

Prepared by:

Wine Australia

On behalf of:



SA Winegrape Crush Survey 2020

July 2020

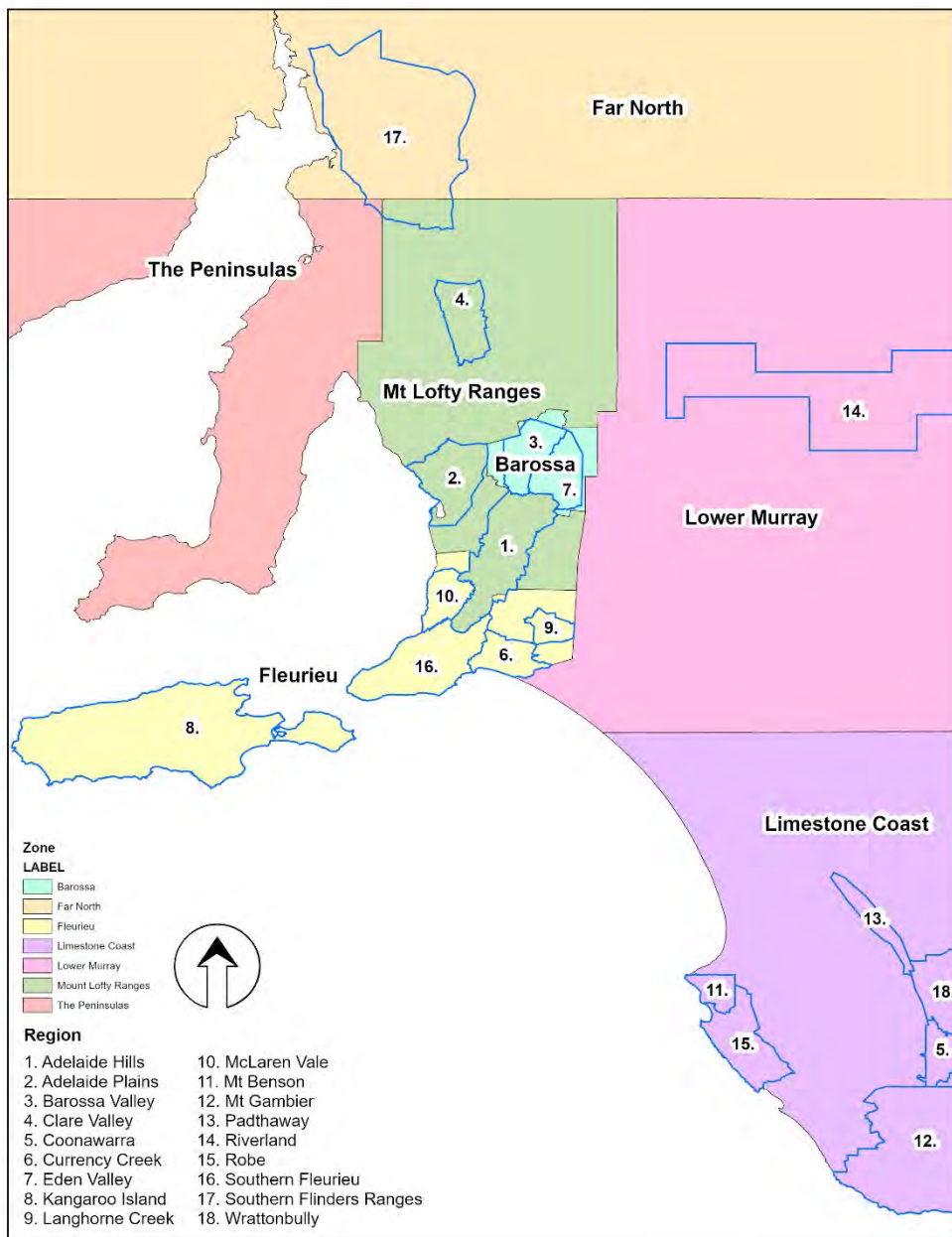
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SA Winegrape Crush Survey 2020

State Summary Report

Wine Australia July 2020



Geographical Indication Zones and Regions in South Australia



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SCALE: 1:2,500,000
DATUM: GDA2020
PROJECTION: Transverse Mercator
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Wine Regions - Wine Australia

State summary 2020

Overview of vintage statistics

State and regional overview

The total reported crush of South Australian winegrapes in 2020 was 651,195 tonnes. This was 15 per cent below the 2019 crush of 768,936 tonnes and 12 per cent below the 10-year average (2010-2019) of 736,537 tonnes.

While it was the smallest crush since 2007, it was only 4 per cent below the 2010, 2011 and 2013 vintages, which were all around 680,000 tonnes.

The top three regions by volume in 2020 were the Riverland with 461,385 tonnes, McLaren Vale with 28,571 tonnes and the Barossa Valley with 28,326 tonnes.

Most regions had a smaller crush in 2020, with regions in the Limestone Coast down by around 50 per cent, while the Barossa and Clare Valleys were down by 23 and 29 per cent respectively. McLaren Vale was down by a relatively small 13 per cent and became the second largest region by volume after the Riverland, reporting a larger crush than the Barossa Valley for the first time since 2004¹. The Riverland decreased by only 3 per cent and further increased its share of the state's production to 71 per cent by volume compared with 62 per cent in 2019. It also accounted for the largest share of the total value (46 per cent).

The total estimated value of the crush was \$557 million compared with \$630 million in 2019, with the decline in volume partly offset by an increase in the average value of grape purchases.

Weighted average prices increased for the top variety in all the major regions, with the biggest increases being for Barossa Shiraz and Clare Riesling (see page 12).

¹ Variations in response rates between years can account for some of the change in the reported crush.

Varietal overview

The red crush was 403,426 tonnes in 2020, with the two top varieties, Shiraz and Cabernet Sauvignon, making up 78 per cent of the total. The volume was down by 15 per cent compared with 2019. Declines were fairly consistent across the major varieties, with Shiraz and Cabernet Sauvignon both down by 15 per cent and Merlot declining by the most (23 per cent). Petit Verdot defied the general trend to increase by 9 per cent.

In the whites, the overall decline was also 15 per cent but Chardonnay (down 20 per cent) and Muscat Gordo Blanco (down 17 per cent) decreased by more than the average, while Sauvignon Blanc and Pinot Gris/Grigio were less affected (both down 2 per cent). Semillon increased by 3 per cent. Colombard decreased by 11 per cent and overtook Muscat Gordo Blanco to be the third largest variety. The top four accounted for 80 per cent of the total white volume.

Vineyard plantings

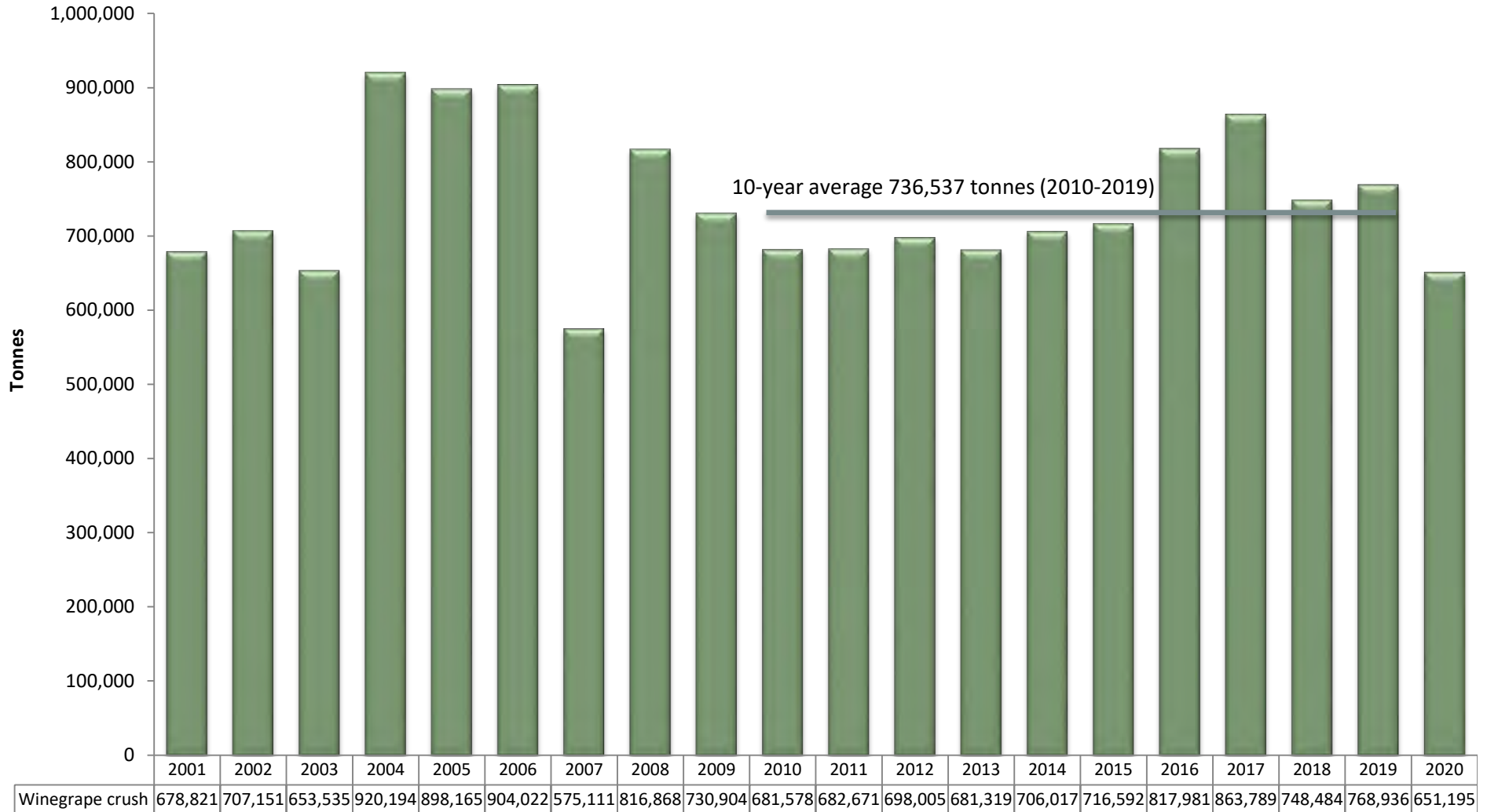
Planting data derived from the Vinehealth Australia vineyard register shows that there were 76,008 hectares planted to vines in South Australia as at 30 April 2020. This represents a net increase of 520 hectares in the last 12 months.

There are indications of a continued increase in new plantings, with a total of 996 hectares planted in spring 2019 (including top-working and replacements) compared with 1,021 hectares in spring 2018. Cabernet Sauvignon was the most planted red variety by area and Fiano the most planted white variety by area. Over 87 per cent of new plantings were Shiraz and Cabernet Sauvignon. The largest area of new plantings in the state was in the Coonawarra wine region.

There were 3,271 vineyard owners registered with Vinehealth Australia as at 30 April 2020. This was 25 fewer than at the same time last year.

State summary 2020

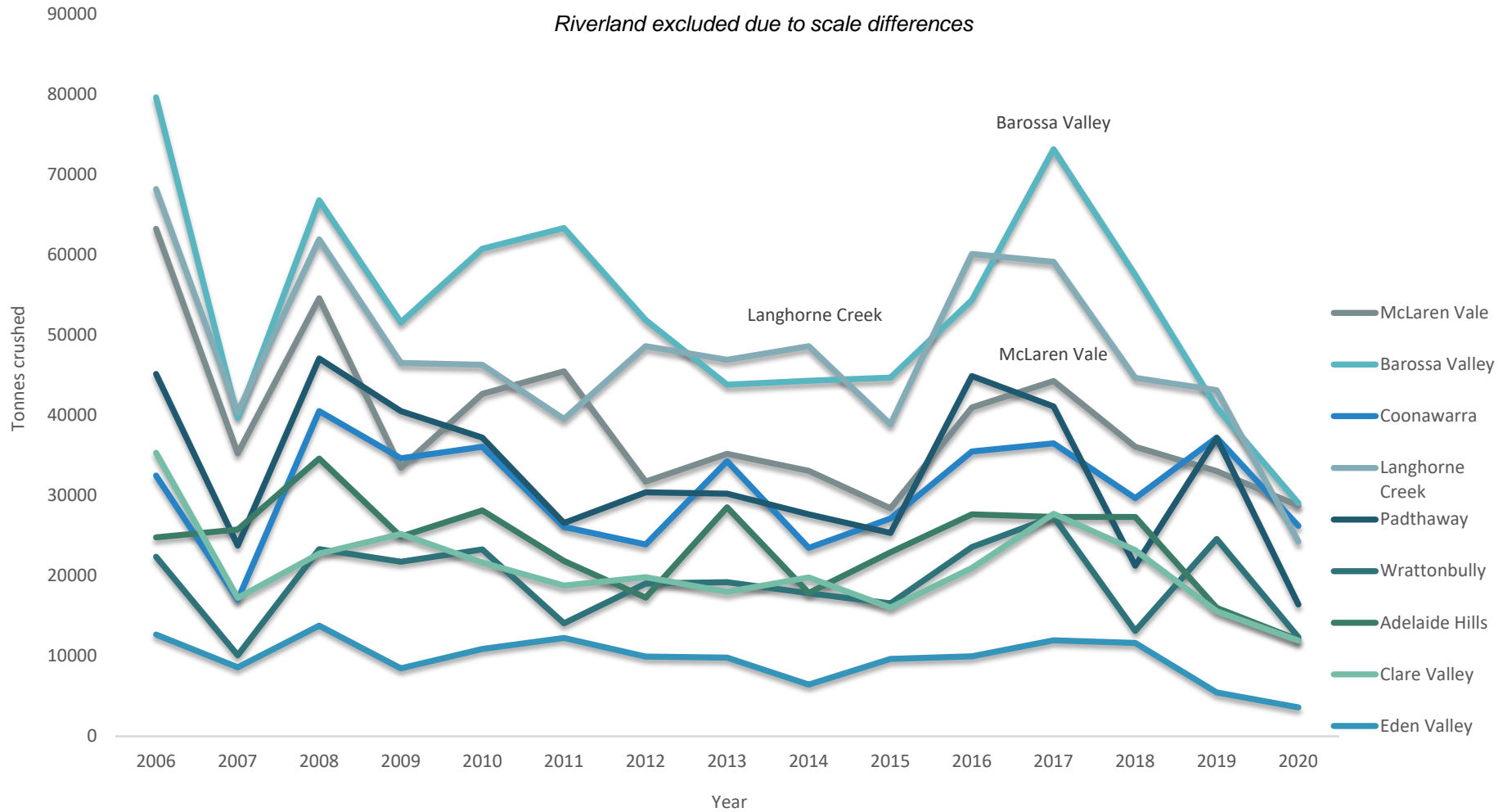
Historical winegrape crush South Australia 2001 - 2020



State summary 2020

Vintage by region 2006 - 2020

Riverland excluded due to scale differences



State summary 2020

Total crush by GI region 2020 vs 2019

GI Region	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2020	Region share of state	Total crush 2019	% change
Adelaide Hills	3,417	8,632	12,049	1.9%	16,021	-25%
Adelaide Plains	4	2,121	2,125	0.3%	2,964	-28%
Barossa Valley	10,820	17,506	28,326	4.3%	40,169	-29%
Barossa zone other	743		743	0.1%	818	-9%
Clare Valley	6,056	5,890	11,946	1.8%	15,583	-23%
Coonawarra	18,076	8,165	26,240	4.0%	37,242	-30%
Currency Creek	1,668	1,521	3,189	0.5%	3,139	2%
Eden Valley	1,799	1,825	3,624	0.6%	5,477	-34%
Fleurieu zone other	134	2,033	2,167	0.3%	2,543	-15%
Kangaroo Island	126	19	145	0.0%	64	125%
Langhorne Creek	6,508	17,778	24,286	3.7%	43,137	-44%
Limestone Coast zone other	4,877	2,252	7,129	1.1%	15,447	-54%
Lower Murray zone other	90	4,027	4,117	0.6%	8,540	-52%
McLaren Vale	10,568	18,183	28,751	4.4%	33,055	-13%
Mount Benson	872	1,389	2,260	0.3%	2,889	-22%
Mount Gambier	258	391	649	0.1%	889	-27%
Mount Lofty Ranges zone other	29	575	604	0.1%	1,017	-41%
Padthaway	5,324	11,104	16,428	2.5%	37,215	-56%
Riverland	117,299	344,087	461,385	70.9%	474,090	-3%
Robe	1,168	189	1,356	0.2%	1,937	-30%
Southern Fleurieu	7	601	608	0.1%	845	-28%
Southern Flinders Ranges	241	375	615	0.1%	1,102	-44%
The Peninsulas	5	75	79	0.0%	155	-49%
Wrattonbully	7,483	4,889	12,372	1.9%	24,601	-50%
Total all regions	197,571	453,624	651,195	100%	768,936	-15%

State summary 2020

Vintage summary by GI region 2020

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2020	Est value of purchased grapes	Est value of all grapes
Adelaide Hills	Red	982	3,148	4,131	\$5,713,069	\$7,580,080
	White	2,435	5,484	7,918	\$8,320,200	\$11,941,245
	Total	3,417	8,632	12,049	\$14,033,486	\$19,521,325
Adelaide Plains	Red	4	1,579	1,583	\$1,718,584	\$1,722,834
	White	-	542	542	\$573,280	\$573,280
	Total	4	2,121	2,125	\$2,291,864	\$2,296,114
Barossa Valley inc Barossa Zone other	Red	10,852	15,004	25,856	\$36,785,398	\$63,986,826
	White	712	2,502	3,214	\$2,218,255	\$2,914,295
	Total	11,563	17,506	29,069	\$39,003,653	\$66,901,120
Clare Valley	Red	3,634	2,721	6,355	\$4,897,695	\$11,429,354
	White	2,421	3,169	5,591	\$4,301,350	\$7,579,910
	Total	6,056	5,890	11,946	\$9,199,045	\$19,009,264
Coonawarra	Red	15,910	7,533	23,443	\$13,482,057	\$41,192,291
	White	2,165	632	2,797	\$582,299	\$2,701,501
	Total	18,076	8,165	26,240	\$14,064,356	\$43,893,792
Currency Creek	Red	1,353	1,332	2,685	\$1,773,029	\$3,444,483
	White	316	189	504	\$172,248	\$409,043
	Total	1,668	1,521	3,189	\$1,945,276	\$3,853,526
Eden Valley	Red	596	866	1,462	\$2,384,576	\$4,003,881
	White	1,203	960	2,162	\$1,533,927	\$3,570,446
	Total	1,799	1,825	3,624	\$3,918,502	\$7,574,327
Fleurieu zone - other inc Southern Fleurieu and Kangaroo Island	Red	144	1,309	1,453	\$1,705,153	\$1,896,648
	White	122	1,345	1,467	\$1,163,747	\$1,279,113
	Total	266	2,653	2,920	\$2,868,846	\$3,175,761

