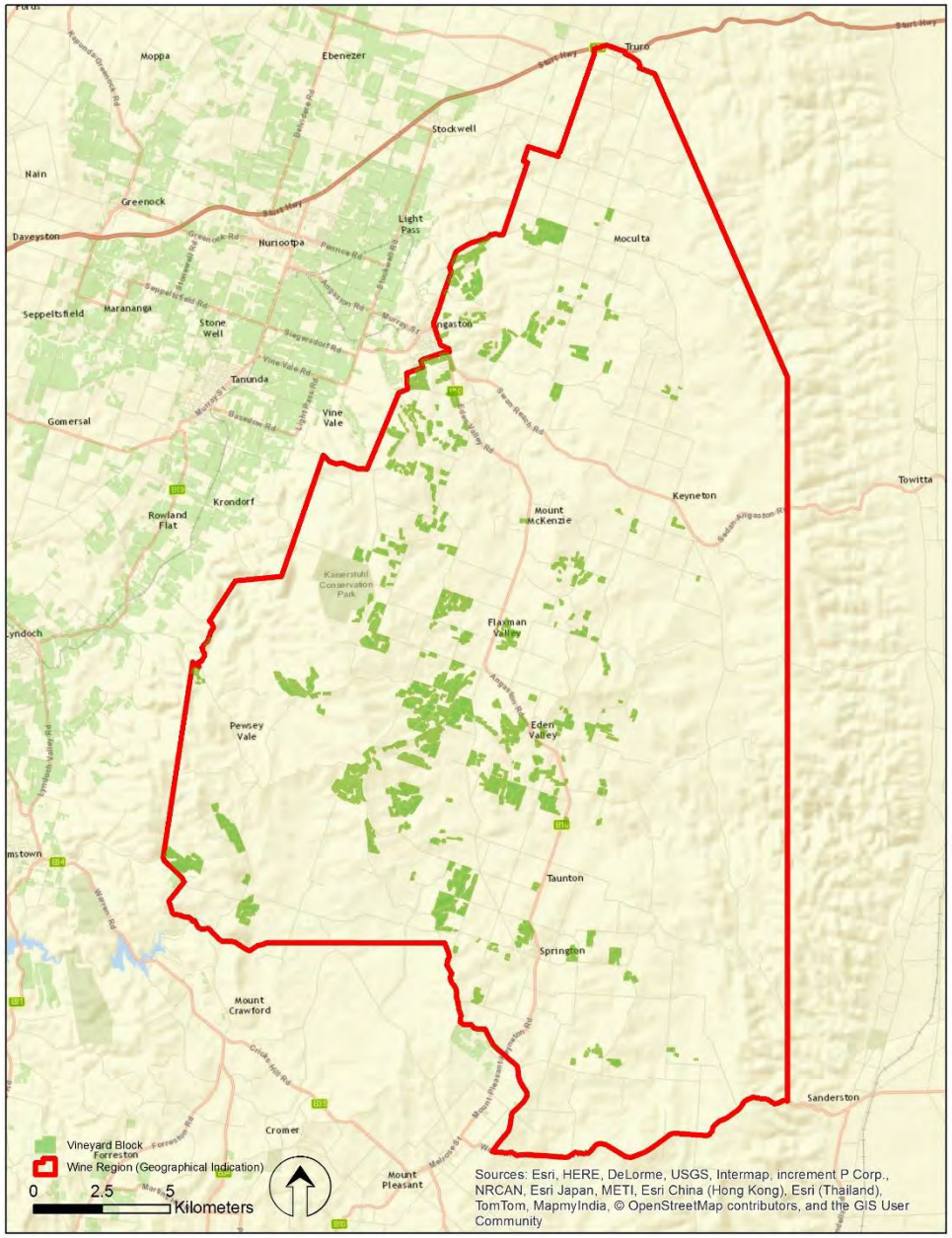
Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Currency Creek

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Sauvignon	291	0	0	0	291	0%
Grenache	11	0	0	0	11	0%
Merlot	61	0	0	0	61	0%
Pinot Noir	11	0	0	0	11	0%
Sangiovese	4	0	0	0	4	0%
Shiraz	336	0	0	0	336	0%
Other red	26	0	0	0	26	0%
Total red varieties	**740**	**0**	**0**	**0**	**740**	**0%**
White winegrapes						
Chardonnay	111	0	0	0	111	0%
Pinot Gris	31	0	0	0	31	0%
Sauvignon Blanc	56	0	0	0	56	0%
Semillon	8	0	0	0	8	0%
Viognier	6	0	0	0	6	0%
Other white	20	0	0	0	20	0%
Total white varieties	**232**	**0**	**0**	**0**	**232**	**0%**
Unknown variety	2	0	0	0	2	0%
Total all varieties	**974**	**0**	**0**	**0**	**974**	**0%**

Source: Vinehealth Australia



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

Eden Valley Wine Region

Vinehealth AUSTRALIA

SA Winegrape Crush Survey

Regional Summary Report 2018

Eden Valley Wine Region

Wine Australia August 2018

Eden Valley

Vintage overview

VINTAGE REPORT

The 2018 vintage in Eden Valley will be one to savour.

“Flavours and colours in reds are wonderful, and natural acids in the Eden Valley whites surprisingly high, with early standout varieties this year including Riesling, Chardonnay, Shiraz, Grenache and Cabernet”, said Yalumba head of winemaking Louisa Rose.

The growing season started off well, with Winter 2017 rainfall around 10% higher than average. Spring rainfall was only slightly below average (98%) in Eden Valley, with December rainfall 88%. Eden Valley fared better than Barossa Valley, where December rainfall was only 57% of average.

Drier soils, combined with warmer than average October and November days meant the vine canopies grew quickly; flowering well and setting a good number of bunches.

January and February were warm and dry, with very warm temperatures in February slowing down the pace of ripening.

Eden Valley Shiraz and Cabernet Sauvignon continued to be harvested throughout April. The 28-30mm of rain on 14/15 April did not cause any major problems for picking – and will be a welcome post-harvest watering for most Barossa growers.

Nicki Robins, Barossa Grape & Wine Association

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Eden Valley in 2018 was 11,593 tonnes, 3% lower than the 2017 harvest of 11,975 tonnes.

The five-year average crush for Eden Valley from 2013-2017 is 9,577 tonnes, making the 2018 harvest 21% above the average and the second highest since 2011.

The estimated value of fruit from the region in 2018 was just under $22 million, very similar to last year, reflecting the combination of a slightly lower tonnage and a small increase in the region’s overall average grape value. There were increases for all the top four varieties: Shiraz up 11% to $2636 per tonne, Cabernet Sauvignon up 15% to $2354 per tonne, Riesling up 2% to $1605 per tonne and Chardonnay up 3% to $1243 per tonne.

The price dispersion data shows that nearly 60% of red tonnages were purchased at $2000+ per tonne, and in the whites, 29% were purchased between $1500 and $2000 and 7% at above $2000. This distribution is very similar to last year’s.

There were just 5 hectares of new plantings in Eden Valley in the 2017 planting season, compared with 42 in 2016. The total planted area as at 30 April 2018 was 2,335 hectares, very slightly lower than the 2,346 hectares in 2017, and 3% higher than it was in 2013 (2,261 hectares).

Eden Valley

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	17					17				11	39%	28	$62,942
Cabernet Sauvignon	566				176	390	$1,332,451	$2,354	15%	813	59%	1,379	$3,246,117
Grenache	27				7	20	$73,257	$2,734	30%	9	25%	36	$98,055
Mataro/Mourvedre	7				4	3				34	83%	41	$97,976
Merlot	205			123	82		$259,248	$1,264	-6%	82	28%	287	$362,376
Montepulciano										11	100%	11	$20,615
Nero d'Avola	2				2						0%	2	$4,072
Petit Verdot	14					14				40	74%	54	$107,160
Pinot Noir	190			180	10		$223,940	$1,181	-3%	78	29%	268	$316,378
Shiraz	1,858				544	1,313	$4,898,848	$2,636	11%	1,536	45%	3,394	$8,947,777
Tempranillo	49			7	42		$77,350	$1,587		22	31%	71	$112,668
Other red	5			5						7	56%	12	$12,674
Red total	**2,939**			**315**	**867**	**1,756**	**$6,956,640**	**$2,367**	**9%**	**2,642**	**47%**	**5,582**	**$13,388,809**
White													
Chardonnay	613			453	160		$762,606	$1,243	3%	817	57%	1,431	$1,778,550
Gewurztraminer	47			47						30	40%	77	$89,192
Muscat Blanc a Petits Grains	29			24	5		$26,614	$912	-3%	1	3%	30	$27,325
Pinot Gris/Grigio	120			116	4		$154,810	$1,292	0%	141	54%	261	$336,500
Riesling	1,212			580	466	166	$1,945,385	$1,605	2%	1,921	61%	3,134	$5,028,655
Roussanne	54			54						11	17%	65	$88,223
Sauvignon Blanc	125			125			$113,069	$904	-9%	213	63%	338	$305,537
Semillon	163		8	154			$118,817	$731	-3%	42		205	$149,801
Viognier	182		19	40	113	11	$287,397	$1,576	-6%	183	50%	365	$575,761
Other white	17			17						89	84%	106	$143,586
White total	**2,563**		**27**	**1,611**	**748**	**177**	**$3,559,133**	**$1,389**	**3%**	**3,449**	**57%**	**6,012**	**$8,523,130**
Grand total	**5,502**		**27**	**1,926**	**1,615**	**1,934**	**$10,515,773**	**$1,911**	**8%**	**6,091**	**53%**	**11,593**	**$21,911,939**

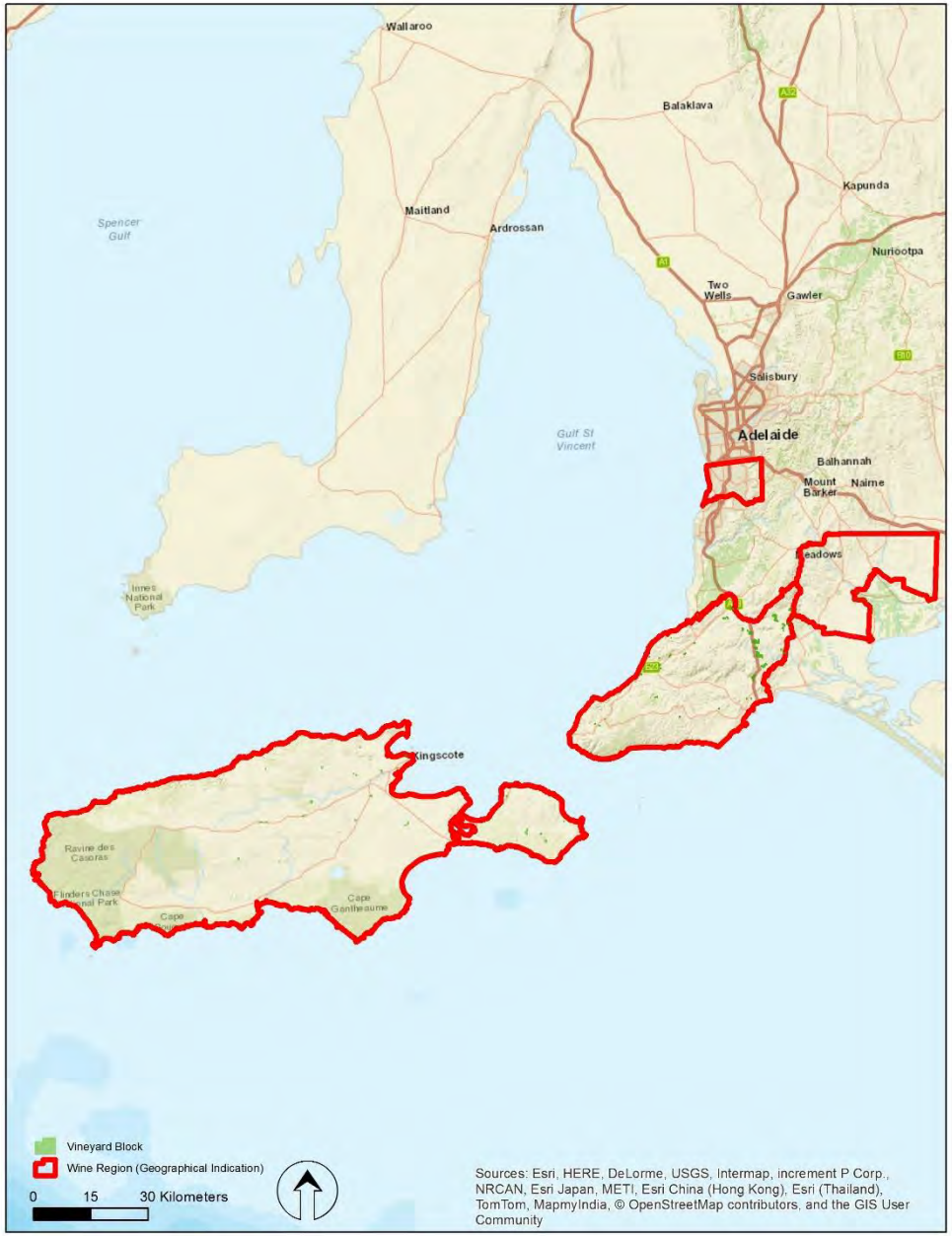
Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Eden Valley

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	324	2	14	0	340	0%
Grenache	20	0	0	0	20	0%
Mataro (Mourvedre)	16	0	0	0	16	0%
Merlot	68	0	0	0	68	0%
Petit Verdot	7	0	0	0	7	0%
Pinot Noir	59	1	0	3	63	4%
Shiraz	742	1	27	3	773	0%
Tempranillo	9	0	0	0	9	0%
Other red	13	0	0	0	13	0%
Total red varieties	**1,262**	**4**	**42**	**5**	**1,313**	**0%**
White winegrapes						
Chardonnay	257	7	0	0	264	0%
Muscat A Petit Grains Blanc (White Frontignac)	7	0	0	0	7	0%
Pinot Gris	36	0	0	0	36	0%
Riesling	539	2	0	0	541	0%
Sauvignon Blanc	54	0	0	0	54	0%
Semillon	24	0	0	0	24	0%
Traminer (Gewurztraminer)	17	0	0	0	17	0%
Viognier	42	0	0	0	42	0%
Other white	21	1	0	0	22	0%
Total white varieties	**998**	**10**	**0**	**0**	**1,008**	**0%**
Unknown variety	14	0	0	0	14	0%
Total all varieties	**2,274**	**14**	**42**	**5**	**2,335**	**0%**

Source: Vinehealth Australia



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

Southern Fleurieu, Kangaroo Island Wine Regions and Fleurieu other

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SA Winegrape Crush Survey

Regional Summary Report 2018

Fleurieu Zone – other

Wine Australia August 2018

Fleurieu zone - other

Vintage overview

Fleurieu zone (other) includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are near but outside the larger GI regions of Currency Creek, McLaren Vale and Langhorne Creek. The total area of vines included in this definition is 852 hectares.

