

Prepared by:

# Wine Australia

On behalf of:



# SA Winegrape Crush Survey 2019

*July 2019*

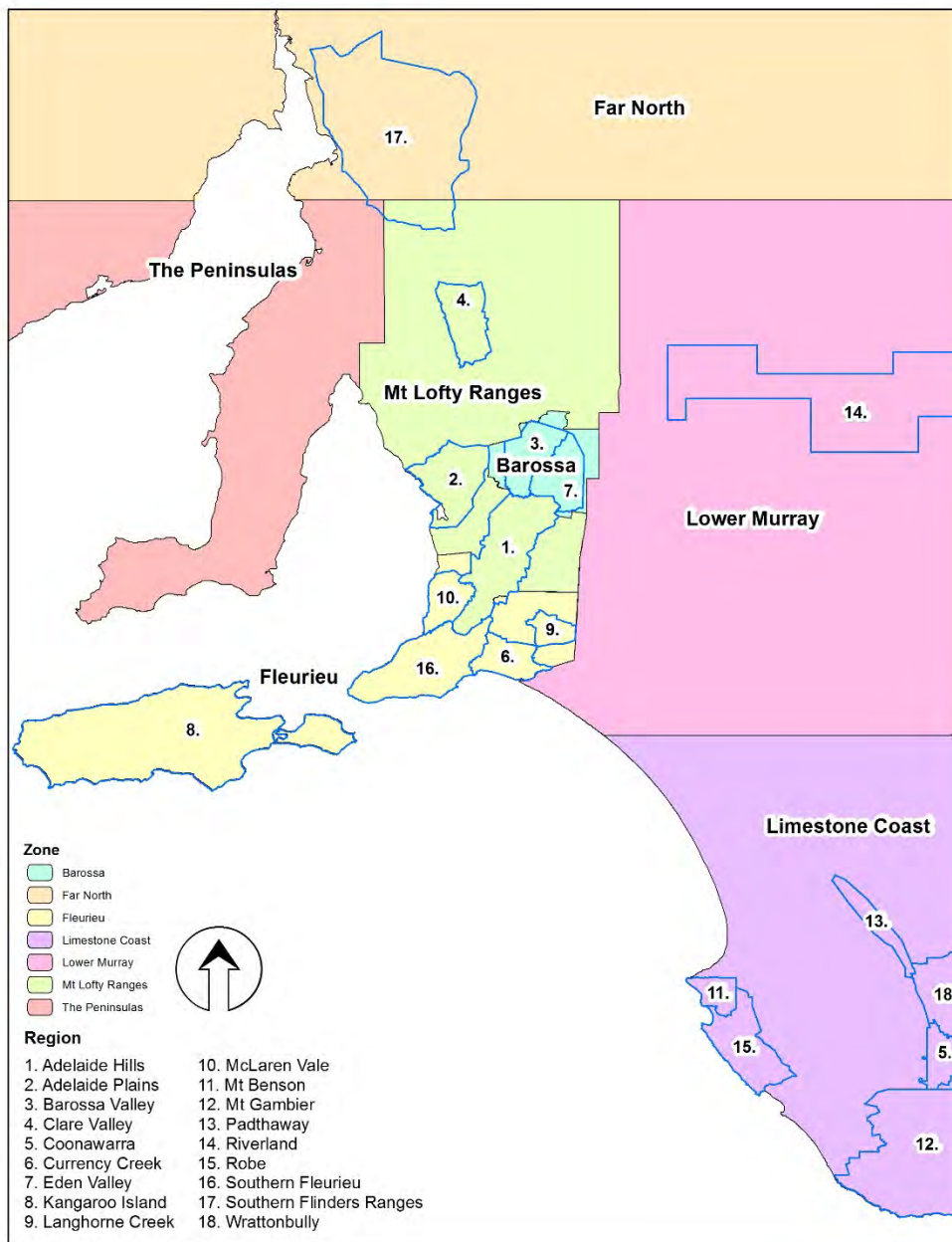
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# SA Winegrape Crush Survey 2019

## State Summary Report

*Wine Australia July 2019*



### Geographical Indication Zones and Regions in South Australia



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



# State summary 2019

## Overview of vintage statistics

### *State and regional overview*

The total reported crush of South Australian winegrapes in 2019 was 768,863 tonnes. This was an increase of 3 per cent compared with the 2018 reported crush of 748,484 tonnes; it was almost identical to the five-year average (2014-2018) of 770,573 tonnes and 5 per cent above the 10-year average (2009-2018) of 732,734 tonnes<sup>1</sup>.

The top three regions by volume in 2019 were the Riverland with 474,090 tonnes, Langhorne Creek with 43,137 tonnes and the Barossa Valley (including Barossa zone – other) with 40,986 tonnes.

Regions in the Limestone Coast showed large increases, countering the substantial decreases that occurred in 2018, while most other cool climate regions decreased, particularly the Barossa, Clare Valley and the Adelaide Hills, which had decreases of between 28 per cent and 41 per cent. The Riverland increased by 6 per cent to 474,090 tonnes – the largest crush for the region since 2005 – and increased its share of the state's production to 62 per cent by volume.

The total estimated value of the crush increased by 7 per cent to just over \$630 million in 2019 compared with \$590 million in 2018, reflecting both the larger crush and an increase in the average purchase value per tonne, which was up on average across the state by 5 per cent to \$746 per tonne in 2019.

Weighted average prices increased for the top variety in most of the major regions except Coonawarra, reflecting continued strong demand and supply pressures.

<sup>1</sup> Nationally, there was an estimated non-response rate of 12 per cent compared with 17 per cent in 2018. A specific non-response rate for South Australia is not known; however, there were 238 respondents who reported crushing grapes from South Australia in 2019, compared with 212 in 2018. The increased response rate may partly account for changes to the crush.

### *Varietal overview*

The red crush was 475,718 tonnes, which was 5 per cent higher than the 2018 crush. White varieties decreased by 1 per cent to 293,145 tonnes. Red varieties increased their share of the crush from 61 per cent to 62 per cent.

Most of the major red varieties increased, with Shiraz up by 2 per cent to 225,484 tonnes, Cabernet Sauvignon up by 7 per cent to 140,248 tonnes and Merlot up by 22 per cent to 49,404 tonnes – reversing a decrease of 18 per cent in 2018.

Chardonnay decreased by 3 per cent to 150,350 tonnes, Sauvignon Blanc increased by 1 per cent to 31,358 tonnes and Muscat Gordo Blanco increased by 14 per cent to 27,643 tonnes, overtaking Colombard as the third largest white variety.

### *Vineyard plantings*

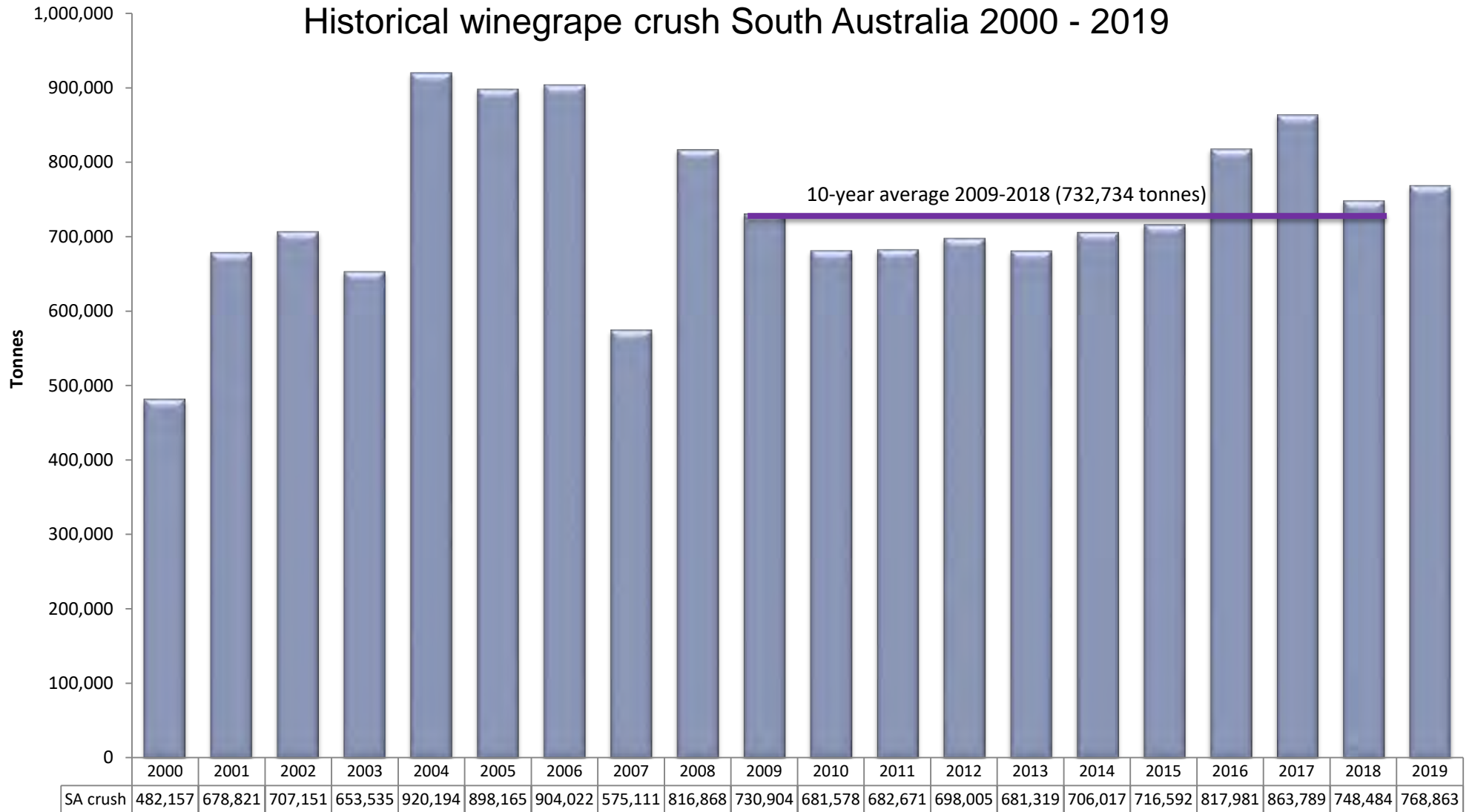
Planting data derived from the Vinehealth Australia vineyard register shows that there were 75,488 hectares planted to vines in South Australia as at 30 April 2019. This represents a net decrease of 68 hectares in the last 12 months. Although there have been net decreases in each of the past five years, the current area planted is 6,000 hectares higher than it was in 2004.

There are indications of an increase in new plantings, with a total of 692 hectares planted in spring 2018 (including top-working and replacements) compared with 410 hectares in spring 2017. Over 80 per cent of new plantings were red varieties and nearly half were Shiraz.

There were 3,296 vineyard owners registered with Vinehealth Australia as at 30 April 2019. This was 30 fewer than at the same time last year.

# State summary 2019

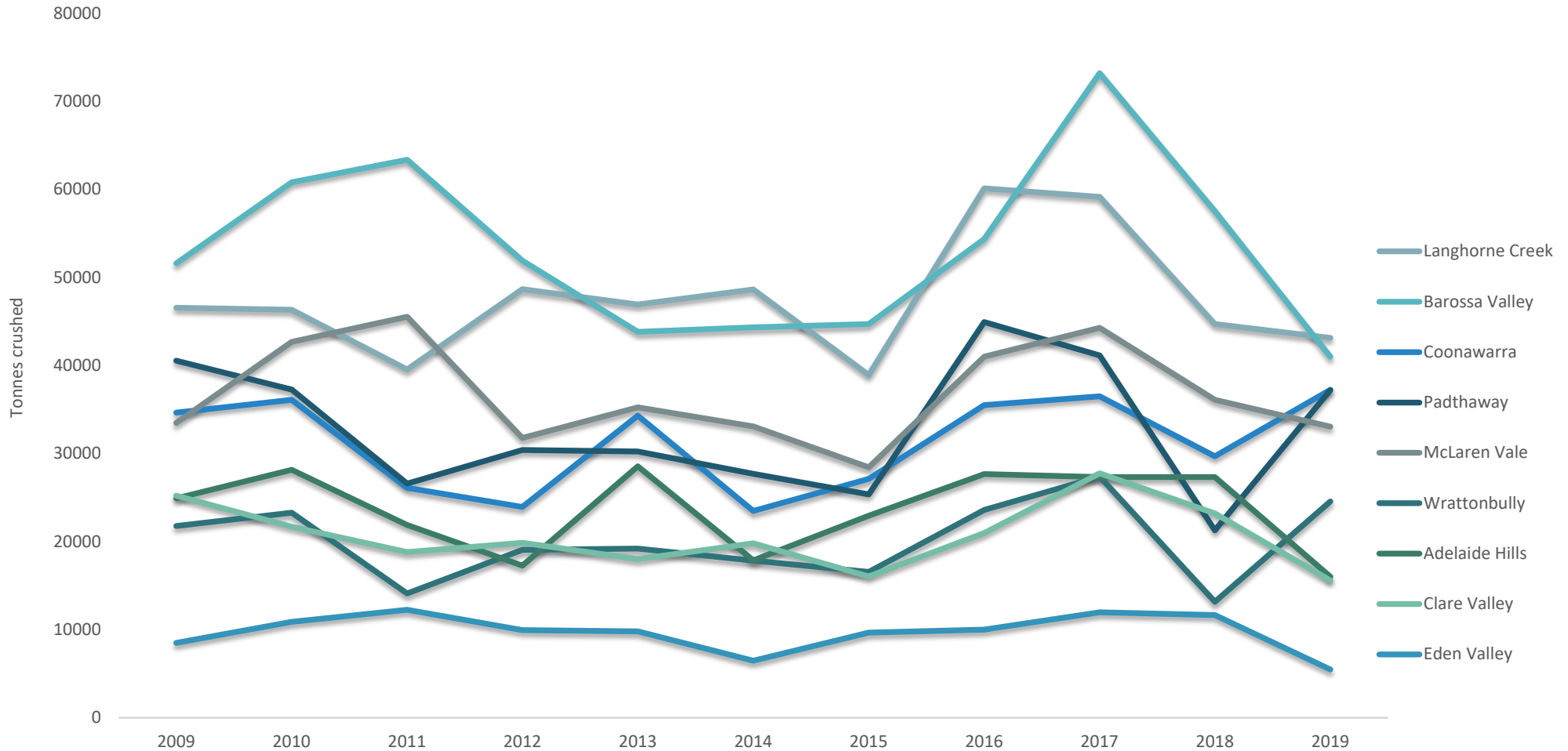
## Historical winegrape crush South Australia 2000 - 2019



# State summary 2019

## Vintage by region 2009 - 2019

*Riverland excluded due to scale differences*



# State summary 2019

## Total crush by GI region 2019 vs 2018

GI Region	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2019	Region share of state	Total crush 2018	% change
Adelaide Hills	3,284	12,718	16,002	2.1%	27,336	-41%
Adelaide Plains		2,964	2,964	0.4%	2,911	2%
Barossa Valley	14,681	25,487	40,169	5.2%	55,997	-28%
Barossa zone other	731	87	818	0.1%	1,516	-46%
Clare Valley	7,809	7,765	15,573	2.0%	23,198	-33%
Coonawarra	26,593	10,649	37,242	4.8%	29,692	25%
Currency Creek	1,883	1,256	3,139	0.4%	5,177	-39%
Eden Valley	2,804	2,672	5,477	0.7%	11,652	-53%
Fleurieu zone other	322	2,221	2,543	0.3%	2,760	-8%
Kangaroo Island	43	21	64	0.0%	138	-53%
Langhorne Creek	16,920	26,216	43,137	5.6%	44,695	-3%
Limestone Coast zone other	10,917	4,530	15,447	2.0%	9,652	60%
Lower Murray zone other	316	8,224	8,540	1.1%	5,409	58%
McLaren Vale	11,778	21,260	33,038	4.3%	36,110	-9%
Mount Benson	1,312	1,577	2,889	0.4%	2,813	3%
Mount Gambier		889	889	0.1%	1,134	-22%
Mount Lofty Ranges zone other	33	984	1,017	0.1%	1,350	-25%
Padthaway	14,392	22,823	37,215	4.8%	21,277	75%
Riverland	102,901	371,189	474,090	61.7%	447,410	6%
Robe	1,439	498	1,937	0.3%	2,879	-33%
Southern Fleurieu	47	798	845	0.1%	1,302	-35%
Southern Flinders Ranges	517	585	1,102	0.1%	717	54%
The Peninsulas		155	155	0.0%	199	-22%
Wrattonbully	14,783	9,790	24,573	3.2%	13,160	87%
<b>Total all regions</b>	<b>233,507</b>	<b>535,356</b>	<b>768,863</b>	<b>100%</b>	<b>748,484</b>	<b>3%</b>

# State summary 2019

## Vintage summary by GI region 2019

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2019	Est value of purchased grapes	Est value of all grapes
<b>Adelaide Hills</b>	Red	1,239	4,566	5,804	\$7,280,981	\$9,541,078
	White	2,046	8,152	10,198	\$12,044,785	\$15,020,648
	Total	3,284	12,718	16,002	\$19,325,766	\$24,561,726
<b>Adelaide Plains</b>	Red	0	2,150	2,150	\$2,197,094	\$2,197,094
	White	0	813	813	\$759,929	\$759,929
	Total	0	2,964	2,964	\$2,957,023	\$2,957,023
<b>Barossa Valley</b> inc Barossa Zone other	Red	14,636	22,567	37,203	\$48,511,181	\$81,021,416
	White	777	3,007	3,784	\$2,435,283	\$3,125,602
	Total	15,412	25,574	40,986	\$50,946,464	\$84,147,018
<b>Clare Valley</b>	Red	4,743	3,962	8,704	\$6,424,970	\$13,963,952
	White	3,066	3,803	6,869	\$4,237,518	\$7,725,029
	Total	7,809	7,765	15,573	\$10,662,488	\$21,688,981
<b>Coonawarra</b>	Red	23,001	9,455	32,455	\$14,895,426	\$50,362,543
	White	3,592	1,194	4,787	\$908,055	\$3,680,811
	Total	26,593	10,649	37,242	\$15,803,481	\$54,043,354
<b>Currency Creek</b>	Red	1,081	1,056	2,136	\$1,225,082	\$2,478,659
	White	802	200	1,003	\$157,548	\$706,139
	Total	1,883	1,256	3,139	\$1,382,630	\$3,184,798
<b>Eden Valley</b>	Red	914	1,179	2,093	\$2,829,981	\$5,059,909
	White	1,890	1,494	3,384	\$2,266,918	\$5,205,505
	Total	2,804	2,672	5,477	\$5,096,899	\$10,265,414
<b>Fleurieu zone - other</b> inc Southern Fleurieu and Kangaroo Island	Red	144	1,618	1,762	\$1,965,947	\$2,141,648
	White	268	1,422	1,690	\$1,002,565	\$1,195,981
	Total	412	3,040	3,452	\$2,968,512	\$3,337,629



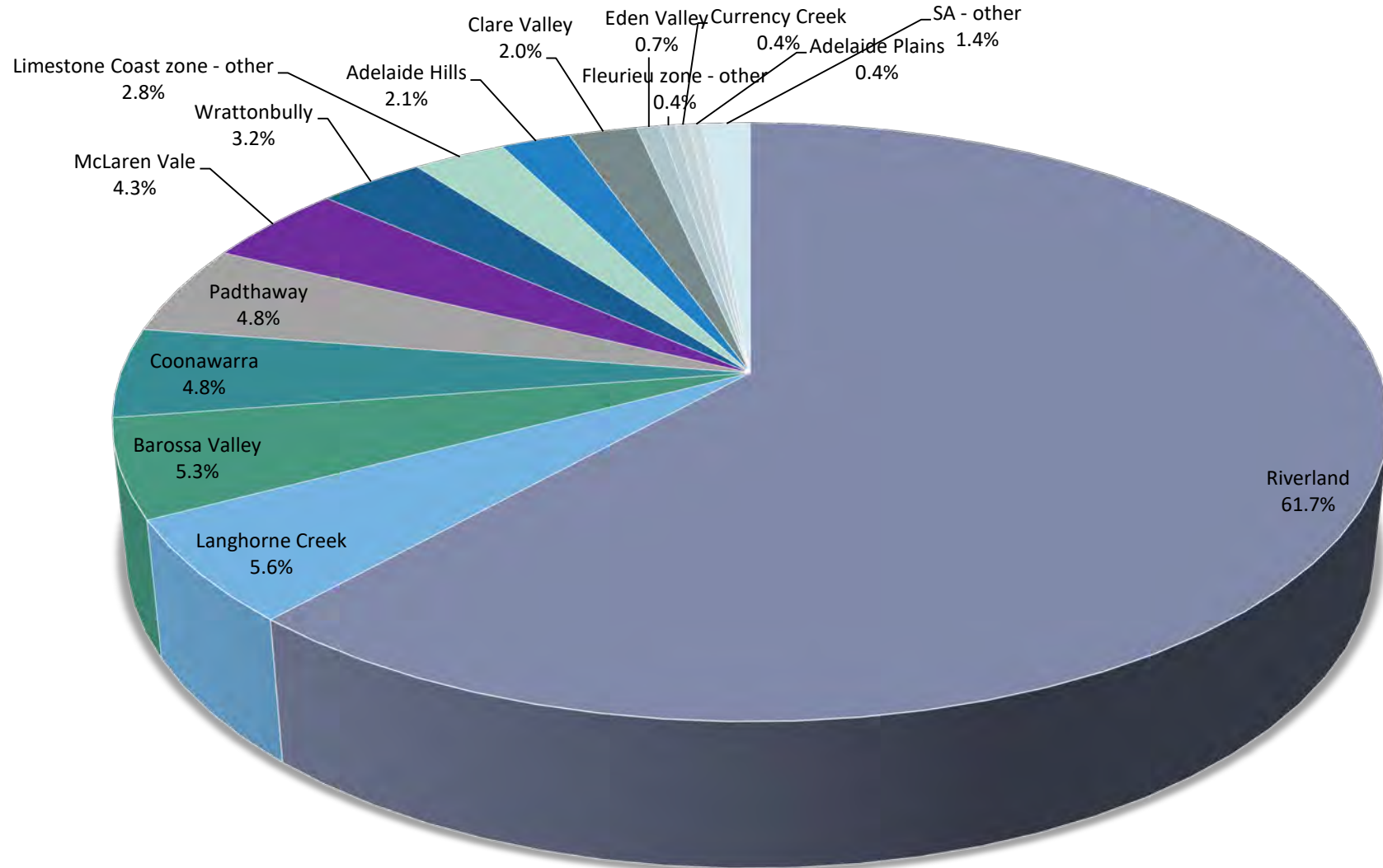
# State summary 2019

## Vintage summary by GI region 2019

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2019	Est value of purchased grapes	Est value of all grapes
<b>Langhorne Creek</b>	Red	13,862	21,911	35773	\$24,808,024	\$39,994,766
	White	3,058	4,305	7364	\$2,751,340	\$4,786,555
	Total	16,920	26,216	43137	\$27,559,364	\$44,781,321
<b>Limestone Coast zone - other</b> inc Robe, Mt Benson and Mt Gambier	Red	11,019	5,393	16,412	\$5,910,792	\$17,702,355
	White	2,650	2,100	4,750	\$1,815,821	\$3,916,261
	Total	13,669	7,493	21,162	\$7,726,613	\$21,618,616
<b>McLaren Vale</b>	Red	10,889	19,308	30,198	\$35,698,385	\$55,886,007
	White	888	1,952	2,840	\$1,964,202	\$3,070,171
	Total	11,778	21,260	33,038	\$37,662,586	\$58,956,178
<b>Padthaway</b>	Red	8,538	13,352	21,890	\$16,599,584	\$26,805,875
	White	5,854	9,471	15,325	\$7,085,776	\$11,718,754
	Total	14,392	22,823	37,215	\$23,685,360	\$38,524,629
<b>Riverland</b>	Red	64,028	190,699	254,727	\$113,968,905	\$152,122,110
	White	38,873	180,490	219,363	\$61,141,900	\$74,527,296
	Total	102,901	371,189	474,090	\$175,110,805	\$226,649,406
<b>Wrattonbully</b>	Red	10,810	8,101	18,911	\$11,092,616	\$25,507,594
	White	3,973	1,689	5,662	\$1,295,947	\$4,713,294
	Total	14,783	9,790	24,573	\$12,388,564	\$30,220,888
<b>SA - other</b> inc The Peninsulas and Southern Flinders Ranges	Red	861	4,639	5,500	\$4,151,136	\$4,961,022
	White	5	5,309	5,314	\$1,970,850	\$1,978,350
	Total	866	9,948	10,814	\$6,121,986	\$6,939,372
<b>All winegrapes</b>	<b>Total</b>	<b>233,507</b>	<b>535,356</b>	<b>768,863</b>	<b>\$399,398,539</b>	<b>\$631,876,353</b>