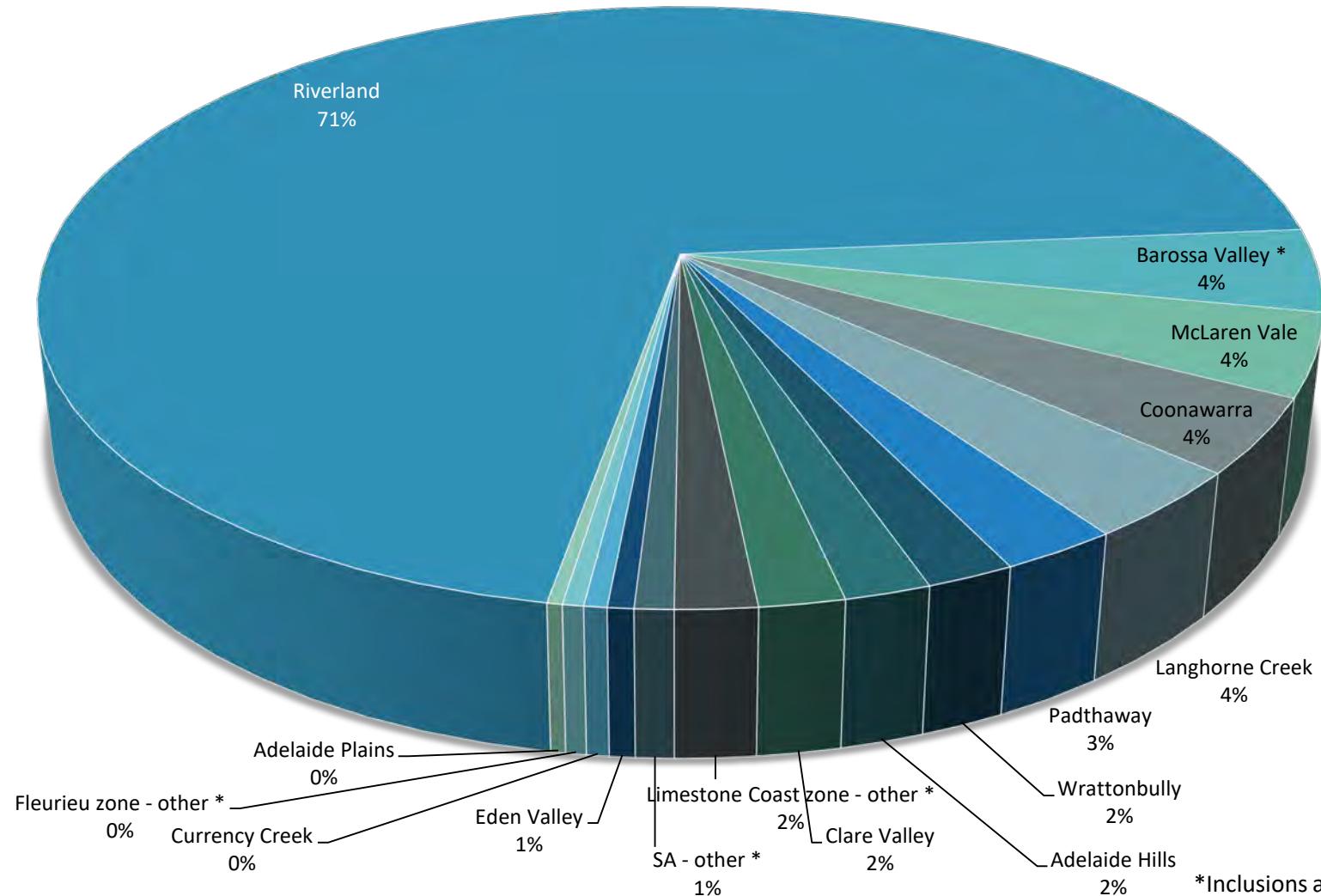
State summary 2020

Vintage summary by GI region 2020

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2020	Est value of purchased grapes	Est value of all grapes
Langhorne Creek	Red	5,091	15,352	20,443	\$18,484,617	\$24,390,646
	White	1,417	2,426	3,844	\$1,732,795	\$2,869,704
	Total	6,508	17,778	24,286	\$20,217,368	\$27,260,350
Limestone Coast zone - other inc Robe, Mt Benson and Mt Gambier	Red	5,490	3,233	8,723	\$3,917,645	\$10,528,190
	White	1,685	986	2,671	\$1,020,736	\$2,622,523
	Total	7,174	4,220	11,394	\$4,938,381	\$13,150,713
McLaren Vale	Red	9,918	16,522	26,440	\$33,609,519	\$53,706,218
	White	650	1,660	2,311	\$1,868,702	\$2,747,774
	Total	10,568	18,183	28,751	\$35,474,904	\$56,453,992
Padthaway	Red	3,409	5,555	8,964	\$7,333,026	\$11,790,615
	White	1,915	5,549	7,465	\$4,474,305	\$5,929,538
	Total	5,324	11,104	16,428	\$11,807,331	\$17,720,153
Riverland	Red	74,668	184,868	259,536	\$126,627,420	\$177,095,063
	White	42,631	159,219	201,850	\$61,304,740	\$77,831,411
	Total	117,299	344,087	461,385	\$187,932,160	\$254,926,475
Wrattonbully	Red	5,161	3,416	8,577	\$5,171,831	\$12,930,776
	White	2,322	1,473	3,795	\$1,570,411	\$4,176,554
	Total	7,483	4,889	12,372	\$6,742,242	\$17,107,330
SA - other inc The Peninsulas and Southern Flinders Ranges	Red	315	3,463	3,778	\$3,016,114	\$3,306,725
	White	46	1,588	1,634	\$666,292	\$691,146
	Total	361	5,051	5,412	\$3,682,406	\$3,997,871
All winegrapes	Total	197,571	453,624	651,195	\$358,121,419	\$556,842,113

State summary 2020

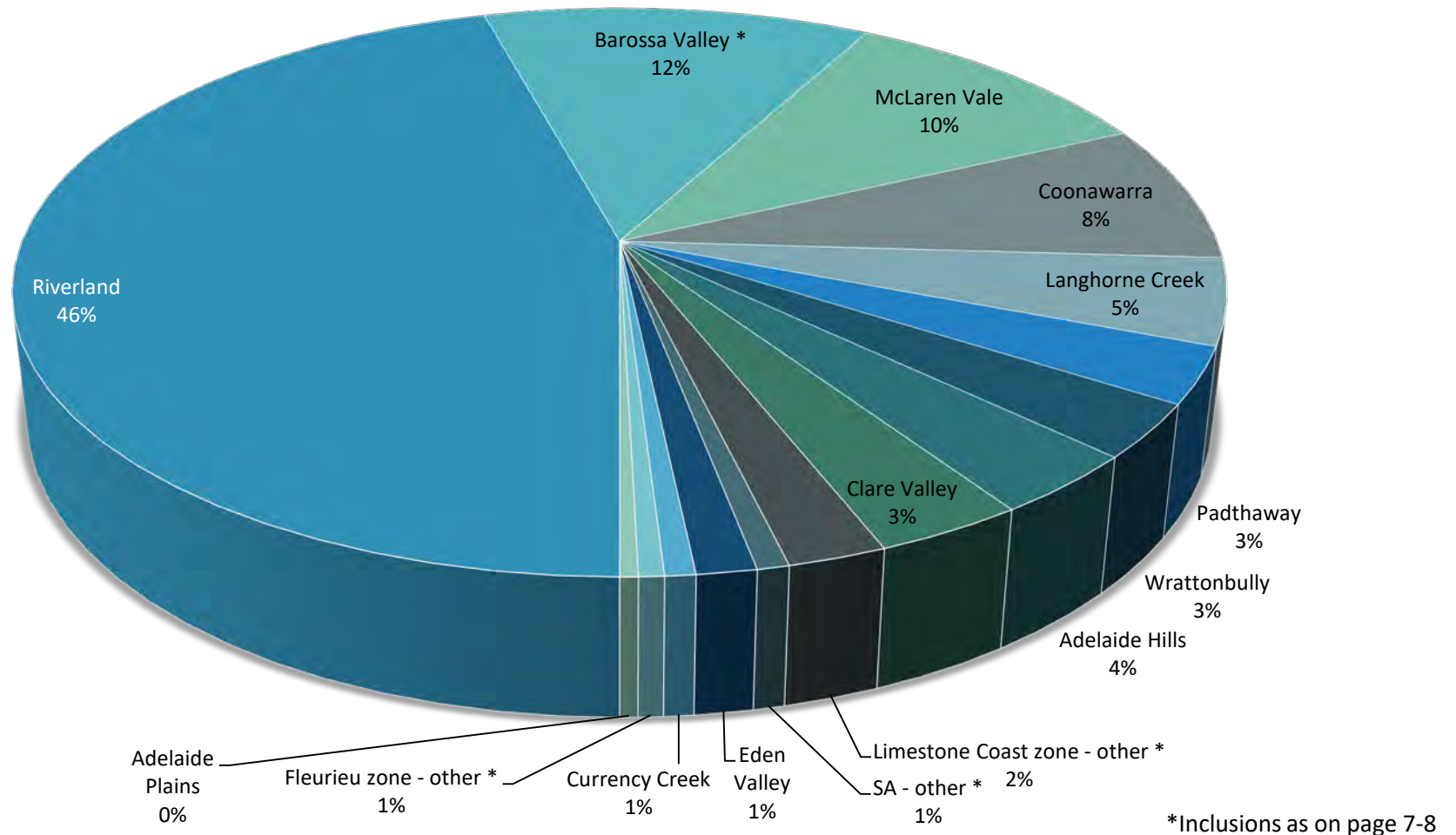
Share of crush volume by region 2020



*Inclusions as on page 7-8

State summary 2020

Share of crush value by region 2020

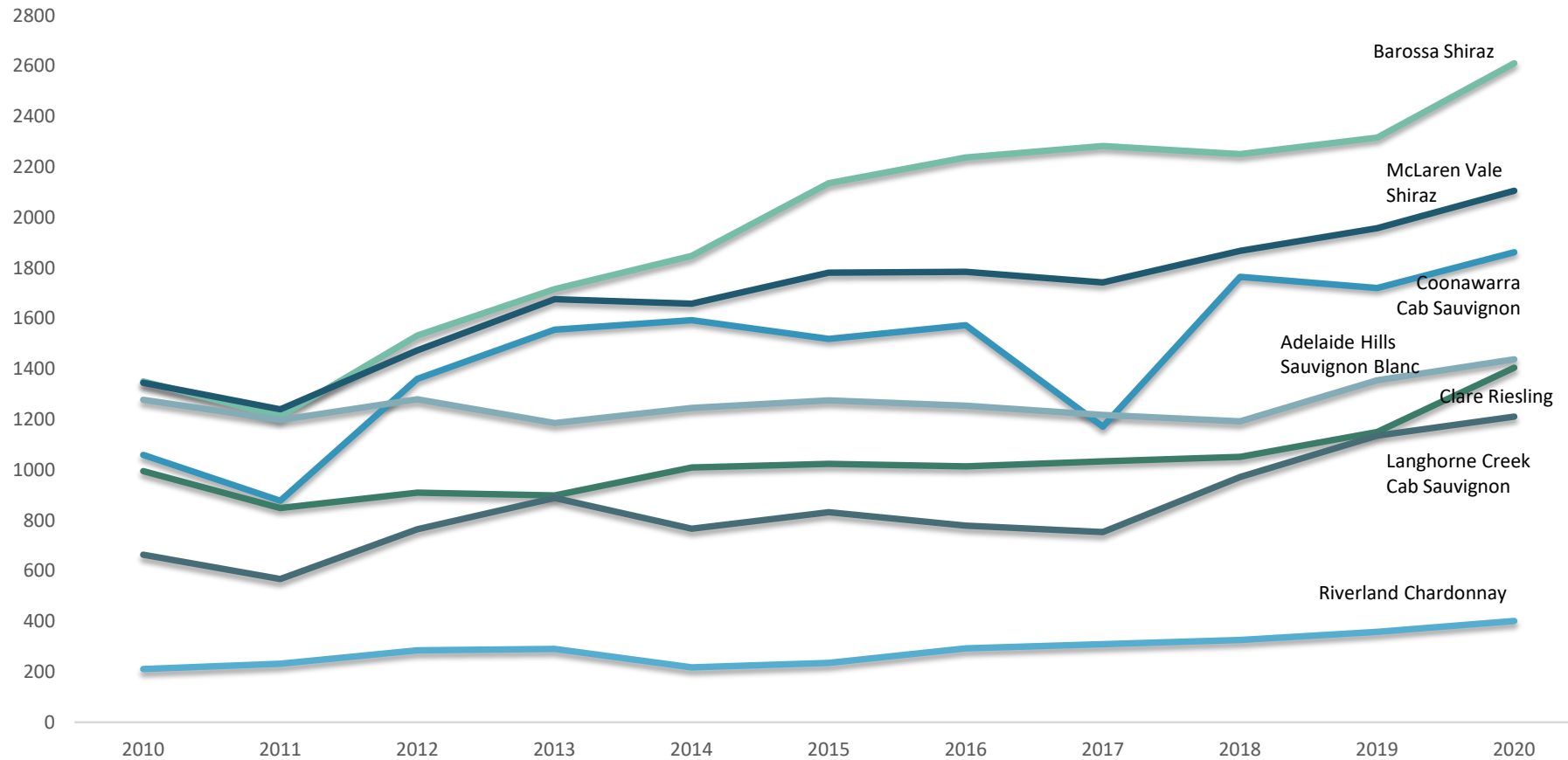


State summary 2020

Historical weighted average prices – 2010 - 2020

Major variety-region combinations

Average price (\$ per tonne)

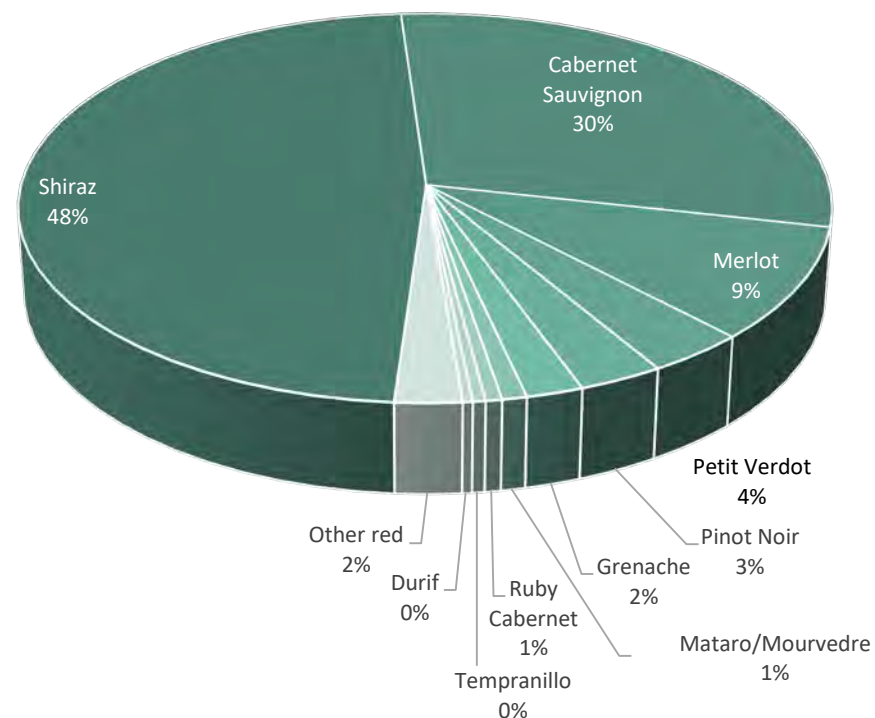


State summary 2020

Vintage summary by variety 2020 – red winegrapes

Variety	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2020	Purchased as share of total
Red				
Barbera	17	38	56	69%
Cabernet Franc	170	120	290	41%
Cabernet Sauvignon	41,188	78,077	119,265	65%
Durif	605	810	1,414	57%
Graciano	38	48	87	56%
Grenache	1,879	6,320	8,199	77%
Lagrein	21	29	50	59%
Malbec	718	617	1,335	46%
Mataro/Mourvedre	720	2,827	3,547	80%
Merlot	15,831	22,168	37,999	58%
Montepulciano	66	137	203	67%
Muscat a petits grains rouges	1	236	237	100%
Nebbiolo	52	30	82	36%
Nero d'Avola	23	22	45	48%
Petit Verdot	7,274	7,044	14,319	49%
Pinot Meunier	2	94	96	97%
Pinot Noir	2,208	9,975	12,183	82%
Ruby Cabernet	1,270	1,067	2,337	46%
Sangiovese	682	554	1,236	45%
Shiraz	60,079	132,669	192,748	69%
Tempranillo	633	1,180	1,813	65%
Touriga Nacional	205	67	271	25%
Other red	3,846	1,769	5,614	32%
Red Total	137,526	265,900	403,426	66%

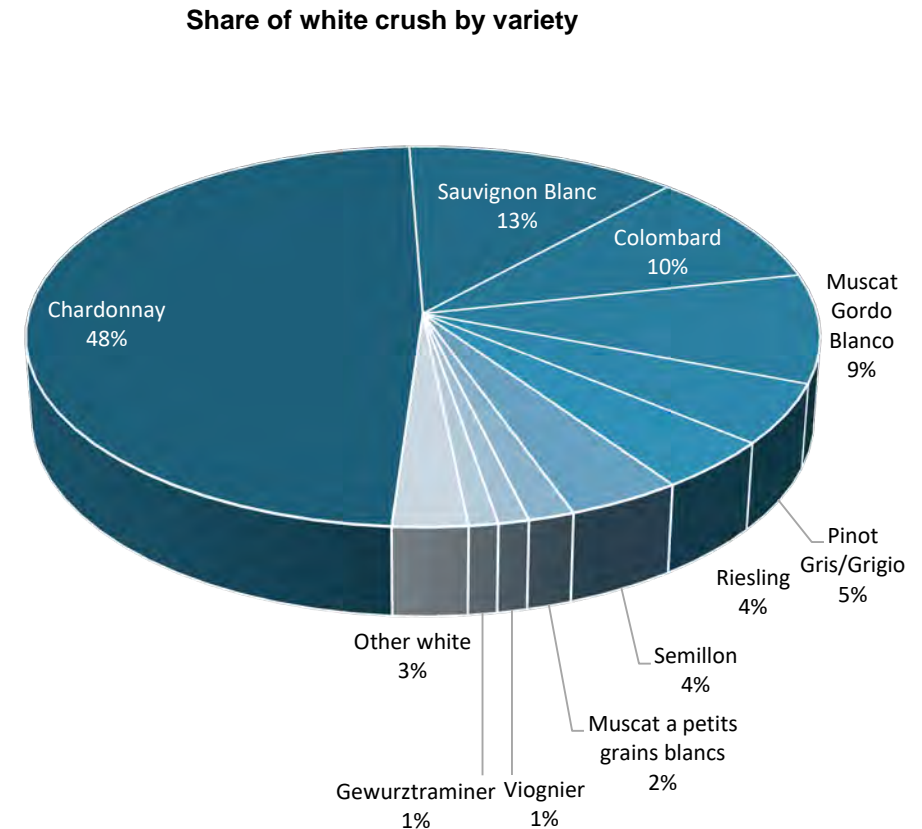
Share of red crush by variety



State summary 2020

Vintage summary by variety 2020 – white winegrapes

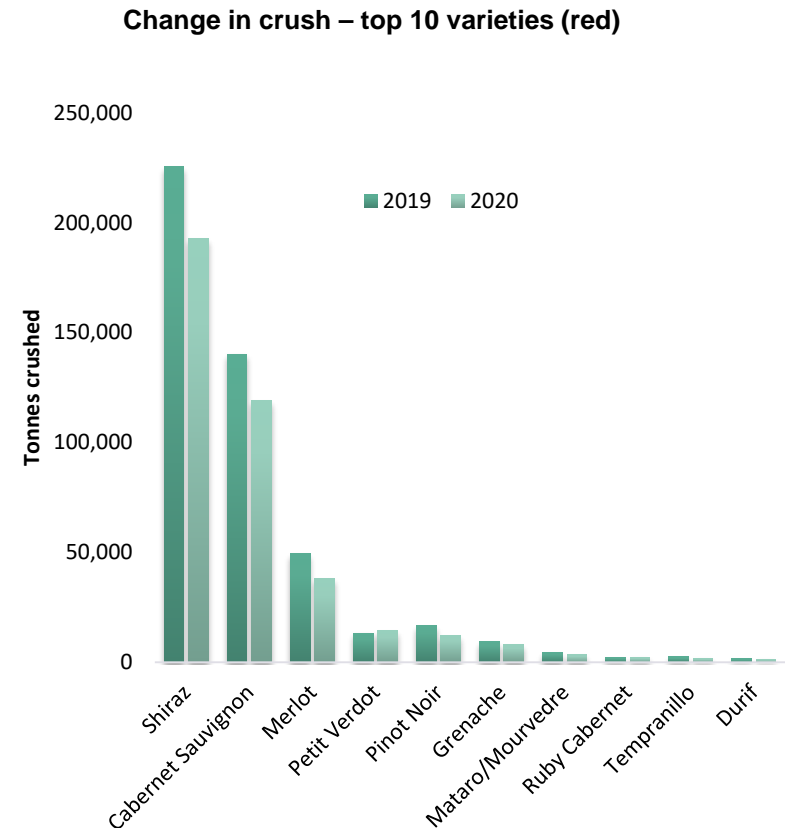
Variety	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2020	Purchased as share of total
White				
Chardonnay	25,800	93,806	119,606	78%
Chenin blanc	8	1,463	1,471	99%
Colombard	3,601	20,673	24,275	85%
Fiano	97	222	318	70%
Gewurztraminer	1,553	1,095	2,648	41%
Gruner Veltliner	179	73	252	29%
Marsanne	27	37	63	58%
Muscat a petits grains blancs	673	3,488	4,161	84%
Muscat Gordo Blanco	3,688	19,207	22,894	84%
Pinot Gris/Grigio	3,610	9,165	12,775	72%
Prosecco	19	240	259	93%
Riesling	4,639	6,118	10,757	57%
Roussanne	33	31	64	48%
Sauvignon Blanc	8,335	22,466	30,801	73%
Semillon	5,349	4,948	10,297	48%
Verdelho	922	949	1,872	51%
Vermentino	222	557	779	72%
Viognier	755	2,010	2,765	73%
Other white	535	1,176	1,711	69%
White Total	60,044	187,724	247,769	76%
Grand Total	197,571	453,624	651,195	70%