OVERVIEW OF VINTAGE STATISTICS

The harvest from the Fleurieu zone - other areas was 4,200 tonnes in 2018, a 34% increase on the 3,053 tonnes crushed in 2017 and the highest since 2008.

Over the past five years, the average crush across Fleurieu zone – other has been 3,105 tonnes. The 2018 crush was 35% above the average. The minimum crush over the period was 2,831 tonnes in 2013.

The total estimated value of grapes from Fleurieu zone - other in 2018 was $3.7 million, compared with $2.8 million in 2017. This was a result of the higher tonnage combined with higher average prices for most varieties. The average purchase price for Shiraz increased by 16% to $1037 per tonne, while Cabernet Sauvignon increased by 13% to $1,213 per tonne. These increases reversed similar sized decreases last year.

On the other hand, Chardonnay declined by 15% to $528 per tonne and Sauvignon Blanc decreased by 9% to $700 per tonne.

The price dispersion data shows that 2% of red grapes were purchased at below $600 per tonne compared with 5% in 2017 – an upward shift in the price dispersion since last year. Conversely, for white varieties 37% were purchased at below $600 per tonne compared with 24% in 2017.

There have been no reported new plantings in Southern Fleurieu, Kangaroo Island, or elsewhere in Fleurieu zone – other for the past three years. The total area as at April 30, 2018 is 852 hectares – 90 hectares less than at the same time last year, and 120 hectares less than in 2013.

Fleurieu zone - other

Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< $300	$300 to <$600	$600 to <$1500	$1500 to <$2000	$2000+							
Red													
Cabernet Franc	5					5				10	66%	15	$33,365
Cabernet Sauvignon	277			260		17	$336,060	$1,213	13%	156	36%	433	$525,522
Grenache										7	100%	7	$2,881
Malbec	5			5						8	64%	13	$12,940
Merlot	68		25	43						77	53%	145	$105,091
Pinot Noir	126			105		22				8	6%	135	$169,501
Sangiovese										15	100%	15	$5,936
Shiraz	1,260		4	1,204	10	42	$1,305,700	$1,037	16%	165	12%	1,425	$1,477,247
Tempranillo	3					3				1	31%	5	$12,690
Red total	**1,744**		**29**	**1,616**	**10**	**89**	**$1,874,830**	**$1,075**	**12%**	**449**	**20%**	**2,193**	**$2,345,172**
White													
Chardonnay	509		383	126			$268,684	$528	-15%	85	14%	594	$313,614
Pinot Gris/Grigio	397			397						262	40%	659	$559,929
Riesling										5	100%	5	$1,644
Sauvignon Blanc	307		27	275	5		$214,757	$700	-9%	380	55%	687	$480,835
Semillon	54		54							7	11%	61	$24,356
Viognier										1	100%	1	$798
White total	**1,266**		**463**	**798**	**5**		**$842,098**	**$665**	**-7%**	**741**	**37%**	**2,007**	**$1,381,175**
Grand total	**3,010**		**492**	**2,415**	**14**	**89**	**$2,716,928**	**$902**	**5%**	**1,189**	**28%**	**4,200**	**$3,726,347**

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

Fleurieu zone - other

Current plantings by variety and year planted

Southern Fleurieu

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red						
Cabernet Sauvignon	70	0	0	0	70	0%
Merlot	36	0	0	0	36	0%
Other red	4	0	0	0	4	0%
Pinot Noir	30	0	0	0	30	0%
Shiraz	124	0	0	0	124	0%
Total red varieties	**264**	**0**	**0**	**0**	**264**	**0%**
White						
Chardonnay	88	0	0	0	88	0%
Other white	5	0	0	0	5	0%
Pinot Gris	25	0	0	0	25	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	69	0	0	0	69	0%
Semillon	22	0	0	0	22	0%
Viognier	9	0	0	0	9	0%
Total white varieties	**221**	**0**	**0**	**0**	**221**	**0%**
Unknown variety	3	0	0	0	3	0%
Total all varieties	**488**	**0**	**0**	**0**	**488**	**0%**

Source: Vinehealth Australia

Fleurieu zone - other

Current plantings by variety and year planted

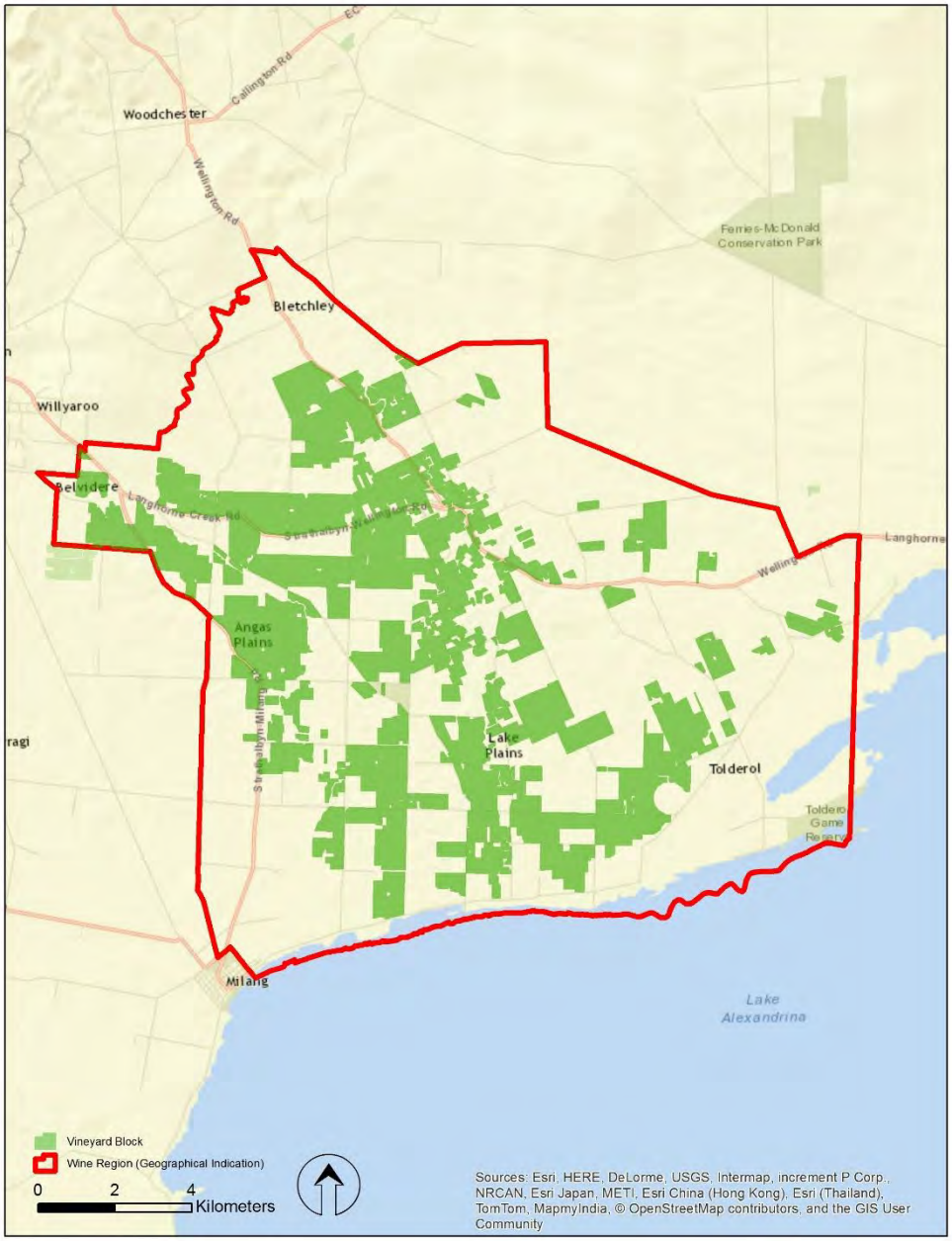
Kangaroo Island

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
			Year planted			
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	41	0	0	0	42	1%
Merlot	5	0	0	0	5	0%
Other red	7	0	0	0	7	0%
Shiraz	48	0	0	0	48	0%
Chardonnay	8	0	0	0	8	0%
Other white	4	0	0	0	4	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	7	0	0	0	7	0%
Unknown variety	5	0	0	0	5	0%
Total all varieties	**134**	**0**	**0**	**0**	**134**	**0%**

Fleurieu zone (other)

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
Cabernet Sauvignon	34	0	0	0	34	0%
Shiraz	92	0	0	0	92	0%
Other red	4	0	0	0	4	0%
Chardonnay	29	0	0	0	29	0%
Pinot Gris	16	0	0	0	16	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other white	6	0	0	0	6	0%
Unknown variety	36	0	0	0	36	0%
Total all varieties	**230**	**0**	**0**	**0**	**230**	**0%**

Source: Vinehealth Australia



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DATE: 3rd August 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Langhorne Creek Wine Region

Vinehealth AUSTRALIA

SA Winegrape Crush Survey

Regional Summary Report 2018

Langhorne Creek Wine Region

Wine Australia August 2018

Langhorne Creek

Vintage overview

VINTAGE REPORT

Above average winter rains ahead of a dry and warmer than average summer resulted in solid vintage conditions for Langhorne Creek in 2018.

Winter rainfall was above average, leading to a number of floods through the older floodplain vineyards.

Spring rainfall quickly tapered back to around average, but a windy season kept canopies dry and helped to check excessive growth.

Summer rainfall was relatively low keeping disease pressure under control, but a couple of good falls from November through to January assisted with canopy maintenance. Temperatures were higher than average, with a number of short heatwaves across South Australia, but Langhorne Creek vines suffered only a little, receiving welcome relief thanks to the reliable cooling southerly breezes most evenings during the summer and autumn ripening periods.

Harvest began in the region in the first week of February with fruit destined for sparkling base. It was a classic vintage for white wine grape varieties in Langhorne Creek with cool nights resulting in good acidity and bright fruit flavours.

Langhorne Creek red harvesting commenced in earnest in early March. Much of the harvest was completed in the week prior to Easter, however harvest continued after this for companies seeking fuller bodied wines.

Overall an excellent vintage for wine quality; the wines are more fruit-focussed than floral, with excellent tannins and palate. Cabernet Sauvignon has put in a particularly strong performance with moderate yields and excellent quality. Shiraz quality and quantity is very good and the small Malbec harvest slightly above average in quality.

Lian Jaensch and Phil Reilly, Langhorne Creek Wine

OVERVIEW OF VINTAGE STATISTICS

The harvest from the Langhorne Creek region in 2018 was 44,695 tonnes, 24% down on the 2017 harvest of 59,059 tonnes.

Over the past five years, the average crush for Langhorne Creek has been 50,750 tonnes. The highest was 60,119 tonnes in 2016, while the lowest was 38,921 tonnes in 2015. This year's vintage was 12% below the average.

The value of fruit from the region was estimated to be just over $40 million, compared with $47 million in 2017, with the lower tonnages partially offset by a higher overall average purchase value. All the major red varieties increased in value, with Cabernet Sauvignon up 29% to $973 per tonne and Shiraz up 18% to $1040 per tonne. The average prices for both varieties are now at their highest since 2008. Chardonnay also increased – up 6% to $553 per tonne, but Pinot Gris decreased 3% to $941 per tonne.