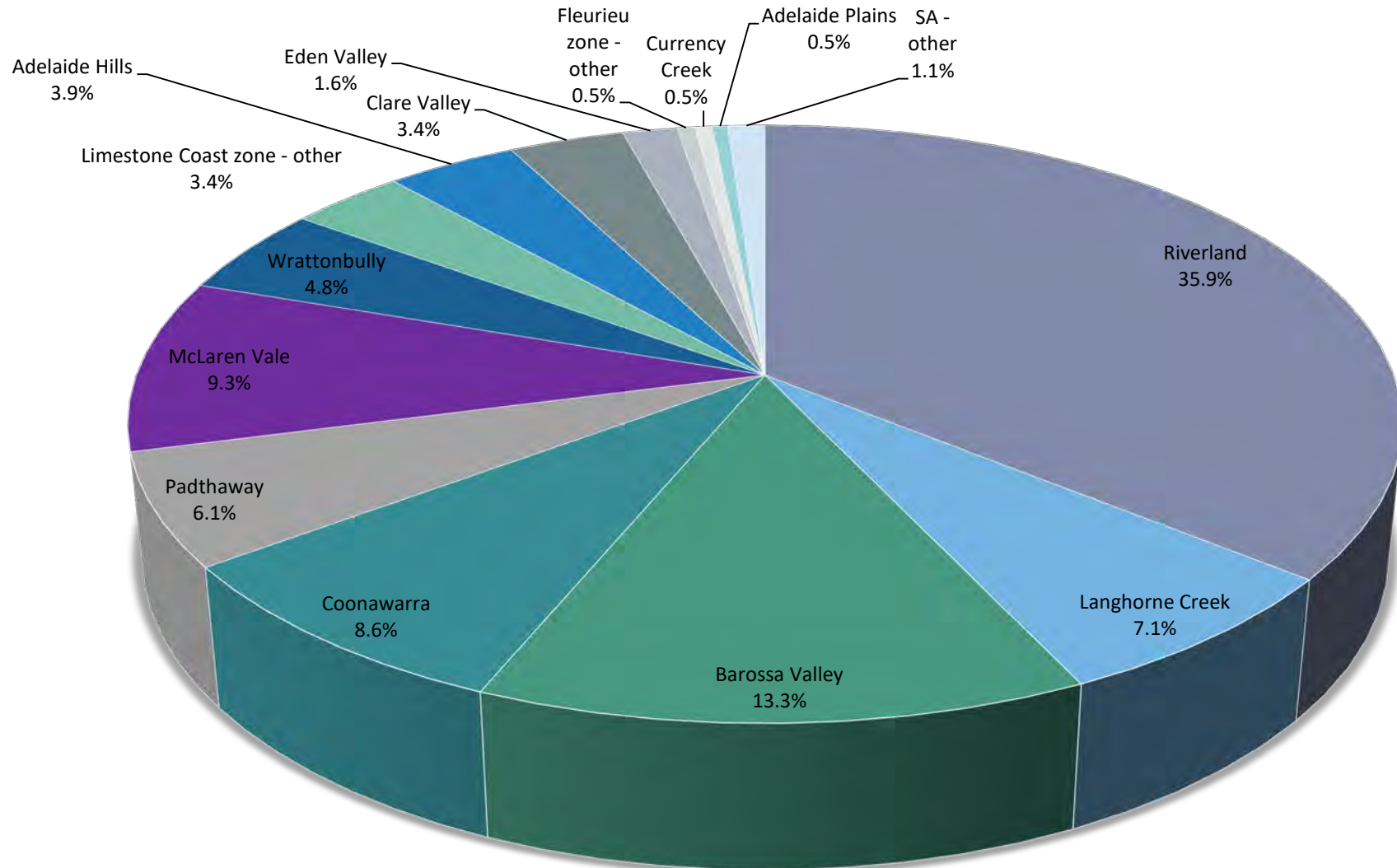
# State summary 2019

## Crush by region volume share 2019



# State summary 2019

## Crush by region value share 2019

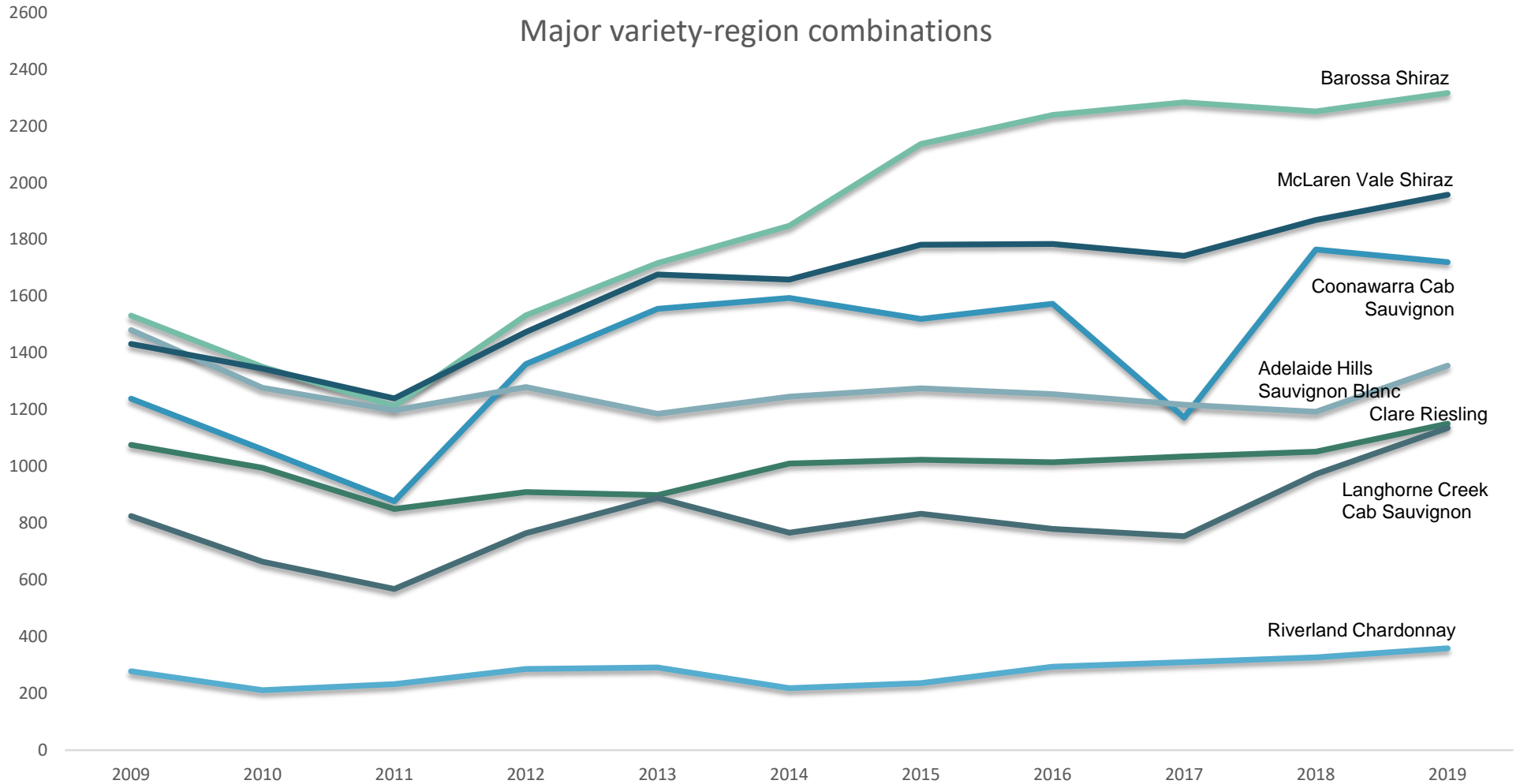


# State summary 2019

## Historical weighted average prices – 2009 - 2019

Average price (\$ per tonne)

Major variety-region combinations

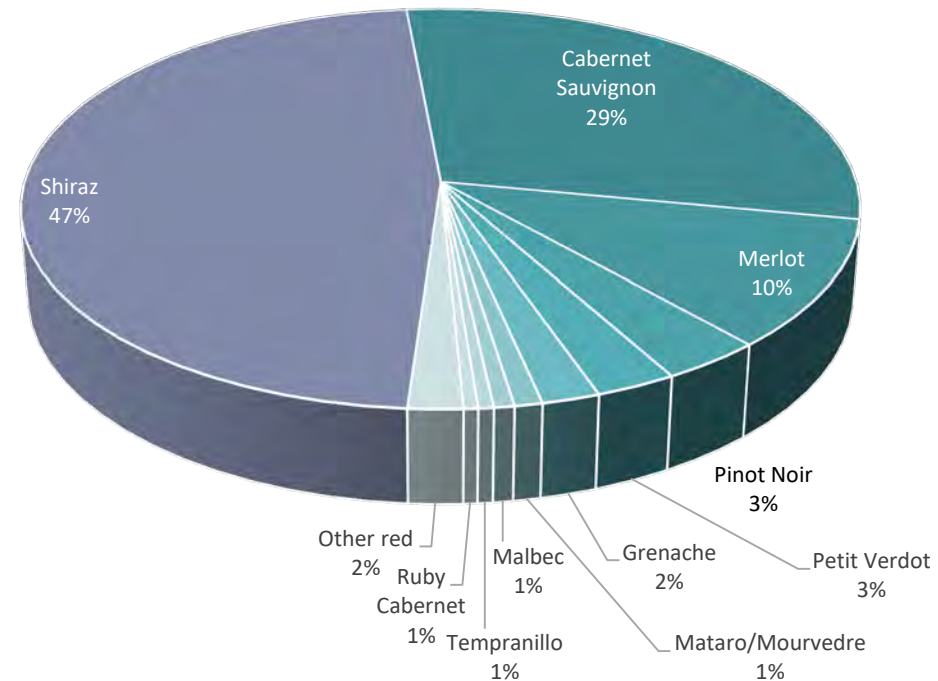


# State summary 2019

## Vintage summary by variety 2019 – red winegrapes

Variety	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2019	Purchased as share of total
Red				
Barbera	29	34	63	54%
Cabernet Franc	560	199	759	26%
Cabernet Sauvignon	51,425	88,823	140,248	63%
Dolcetto	37	193	230	84%
Durif	747	872	1,619	54%
Grenache	1,859	7,541	9,400	80%
Lagrein	4	85	88	96%
Malbec	1,836	1,457	3,293	44%
Mataro/Mourvedre	728	3,788	4,516	84%
Merlot	22,013	27,391	49,404	55%
Montepulciano	108	190	299	64%
Muscat Rouge a Petits Grains	13	287	300	96%
Nero d'Avola	41	81	122	67%
Petit Verdot	5,730	7,458	13,188	57%
Pinot Meunier	38	191	229	83%
Pinot Noir	3,344	13,167	16,511	80%
Ruby Cabernet	1,178	1,123	2,301	49%
Sangiovese	858	760	1,618	47%
Shiraz	72,951	152,533	225,484	68%
Tarrango		192	192	100%
Tempranillo	548	1,942	2,489	78%
Other red	1,718	1,647	3,365	49%
<b>Red Total</b>	<b>165,764</b>	<b>309,954</b>	<b>475,718</b>	<b>65%</b>

Share of red crush by variety

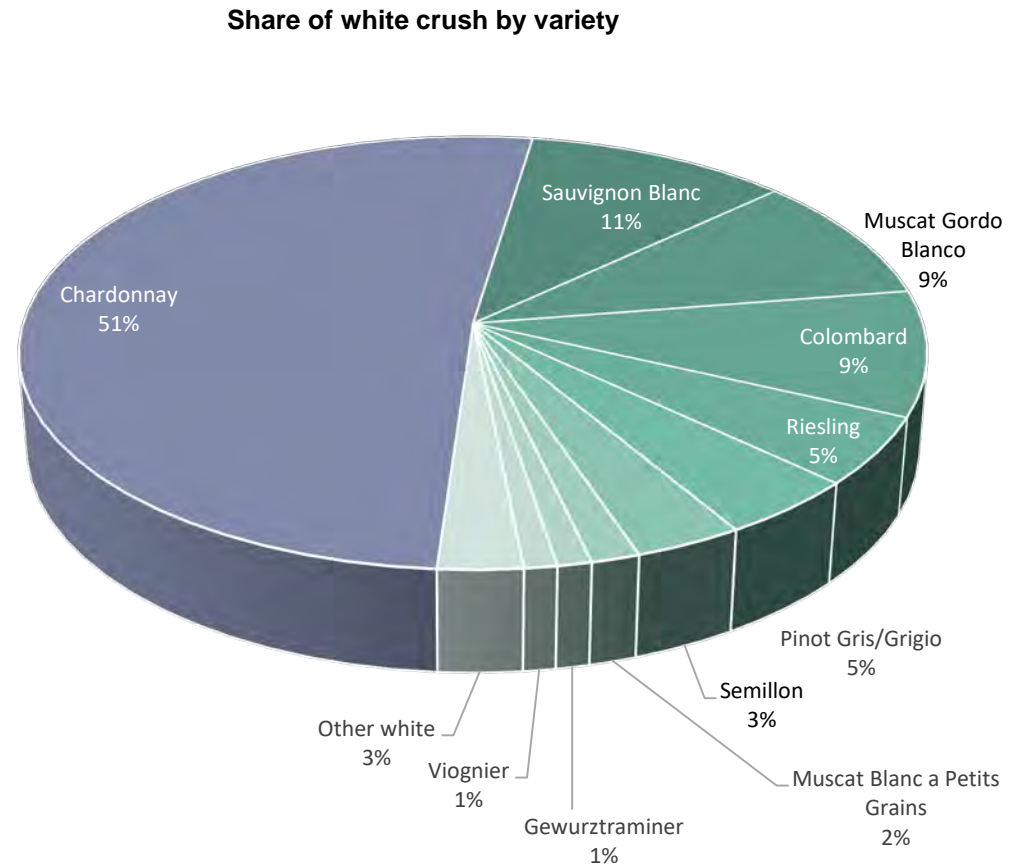




# State summary 2019

## Vintage summary by variety 2019 – white winegrapes

Variety	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2019	Purchased as share of total
White				
Canada Muscat	55	27	82	33%
Chardonnay	31,011	119,340	150,350	79%
Chenin blanc	17	1,676	1,693	99%
Colombard	3,515	23,866	27,382	87%
Doradillo	25	114	139	82%
Fiano	132	188	319	59%
Gewurztraminer	1,893	1,269	3,163	40%
Gruener Veltliner	154	62	216	29%
Marsanne	46	62	108	57%
Moscato Giallo	5	83	88	94%
Muscadelle (Tokay)	43	12	55	22%
Muscat Blanc a Petits Grains	525	3,960	4,485	88%
Muscat Gordo Blanco	3,573	24,070	27,643	87%
Pinot Gris/Grigio	4,573	8,432	13,005	65%
Prosecco	18	337	355	95%
Riesling	7,872	7,010	14,882	47%
Roussanne	29	36	65	56%
Sauvignon Blanc	7,621	23,737	31,358	76%
Semillon	4,098	5,934	10,032	59%
Sultana		434	434	100%
Verdelho	1,101	1,146	2,247	51%
Vermentino	287	768	1,055	73%
Viognier	766	2,269	3,035	75%
Other white	385	571	955	60%
<b>White Total</b>	<b>67,743</b>	<b>225,402</b>	<b>293,145</b>	<b>77%</b>
<b>Grand Total</b>	<b>233,507</b>	<b>535,356</b>	<b>768,863</b>	<b>70%</b>



# State summary 2019

## Current plantings by variety and year planted – white winegrapes

Variety	Year planted				Total % planted	
	Pre-2016	2016	2017	2018	area	in 2018
<b>White winegrapes</b>						
Chardonnay	8,598	16	12	28	8,654	0%
Chenin Blanc	110	0	0	0	110	0%
Colombard	782	0	0	0	782	0%
Doradillo	36	0	0	0	36	0%
Fiano	45	7	1	3	56	6%
Marsanne	22	0	0	1	22	2%
Muscadelle (Tokay)	22	0	0	0	22	0%
Muscat A Petits Grains Blanc (White Frontignac)	183	0	0	0	183	0%
Muscat Gordo Blanco	900	2	2	0	904	0%
Palomino	25	0	0	0	25	0%
Pedro Ximenez	13	0	0	0	13	0%
Pinot Gris/Grigio	989	54	39	58	1,140	5%
Riesling	2,309	48	13	6	2,375	0%
Roussanne	23	0	0	1	23	2%
Sauvignon Blanc	2,288	20	27	8	2,344	0%
Savagnin	34	0	0	0	34	0%
Semillon	887	0	0	0	887	0%
Sultana	125	0	0	0	125	0%
Traminer (Gewurztraminer)	216	0	0	0	216	0%
Trebbiano	14	0	0	0	14	0%
Verdelho	174	0	0	0	174	0%
Vermentino	45	0	0	0	45	1%
Viognier	343	2	0	0	345	0%
Other White	131	4	9	7	151	5%
<b>TOTAL WHITE VARIETIES</b>	<b>18,314</b>	<b>153</b>	<b>103</b>	<b>112</b>	<b>18,680</b>	<b>1%</b>

Source:  
Vinehealth  
Australia

# State summary 2019

## Current plantings by variety and year planted – red winegrapes and total

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>Red winegrapes</b>						
Barbera	29	1	0	0	30	0%
Cabernet Franc	165	2	3	0	171	0%
Cabernet Sauvignon	17,018	118	216	180	17,532	1%
Durif (Petite Sirah)	59	6	15	3	83	4%
Grenache	1,555	11	12	10	1,588	1%
Malbec	369	8	9	5	392	1%
Mataro (Mourvedre)	690	14	15	5	724	1%
Merlot	3,854	4	7	22	3,887	1%
Meunier (Pinot Meunier)	39	0	0	0	39	0%
Montepulciano	48	4	6	1	58	2%
Nebbiolo	32	1	0	2	35	6%
Petit Verdot	684	0	3	0	687	0%
Pinot Noir	1,566	10	10	9	1,596	1%
Ruby Cabernet	129	0	0	0	129	0%
Sagrantino	12	0	0	0	12	0%
Sangiovese	186	0	5	2	193	1%
Shiraz	26,638	388	336	311	27,673	1%
Tempranillo	324	7	9	1	342	0%
Touriga	39	7	5	0	51	0%
Zinfandel	28	0	0	0	29	0%
Other Red	294	8	11	11	324	3%
<b>TOTAL RED VARIETIES</b>	<b>53,758</b>	<b>589</b>	<b>662</b>	<b>562</b>	<b>55,575</b>	<b>1%</b>
Unknown/non-winegrape varieties	1,108	22	85	18	1,233	1%
<b>TOTAL ALL VARIETIES</b>	<b>73,180</b>	<b>764</b>	<b>850</b>	<b>692</b>	<b>75,488</b>	<b>1%</b>

Source:  
Vinehealth  
Australia

# State summary 2019

## Current plantings by region and year planted

Zone	Region	Year planted				Total area (ha)	% planted in 2018
		Pre-2016	2016	2017	2018		
Barossa	Barossa Valley (inc Barossa zone other)	11,173	203	197	129	11,702	1%
	Eden Valley	2,184	56	27	66	2,333	3%
	<b>Total for Barossa</b>	<b>13,357</b>	<b>259</b>	<b>224</b>	<b>195</b>	<b>14,035</b>	<b>1%</b>
Far North	Southern Flinders Ranges	190	0	0	0	190	0%
	<b>Total for Far North</b>	<b>190</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>190</b>	<b>0%</b>
Fleurieu	Currency Creek	995	0	0	0	995	0%
	Fleurieu zone - other	232	0	0	4	236	2%
	Kangaroo Island	147	0	6	0	153	0%
	Langhorne Creek	5,839	51	8	60	5,959	1%
	McLaren Vale	7,139	59	81	55	7,337	1%
	Southern Fleurieu	461	0	0	0	461	0%
	<b>Total for Fleurieu</b>	<b>14,813</b>	<b>110</b>	<b>95</b>	<b>119</b>	<b>15,141</b>	<b>1%</b>
Limestone Coast	Bordertown	1,252	0	0	0	1,252	0%
	Coonawarra	5,682	5	18	21	5,726	0%
	Limestone Coast zone - other	590	0	0	0	590	0%
	Mount Benson	492	4	0	7	503	1%
	Mount Gambier	249	0	0	0	249	0%
	Padthaway	3,749	25	99	8	3,881	0%
	Robe	704	0	0	34	738	5%
	Wrattonbully	2,650	10	14	4	2,678	0%
	<b>Total for Limestone Coast</b>	<b>15,368</b>	<b>44</b>	<b>131</b>	<b>74</b>	<b>15,617</b>	<b>0%</b>
Lower Murray	Lower Murray zone - other	406	0	2	2	410	0%
	Riverland	19,628	229	289	220	20,366	1%
	<b>Total for Lower Murray</b>	<b>20,034</b>	<b>229</b>	<b>291</b>	<b>222</b>	<b>20,776</b>	<b>1%</b>
Mount Lofty Ranges	Adelaide Hills	3,674	36	62	58	3,830	2%
	Adelaide Plains	481	5	0	0	486	0%
	Clare Valley	4,861	77	46	32	5,016	1%
	Mount Lofty Ranges zone - other	328	2	0	0	330	0%
	<b>Total for Mount Lofty Ranges</b>	<b>9,344</b>	<b>120</b>	<b>108</b>	<b>90</b>	<b>9,662</b>	<b>1%</b>
The Peninsulas	The Peninsulas	67	0	0	0	67	0%
	<b>Total for The Peninsulas</b>	<b>67</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>67</b>	<b>0%</b>
	<b>Total for all GIs</b>	<b>73,173</b>	<b>762</b>	<b>849</b>	<b>700</b>	<b>75,488</b>	<b>1%</b>

Source:  
Vinehealth  
Australia

# State summary 2019

## Number of registered owners by region and property size

Zone	Region	<10 ha		10-24 ha		25-49 ha		50-99 ha		100+ ha		Total	
		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	1,359	337	2,217	141	2,420	72	1,341	20	4,126	17	11,464	587
	Barossa zone - other	17	3	12	1	0	0	84	1	126	1	238	6
	Eden Valley	405	93	508	34	350	11	365	5	705	3	2,333	146
Far North	Southern Flinders Ranges	17	6	120	7	0	0	53	1	0	0	190	14
Fleurieu	Currency Creek	49	9	179	12	151	4	65	1	551	2	995	28
	Fleurieu zone - other	23	8	43	3	0	0	170	2	0	0	236	13
	Kangaroo Island	115	21	38	3	0	0	0	0	0	0	153	24
	Langhorne Creek	114	23	276	18	935	27	1,176	17	3,458	11	5,959	96
	McLaren Vale	1,547	363	1,696	108	1,392	43	1,228	17	1,475	6	7,337	537
	Southern Fleurieu	112	33	55	5	227	6	68	1	0	0	461	45
Limestone Coast	Bordertown	0	0	0	0	39	1	0	0	1,214	4	1,252	5
	Coonawarra	277	49	468	31	659	19	935	14	3,388	9	5,726	122
	Limestone Coast - other	50	12	66	4	27	1	202	3	244	2	590	22
	Mount Benson	24	4	85	5	60	2	207	3	128	1	503	15
	Mount Gambier	51	14	36	3	64	2	98	1	0	0	249	20
	Padthaway	19	3	56	4	302	8	594	8	2,910	13	3,881	36
	Robe	18	2	41	2	81	2	54	1	544	3	738	10
	Wrattobully	84	14	245	14	605	15	330	4	1,413	5	2,678	52
Lower Murray	Lower Murray zone - other	49	14	199	11	162	5	0	0	0	0	410	30
	Riverland	2,600	538	4,228	266	2,709	78	2,387	34	8,442	36	20,366	952
Mount Lofty Ranges	Adelaide Hills	710	191	945	57	965	29	831	12	378	3	3,830	292
	Adelaide Plains	124	40	113	9	171	4	78	1	0	0	486	54
	Clare Valley	599	167	761	45	918	25	782	10	1,956	10	5,016	257
	Mount Lofty Ranges - other	91	27	47	3	104	3	88	1	0	0	330	34
The Peninsulas	The Peninsulas	13	4	21	2	33	1	0	0	0	0	67	7
Totals by size category		8,467	1,975	12,455	788	12,372	358	11,136	157	31,058	126		
Total for SA												75,488	3,296

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

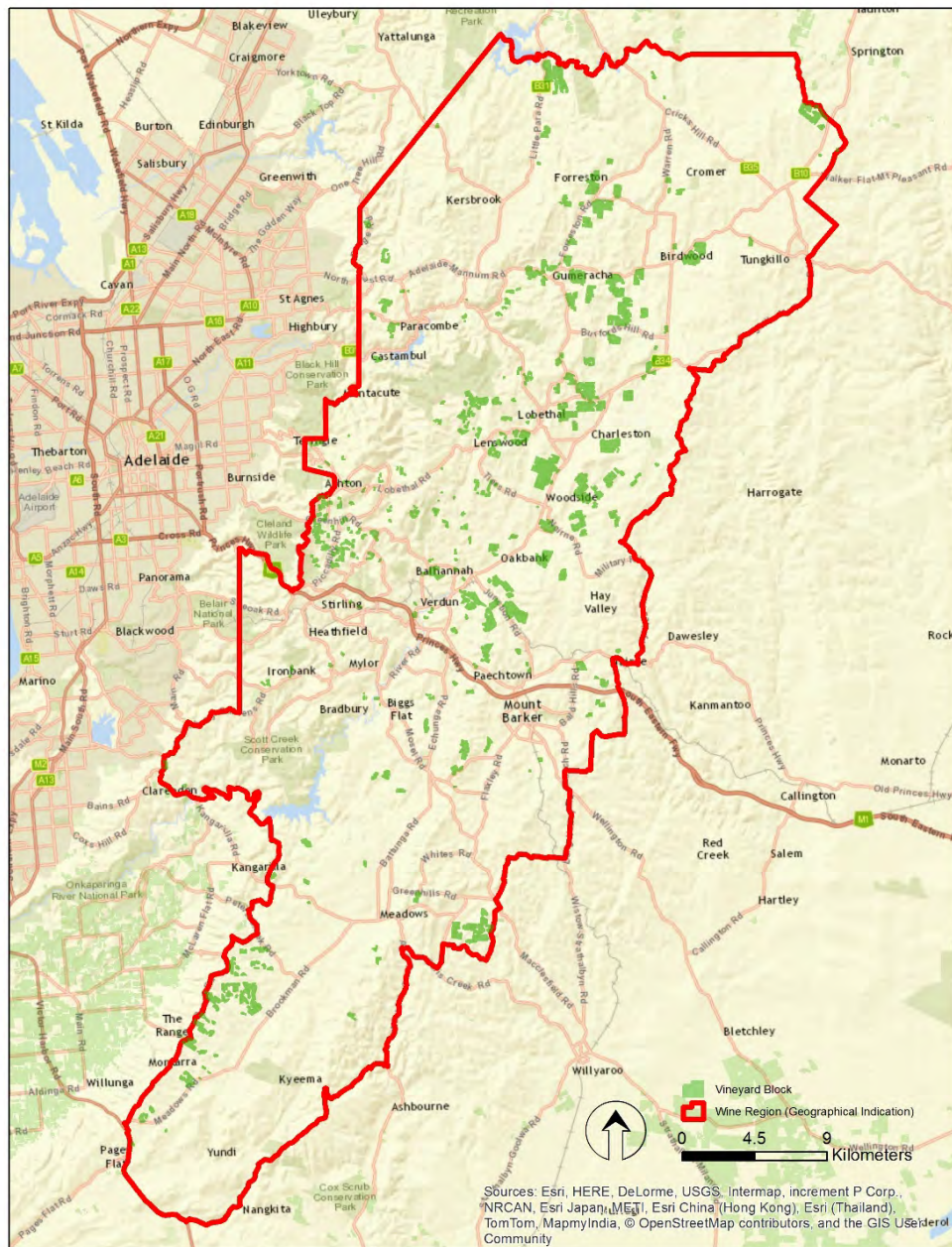


# SA Winegrape Crush Survey 2019

## Regional Summary Report

### Adelaide Hills Wine Region

*Wine Australia July 2019*



DATUM: GDA94  
PROJECTION: MGA Zone 54  
DATE: 8<sup>th</sup> 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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# Adelaide Hills

## Vintage overview

### VINTAGE REPORT

Vintage 2019 in the Adelaide Hills was disappointing for grape growers as it returned the lowest grape yield for many seasons, being only around 50 per cent of the total harvested in the previous season. However, winemakers were pleased with the wine, apart from the low volume, as the region escaped the influence of the extreme January heat, seen across Australia, and had a long slow ripening in autumn.

The previous winter began with unseasonably dry conditions but fortunately above average rainfall in June and August ensured close to optimal soil moisture at budburst. Growing season rainfall was low, being 43 per cent of the Long-Term Average. This meant that disease and pest issues were minimal for the 2018/19 season. Despite conditions being cold early in the season, soil temperatures rose steadily ensuring an even budburst and good development of flowers, leaving grape growers hopeful of at least an average crop potential. However, unseasonably cold conditions over 3 days at the beginning of flowering resulted in poor set in varieties that were in full flower, as well as causing cold damage to flowers that had not yet fully developed.

Although the Adelaide Hills region joined the rest of Australia with record temperatures on January 24, the region only experienced two short heatwaves of 4 days with cooler conditions between heat spikes, which allowed vines to fully recover. In contrast to many regions there was very little sunburn on either fruit or leaves as grape berries had not yet reached veraison, when berries are particularly heat-susceptible. This, combined with a mild autumn, resulted in good flavour and colour development, albeit with a small crop.

*Richard Hamilton, Adelaide Hills Wine*

### OVERVIEW OF VINTAGE STATISTICS

A total of 16,002 tonnes of Adelaide Hills winegrapes was crushed in 2019, a reduction of 41 per cent compared with the 2018 crush of 27,318 tonnes.

There were 75 respondents to the survey who reported crushing grapes from the Adelaide Hills in 2019, compared with 80 in 2018.

The 2019 crush is 35 per cent below the five-year average crush from the region (24,628 tonnes). The maximum over that timeframe was 27,670 tonnes in 2016 and the minimum was 17,873 tonnes in 2014.

The total value of winegrapes decreased by \$13 million to \$24.6 million as a result of the lower crop, while the average value of grapes increased overall by 11 per cent.

The average price paid for Adelaide Hills' largest variety, Sauvignon Blanc, increased by 14 per cent to \$1356 per tonne, while Chardonnay increased by 15 per cent to \$1635 per tonne and overtook Pinot Noir for the first time since 2005. Pinot Noir increased by 6 per cent to \$1607 per tonne, Merlot increased by 21 per cent to \$1035 per tonne and Shiraz increased by 17 per cent to \$2121 per tonne.

The price dispersion data shows that 50 per cent of red varieties were purchased at \$1500 and above compared with 43 per cent in 2018. For the whites, the proportion sold at \$1500 and above increased from 30 per cent to 47 per cent.

There were 58 hectares of new vines planted in the 2018 planting season compared with 62 hectares the previous year. Half of these plantings were red varieties, with Shiraz and Pinot Noir being the most planted. The total area planted in the region as at 30 April 2019 is 3,830 hectares, very similar to the area 5 years ago of 3,931 hectares.