State summary 2020

Year-on-year comparison by variety 2019 vs 2020 – red winegrapes

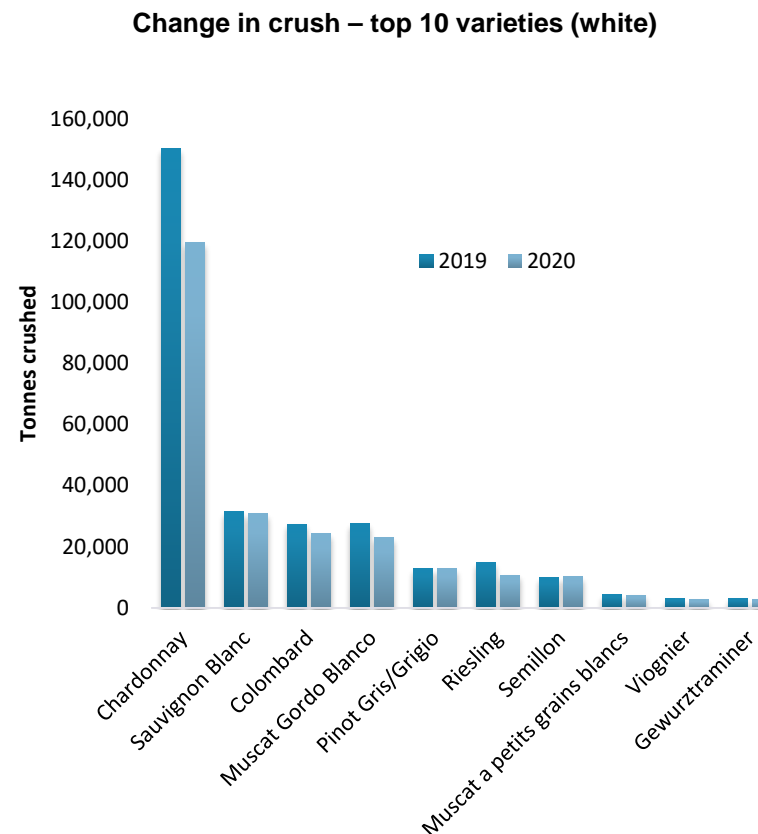
	2019	2020	% change
Red			
Shiraz	225,520	192,748	-15%
Cabernet Sauvignon	140,262	119,265	-15%
Merlot	49,404	37,999	-23%
Petit Verdot	13,188	14,319	9%
Pinot Noir	16,520	12,183	-26%
Grenache	9,400	8,199	-13%
Mataro/Mourvedre	4,516	3,547	-21%
Ruby Cabernet	2,301	2,337	2%
Tempranillo	2,493	1,813	-27%
Durif	1,619	1,414	-13%
Other red	3,319	5,614	69%
Malbec	3,293	1,335	-59%
Sangiovese	1,618	1,236	-24%
Cabernet Franc	759	290	-62%
Touriga Nacional	283	271	-4%
Muscat a petits grains rouges	299	237	-21%
Montepulciano	299	203	-32%
Pinot Meunier	229	96	-58%
Graciano	87	87	0%
Nebbiolo	97	82	-16%
Barbera	63	56	-11%
Lagrein	88	50	-43%
Nero d'Avola	122	45	-63%
Red Total	475,779	403,426	-15%



State summary 2020

Year-on-year comparison by variety 2019 vs 2020 – white winegrapes

	2019	2020	% change
White			
Chardonnay	150,350	119,606	-20%
Sauvignon Blanc	31,362	30,801	-2%
Colombard	27,382	24,275	-11%
Muscat Gordo Blanco	27,643	22,894	-17%
Pinot Gris/Grigio	13,005	12,775	-2%
Riesling	14,882	10,757	-28%
Semillon	10,032	10,297	3%
Muscat a petits grains blancs	4,486	4,161	-7%
Viognier	3,040	2,765	-9%
Gewurztraminer	3,163	2,648	-16%
Verdelho	2,247	1,872	-17%
Other white	1,753	1,711	-2%
Chenin blanc	1,693	1,471	-13%
Vermentino	1,055	779	-26%
Fiano	322	318	-1%
Prosecco	355	259	-27%
Gruner Veltliner	216	252	17%
Roussanne	65	64	-2%
Marsanne	108	63	-41%
White Total	293,158	247,769	-15%
Grand Total	768,936	651,195	-15%



State summary 2020

Current plantings by variety and year planted – red winegrapes

Variety	Year planted					
	Pre-2017	2017	2018	2019	Total area	% planted in 2019
Red winegrapes						
Aglianico	9	2	2	1	14	7%
Alicante Bouchet	18	0	0	0	18	0%
Barbera	32	0	0	0	32	0%
Cabernet Franc	154	4	0	6	164	4%
Cabernet Sauvignon	17,087	245	295	475	18,102	3%
Carignan	16	1	1	0	18	0%
Cinsault	7	0	2	0	9	0%
Dolcetto	20	0	0	0	20	0%
Durif (Petite Sirah)	67	15	4	1	87	1%
Graciano	18	1	0	0	19	0%
Grenache	1,565	16	10	24	1,615	1%
Lagrein	20	1	0	0	21	0%
Malbec	375	12	4	5	396	1%
Mataro (Mourvedre)	704	19	9	3	735	0%
Merlot	3,704	7	21	10	3,742	0%
Meunier (Pinot Meunier)	35	0	0	0	35	0%
Montepulciano	51	6	4	2	63	3%
Muscat A Petit Grains Rouge	6	0	0	0	6	0%
Nebbiolo	32	0	2	1	35	3%
Nero D'Avola	33	1	1	2	37	5%
Petit Verdot	685	3	0	0	688	0%
Pinot Noir	1,544	10	18	17	1,589	1%
Ruby Cabernet	128	0	0	0	128	0%
Sagrantino	12	0	0	0	12	0%
Sangiovese	170	5	2	4	181	2%
Saperavi	11	1	0	0	12	0%
Shiraz	26,964	383	405	394	28,146	1%
Tannat	8	0	0	0	8	0%
Tempranillo	326	9	1	0	336	0%
Touriga	45	4	2	0	51	0%
Zinfandel	30	0	0	0	30	0%
Other Red	133	4	7	6	150	4%
Total red varieties	54,009	749	790	951	56,499	2%

Source:
Vinehealth
Australia

State summary 2020

Current plantings by variety and year planted – white winegrapes and other grapes

Variety	Year planted				2019 Total area	% planted in 2019
	Pre-2017	2017	2018	2019		
White winegrapes						
Arneis	14	0	0	0	14	0%
Chardonnay	8,371	13	33	7	8,424	0%
Chenin Blanc	104	0	0	0	104	0%
Colombard	768	0	0	0	768	0%
Doradillo	36	0	0	0	36	0%
Fiano	75	1	3	12	91	13%
Gruner Veltliner	22	2	0	0	24	0%
Marsanne	21	0	1	0	22	0%
Muscadelle (Tokay)	22	0	0	0	22	0%
Muscat A Petit Grains Blanc (White Frontignac)	181	0	0	0	181	0%
Muscat Gordo Blanco	882	2	0	0	884	0%
Palomino	25	0	0	0	25	0%
Pedro Ximenez	13	0	0	0	13	0%
Pinot Gris	1,042	47	53	7	1,149	1%
Prosecco	22	3	4	0	29	0%
Riesling	2,294	13	6	8	2,321	0%
Roussanne	20	0	1	0	21	0%
Sauvignon Blanc	2,272	27	10	8	2,317	0%
Savagnin	30	0	0	1	31	3%
Semillon	786	0	0	0	786	0%
Sultana	124	0	0	0	124	0%
Traminer (Gewurztraminer)	224	0	0	0	224	0%
Trebbiano	14	0	0	0	14	0%
Verdelho	141	0	0	0	141	0%
Vermentino	45	0	0	0	45	0%
Viognier	319	0	0	0	319	0%
Other White	80	4	4	2	90	2%
Total white varieties	17,947	112	115	45	18,219	0%
Multi-purpose red	62	0	0	0	62	0%
Multi-purpose white	29	0	5	0	34	0%
Rootstock	37	0	2	0	39	0%
Table grapes - red	20	0	0	0	20	0%
Table grapes - white	27	4	16	0	47	0%
Unknown variety	914	81	93	0	1,088	0%
Total all varieties	73,045	946	1,021	996	76,008	1%

Source:
Vinehealth
Australia

State summary 2020

Current plantings by region and year planted

Zone	Region	Year planted				Total area (ha)	% planted in 2019
		Pre-2017	2017	2018	2019		
Barossa	Barossa Valley	11,085	221	171	86	11,563	1%
	Barossa zone - other	238	0	0	0	238	0%
	Eden Valley	2,230	29	38	82	2,379	3%
	Total for Barossa	13,553	250	209	168	14,180	1%
Far North	Southern Flinders Ranges	181	0	0	7	188	4%
	Total for Far North	181	0	0	7	188	4%
Fleurieu	Currency Creek	991	0	0	0	991	0%
	Fleurieu zone - other	232	0	4	0	236	0%
	Kangaroo Island	145	6	0	0	151	0%
	Langhorne Creek	5,799	18	79	28	5,924	0%
	McLaren Vale	7,105	111	78	55	7,349	1%
	Southern Fleurieu	453	8	14	8	483	2%
	Total for Fleurieu	14,725	143	175	91	15,134	1%
Limestone Coast	Bordertown	1,252	0	0	0	1,252	0%
	Coonawarra	5,586	18	27	215	5,846	4%
	Limestone Coast zone - other	590	0	0	0	590	0%
	Mount Benson	496	0	7	0	503	0%
	Mount Gambier	251	0	0	0	251	0%
	Padthaway	3,691	99	93	76	3,959	2%
	Robe	647	0	39	27	713	4%
	Wrattonbully	2,588	17	13	114	2,732	4%
	Total for Limestone Coast	15,101	134	179	432	15,846	3%
Lower Murray	Lower Murray zone - other	394	2	2	12	410	3%
	Riverland	19,722	297	354	202	20,575	1%
	Total for Lower Murray	20,116	299	356	214	20,985	1%
Mount Lofty Ranges	Adelaide Hills	3,622	64	56	18	3,760	0%
	Adelaide Plains	443	0	0	0	443	0%
	Clare Valley	4,896	55	43	56	5,050	1%
	Mount Lofty Ranges zone - other	344	0	3	6	353	2%
	Total for Mount Lofty Ranges	9,305	119	102	80	9,606	1%
The Peninsulas	The Peninsulas	67	0	0	3	70	4%
	Total for The Peninsulas	67	0	0	3	70	4%
	Total for all GIs	73,045	946	1,021	996	76,008	1%

Source:
Vinehealth
Australia

State summary 2020

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	1,364	337	2,349	146	2,339	69	1,420	22	4,092	16	11,563	590
	Barossa zone - other	17	3	12	1			84	1	126	1	238	6
	Eden Valley	393	91	522	35	350	11	365	5	750	3	2,379	145
Far North	Southern Flinders Ranges	17	6	120	7			51	1			188	14
Fleurieu	Currency Creek	59	11	161	11	154	4	65	1	551	2	991	29
	Fleurieu zone - other	23	8	43	3			170	2			236	13
	Kangaroo Island	113	20	38	3							151	23
	Langhorne Creek	104	22	313	20	819	24	1,178	17	3,510	12	5,924	95
	McLaren Vale	1,534	359	1,721	110	1,374	42	1,119	15	1,601	6	7,349	532
	Southern Fleurieu	109	32	55	5	227	6	92	1			483	44
Limestone Coast	Bordertown					39	1			1,214	4	1,252	5
	Coonawarra	274	47	479	30	633	18	1,006	15	3,454	9	5,846	119
	Limestone Coast zone - 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	16	22	2	80	2	98	1			251	21
	Padthaway	10	2	66	5	347	9	592	8	2,945	13	3,959	37
	Robe	18	2	41	2	81	2	54	1	519	3	713	10
	Wrattonbully	84	14	245	14	524	13	458	6	1,420	5	2,732	52
Lower Murray	Lower Murray zone - other	47	13	202	11	161	5					410	29
	Riverland	2,511	520	4,195	266	2,792	80	2,644	37	8,433	33	20,575	936
Mount Lofty Ranges	Adelaide Hills	727	191	911	54	1,009	30	841	12	272	2	3,760	289
	Adelaide Plains	124	41	76	6	168	4	76	1			443	52
	Clare Valley	615	170	732	44	788	22	743	10	2,172	12	5,050	258
	Mount Lofty Ranges zone - other	91	27	60	4	104	3	97	1			353	35
The Peninsulas	The Peninsulas	16	4	21	2	33	1					70	7
Totals by size category	Total	8,372	1,952	12,536	790	12,109	349	11,562	163	31,430	124		
Total for SA	Grand Total for state of SA											76,008	3,271

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 as the grand total only counts each owner once.

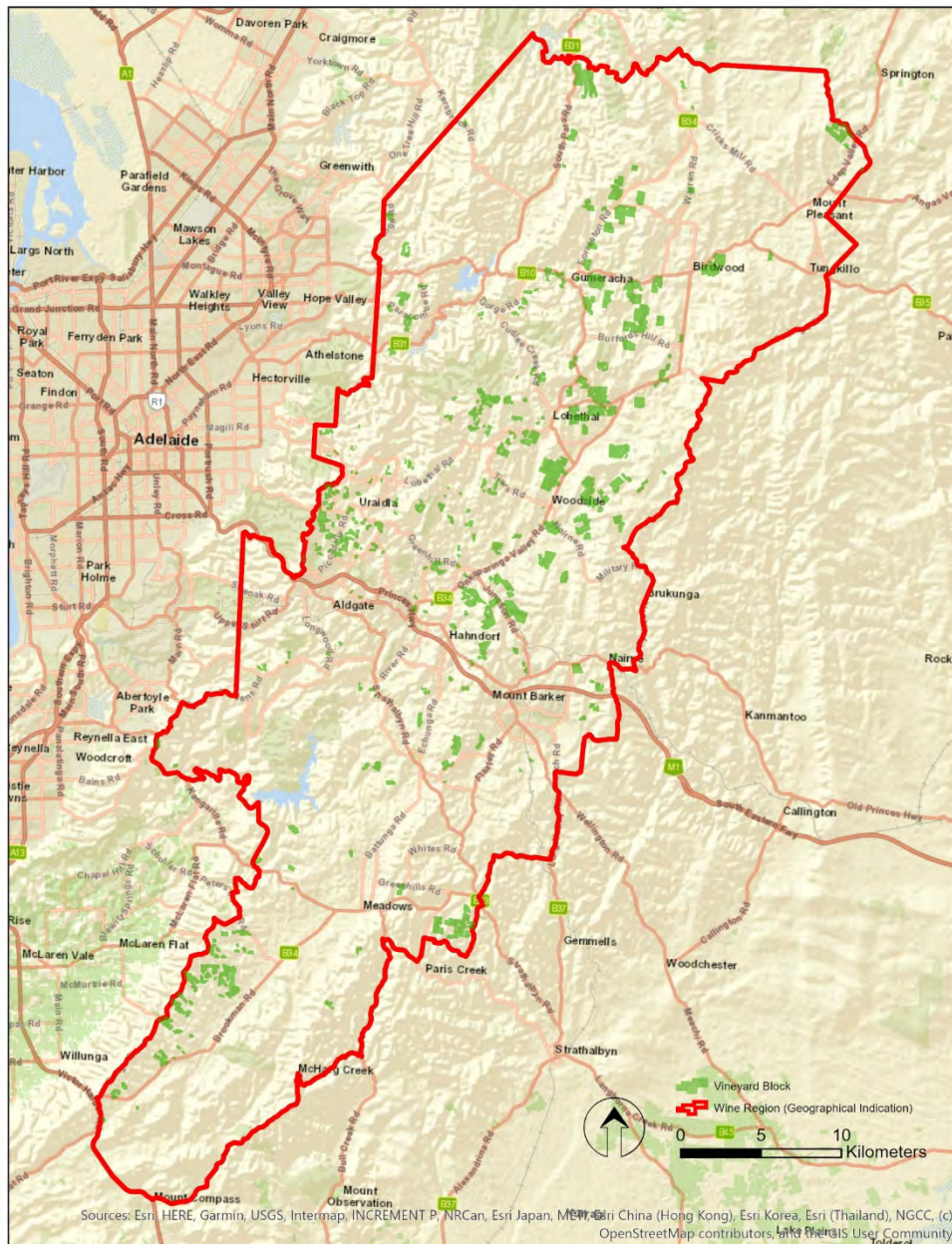
Source: Vinehealth Australia

SA Winegrape Crush Survey 2020

Regional Summary Report

Adelaide Hills Wine Region

Wine Australia July 2020



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
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 2020 was marked by weather extremes and the Cudlee Creek bushfire which impacted on 761 ha of vineyard plantings in the region. However, the benefit of cool climate viticulture won through for the rest of the district with winemakers crafting crisp white wines and stunning reds.

The grape growing season began well then faced unseasonably cold conditions in the final stages of flower development and flowering. This meant that grapes failed to set and for the second consecutive season yields were below 60% of the average crops of the mid-2010s. Unlike its neighbours, the Adelaide Hills had just two heatwaves during the growing season. The first, over 5 days, resulted in the Cudlee Creek bushfire which broke out on December 20. The second heatwave, over the last four days of December, caused minimal damage as grape berries were still hard and green and resistant to heat damage. The remainder of summer included several heat spikes meaning that vine canopies remained undamaged, fully protecting berries as they ripened.

The ripening period, in contrast to December, was cool. February was the coldest since the 1990s and January, March and April were mild. Welcome rains (80 – 110 mm) in late January / early February were timely in breaking a run of unseasonably dry weather and setting up perfect ripening conditions. Disease pressure was low as spring was dry and the rains were at a time of the season that caused minimal damage.

Richard Hamilton – Hamilton Viticulture

On behalf of Adelaide Hills Wine Region

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Adelaide Hills winegrapes was 12,049 tonnes in 2020, down 25 per cent on the 2019 crush of 16,021 tonnes, and the lowest reported crush since 2002. Over the past five years (up to 2019), the average crush for the Adelaide Hills has been 24,809 tonnes, making this year's crush 51 per cent below the five-year average.

There were 72 respondents to the survey who reported crushing grapes from the Adelaide Hills in 2020, compared with 76 in 2019.

The total value of winegrapes in 2020 decreased by \$5 million to \$19.5 million as a result of the lower production, although this was partly offset by an overall increase in the average purchase value of grapes, which increased by 7 per cent from \$1520 to \$1626 per tonne.

There were increases in average prices for the three largest varieties: Pinot Noir up by 16 per cent to \$1865 per tonne, Sauvignon Blanc up 4 per cent to \$1440 per tonne and Chardonnay up by 3 per cent to \$1689 per tonne.