The price dispersion data shows an upward shift in red prices, with 99.5% of red tonnages purchased at $600 per tonne or higher, compared with 92% in 2017. Conversely, for the whites, 40% were purchased at $600 per tonne or above, compared with 47% in 2017.

There were just 9 hectares of new plantings in Langhorne Creek in the 2017 planting season, compared with 28 hectares the previous year.

The total area planted as at 30 April 2018 was 5,936 hectares compared with 5,895 hectares five years ago. More than two-thirds of all plantings are Cabernet Sauvignon and Shiraz.

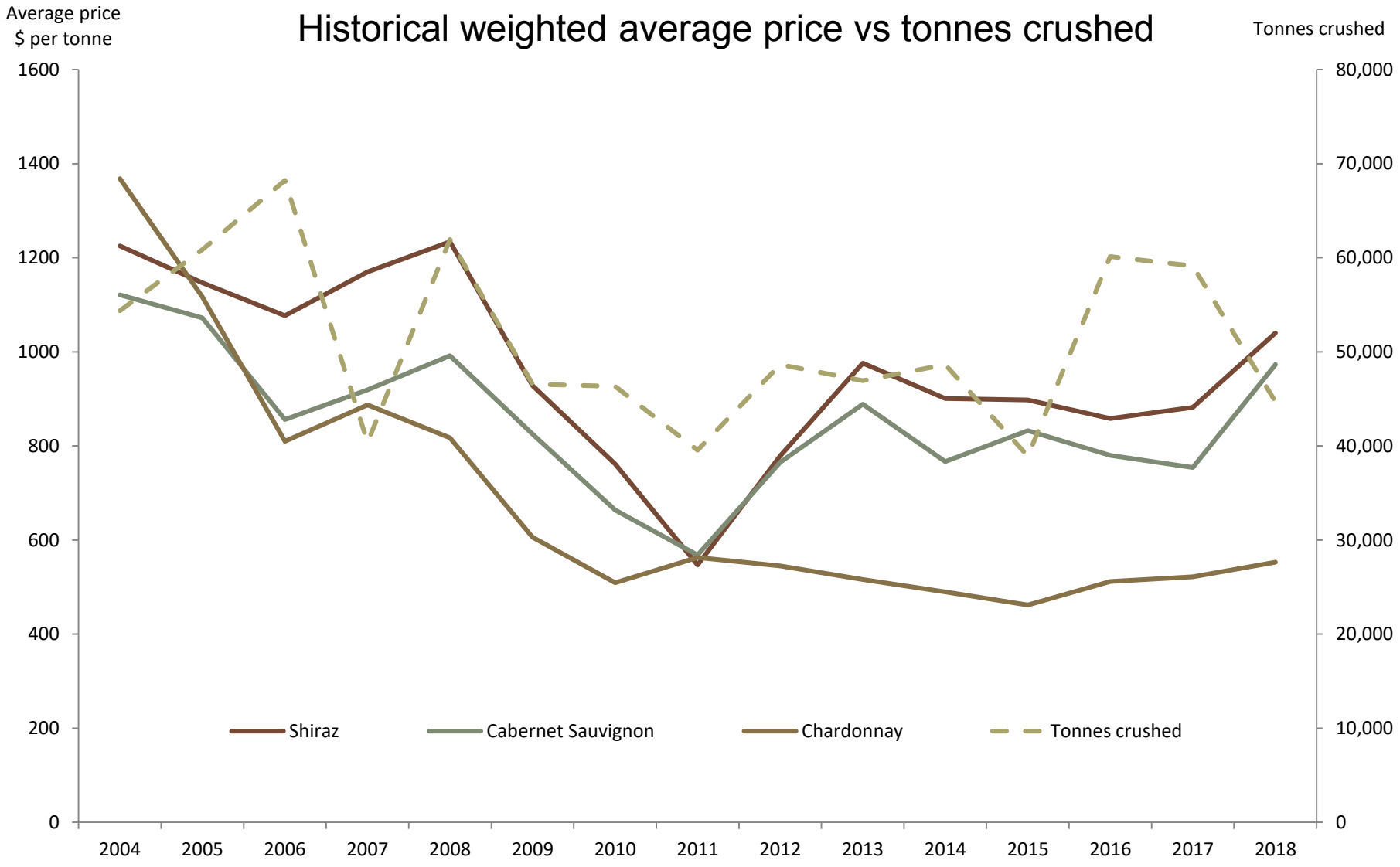
Langhorne Creek

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	5			5							0%	5	$3,168
Cabernet Sauvignon	8,905		18	8,747	44	95	$8,661,801	$973	29%	3,978	31%	12,883	$12,531,585
Dolcetto	19			19						16	45%	35	$28,760
Durif	8			8						124	94%	132	$112,319
Grenache	107			107			$78,432	$734	4%	935	90%	1,042	$765,162
Lagrein	30			30			$30,039	$1,006			0%	30	$30,039
Malbec	303			303			$301,047	$992	5%	79	21%	383	$379,712
Mataro/Mourvedre	6			6						5	47%	10	$10,116
Merlot	2,090			2,090			$1,621,140	$775	11%	1,994	49%	4,085	$3,167,818
Montepulciano										10	100%	10	$18,252
Petit Verdot	7			7						60	90%	67	$40,236
Pinot Meunier	41			41							0%	41	$30,593
Pinot Noir	866			866			$687,650	$794	10%	627	42%	1,493	$1,185,383
Sangiovese										90	100%	90	$106,987
Shiraz	10,040			9,729	96	216	$10,439,763	$1,040	18%	6,036	38%	16,077	$16,716,298
Tempranillo	5			5							0%	5	$5,489
Other red	22			17	4					4	15%	25	$33,446
Red total	**22,454**		**18**	**21,980**	**145**	**311**	**$21,919,911**	**$976**	**21%**	**13,959**	**38%**	**36,413**	**$35,165,362**
White													
Chardonnay	3,868	0	2,899	968			$2,136,996	$553	6%	1,118	22%	4,986	$2,754,692
Fiano	3				3					24	90%	27	$45,900
Gewurztraminer										223	100%	223	$188,373
Muscat Blanc a Petits Grains										13	100%	13	$13,772
Pinot Gris/Grigio	452			452			$425,606	$941	-3%	83	16%	535	$503,884
Riesling	135		135							1,266	90%	1,401	$700,655
Sauvignon Blanc	622			622						339	35%	962	$693,472
Verdelho										80	100%	80	$79,611
Vermentino	5		2	4						7	55%	12	$8,417
Viognier										43	100%	43	$54,016
White total	**5,086**	**0**	**3,036**	**2,046**	**3**		**$3,087,601**	**$607**	**-1%**	**3,196**	**39%**	**8,282**	**$5,042,792**
Grand total	**27,540**	**0**	**3,054**	**24,027**	**147**	**311**	**$25,007,512**	**$908**	**17%**	**17,156**	**38%**	**44,695**	**$40,208,154**

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

Langhorne Creek



Langhorne Creek

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Franc	8	0	0	0	9	5%
Cabernet Sauvignon	1,888	2	8	4	1,902	0%
Dolcetto	11	0	0	0	11	0%
Grenache	78	0	0	0	78	0%
Lagrein	10	0	0	0	10	0%
Malbec	96	4	0	0	100	0%
Merlot	390	0	0	0	390	0%
Nebbiolo	8	0	0	0	8	0%
Petit Verdot	13	0	0	0	13	3%
Sangiovese	30	0	0	0	30	0%
Shiraz	2,229	5	11	2	2,246	0%
Other red	141	5	5	1	153	1%
Total red varieties	**4,904**	**16**	**24**	**8**	**4,952**	**0%**
White winegrapes						
Chardonnay	535	0	0	0	535	0%
Pinot Gris	49	5	4	0	58	0%
Riesling	162	0	0	0	162	0%
Sauvignon Blanc	80	0	0	0	80	0%
Semillon	4	0	0	0	4	0%
Verdelho	37	0	0	0	37	0%
Viognier	19	0	0	0	19	0%
Other white	34	0	0	0	34	0%
Total white varieties	**919**	**5**	**4**	**0**	**928**	**0%**
Rootstock Block	6	0	0	0	6	0%
Unknown variety	50	0	0	0	50	0%
Total all varieties	**5,879**	**21**	**28**	**9**	**5,936**	**0%**

Source: Vinehealth Australia

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

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

Vinehealth AUSTRALIA

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SA Winegrape Crush Survey

Regional Summary Report 2018

Limestone Coast Zone – other

Wine Australia August 2018

Limestone Coast zone - other

Vintage overview

Limestone Coast zone (other) includes the GI regions of Mt Benson, Mount Gambier and Robe, and the vineyards around Bordertown, Lucindale, and Beachport, as well as those near but outside the declared GI regions of Padthaway, Coonawarra and Wrattonbully. The total area of vines included in this definition is around 2,094 hectares.

Vintage report – Mount Benson

Mount Benson had an average winter and spring rainfall with a nice dry and calm flowering, leading to the potential for excellent yields. The region was affected by a late season frost which hit in early November with some growers more affected than others. Overall damage was around 20% of the region. We had an above average warm summer with nice dry conditions which kept disease pressure at a minimum and allowed for steady ripening and an early harvest.

Conditions during harvest were excellent, with nice steady warm weather leading to easy ripening and excellent quality. Yields were moderate overall, with some varieties cropping above average and some below average. Sauvignon Blanc and Shiraz are the main standouts for quality this year with other winemakers also particularly happy with Merlot, Cabernet Sauvignon and Pinot Gris. Overall a standout vintage, whites are highly aromatic and attractive with reds showing elegance, finesse and balance.

Anita Goode, President, Mount Benson Vignerons

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from the Limestone Coast zone (other) was 16,478 tonnes, compared with 22,154 tonnes in 2017, a decline of 26%. The 2018 crush was 7% below the five-year average (2013-2017) of 17,687 tonnes. The largest crush in the five-year period was the 2017 crush, while the lowest was 12,728 tonnes in 2014.

The total estimated value of fruit from this area was $15.5 million, down 9% ($1.5 million) from last year's total value of $17 million, due to significant increases in the average prices paid for most varieties.

The average prices of all the major red varieties increased: Shiraz by 39% to $1182 per tonne, Cabernet Sauvignon by 34% to $1056 per tonne and Merlot by 7% to $763 per tonne. These increases more than compensated for declines in 2017. In the white varieties, a decrease in the average price for Chardonnay of 5% per tonne to $647 was offset by an increase of 3% in the average price for Sauvignon Blanc, to $859 per tonne.

The price dispersion data shows an upward shift for red varieties, with 8% of red tonnages purchased at $1500 per tonne or above, compared with 5% in 2017, while for the whites 86% of all fruit was purchased at between $600 and $1500 per tonne – down from 91% in 2017 as more was priced at below $600 per tonne.

There were no changes to the plantings in these regions in the 2017 planting season. As at 30 April 2018, there was a total of 2,094 hectares planted, with the largest area being in Robe (738 hectares).

The variety distributions are quite different between the areas; Robe's leading variety is Cabernet Sauvignon and 70% of all plantings are red, while Mount Gambier has 64% white varieties, with Sauvignon Blanc accounting for 39% of all plantings. Mount Benson has a similar balance of red and white to Robe, but has more Shiraz than Cabernet Sauvignon.