# Adelaide Hills

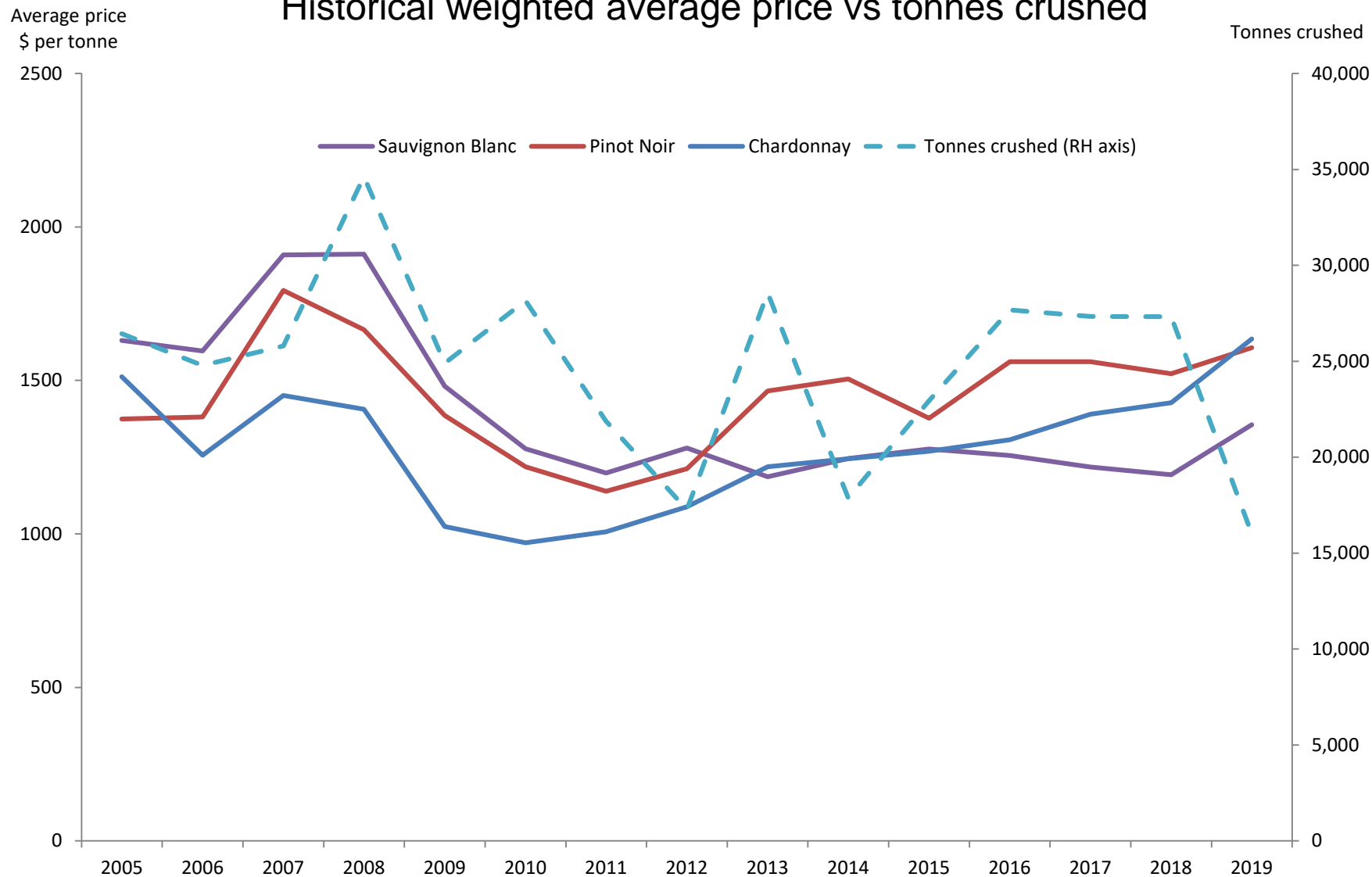
## Winegrape intake summary table

	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	3					3			-100%	13	83%	15	\$33,290
Cabernet Franc	2				2					17	89%	20	\$31,250
Cabernet Sauvignon	198			47	104	47	\$350,883	\$1,775	11%	178	47%	376	\$667,271
Dolcetto										4	100%	4	\$2,633
Malbec	3				3						0%	3	\$4,640
Mataro/Mourvedre										7	100%	7	\$10,406
Merlot	611			562	48		\$631,848	\$1,035	21%	26	4%	637	\$659,037
Montepulciano	15				7	8	\$32,207	\$2,113	4%		0%	15	\$32,207
Nero d'Avola	7					7					0%	7	\$14,260
Pinot Meunier	137			61	66	10	\$212,056	\$1,551	2%		0%	137	\$212,056
Pinot Noir	3,062			1,530	1,082	450	\$4,921,309	\$1,607	6%	494	14%	3,556	\$5,714,360
Sangiovese	14			7	3	4	\$21,326	\$1,498	10%	1	6%	15	\$22,734
Shiraz	451			71	120	260	\$956,242	\$2,121	17%	431	49%	882	\$1,871,259
Tempranillo	32				25	7	\$62,743	\$1,979	17%	19	37%	51	\$100,324
Other red	31				9	22	\$64,120	\$2,067	1%	49	61%	80	\$165,352
Red Total	4,566			2,279	1,470	817	\$7,280,981	\$1,595	6%	1,239	21%	5,804	\$9,541,078
White													
Chardonnay	3,240			1,365	1,331	545	\$5,297,232	\$1,635	15%	526	14%	3,766	\$6,156,754
Chenin blanc	4			4							0%	4	\$5,600
Fiano	12				10	2					0%	12	\$22,268
Gewurztraminer	49			40	7	3	\$47,717	\$973	15%	5	9%	54	\$52,626
Gruner Veltliner	60				21	39	\$117,865	\$1,973	9%	39	40%	99	\$195,175
Muscat Blanc a Petits Grains	10			10							0%	10	\$7,680
Pinot Gris/Grigio	770			386	296	88	\$1,182,420	\$1,536	6%	317	29%	1,087	\$1,669,274
Prosecco	61			55	6		\$60,498	\$984		16	21%	77	\$76,209
Riesling	248		4	141	70	33	\$320,960	\$1,293	14%	46	16%	294	\$380,679
Sauvignon Blanc	3,585			2,233	1,232	120	\$4,859,852	\$1,356	14%	1,008	22%	4,592	\$6,225,878
Semillon	86		20	51	16		\$85,801	\$994	66%	55	39%	142	\$140,600
Vermentino	6			6							0%	6	\$6,589
Viognier	7			5	2		\$8,402	\$1,211	14%	7	52%	14	\$17,386
Other white	14				14		\$21,900	\$1,595	35%	26	66%	40	\$63,929
White Total	8,152		24	4,295	3,003	830	\$12,044,785	\$1,478	13%	2,046	20%	10,198	\$15,020,648
Grand Total	12,718		24	6,573	4,473	1,647	\$19,325,766	\$1,520	11%	3,284	21%	16,002	\$24,561,726

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

## Historical weighted average price vs tonnes crushed



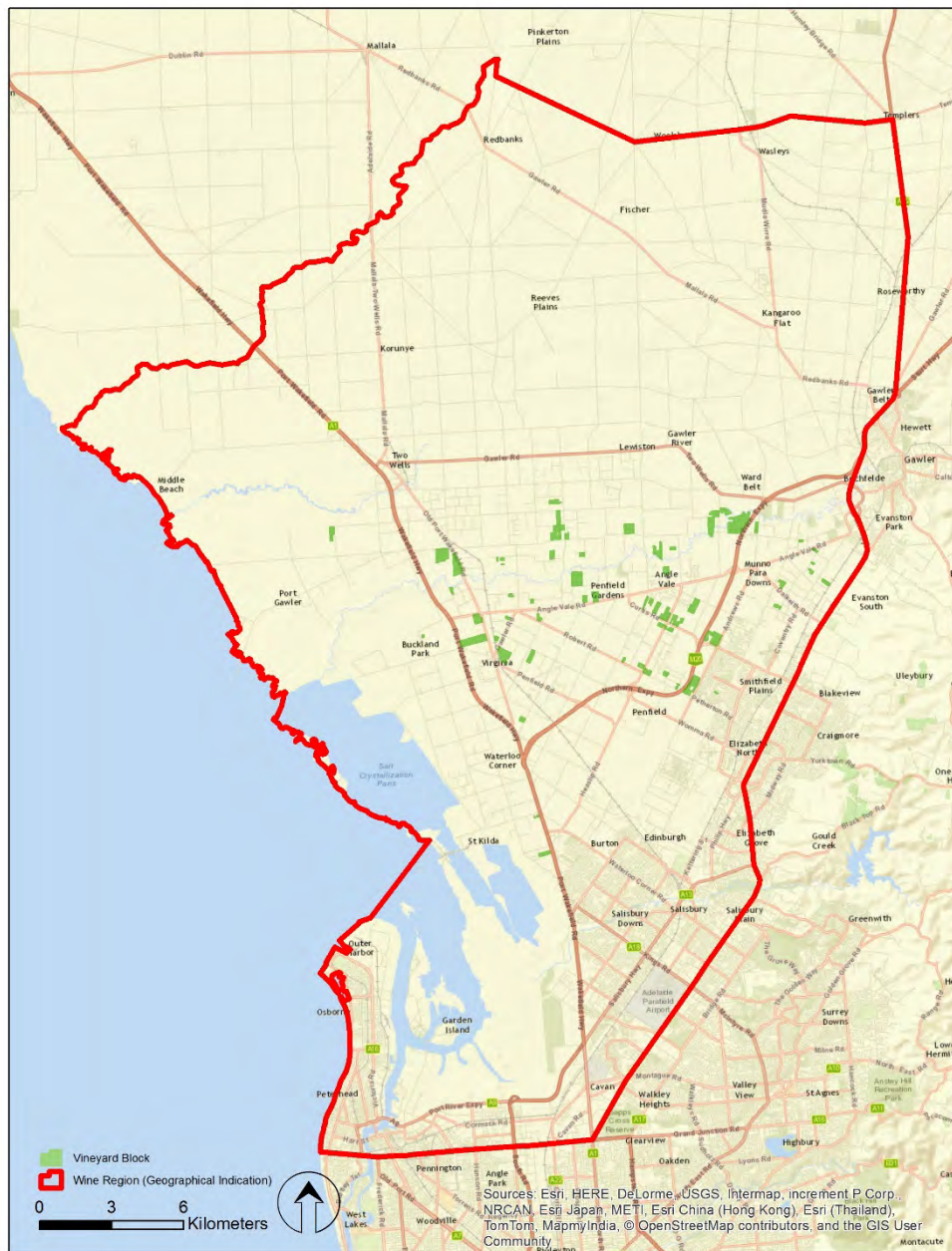
# Adelaide Hills

## Current plantings by variety and year planted

	Year planted				Total area	% planted in 2018
Variety	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Franc	8	0	0	0	8	0%
Cabernet Sauvignon	196	3	18	0	217	0%
Grenache	2	0	0	0	2	0%
Merlot	144	0	0	0	144	0%
Meunier (Pinot Meunier)	25	0	0	0	25	0%
Nebbiolo	10	0	0	2	12	17%
Pinot Noir	646	10	7	9	672	1%
Sangiovese	13	0	0	1	14	7%
Shiraz	365	9	4	14	392	4%
Tempranillo	30	1	2	0	33	0%
Other Red	34	1	0	4	39	10%
TOTAL RED WINEGRAPES	1473	24	31	30	1558	2%
White winegrapes						
Chardonnay	804	8	10	4	826	0%
Gruner Veltliner	18	0	1	0	19	0%
Pinot Gris/Grigio	249	0	5	5	259	2%
Riesling	55	0	1	1	57	2%
Sauvignon Blanc	921	2	11	0	934	0%
Semillon	40	0	0	0	40	0%
Traminer (Gewurztraminer)	20	0	0	0	20	0%
Viognier	21	0	0	0	21	0%
Other White	38	1	3	3	45	7%
TOTAL WHITE WINEGRAPES	2166	11	31	13	2221	1%
Rootstock Block	2	0	0	0	2	0%
Unknown variety	33	1	0	15	49	31%
TOTAL ALL VARIETIES	3674	36	62	58	3830	2%

Source: Vinehealth Australia





# SA Winegrape Crush Survey 2019

## Regional Summary Report

## Adelaide Plains Wine Region

*Wine Australia July 2019*

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

## Adelaide Plains Wine Region



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# Adelaide Plains

## Vintage overview

### OVERVIEW OF VINTAGE STATISTICS

A total of 2,964 tonnes of Adelaide Plains winegrapes was crushed in 2019, up 2 per cent on the 2018 crush.

There were 10 survey respondents who reported crushing grapes from the Adelaide Plains in 2019, compared with 11 in 2018.

The five-year average crush from this region (2014-2018) is 3,651 tonnes, meaning that the 2019 yield overall was 19 per cent below the average but slightly above the minimum crush over the period which was 2,911 tonnes in 2018. The maximum crush of 4,396 tonnes was recorded in 2016.

The total value of winegrapes increased from \$2.6 million in 2018 to just below \$3 million as a result of the higher tonnage and an overall increase in the average grape price of 10 per cent. For most varieties the average price paid increased for the second year in a row. Shiraz increased by 12 per cent to \$1068 per tonne, Merlot by 11 per cent to 822 per tonne and Cabernet Sauvignon by 11 per cent to \$1054 per tonne.

The price dispersion data shows an upward shift in prices, with 81 per cent of the red tonnage purchased at between \$600 and \$1500 compared with 87 per cent last year, while 15 per cent was purchased at over \$1500 compared with 10 per cent in 2018. For the whites, 90 per cent was purchased at between \$600 and \$1500 per tonne.

There were no new plantings reported in the Adelaide Plains in the 2018 planting season. The total area planted as at 30 April 2019 is 486 hectares compared with 472 hectares reported in 2018, and is 26 per cent 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+							
<b>Red</b>									0				
Cabernet Sauvignon	261			215	46		\$274,615	\$1,054	11%		0%	261	\$274,615
Grenache	97			97			\$72,292	\$744			0%	97	\$72,292
Mataro/Mourvedre	70			20	50						0%	70	\$105,792
Merlot	123			111	11		\$100,653	\$822	11%		0%	123	\$100,653
Montepulciano	1				1						0%	1	\$1,365
Pinot Noir	92		82	10							0%	92	\$47,130
Sangiovese	40			40							0%	40	\$26,007
Shiraz	1,450			1,229	221		\$1,548,736	\$1,068	12%		0%	1,450	\$1,548,736
Tempranillo	16			16							0%	16	\$18,960
Other red	1				1						0%	1	\$1,545
<b>Red Total</b>	<b>2,150</b>		<b>82</b>	<b>1,738</b>	<b>330</b>		<b>\$2,197,094</b>	<b>\$1,022</b>	<b>12%</b>		<b>0%</b>	<b>2,150</b>	<b>\$2,197,094</b>
<b>White</b>													\$0
Chardonnay	176		46	131							0%	176	\$131,056
Chenin blanc	33		33								0%	33	\$11,610
Pinot Gris/Grigio	265			265							0%	265	\$277,155
Sauvignon Blanc	320			320			\$313,144	\$978	11%		0%	320	\$313,144
Viognier	19			19							0%	19	\$26,964
<b>White Total</b>	<b>813</b>		<b>79</b>	<b>734</b>			<b>\$759,929</b>	<b>\$934</b>	<b>7%</b>		<b>0%</b>	<b>813</b>	<b>\$759,929</b>
<b>Grand Total</b>	<b>2,964</b>		<b>161</b>	<b>2,473</b>	<b>330</b>		<b>\$2,957,023</b>	<b>\$998</b>	<b>10%</b>		<b>0%</b>	<b>2,964</b>	<b>\$2,957,023</b>

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

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	53	0	0	0	53	0%
Grenache	20	0	0	0	20	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	31	0	0	0	31	0%
Pinot Noir	13	0	0	0	13	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	220	0	0	0	220	0%
Other Red	15	0	0	0	15	0%
TOTAL RED WINEGRAPES	367	0	0	0	367	0%
White winegrapes						
Chardonnay	27	0	0	0	27	0%
Pinot Gris/Grigio	30	3	0	0	33	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	26	0	0	0	26	0%
Other White	13	2	0	0	15	0%
TOTAL WHITE WINEGRAPES	103	5	0	0	108	0%
Unknown variety	11	0	0	0	11	0%
TOTAL ALL VARIETIES	481	5	0	0	486	0%

Source:  
Vinehealth  
Australia

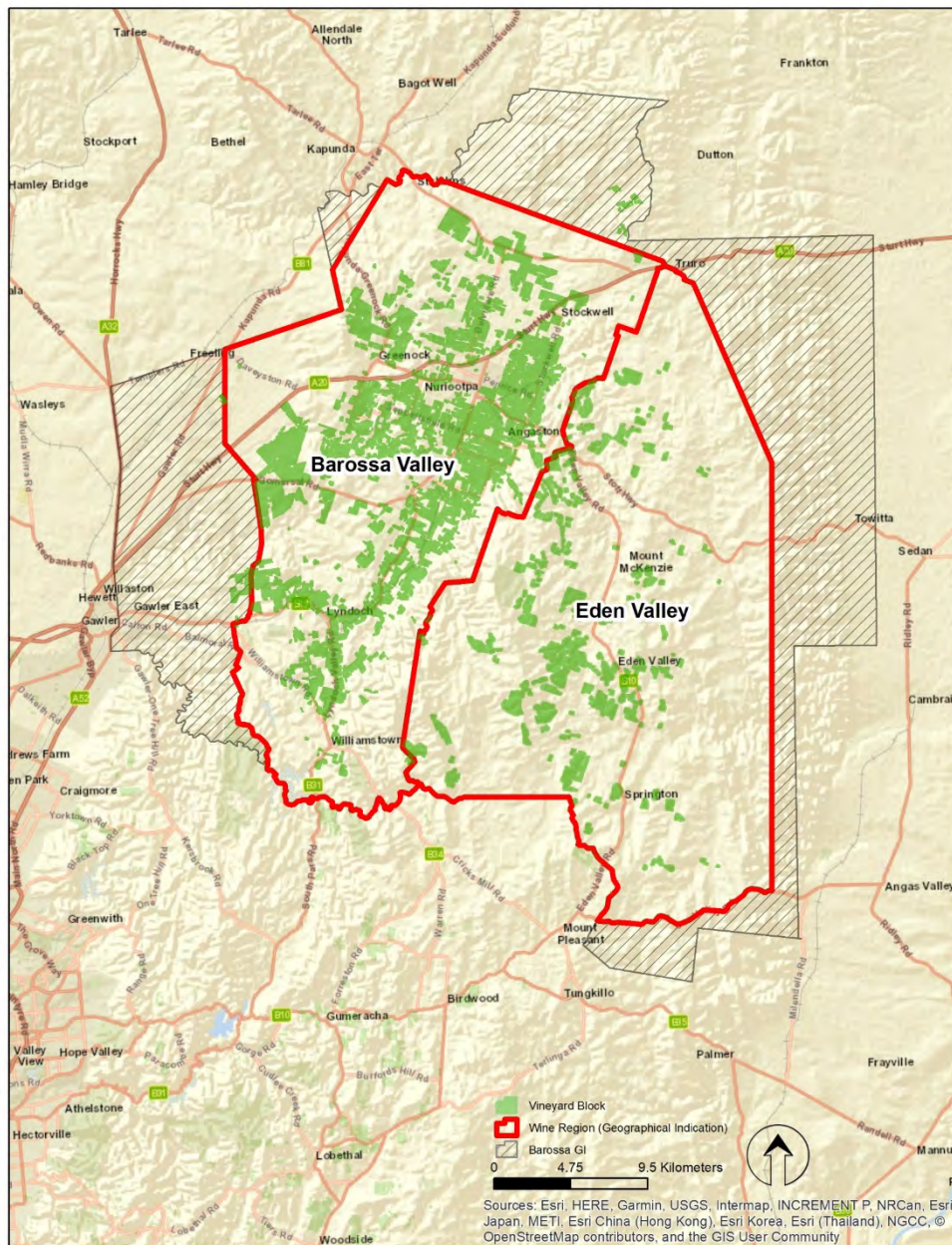


# SA Winegrape Crush Survey 2019

## Regional Summary Report

### Barossa Including Barossa Valley and Eden Valley

*Wine Australia July 2019*



Barossa

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



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# Barossa

## Vintage overview – Barossa Valley

### VINTAGE REPORT – BAROSSA VALLEY

Barossa's 2019 wines will be sought out early, following the lowest-yielding – but possibly the highest quality – vintage of the past decade.

After a very dry winter and spring (winter rainfall 77 per cent and spring 64 per cent of average in Barossa Valley), frost events on 29 September and 8 November disrupted budburst and flowering. The region experienced windy conditions during flowering, and sporadic hail storms in November hit some vineyards. This was followed by hot, very dry conditions in January and February (summer rain 31 per cent of average; March 12 per cent of average). December and January experienced above average max temps by 2.6° and 3.2°C respectively, with 11 days over 35°C in Jan but close to average temperatures in February.

The lack of rainfall means Barossa's vineyards have not experienced any disease pressure this season.

On most soil types, vineyards irrigated in winter have retained better soil moisture and healthier crops than those irrigated later in the season. Vineyards that have been 'reworked' to convert older cordons with spurs to cane pruning - largely to manage Eutypa – have also fared better.

Data from Barossa Grape & Wine Association's (BGWA) 'demonstration vineyards' project shows vineyards with mulch under-vine and mid-row swards are retaining cooler soil temperatures, less evaporation, more consistent ripening of fruit, and higher bunch weights, compared with vines grown in bare soil.

The lower yields will result in Barossa Shiraz and Cabernet Sauvignon with great colour, intense flavours and firm tannin structure, while Grenache and Mataro have been described as "exceptional" and are shaping up to be 2019 vintage standouts.

*Nicki Robins, Barossa Grape & Wine Association*

### OVERVIEW OF VINTAGE STATISTICS

The 2019 Barossa Valley recorded crush<sup>1</sup> was 40,986, down 28 per cent from the 2018 crush of 57,513 tonnes.

There were 78 respondents to the survey who reported crushing grapes from the Barossa Valley in 2019, compared with 72 in 2018.

Over the last 5 years (2014-2018), the average Barossa Valley reported production has been 54,711 tonnes, with a low of 44,336 tonnes in 2014 and a high of 73,174 tonnes in 2017. The 2019 crush was 25 per cent below the five year average and the lowest since 2007.

The total value of grapes from the region is estimated to be \$84 million in 2019, compared with \$113 million in 2018, with the lower tonnage partially offset by a small increase in the overall average purchase value.

After small declines in average value in 2018, Shiraz and Cabernet Sauvignon each increased by 2 per cent in 2019, while Grenache increased by 9 per cent to \$1873 per tonne.

The price dispersion data shows that, while the proportion of red varieties purchased at \$1500 per tonne or more increased from 91 per cent in 2018 to 94 per cent, while the proportion purchased at \$2000 or more increased slightly to 54 per cent.

There were 129 hectares of new plantings in the Barossa Valley in the 2018 planting season (including top-working and replacements) compared with 197 hectares in the previous year. Shiraz accounted for the majority of the new plantings (88 hectares).

The total area of vineyards in the Barossa Valley as at 30 April 2019 was 11,702 hectares (including 238 hectares in Barossa zone – other). In 2013 the total area was 11,394 hectares.

<sup>1</sup> Report includes crush from Barossa Zone – other (818 tonnes)

# Barossa

## Winegrape intake summary table – Barossa Valley (red winegrapes)

	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+							
<b>Red</b>													
Barbera	2				2						0%	2	\$2,916
Cabernet Franc	54			36	17		\$70,076	\$1,306	13%	25	31%	78	\$102,117
Cabernet Sauvignon	3,649			39	2,303	1,302	\$7,478,493	\$2,049	2%	2,640	42%	6,289	\$12,889,185
Durif	80			13	53	14	\$138,770	\$1,735	9%	9	10%	89	\$153,920
Grenache	1,490			169	896	426	\$2,791,592	\$1,873	9%	270	15%	1,761	\$3,297,914
Malbec	40				34	6	\$74,520	\$1,840	5%	75	65%	116	\$213,217
Mataro/Mourvedre	510			26	289	196	\$990,403	\$1,940	2%	379	43%	889	\$1,725,324
Merlot	860			665	195		\$969,362	\$1,128	-1%	129	13%	989	\$1,115,354
Montepulciano	25			3	11	10	\$45,642	\$1,858	-9%	33	57%	57	\$106,672
Muscat Rouge a Petits Grain:	6			6						11	64%	17	\$17,272
Nero d'Avola	22				22		\$38,132	\$1,741	19%	12	34%	33	\$58,207
Petit Verdot	46			20	21	5	\$61,780	\$1,352	-1%	15	24%	61	\$81,812
Pinot Meunier	5			5							0%	5	\$6,786
Pinot Noir	122			122			\$97,902	\$805	-1%		0%	122	\$97,902
Sangiovese	227			206	8	13	\$318,231	\$1,402	1%	40	15%	267	\$373,909
Shiraz	14,893			4	4,747	10,138	\$34,479,136	\$2,315	2%	10,826	42%	25,718	\$59,542,856
Tempranillo	377			8	348	21	\$686,346	\$1,819	8%	88	19%	465	\$846,543
Other red	159			66	62	31	\$254,871	\$1,598	14%	84	35%	244	\$389,510
<b>Red Total</b>	<b>22,567</b>			<b>1,389</b>	<b>9,009</b>	<b>12,161</b>	<b>\$48,511,181</b>	<b>\$2,150</b>	<b>3%</b>	<b>14,636</b>	<b>39%</b>	<b>37,203</b>	<b>\$81,021,416</b>

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

# Barossa

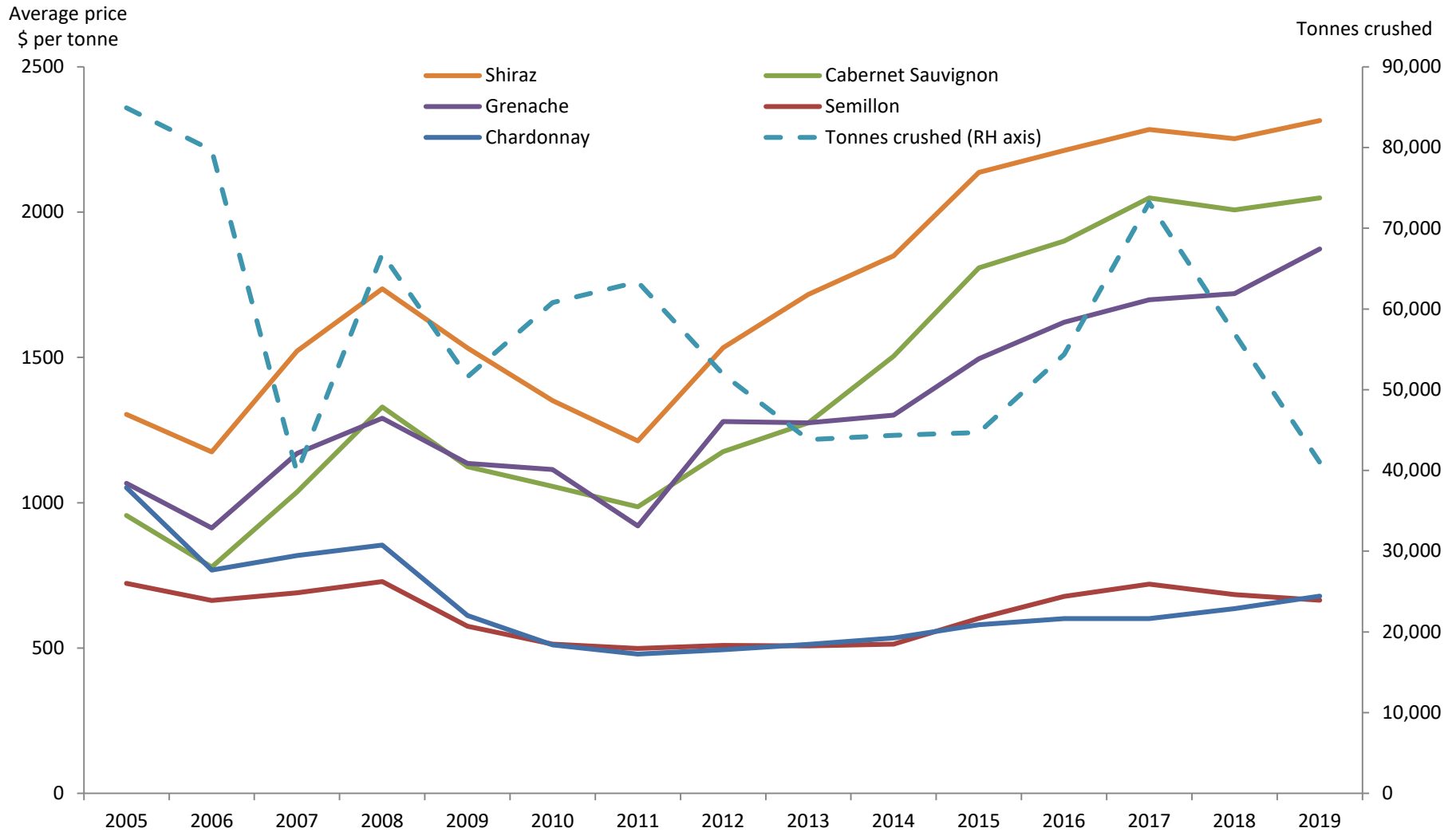
## Winegrape intake summary table – Barossa Valley (white winegrapes)

	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+							
<b>White</b>													
Chardonnay	962		26	936			\$653,620	\$679	7%	282	23%	1,244	\$845,076
Chenin blanc	10			6	5				-100%		0%	10	\$11,659
Fiano										20	100%	20	\$31,089
Gewurztraminer	55			55							0%	55	\$41,385
Marsanne	17			5	8	4	\$27,286	\$1,598	28%	23	58%	40	\$64,660
Muscadelle (Tokay)	12			12					-100%		0%	12	\$13,288
Muscat Blanc a Petits Grains	129			129			\$121,150	\$941	11%	42	25%	171	\$160,664
Pinot Gris/Grigio	74			74					-100%	55	43%	129	\$135,117
Riesling	428			428			\$365,770	\$854	-2%	42	9%	471	\$402,049
Roussanne	12				12				-100%	1	6%	13	\$20,912
Sauvignon Blanc	319		15	304			\$273,736	\$857	2%	21	6%	340	\$291,400
Semillon	700		230	464	5	2	\$465,770	\$665	-3%	170	20%	871	\$579,121
Vermentino	50			50					-100%	4	8%	54	\$49,614
Viognier	209			199	5	4	\$279,266	\$1,338	3%	34	14%	243	\$324,771
Other white	28			16	1	11	\$39,952	\$1,420	23%	81	74%	109	\$154,796
<b>White Total</b>	<b>3,007</b>		<b>271</b>	<b>2,678</b>	<b>37</b>	<b>21</b>	<b>\$2,435,283</b>	<b>\$810</b>	<b>4%</b>	<b>777</b>	<b>21%</b>	<b>3,784</b>	<b>\$3,125,602</b>
<b>Grand Total</b>	<b>25,574</b>		<b>271</b>	<b>4,067</b>	<b>9,045</b>	<b>12,182</b>	<b>\$50,946,464</b>	<b>\$1,992</b>	<b>3%</b>	<b>15,412</b>	<b>38%</b>	<b>40,986</b>	<b>\$84,147,017</b>

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

# Barossa

## Historical weighted average price vs tonnes crushed – Barossa Valley



# Barossa

## Vintage overview – Eden Valley

### VINTAGE REPORT – EDEN VALLEY

Similar to the Barossa Valley, vintage 2019 in Eden Valley was not without its challenges. Wines produced are of outstanding quality but from lower than average yields.