The price dispersion data shows a big upward shift in prices paid, with 72 per cent of red grapes being sold at \$1500 per tonne or above compared with 50 per cent in 2019, and 61 per cent of whites being sold in the same price range compared with 47 per cent in 2019.

There were 18 hectares of new vines planted in the region in the 2019-20 season compared with 56 hectares in the previous season. The plantings were predominantly split between the major varieties Pinot Noir, Sauvignon Blanc and Chardonnay.

The total vineyard area in the Adelaide Hills as at 30 April 2020 is 3760 hectares – a small net reduction since 2019 (3830 hectares) and 100 hectares below the total area five years ago.

Adelaide Hills

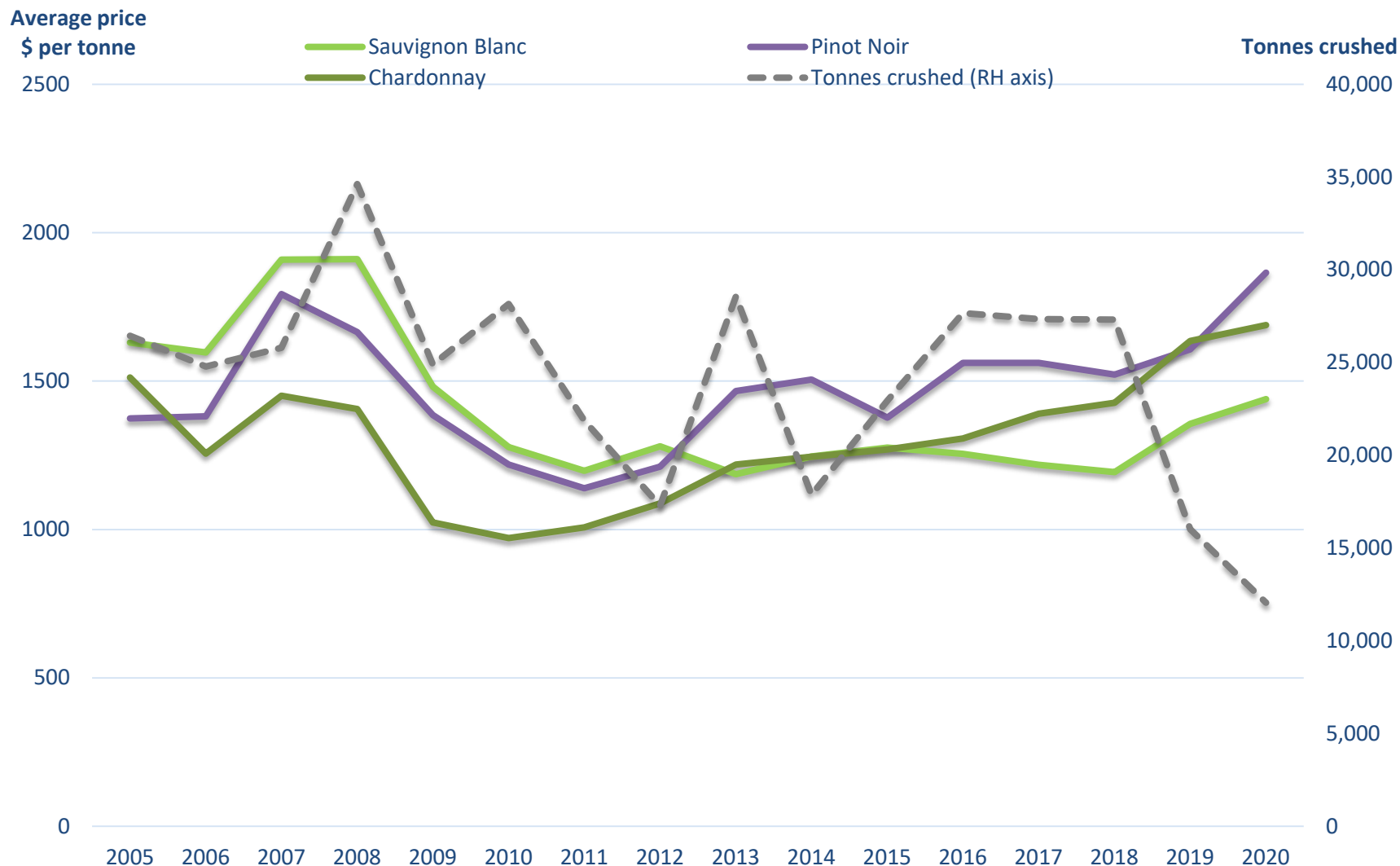
Winegrape intake summary table

	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				6	68%	9	\$18,951
Cabernet Franc	1				1					8	93%	9	\$14,386
Cabernet Sauvignon	183			74	64	45	\$296,853	\$1,623	-9%	112	38%	294	\$478,006
Malbec	2				2						0%	2	\$2,816
Mataro/Mourvedre										4	100%	4	\$7,293
Merlot	267			230	37		\$284,819	\$1,066	3%	11	4%	278	\$296,252
Montepulciano	7				7						0%	7	\$12,040
Nebbiolo	8				8					30	80%	38	\$71,934
Nero d'Avola	3					3					0%	3	\$5,600
Petit Verdot	7				7						0%	7	\$10,400
Pinot Meunier	76				48	29	\$144,699	\$1,894	22%		0%	76	\$144,699
Pinot Noir	1,984		21	439	864	660	\$3,700,662	\$1,865	16%	440	18%	2,424	\$4,522,302
Sangiovese	32			4	23	5	\$52,102	\$1,605	7%	1	3%	33	\$53,611
Shiraz	511			119	82	310	\$1,048,022	\$2,053	-3%	349	41%	859	\$1,763,876
Tempranillo	49				20	29	\$97,222	\$1,983	0%	9	16%	58	\$115,899
Other red	17				7	10	\$36,432	\$2,132	7%	12	41%	29	\$62,016
Red total	3,148		21	866	1,169	1,093	\$5,713,069	\$1,815	14%	982	24%	4,131	\$7,580,080
White													
Chardonnay	1,619			493	670	457	\$2,734,886	\$1,689	3%	462	22%	2,082	\$3,515,957
Fiano	5		4			1					0%	5	\$4,020
Gewurztraminer										1	100%	1	\$1,333
Gruner Veltliner	70				44	24	\$140,505	\$2,002	1%	42	38%	112	\$224,958
Muscat a petits grains blancs	4			4							0%	4	\$3,328
Pinot Gris/Grigio	910		36	484	290	85	\$1,299,292	\$1,427	-7%	297	25%	1,208	\$1,723,400
Prosecco										19	100%	19	\$15,727
Riesling	57				16	41	\$115,646	\$2,032	57%	23	29%	80	\$161,857
Roussanne										3	100%	3	\$4,777
Sauvignon Blanc	2,683		20	1,035	1,479	136	\$3,861,458	\$1,439	6%	1,491	36%	4,173	\$6,007,035
Semillon	93			83	10		\$98,525	\$1,065	7%	63	40%	155	\$165,504
Vermentino	4			4							0%	4	\$5,083
Viognier	17			11	6		\$20,326	\$1,177	-3%	10	36%	27	\$31,872
Other white	21				21	1	\$36,232	\$1,692	6%	24	53%	45	\$76,395
White total	5,484		60	2,114	2,535	745	\$8,320,682	\$1,517	3%	2,435	31%	7,918	\$11,941,245
Grand total	8,632		80	2,981	3,704	1,838	\$14,033,486	\$1,626	7%	3,417	28%	12,049	\$19,521,325

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

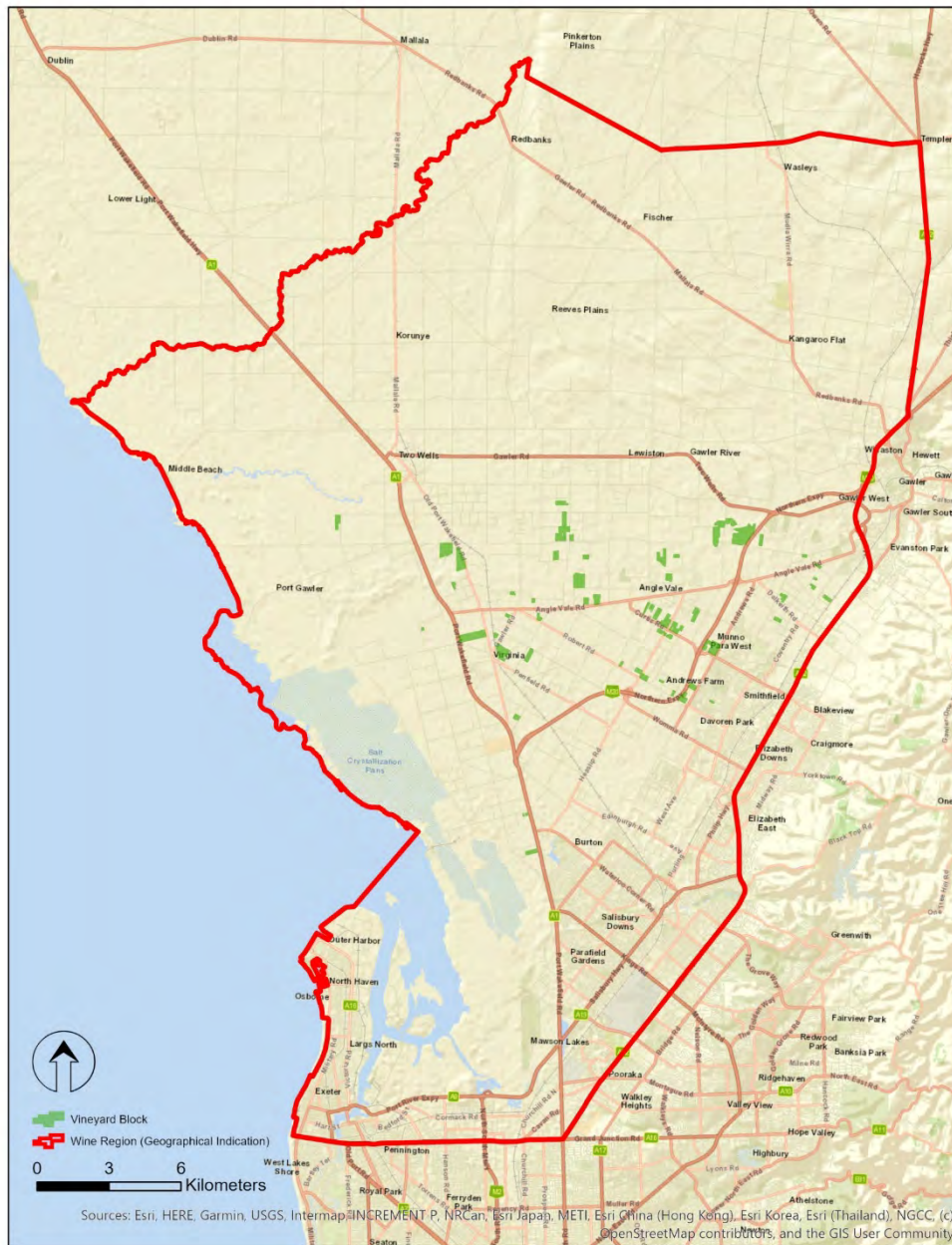


Adelaide Hills

Current plantings by variety and year planted

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Franc	8	0	0	0	8	0%
Cabernet Sauvignon	196	18	0	0	214	0%
Grenache	2	0	0	0	2	0%
Merlot	140	0	0	0	140	0%
Meunier (Pinot Meunier)	21	0	0	0	21	0%
Nebbiolo	11	0	2	1	14	7%
Pinot Noir	642	7	14	5	668	1%
Sangiovese	13	0	1	0	14	0%
Shiraz	362	4	14	0	380	0%
Tempranillo	30	2	0	0	32	0%
Other Red	35	1	4	2	42	5%
Total red varieties	1,460	32	35	8	1,535	1%
White winegrapes						
Chardonnay	800	11	4	4	819	0%
Gruner Veltliner	18	1	0	0	19	0%
Pinot Gris	245	5	5	0	255	0%
Riesling	53	1	1	0	55	0%
Sauvignon Blanc	902	11	0	4	917	0%
Semillon	35	0	0	0	35	0%
Traminer (Gewurztraminer)	20	0	0	0	20	0%
Viognier	21	0	0	0	21	0%
Other White	39	3	3	2	47	4%
Total white varieties	2,133	32	13	10	2,188	0%
Rootstock Block	2	0	0	0	2	0%
Unknown variety	27	0	8	0	35	0%
Total all varieties	3,622	64	56	18	3,760	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2020

Regional Summary Report

Adelaide Plains Wine Region

Wine Australia July 2020

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
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

The reported crush of Adelaide Plains winegrapes was 2125 tonnes in 2020, down by 28 per cent on the 2019 reported crush of 2964 tonnes. Over the past five years (up to 2019), the average crush for the Adelaide Plains has been 3118 tonnes, making this year's crush 32 per cent below the five-year average.

There were 8 respondents to the survey who reported crushing grapes from the Adelaide Plains in 2020, compared with 9 in 2019.

The total estimated value of winegrapes in 2020 decreased from just under \$3 million in 2019 to \$2.3 million as a result of the lower production, although this was partly offset by an overall increase in the average purchase value of grapes, which increased by 8 per cent from \$998 to \$1081 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up by 6 per cent to \$1136 per tonne, Sauvignon Blanc up 2 per cent to \$999 per tonne and Cabernet Sauvignon up by 1 per cent to \$1063 per tonne.

The price dispersion data shows a very narrow band of prices paid, with 83 per cent of reds and 100 per cent of whites being sold at between \$600 and \$1500 per tonne.

There were no new plantings in the region in the 2019-20 season for the third year in a row.

The total vineyard area in the Adelaide Plains as at 30 April 2020 is 443 hectares compared with 486 hectares in 2019 and is 76 hectares (15 per cent) below the total area five years ago.

Adelaide Plains

Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red									0				
Cabernet Sauvignon	193			193			\$205,292	\$1,063	1%	4	2%	197	\$209,542
Grenache	67			67							0%	67	\$55,734
Mataro/Mourvedre	47			15	32						0%	47	\$70,088
Merlot	109			98	11		\$96,399	\$883	7%		0%	109	\$96,399
Montepulciano													\$0
Nebbiolo													\$0
Pinot Noir	37		37								0%	37	\$18,380
Sangiovese	19			19							0%	19	\$14,183
Shiraz	1,098			909	186	3	\$1,247,251	\$1,136	6%		0%	1,098	\$1,247,251
Tempranillo	9			9							0%	9	\$11,258
Red total	1,579		37	1,310	229	3	\$1,718,584	\$1,088	7%	4	0%	1,583	\$1,722,834
White													\$0
Chardonnay	125			125							0%	125	\$129,994
Chenin blanc													\$0
Pinot Gris/Grigio	187			187							0%	187	\$211,028
Sauvignon Blanc	224			224			\$223,550	\$999	2%		0%	224	\$223,550
Viognier	6			6							0%	6	\$8,708
White total	542			542			\$573,280	\$1,058	13%		0%	542	\$573,280
Grand total	2,121		37	1,852	229	3	\$2,291,864	\$1,081	8%	4	0%	2,125	\$2,296,114

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	49	0	0	0	49	0%
Grenache	20	0	0	0	20	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	22	0	0	0	22	0%
Pinot Noir	13	0	0	0	13	0%
Sangiovese	5	0	0	0	5	0%
Shiraz	205	0	0	0	205	0%
Other Red	14	0	0	0	14	0%
Total red varieties	337	0	0	0	337	0%
White winegrapes						
Chardonnay	26	0	0	0	26	0%
Colombard	1	0	0	0	1	0%
Pinot Gris	32	0	0	0	32	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	21	0	0	0	21	0%
Other White	8	0	0	0	8	0%
Total white varieties	92	0	0	0	92	0%
Unknown variety	14	0	0	0	14	0%
Total all varieties	443	0	0	0	443	0%

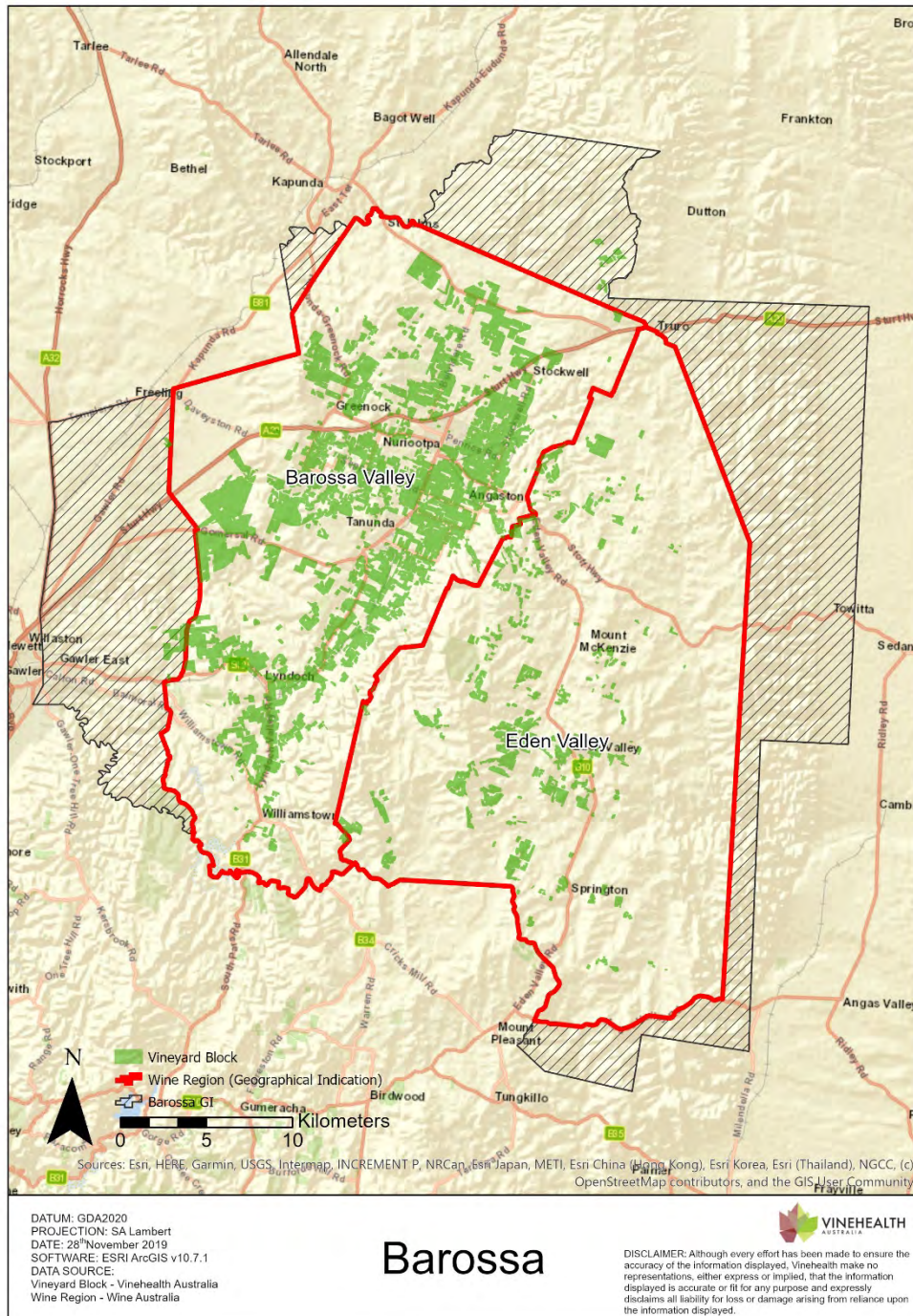
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2020

Regional Summary Report

Barossa Including Barossa Valley and Eden Valley

Wine Australia July 2020



Barossa

Vintage overview

VINTAGE REPORT

Barossa Valley

The growing season started dry and continued that way. The January to June 2019 rainfall was 60% of average. Winter 2019 rain was more promising with 148mm (88% of average), but spring 65mm (54%) and summer 40mm (74%) didn't follow up on the promise. March recorded only 2.8mm (11%) of rain.