Limestone Coast zone - other

Winegrape intake summary table

Incorporates Mount Benson (2813 tonnes), Mt. Gambier (1134 tonnes), Robe (2879 tonnes) and Limestone Coast zone – other including Bordertown (9652 tonnes)

	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	59		59							117	67%	175	$87,640
Cabernet Sauvignon	2,264			2,084	135	45	$2,391,597	$1,056	34%	1,970	47%	4,234	$4,472,129
Malbec	54			54						76	58%	131	$101,402
Mataro/Mourvedre	265			265			$186,911	$706	1%	214	45%	479	$337,921
Merlot	637		129	507			$485,458	$763	7%	1,576	71%	2,213	$1,687,527
Petit Verdot	183		89	95			$119,916	$654		142	44%	326	$213,014
Pinot Noir	375			375			$397,173	$1,060	1%	336	47%	711	$753,483
Shiraz	2,595			2,287	252	56	$3,067,088	$1,182	39%	1,263	33%	3,858	$4,559,123
Tempranillo										29	100%	29	$43,490
Red total	**6,432**		**277**	**5,667**	**387**	**101**	**$6,719,582**	**$1,045**	**30%**	**5,723**	**47%**	**12,155**	**$12,255,731**
White													
Chardonnay	809		254	555			$523,342	$647	-5%	1,520	65%	2,329	$1,506,512
Marsanne	7			7							0%	7	$4,080
Muscat Blanc a Petits Grains	27			27							0%	27	$23,958
Pinot Gris/Grigio	127			127			$139,886	$1,103		2	2%	129	$142,202
Sauvignon Blanc	1,357		55	1,303			$1,165,721	$859	3%	330	20%	1,687	$1,448,885
Semillon	9		9							136	94%	145	$72,400
White total	**2,336**		**318**	**2,018**			**$1,861,337**	**$797**	**1%**	**1,988**	**46%**	**4,323**	**$3,198,037**
Grand total	**8,767**		**594**	**7,685**	**387**	**101**	**$8,580,919**	**$979**	**22%**	**7,711**	**47%**	**16,478**	**$15,453,768**

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

Current plantings by variety and year planted

Mount Benson

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
	Year planted					
Red winegrapes						
Cabernet Sauvignon	114	0	0	0	114	0%
Merlot	52	0	0	0	52	0%
Pinot Noir	2	0	0	0	2	0%
Shiraz	167	0	4	0	171	0%
Other red	5	0	0	0	5	0%
Total red varieties	**340**	**0**	**4**	**0**	**344**	**0%**
White winegrapes						
Chardonnay	39	0	0	0	39	0%
Pinot Gris	42	0	0	0	42	0%
Sauvignon Blanc	67	0	0	0	67	0%
Other white	17	0	0	0	17	0%
Total white varieties	**164**	**0**	**0**	**0**	**164**	**0%**
Total all varieties	**504**	**0**	**4**	**0**	**508**	**0%**

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

Mount Gambier

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
	Year planted					
Red winegrapes						
Cabernet Sauvignon	10	0	0	0	10	0%
Merlot	1	0	0	0	1	0%
Pinot Noir	79	0	0	0	79	0%
Shiraz	0	0	0	0	0	0%
Other red	0	0	0	0	0	0%
Total red varieties	**90**	**0**	**0**	**0**	**90**	**0%**
White winegrapes						
Chardonnay	42	0	0	0	42	0%
Pinot Gris	14	0	0	0	14	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	98	0	0	0	98	0%
Semillon	1	0	0	0	1	0%
Other white	1	0	0	0	1	0%
Total white varieties	**161**	**0**	**0**	**0**	**161**	**0%**
Total all varieties	**251**	**0**	**0**	**0**	**251**	**0%**

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

Robe

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Sauvignon	235	0	0	0	235	0%
Merlot	58	0	0	0	58	0%
Pinot Noir	46	0	0	0	46	0%
Shiraz	171	0	0	0	171	0%
Other red	5	0	0	0	5	0%
Total red varieties	**515**	**0**	**0**	**0**	**515**	**0%**
White winegrapes						
Chardonnay	76	0	0	0	76	0%
Pinot Gris	15	0	0	0	15	0%
Sauvignon Blanc	43	0	0	0	43	0%
Semillon	12	0	0	0	12	0%
Total white varieties	**147**	**0**	**0**	**0**	**147**	**0%**
Unknown variety	76	0	0	0	76	0%
Total all varieties	**738**	**0**	**0**	**0**	**738**	**0%**

Source: Vinehealth Australia

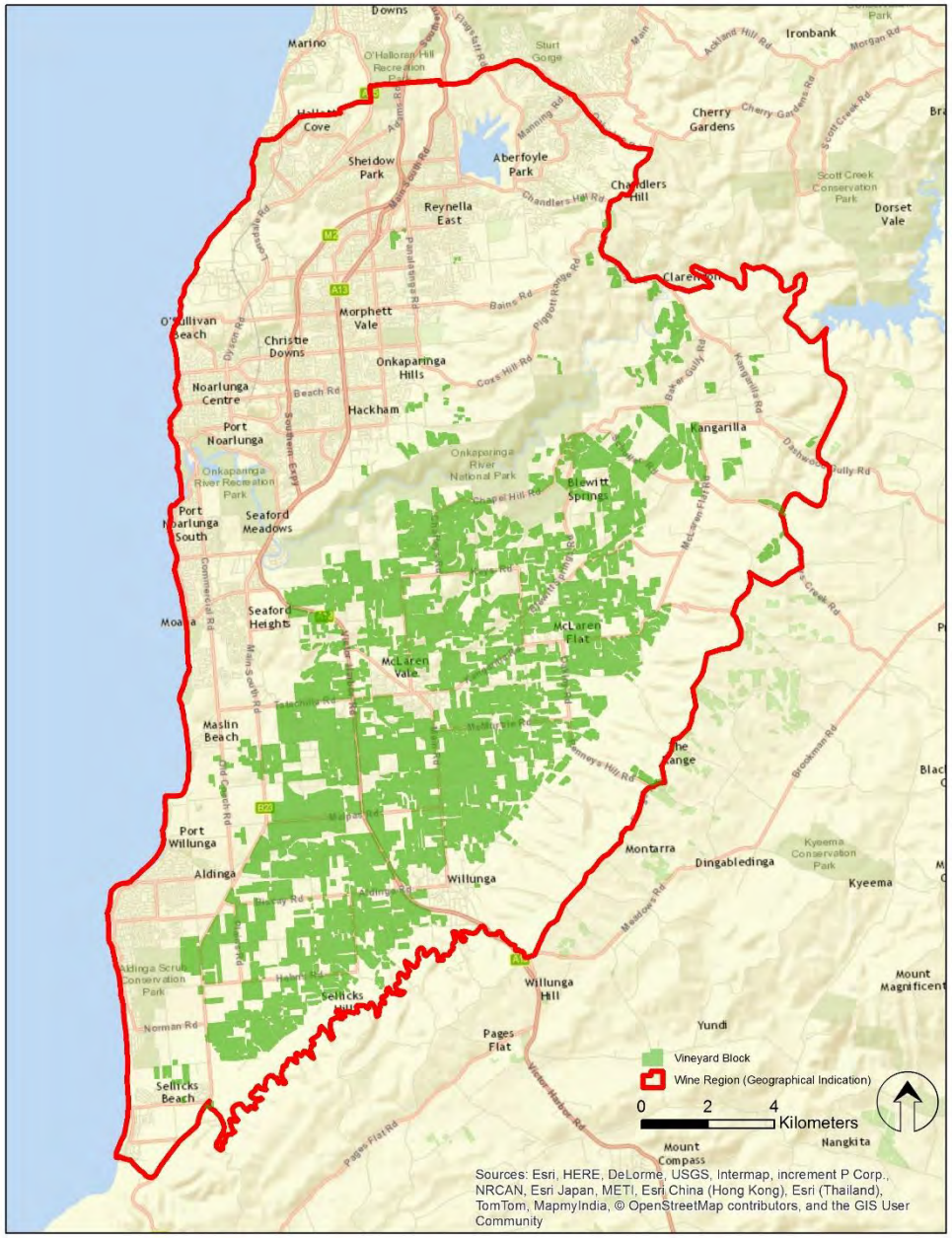
Limestone Coast zone - other

Current plantings by variety and year planted

Limestone Coast zone (other)

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
	Year planted					
Red winegrapes						
Cabernet Sauvignon	344	0	0	0	344	0%
Merlot	45	0	0	0	45	0%
Pinot Noir	10	0	0	0	10	0%
Shiraz	136	0	0	0	136	0%
Other red	5	0	0	0	5	0%
Total red varieties	**540**	**0**	**0**	**0**	**540**	**0%**
White winegrapes						
Chardonnay	41	0	0	0	41	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other white	2	0	0	0	2	0%
Total white varieties	**57**	**0**	**0**	**0**	**57**	**0%**
Total all varieties	**597**	**0**	**0**	**0**	**597**	**0%**

Source: Vinehealth Australia



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

McLaren Vale Wine Region

Vinehealth AUSTRALIA

SA Winegrape Crush Survey

Regional Summary Report 2018

McLaren Vale Wine Region

Wine Australia August 2018

McLaren Vale

Vintage overview

VINTAGE REPORT

The 2018 vintage in McLaren Vale is being touted as producing wine of excellent quality. While total tonnages were down for the season, compared to a wet and fertile 2017, the wine quality was set up by the wet growing season in 2016/2017 which led to healthy lush vines through the early part of this season. For 2017/18 the conditions were much drier which prevented excessive vigour or disease problems as the vines switched from vegetative growth to ripening fruit.

Winter rainfall was average and soil moisture sensors recorded a wet soil profile at budburst. Budburst fell in the middle of September, in line with long term averages, although late compared with recent warm vintages.

Spring rainfall totals were 30-60% below average, ranging from 60-80 mm along the coast at Sellicks and Maslins Beach, to up to 200 mm at Clarendon on the escarpment of the Mt Lofty Ranges. Summer was unusually dry; there was as little as 10mm of rain from 1st of January to when picking began at the end of February. Rainfall totals around the region for summer 2017-18 were below average with weather stations reporting around 60% to 80% of their summer average.

Fortunately, McLaren Vale growers have access to multiple water sources, including recycled water, which allows for timely irrigation - and the naturally wet Blewitt Springs and Clarendon districts are considered to benefit from drier seasons.

January had 14 days consecutively above 30ºC, but fortunately only three days above 40ºC.

Favourable ripening during February, with daytime temperatures in the high 20s and cool nights, led to fruit in great condition at picking.

James Hook, McLaren Vale Grape, Wine and Tourism Association

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from McLaren Vale was 35,650 tonnes in 2018, compared with 44,153 tonnes in 2017 – a decline of 19%.

Over the past five years, the average crush has been 36,408 tonnes. This year's vintage was very similar to the average. The largest reported crush in the past five years was the 2017 crush while the smallest was 28,434 tonnes in 2015.

The total estimated value of the fruit was $60 million, down from $71 million in 2017, reflecting the decreased tonnage. Overall, average prices increased by 6% for red varieties and 5% for white varieties.

The average price of Shiraz increased by 7% to $1869 per tonne – the highest since 2008, while Cabernet Sauvignon also increased by 7%, reaching a record price of $1677 per tonne. The average price for Chardonnay increased by 10% to $781 per tonne.

The price dispersion data shows that this year 24% of red fruit was purchased at $2000 or above, compared with 22% in 2017. For the whites, the vast majority (91%) was purchased at between $600 and $1500.

There were 48 hectares of new plantings in McLaren Vale in spring 2017, compared with 67 hectares the previous spring. 98% were red varieties, with 58% being Shiraz. The total planted area as at 30 April 2018 is 7,324 hectares, 140 hectares less than in 2013.

NB It is estimated that the reported crush under-estimates the total crush in McLaren Vale by around 25% as a result of a low regional response rate. However, the reported trends, prices and varietal composition of the crush are likely to be representative of the full production.

McLaren Vale

Winegrape intake summary table - red

	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													
Barbera										10	100%	10	$10,024
Cabernet Franc	38			20	3	15	$73,030	$1,930	18%	0	1%	38	$73,782
Cabernet Sauvignon	3,517			1,094	1,885	538	$5,898,824	$1,677	7%	3,124	47%	6,641	$11,138,531
Durif	13			5		8				19	60%	32	$71,898
Grenache	1,349		5	408	637	299	$2,263,976	$1,678	5%	1,006	43%	2,355	$3,952,327
Malbec	12					12				8	39%	20	$40,910
Mataro/Mourvedre	380			112	214	54	$590,518	$1,553	4%	152	29%	532	$826,217
Merlot	940	110	16	724	69	21	$916,474	$975	17%	410	30%	1,350	$1,316,593
Montepulciano	5				5					8	63%	13	$19,275
Nero d'Avola	17				6	11	$34,344	$2,060	9%	38	69%	55	$112,365
Petit Verdot	77			74		4	$69,304	$895	6%	121	61%	198	$177,355
Pinot Noir	312			312			$266,041	$852	4%		0%	312	$266,041
Sangiovese	136			56	80		$201,379	$1,478	-4%	100	42%	236	$348,466
Shiraz	13,230			2,096	7,294	3,839	$24,722,351	$1,869	7%	7,266	35%	20,496	$38,301,066
Tempranillo	130			10	80	40	$249,750	$1,915	7%	83	39%	214	$408,787
Other red	85			7	21	57	$159,778	$1,884	-3%	176	67%	261	$491,454
Red total	**20,241**	**110**	**21**	**4,919**	**10,294**	**4,897**	**$35,506,760**	**$1,754**	**6%**	**12,521**	**38%**	**32,762**	**$57,555,091**