Rainfall throughout winter totalled 166 mm - just 62 per cent of the long-term average. The dry conditions continued into early spring with September and October being 22 per cent drier than average. Some welcome rain fell on 22 November which pushed the spring rainfall total up to 127 mm but was scarce following this with a total of 36 mm falling during the summer period (44 per cent of the average). Autumn had not provided any major relief up until May with a mere 9.6 mm recorded.

Days and nights were cooler than average in September, delaying budburst in most varieties. However, October days were warmer than average which accelerated vine growth. Vines started utilising soil moisture throughout November as a result of the drier soil profiles and consequently vine growth slowed as flowering approached. A hailstorm, as part of the 22 November rain event, caused shoot damage and adversely affected the number of bunches that would go on to fruit set, particularly in Chardonnay and Riesling, contributing to the lower yields.

Maximum daily temperatures exceeded the average during summer, putting pressure on irrigation systems to ensure adequate leaf health moving into veraison. There were 10 days in January that exceeded 35 °C, while 24 January 2019 was the hottest day on record at 43.7°C. Water allocations became a concern throughout summer with many dams coming close to dry and irrigation prioritised onto individual blocks.

Warmer than average nights during December and January hastened the ripening period. Thankfully, night-time temperatures throughout February were slightly cooler than average, providing perfect conditions for berry ripening and acid retention. Harvest of white varieties in Eden Valley began in late February through to late March.

Due to the seasonal challenges, growers experienced significantly lower than average yields. However, an absence of disease in a dry season and small berries allowed for concentrated flavour and sound fruit quality.

Despite the challenges, the wines that were made are of high quality. Whites have delicate flavours and surprisingly high balanced natural acids. Reds have strong colours and show the perfume we expect from this region.

*Louisa Rose, Yalumba*

### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Eden Valley in 2019 was 5,477 tonnes, 53 per cent below last year's vintage of 11,652 tonnes.

The five-year average crush for Eden Valley from 2014-2018 is 9,935 tonnes, making the 2019 harvest 45 per cent below the average and the lowest ever recorded (since 1996).

The estimated value of fruit from the region in 2019 was just over \$10 million, roughly half that of last year, reflecting the lower tonnage and a small decrease in the region's overall average grape value. The region's largest variety, Riesling, increased by 2 per cent to \$1645 per tonne and Shiraz increased by 4 per cent to \$2,755 per tonne.

There were 66 hectares of new plantings in Eden Valley in the 2018 planting season, with 45 being Shiraz. This reflects a 3 per cent new planting rate, higher than in most regions. However, despite the new plantings, the total planted area as at 30 April 2019 declined slightly to 2,333 hectares, compared with 2,335 hectares in 2018, reflecting net removals of older vines.

# Barossa

## Winegrape intake summary table – Eden Valley

	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+							
<b>Red</b>													
Barbera										1	100%	1	\$980
Cabernet Franc	17					17				5	21%	21	\$50,317
Cabernet Sauvignon	270			1	66	203	\$677,362	\$2,505	6%	263	49%	533	\$1,335,378
Grenache	11				5	7	\$28,718	\$2,509	-8%	3	23%	15	\$37,159
Mataro/Mourvedre	5					5				12	71%	17	\$37,795
Merlot	131			46	85		\$174,998	\$1,334	6%	52	28%	183	\$244,591
Montepulciano										5	100%	5	\$8,661
Nero d'Avola	3				3						0%	3	\$5,281
Petit Verdot										27	100%	27	\$32,700
Pinot Meunier										19	100%	19	\$29,057
Pinot Noir	88			77	6	5	\$108,876	\$1,244	5%	37	30%	125	\$155,166
Shiraz	634			1	102	531	\$1,746,301	\$2,755	4%	476	43%	1,110	\$3,057,634
Tempranillo	14				14				-100%	8	36%	22	\$41,289
Other red	6			2		4				6	52%	12	\$23,903
<b>Red Total</b>	<b>1,179</b>			<b>126</b>	<b>281</b>	<b>771</b>	<b>\$2,829,981</b>	<b>\$2,401</b>	<b>1%</b>	<b>914</b>	<b>44%</b>	<b>2,093</b>	<b>\$5,059,909</b>
<b>White</b>													
Chardonnay	329			238	87	4	\$468,863	\$1,426	15%	397	55%	726	\$1,035,025
Gewurztraminer	24			24						12	35%	36	\$41,440
Gruener Veltliner										2	100%	2	\$3,590
Muscat Blanc a Petits Grains	15			13	2				-100%	1	5%	16	\$14,398
Pinot Gris/Grigio	51			44	7		\$68,436	\$1,350	4%	92	64%	142	\$192,203
Riesling	852			367	328	157	\$1,401,982	\$1,645	2%	1,188	58%	2,040	\$3,356,128
Roussanne	17			17						8	32%	25	\$33,629
Sauvignon Blanc	59			59			\$57,544	\$979	8%	69	54%	128	\$124,975
Semillon	62		5	57			\$43,802	\$711	-3%	10	14%	72	\$51,192
Viognier	74				62	12	\$145,857	\$1,969	25%	64	46%	138	\$271,805
Other white	12			12						48	79%	60	\$81,122
<b>White Total</b>	<b>1,494</b>		<b>5</b>	<b>831</b>	<b>486</b>	<b>173</b>	<b>\$2,266,918</b>	<b>\$1,518</b>	<b>9%</b>	<b>1,890</b>	<b>56%</b>	<b>3,384</b>	<b>\$5,205,505</b>
<b>Grand Total</b>	<b>2,672</b>		<b>5</b>	<b>957</b>	<b>766</b>	<b>944</b>	<b>\$5,096,899</b>	<b>\$1,907</b>	<b>-1%</b>	<b>2,804</b>	<b>51%</b>	<b>5,477</b>	<b>\$10,265,414</b>

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



# Barossa

## Current plantings by variety and year planted – Barossa Valley (red winegrapes)

*Includes Barossa Zone other (238 hectares)*

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>Red winegrapes</b>						
Cabernet Franc	29	0	2	0	30	0%
Cabernet Sauvignon	1,537	38	37	29	1,641	2%
Durif (Petite Sirah)	19	0	0	0	19	2%
Grenache	617	5	3	5	630	1%
Malbec	24	1	4	2	30	5%
Mataro (Mourvedre)	257	10	11	2	280	1%
Merlot	302	1	2	0	305	0%
Petit Verdot	19	0	0	0	19	0%
Pinot Noir	36	0	0	0	36	0%
Sangiovese	27	0	0	0	27	0%
Shiraz	7,024	143	133	88	7,388	1%
Tempranillo	99	1	0	0	100	0%
Zinfandel	11	0	0	0	12	0%
Other Red	101	3	5	1	110	1%
<b>TOTAL RED WINEGRAPES</b>	<b>10,102</b>	<b>202</b>	<b>197</b>	<b>127</b>	<b>10,627</b>	<b>1%</b>

*Source:  
Vinehealth  
Australia*

# Barossa

## Current plantings by variety and year planted – Barossa Valley (white winegrapes)

*Includes Barossa Zone other (238 hectares)*

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>White winegrapes</b>						
Chardonnay	290	1	0	0	291	0%
Chenin Blanc	11	0	0	0	11	0%
Marsanne	8	0	0	1	9	6%
Muscadelle (Tokay)	12	0	0	0	12	0%
Muscat a Petits Grains Blanc (White Frontignac)	47	0	0	0	47	0%
Pedro Ximenez	4	0	0	0	4	0%
Pinot Gris/Grigio	16	0	0	0	16	0%
Riesling	149	0	0	0	149	0%
Sauvignon Blanc	50	0	0	0	50	0%
Semillon	301	0	0	0	301	0%
Vermentino	7	0	0	0	8	6%
Viognier	52	0	0	0	52	0%
Other White	45	0	0	1	46	2%
<b>TOTAL WHITE WINEGRAPES</b>	<b>992</b>	<b>1</b>	<b>0</b>	<b>2</b>	<b>996</b>	<b>0%</b>
Unknown variety	79	0	0	0	79	0%
<b>TOTAL ALL VARIETIES</b>	<b>11,173</b>	<b>203</b>	<b>197</b>	<b>129</b>	<b>11,702</b>	<b>1%</b>

Source:  
Vinehealth  
Australia

# Barossa

## Current plantings by variety and year planted – Eden Valley

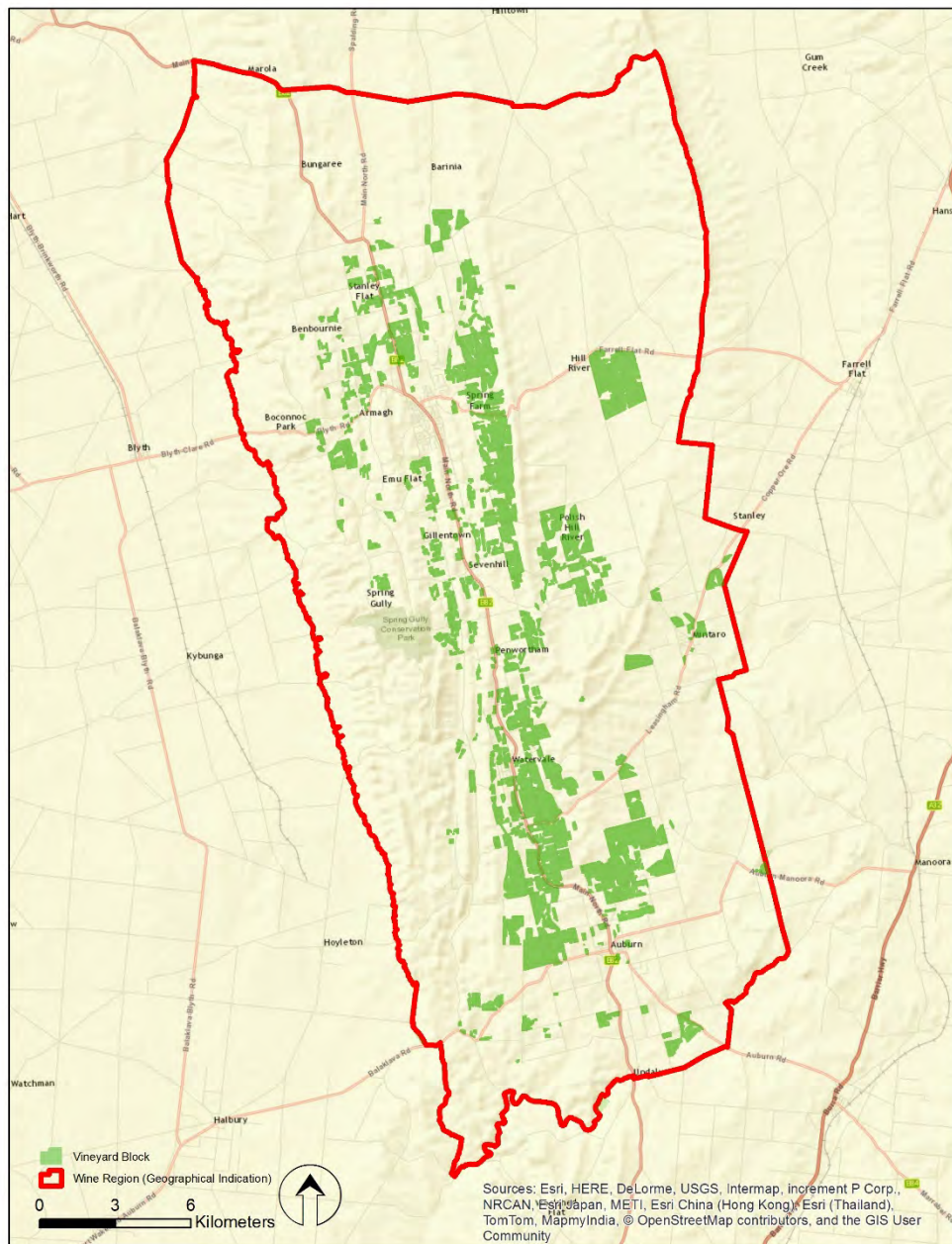
Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>Red winegrapes</b>						
Cabernet Franc	5	1	0	0	6	0%
Cabernet Sauvignon	318	14	7	16	356	5%
Grenache	20	0	0	0	20	0%
Mataro (Mourvedre)	16	0	0	0	16	0%
Merlot	56	1	0	0	57	0%
Petit Verdot	7	0	0	0	7	0%
Pinot Noir	51	0	3	0	53	0%
Shiraz	720	38	14	45	816	5%
Tempranillo	12	0	0	0	12	0%
Other Red	13	2	3	0	18	0%
<b>TOTAL RED WINEGRAPES</b>	<b>1218</b>	<b>56</b>	<b>27</b>	<b>61</b>	<b>1361</b>	<b>4%</b>
<b>White winegrapes</b>						
Chardonnay	244	0	0	0	244	0%
Muscat a Petits Grains Blanc (White Frontignac)	7	0	0	0	7	0%
Pinot Gris/Grigio	40	0	0	0	40	0%
Riesling	527	0	0	5	532	1%
Sauvignon Blanc	42	0	0	0	42	0%
Semillon	17	0	0	0	17	0%
Traminer (Gewurztraminer)	17	0	0	0	17	0%
Viognier	33	0	0	0	33	0%
Other White	20	0	0	0	21	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>947</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>953</b>	<b>1%</b>
Unknown variety	19	0	0	0	19	0%
<b>TOTAL ALL VARIETIES</b>	<b>2184</b>	<b>56</b>	<b>27</b>	<b>66</b>	<b>2333</b>	<b>3%</b>

Source:  
Vinehealth  
Australia

# Regional Summary Report

# Clare Valley Wine Region

# Wine Australia July 2019



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

## Clare Valley Wine Region



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# Clare Valley

## Vintage overview

### VINTAGE REPORT

Clare Valley vineyards have shown resilience through drought conditions with Vintage 2019 producing lower yields of high quality fruit.

Lower winter and spring rainfall produced smaller canopies and berries in many vineyards which have enhanced quality across Shiraz, Riesling and the later-ripening Cabernet Sauvignon. These three varieties account for more than 80 per cent of the Clare Valley's winegrape production.

The season kicked off with some localised frost events in September and October, which led to yield losses in several vineyards across the region. Localised hail also caused some losses in Stanley Flat and Hill River and further south in a narrow band through Watervale and Leasingham.

Local estimates are that yield reductions in the region were limited to 30-40 per cent in healthy vineyards with well-managed irrigation systems. However, some dry-grown vineyard blocks had greater yield reductions.

There were some extreme weather conditions during the growing season, including the lowest temperature recorded in spring and the highest ever temperature in summer, but the grapes showed great resilience. Whites have retained good acidity while the reds were sun-blessed and are showing great colour and varietal intensity.

Riesling has been the star performer in terms of yield, with crops coming in at only 10-15 per cent down on expectations, demonstrating what an incredibly resilient variety Riesling is under our conditions.

Low yields prompted a brief harvest. Good yields and quality have been reported in red varieties such as Sangiovese, Grenache, Merlot and Mourvedre, with some outstanding colours showing early. Shiraz and Cabernet yields were more affected, but quality is looking strong.

*Tania Matz, Clare Valley Wine & Grape Association*

### OVERVIEW OF VINTAGE STATISTICS

A total of 15,573 tonnes of Clare Valley winegrapes was crushed in 2019, down 33 per cent on the 2018 crush of 23,198. Over the past five years (up to 2018), the average crush for Clare has been 21,509 tonnes, making this year's crush 28 per cent below the five-year average and the lowest since 2000.

There were 40 respondents to the survey who reported crushing grapes from Clare Valley in 2019, compared with 36 in 2018.

The total value of winegrapes in 2018 decreased by \$5 million to \$22 million as a result of the lower production, although this was partly offset by an overall increase of 19 per cent in the average purchase value of grapes.

There were increases in average prices for all the major varieties. The average for Shiraz increased by 27 per cent to a record \$1832 per tonne and Cabernet Sauvignon increased by 39 per cent to \$1510 per tonne (the highest since 2003). The region's largest variety, Riesling, increased by 9 per cent to \$1151 per tonne while Chardonnay increased by 30 per cent to \$918 per tonne (both the highest since 2008).

The price dispersion data shows that 51 per cent of red grapes were sold at above \$1500 per tonne, compared with 13 per cent in 2018. For whites, 94 per cent of the purchased fruit was purchased at between \$600 and \$1500 per tonne – a relatively narrow dispersion range.

There were 32 hectares of new vines planted in the region in the 2018 season. Almost all the new plantings were red varieties with Shiraz the largest (18 hectares).

The total vineyard area in Clare as at 30 April 2019 is 5,016 hectares – a small net reduction since 2018 (5,060 hectares) and 350 hectares below the total area five years ago.

# Clare Valley

## Winegrape intake summary table

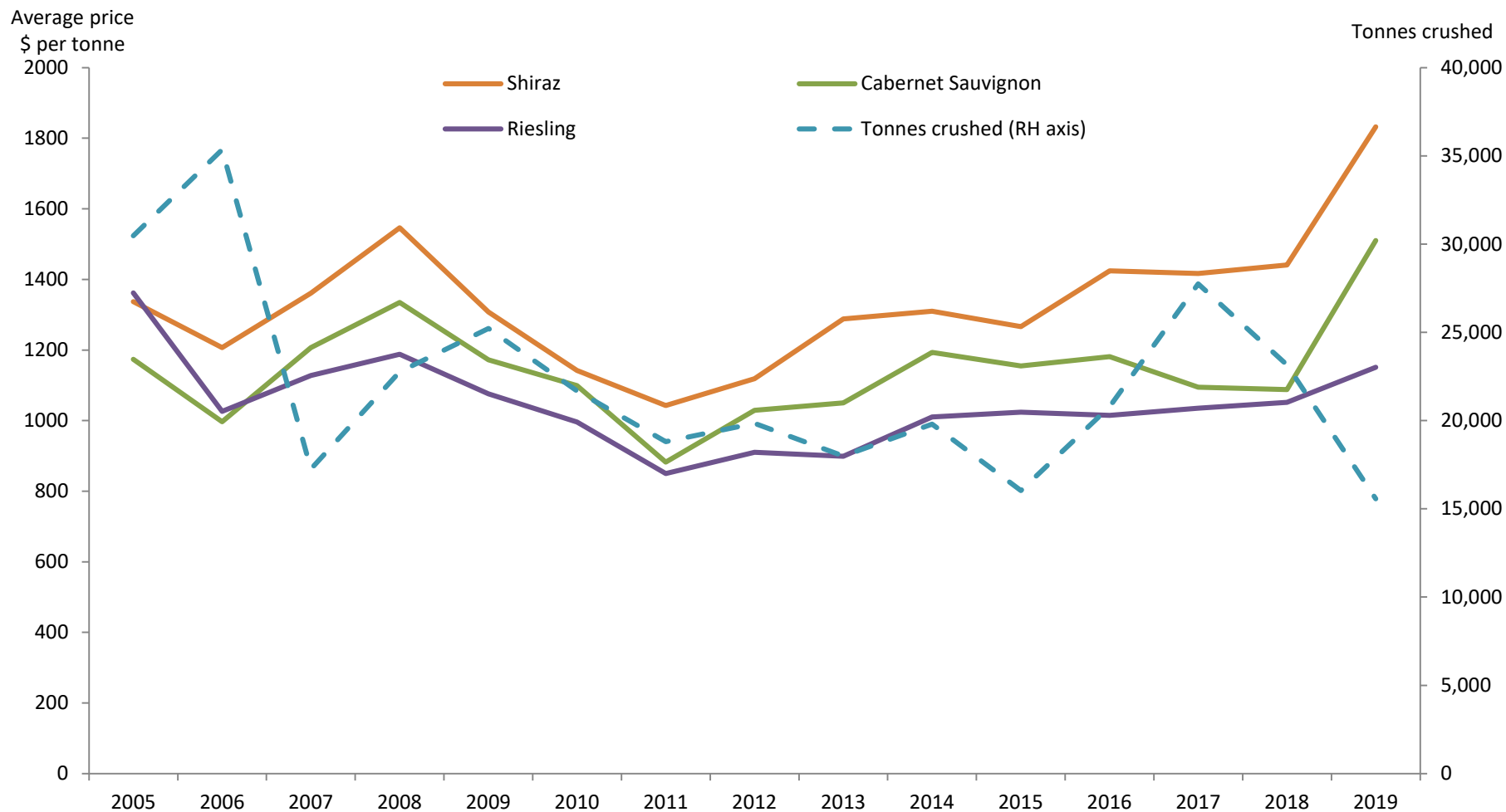
	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
<b>Red</b>													
Barbera										6	100%	6	\$8,908
Cabernet Franc										28	100%	28	\$40,333
Cabernet Sauvignon	996			481	430	84	\$1,504,377	\$1,510	39%	1,400	58%	2,396	\$3,618,364
Grenache	40			22	13	4	\$59,999	\$1,505	12%	107	73%	147	\$221,255
Malbec	121		3	42	76		\$176,840	\$1,465	14%	126	51%	247	\$361,493
Mataro/Mourvedre	97			51	43	4	\$154,812	\$1,596	20%	26	21%	123	\$197,070
Merlot	408			408			\$407,583	\$999	15%	596	59%	1,004	\$1,003,098
Montepulciano	5					5				3	39%	8	\$17,991
Muscat Rouge a Petits Grain:										1	100%	1	\$1,202
Petit Verdot	23				23					8	26%	31	\$46,560
Pinot Noir										30	100%	30	\$51,523
Ruby Cabernet										4	100%	4	\$2,225
Sangiovese	46			46			\$48,545	\$1,050	1%	45	49%	91	\$95,635
Shiraz	2,149			817	621	711	\$3,936,750	\$1,832	27%	2,254	51%	4,404	\$8,065,953
Tempranillo	75			66	9		\$88,341	\$1,181	2%	75	50%	149	\$176,376
Shiraz	1				1					33	96%	34	\$55,968
<b>Red Total</b>	<b>3,962</b>		<b>3</b>	<b>1,934</b>	<b>1,217</b>	<b>809</b>	<b>\$6,424,970</b>	<b>\$1,622</b>	<b>28%</b>	<b>4,743</b>	<b>54%</b>	<b>8,704</b>	<b>\$13,963,952</b>
<b>White</b>													
Chardonnay	230			230			\$211,031	\$918	30%	244	52%	474	\$435,333
Fiano	3			3						23	90%	25	\$20,392
Gewurztraminer	29			29						26	47%	55	\$38,626
Muscadelle (Tokay)										3	100%	3	\$3,273
Pinot Gris/Grigio	116			116			\$140,299	\$1,209	-2%	256	69%	372	\$449,575
Riesling	3,268			3,109	139	19	\$3,762,059	\$1,151	9%	2,322	42%	5,589	\$6,435,184
Sauvignon Blanc										32	100%	32	\$33,403
Semillon	157		56	101			\$100,290	\$640	5%	36	19%	193	\$123,400
Verdelho										5	100%	5	\$4,843
Viognier	1				1					50	98%	50	\$75,539
Other white										70	100%	70	\$103,463
<b>White Total</b>	<b>3,803</b>		<b>56</b>	<b>3,588</b>	<b>140</b>	<b>19</b>	<b>\$4,237,518</b>	<b>\$1,114</b>	<b>13%</b>	<b>3,066</b>	<b>45%</b>	<b>6,869</b>	<b>\$7,723,029</b>
<b>Grand Total</b>	<b>7,765</b>		<b>58</b>	<b>5,522</b>	<b>1,356</b>	<b>828</b>	<b>\$10,662,488</b>	<b>\$1,373</b>	<b>19%</b>	<b>7,809</b>	<b>50%</b>	<b>15,573</b>	<b>\$21,686,981</b>

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

Variety	Year planted				Total area (ha)	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Franc	15	0	0	0	15	0%
Cabernet Sauvignon	1,096	1	9	9	1115	1%
Grenache	62	4	0	0	66	0%
Malbec	79	2	3	1	85	1%
Mataro (Mourvedre)	32	1	1	0	34	0%
Merlot	264	0	0	0	264	0%
Sangiovese	25	0	0	0	25	0%
Shiraz	1,829	13	17	18	1877	1%
Tempranillo	33	4	0	0	37	0%
Other Red	36	1	2	3	42	7%
RED WINEGRAPES	3,471	26	32	31	3,560	1%
White winegrapes						
Chardonnay	147	0	0	0	147	0%
Pinot Gris	53	2	0	0	55	0%
Riesling	991	48	12	0	1051	0%
Sauvignon Blanc	14	0	0	0	14	0%
Semillon	106	0	0	0	106	0%
Traminer (Gewurztraminer)	15	0	0	0	15	0%
Viognier	11	0	0	0	11	0%
Other White	37	1	2	1	41	3%
WHITE WINEGRAPES	1,374	51	14	1	1,440	0%
Unknown variety	15	0	0	0	15	0%
Rootstock Block	1	0	0	0	1	0%
TOTAL ALL VARIETIES	4,861	77	46	32	5,016	1%

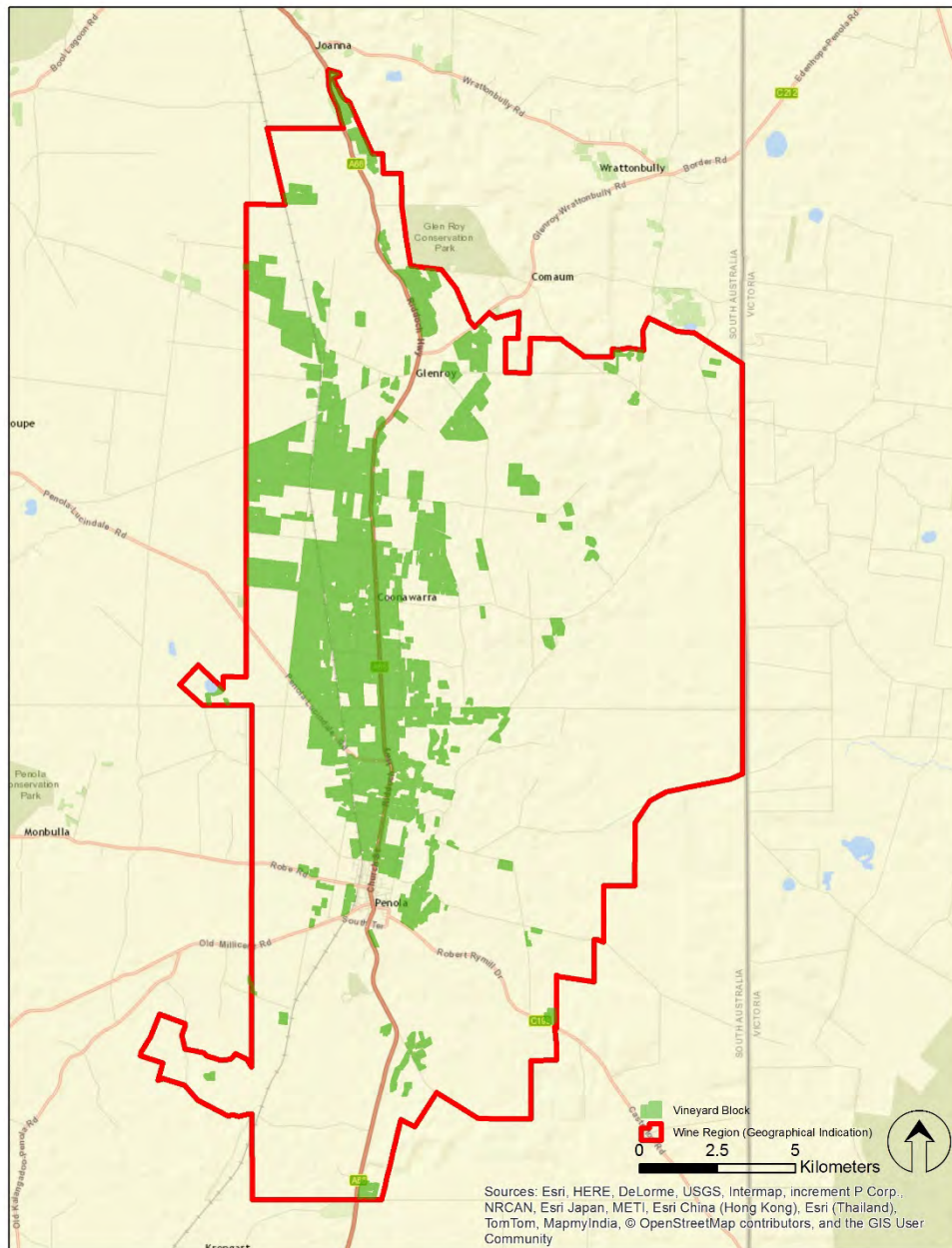
Source:  
Vinehealth  
Australia

# SA Winegrape Crush Survey 2019

## Regional Summary Report

### Coonawarra Wine Region

*Wine Australia July 2019*



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

**Coonawarra  
Wine Region**



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# Coonawarra

## Vintage overview

### VINTAGE REPORT

All in all, Vintage 2019 for Coonawarra has been excellent.