The 2019 calendar year was the driest on record for the Nuriootpa weather station.

In some parts of Barossa, flowering was upset by a frost on 18 October. In early November flowering wine grapes endured a period of strong winds, followed by many cold nights through mid-November (day and night temperatures 1 to 1.5 degrees below average). Then in late November, extremely hot weather affected later flowering areas and varieties, notably the 42-degree day on 20 November.

A hot December followed. Of the last 16 days in December, 11 were over 35C and 8 over 40C.

Not surprisingly, the combination of all these extremes meant the vines generally set below average bunch size, and berries remained smaller than normal as they developed.

Later January and February provided some relief. Average February maximum temperature was 26.5C – 3C below average, with average minimum temperature 13.4C, which is 1.2C below the average. This, combined with 21mm of rain on 1 February, enabled many vineyards to slowly ripen their grapes, with flavour and phenological ripening keeping pace with sugar development.

Yields varied from vineyard to vineyard and variety to variety, but most are well below average.

The good news is flavours and colours (in reds) and overall quality is exceptional. Early standout varieties include Shiraz, Grenache and Cabernet Sauvignon..

Eden Valley

Rainfall in Eden Valley for winter 2019 totalled 249mm, slightly higher than winter 2018's total of 226mm. The 2019 total was just 7% below average. However, rainfall totals dropped significantly through spring, reaching only 63% of the long-term average. This trend continued into summer, with growing season rainfall amounting to 125mm, or 67% of average, which was the driest growing season since 2009.

October 2019 recorded a mean maximum temperature 2.18°C warmer than average, whilst December was 3.79°C warmer than average. The October high was driven by a number of days above 30°C, which is unusual for that time of year.

December recorded 9 days where the mercury exceeded 35°C, in two separate heatwave events lasting 5 and 4 days respectively. 20 December recorded a stifling 42°C, and it was the hottest December on record.

February in Eden Valley was unusually cool, with the average maximum temperature of 24.1C being 2.9°C below average. The wines are of exceptional quality. Whites, particularly Riesling and Chardonnay are fine and intense. Reds are deeply coloured and perfumed.

Report prepared by Barossa Grape & Wine Association, in partnership with Yalumba viticulturist Brooke Howell and Yalumba head of winemaking Louisa Rose.

Barossa

Vintage overview

OVERVIEW OF VINTAGE STATISTICS

Barossa Valley

The reported crush of Barossa Valley winegrapes (including Barossa zone – other) was 29,069 tonnes in 2020, down by 29 per cent from the 2019 reported crush of 40,987 tonnes. It was the lowest recorded crush for the region since the survey started in 1996. Over the past five years (up to 2019), the average crush for the Barossa Valley has been 54,661 tonnes, making this year's crush 47 per cent below the five-year average.

There were 80 respondents to the survey who reported crushing grapes from the Barossa Valley in 2020, compared with 78 in 2019.

The total estimated value of winegrapes in 2020 was just under \$67 million compared with \$84 million in 2019. The lower production was partly offset by an overall increase in the average purchase value of grapes, which increased by 12 per cent from \$1992 to \$2228 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up 13 per cent to \$2612 per tonne, Cabernet Sauvignon up 13 per cent to \$2321 per tonne and Grenache up 17 per cent to \$2197 per tonne.

The price dispersion data for red varieties shows a very narrow band of prices paid, with 85 per cent of reds being purchased at \$2000 per tonne and above. For white varieties, the range was even narrower, with 95 per cent being sold at between \$600 and \$1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in the Barossa Valley as at 30 April 2020 was 11,801 hectares in 2020, including 237 hectares in Barossa zone – other. This is about 500 hectares more than it was 5 years ago.

There were 86 hectares of new vines planted in the region in the 2019-20 season (including top-working and replacements), with over half being Shiraz.

OVERVIEW OF VINTAGE STATISTICS

Eden Valley

The reported crush of Eden Valley winegrapes was 3624 tonnes in 2020, down by 34 per cent from the 2019 reported crush of 5477 tonnes. It was the lowest recorded crush for the region since the survey started in 1996. Over the past five years (up to 2019), the average crush for Eden Valley has been 9853 tonnes, making this year's crush 63 per cent below the five-year average.

There were 41 respondents to the survey who reported crushing grapes from Eden Valley in 2020, the same as in 2019.

The total estimated value of winegrapes in 2020 decreased from just over \$10 million in 2019 to \$7.6 million as a result of the lower production, although this was partly offset by an overall increase in the average purchase value of grapes, which increased by 13 per cent from \$1907 to \$2147 per tonne.

There were increases in average prices for the three largest varieties: Riesling up by 8 per cent to \$1780 per tonne, Shiraz up 8 per cent to \$2979 per tonne and Chardonnay up by 14 per cent to \$1627 per tonne.

83 per cent of red varieties were sold at \$2000 per tonne and above. The majority (66%) of whites was sold at between \$1500 and \$2000 per tonne.

According to Vinehealth Australia data, there were 82 hectares of new vines planted in the region in the 2019-20 season. Almost all the new plantings were Shiraz and Cabernet Sauvignon.

The total vineyard area in Eden Valley as at 30 April 2020 increased by 46 hectares from 2333 hectares in 2019 to 2379 hectares in 2020, indicating that about half of the new plantings were replacements of older vines. The area of vines in Eden Valley is now approximately 100 hectares (5 per cent) larger than it was five years ago.

Barossa

Barossa Valley* winegrape intake summary table – red varieties

* Includes Barossa zone other – 741 tonnes

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Barbera	1				1						0%	1	\$1,998
Cabernet Franc	43			28	11	4	\$60,116	\$1,393	7%	5	10%	48	\$66,441
Cabernet Sauvignon	2,029			5	305	1,719	\$4,708,508	\$2,321	13%	1,796	47%	3,824	\$8,876,212
Durif	50				23	27	\$101,845	\$2,024	17%	3	5%	53	\$107,311
Graciano	10			3	7		\$15,912	\$1,566		10	50%	20	\$32,004
Grenache	1,254			11	331	911	\$2,754,203	\$2,197	17%	305	20%	1,559	\$3,424,920
Lagrein	0			0							0%	0	\$280
Malbec	12			1	4	7	\$23,691	\$1,990	8%	42	78%	54	\$107,428
Mataro/Mourvedre	383			8	69	306	\$869,592	\$2,272	17%	249	39%	632	\$1,435,073
Merlot	414			220	194		\$601,219	\$1,451	29%	175	30%	590	\$855,766
Montepulciano	21			1	4	16	\$63,817	\$2,990	61%	18	45%	39	\$116,343
Muscat a petits grains rouges	8			8							0%	8	\$6,090
Nero d'Avola	1				1					10	89%	11	\$21,171
Petit Verdot	15				12	3				46	75%	61	\$113,639
Pinot Noir	98			98			\$84,940	\$866	8%		0%	98	\$84,940
Sangiovese	156			130	25		\$214,464	\$1,377	-2%	16	9%	172	\$236,781
Shiraz	10,269				504	9,764	\$26,820,934	\$2,612	13%	8,046	44%	18,315	\$47,836,262
Tempranillo	116				74	42	\$232,486	\$2,007	10%	27	19%	143	\$286,844
Touriga Nacional										51	100%	51	\$98,379
Other red	123			56	42	26	\$194,859	\$1,580	-4%	53	30%	177	\$278,946
Red total	15,004			570	1,608	12,825	\$36,785,398	\$2,452	14%	10,852	42%	25,856	\$63,986,826

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

Barossa

Barossa Valley* winegrape intake summary table – white varieties

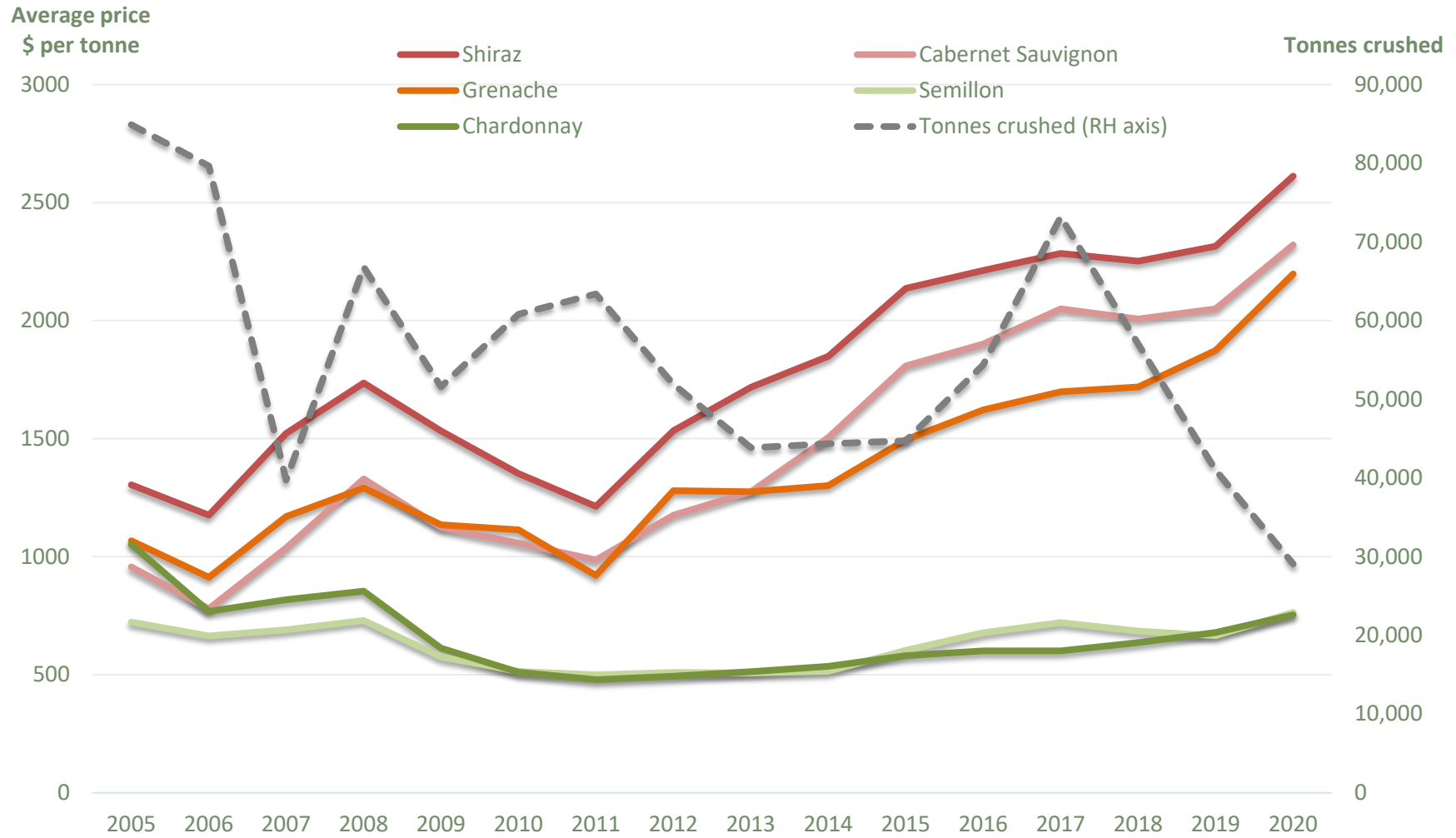
* Includes Barossa zone other – 2 tonnes

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
White													
Chardonnay	783			780	1	3	\$589,684	\$753	11%	292	27%	1,076	\$809,609
Chenin blanc	4				4						0%	4	\$7,548
Fiano										13	100%	13	\$20,685
Gewurztraminer	40			40							0%	40	\$29,775
Marsanne	7				7		\$10,147	\$1,521	-5%	13	66%	20	\$29,936
Muscat a petits grains blancs	156			154	1	1	\$171,640	\$1,100	17%	48	23%	204	\$224,254
Pinot Gris/Grigio	102			97	5		\$110,049	\$1,083		42	29%	144	\$155,509
Riesling	359			345	14		\$320,214	\$892	4%	58	14%	417	\$372,048
Roussanne	4				4		\$6,460	\$1,709		1	12%	4	\$7,335
Sauvignon Blanc	230			230			\$200,800	\$873	2%	18	7%	248	\$216,420
Semillon	547		2	527	18		\$417,809	\$763	15%	121	18%	668	\$510,043
Vermentino	44			42	3		\$42,738	\$966		6	11%	50	\$48,108
Viognier	209			158	37	14	\$282,286	\$1,350	1%	13	6%	222	\$299,303
Other white	17			7	3	6	\$29,105	\$1,756	33%	88	84%	105	\$183,722
White total	2,502		2	2,381	95	23	\$2,218,255	\$887	9%	712	22%	3,214	\$2,914,295
Grand total	17,506		2	2,952	1,704	12,849	\$39,003,653	\$2,228	12%	11,563	40%	29,069	\$66,901,120

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

Eden Valley winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Barbera										0	100%	0	\$704
Cabernet Franc	7					7				2	26%	9	\$23,063
Cabernet Sauvignon	117					117	\$349,016	\$2,973	19%	131	53%	248	\$737,180
Durif										0	100%	0	\$175
Graciano	3					3				2	35%	4	\$9,559
Grenache	10				3	7	\$26,654	\$2,737	9%	2	15%	11	\$31,175
Lagrein										0	100%	0	\$221
Mataro/Mourvedre	3					3				6	69%	8	\$21,283
Merlot	45			11	32	3	\$73,505	\$1,640	23%	30	40%	75	\$122,859
Montepulciano	3					3				8	75%	11	\$26,321
Nebbiolo										1	100%	1	\$2,174
Nero d'Avola	2					2					0%	2	\$3,955
Petit Verdot										21	100%	21	\$23,691
Pinot Noir	67			56	11		\$86,879	\$1,303	5%	28	29%	94	\$122,813
Shiraz	601				34	567	\$1,789,493	\$2,979	8%	355	37%	956	\$2,847,672
Tempranillo	8					8				0	2%	8	\$17,001
Other red	2			2						11	86%	12	\$14,036
Red total	866			68	79	719	\$2,384,576	\$2,755	15%	596	41%	1,462	\$4,003,881
White													
Chardonnay	145			12	129	4	\$236,453	\$1,627	14%	201	58%	346	\$563,001
Gewurztraminer	27			27						2	8%	30	\$34,260
Gruener Veltliner										3	100%	3	\$6,620
Muscat a petits grains blancs	19			17	1	1	\$19,646	\$1,031		1	4%	20	\$20,547
Pinot Gris/Grigio	43			21	22		\$66,231	\$1,526	13%	138	76%	181	\$276,463
Riesling	522			10	421	91	\$929,474	\$1,780	8%	690	57%	1,212	\$2,157,316
Roussanne	23			8	15					3	12%	26	\$39,533
Sauvignon Blanc	48			41	7		\$49,583	\$1,044	7%	62	57%	110	\$114,487
Semillon	84			84			\$60,372	\$720	1%	12	12%	96	\$68,826
Viognier	36				26	10	\$86,556	\$2,391	21%	48	57%	84	\$201,617
Other white	12				12					43	78%	55	\$87,776
White total	960			220	633	106	\$1,533,927	\$1,598	5%	1,203	56%	2,162	\$3,570,446
Grand total	1,825			288	712	825	\$3,918,502	\$2,147	13%	1,799	50%	3,624	\$7,574,327

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

Barossa

Barossa Valley* current plantings by variety and year planted – red varieties

** Includes Barossa zone other – 227 hectares*

Variety	Pre-2017	2017	2018	2019	Total area	% planted in 2019
Red winegrapes						
Cabernet Franc	23	2	0	0	25	0%
Cabernet Sauvignon	1,554	39	39	18	1650	1%
Durif (Petite Sirah)	20	0	0	1	21	5%
Grenache	629	4	5	18	656	3%
Malbec	24	4	2	0	30	0%
Mataro (Mourvedre)	269	15	6	0	290	0%
Merlot	281	2	0	0	283	0%
Petit Verdot	19	0	0	0	19	0%
Pinot Noir	35	0	0	0	35	0%
Sangiovese	28	0	0	0	28	0%
Shiraz	7,240	150	111	48	7549	1%
Tempranillo	96	0	0	0	96	0%
Zinfandel	12	0	0	0	12	0%
Other Red	102	5	6	0	113	0%
Total red varieties	10,332	221	169	85	10,807	1%

*Source:
Vinehealth
Australia*

Barossa

Barossa Valley* current plantings by variety and year planted – white varieties

** Includes Barossa zone other – 10 hectares (variety unknown)*

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
White winegrapes						
Chardonnay	264	0	0	0	264	0%
Chenin Blanc	11	0	0	0	11	0%
Marsanne	8	0	1	0	9	0%
Muscadelle (Tokay)	12	0	0	0	12	0%
Muscat A Petit Grains Blanc (White Frontignac)	47	0	0	0	47	0%
Pedro Ximenez	5	0	0	0	5	0%
Pinot Gris	13	0	0	0	13	0%
Riesling	134	0	0	0	134	0%
Sauvignon Blanc	48	0	0	0	48	0%
Semillon	274	0	0	0	274	0%
Vermentino	7	0	0	0	7	0%
Viognier	50	0	0	0	50	0%
Other White	43	0	1	1	45	2%
Total white varieties	916	0	2	1	919	0%
Unknown variety	75	0	0	0	75	0%
Total all varieties	11,323	221	171	86	11,801	1%

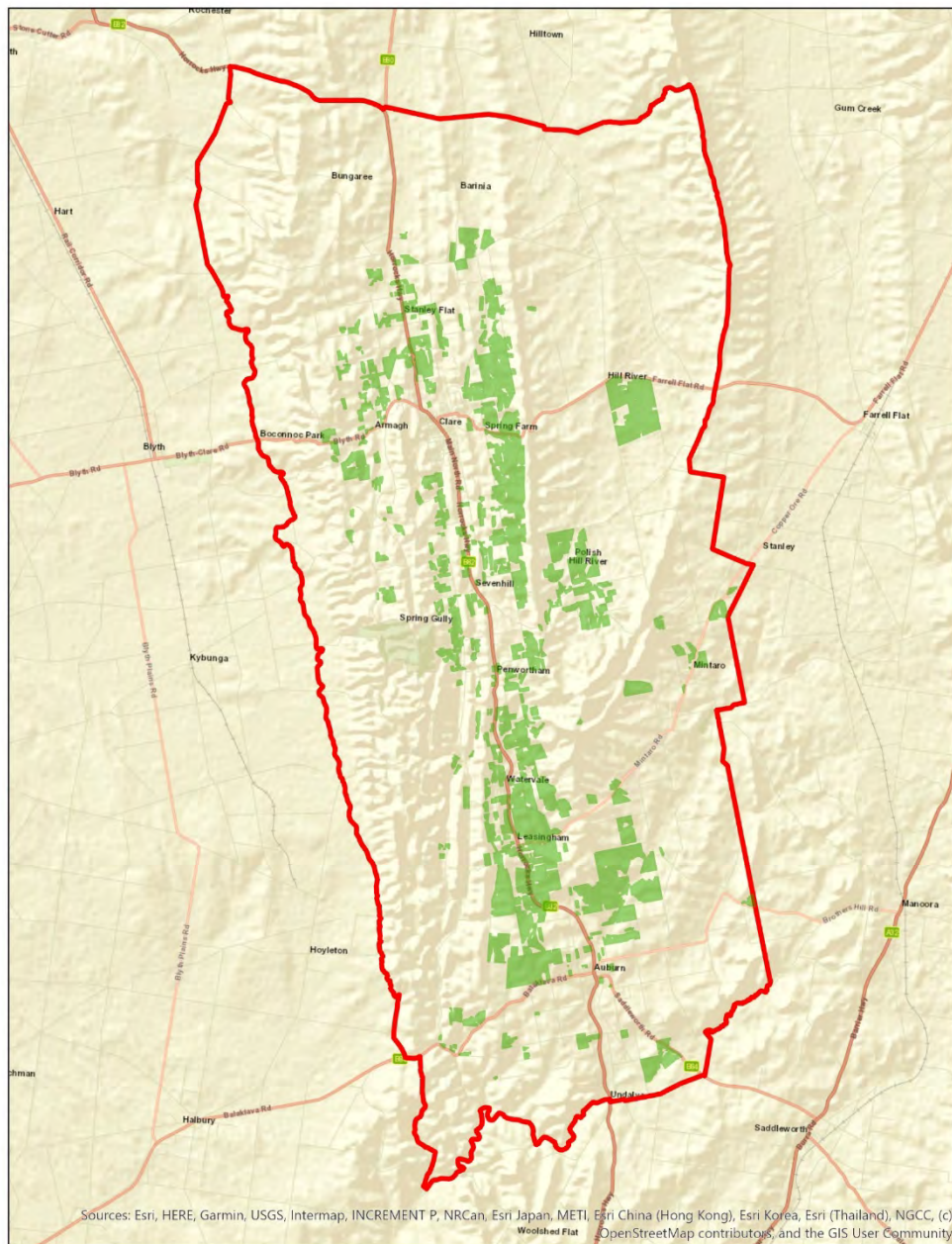
*Source:
Vinehealth
Australia*

Barossa

Eden Valley current plantings by variety and year planted

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	334	8	3	37	382	10%
Grenache	20	0	0	1	21	5%
Mataro (Mourvedre)	16	0	0	1	17	6%
Merlot	57	0	0	0	57	0%
Petit Verdot	7	0	0	0	7	0%
Pinot Noir	51	3	0	0	54	0%
Shiraz	757	15	30	41	843	5%
Tempranillo	12	0	0	0	12	0%
Other Red	15	3	0	0	18	0%
Total red varieties	1,275	29	33	80	1,417	6%
White winegrapes						
Chardonnay	244	0	0	0	244	0%
Muscat A Petit Grains Blanc (White Frontignac)	6	0	0	0	6	0%
Pinot Gris	40	0	0	0	40	0%
Riesling	519	0	5	2	526	0%
Sauvignon Blanc	42	0	0	0	42	0%
Semillon	17	0	0	0	17	0%
Traminer (Gewurztraminer)	16	0	0	0	16	0%
Viognier	33	0	0	0	33	0%
Other White	20	0	0	0	20	0%
Total white varieties	937	0	5	2	944	0%
Unknown variety	18	0	0	0	18	0%
Total all varieties	2,230	29	38	82	2,379	3%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2020

Regional Summary Report

Clare Valley Wine Region

Wine Australia July 2020

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: Esri ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Clare Valley Wine Region



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Clare Valley

Vintage overview

VINTAGE REPORT

Below-average winter rainfall led to low soil-moisture reserves at the start of the growing season in September and many vineyards applied irrigation during winter and spring to set up the vines for the forecast dry season. Dry conditions continued during spring, with the three months recording lower than average rainfall, and large volumes of irrigation water were used throughout the district to meet the plants' requirements.