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

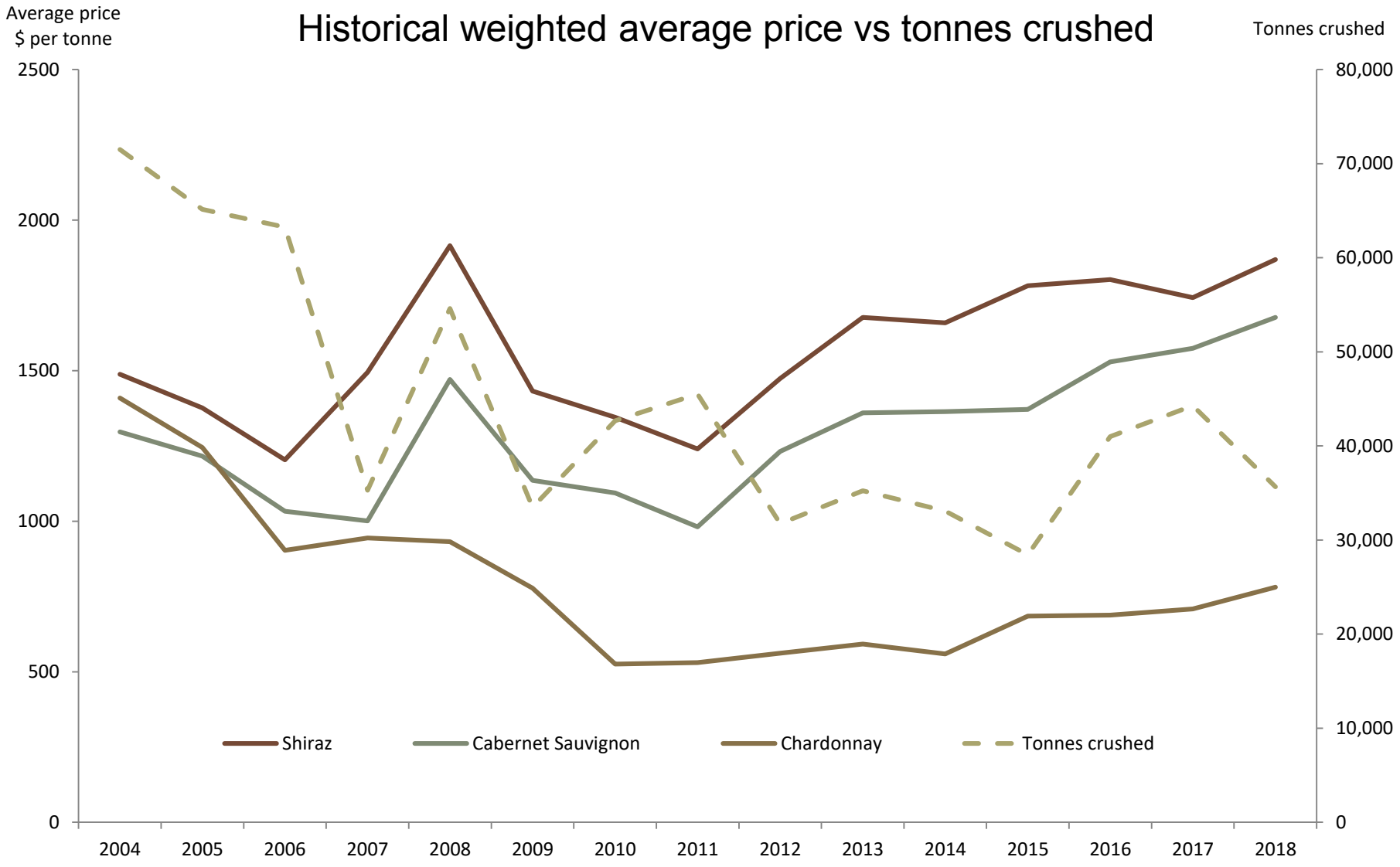
McLaren Vale

Winegrape intake summary table - white

	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	1,485			1,455	30		$1,160,078	$781	10%	158	10%	1,643	$1,283,330
Chenin blanc	6		4	1						20	78%	26	$12,435
Fiano	44				44		$75,262	$1,707	-4%		0%	44	$75,262
Marsanne	92			92						34	27%	126	$138,089
Muscat Blanc a Petits Grains	34				32					20	37%	54	$81,390
Pinot Gris/Grigio										198	100%	198	$243,930
Riesling	146			145	1					11	7%	157	$184,493
Roussanne	17					17				18	52%	35	$87,665
Sauvignon Blanc	82			82			$72,932	$888	13%	97	54%	180	$159,530
Semillon	11		11	1						32	74%	43	$22,918
Verdelho	88			75	13		$84,908	$966		14	14%	102	$98,429
Vermentino	37				37		$59,609	$1,608	0%		0%	37	$59,609
Viognier	137		3	131	0	2	$151,433	$1,102	0%	77	36%	214	$235,742
Other white	13			10		3				17	57%	29	$43,338
White total	**2,193**		**19**	**1,992**	**157**	**23**	**$1,996,662**	**$911**	**5%**	**695**	**24%**	**2,888**	**$2,726,158**
Grand total	**22,434**	**110**	**39**	**6,911**	**10,452**	**4,920**	**$37,504,990**	**$1,672**	**5%**	**13,216**	**37%**	**35,650**	**$60,281,249**

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

McLaren Vale

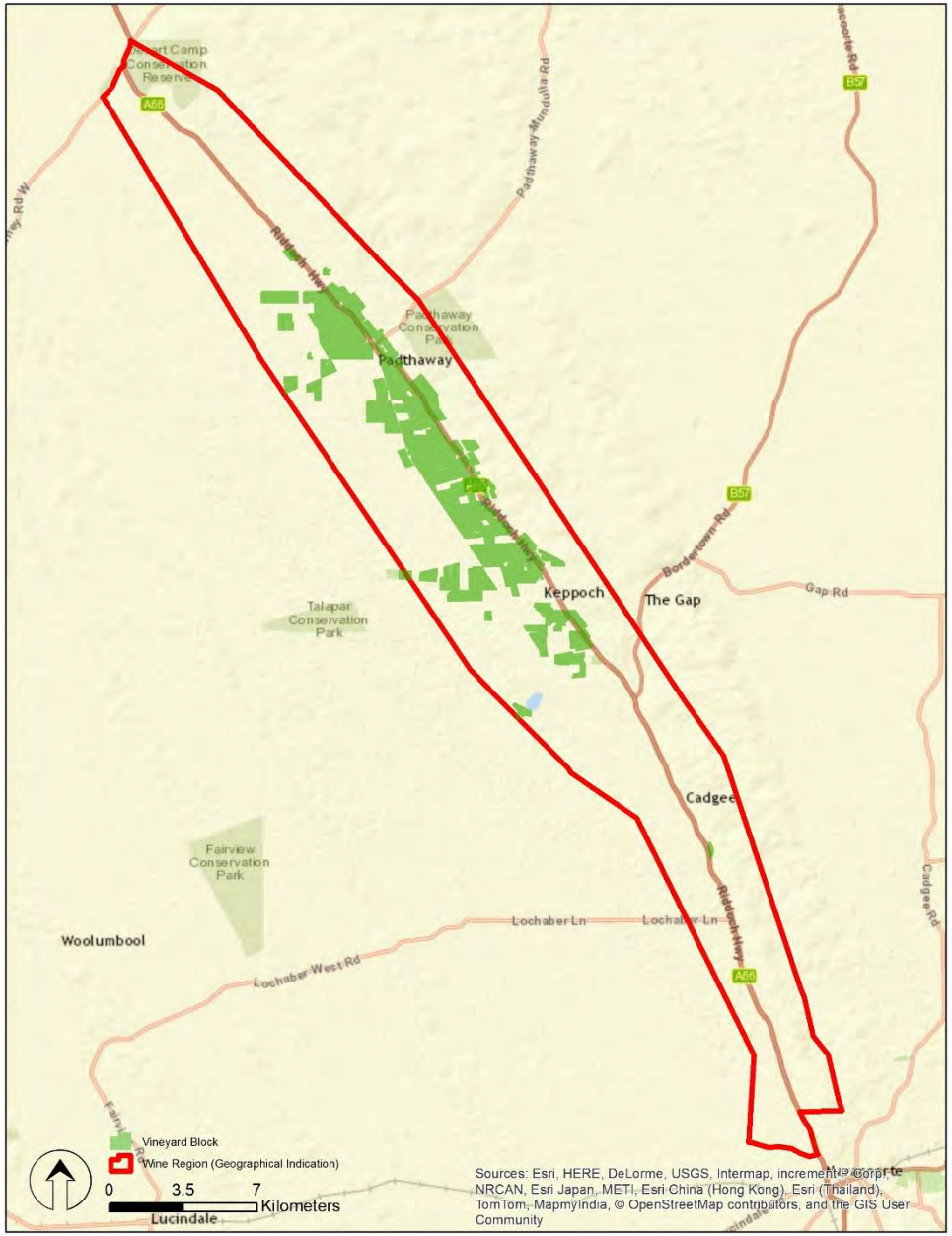


McLaren Vale

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Barbera	11	0	0	0	11	0%
Cabernet Franc	26	1	0	0	27	0%
Cabernet Sauvignon	1,285	15	4	5	1,309	0%
Grenache	445	4	1	3	454	1%
Mataro (Mourvedre)	83	1	4	2	90	2%
Merlot	213	0	0	0	213	0%
Petit Verdot	48	0	0	0	48	0%
Pinot Noir	51	0	0	0	51	0%
Sangiovese	44	0	0	0	44	0%
Shiraz	3,942	37	24	28	4,031	1%
Tempranillo	56	1	3	3	63	5%
Other red	97	8	9	6	120	5%
Total red varieties	**6,301**	**67**	**45**	**47**	**6,461**	**1%**
White winegrapes						
Chardonnay	350	0	2	0	352	0%
Chenin Blanc	17	0	0	0	17	0%
Marsanne	11	0	0	0	11	0%
Muscat A Petit Grains Blanc (White Frontignac)	12	0	0	0	12	0%
Pinot Gris	20	0	0	0	20	0%
Riesling	32	0	0	0	32	0%
Sauvignon Blanc	62	0	0	0	62	0%
Semillon	33	0	0	0	33	0%
Verdelho	15	0	0	0	15	0%
Vermentino	8	0	0	0	8	0%
Viognier	53	0	0	0	53	0%
Other white	35	0	6	1	43	2%
Total white varieties	**648**	**0**	**8**	**1**	**657**	**0%**
Rootstock Block	4	0	0	0	4	0%
Multi-purpose white	3	0	0	0	3	0%
Unknown variety	199	0	0	0	199	0%
Total all varieties	**7,155**	**67**	**53**	**48**	**7,324**	**1%**

Source: Vinehealth Australia



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

Vinehealth AUSTRALIA

SA Winegrape Crush Survey

Regional Summary Report 2018

Padthaway Wine Region

Wine Australia August 2018

Padthaway

Vintage overview

VINTAGE REPORT

The 2018 harvest progressed under ideal cool and dry conditions. Quality appears to be generally very good even though harvest yields are down on the above average yields of the last two years.

As early as last October 2017, initial bunch counts indicated that yields would be down by 10-15% on the 2017 harvest. When the November 4 frost hit the entire Limestone Coast region, the yields were impacted to varying degrees depending on location and what preventative measures were in place to mitigate the frost's effect. Some yields have been reduced by as little as 10% by the frost whilst some are more significantly affected.

Rainfall through the 2017-18 growing season has been normal, with a dry summer spanning from mid-November to Anzac Day. Disease pressure has been minimal.

The heat wave at the end of January 2018 had little impact in Padthaway because of readily abundant good water supply to maintain proper hydration, and the area's near proximity to the coast about 55 km away "as the crow flies". This ensures generally cool evening temperatures even when daytime temperatures soar.

Many compare Padthaway's climate to Langhorne Creek in the southern area of the Adelaide Hills as well as Heathcote in Victoria. The terroir is ideally suited to Chardonnay and Shiraz varieties that thrive in the region. Many other varieties are grown with many vineyards redeveloping to include increased areas of Cabernet Sauvignon in the well-drained terra-rossa soils over limestone.

John Summers, President, Padthaway Grape Growers' Association

OVERVIEW OF VINTAGE STATISTICS

The harvest from Padthaway in 2018 was 21,277 tonnes, down 48% from the above-average crop of 41,142 tonnes in 2017, and the lowest since 2002.

The five-year average crush for Padthaway from 2013 to 2017 was 33,868 tonnes, making the 2018 harvest 37% below the average. The maximum crush in the past five years was 44,922 tonnes in 2016 and the smallest was 25,351 tonnes in 2015.

The total estimated value of grapes was down from $36 million in 2017 to $20 million, with the lower crush partially offset by an overall increase in the average purchase value. All major varieties increased in average purchase value; Chardonnay was up 6% to $641 per tonne, Shiraz was up 17% to $1219 per tonne, and Cabernet Sauvignon was up 16% to $1197 per tonne.

The price dispersion data shows an upward shift in the prices for red varieties, with 5% purchased at $1500 per tonne or above, compared with just 2% in 2017.

There were 36 hectares of new plantings in Padthaway in spring 2017, with 23 hectares being Shiraz. The total area planted in the region as at 30 April 2018 was 3,896 hectares, a slight increase compared with last year but 170 hectares less than it was in 2013.