Coonawarra received good winter rains leading into the growing season. This growing season has highlighted the importance of our good quality and quantity of underground water used to mitigate temperature and seasonal weather conditions. There has been no significant crop loss due to heat, and canopies remained in excellent condition through to the end of harvest; significantly benefiting from the typically cool nights created by the Southern Ocean.

Vintage timing was in line with the long-term average. Vintage 2019 commenced in Coonawarra in the last week of February with white wine varieties Sauvignon Blanc, Chardonnay and Riesling being picked through to late March. The whites are showing great natural acidity and complex flavours, Riesling and Chardonnay being the stand outs. Red wine varieties were harvested through April, with a small carry over into May.

A cool and dry April was perfect for ripening, allowing full flavour development and optimal sugar levels. Yields of red wine grapes were between average to slightly below the long-term average.

Shiraz and Cabernet Sauvignon are both highly rated by Coonawarra winemakers. Shiraz is showing bright fruits with high colour intensity. Cabernet is deep and rich in colour with great varietal definition and soft ripe tannins.

*Coonawarra Vignerons Board (Coonawarra Grape and Wine Incorporated), May 2019*

### OVERVIEW OF VINTAGE STATISTICS

A total of 37,242 tonnes of Coonawarra winegrapes was reported to be crushed in 2019 – 25 per cent more than in 2018 and also above the 36,509 tonnes crushed in 2017.

There were 41 respondents to the survey who reported crushing grapes from Coonawarra in 2019 compared with 30 in 2018.

Over the past five years (2014-2018), the average crush of Coonawarra winegrapes has been 30,463 tonnes, making the 2019 crush 22 per cent above the average and the largest since 2008.

As a result of the higher tonnage, the total estimated value of winegrapes increased from \$45 million to \$54 million. There was a 7 per cent overall reduction in the average value of grapes, with Cabernet Sauvignon, which accounted for nearly 50 per cent of Coonawarra's crush, down by 2 per cent to \$1721 per tonne after a dramatic jump in 2018. Shiraz increased by 3 per cent to \$1458 per tonne and Chardonnay increased by 10 per cent to \$782 per tonne.

The price dispersion data shows that 57 per cent of red grapes were purchased at \$1500 or above, and 90 per cent of white grapes were purchased at between \$600 and \$1500 per tonne.

There were 21 hectares of new vines planted in Coonawarra in the 2018 growing season, after 9 hectares the previous year. Half were Cabernet Sauvignon and almost all were red varieties. The total area planted in Coonawarra declined by 92 hectares to 5726 hectares. This is very similar to what it was five years ago (5686 hectares in 2013).

# Coonawarra

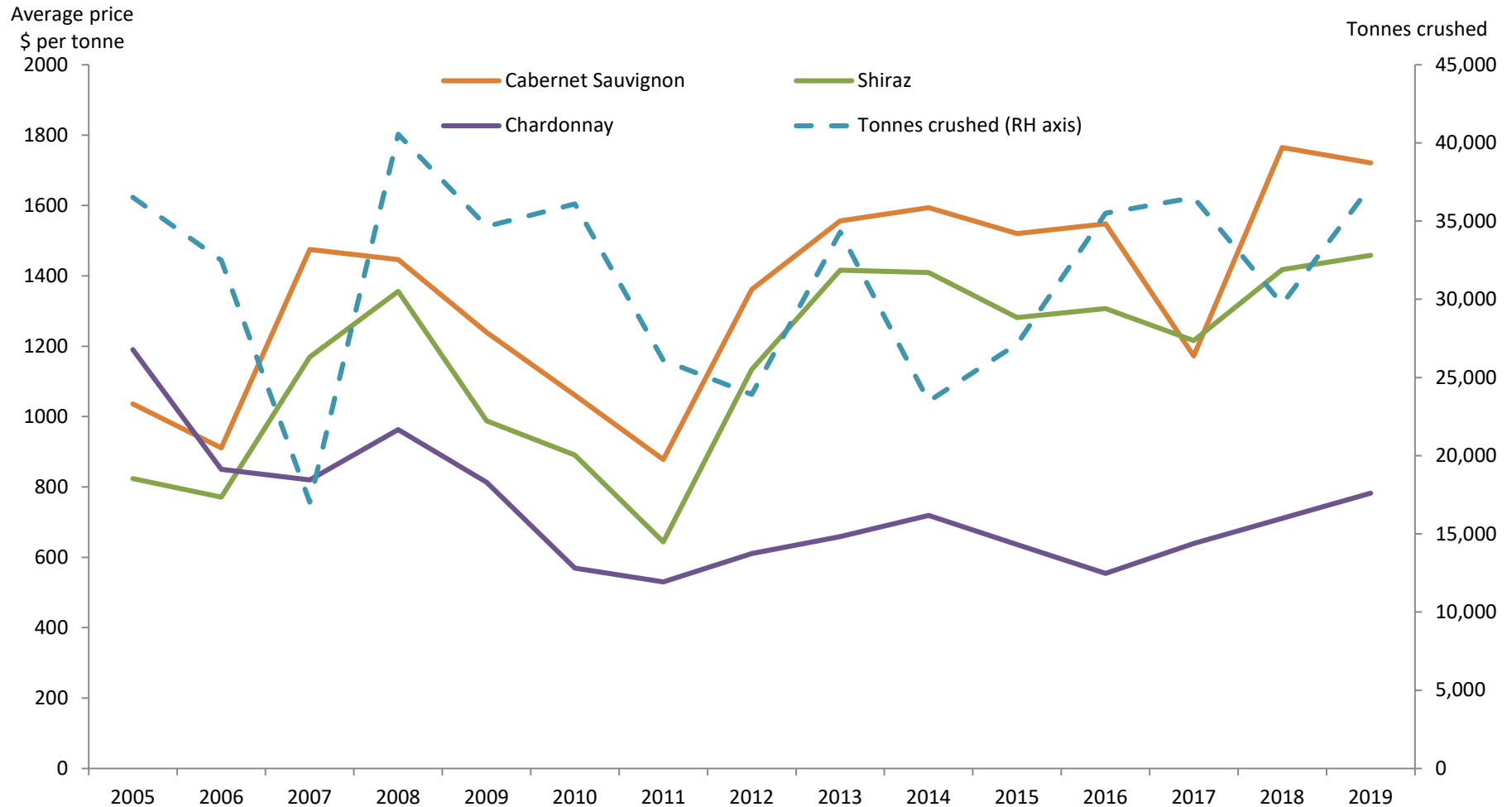
## Winegrape intake summary table

	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+							
<b>Red</b>													
Barbera	8					8					0%	8	\$16,140
Cabernet Franc	8			8						97	93%	105	\$130,663
Cabernet Sauvignon	5,939			1,876	2,915	1,147	\$10,223,106	\$1,721	-2%	12,149	67%	18,088	\$31,134,843
Malbec	17				17					100	85%	117	\$230,987
Merlot	915			892	14	10	\$943,588	\$1,031	7%	2,374	72%	3,289	\$3,392,790
Petit Verdot	33		22	11						189	85%	222	\$118,026
Pinot Meunier										19	100%	19	\$28,980
Pinot Noir	82		15	67			\$77,792	\$948		224	73%	306	\$290,038
Shiraz	2,431			1,197	1,057	177	\$3,545,235	\$1,458	3%	7,847	76%	10,278	\$14,988,196
Tempranillo										2	100%	2	\$2,710
Other red	22			12	10					0	2%	22	\$29,171
<b>Red Total</b>	<b>9,455</b>		<b>37</b>	<b>4,062</b>	<b>4,013</b>	<b>1,342</b>	<b>\$14,895,426</b>	<b>\$1,575</b>	<b>-6%</b>	<b>23,001</b>	<b>71%</b>	<b>32,455</b>	<b>\$50,362,543</b>
<b>White</b>													
Chardonnay	864			864			\$675,906	\$782	10%	1,789	67%	2,654	\$2,075,004
Gewurztraminer										20	100%	20	\$16,562
Pinot Gris/Grigio										50	100%	50	\$59,262
Riesling	19			19						577	97%	596	\$506,360
Sauvignon Blanc	260		70	190			\$188,295	\$723	-13%	915	78%	1,175	\$849,840
Semillon	51		51							225	82%	276	\$152,020
Viognier										5	100%	5	\$7,030
Other white										10	100%	10	\$14,732
<b>White Total</b>	<b>1,194</b>		<b>122</b>	<b>1,073</b>			<b>\$908,055</b>	<b>\$760</b>	<b>-2%</b>	<b>3,592</b>	<b>75%</b>	<b>4,787</b>	<b>\$3,680,811</b>
<b>Grand Total</b>	<b>10,649</b>		<b>159</b>	<b>5,135</b>	<b>4,013</b>	<b>1,342</b>	<b>\$15,803,481</b>	<b>\$1,484</b>	<b>-7%</b>	<b>26,593</b>	<b>71%</b>	<b>37,242</b>	<b>\$54,043,354</b>

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

# Coonawarra

## Historical weighted average price vs tonnes crushed





# Coonawarra

## Current plantings by variety and year planted

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Franc	20	1	1	0	22	0%
Cabernet Sauvignon	3567	3	14	10	3594	0%
Malbec	18	0	0	0	18	0%
Merlot	354	1	0	0	355	0%
Petit Verdot	17	0	0	0	17	0%
Pinot Noir	41	0	0	0	41	0%
Shiraz	1208	0	0	6	1214	0%
Other Red	7	0	3	2	12	15%
TOTAL RED WINEGRAPES	5232	5	18	18	5273	0%
White winegrapes						
Chardonnay	267	0	0	3	270	1%
Riesling	72	0	0	0	72	0%
Sauvignon Blanc	91	0	0	0	91	0%
Semillon	12	0	0	0	12	0%
Other White	8	0	0	0	8	0%
TOTAL WHITE WINEGRAPES	450	0	0	3	453	1%
TOTAL ALL VARIETIES	5682	5	18	21	5726	0%

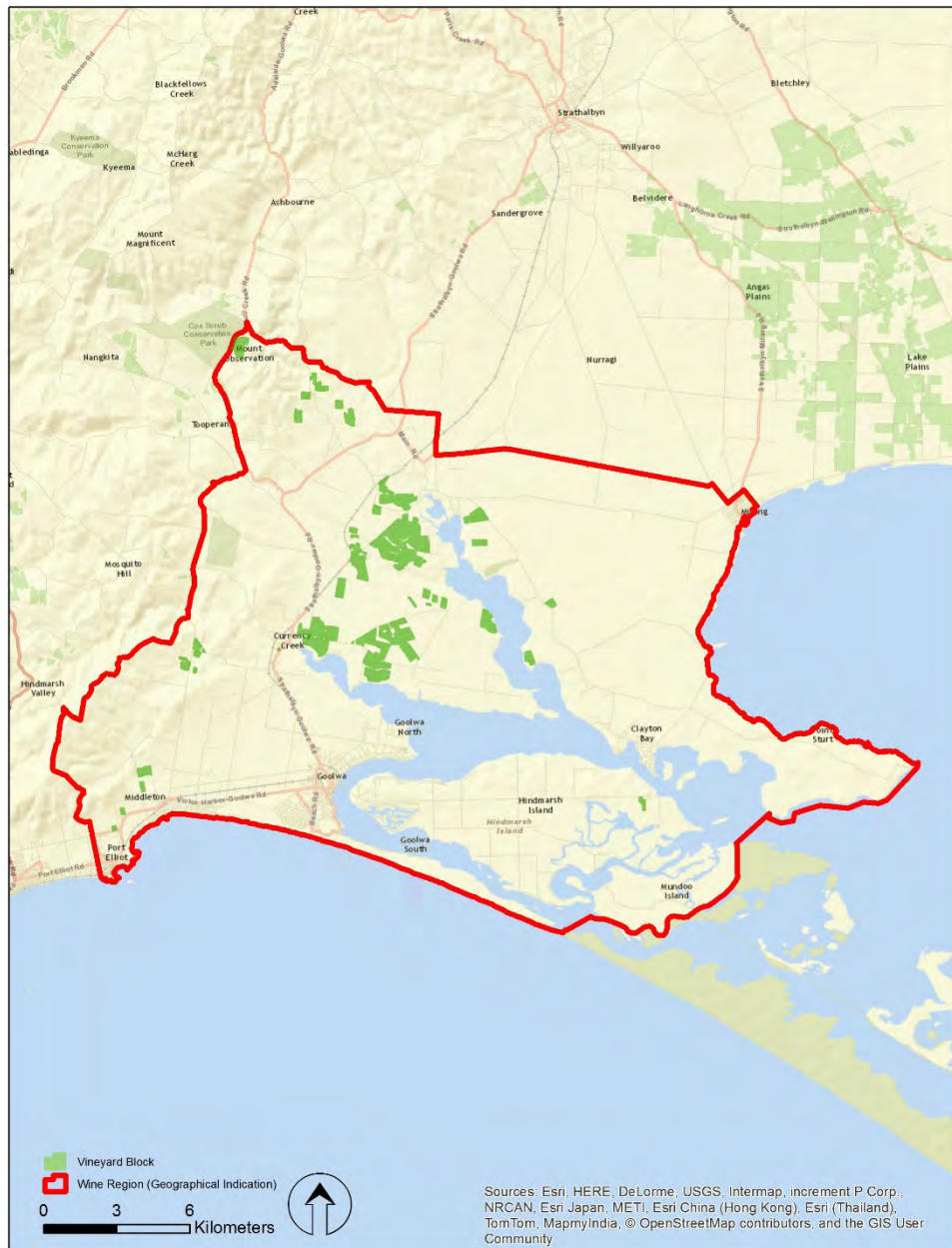
Source: Vinehealth Australia

# SA Winegrape Crush Survey 2019

## Regional Summary Report

### Currency Creek Wine Region

*Wine Australia July 2019*



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

**Currency Creek  
Wine Region**



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# Currency Creek

## Vintage overview

### VINTAGE REPORT

The 2019 season in Currency Creek turned into one of the most challenging seen for many years.

Late winter rainfall assisted with replenishing poor soil moisture levels prior to budburst, but variable weather early in the season impacted on the timing of bud-burst and led to the first challenge to even-ness of shoot length and subsequently to fruit maturation. Strong storms in late spring provided some leaf and fruit damage but overall rainfall was low and continued that way for the balance of the season.

Flowering commenced with ideal conditions but several weeks of inclement weather events at this critical time deferred the later flowering vines even further, creating a greater difference between the timing of the early and late flowers which followed through to veraison.

Fruit set was good in the reds and average in the whites.

The season progressed adequately with little rainfall and low disease pressure until late January. Then, an extreme heat event led to a maximum of 46.8°C on 24th January and a temperature of over 40°C well into the night, which wreaked havoc with fruit condition. Despite having adequate moisture in the root zone, the vines were unable to take it up fast enough and the fruit suffered accordingly.

This extreme event was followed by several more hot days which together wiped out somewhere between 40-50 per cent of red fruit and 50-75 per cent of the white fruit with Sauvignon Blanc being the most affected.

The lack of rainfall late in the season allowed the fruit to be hung out until flavour ripeness caught up to physiological maturity. The resulting wines are very strong with great colour and intensity, although yields are much reduced.

*David Watkins, Currency Creek Wine Region Association*

### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Currency Creek in 2019 was 3,139 tonnes, compared with 5,711 tonnes in 2018 – a reduction of 39 per cent on what was previously the lowest crop for at least 10 years (since crush reports have been separately collected for Currency Creek).

There were 12 respondents to the survey who reported crushing grapes from Currency Creek in 2019, compared with 11 in 2018.

Over the past five years (2014-2018), the average crush for the region has been 7,884 tonnes. The 2019 crush was 60 per cent lower than the average and the lowest ever recorded for the region.

The estimated total value of fruit from the region was \$3.2 million, compared with \$4.7 million in 2018, 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 13 per cent to \$1167 per tonne and Shiraz up by 18 per cent to \$1182 per tonne.

The price dispersion data shows that 100 per cent of all red purchased fruit and 65 per cent of all white purchased fruit from the region was purchased at \$600 or above.

There were no new plantings recorded in the region for the fourth year in a row. Total plantings are 995 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+							
<b>Red</b>													
Cabernet Sauvignon	276			276			\$321,691	\$1,167	13%	309	53%	585	\$682,229
Durif										136	100%	136	\$168,365
Grenache										69	100%	69	\$121,601
Merlot	48			48						172	78%	220	\$131,796
Petit Verdot										35	100%	35	\$41,836
Pinot Noir										64	100%	64	\$108,042
Sangiovese	25			25					-100%		0%	25	\$32,892
Shiraz	687			667	21		\$812,437	\$1,182	18%	296	30%	984	\$1,162,528
Tempranillo	20				20						0%	20	\$29,370
<b>Red Total</b>	<b>1,056</b>			<b>1,015</b>	<b>40</b>		<b>\$1,225,082</b>	<b>\$1,161</b>	<b>12%</b>	<b>1,081</b>	<b>51%</b>	<b>2,136</b>	<b>\$2,478,659</b>
<b>White</b>													
Chardonnay	71		71							484	87%	555	\$302,334
Gewurztraminer										100	100%	100	\$82,432
Pinot Gris/Grigio	59			59						161	73%	220	\$229,963
Prosecco	22			22							0%	22	\$28,002
Sauvignon Blanc	49			49						57	54%	106	\$63,408
<b>White Total</b>	<b>200</b>		<b>71</b>	<b>129</b>			<b>\$157,548</b>	<b>\$786</b>	<b>-4%</b>	<b>802</b>	<b>80%</b>	<b>1,003</b>	<b>\$706,139</b>
<b>Grand Total</b>	<b>1,256</b>		<b>71</b>	<b>1,145</b>	<b>40</b>		<b>\$1,382,630</b>	<b>\$1,101</b>	<b>10%</b>	<b>1,883</b>	<b>60%</b>	<b>3,139</b>	<b>\$3,184,797</b>

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

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	298	0	0	0	298	0%
Grenache	11	0	0	0	11	0%
Merlot	60	0	0	0	60	0%
Pinot Noir	12	0	0	0	12	0%
Sangiovese	4	0	0	0	4	0%
Shiraz	339	0	0	0	339	0%
Other Red	26	0	0	0	26	0%
TOTAL RED WINEGRAPES	750	0	0	0	750	0%
White winegrapes						
Chardonnay	122	0	0	0	122	0%
Pinot Gris/Grigio	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 WINEGRAPES	243	0	0	0	243	0%
Unknown variety	2	0	0	0	2	0%
TOTAL ALL VARIETIES	995	0	0	0	995	1%

Source: Vinehealth Australia



# SA Winegrape Crush Survey 2019

## Regional Summary Report

### Fleurieu other Inc Southern Fleurieu and Kangaroo Island

*Wine Australia July 2019*

DATUM: GDA94  
 PROJECTION: MGA Zone 54  
 DATE: 8<sup>th</sup> 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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# Fleurieu other

## Vintage overview

*Fleurieu other in this report includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are outside any GI regions in the Fleurieu zone. The total area of vines included in this definition is 850 hectares.*

### OVERVIEW OF VINTAGE STATISTICS

The harvest from the Fleurieu other areas was 3,452 tonnes in 2019, 18 per cent lower than the 4,200 tonnes crushed in 2018 but the second highest since 2015.

There were 31 respondents to the survey who reported crushing grapes from Fleurieu other in 2019, compared with 25 in 2018.

Over the past five years, the average crush across Fleurieu other has been 3,379 tonnes. The 2019 crush was 2 per cent above the average. The minimum crush over the period was 2,869 tonnes in 2014, while the maximum was the 2018 crush.

The total estimated value of grapes from Fleurieu other in 2019 was \$3.3 million, very similar to the \$3.7 million in 2018, as a result of an overall 8 per cent increase in average purchase value partially offsetting the lower tonnage. The average purchase price for Shiraz increased by 13 per cent to \$1171 per tonne, while Chardonnay increased by 19 per cent to \$628 per tonne and Sauvignon Blanc increased by 9 per cent to \$762 per tonne. These increases in the white varieties reversed similar sized decreases last year.

The price dispersion data shows an upward shift in the price dispersion since last year. All red grapes were purchased at \$600 per tonne or above, while for white varieties, 32 per cent were purchased at below \$600 per tonne compared with 37 per cent in 2018.

There have been very few reported new plantings in Southern Fleurieu, Kangaroo Island, or elsewhere in Fleurieu other for the past four years. The total area as at April 30, 2019 is 850 hectares – 2 hectares less than last year, and 120 hectares less than in 2013.

# Fleurieu 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+							
<b>Red</b>													
Cabernet Franc	4					4					0%	4	\$9,335
Cabernet Sauvignon	350			322	8	21	\$447,640	\$1,279	5%	73	17%	423	\$540,462
Grenache	23			23							0%	23	\$13,614
Malbec	1			1							0%	1	\$1,180
Merlot	138			135	3		\$134,094	\$975		11	7%	148	\$144,693
Pinot Noir	113			84	6	23	\$185,914	\$1,647		3	3%	116	\$190,854
Shiraz	974			920	15	39	\$1,140,635	\$1,171	13%	58	6%	1,032	\$1,207,974
Tempranillo	15				1	15	\$33,536	\$2,233			0%	15	\$33,536
<b>Red Total</b>	<b>1,618</b>			<b>1,484</b>	<b>32</b>	<b>102</b>	<b>\$1,965,947</b>	<b>\$1,215</b>	<b>13%</b>	<b>144</b>	<b>8%</b>	<b>1,762</b>	<b>\$2,141,648</b>
<b>White</b>													
Chardonnay	578		371	206			\$362,997	\$628	19%	51	8%	629	\$394,996
Pinot Gris/Grigio	280			269	11		\$236,681	\$845		79	22%	360	\$303,800
Prosecco	71			71							0%	71	\$49,525
Riesling	26		25		1						0%	26	\$13,320
Sauvignon Blanc	415			415			\$316,453	\$762	9%	104	20%	520	\$395,879
Semillon	52		52							33	39%	85	\$38,462
<b>White Total</b>	<b>1,422</b>		<b>449</b>	<b>961</b>	<b>12</b>		<b>\$1,002,565</b>	<b>\$705</b>	<b>6%</b>	<b>268</b>	<b>16%</b>	<b>1,690</b>	<b>\$1,195,981</b>
<b>Grand Total</b>	<b>3,040</b>		<b>449</b>	<b>2,446</b>	<b>43</b>	<b>102</b>	<b>\$2,968,512</b>	<b>\$976</b>	<b>8%</b>	<b>412</b>	<b>12%</b>	<b>3,452</b>	<b>\$3,337,628</b>

*Includes crush from Southern Fleurieu (845 tonnes), Kangaroo Island (64 tonnes) and other Fleurieu (2543 tonnes).*

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

# Fleurieu other

## Current plantings by variety and year planted – Southern Fleurieu

Variety	Year planted				Total area (ha)	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	70	0	0	0	70	0%
Merlot	35	0	0	0	35	0%
Pinot Noir	25	0	0	0	25	0%
Shiraz	116	0	0	0	116	0%
Other Red	4	0	0	0	4	0%
TOTAL RED WINEGRAPES	250	0	0	0	250	0%
White winegrapes						
Chardonnay	85	0	0	0	85	0%
Pinot Gris/Grigio	25	0	0	0	25	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	58	0	0	0	58	0%
Semillon	22	0	0	0	22	0%
Viognier	9	0	0	0	9	0%
Other White	5	0	0	0	5	0%
TOTAL WHITE WINEGRAPES	207	0	0	0	207	0%
Unknown variety	4	0	0	0	4	0%
TOTAL ALL VARIETIES	461	0	0	0	461	0%

Source: Vinehealth Australia

# Fleurieu other

## Current plantings by variety and year planted – Kangaroo Island

Variety	Year planted				Total area (ha)	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	41	0	2	0	43	0%
Merlot	4	0	0	0	4	0%
Shiraz	48	0	0	0	48	0%
Other Red	8	0	2	0	10	0%
TOTAL RED WINEGRAPES	106	0	4	0	110	0%
White winegrapes						
Chardonnay	8	0	2	0	10	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other White	5	0	0	0	6	0%
TOTAL WHITE WINEGRAPES	25	0	2	0	28	0%
Unknown variety	15	0	0	0	15	0%
TOTAL ALL VARIETIES	146	0	6	0	153	0%

Source: Vinehealth Australia

# Fleurieu other

## Current plantings by variety and year planted – Fleurieu zone (other)

Variety	Year planted				Total area (ha)	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	36	0	0	0	36	0%
Shiraz	92	0	0	0	92	0%
Other Red	4	0	0	0	4	0%
TOTAL RED WINEGRAPES	132	0	0	0	132	0%
White winegrapes						
Chardonnay	29	0	0	0	29	0%
Pinot Gris/Grigio	16	0	0	0	16	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	6	0	0	4	10	42%
TOTAL WHITE WINEGRAPES	64	0	0	4	68	6%
Unknown variety	36	0	0	0	36	0%
TOTAL ALL VARIETIES	232	0	0	4	236	2%

*Plantings in the Fleurieu GI zone that are outside any GI region*

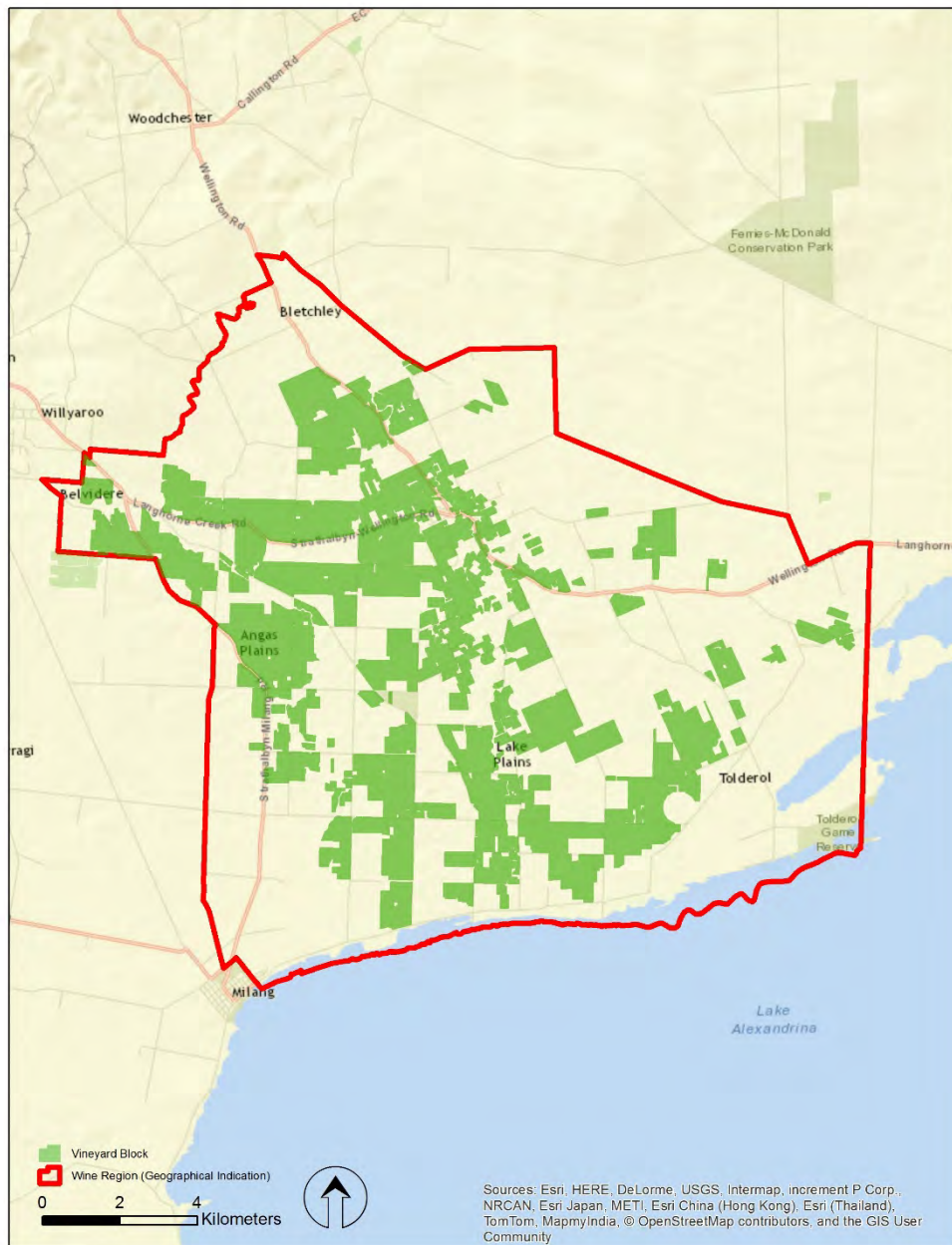
Source: Vinehealth Australia

# SA Winegrape Crush Survey 2019

## Regional Summary Report

### Langhorne Creek Wine Region

*Wine Australia July 2019*



DATUM: GDA94  
PROJECTION: MGA Zone 54  
DATE: 3<sup>rd</sup> August 2017  
SOFTWARE: ESRI ArcGIS v10.4  
DATA SOURCE:  
Vineyard Block - Vinehealth Australia  
Wine Region - Wine Australia

Langhorne Creek  
Wine Region

 **Vinehealth**  
AUSTRALIA

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# Langhorne Creek

## Vintage overview

### VINTAGE REPORT

In summary, 2019 was a somewhat compressed, but trouble free harvest in Langhorne Creek with excellent wine quality.