Maximum temperatures were also higher than average during spring which increased the vines' demand for water. A 40°C day on 20 November impacted on the fruit set of several varieties and was one of the factors that led to an extremely low-yielding harvest. Careful management of grapevine water and nutrient requirements was imperative this season to retain vine canopies and maximise yield.

Riesling was the star performer in terms of yield this season with yields down on average by only 15-30 per cent. Red varieties, including Shiraz and Cabernet Sauvignon, recorded lower yields, down on average by 40-80 per cent, challenging the profitability of some enterprises.

Milder temperatures in the New Year, particularly in February, were a welcome relief and provided ideal ripening conditions for flavour development and steady rates of sugar accumulation.

Good vine health and retaining the canopy had a huge bearing on results and growers who achieved this produced excellent quality fruit this year.

Vintage flowed well, with most of the fruit harvested by the end of March.

Record rainfall for the month of April has led to an early break and heralds a good season ahead for 2020-2021.

*Lucy O'Brien - General Manager
Clare Valley Wine & Grape Association*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Clare Valley winegrapes was 11,946 tonnes in 2020, down by 23 per cent from the 2019 reported crush of 15,583 tonnes. It was the lowest recorded crush for the region since the survey started in 1996. Over the past five years (up to 2019), the average crush for the Clare Valley has been 20,926 tonnes, making this year's crush 43 per cent below the five-year average.

There were 42 respondents to the survey who reported crushing grapes from the Clare Valley in 2020, compared with 41 in 2019.

The total estimated value of winegrapes in 2020 was just over \$19 million compared with \$22 million in 2019. The lower production was partly offset by an overall increase in the average purchase value of grapes, which increased by 14 per cent from \$1373 in 2019 to \$1562 per tonne.

There were increases in average prices for the three largest varieties: Riesling up by 22 per cent to \$1406 per tonne, Shiraz up 8 per cent to \$1976 per tonne and Cabernet Sauvignon up by 16 per cent to \$1747 per tonne.

The price dispersion data for red varieties shows a big upward shift in prices paid, with 71 per cent of reds being purchased at \$1500 per tonne and above, compared with 51 per cent in 2019. For white varieties, 41 per cent of tonnes were sold at \$1500 or above, compared with just 5 per cent in 2019.

According to Vinehealth Australia data, the total vineyard area in the Clare Valley as at 30 April 2020 is 5050 hectares, a net increase of 34 hectares compared with 2019, but about 200 hectares less than it was 5 years ago.

There were 56 hectares of new vines planted in the region in the 2019-20 season (including top-working and replacements), with one-third being Cabernet Sauvignon and one-third Shiraz.

Clare Valley

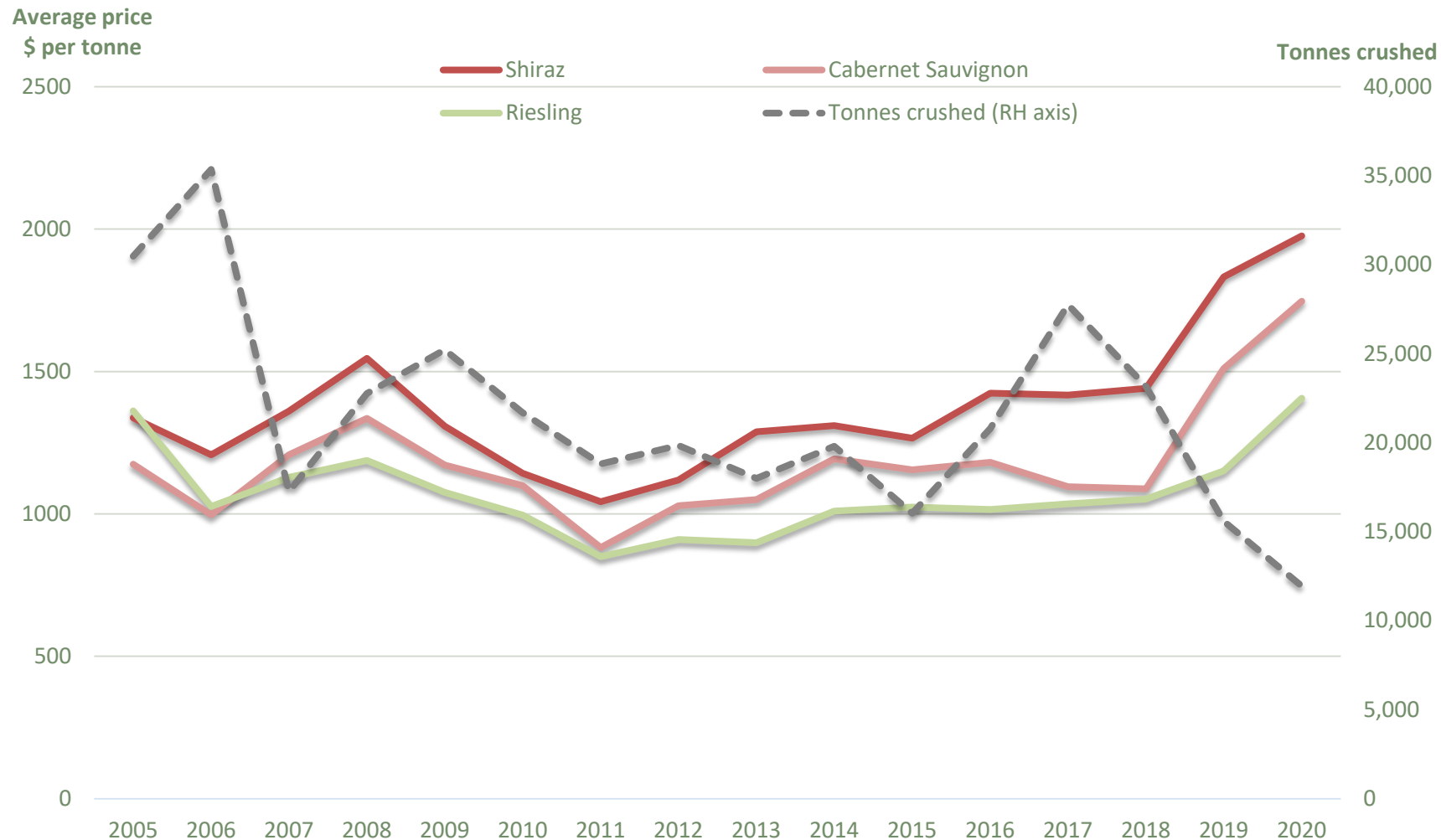
Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Cabernet Franc	0			0						9	96%	9	\$13,349
Cabernet Sauvignon	585			163	268	154	\$1,022,828	\$1,747	16%	917	61%	1,503	\$2,625,168
Graciano										6	100%	6	\$11,195
Grenache	39			20	16	3	\$55,630	\$1,441	-4%	124	76%	163	\$234,601
Malbec	44			11	29	4	\$69,071	\$1,558	6%	91	67%	136	\$211,275
Mataro/Mourvedre	51				40	11	\$96,211	\$1,873	17%	23	31%	75	\$139,931
Merlot	298			298			\$320,365	\$1,076	8%	289	49%	587	\$631,690
Montepulciano	2					2				8	79%	11	\$21,258
Muscat a petits grains rouges										1	100%	1	\$983
Nebbiolo										3	100%	3	\$6,117
Petit Verdot	34				34						0%	34	\$67,480
Pinot Noir										26	100%	26	\$49,864
Sangiovese	25			25			\$26,967	\$1,084	3%	43	64%	68	\$73,882
Shiraz	1,623			281	677	665	\$3,208,352	\$1,976	8%	2,040	56%	3,663	\$7,239,593
Tempranillo	19			8	11		\$25,883	\$1,376	17%	42	69%	61	\$83,573
Touriga Nacional										8	100%	8	\$15,306
Other red										3	100%	3	\$4,089
Red total	2,721			806	1,076	840	\$4,897,695	\$1,800	11%	3,634	57%	6,355	\$11,429,354
White													
Chardonnay	128			128			\$132,473	\$1,032	12%	177	58%	305	\$315,151
Fiano	4			4						24	85%	29	\$34,284
Gewurztraminer	13			7	6					19	60%	32	\$39,118
Pinot Gris/Grigio	66			66			\$84,502	\$1,273	5%	219	77%	286	\$363,643
Riesling	2,818			1,517	1,167	134	\$3,961,690	\$1,406	22%	1,851	40%	4,669	\$6,563,791
Sauvignon Blanc										21	100%	21	\$23,844
Semillon	135		1	134			\$97,036	\$718	12%	28	17%	163	\$117,335
Vermentino	3			3							0%	3	\$4,116
Viognier	0			0						38	99%	39	\$46,572
Other white										43	100%	43	\$72,055
White total	3,169		1	1,862	1,172	134	\$4,301,350	\$1,357	22%	2,421	43%	5,591	\$7,579,910
Grand total	5,890		1	2,668	2,248	974	\$9,199,045	\$1,562	14%	6,056	51%	11,946	\$19,009,264

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Franc	16	0	0	2	18	11%
Cabernet Sauvignon	1,096	11	11	18	1,136	2%
Grenache	64	2	0	0	66	0%
Malbec	79	3	1	0	83	0%
Mataro (Mourvedre)	33	1	0	0	34	0%
Merlot	248	0	0	6	254	2%
Nebbiolo	3	0	0	0	3	0%
Sangiovese	25	0	0	0	25	0%
Shiraz	1,837	22	26	18	1,903	1%
Tempranillo	37	0	0	0	37	0%
Other Red	43	2	3	0	48	0%
Total red varieties	3,481	41	41	44	3,607	1%
White winegrapes						
Chardonnay	142	0	0	0	142	0%
Pinot Gris	57	0	1	6	64	9%
Riesling	1,035	12	0	6	1,053	1%
Sauvignon Blanc	14	0	0	0	14	0%
Semillon	79	0	0	0	79	0%
Traminer (Gewurztraminer)	23	0	0	0	23	0%
Viognier	10	0	0	0	10	0%
Other White	37	2	1	0	40	0%
Total white varieties	1,397	14	2	12	1,425	1%
Unknown variety	17	0	0	0	17	0%
Rootstock Block	1	0	0	0	1	0%
Total all varieties	4,896	55	43	56	5,050	1%

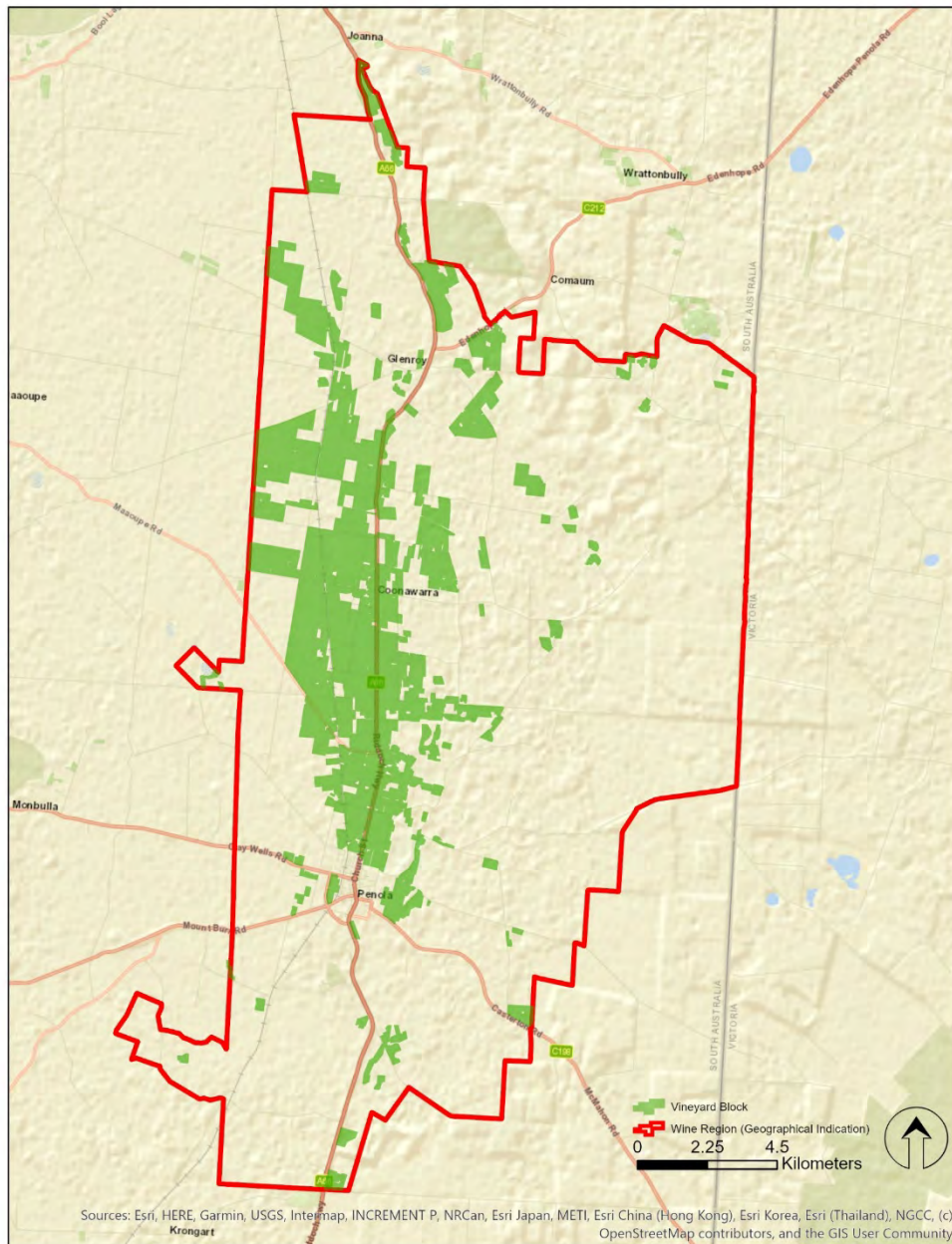
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2020

Regional Summary Report

Coonawarra Wine Region

Wine Australia July 2020



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 29 November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Coonawarra
Wine Region



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Coonawarra

Vintage overview

VINTAGE REPORT

The 2020 vintage in Coonawarra can be characterised by small quantities of high quality fruit.

The season began well with ideal soil moisture due to good rainfall between May and September. Coonawarra has been very fortunate not to have been affected by the bush fires that occurred throughout the Australian 2019/2020 summer.

Across the region, yields are reportedly down due to a cool Spring; however, the fruit is looking fantastic – small berries, great fruit concentration and lovely tannins.

Across the region, whites were picked in March, with the first of the reds coming off the vines late March to the beginning of April.

Warm days and cool nights provided the perfect ripening conditions for Coonawarra's signature variety, Cabernet Sauvignon, which was harvested in mid-April. The average picking date across the Coonawarra wine region is 15 April and – at time of writing - many are out in the vineyards harvesting with vintage expected to be complete by the end of April.

The 2020 Coonawarra vintage has been free of disease, drought, and smoke taint.

The wines at this early stage are looking excellent and 2020 will be a vintage to watch out for!

Coonawarra Vignerons Board (Coonawarra Grape and Wine Incorporated), April 2020

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Coonawarra winegrapes was 26,240 tonnes in 2020, down by 30 per cent from the 2019 reported crush of 37,242 tonnes. It was the lowest recorded crush for the region since 2014. Over the past five years (up to 2019), the average crush for Coonawarra has been 33,279 tonnes, making this year's crush 21 per cent below the five-year average.

There were 36 respondents to the survey who reported crushing grapes from Coonawarra in 2020, compared with 41 in 2019.

The total estimated value of Coonawarra winegrapes in 2020 was just under \$44 million compared with \$54 million in 2019. The lower production was partly offset by a 16 per cent increase in the average purchase value of grapes, from \$1484 in 2019 to \$1723 per tonne.

There were increases in average prices for the three largest varieties: Cabernet Sauvignon up by 8 per cent to \$1863 per tonne, Shiraz up 17 per cent to \$1701 per tonne and Merlot up by 26 per cent to \$1296 per tonne.

The price dispersion data for red varieties shows a big upward shift in prices paid, with 83 per cent of reds being purchased at \$1500 per tonne and above, compared with 57 per cent in 2019. For white varieties, 98 per cent of white grapes purchased at between \$600 and \$1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in Coonawarra as at 30 April 2020 is 5846 hectares, a net increase of 120 hectares compared with 2019, and around 700 hectares more than it was 5 years ago.

There were 215 hectares of new vines planted in the region in the 2019-20 season (including top-working and replacements), with almost all of them being Cabernet Sauvignon.