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	18			18						34	65%	53	$39,465
Cabernet Sauvignon	2,561			2,541		21	$3,065,706	$1,197	16%	1,172	31%	3,733	$4,467,999
Malbec	113			113						125	52%	238	$231,967
Merlot	279			279			$208,702	$748	10%	475	63%	754	$564,004
Pinot Noir	546			546						132	19%	678	$546,299
Shiraz	3,237		31	2,940	164	102	$3,946,002	$1,219	17%	2,055	39%	5,292	$6,451,393
Tempranillo	18					18					0%	18	$46,050
Other red										14	100%	14	$20,629
Red total	**6,773**		**31**	**6,438**	**164**	**141**	**$7,830,630**	**$1,156**	**16%**	**4,006**	**37%**	**10,780**	**$12,367,807**
White													
Chardonnay	4,560		1,107	3,453			$2,921,053	$641	6%	1,947	30%	6,507	$4,168,443
Gewurztraminer	156			156						171	52%	327	$225,347
Pinot Gris/Grigio	1,464			1,464						312	18%	1,775	$1,765,358
Riesling	391		52	339						551	58%	942	$878,716
Sauvignon Blanc	615			615			$507,834	$825	10%	81	12%	696	$574,399
Verdelho										116	100%	116	$115,246
Vermentino										6	100%	6	$7,350
Viognier	80			80						38	32%	118	$118,100
Other white										11	100%	11	$16,632
White total	**7,265**		**1,159**	**6,106**			**$5,436,703**	**$748**	**9%**	**3,232**	**31%**	**10,497**	**$7,869,592**
Grand total	**14,038**		**1,190**	**12,544**	**164**	**141**	**$13,267,332**	**$945**	**10%**	**7,239**	**34%**	**21,277**	**$20,237,399**

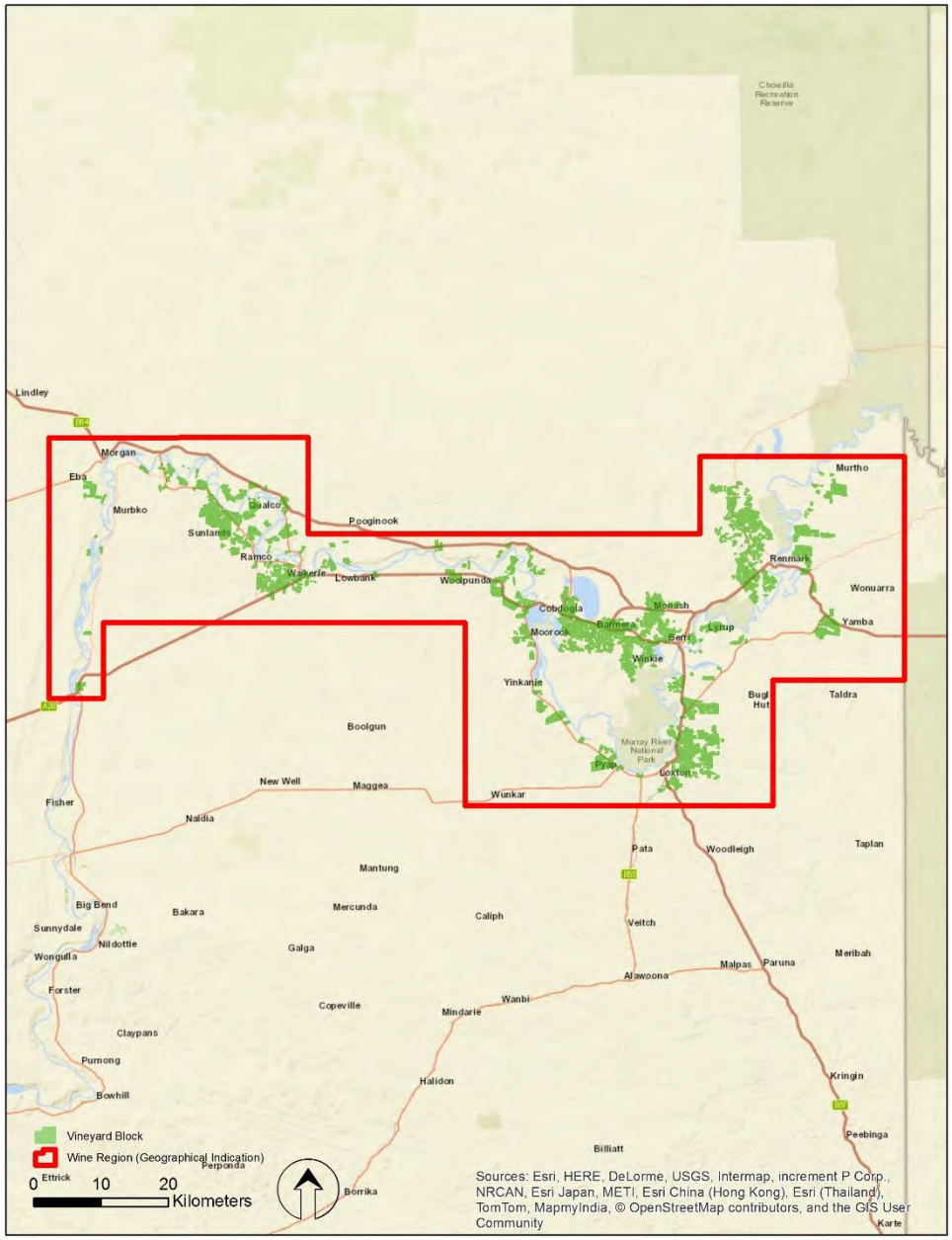
Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Padthaway

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Franc	12	0	0	0	12	0%
Cabernet Sauvignon	926	4	6	13	948	1%
Malbec	78	0	0	0	78	0%
Merlot	179	0	0	0	179	0%
Pinot Noir	110	0	0	0	110	0%
Shiraz	1,179	12	8	23	1,223	2%
Other red	8	0	2	0	10	0%
Total red varieties	**2,491**	**15**	**16**	**36**	**2,558**	**1%**
White winegrapes						
Chardonnay	844	0	4	0	847	0%
Pinot Gris	151	0	0	0	151	0%
Riesling	148	0	0	0	148	0%
Sauvignon Blanc	80	0	3	0	83	0%
Verdelho	19	0	0	0	19	0%
Viognier	19	0	0	0	19	0%
Other white	32	0	0	0	32	0%
Total white varieties	**1,292**	**0**	**6**	**0**	**1,298**	**0%**
Unknown variety	40	0	0	0	40	0%
Total all varieties	**3,823**	**15**	**22**	**36**	**3,896**	**1%**

Source: Vinehealth Australia



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

Regional Summary Report 2018

Riverland Wine Region

Wine Australia August 2018

Riverland

Vintage overview

VINTAGE REPORT

The 2018 vintage highlight was the demand for fruit and lack of rain during vintage which was a pleasant change for growers. The winemakers were actively competing for the major reds and whites, culminating in higher prices for most varieties.

Despite a relatively dry winter, even for the Riverland, budburst was even and the timing was about on par with previous years; however, the dry soil caused many growers to irrigate a bit earlier than normal. From October to December we had one good rain each month which did not cause any disease problems, allowing growers to minimise downy mildew sprays.

From early December onwards there was very little rain, with above average temperatures and a four day stretch in mid-January of above 40 degrees. Apart from a little leaf scorch this did not appear to do any damage to the fruit unlike other years.

Harvest of the whites started in late January which is about normal. They came in quite quickly and due to the lack of rain it was good clean fruit which resulted in good quality wine. Reports indicate that the yields for all the white varieties except Chardonnay will be below the 3-year average.

Unlike the last few years where we had the reds ripening at the same time as the whites, the wineries were able to process most of the whites before the reds really started. The reds' ripening also slowed from about the middle of February until early March; however they increased after that creating a frenzy to get them crushed within the preferred parameters.

The crop levels for all the reds, while being below last year's exceptionally high levels, were close to the three year average. Vintage was all over by early April, about three weeks earlier than the extended 2017 vintage.

Jim Caddy, CCW

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from the Riverland in 2018 was 447,410 tonnes, 5% below the near-record 2017 crush of 470,123 tonnes, but just above the five-year (2013-2017) average crush for the Riverland of 442,774 tonnes.

Despite the reduced tonnage, the total estimated value of all grapes increased by 9%, from $162 million to $176 million, as a result of a 14% increase in the overall average price paid.

The average prices for all major red varieties increased. Shiraz was up by 23% to $487 per tonne, and Cabernet Sauvignon by 19% to $466 per tonne. For whites, Chardonnay increased by 5% to $327 per tonne, despite having an increased tonnage against the general trend. Sauvignon Blanc increased by 8% to $411 per tonne. These increases follow similar increases in 2017, and the average prices for all the top three varieties are now the highest since 2008.

The price dispersion data shows an upward shift in dispersion, with purchases of more red varieties shifting into the $600 per tonne or above bracket than last year, and very few red grapes purchased at below $300 per tonne. For the whites, 28% were purchased at below $300 per tonne, compared with 35% in 2017.

There were 56 hectares of new plantings in the 2017 planting season, compared with 202 hectares the previous year. Cabernet Sauvignon (19 hectares) and Pinot Gris/Grigio (14 hectares) were the main contributors to the new plantings. The non-bearing area of Pinot Gris is currently over one-third of its total area.

There was a net increase in total vineyard area in the Riverland of around 35 hectares after a decline of 300 hectares last year. The total planted area is 20,339 hectares, 400 hectares less than it was in 2013.

Riverland

Winegrape intake summary table - red

	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													
Barbera	6		6							23	80%	29	$10,911
Cabernet Franc	4		4								0%	4	$1,517
Cabernet Sauvignon	49,489		49,266	222			$23,062,955	$466	19%	13,968	22%	63,457	$29,572,576
Dolcetto	3		3								0%	3	$1,228
Durif	563		192	371	1		$329,254	$585	18%	271	32%	834	$487,585
Grenache	3,329		3,308	21			$1,322,198	$397	19%	362	10%	3,691	$1,465,902
Lagrein	22		6	13	3		$20,786	$926	2%		0%	22	$20,786
Malbec	194		194							92	32%	286	$105,813
Mataro/Mourvedre	2,641		2,597	45			$1,173,026	$444	26%	168	6%	2,809	$1,247,517
Merlot	17,001		16,958	43			$7,609,007	$448	15%	7,316	30%	24,317	$10,883,243
Montepulciano	109		49	56	5		$73,885	$676	8%	48	31%	157	$106,317
Muscat Rouge a Petits Grains	185		185								0%	185	$81,063
Petit Verdot	5,734		5,709	25			$2,399,952	$419	18%	5,946	51%	11,681	$4,888,664
Pinot Noir	7,734		7,734				$3,355,645	$434	13%	1,043	12%	8,777	$3,808,125
Ruby Cabernet	903		890	12			$380,278	$421	20%	974	52%	1,876	$790,423
Sangiovese	73		71	2			$33,382	$458		317	81%	390	$178,763
Shiraz	86,072		85,264	808			$41,883,819	$487	23%	24,213	22%	110,286	$53,666,304
Tarrango	210	210									0%	210	$49,672
Tempranillo	663		663				$303,070	$457	7%	222	25%	886	$404,696
Other red	1,125		1,079	41	4		$533,935	$475	2%	605	35%	1,729	$821,020
Red total	**176,062**	**210**	**174,180**	**1,659**	**13**		**$82,688,619**	**$470**	**20%**	**55,569**	**24%**	**231,631**	**$108,592,124**