Annual rainfall (264mm), especially winter rainfall, was well below average, in keeping with trends throughout the country. All months experienced below average rainfall except November and December. Oddly, December was the highest rainfall month for the year at 47mm. This helped with setting up canopies for the warm summer ahead.

The summer was dry and hot, with 46.7°C recorded on the 24th of January in nearby Strathalbyn, setting a new record; a common story across South Australia. The early season weather gave the impression that the region may suffer crop losses reflective of 2009; however good irrigation management and luck prevailed. Overall the region did suffer some losses with the reduced quantity compensated for by improved quality. The reliable, cooling southerly breezes most evenings during the summer and autumn ripening periods made the difference yet again.

Vineyard management was extremely important this year given the trying conditions. Low rainfall helped manage disease pressure and reduced excess vigour on floodplain blocks, but many crops were a bit light.

The warmer than average conditions encouraged growers to harvest quickly to capture natural acidity and fresh fruit flavours. Harvest began for whites in the region in the first week of February and reds commenced around the third week of February. 2019 saw a rapid harvest with a good portion of fruit picked within five weeks. Harvest continued beyond this to mid-April for those seeking fuller bodied wines.

Yields have ranged from full crop to a complete write-off; luckily, both ends of the spectrum were rare. We estimate that in 2019, Langhorne Creek will have lower than average overall yields.

*Lian Jaensch, Langhorne Creek Grape and Wine Incorporated*

### OVERVIEW OF VINTAGE STATISTICS

The harvest from the Langhorne Creek region in 2019 was 43,137 tonnes, 3 per cent lower than the 2018 crush of 44,695 tonnes.

There were 47 respondents to the survey who reported crushing grapes from Langhorne Creek in 2019, compared with 41 in 2018.

Over the past five years (2014-2018), the average crush for Langhorne Creek has been 50,303 tonnes. The highest was 60,119 tonnes in 2016, while the lowest was 38,921 tonnes in 2015. This year's vintage was 14 per cent below the average.

The value of fruit from the region was estimated to be just under \$45 million, compared with \$40 million in 2018, with the slightly lower tonnage offset by a 16 per cent higher overall average purchase value. All the major red varieties increased in value, with Cabernet Sauvignon up 17 per cent to \$1136 per tonne and Shiraz up 16 per cent to \$1204 per tonne. The average price for Cabernet Sauvignon is now at its highest since 2003. Chardonnay also increased – up 6 per cent to \$586 per tonne, and Pinot Gris increased 3 per cent to \$966 per tonne – reversing an equal decrease in 2018.

The price dispersion data shows an upward shift in prices, with 5 per cent of red tonnages purchased at \$1500 per tonne or higher, compared with 1 per cent. For the whites, 59 per cent were purchased at \$600 per tonne or above, compared with 40 per cent in 2018.

There were 60 hectares of new plantings in Langhorne Creek in the 2018 planting season, 45 hectares being Shiraz.

The total area planted as at 30 April 2019 was 5,959 hectares compared with 5,895 hectares in 2013. More than two-thirds of all plantings are Cabernet Sauvignon and Shiraz.

# Langhorne Creek

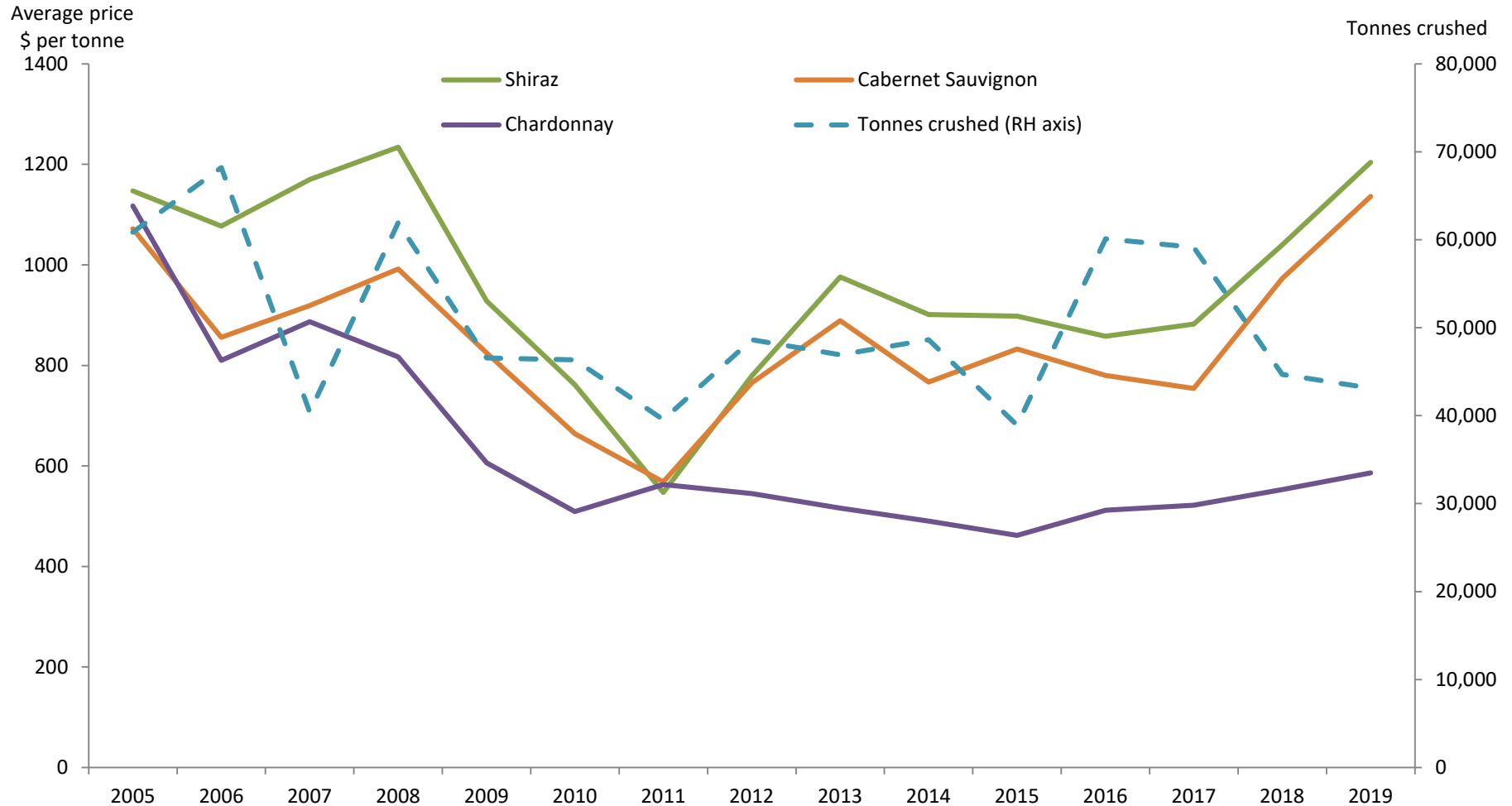
## Winegrape intake summary table

	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+							
<b>Red</b>													
Barbera	3			3							0%	3	\$2,232
Cabernet Franc	5			5							0%	5	\$4,160
Cabernet Sauvignon	8,318			7,970	295	53	\$9,448,447	\$1,136	17%	4,493	35%	12,812	\$14,552,209
Dolcetto	59			59			\$44,612	\$758		33	36%	92	\$69,632
Durif	8			8						212	96%	220	\$208,848
Grenache	110			110			\$79,634	\$723	-2%	513	82%	623	\$450,238
Lagrein	37			37			\$38,029	\$1,022	2%		0%	37	\$38,029
Malbec	665			580	83	2	\$794,189	\$1,194	20%	49	7%	714	\$853,180
Mataro/Mourvedre	43			43						4	9%	47	\$37,864
Merlot	2,017			2,017			\$1,805,267	\$895	15%	2,161	52%	4,178	\$3,739,294
Montepulciano										8	100%	8	\$13,096
Petit Verdot	4			4						25	85%	30	\$29,890
Pinot Meunier	49			49							0%	49	\$38,864
Pinot Noir	639			639			\$513,278	\$803	1%	531	45%	1,170	\$939,931
Sangiovese	58			58						70	55%	128	\$153,336
Shiraz	9,863			9,153	595	115	\$11,877,240	\$1,204	16%	5,759	37%	15,622	\$18,811,987
Tempranillo	11			11							0%	11	\$9,568
Other red	20				20					3	14%	24	\$42,408
<b>Red Total</b>	<b>21,911</b>			<b>20,746</b>	<b>994</b>	<b>171</b>	<b>\$24,808,024</b>	<b>\$1,132</b>	<b>16%</b>	<b>13,862</b>	<b>39%</b>	<b>35,773</b>	<b>\$39,994,766</b>
<b>White</b>													
Chardonnay	3,287		1,666	1,621			\$1,925,846	\$586	6%	781	19%	4,068	\$2,383,525
Chenin blanc										6	100%	6	\$5,275
Fiano	4				4					38	91%	42	\$72,216
Gewurztraminer										209	100%	209	\$172,329
Muscat Blanc a Petits Grains										8	100%	8	\$8,141
Pinot Gris/Grigio	322			322			\$310,887	\$966	3%	122	27%	443	\$428,493
Riesling	92		92							1,500	94%	1,592	\$955,200
Sauvignon Blanc	569			569			\$421,220	\$741		324	36%	893	\$661,296
Verdelho										68	100%	68	\$66,063
Vermentino	32			32						3	8%	35	\$34,017
<b>White Total</b>	<b>4,305</b>	<b>-</b>	<b>1,758</b>	<b>2,544</b>	<b>4</b>	<b>-</b>	<b>\$2,751,340</b>	<b>\$639</b>	<b>5%</b>	<b>3,058</b>	<b>42%</b>	<b>7,364</b>	<b>\$4,786,555</b>
<b>Grand Total</b>	<b>26,216</b>	<b>-</b>	<b>1,758</b>	<b>23,290</b>	<b>998</b>	<b>171</b>	<b>\$27,559,364</b>	<b>\$1,051</b>	<b>16%</b>	<b>16,920</b>	<b>39%</b>	<b>43,137</b>	<b>\$44,781,320</b>

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

## Historical weighted average price vs tonnes crushed



# Langhorne Creek

## Current plantings by variety and year planted

Variety	Year planted				Total area (ha)	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Franc	8	0	0	0	9	0%
Cabernet Sauvignon	1,892	18	4	15	1,929	1%
Dolcetto	11	0	0	0	11	0%
Grenache	78	0	0	0	78	0%
Lagrein	10	0	0	0	10	0%
Malbec	100	0	0	0	100	0%
Merlot	386	0	0	0	386	0%
Nebbiolo	8	0	0	0	8	0%
Petit Verdot	13	0	0	0	13	0%
Sangiovese	30	0	0	0	30	0%
Shiraz	2,200	24	2	45	2,271	2%
Other Red	146	5	2	0	153	0%
TOTAL RED WINEGRAPES	4,882	47	8	60	4,998	1%
White winegrapes						
Chardonnay	518	0	0	0	518	0%
Pinot Gris	49	4	0	0	53	0%
Riesling	162	0	0	0	162	0%
Sauvignon Blanc	80	0	0	0	80	0%
Semillon	4	0	0	0	4	0%
Verdelho	36	0	0	0	36	0%
Viognier	18	0	0	0	18	0%
Other White	34	0	0	0	34	0%
TOTAL WHITE WINEGRAPES	901	4	0	0	905	0%
Rootstock Block	6	0	0	0	6	0%
Unknown variety	50	0	0	0	50	0%
TOTAL ALL VARIETIES	5,839	51	8	60	5,959	1%

Source: Vinehealth Australia



# Wine Australia July 2019

# Limestone Coast other

## Vintage overview

### VINTAGE REPORT – MOUNT BENSON

2019 proved once again how different every vintage is. Two frost events and one day with extreme heat overlay what was otherwise a more traditional vintage for us on the coast.

The season was well founded upon a wet winter with higher than average rainfall but average temperatures. Budburst was later than in recent years with most varieties completing budburst 1-2 weeks later, realigning our harvest timing to our more traditional vintage season. A heavy rainfall event in November affected flowering especially for Pinot Gris, Cabernet Sauvignon and Sauvignon Blanc, with these varieties showing some 'hen-and-chicken'. Temperatures during the summer season were also in line with long term averages; however a heat spike in late January including a record hot day of 41.8°C assisted to bring the white harvest forward slightly. While the rest of the state battled this heat and lack of water, the cool and more importantly consistent climatic conditions of Mount Benson again reinforced its importance as a premium wine producing region in a changing climate.

Good bright aromatics and vibrancy are once again abundant in whites with great natural acid retention. This natural acid retention translated to the red varieties as well, giving great aging potential to these wines. Flavour and phenolic ripeness in red varieties is appearing to precede the sugar ripeness giving us a much desired lower alcohol vintage.

It has been a challenge for the vignerons this year to fit back into a more traditional vintage with wineries staffing themselves based on the more compressed vintages of recent years. It has been a wonderfully social vintage this year for the winemakers with more time to enjoy a tank sample or two with neighbours while letting the yeasts perform their magic.

*Brian Nitschinsk (Mount Benson Estate) and Anita Goode (Wangolina)*

*Limestone Coast other includes the GI regions of Mount Benson, Mount Gambier and Robe, and the vineyards around Bordertown, Lucindale, and Beachport, as well as those in the Limestone Coast zone but outside the declared GI regions of Padthaway, Coonawarra and Wrattenbully. The total area of vines included in this definition is around 2,080 hectares.*

### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from the Limestone Coast other group of regions in 2019 was 21,162 tonnes, 28 per cent above the 2018 crush but very similar to the 22,154 tonnes crushed in 2017. The 2019 crush was 29 per cent above the five-year average (2014-2018) of 16,455 tonnes. The largest crush in the five-year period was the 2017 crush, while the lowest was 10,248 tonnes in 2015.

There were 48 respondents to the survey who reported crushing grapes from Limestone Coast other in 2019, compared with 31 in 2018.

The total estimated value of fruit from this area was \$21.6 million, 30 per cent above last year's total value of \$15.5 million and also above the total value of \$17 million in 2017, due to increases in the average prices paid for most varieties.

The average prices of all the major varieties increased: Shiraz by 4 per cent to \$1224 per tonne, Cabernet Sauvignon by 3 per cent to \$1088 per tonne and Sauvignon Blanc by 4 per cent to \$897 per tonne.

The price dispersion data shows quite a narrow band, with 96 per cent of reds and 92 per cent of whites purchased at between \$600 and \$1500 per tonne.

There were 34 hectares of new plantings (all Cabernet Sauvignon) in Robe and 7 hectares of Shiraz in Mount Benson in the 2018 planting season. Overall, however, the total area included in Limestone Coast other decreased by 14 hectares to 2080 hectares as at 30 April 2019.



# Limestone Coast 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+							
<b>Red</b>													
Cabernet Franc	36			36						287	89%	323	\$274,856
Cabernet Sauvignon	1,677			1,648	9	19	\$1,824,699	\$1,088	3%	3,905	70%	5,581	\$6,073,480
Dolcetto	130			130							0%	130	\$84,320
Lagrein	2			2							0%	2	\$2,845
Malbec	73			73			\$69,973	\$956		167	69%	240	\$229,346
Mataro/Mourvedre	218			218					-100%	124	36%	343	\$256,890
Merlot	652			652			\$574,652	\$882	16%	2,457	79%	3,108	\$2,741,134
Montepulciano	7			7							0%	7	\$8,880
Petit Verdot	43			43					-100%	245	85%	289	\$240,159
Pinot Noir	226		6	220			\$262,283	\$1,160	9%	390	63%	617	\$715,329
Shiraz	2,319			2,149	114	56	\$2,839,298	\$1,224	4%	3,406	59%	5,725	\$7,009,891
Tempranillo	10			10						37	79%	47	\$65,226
<b>Red Total</b>	<b>5,393</b>		<b>6</b>	<b>5,189</b>	<b>123</b>	<b>75</b>	<b>\$5,910,792</b>	<b>\$1,096</b>	<b>5%</b>	<b>11,019</b>	<b>67%</b>	<b>16,412</b>	<b>\$17,702,355</b>
<b>White</b>													
Chardonnay	713		60	653			\$558,495	\$784	21%	2,100	75%	2,812	\$2,204,062
Pinot Gris/Grigio	235			235			\$233,821	\$997	-10%	51	18%	286	\$284,894
Prosecco	6				6						0%	6	\$9,792
Riesling	14			14							0%	14	\$16,800
Sauvignon Blanc	1,077		72	1,004			\$966,000	\$897	4%	356	25%	1,433	\$1,285,252
Semillon	34		3	30			\$19,978	\$590		143	81%	177	\$104,526
Verdelho	22		22								0%	22	\$10,935
<b>White Total</b>	<b>2,100</b>		<b>157</b>	<b>1,936</b>	<b>6</b>		<b>\$1,815,821</b>	<b>\$865</b>	<b>9%</b>	<b>2,650</b>	<b>56%</b>	<b>4,750</b>	<b>\$3,916,261</b>
<b>Grand Total</b>	<b>7,493</b>		<b>163</b>	<b>7,125</b>	<b>129</b>	<b>75</b>	<b>\$7,726,613</b>	<b>\$1,031</b>	<b>5%</b>	<b>13,669</b>	<b>65%</b>	<b>21,162</b>	<b>\$21,618,617</b>

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 other

Current plantings by variety and year planted – Mount Benson

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
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	4	0	7	178	4%
Other Red	3	0	0	0	3	0%
TOTAL RED WINEGRAPES	338	4	0	7	349	2%
White winegrapes						
Chardonnay	34	0	0	0	34	0%
Pinot Gris/Grigio	43	0	0	0	43	0%
Sauvignon Blanc	66	0	0	0	66	0%
Other White	11	0	0	0	11	0%
TOTAL WHITE WINEGRAPES	154	0	0	0	154	0%
TOTAL ALL VARIETIES	492	4	0	7	503	1%

Source: Vinehealth Australia

# Limestone Coast other

Current plantings by variety and year planted – Mount Gambier

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	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 WINEGRAPES	89	0	0	0	89	0%
White winegrapes						
Chardonnay	42	0	0	0	42	0%
Pinot Gris/Grigio	14	0	0	0	14	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	97	0	0	0	97	0%
Semillon	1	0	0	0	1	0%
Other White	1	0	0	0	1	0%
TOTAL WHITE WINEGRAPES	160	0	0	0	160	0%
TOTAL ALL VARIETIES	249	0	0	0	249	0%

Source: Vinehealth Australia

# Limestone Coast other

## Current plantings by variety and year planted - Robe

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	221	0	0	34	255	13%
Merlot	50	0	0	0	50	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 WINEGRAPES	493	0	0	34	527	6%
White winegrapes						
Chardonnay	76	0	0	0	76	0%
Pinot Gris/Grigio	15	0	0	0	15	0%
Sauvignon Blanc	32	0	0	0	32	0%
Semillon	12	0	0	0	12	0%
TOTAL WHITE WINEGRAPES	135	0	0	0	135	0%
Unknown variety	76	0	0	0	76	0%
TOTAL ALL VARIETIES	704	0	0	34	738	5%

Source: Vinehealth Australia

# Limestone Coast other

Current plantings by variety and year planted – Limestone Coast zone other

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	337	0	0	0	337	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 WINEGRAPES	533	0	0	0	533	0%
White winegrapes						
Chardonnay	41	0	0	0	41	0%
Pinot Gris/Grigio	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 WINEGRAPES	57	0	0	0	57	0%
TOTAL ALL VARIETIES	590	0	0	0	590	0%

*Plantings in the Limestone Coast GI zone that are outside any GI region*

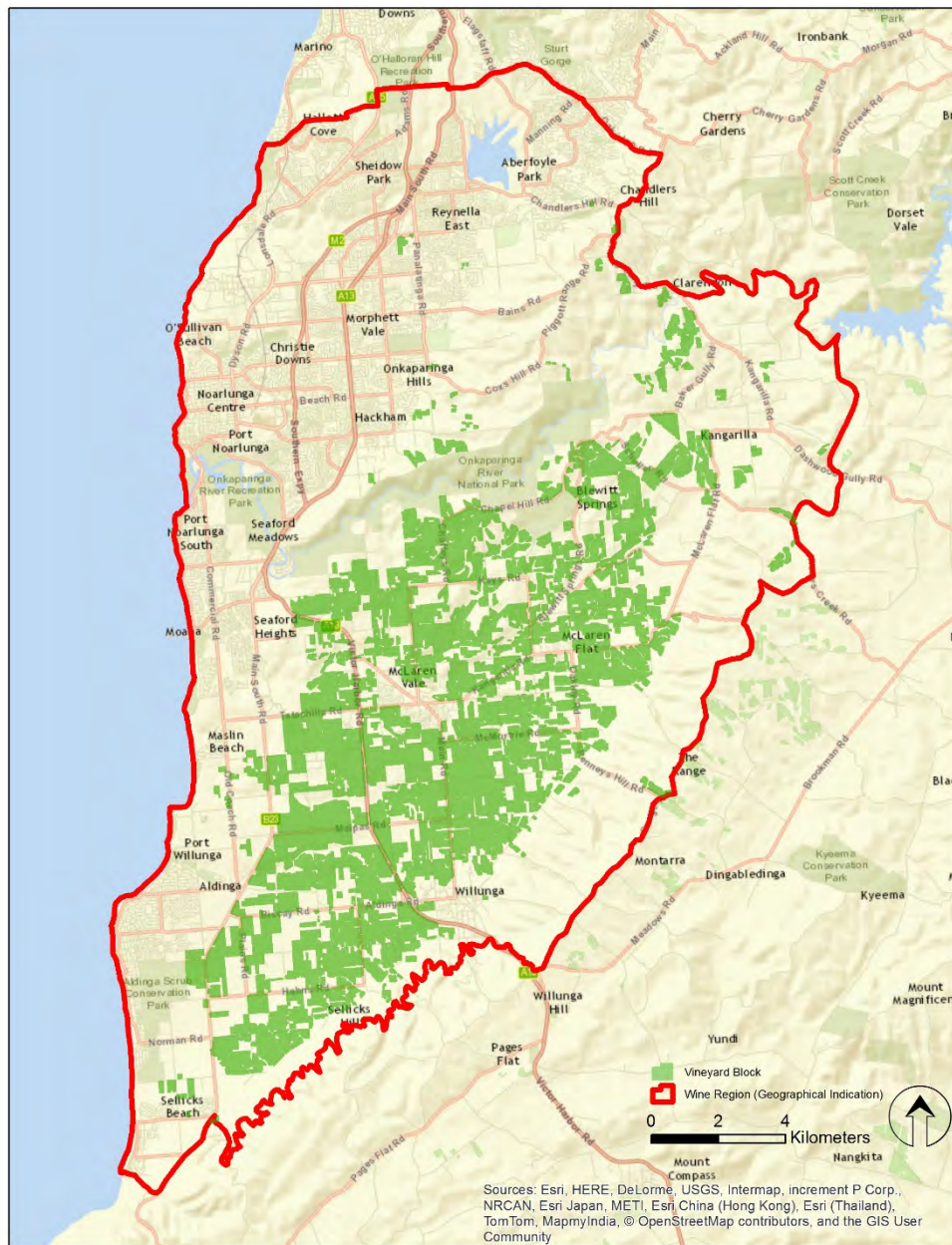
Source: Vinehealth Australia

# SA Winegrape Crush Survey 2019

## Regional Summary Report

### McLaren Vale Wine Region

*Wine Australia July 2019*



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

## McLaren Vale Wine Region



DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth make no representations, either express or implied, that the information displayed is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information displayed.



# McLaren Vale

## Vintage overview

### VINTAGE REPORT

The McLaren Vale wine region relied on its advantage, natural and constructed, to have a successful vintage for 2019. Specifically, proximity to the moderating temperature influence of the Gulf St Vincent, reliable spring rainfall, and access to multiple irrigation sources helped vineyards cope with a challenging dry and hot season.

The growing season rainfall from October to the end of March was 142 mm, compared to the average of 172 mm, the deficit in rain occurring during summer. The dry conditions posed significant challenges for local grape growers; a lack of summer rain meant that irrigation was important to make up for the shortfall. Using timely irrigation, firstly to develop a canopy large enough to sustain vineyard crops and then to maintain the health of vines until harvest, was vital.

On the positive side, disease pressure (governed by rainfall, humidity and temperature) was very low for this vintage.

At harvest, vineyards generally had lower yields of fruit with more intense flavour. Vines had more open bunches, which weighed less than average. The reduction in vine size and yield is partly attributed to the summer, but also to two specific extreme weather events.

Firstly, there was an intense hail storm in late November. The storm saw high speed winds buffet vines and hail fell leaving scars on some fruit. Then in late January we experienced our hottest daytime temperature since January 2009, 45°C, plus several days in late February where the temperatures were about 38°C.

The combination of hail in November and hot weather in January and February is expected to reduce the overall size of our harvest compared to recent years.

*James Hook, McLaren Vale Grape, Wine and Tourism Association*

### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from McLaren Vale was 33,038 tonnes in 2019, a reduction of 9 per cent compared with 2018.