Coonawarra

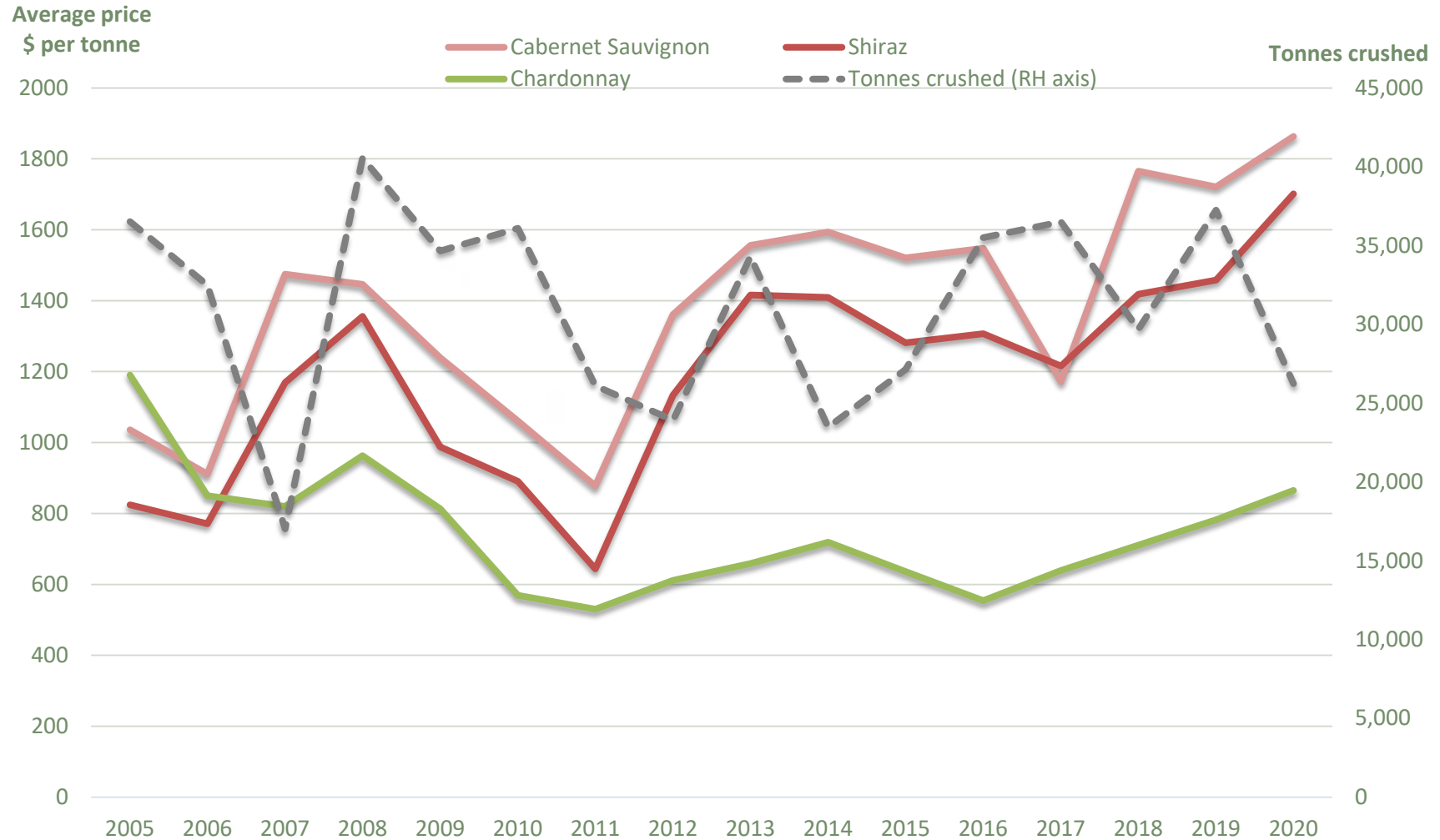
Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Barbera										6	100%	6	\$9,816
Cabernet Franc	19			4	14					51	73%	69	\$99,932
Cabernet Sauvignon	5,797			465	3,912	1,419	\$10,799,663	\$1,863	8%	8,644	60%	14,441	\$26,904,961
Malbec	7					7				34	84%	41	\$105,976
Merlot	540			416	120	4	\$699,369	\$1,296	26%	1,561	74%	2,101	\$2,722,052
Nebbiolo	5					5					0%	5	\$13,468
Petit Verdot	58			6	52					291	83%	349	\$489,420
Pinot Meunier										2	100%	2	\$3,965
Pinot Noir	86			42	44		\$109,896	\$1,277	35%	127	60%	213	\$271,503
Shiraz	1,017			349	533	135	\$1,730,271	\$1,701	17%	5,193	84%	6,210	\$10,564,727
Tempranillo										2	100%	2	\$2,983
Other red	4			4						0	4%	4	\$3,488
Red total	7,533			1,288	4,675	1,570	\$13,482,057	\$1,790	14%	15,910	68%	23,443	\$41,192,291
White													
Chardonnay	397			390	7		\$343,788	\$865	11%	1,024	72%	1,421	\$1,229,452
Gewurztraminer	1			1						12	92%	13	\$11,250
Pinot Gris/Grigio	13			13							0%	13	\$13,100
Riesling										268	100%	268	\$367,739
Sauvignon Blanc	199			191	8		\$209,294	\$1,052	46%	684	77%	883	\$928,697
Semillon	22			22						167	89%	189	\$132,398
Other white										11	100%	11	\$18,864
White total	632			617	15		\$582,299	\$921	21%	2,165	77%	2,797	\$2,701,501
Grand total	8,165			1,905	4,690	1,570	\$14,064,356	\$1,723	16%	18,076	69%	26,240	\$43,893,792

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Franc	21	1	0	4	26	15%
Cabernet Sauvignon	3,534	14	16	207	3,771	5%
Malbec	18	0	0	0	18	0%
Merlot	356	0	0	4	360	1%
Petit Verdot	17	0	0	0	17	0%
Pinot Noir	36	0	0	0	36	0%
Shiraz	1,161	0	6	0	1,167	0%
Other Red	7	3	2	0	12	0%
Total red varieties	5,150	18	24	215	5,407	4%
White winegrapes						
Chardonnay	256	0	3	0	259	0%
Riesling	45	0	0	0	45	0%
Sauvignon Blanc	91	0	0	0	91	0%
Semillon	12	0	0	0	12	0%
Other White	11	0	0	0	11	0%
Total white varieties	415	0	3	0	418	0%
Unknown variety	21	0	0	0	21	0%
Total all varieties	5,586	18	27	215	5,846	4%

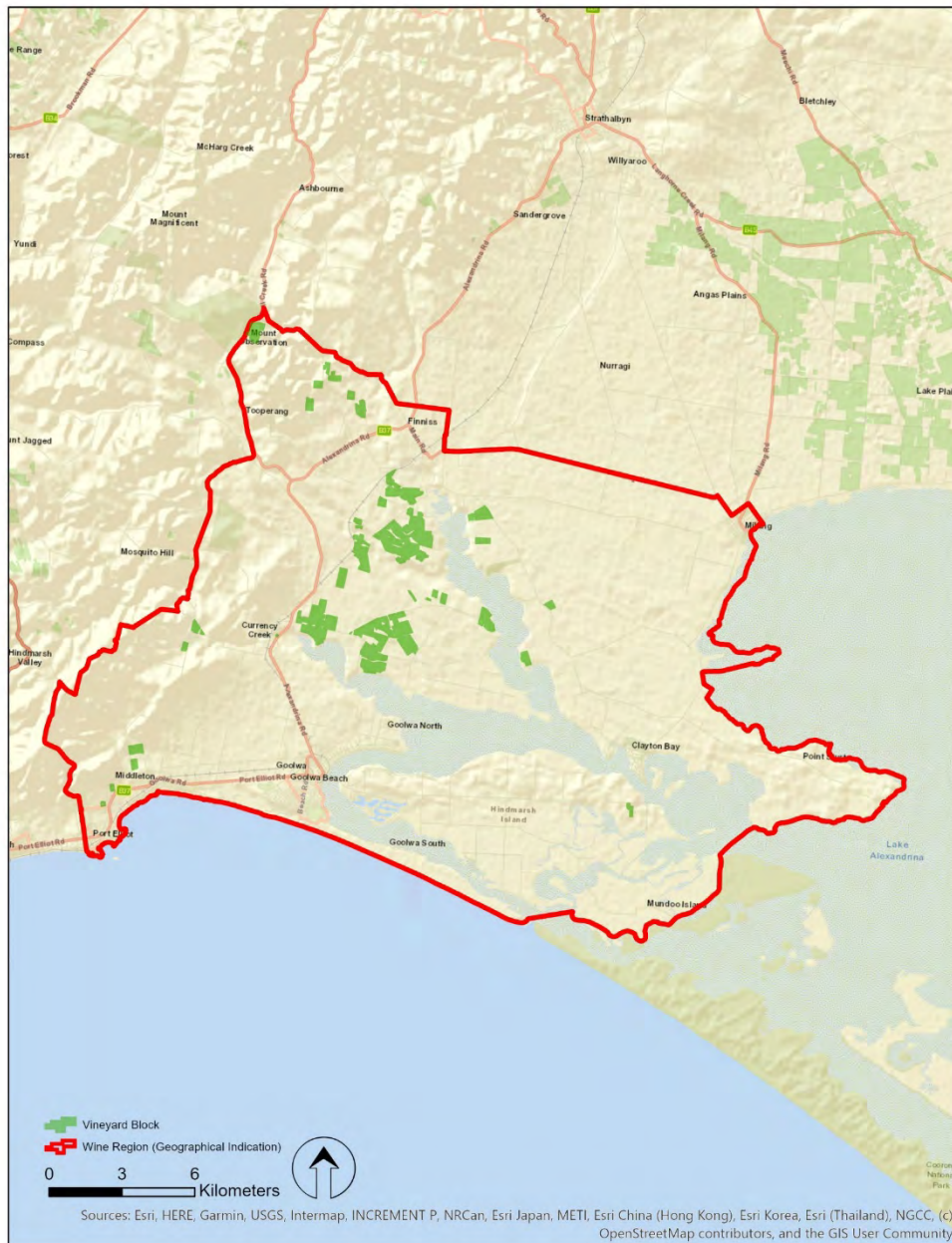
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2020

Regional Summary Report

Currency Creek Wine Region

Wine Australia July 2020



Currency Creek Wine Region



Currency Creek

Vintage overview

VINTAGE REPORT

A return to average winter rains in 2019, together with cool spring conditions, led to strong early spring growth and bunch numbers across all varieties.

The early summer remained cool, with above average shower activity which had some impact on fruit set, and resulting yield, ranging from minimal impact on white varieties, some impact on shiraz, to significant impact on some cabernet sauvignon blocks.

The cooler moist weather continued until December 20th - 28th when strong, intermittent, hot northerly winds persisted through out the region. This was immediately followed by significant rain and a return to a cooler vintage, enabling the harvest of whites in mid February and reds completed by 20th April.

Although the weather in the lead up to harvest was somewhat more unstable than average, some exceptional fruit characteristics were found in white varieties given time to balance, in particular, sauvignon blanc, pinot gris and chardonnay.

The red varieties also took some time to balance fruit acid and sugar ripeness, as always patience was rewarded and later picked parcels of more physiological ripeness are showing both strong varietal definition and significant fruit weight.

2020 district yields remained variable between varieties and blocks, but in general were less than in previous averages.

Nathan Shaw – President

Currency Creek Wine Region Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Currency Creek winegrapes was 3189 tonnes in 2020, up by 2 per cent compared with the 2019 reported crush of 3139 tonnes. It was the second lowest recorded crush since 2007, when crush data was first collected for the region. Over the past five years (up to 2019), the average crush for Currency Creek has been 7058 tonnes, making this year's crush 55 per cent below the five-year average.

There were 17 respondents to the survey who reported crushing grapes from Currency Creek in 2020, compared with 12 in 2019. This increase may account for some of the apparent increase in the reported crush.

The total estimated value of Currency Creek winegrapes in 2020 was just under \$4 million compared with \$3.2 million in 2019 – a 25 per cent increase. The slight increase in production was enhanced by an overall rise in the average purchase value of grapes, which increased by 16 per cent from \$1101 in 2019 to \$1279 per tonne.

The average value of Shiraz increased by 15 per cent to \$1360 per tonne, while the average value of Cabernet Sauvignon increased by 10 per cent to \$1287 per tonne.

The price dispersion data shows that approximately two-thirds of red grapes and 100 per cent of white grapes were purchased at between \$600 and \$1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in Currency Creek as at 30 April 2020 is 991 hectares, with no new plantings for the past four years. The total area is around 30 hectares more than it was 5 years ago.

Currency Creek

Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Cabernet Sauvignon	251			170	81		\$322,761	\$1,287	10%	486	66%	737	\$948,211
Durif										103	100%	103	\$137,861
Grenache										42	100%	42	\$87,204
Malbec										8	100%	8	\$10,814
Merlot	28			28						201	88%	229	\$137,130
Petit Verdot										20	100%	20	\$22,619
Pinot Noir	10			10						19	65%	29	\$33,097
Sangiovese	13				13						0%	13	\$19,770
Shiraz	1,021			585	421	15	\$1,388,409	\$1,360	15%	475	32%	1,496	\$2,033,946
Tempranillo	9				9						0%	9	\$13,830
Red total	1,332			793	524	15	\$1,773,029	\$1,331	15%	1,353	50%	2,685	\$3,444,483
White													
Chardonnay	29			29						39	57%	69	\$65,823
Gewurztraminer										74	100%	74	\$66,197
Pinot Gris/Grigio	43			43							0%	43	\$44,440
Prosecco	12			12							0%	12	\$17,531
Sauvignon Blanc	86			86			\$56,294	\$658		202	70%	288	\$189,082
Vermentino	19			19							0%	19	\$25,970
White total	189			189			\$172,248	\$913	16%	316	63%	504	\$409,043
Grand total	1,521			981	524	15	\$1,945,276	\$1,279	16%	1,668	52%	3,189	\$3,853,526

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet 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 varieties	750	0	0	0	750	0%
White winegrapes						
Chardonnay	122	0	0	0	122	0%
Pinot Gris	31	0	0	0	31	0%
Sauvignon Blanc	56	0	0	0	56	0%
Semillon	7	0	0	0	7	0%
Viognier	2	0	0	0	2	0%
Other White	20	0	0	0	20	0%
Total white varieties	238	0	0	0	238	0%
Unknown variety	3	0	0	0	3	0%
Total all varieties	991	0	0	0	991	0%

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2020

Regional Summary Report

Fleurieu other Inc Southern Fleurieu and Kangaroo Island

Wine Australia July 2020



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
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 870 hectares.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Fleurieu other was 2920 tonnes in 2020, down by 15 per cent compared with the 2019 reported crush of 3452 tonnes. Over the past five years (up to 2019), the average crush for Fleurieu other has been 3478 tonnes, making this year's crush 16 per cent below the five-year average.

There were 24 respondents to the survey who reported crushing grapes from Fleurieu other in 2020, compared with 27 in 2019.

The total estimated value of winegrapes from Fleurieu other in 2020 was \$3.2 million compared with \$3.3 million in 2019 – a 5 per cent decrease. The decrease in production was partly offset by an overall increase in the average purchase value of grapes, which increased by 11 per cent from \$976 in 2019 to \$1081 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up by 7 per cent to \$1249 per tonne, Sauvignon Blanc up 30 per cent to \$990 per tonne and Pinot Gris/Grigio up by 17 per cent to \$986 per tonne.

The price dispersion data shows a narrow range of purchase prices, with 92 per cent of red grapes and 88 per cent of white grapes purchased at between \$600 and \$1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in Fleurieu other as at 30 April 2020 is 870 hectares, with few new plantings for the past four years. The total area is around 80 hectares less than it was 5 years ago.

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+							
Red													
Cabernet Franc	0										0%	0	\$385
Cabernet Sauvignon	198			171		27	\$276,042	\$1,393	9%	74	27%	272	\$379,094
Grenache													\$0
Malbec	2			2							0%	2	\$2,016
Merlot	62			52	10		\$77,033	\$1,242	27%	10	14%	72	\$89,204
Pinot Noir	98			81		17			-100%	4	3%	101	\$155,714
Shiraz	931			891	10	30	\$1,162,784	\$1,249	7%	57	6%	987	\$1,233,564
Tempranillo	18			2		16	\$36,672	\$2,033	-9%		0%	18	\$36,672
Red Total	1,309			1,199	19	90	\$1,705,153	\$1,303	7%	144	10%	1,453	\$1,896,648
White													
Chardonnay	268		17	251			\$193,777	\$724	15%	11	4%	278	\$201,377
Muscat Gordo Blanco	95		95								0%	95	\$38,128
Pinot Gris/Grigio	429			429			\$422,933	\$986	17%	15	3%	444	\$437,518
Prosecco	68			68							0%	68	\$51,120
Riesling	25		25							12	33%	37	\$18,680
Sauvignon Blanc	389			369	20		\$385,460	\$990	30%	70	15%	459	\$454,639
Semillon	70			70						9	11%	79	\$67,117
Other white										6	100%	6	\$10,535
White Total	1,345		137	1,187	20		\$1,163,747	\$865	23%	122	8%	1,467	\$1,279,113
Grand Total	2,653		137	2,386	40	90	\$2,868,846	\$1,081	11%	266	9%	2,920	\$3,175,761

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	70	0	8	0	78	0%
Merlot	35	0	0	0	35	0%
Pinot Noir	25	0	0	0	25	0%
Shiraz	117	8	6	6	137	4%
Other Red	4	0	0	0	4	0%
Total red varieties	251	8	14	6	279	2%
White winegrapes						
Chardonnay	77	0	0	0	77	0%
Pinot Gris	23	0	0	1	24	4%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	66	0	0	0	66	0%
Semillon	13	0	0	0	13	0%
Viognier	9	0	0	0	9	0%
Other White	8	0	0	1	9	11%
Total white varieties	199	0	0	2	201	1%
Unknown variety	3	0	0	0	3	0%
Total all varieties	453	8	14	8	483	2%

Source:
Vinehealth
Australia

Fleurieu other

Current plantings by variety and year planted – Kangaroo Island

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	41	2	0	0	43	0%
Merlot	4	0	0	0	4	0%
Shiraz	46	0	0	0	46	0%
Other Red	8	2	0	0	10	0%
Total red varieties	104	4	0	0	108	0%
White winegrapes						
Chardonnay	8	2	0	0	10	0%
Riesling	2	0	0	0	2	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other White	5	0	0	0	5	0%
Total white varieties	24	2	0	0	26	0%
Unknown variety	17	0	0	0	17	0%
Total all varieties	145	6	0	0	151	0%

Source:
Vinehealth
Australia

Fleurieu other

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	36	0	0	0	36	0%
Shiraz	92	0	0	0	92	0%
Other Red	4	0	0	0	4	0%
Total red varieties	132	0	0	0	132	0%
White winegrapes						
Chardonnay	29	0	0	0	29	0%
Pinot Gris	16	0	0	0	16	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	6	0	4	0	10	0%
Total white varieties	64	0	4	0	68	0%
Unknown variety	36	0	0	0	36	0%
Total all varieties	232	0	4	0	236	0%

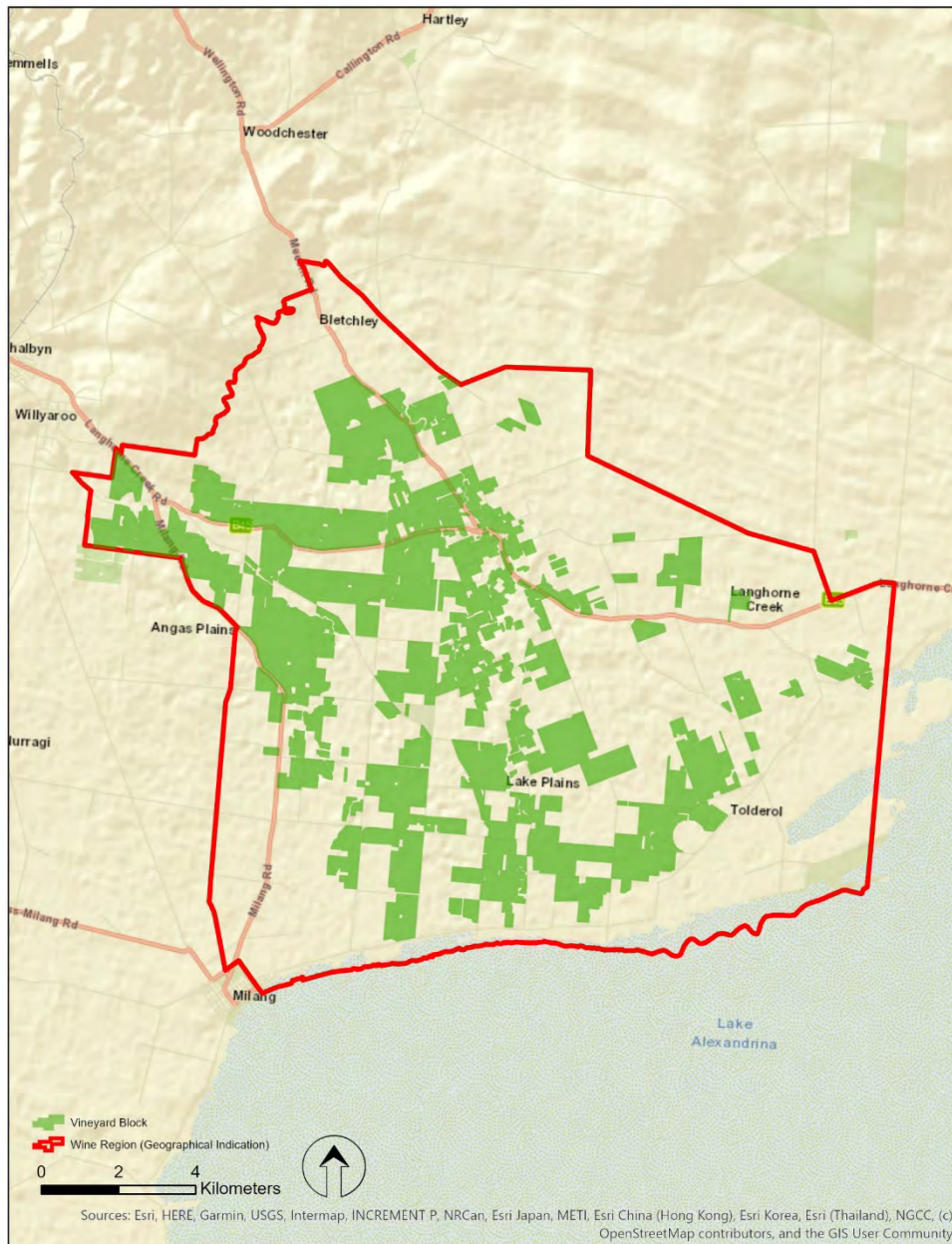
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2020

Regional Summary Report

Langhorne Creek Wine Region

Wine Australia July 2020



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Langhorne Creek
Wine Region



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Langhorne Creek

Vintage overview

VINTAGE REPORT

The Langhorne Creek rainfall for 2019 (276mm) was again well below average (LTA 384mm), very similar to last year and the rest of the country. Winter and spring rainfall were particularly low, and all months after August were drier than average until approximately 60mm fell over a two-day period starting on the last day of January. Fortunately, this did not result in any significant berry splitting in Langhorne Creek.