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

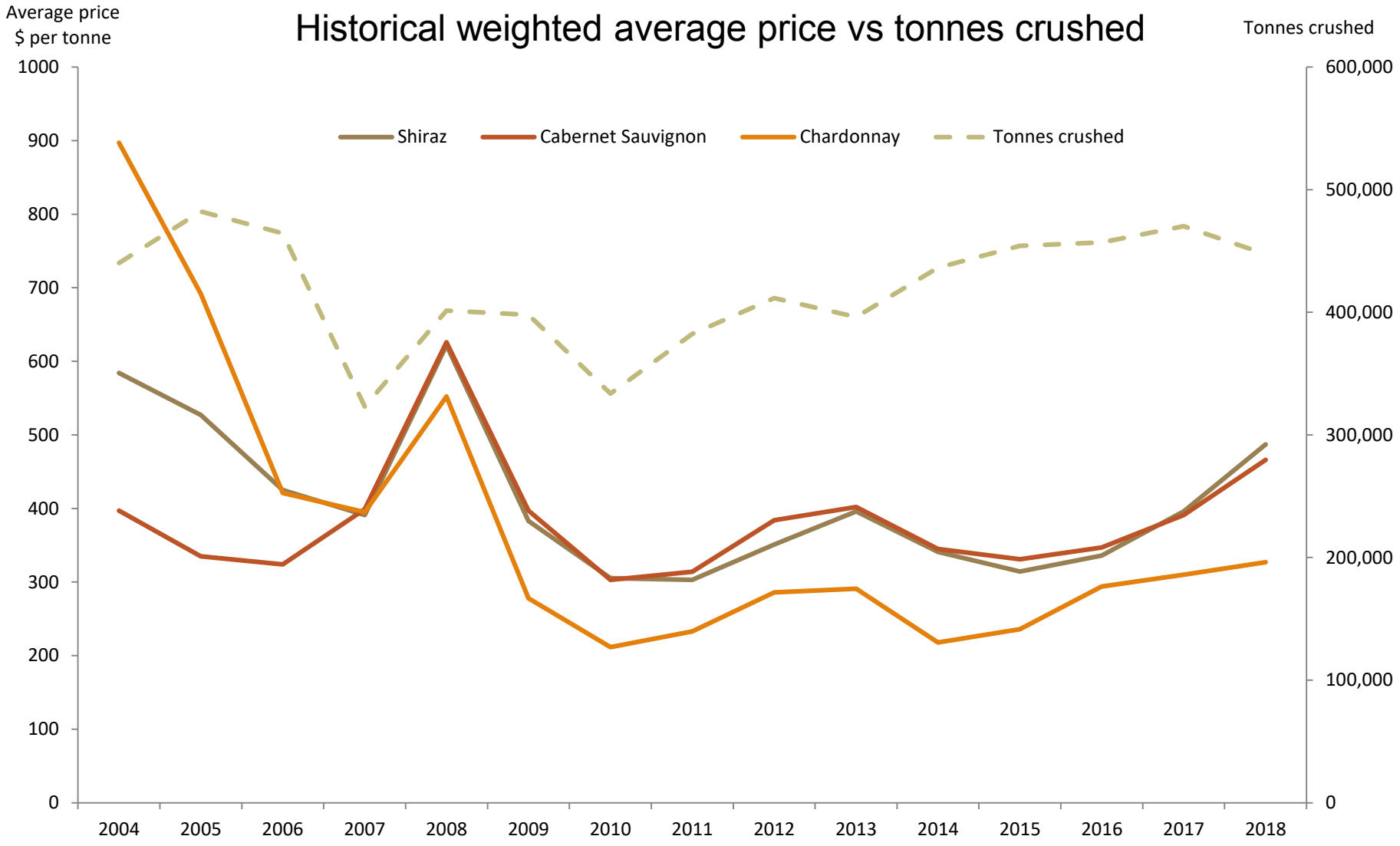
Riverland

Winegrape intake summary table - white

	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													
Canada Muscat	33		33							98	75%	131	$65,450
Chardonnay	101,989		101,629	359			$33,346,022	$327	5%	19,929	16%	121,918	$39,861,919
Chenin blanc	1,559	1,550	10				$387,444	$248	10%	11		1,570	$390,181
Colombard	23,087	23,080	7				$5,541,579	$240	8%	3,477	13%	26,563	$6,376,073
Doradillo	42	42								7	14%	49	$10,976
Fiano	148		145	4						3	2%	152	$69,900
Gewurztraminer	1,350	7	1,343				$464,969	$344	-9%	1,411	51%	2,761	$951,067
Moscato Giallo	66		66								0%	66	$19,812
Muscadelle (Tokay)	32	32								37	54%	70	$20,605
Muscat Blanc a Petits Grains	3,619	57	3,562				$1,181,559	$326	6%	447	11%	4,066	$1,327,393
Muscat Gordo Blanco	21,927	21,581	346				$5,211,809	$238	3%	2,204	9%	24,131	$5,735,781
Pinot Gris/Grigio	2,225		2,225				$1,134,167	$510	1%	556	20%	2,781	$1,417,376
Riesling	2,249	65	2,184				$763,157	$339	6%	597	21%	2,847	$965,900
Roussanne	7	7									0%	7	$1,890
Sauvignon Blanc	12,523		12,523				$5,144,411	$411	8%	3,344	21%	15,867	$6,517,891
Semillon	4,014	2,739	1,275				$1,153,063	$287	7%	3,658	48%	7,672	$2,203,994
Sultana	486	466	20				$116,819	$240	12%		0%	486	$116,819
Verdelho	1,901	747	1,154				$721,591	$380	11%	72	4%	1,973	$748,857
Vermentino	338	35	208	95			$157,743	$467	13%	234	41%	572	$267,015
Viognier	1,007	79	737	191			$435,326	$432	18%	504	33%	1,511	$653,134
Other white	413	400	4	9			$99,777	$242	0%	175	30%	588	$142,107
White total	**179,016**	**50,888**	**127,470**	**658**			**$55,985,057**	**$313**	**6%**	**36,764**	**17%**	**215,779**	**$67,864,140**
Grand total	**355,078**	**51,098**	**301,650**	**2,317**	**13**		**$138,673,676**	**$391**	**14%**	**92,332**	**21%**	**447,410**	**$176,456,265**

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
Average price
$ per tonne
Tonnes crushed
Shiraz
Cabernet Sauvignon
Chardonnay
Tonnes crushed
1000
900
800
700
600
500
400
300
200
100
0
600,000
500,000
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0
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018

Riverland

Current plantings by variety and year planted – white winegrapes

	Year planted					
Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
White winegrapes						
Chardonnay	4,445	0	2	0	4,447	0%
Chenin Blanc	84	0	0	0	84	0%
Colombard	783	1	0	0	784	0%
Doradillo	36	0	0	0	36	0%
Muscadelle (Tokay)	11	0	0	0	11	0%
Muscat A Petit Grains Blanc (White Frontignac)	127	0	0	0	127	0%
Muscat Gordo Blanco	962	6	0	1	968	0%
Palomino	8	0	0	0	8	0%
Pinot Gris	94	7	33	14	148	10%
Riesling	167	0	0	0	167	0%
Sauvignon Blanc	519	0	16	6	541	1%
Semillon	335	0	0	0	335	0%
Sultana	146	0	0	0	146	0%
Traminer (Gewurztraminer)	115	0	0	0	115	0%
Trebbiano	15	0	0	0	15	0%
Verdelho	93	0	0	0	93	0%
Vermentino	17	0	0	0	17	0%
Viognier	120	0	0	0	120	0%
Other white	57	4	1	0	62	0%
Total white varieties	**8,134**	**18**	**52**	**21**	**8,225**	**0%**

Source: Vinehealth Australia

Riverland

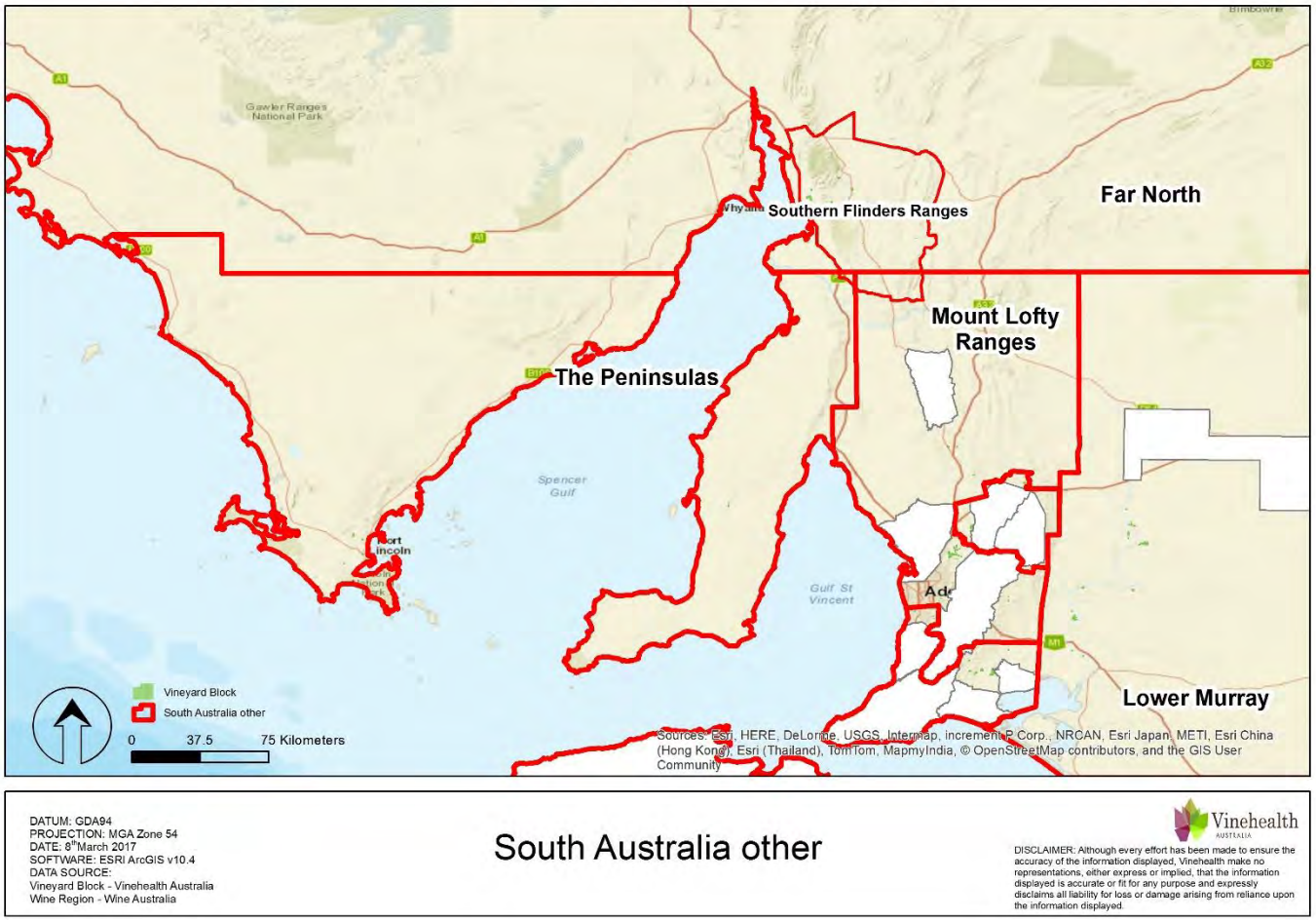
Current plantings by variety and year planted – white winegrapes

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Sauvignon	3,200	28	30	19	3,277	1%
Grenache	341	0	0	0	341	0%
Malbec	23	0	3	0	26	0%
Mataro (Mourvedre)	239	0	0	0	239	0%
Merlot	1,169	9	4	3	1,185	0%
Petit Verdot	496	0	0	0	496	0%
Pinot Noir	290	0	0	0	290	0%
Ruby Cabernet	120	0	0	0	120	0%
Sangiovese	14	0	0	4	18	20%
Shiraz	5,366	65	92	3	5,526	0%
Tempranillo	52	2	0	0	54	0%
Other red	125	9	21	6	161	4%
Total red varieties	**11,435**	**113**	**150**	**35**	**11,733**	**0%**
Unknown variety	246	0	0	0	246	0%
Rootstock Block	25	0	0	0	25	0%
Table grapes - red	28	1	0	0	29	0%
Table grapes - white	11	16	0	0	27	0%
Multi-purpose red	62	0	0	0	63	0%
Multi-purpose white	25	2	0	0	27	0%
Total all varieties	**19,966**	**150**	**202**	**56**	**20,375**	**0%**

Source: Vinehealth Australia

SA Winegrape Crush Survey Regional Summary Report 2018

South Australia - other



Wine Australia August 2018

SA - other

Vintage overview

South Australia (other) includes the GI region of Southern Flinders Ranges, the Peninsulas zone, and the vineyards in Mount Lofty Ranges (other) and Lower Murray zone (other) – see map on cover page. The total area of vines included in this definition is 1,010 hectares.

OVERVIEW OF VINTAGE STATISTICS

The harvest from South Australia (other) in 2018 was 7,668 tonnes, compared with 6,975 tonnes in 2017. Most of the increase came from Lower Murray zone – other, which was up by 45%.

The five-year average crush for this group of regions is 4,372 tonnes, implying that 2018 yields were significantly up on average. However, apparent changes in small and non-defined areas may be disproportionately affected by changes in the response group and/or adjustments to vineyard location classifications.

The total value of fruit from these vineyards in 2018 is estimated at $5 million – very similar to 2017. The increased tonnage was offset by an overall decrease of 10% in the average purchase value, mainly driven by Shiraz, which decreased by 8% to $921 per tonne. On the other hand, Chardonnay was up 5% to $322 per tonne and Cabernet Sauvignon was up 9% to $807 per tonne.

The price dispersion data shows that 56% of reds were purchased at $600 per tonne and above, while all white varieties were purchased at below $600 per tonne.

There were no new plantings in Mount Lofty Ranges – other, Lower Murray zone – other, Southern Flinders Ranges or the Peninsulas in spring 2017. All these areas are dominated by Shiraz, which makes up 45% of all plantings. The total area has declined from 1,100 hectares in 2013 to 1,010 hectares as at 30 April 2018.