There were 83 respondents to the survey who reported crushing grapes from McLaren Vale in 2019, compared with 78 in 2018.

Over the past five years (2014-18), the average crush has been 36,492 tonnes. This year's vintage was 9 per cent below the average. The largest reported crush in the past five years was the 2017 crush of 44,287 tonnes while the smallest was 28,434 tonnes in 2015.

The total estimated value of the fruit was \$59 million, very similar to last year (\$60 million) but down from \$71 million in 2017, reflecting the decreased tonnage. Overall, average prices increased by 4 per cent for red varieties and 11 per cent for white varieties.

The average price of Shiraz increased by 5 per cent to \$1958 per tonne – the highest since 2000, while Cabernet Sauvignon also increased by 2 per cent to \$1787 per tonne – the highest since 2002. The average price for Chardonnay increased by 11 per cent to \$871 per tonne.

The price dispersion data shows that this year 26 per cent of red grapes were purchased at \$2000 or above, compared with 24 per cent in 2018. For the whites, the vast majority (88 per cent) was purchased at between \$600 and \$1500.

There were 55 hectares of new plantings in McLaren Vale in spring 2018, compared with 48 hectares the previous spring. 96 per cent were red varieties, with 75 per cent being Shiraz. The total planted area as at 30 April 2019 is 7,337 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 per cent as a result of a low regional response rate.*

# McLaren Vale

## Winegrape intake summary table – red winegrapes

	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+							
<b>Red</b>													
Barbera	11				5	6				10	47%	21	\$37,190
Cabernet Franc	44			7	28	9	\$80,477	\$1,818	-3%	12	21%	56	\$101,616
Cabernet Sauvignon	3,769			397	2,747	625	\$6,733,882	\$1,787	2%	3,070	45%	6,839	\$12,219,293
Durif	4				4					8	68%	11	\$16,800
Grenache	1,152		1	248	465	401	\$2,139,073	\$1,858	11%	727	39%	1,879	\$3,490,052
Lagrein	4				4					4	48%	7	\$11,040
Malbec	16			8	9		\$26,488	\$1,639		34	68%	50	\$82,749
Mataro/Mourvedre	349			91	204	46	\$585,774	\$1,676	8%	124	26%	473	\$793,396
Merlot	928			869	46		\$997,357	\$1,074	10%	396	30%	1,325	\$1,422,869
Montepulciano	3				3					15	83%	18	\$33,972
Muscat Rouge a Petits Grains	37		37								0%	37	\$16,614
Nero d'Avola	25				2	23	\$54,712	\$2,197	7%	29	54%	54	\$118,395
Petit Verdot	53			46	8		\$55,503	\$1,043	11%	27	34%	80	\$83,786
Pinot Noir	253			232	21		\$274,887	\$1,086	27%		0%	253	\$274,887
Sangiovese	159			28	131		\$260,673	\$1,639	11%	226	59%	385	\$630,674
Shiraz	12,246			943	7,220	3,910	\$23,981,181	\$1,958	5%	5,868	32%	18,114	\$35,471,439
Tempranillo	185			10	145	29	\$336,887	\$1,824	-5%	115	38%	300	\$546,527
Other red	70			13	22	36	\$126,263	\$1,810	-4%	226	76%	295	\$534,707
<b>Red Total</b>	<b>19,308</b>		<b>38</b>	<b>2,891</b>	<b>11,063</b>	<b>5,084</b>	<b>\$35,698,385</b>	<b>\$1,849</b>	<b>4%</b>	<b>10,889</b>	<b>36%</b>	<b>30,198</b>	<b>\$55,886,007</b>

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

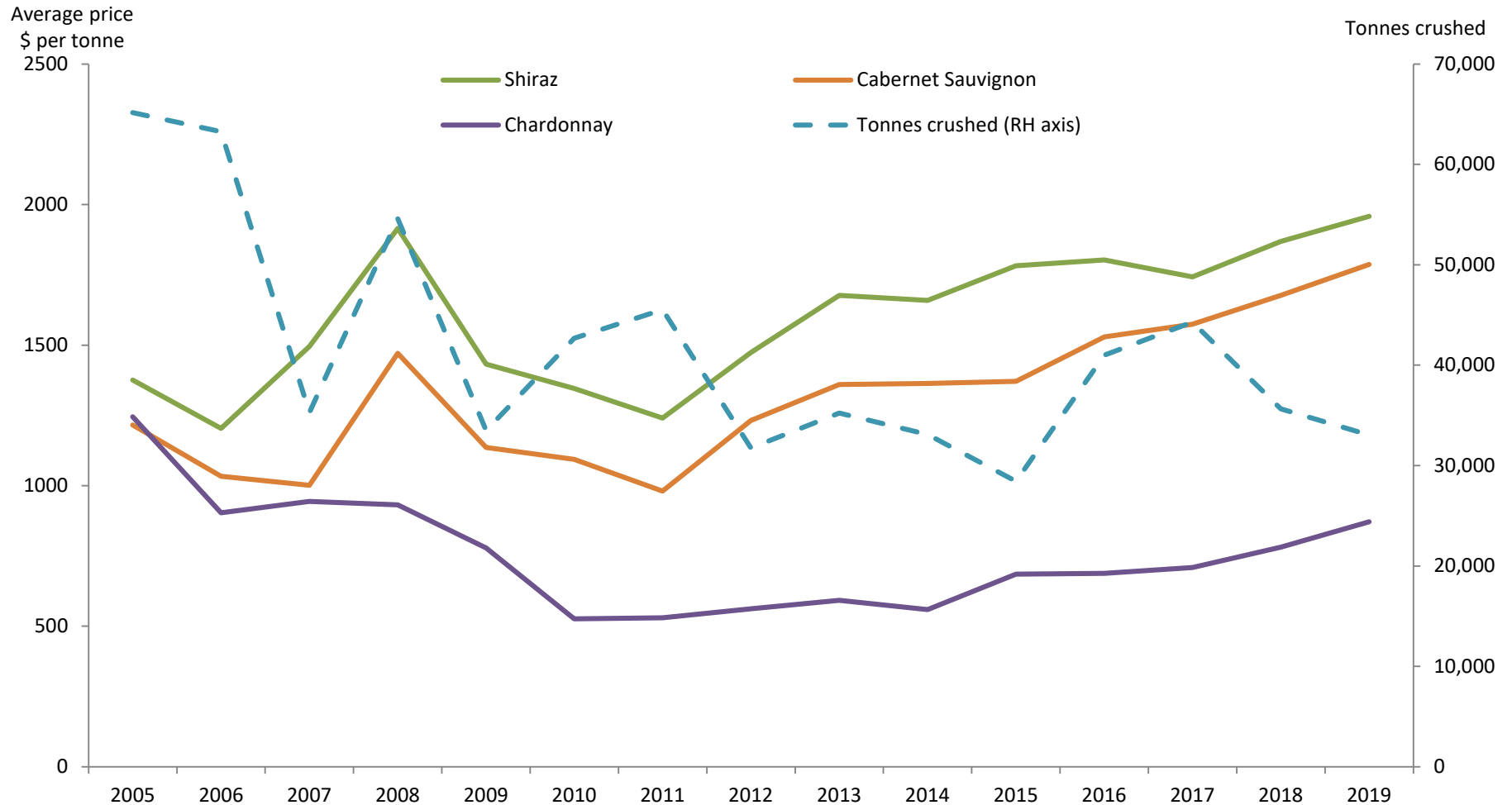
## Winegrape intake summary table – white winegrapes

	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+							
<b>White</b>													
Chardonnay	1,350		9	1,293	48		\$1,175,206	\$871	11%	344	20%	1,694	\$1,474,611
Chenin blanc	68			54	7	7	\$98,668	\$1,461		5	6%	72	\$105,241
Fiano	28				22		\$47,515	\$1,698	-1%	50	64%	78	\$132,734
Gewurztraminer	4			4							0%	4	\$4,026
Marsanne	45			45						23	34%	67	\$76,340
Muscat Blanc a Petits Grains	58			28	30		\$70,648	\$1,225		4	7%	62	\$76,135
Pinot Gris/Grigio	10				10					129	93%	138	\$262,757
Prosecco	8			8						2	23%	11	\$13,884
Riesling	105			90	15					6	6%	111	\$133,743
Roussanne										20	100%	20	\$29,281
Sauvignon Blanc	67			58	5	3	\$78,792	\$1,180	33%	59	47%	126	\$148,817
Semillon	1			1						46	98%	47	\$60,534
Verdelho	37			21	15		\$48,900	\$1,330	38%	44	55%	81	\$107,994
Vermentino	48				48		\$77,356	\$1,613	0%	18	27%	66	\$106,082
Viognier	110			104	6		\$139,084	\$1,261	14%	104	49%	214	\$270,076
Other white	15			14		1	\$20,782	\$1,379		34	69%	49	\$67,917
<b>White Total</b>	<b>1,952</b>		<b>9</b>	<b>1,720</b>	<b>206</b>	<b>11</b>	<b>\$1,964,202</b>	<b>\$1,006</b>	<b>11%</b>	<b>888</b>	<b>31%</b>	<b>2,840</b>	<b>\$3,070,171</b>
<b>Grand Total</b>	<b>21,260</b>		<b>46</b>	<b>4,612</b>	<b>11,269</b>	<b>5,095</b>	<b>\$37,662,586</b>	<b>\$1,771</b>	<b>5%</b>	<b>11,778</b>	<b>36%</b>	<b>33,038</b>	<b>\$58,956,178</b>

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

## Historical weighted average price vs tonnes crushed



# McLaren Vale

## Current plantings by variety and year planted – red winegrapes

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>Red winegrapes</b>						
Barbera	11	0	0	0	11	0%
Cabernet Franc	26	0	0	0	26	0%
Cabernet Sauvignon	1298	4	6	5	1314	0%
Grenache	446	1	4	4	455	1%
Mataro (Mourvedre)	85	4	3	0	92	0%
Merlot	202	0	0	1	203	0%
Petit Verdot	46	0	0	0	46	0%
Pinot Noir	51	0	0	0	51	0%
Sangiovese	44	0	0	0	44	0%
Shiraz	3979	31	50	41	4102	1%
Tempranillo	57	1	4	0	62	0%
Other Red	109	11	12	2	134	1%
<b>TOTAL RED WINEGRAPES</b>	<b>6354</b>	<b>52</b>	<b>79</b>	<b>53</b>	<b>6540</b>	<b>1%</b>

Source: Vinehealth Australia

# McLaren Vale

## Current plantings by variety and year planted – white winegrapes

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>White winegrapes</b>						
Chardonnay	323	0	0	2	325	1%
Chenin Blanc	17	0	0	0	17	0%
Marsanne	11	0	0	0	11	0%
Muscat a Petits Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris/Grigio	21	0	0	0	21	0%
Riesling	32	0	0	0	32	0%
Sauvignon Blanc	56	0	0	0	56	0%
Semillon	28	0	0	0	28	0%
Verdelho	15	0	0	0	15	0%
Vermantino	4	0	0	0	4	0%
Viognier	51	0	0	0	51	0%
Other White	35	7	2	0	45	1%
<b>TOTAL WHITE WINEGRAPES</b>	<b>603</b>	<b>7</b>	<b>2</b>	<b>2</b>	<b>615</b>	<b>0%</b>
Rootstock Block	4	0	0	0	4	0%
Multi-purpose white	3	0	0	0	3	0%
Unknown variety	175	0	0	0	175	0%
<b>TOTAL ALL VARIETIES</b>	<b>7139</b>	<b>59</b>	<b>81</b>	<b>55</b>	<b>7337</b>	<b>1%</b>

Source: Vinehealth Australia

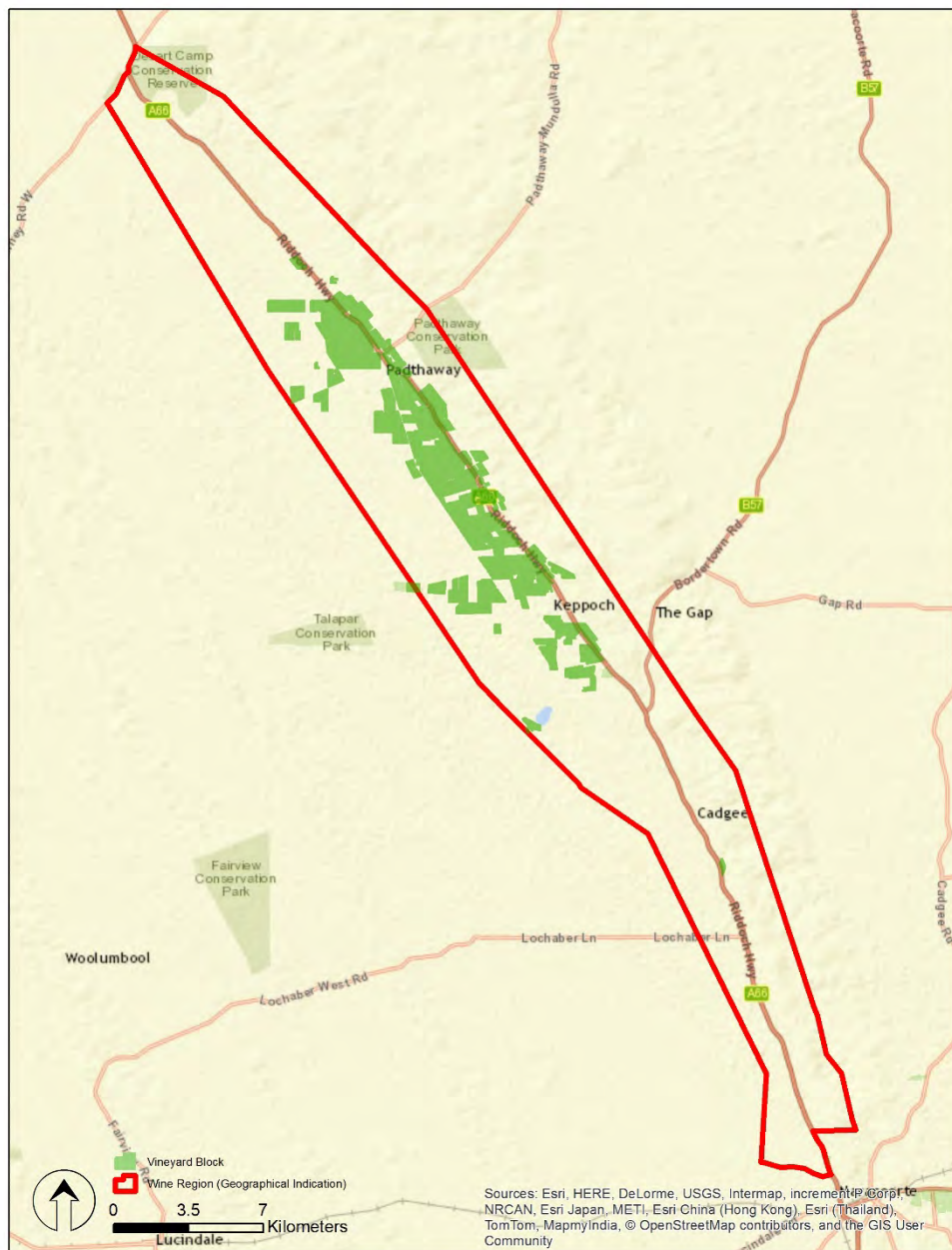


# SA Winegrape Crush Survey 2019

## Regional Summary Report

### Padthaway Wine Region

*Wine Australia July 2019*



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

**Padthaway  
Wine Region**



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# Padthaway

## Vintage overview

### VINTAGE REPORT

Harvest in Padthaway ended between Easter and Anzac Day. Some have made a start on machine pruning where there has been enough leaf fall to do so.

For Padthaway wine grape growers, it has been a rewarding vintage.

Above average rainfall leading up to Christmas made mildew control tricky early; however no issues from that point on made the back half of the season easy to manage with no disease pressure at all and with hardly any frost damage.

A heat spike had some short term impact in unbalancing grape ripening (North - South rows more so than East - West and early varieties more than late) for a short while, but in the main vigneron were well prepared with hydration and canopies to safeguard themselves along with Padthaway's reliable maritime-based cool evening relief. A mild extended ripening period followed right through to harvest and grape quality was high with tonnage average overall. It is apparent that much of Padthaway's grape harvest is destined for high quality wine production.

Cabernet Sauvignon exhibited some yield variation and there was some isolated fruit set issue in Chardonnay and Cabernet Sauvignon, mostly on lighter nutrition soils with perhaps up to 10% loss in some areas.

Overall, grape quality was high and yield average.

Demand for fruit has been high across all varieties and prices have been strong as Padthaway's reliability as a consistent producer of quality wine grapes spreads along with recognition of its proven and sustainable ground water source underpinning local production.

*John Summers, President, Padthaway Grape Growers Association*

### OVERVIEW OF VINTAGE STATISTICS

The harvest from Padthaway in 2019 was 37,215 tonnes, up by 75 per cent compared with the very low 2018 crop of 21,277 tonnes.

Padthaway overtook the Clare Valley, Adelaide Hills and McLaren Vale to record the fifth largest crush of all South Australian regions.

The five-year average crush for Padthaway from 2014 to 2018 is 32,075 tonnes, making the 2019 harvest 16 per cent above the average. The maximum crush in the past five years was 44,922 tonnes in 2016 and the smallest was the 2018 crush.

There were 17 respondents to the survey who reported crushing grapes from Padthaway in 2019, compared with 13 in 2018.

The total estimated value of grapes was up from \$20 million in 2018 to \$38.5 million, with the higher crush enhanced by an overall 10 per cent increase in the average purchase value. All major varieties increased in average purchase value; Chardonnay was up 2 per cent to \$655 per tonne, Shiraz was up 10 per cent to \$1341 per tonne, and Cabernet Sauvignon was up 7 per cent to \$1286 per tonne.

The price dispersion data shows an upward shift in the prices for red varieties, with 9 per cent purchased at \$1500 per tonne or above, compared with 5 per cent in 2018 and just 2 per cent in 2017.

There were just 8 hectares of new plantings in Padthaway in spring 2018, all Shiraz. The total area planted in the region as at 30 April 2019 was 3,881 hectares, a slight decrease compared with last year and 185 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	23			23					87	79%	110	\$110,150	
Cabernet Sauvignon	4,483			4,115	221	147	\$5,766,752	\$1,286	7%	2,329	34%	6,812	\$8,763,469
Lagrein	32				32					0%	32	\$47,580	
Malbec	202			202					982	83%	1,184	\$1,211,599	
Merlot	826			826			\$662,629	\$802	7%	1,351	62%	2,177	\$1,746,266
Pinot Noir	1,202			1,202			\$1,022,970	\$851		104	8%	1,306	\$1,111,476
Sangiovese	35				35					0%	35	\$52,680	
Shiraz	6,520			5,740	379	400	\$8,742,639	\$1,341	10%	3,682	36%	10,201	\$13,680,030
Tempranillo	30					30			3	10%	33	\$82,625	
Red Total	13,352			12,109	666	577	\$16,599,584	\$1,243	8%	8,538	39%	21,890	\$26,805,875
White													
Chardonnay	5,954		1,136	4,818			\$3,902,669	\$655	2%	3,236	35%	9,190	\$6,023,542
Gewurztraminer	175			175						169	49%	343	\$236,974
Pinot Gris/Grigio	1,865			1,865			\$1,783,134	\$956		423	18%	2,288	\$2,187,612
Riesling	332			332						1,640	83%	1,972	\$1,971,720
Sauvignon Blanc	1,052			1,052			\$858,448	\$816	-1%	112	10%	1,164	\$949,998
Verdelho										147	100%	147	\$143,010
Vermentino	24			24						89	79%	112	\$89,792
Viognier	70			70						24	25%	94	\$93,950
Other white										15	100%	15	\$22,157
White Total	9,471		1,136	8,335			\$7,085,776	\$748	0%	5,854	38%	15,325	\$11,718,754
Grand Total	22,823		1,136	20,444	666	577	\$23,685,360	\$1,038	10%	14,392	39%	37,215	\$38,524,629

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

Variety	Year planted				Total area (ha)	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Franc	12	0	0	0	12	0%
Cabernet Sauvignon	922	6	68	0	995	0%
Malbec	78	0	0	0	78	0%
Merlot	172	0	0	0	172	0%
Pinot Noir	90	0	0	0	90	0%
Shiraz	1,162	8	31	8	1,210	1%
Other Red	8	2	0	0	10	0%
TOTAL RED WINEGRAPES	2,444	16	99	8	2,567	0%
White winegrapes						
Chardonnay	816	4	0	0	820	0%
Pinot Gris	157	2	0	0	159	0%
Riesling	148	0	0	0	148	0%
Sauvignon Blanc	80	3	0	0	83	0%
Verdelho	19	0	0	0	19	0%
Viognier	19	0	0	0	19	0%
Other White	28	0	0	0	28	0%
TOTAL WHITE WINEGRAPES	1,267	9	0	0	1,276	0%
Unknown variety	38	0	0	0	38	0%
TOTAL ALL VARIETIES	3,749	25	99	8	3,881	0%

Source: Vinehealth Australia

## Wine Australia July 2019



Vinehealth  
AUSTRALIA

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# Riverland

## Vintage overview

### VINTAGE REPORT

The 2018/19 season will be remembered as hot and dry. The heat summation for the growing season was the second highest on record. There were 48 days above 35°C and 16 days above 40°C. The rainfall for the growing season was 78mm, but only 11mm fell from January to April.

The season started with budburst occurring at around the normal time. Early indications were for at least average crop potential, based on the observed budburst and shoot fruitfulness. The spring months were generally mild and relatively dry, but sufficient rain fell to cause a potentially serious outbreak of downy mildew. Fortunately, grape growers reacted quickly and controlled the outbreak before losses became significant. Warm and sunny weather during the early part of the flowering period resulted in a rapid transition to fruit set, but rain and cooler weather later in flowering slowed the pollination process and affected fruit set.

December saw the arrival of the extreme heat wave events. These events continued through the vintage, until late March, and required exceptional irrigation management to avoid leaf and crop damage. The months of December and January were amongst the hottest on record.

The vintage started in late January, which in recent years has become the normal starting time but is about three weeks earlier than 30 years ago. Soon after vintage started, the rate of ripening was slowed by a series of heatwave events followed by a cool period. As has been the case in most of the recent vintages, the vintage was again highly compressed, with early and late varieties ripening over a short period of time. All parts of the supply chain, including harvest operators, carriers and wineries, were stretched to the limits to bring in the crop at optimal ripeness. Vintage finished in early April for the late ripening varieties.

Despite the difficulties posed by the climatic conditions, most winemakers have reported good to excellent wine quality.

*Ian Macrae, CCW*

### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from the Riverland in 2019 was 474,090 tonnes, 6 per cent above the 2018 harvest of 447,410 tonnes and 5 per cent above the five-year (2014-2018) average crush for the Riverland of 453,017 tonnes.

There were 51 respondents to the survey who reported crushing grapes from the Riverland in 2019, compared with 40 in 2018. The difference in crush could be partly attributable to an improved overall response rate.

The total estimated value of all grapes increased by 28 per cent, from \$176 million to \$227 million, as a result of the increased crush combined with a 21 per cent increase in the overall average price paid.

The average prices for all major red varieties increased. Shiraz was up by 27 per cent to \$617 per tonne, and Cabernet Sauvignon by 30 per cent to \$607 per tonne. For whites, Chardonnay increased by 10 per cent to \$359 per tonne, despite having an increased tonnage against the general trend. Sauvignon Blanc increased by 8 per cent to \$425 per tonne. These increases follow similar increases in 2018 and 2017, and the average prices for all the top three varieties are the highest since 2008.

The price dispersion data for reds shows a significant upward shift in prices, with 72 per cent of red tonnages purchased at \$600 or above compared with almost none in 2018. This shift was not observed in the whites.

There were 220 hectares of new plantings in the 2018 planting season. Cabernet Sauvignon (61 hectares), Pinot Gris/Grigio (53 hectares) and Shiraz (41 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 very little change in the total planted area since last year. The total planted area is 20,366 hectares, 400 hectares less than it was in 2013.



# Riverland

## Winegrape intake summary table – red winegrapes

	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+							
<b>Red</b>													
Barbera	8		8								0%	8	\$3,600
Cabernet Franc	6		6							0	8%	6	\$2,679
Cabernet Sauvignon	54,529		8,114	46,415			\$33,079,358	\$607	30%	17,097	24%	71,626	\$43,450,943
Dolcetto	5		5								0%	5	\$1,800
Durif	780		45	736			\$533,871	\$684	17%	384	33%	1,164	\$796,281
Grenache	4,614		4,167	447			\$2,381,612	\$516	30%	169	4%	4,783	\$2,469,079
Lagrein	10		4	5			\$7,802	\$794	-14%		0%	10	\$7,802
Malbec	261		261							273	51%	533	\$240,066
Mataro/Mourvedre	2,481		1,849	631			\$1,260,147	\$508	14%	52	2%	2,532	\$1,286,381
Merlot	17,871		14,637	3,234			\$10,644,137	\$596	33%	9,519	35%	27,390	\$16,313,786
Montepulciano	130		90	40			\$74,819	\$575	-15%	45	26%	175	\$100,609
Muscat Rouge a Petits Grains	244		244				\$117,882	\$483		1	0%	245	\$118,172
Nero d'Avola	24			24			\$25,785	\$1,057			0%	24	\$25,785
Petit Verdot	7,233		6,915	318			\$3,642,342	\$504	20%	5,121	41%	12,354	\$6,221,313
Pinot Noir	7,036		6,836	200			\$3,488,030	\$496	14%	1,021	13%	8,058	\$3,994,247
Ruby Cabernet	1,123		1,112	11			\$576,356	\$513	22%	1,174	51%	2,297	\$1,178,446
Sangiovese	94		39	55					-100%	406	81%	500	\$269,158
Shiraz	91,611		6,382	85,229			\$56,539,010	\$617	27%	27,255	23%	118,866	\$73,359,752
Tarrango	192	192									0%	192	\$55,488
Tempranillo	1,118		1,002	116			\$604,439	\$541	18%	195	15%	1,313	\$710,020
Other red	1,329		1,189	140			\$761,857	\$573	21%	1,316	50%	2,645	\$1,516,706
<b>Red Total</b>	<b>190,699</b>	<b>192</b>	<b>52,904</b>	<b>137,603</b>			<b>\$113,968,905</b>	<b>\$598</b>	<b>27%</b>	<b>64,028</b>	<b>25%</b>	<b>254,727</b>	<b>\$152,122,110</b>

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

# Riverland

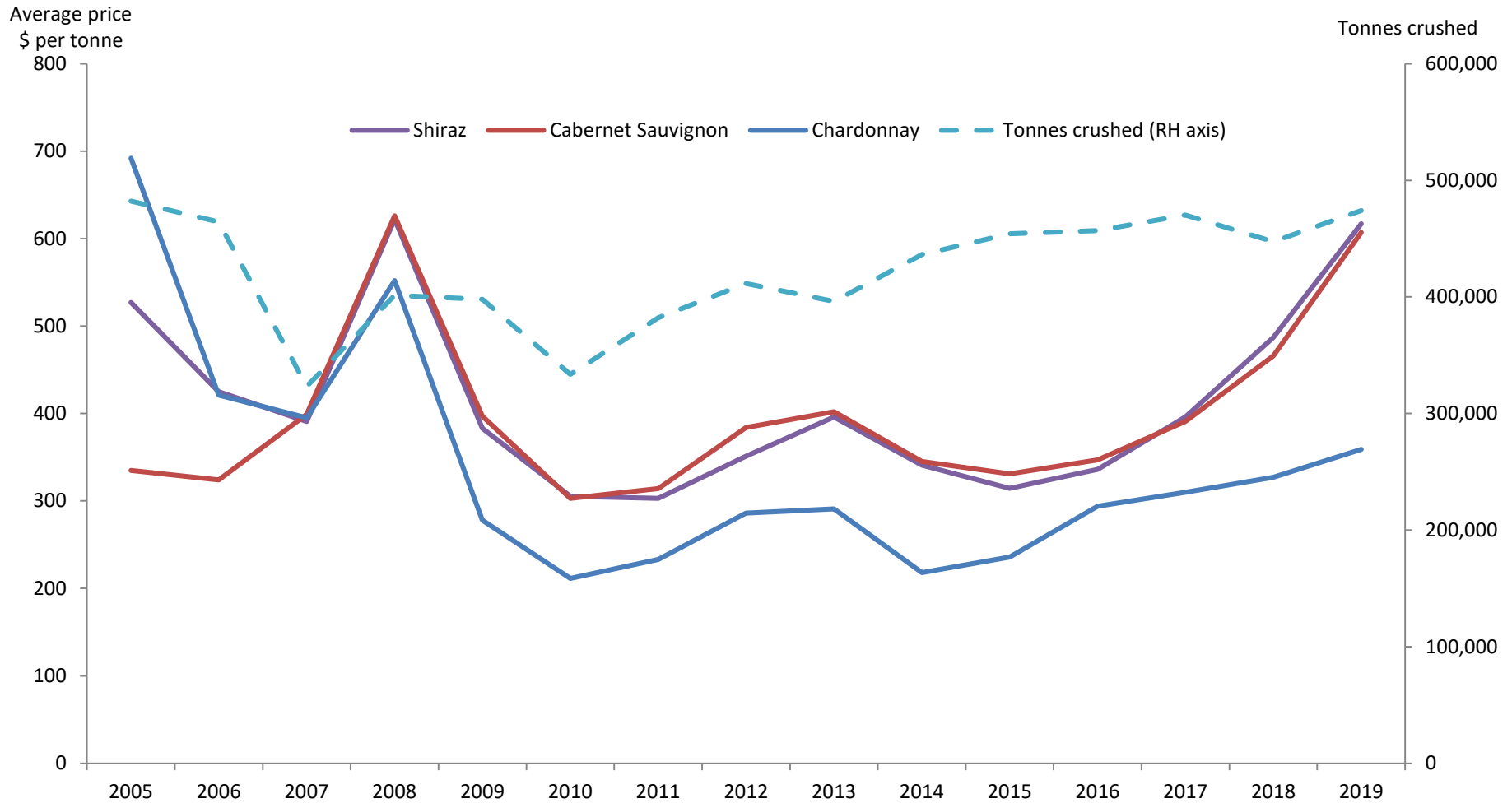
## Winegrape intake summary table – white winegrapes