SA - other

Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< $300	$300 to <$600	$600 to <$1500	$1500 to <$2000	$2000+							
Red													
Cabernet Sauvignon	1,090		598	425		67	$880,147	$807	9%	112	9%	1,202	$970,498
Grenache	22		18	4						5	17%	27	$14,655
Mataro/Mourvedre	35				35						0%	35	$52,290
Merlot	201		201				$87,497	$435	-6%	20	9%	221	$96,199
Montepulciano	5					5					0%	5	$9,280
Petit Verdot	42			27	15					3	7%	45	$47,254
Sangiovese	63			63						30	32%	93	$83,396
Shiraz	2,649		993	1,480	79	97	$2,438,903	$921	-8%	385	13%	3,033	$2,792,998
Tempranillo	4			4							0%	4	$3,195
Other red	18			18							0%	18	$13,200
Red total	**4,128**		**1,810**	**2,021**	**129**	**169**	**$3,597,335**	**$871**	**-1%**	**554**	**12%**	**4,682**	**$4,082,965**
White													
Chardonnay	1,450		1,450				$466,920	$322	5%	1	0%	1,451	$467,181
Chenin blanc	21	21									0%	21	$4,680
Colombard	243	174	69								0%	243	$59,891
Fiano	75		75								0%	75	$22,500
Muscat Gordo Blanco	46	46									0%	46	$11,600
Pinot Gris/Grigio	848		848				$423,941	$500			0%	848	$423,941
Riesling	37		37								0%	37	$11,172
Sauvignon Blanc	187		187								0%	187	$73,598
Semillon	69		69								0%	69	$27,464
Vermentino	8		8								0%	8	$2,720
Viognier										0	100%	0	$491
White total	**2,985**	**241**	**2,743**				**$1,104,486**	**$370**	**16%**	**1**	**0%**	**2,986**	**$1,105,238**
Grand total	**7,113**	**241**	**4,553**	**2,021**	**129**	**169**	**$4,701,821**	**$661**	**-10%**	**555**	**7%**	**7,668**	**$5,188,203**

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

SA - other

Current plantings by variety and year planted

Southern Flinders Ranges

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
	Year planted					
Red winegrapes						
Cabernet Sauvignon	18	0	0	0	18	0%
Merlot	6	0	0	0	6	0%
Shiraz	124	0	0	0	124	0%
Other red	0	0	0	0	0	0%
Total red varieties	**148**	**0**	**0**	**0**	**148**	**0%**
White winegrapes						
Total white varieties	**1**	**0**	**0**	**0**	**1**	**0%**
Unknown variety	45	0	0	0	45	0%
Total all varieties	**194**	**0**	**0**	**0**	**194**	**0%**

The Peninsulas

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
Cabernet Sauvignon	9	0	0	0	9	0%
Other red	3	0	0	0	3	0%
Shiraz	12	0	0	0	12	0%
Unknown	37	0	0	0	37	0%
Total all varieties	**71**	**0**	**0**	**0**	**71**	**0%**

Source: Vinehealth Australia

SA - other

Current plantings by variety and year planted

Lower Murray zone - other

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
	Year planted					
Red winegrapes						
Cabernet Sauvignon	72	0	0	0	72	0%
Merlot	18	0	0	0	18	0%
Petit Verdot	16	0	0	0	16	0%
Shiraz	130	3	0	0	133	0%
Other red	16	0	0	0	16	0%
Total red varieties	**251**	**3**	**0**	**0**	**255**	**0%**
White winegrapes						
Chardonnay	84	0	0	0	84	0%
Colombard	14	0	0	0	14	0%
Riesling	10	0	0	0	10	0%
Sauvignon Blanc	12	0	0	0	12	0%
Other white	13	0	0	0	13	0%
Total white varieties	**133**	**0**	**0**	**0**	**133**	**0%**
Unknown variety	29	0	0	0	29	0%
Total all varieties	**414**	**3**	**0**	**0**	**417**	**0%**

Source: Vinehealth Australia

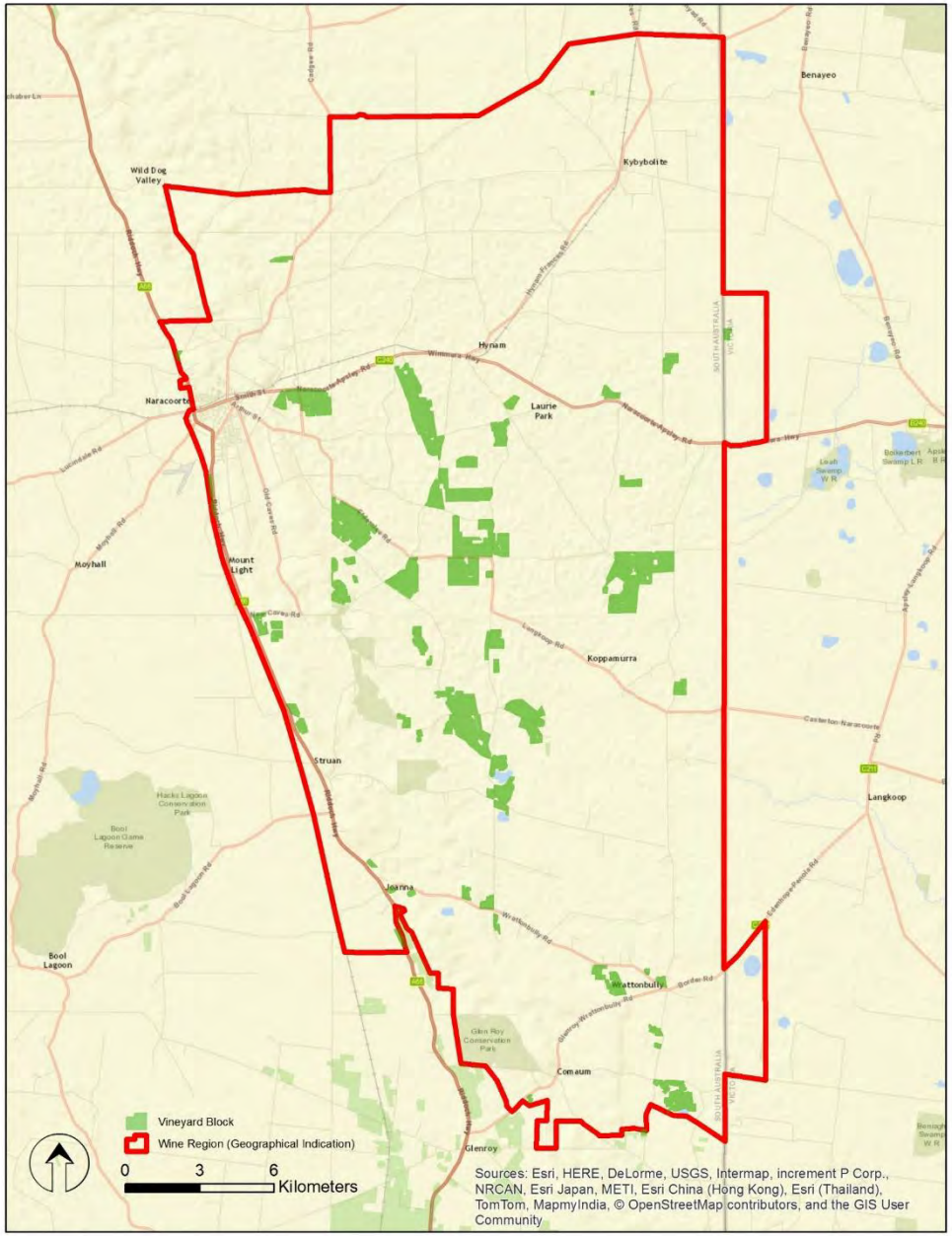
SA - other

Current plantings by variety and year planted

Mount Lofty Ranges zone - other

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
	Year planted					
Red winegrapes						
Cabernet Sauvignon	74	0	0	0	74	0%
Merlot	6	0	0	0	6	0%
Petit Verdot	6	0	0	0	6	0%
Sangiovese	12	0	0	0	12	0%
Shiraz	186	0	0	0	186	0%
Other red	22	0	0	0	22	0%
Total red varieties	**307**	**0**	**0**	**0**	**307**	**0%**
White winegrapes						
Chardonnay	4	0	0	0	4	0%
Riesling	5	0	0	0	5	0%
Semillon	1	0	0	0	1	0%
Other white	8	0	0	0	8	0%
Total white varieties	**19**	**0**	**0**	**0**	**19**	**0%**
Unknown variety	4	0	0	0	4	0%
Total all varieties	**329**	**0**	**0**	**0**	**329**	**0%**

Source: Vinehealth Australia



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

Wrattonbully Wine Region

Vinehealth AUSTRALIA

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SA Winegrape Crush Survey

Regional Summary Report 2018

Wrattonbully Wine Region

Wine Australia August 2018

Wrattonbully

Vintage overview

VINTAGE REPORT

2018 got off to a great start with ample winter rainfall leading to full soil moisture profiles and leaching of the soil, creeks running, and plenty of aquifer recharge. Budburst occurred on par with long term averages, and ample soil moisture aided very good early shoot growth. Slightly below average temps during August and September were driven by lower maximum temperatures (minimum temp's slightly above average). October temperatures were in general above average due to higher minimum and maximum temperatures.

A late frost event (4th November -1.5°C) caused considerable damage throughout the region.

Average temperatures were near or slightly above long-term averages from November-March. The combination of early soil moisture and slightly warmer condition led to strong and balanced canopy growth and very good fruit set.

A combination of the warmer, dry conditions in January and February along with strong canopies raced the fruit along looking like it may be an early vintage. This was the case with the white varieties as the majority of them were harvested by early March. As cooler conditions returned in March, the ripening of the red varieties slowed and stalled which led to a 3 to 4 week gap in harvesting between the whites and reds. This was very beneficial to the reds as this allowed for them to experience a long slow ripening which then assisted the development of flavours and tannins and allowed them to ripen without the Baumés racing away. Shiraz benefited from the extra week or two of hang time, to allow the flavours to catch up with the early high Baumés. Cabernet Sauvignon again was the stand out with the wines showing very strong varietal characters, colour and balanced tannins.

Tim Fletcher, President, Wrattonbully Wine Region

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Wrattonbully in 2018 was 13,160 tonnes, 52% down on the 2017 harvest of 27,374 tonnes and the lowest since 2007.

The five-year average crush for Wrattonbully from 2013-2017 was 20,918 tonnes. The 2017 crush was the highest in the five year period while the smallest was 16,557 tonnes in 2015. The 2018 crush was 37% below the five-year average.

The total value of grapes decreased from $28.5 million in 2017 to $15.6 million in 2018, with the lower tonnages partially offset by significant increases in the average purchase value of all major varieties. Cabernet Sauvignon increased by 12% to $1379 per tonne, Shiraz increased by 17% to $1275 per tonne and Merlot increased by 26% to $1169 per tonne. Chardonnay also increased – up 9% to $722 per tonne, and Pinot Gris/Grigio increased by 12% to $1010 per tonne.

The price dispersion data shows that 85% of red tonnages were purchased at between $600 and $1500 per tonne and 14% at $1500 per tonne or higher, which was similar to 2017. For the whites, there was an upward shift, with 91% purchased between $600 and $1500 per tonne compared with 77% in 2017, and 9% below $600 per tonne compared with 23% in 2017.

There were 10 hectares of new plantings in Wrattonbully in the 2017 planting season, similar to the two previous years. All were red varieties.

The total planted area in Wrattonbully as at 30 April 2018 was 2,680 hectares, almost identical to 2017 and only 7 hectares less than in 2013.

Wrattonbully

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										3	100%	3	$3,802
Cabernet Sauvignon	2,315			1,964	230	120	$3,191,591	$1,379	12%	2,441	51%	4,756	$6,557,922
Malbec	11			11							0%	11	$11,360
Merlot	447			329	118		$522,872	$1,169	26%	963	68%	1,410	$1,648,906
Petit Verdot	4			4						7	61%	11	$13,548
Pinot Noir	390			390						71	15%	461	$412,305
Sangiovese										25	100%	25	$29,386
Shiraz	1,879		42	1,577	221	39	$2,395,194	$1,275	17%	1,524	45%	3,403	$4,336,926
Tempranillo	50			50							0%	50	$69,356
Red total	**5,096**		**42**	**4,326**	**569**	**160**	**$6,544,613**	**$1,284**	**13%**	**5,033**	**50%**	**10,129**	**$13,083,512**
White													
Chardonnay	863		113	750			$622,972	$722	9%	441	34%	1,304	$941,616
Gewurztraminer	6			6							0%	6	$4,620
Pinot Gris/Grigio	191			191			$192,470	$1,010	12%	920	83%	1,111	$1,121,848
Riesling										91	100%	91	$106,830
Sauvignon Blanc	146			146						277	66%	422	$278,810
Semillon										25	100%	25	$22,767
Viognier										71	100%	71	$89,612
White total	**1,205**		**113**	**1,092**			**$916,118**	**$760**	**10%**	**1,826**	**60%**	**3,030**	**$2,566,103**
Grand total	**6,301**		**155**	**5,418**	**569**	**160**	**$7,460,732**	**$1,184**	**14%**	**6,859**	**52%**	**13,160**	**$15,649,615**

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

Wrattonbully

Current plantings by variety and year planted

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red winegrapes						
Cabernet Sauvignon	1,206	11	0	2	1,220	0%
Malbec	7	0	2	0	8	0%
Merlot	278	0	2	0	280	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	695	0	4	8	707	1%
Tempranillo	9	0	0	0	9	0%
Other red	13	0	0	0	13	0%
Total red varieties	**2,271**	**11**	**7**	**10**	**2,300**	**0%**
White winegrapes						
Chardonnay	190	0	0	0	190	0%
Pinot Gris	98	0	2	0	99	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	61	0	0	0	61	0%
Semillon	5	0	0	0	5	0%
Other white	11	0	0	0	11	0%
Total white varieties	**372**	**0**	**2**	**0**	**373**	**0%**
Unknown variety	6	0	0	0	6	0%
Total all varieties	**2,649**	**11**	**9**	**10**	**2,680**	**0%**

Source: Vinehealth Australia

Explanations and definitions

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.

Maps and planting data tables are provided by Vinehealth Australia (see notes on planting data tables pg 20).

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 winesa.com.au

Photo credits

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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:

Wine Australia Market Insights
+618 8228 2000
market/insights@wineaustralia.com

Explanations and definitions - continued

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 85 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 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 2018).

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.

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 2018 Australian Wine Sector 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.

Explanatory notes for planting data tables

Regions are defined according to the Register of Australian Geographical Indications.

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 six, 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 2018 and include all plantings from the 2017 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 2018 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.

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.

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