	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+							
<b>White</b>													
Canada Muscat	27		27							55	67%	82	\$40,890
Chardonnay	97,102		96,283	820			\$34,897,324	\$359	10%	19,521	17%	116,623	\$41,912,795
Chenin blanc	1,561	1,375	186				\$410,381	\$263	6%	6	0%	1,567	\$412,032
Colombard	22,684	21,532	1,152				\$5,924,933	\$261	9%	3,515	13%	26,199	\$6,843,118
Doradillo	114	54	60							25	18%	139	\$33,443
Fiano	141		131	10			\$68,901	\$489			0%	141	\$68,901
Gewurztraminer	927	8	919				\$340,495	\$367	7%	1,352	59%	2,279	\$836,732
Gruner Veltliner	2		2							113	98%	115	\$34,515
Moscato Giallo	83		83								0%	83	\$25,005
Muscadelle (Tokay)										40	100%	40	\$0
Muscat Blanc a Petits Grains	3,750	2,726	1,023				\$1,148,193	\$306	-6%	470	11%	4,220	\$1,292,213
Muscat Gordo Blanco	23,927	23,194	733				\$6,174,554	\$258	9%	3,573	13%	27,500	\$7,096,618
Pinot Gris/Grigio	3,970		3,970				\$2,012,486	\$507	-1%	874	18%	4,844	\$2,455,649
Prosecco	41			41							0%	41	\$31,385
Riesling	1,567	30	1,537				\$531,353	\$339	0%	425	21%	1,992	\$675,383
Roussanne	7		7								0%	7	\$2,142
Sauvignon Blanc	15,408		15,408				\$6,555,588	\$425	4%	4,106	21%	19,514	\$8,302,379
Semillon	4,790	2,432	2,358				\$1,414,790	\$295	3%	3,298	41%	8,088	\$2,388,769
Sultana	434	434					\$113,653	\$262	9%		0%	434	\$113,653
Verdelho	1,088	434	654				\$324,784	\$299	-21%	837	43%	1,925	\$574,791
Vermentino	588	172	267	149			\$248,547	\$423	-9%	173	23%	761	\$321,636
Viognier	1,778	551	991	236			\$717,024	\$403	-7%	391	18%	2,168	\$874,714
Other white	501	99	382	21			\$158,801	\$317	31%	100	17%	601	\$190,531
<b>White Total</b>	<b>180,490</b>	<b>53,039</b>	<b>126,174</b>	<b>1,277</b>			<b>\$61,141,900</b>	<b>\$339</b>	<b>8%</b>	<b>38,873</b>	<b>18%</b>	<b>219,363</b>	<b>\$74,527,296</b>
<b>Grand Total</b>	<b>371,189</b>	<b>53,231</b>	<b>179,078</b>	<b>138,880</b>			<b>\$175,110,805</b>	<b>\$472</b>	<b>21%</b>	<b>102,901</b>	<b>22%</b>	<b>474,090</b>	<b>\$226,649,406</b>

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

# Riverland

## Historical weighted average price vs tonnes crushed



# Riverland

## Current plantings by variety and year planted – white winegrapes

Variety	Year planted				Total area (ha)	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>White winegrapes</b>						
Chardonnay	4,360	3	0	19	4,383	0%
Chenin Blanc	74	0	0	0	74	0%
Colombard	762	0	0	0	762	0%
Doradillo	35	0	0	0	35	0%
Muscadelle (Tokay)	8	0	0	0	8	0%
Muscat A Petit Grains Blanc (White Frontignac)	114	0	0	0	114	0%
Muscat Gordo Blanco	891	2	2	0	895	0%
Palomino	8	0	0	0	8	0%
Pinot Gris	113	41	34	53	241	22%
Riesling	110	0	0	0	110	0%
Sauvignon Blanc	499	16	16	8	538	1%
Semillon	321	0	0	0	321	0%
Sultana	125	0	0	0	125	0%
Traminer (Gewurztraminer)	110	0	0	0	110	0%
Trebbiano	14	0	0	0	14	0%
Verdelho	88	0	0	0	88	0%
Vermentino	17	0	0	0	17	0%
Viognier	103	0	0	0	104	0%
Other White	60	1	0	0	61	0%
<b>TOTAL WHITE WINEGRAPES</b>	<b>7,812</b>	<b>63</b>	<b>52</b>	<b>80</b>	<b>8,008</b>	<b>1%</b>

Source: Vinehealth Australia

# Riverland

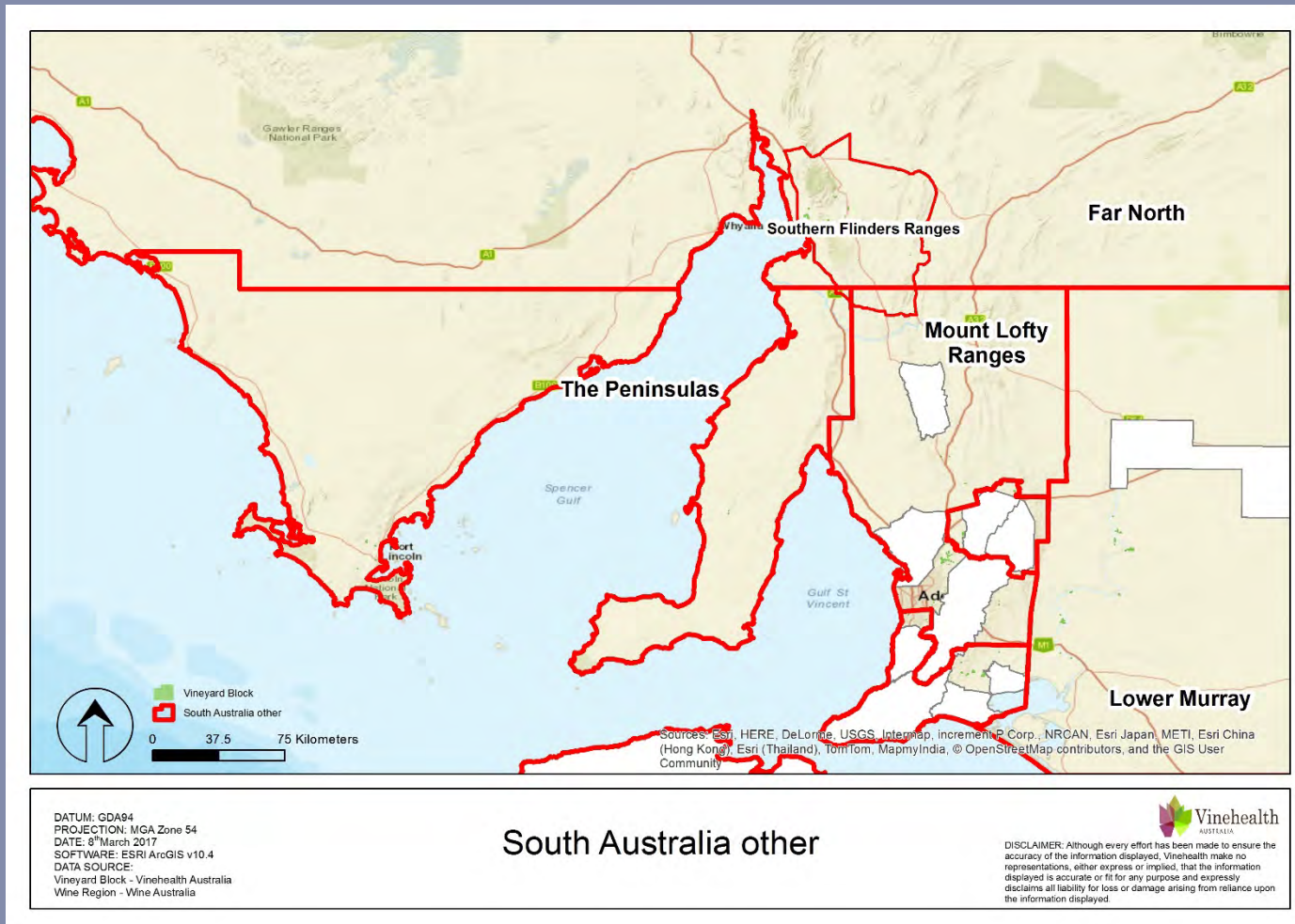
## Current plantings by variety and year planted – red winegrapes

Variety	Year planted				Total area (ha)	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>Red winegrapes</b>						
Cabernet Sauvignon	3,210	31	44	61	3,346	2%
Grenache	290	0	6	0	296	0%
Malbec	23	3	3	1	29	3%
Mataro (Mourvedre)	232	0	0	2	234	1%
Merlot	1,167	0	4	21	1,192	2%
Petit Verdot	495	0	2	0	497	0%
Pinot Noir	290	0	0	0	290	0%
Ruby Cabernet	119	0	0	0	119	0%
Sangiovese	14	0	4	0	18	0%
Shiraz	5,375	111	76	41	5,603	1%
Tempranillo	54	0	0	1	55	2%
Other Red	128	1	13	6	149	5%
<b>TOTAL RED WINEGRAPES</b>	<b>11,397</b>	<b>146</b>	<b>152</b>	<b>133</b>	<b>11,828</b>	<b>1%</b>
Unknown variety	228	20	81	0	329	0%
Rootstock Block	25	0	0	2	27	6%
Table grapes - red	18	0	0	0	18	0%
Table grapes - white	26	0	4	0	30	0%
Multi-purpose red	60	0	0	0	60	0%
Multi-purpose white	25	0	0	5	30	16%
<b>TOTAL ALL VARIETIES</b>	<b>19,627</b>	<b>229</b>	<b>289</b>	<b>220</b>	<b>20,366</b>	<b>1%</b>

Source: Vinehealth Australia

# SA Winegrape Crush Survey 2019 Regional Summary Report

## South Australia other



*Wine Australia July 2019*



# SA other

## Vintage overview

*South Australia other includes the GI region of Southern Flinders Ranges, The Peninsulas GI zone, and the vineyards in Mount Lofty Ranges zone and Lower Murray zone that are outside designated GI regions (see map on cover page). The total area of vines included in this definition is 997 hectares.*

### OVERVIEW OF VINTAGE STATISTICS

The harvest from South Australia other in 2019 was 10,814 tonnes, compared with 7,668 tonnes in 2018. Most of the increase came from Lower Murray zone – other, which was up by 58 per cent.

The five-year average crush for this group of regions is 5,317 tonnes, implying that 2019 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 may appear more significant on a percentage basis than a tonnage basis.

There were 24 respondents to the survey who reported crushing grapes from one or more of the regions in SA other in 2019, compared with 27 in 2018.

The total value of fruit from these vineyards in 2019 is estimated at nearly \$7 million, compared with \$5 million in 2018. The increased tonnage was offset by an overall decrease of 7 per cent in the average purchase value, although all of the major varieties increased in average price compared with last year. The largest variety, Chardonnay, was up by 18 per cent to \$380 per tonne, while Shiraz increased by 6 per cent to \$974 per tonne.

The price dispersion data shows that 91 per cent of reds were purchased at \$600 per tonne and above, compared with 56 per cent last year, while 97 per cent of white varieties were purchased at below \$600 per tonne.

There were no new plantings in Mount Lofty Ranges zone (other), Southern Flinders Ranges or The Peninsulas in spring 2018 – and just 2 hectares of Cabernet Sauvignon in Lower Murray zone (other). All these areas are dominated by Shiraz, which makes up 46 per cent of all plantings. The total area has declined from 1,100 hectares in 2013 to 997 hectares as at 30 April 2019.

# 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	1,287		113	1,087	46	41	\$1,048,601	\$815	1%	203	14%	1,490	\$1,214,348
Grenache	4			4							0%	4	\$5,044
Mataro/Mourvedre	15				15						0%	15	\$26,172
Merlot	602		44	558			\$386,971	\$643	48%		0%	602	\$386,971
Montepulciano	4					4					0%	4	\$8,440
Petit Verdot	16			11	6						0%	16	\$17,296
Sangiovese	61			50	11		\$78,195	\$1,283		10	14%	71	\$91,023
Shiraz	2,642		246	2,115	214	67	\$2,574,373	\$974	6%	648	20%	3,290	\$3,205,683
Other red	8			8							0%	8	\$6,045
Red Total	4,639		403	3,833	292	111	\$4,151,136	\$895	3%	861	16%	5,500	\$4,961,022
White													
Chardonnay	3,370		3,370				\$1,281,432	\$380	18%		0%	3,370	\$1,281,432
Colombard	1,183	209	973								0%	1,183	\$348,489
Moscato Giallo										5	100%	5	\$7,500
Muscat Gordo Blanco	143	143									0%	143	\$39,207
Pinot Gris/Grigio	289		215	74			\$157,091	\$544	9%		0%	289	\$157,091
Riesling	59		59								0%	59	\$20,169
Sauvignon Blanc	244		174	70			\$115,571	\$474			0%	244	\$115,571
Vermentino	20		20								0%	20	\$7,091
Viognier	1				1						0%	1	\$1,800
White Total	5,309	352	4,812	144	1		\$1,970,850	\$371	0%	5	0%	5,314	\$1,978,350
Grand Total	9,948	352	5,215	3,977	293	111	\$6,121,986	\$615	-7%	866	8%	10,814	\$6,939,372

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-2016	2016	2017	2018	Total area	% planted in 2018
<b>Red winegrapes</b>						
Cabernet Sauvignon	18	0	0	0	18	0%
Merlot	6	0	0	0	6	0%
Shiraz	122	0	0	0	122	0%
Other Red	0	0	0	0	0	0%
<b>TOTAL RED WINEGRAPES</b>	<b>146</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>146</b>	<b>0%</b>
Unknown variety	44	0	0	0	44	0%
<b>TOTAL ALL VARIETIES</b>	<b>190</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>190</b>	<b>0%</b>

### The Peninsulas

Variety	Pre-2016	2016	2017	2018	Total area	% planted in 2018
<b>Red winegrapes</b>						
Cabernet Sauvignon	9	0	0	0	9	0%
Shiraz	12	0	0	0	12	0%
Other Red	3	0	0	0	3	0%
<b>TOTAL RED WINEGRAPES</b>	<b>24</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>24</b>	<b>0%</b>
Unknown variety	43	0	0	0	43	0%
<b>TOTAL ALL VARIETIES</b>	<b>67</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>67</b>	<b>0%</b>

Source: Vinehealth Australia

# SA other

## Current plantings by variety and year planted – Lower Murray zone (other)

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	73	0	2	2	76	2%
Merlot	18	0	0	0	18	0%
Petit Verdot	16	0	0	0	16	0%
Shiraz	135	0	0	0	135	0%
Other Red	12	0	0	0	12	0%
TOTAL RED WINEGRAPES	254	0	2	2	257	1%
White winegrapes						
Chardonnay	82	0	0	0	82	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	10	0	0	0	10	0%
TOTAL WHITE WINEGRAPES	128	0	0	0	128	0%
Unknown variety	25	0	0	0	25	0%
TOTAL ALL VARIETIES	407	0	2	2	410	0%

Source: Vinehealth Australia

# SA other

Current plantings by variety and year planted – Mount Lofty Ranges zone (other)

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	73	0	0	0	73	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	2	0	0	189	0%
Other Red	22	0	0	0	22	0%
TOTAL RED WINEGRAPES	305	2	0	0	308	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 WINEGRAPES	18	0	0	0	18	0%
Unknown variety	4	0	0	0	4	0%
TOTAL ALL VARIETIES	327	2	0	0	330	0%

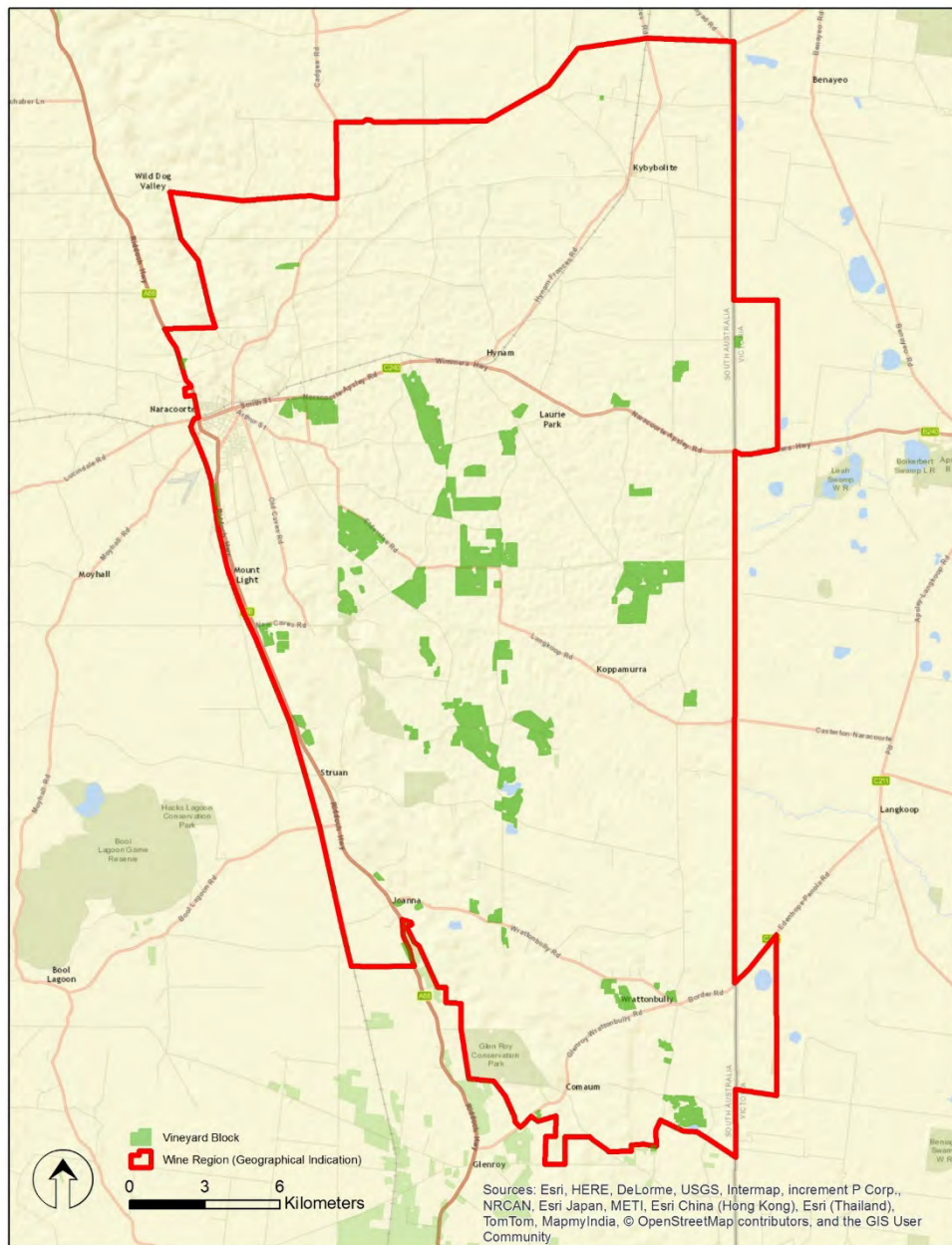
Source: Vinehealth Australia

# SA Winegrape Crush Survey 2019

## Regional Summary Report

### Wrattonbully Wine Region

*Wine Australia July 2019*



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

**Wrattonbully  
Wine Region**



**DISCLAIMER:** Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth make no representations, either express or implied, that the information displayed is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information displayed.

# Wrattonbully

## Vintage overview

### VINTAGE REPORT

2019 got off to a great start with exceptional 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 with ample soil moisture aiding in very solid early shoot growth. A mild spring, combined with good moisture levels, allowed for very good canopy growth and development right through to flowering.

With the milder conditions of spring, flowering was about in line with long term average (early December). There was a significant rain event during the flowering period which was beneficial to continuing vine canopy development. This did upset the flowering of Cabernet Sauvignon leading to a lower percentage of berry set than normal. The rain event also increased the disease pressure during this critical period in the vines' development, but with ample warning and the majority of growers in the district using preventive spray programs, very little disease was detected.

Mid-December through to the commencement of harvest in early March was extremely dry. This, combined with warm to hot conditions and no significant heatwaves, made for near perfect ripening conditions going into harvest. The whites' harvest commenced in early March and was completed by Mid-March, with yields being average to slightly above average. Harvesting of the red varieties commenced in the second week of April and was completed before ANZAC day. The majority of the district's red varieties were harvested in a frantic 2 to 3 week window.

The mild days and cool night temperatures in late February and early March aided in the final ripen of the whites, while the reds benefitted from the longer hang time allowed by the milder conditions. Cabernet Sauvignon again was the stand-out with the cooler, longer ripening aiding in the wines showing very varietal characters, high colour and strong but balanced tannins.

*Tim Fletcher, President, Wrattonbully Wine Region*

### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Wrattonbully in 2019 was 24,573 tonnes, 87 per cent higher than the 2018 crush of 13,160 tonnes and the second highest since the record crop of 28,451 tonnes in 2004.

There were 24 respondents to the survey who reported crushing grapes from Wrattonbully in 2019, compared with 20 in 2018.

The five-year average crush for Wrattonbully from 2014-2018 is 19,709 tonnes. The 2017 crush was the highest in the five year period while the smallest was the 2018 crush. The 2019 crush was 25 per cent above the five-year average.

The total value of grapes almost doubled from \$15.6 million in 2018 to \$30.2 million in 2019, with the higher tonnages enhanced by further increases in the average purchase value across all major varieties. Cabernet Sauvignon increased by 6 per cent to \$1465 per tonne, Shiraz increased by 10 per cent to \$1408 per tonne and Chardonnay increased by 10 per cent to \$792 per tonne.

The price dispersion data shows that there was an upward shift in prices, with 23 per cent of red tonnages purchased at \$1500 per tonne or above, whereas in 2018 there was 15 per cent purchased in this range. For the whites, there was also an upward shift, with 100 per cent purchased between \$600 and \$1500 per tonne compared with 81 per cent in this range and 9 per cent below \$600 per tonne in 2018.

There were just 4 hectares of new plantings in Wrattonbully in the 2018 planting season, less than the two previous years. All were minor varieties.

The total planted area in Wrattonbully as at 30 April 2019 was 2,678 hectares, almost identical to 2018 and only 9 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	\$4,700
Cabernet Sauvignon	2,821		27	2,198	481	116	\$4,132,754	\$1,465	6%	3,316	54%	6,137	\$8,990,121
Malbec	57			47	10		\$64,946	\$1,136		29	34%	87	\$98,345
Merlot	1,262			1,010	253		\$1,406,934	\$1,114	-5%	2,768	69%	4,030	\$4,491,620
Petit Verdot	6			6						37	86%	43	\$55,874
Pinot Noir	252			252			\$261,828	\$1,037		446	64%	699	\$724,414
Sangiovese										61	100%	61	\$79,579
Shiraz	3,661		106	2,607	608	340	\$5,155,666	\$1,408	10%	4,144	53%	7,806	\$10,991,510
Tempranillo	41			6	35					6	12%	46	\$71,430
Red Total	8,101		133	6,125	1,387	457	\$11,092,616	\$1,369	7%	10,810	57%	18,911	\$25,507,594
White													
Chardonnay	1,113			1,113			\$881,163	\$792	10%	1,256	53%	2,369	\$1,875,914
Gewurztraminer	7			7							0%	7	\$4,988
Pinot Gris/Grigio	128			128			\$115,091	\$902	-11%	1,964	94%	2,091	\$1,887,072
Prosecco	128			128							0%	128	\$85,116
Riesling										127	100%	127	\$154,422
Sauvignon Blanc	314			314						459	59%	773	\$516,055
Semillon										80	100%	80	\$76,037
Viognier										87	100%	87	\$113,691
White Total	1,689			1,689			\$1,295,947	\$767	1%	3,973	70%	5,662	\$4,713,294
Grand Total	9,790		133	7,814	1,387	457	\$12,388,564	\$1,265	7%	14,783	60%	24,573	\$30,220,888

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

# Wrattenbully

## Current plantings by variety and year planted

Variety	Pre-2016	2016	2017	2018	Total area	% planted in 2018
<b>Red winegrapes</b>						
Cabernet Sauvignon	1213	0	6	0	1220	0%
Malbec	6	2	0	2	9	16%
Merlot	278	2	0	0	280	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	695	4	8	0	707	0%
Tempranillo	9	0	0	0	9	0%
Other Red	13	0	0	0	13	0%
<b>TOTAL RED WINEGRAPES</b>	<b>2277</b>	<b>8</b>	<b>14</b>	<b>2</b>	<b>2301</b>	<b>0%</b>
<b>White winegrapes</b>						
Chardonnay	188	0	0	0	188	0%
Pinot Gris/Grigio	97	2	0	0	99	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	61	0	0	0	61	0%
Semillon	3	0	0	0	3	0%
Other White	11	0	0	2	13	15%
<b>TOTAL WHITE WINEGRAPES</b>	<b>367</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>371</b>	<b>1%</b>
Unknown variety	6	0	0	0	6	0%
<b>TOTAL ALL VARIETIES</b>	<b>2650</b>	<b>10</b>	<b>14</b>	<b>4</b>	<b>2678</b>	<b>0%</b>

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).

The survey publication is available on Wine Australia's website [wineaustralia.com](http://wineaustralia.com), the Vinehealth Australia website [vinehealth.com.au](http://vinehealth.com.au) and via links from the Wine Grape Council SA website [wgcsa.com.au](http://wgcsa.com.au) and the South Australian Wine Industry Association website [winesa.com.au](http://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:

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+618 8228 2000  
[Market.insights@wineaustralia.com](mailto: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 88 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

Variations in response rate can affect comparisons in the crush from year to year.

Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("winery grown") and from independent vineyards ("purchased").

### *Calculated average purchase value*

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – NOT including 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 2019).

The calculated average purchase value per tonne is the average amount paid per tonne of fruit across all wineries.

Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements.

Average and total purchase values are not reported where there are fewer than three purchasers of a variety in a particular region. However the values are included in the calculation of totals for each region.

### **Important note on average purchase value**

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts.

### *Price dispersion data (shaded columns in Intake Summary tables)*

All purchases for each variety are grouped into price segments according to the price paid for that batch of fruit. The sum of tonnes in all the price segments may not match the total tonnes purchased where there are tonnes reported without an associated price.

### *Estimated total value of all grapes*

The estimated total value of all grapes is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value for the same variety across similar regions, or across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

# Explanations and definitions - continued

## PLANTING DATA

### *Source of planting data tables*

Planting data is not collected by the Australian National Vintage Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia.

Vinehealth Australia is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of vineyard owners in the state. Vineyard owners with plantings of 0.5 hectares or more are required to register with Vinehealth Australia, and provide details of any changes made to these vineyard plantings within three months of any such change. This information is kept strictly confidential and provided for this survey in a deidentified and aggregated manner.

### **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 2019 and include all plantings from the 2018-19 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.
- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.

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.