Langhorne Creek experienced frosts and crop losses during spring in various vineyards including along the Bremer River which is very unusual for the region. The flowering period was particularly dry and mostly cool, however two days over 38°C in late November caused major damage to flowering bunches. This period was also overcast and windy with some vineyards taking over a month to complete flowering. December and January were particularly dry and hot, but after the rainfall in early February the region experienced a very cool ripening period. The February maximum was a mere 32°C. The cool conditions certainly maintained natural acidity in the grapes and most fruit was harvested with higher than average malic acid levels and bright fruit flavours particularly in reds. With low volumes the wines will see some high skin to juice ratios resulting in great structure.

The harvest started on the 6th of February and followed a similar pattern to last year but with an increased focus later in the season; the later ripening and larger Cabernet crops in 2020 (Shiraz was stronger in 2019) filling the mostly empty wineries from mid-March.

The dry, drawn out and adverse flowering period led to low crops in many blocks. Intake across the region was lower than average with Malbec and Shiraz seemingly the hardest hit of the local reds.

Another compressed, but trouble-free harvest with excellent wine quality; the better wines are particularly good, with well-defined tannins, bright acidity and a generous palate.

Lian Jaensch – Langhorne Creek Grape and Wine Incorporated

(With thanks to winemakers Paul Hotker, Sam Watkins and Rebecca Willson)

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Langhorne Creek was 24,286 tonnes in 2020, down by 44 per cent compared with the 2019 reported crush of 43,137 tonnes. Over the past five years (up to 2019), the average crush for Langhorne Creek has been 49,186 tonnes, making this year's crush 51 per cent below the five-year average.

There were 49 respondents to the survey who reported crushing grapes from Langhorne Creek in 2020, compared with 47 in 2019.

The total estimated value of winegrapes from Langhorne Creek in 2020 was \$27.3 million compared with \$45 million in 2019. The decrease in production was partly offset by an overall increase in the average purchase value of grapes, which increased by 8 per cent from \$1051 per tonne in 2019 to \$1137 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up by 4 per cent to \$1248 per tonne, Cabernet Sauvignon up 7 per cent to \$1212 per tonne and Merlot up by 11 per cent to \$992 per tonne.

The price dispersion data shows a narrow range of purchase prices, with 97 per cent of red grapes and 87 per cent of white grapes purchased at between \$600 and \$1500 per tonne.

According to Vinehealth Australia data, the total vineyard area in Langhorne Creek as at 30 April 2020 is 5924 hectares, compared with 5959 hectares in 2019. The total area is around 100 hectares more than it was 5 years ago.

There were 28 hectares of new plantings in Langhorne Creek in the 2019-20 planting season, 19 of which were Cabernet Sauvignon.

Langhorne Creek

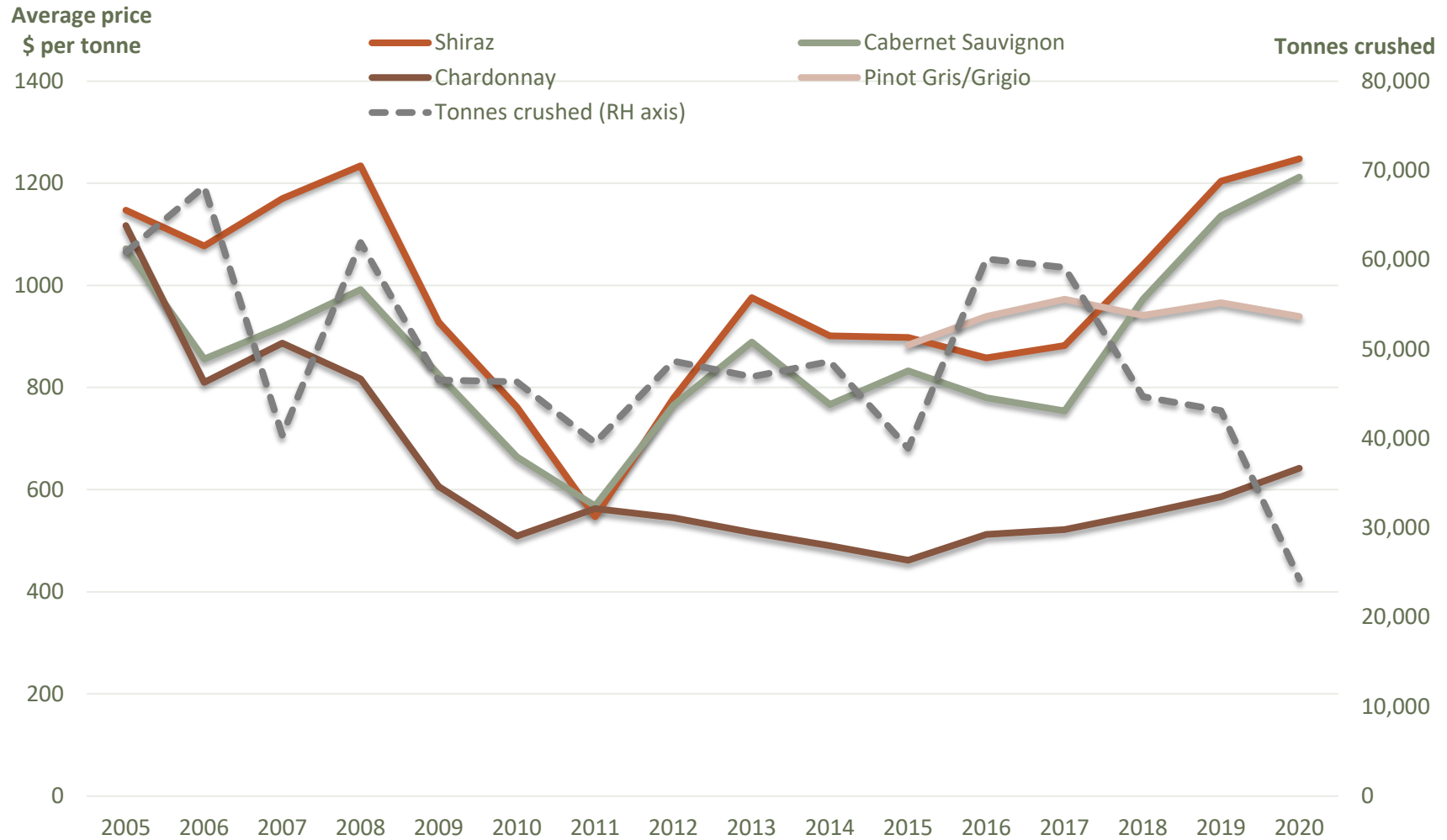
Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Barbera	3			3							0%	3	\$3,105
Cabernet Franc										7	100%	7	\$11,538
Cabernet Sauvignon	5,380			5,242	98	40	\$6,521,767	\$1,212	7%	1,673	24%	7,054	\$8,550,111
Durif	4			4						90	95%	94	\$89,661
Graciano										2	100%	2	\$4,555
Grenache	61			61			\$53,668	\$881	22%	444	88%	505	\$444,562
Lagrein	7			7							0%	7	\$5,822
Malbec	184			165	17	2	\$236,497	\$1,283	7%	23	11%	207	\$265,761
Mataro/Mourvedre	3			3						2	43%	6	\$4,488
Merlot	1,221			1,221			\$1,212,121	\$992	11%	611	33%	1,833	\$1,818,703
Montepulciano										2	100%	2	\$4,474
Petit Verdot	43			43			\$44,106	\$1,035		11	20%	54	\$55,396
Pinot Meunier	18			18							0%	18	\$14,080
Pinot Noir	396			396			\$389,117	\$983	22%	160	29%	555	\$545,983
Sangiovese	88			88			\$106,304	\$1,202		5	5%	93	\$112,075
Shiraz	7,873			7,655	162	57	\$9,824,090	\$1,248	4%	2,057	21%	9,930	\$12,390,651
Tempranillo	2			2						3	60%	5	\$4,072
Touriga Nacional	12				12						0%	12	\$21,833
Other red	55			55			\$43,777	\$799	5%		0%	55	\$43,777
Red total	15,352			14,963	289	99	\$18,484,617	\$1,204	6%	5,091	25%	20,443	\$24,390,646
White													
Chardonnay	1,535		305	1,230			\$985,720	\$642	10%	176	10%	1,711	\$1,098,710
Chenin blanc										2	100%	2	\$1,856
Fiano	7				7					4	39%	11	\$18,629
Gewurztraminer										146	100%	146	\$129,882
Muscat a petits grains blancs										11	100%	11	\$11,681
Pinot Gris/Grigio	304			304			\$285,164	\$939	-3%	65	18%	368	\$345,893
Riesling	46			46						673	94%	719	\$575,240
Sauvignon Blanc	498			498			\$389,184	\$781	5%	295	37%	793	\$619,311
Verdelho										44	100%	44	\$42,490
Vermentino	5			5						2	29%	7	\$5,432
Viognier	32			32							0%	32	\$20,579
White total	2,426	-	305	2,114	7	-	\$1,732,795	\$714	12%	1,417	37%	3,844	\$2,869,704
Grand total	17,778	-	305	17,077	296	99	\$20,217,368	\$1,137	8%	6,508	27%	24,286	\$27,260,350

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

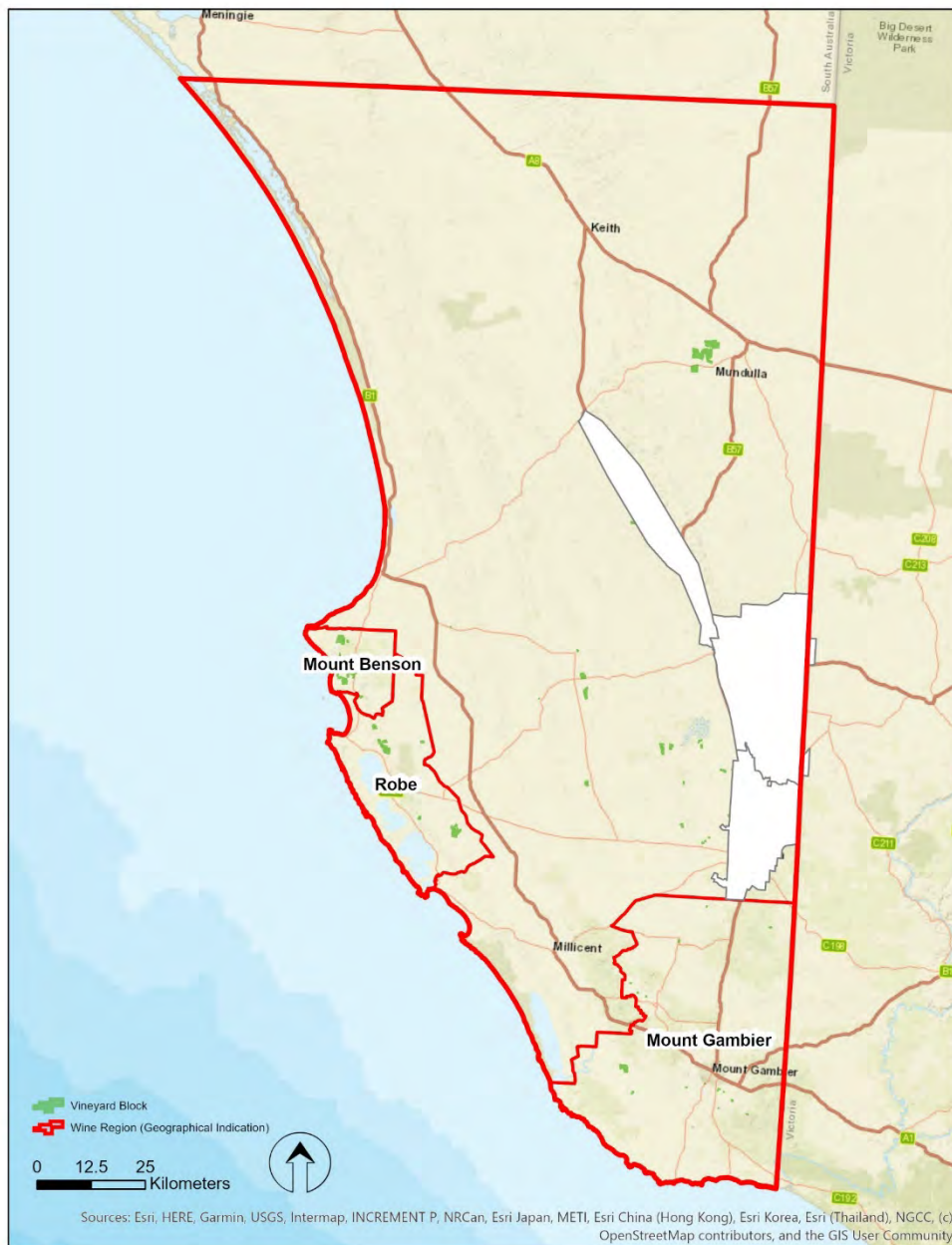


Langhorne Creek

Current plantings by variety and year planted

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Franc	8	0	0	0	8	0%
Cabernet Sauvignon	1,932	6	21	19	1,978	1%
Dolcetto	8	0	0	0	8	0%
Grenache	78	0	0	0	78	0%
Lagrein	10	0	0	0	10	0%
Malbec	100	3	0	0	103	0%
Merlot	372	0	0	0	372	0%
Nebbiolo	7	0	0	0	7	0%
Petit Verdot	9	0	0	0	9	0%
Sangiovese	15	0	0	0	15	0%
Shiraz	2,218	7	58	7	2,290	0%
Other Red	148	2	0	0	150	0%
Total red varieties	4,905	18	79	26	5,028	1%
White winegrapes						
Chardonnay	477	0	0	0	477	0%
Pinot Gris	50	0	0	0	50	0%
Riesling	160	0	0	0	160	0%
Sauvignon Blanc	75	0	0	0	75	0%
Semillon	4	0	0	0	4	0%
Verdelho	10	0	0	0	10	0%
Other White	58	0	0	2	60	3%
Total white varieties	834	0	0	2	836	0%
Rootstock Block	6	0	0	0	6	0%
Unknown variety	54	0	0	0	54	0%
Total all varieties	5,799	18	79	28	5,924	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2020

Regional Summary Report

**Limestone Coast
other**

**Inc Mount Benson,
Mount Gambier and
Robe**

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

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



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Wine Australia July 2020

Limestone Coast other

Vintage overview

Limestone Coast other includes the GI regions of Mount Benson, Mount Gambier and Robe, and the vineyards in the Limestone Coast zone but outside the declared GI regions of Padthaway, Coonawarra and Wrattobully – mainly around Bordertown, Lucindale, and Beachport. The total area of vines included in this definition is 3309 hectares.

VINTAGE REPORT

The grape growers and winemakers of the Mount Benson region have not been entirely immune to the events of 2020. Our season began with some issues early in the piece with poor weather over flowering and a very late spring frost (mid November) causing crop losses in many varieties. Sauvignon Blanc seemed to come through fruit set reasonably well however other varieties, Cabernet Sauvignon in particular, were hit quite badly. It is estimated that overall yields were approximately 60% down in red varieties with whites also yielding lower with a loss of about 30%.

Our ripening season then commenced with a warm to hot start which thankfully cooled into a much more mild January and early February. A lighting storm, which passed over the Mount Benson region on December 30 2019, ignited a bushfire in an area known as Keilira a mere 50km North East from our region. It was a true blessing that the Mount Benson vineyards escaped any associated smoke damage. One of the silver linings of the bushfires for our region was an increase in demand for fruit and new buyers for Mount Benson fruit.

As our season progressed additional challenges arose. The Mount Benson region is a highly maritime environment subject to sea fogs, which roll in and blanket the vineyards in the early mornings in March. In 2020 these fogs arrived in mid to late February, persisting for just on a week and bringing with them a higher disease pressure than normal for that period of ripening. However, with increased vigilance in the vineyard most growers were happy with the fruit condition at harvest. This year we also saw a nice strong Bonney Upwelling. With ocean temperatures dropping just as our harvest season commenced it allowed the region to have a longer cooler vintage with excellent retention of natural acid, a key driver of wine quality in this region.

While production is lower, the quality of fruit and the resultant wine seem at this stage to be excellent. In reds Shiraz has been a standout. Shiraz was not as affected by loss of yield and the bright acidity and freshness of fruit is marking this as a standout variety of the year. In white varieties Sauvignon Blanc looks very promising and Pinot Gris/Grigio also looks like a highlight for the year.

After everything that was thrown at Mount Benson and the wider industry in the 2020 season we are once again thankful for our consistent summers, secure access to water and the milder maritime conditions of our region. It is with true joy and intense pride that we say that this has been an overall successful and high quality vintage.

Anita Goode – Wangolina Station

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Limestone Coast other was 11,394 tonnes in 2020, down by 46 per cent compared with the 2019 reported crush of 21,162 tonnes. Over the past five years (up to 2019), the average crush for Limestone Coast other has been 18,957 tonnes, making this year's crush 40 per cent below the five-year average.

There were 28 respondents to the survey who reported crushing grapes from Limestone Coast other in 2020, compared with 31 in 2019.

The total estimated value of winegrapes from Limestone Coast other in 2020 was \$13.1 million compared with \$21.6 million in 2019. The average purchase value of grapes increased from \$1031 per tonne in 2019 to \$1170 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up by 7 per cent to \$1314 per tonne, Cabernet Sauvignon up 19 per cent to \$1294 per tonne and Chardonnay up by 16 per cent to \$907 per tonne.

According to Vinehealth Australia data, the total vineyard area in Limestone Coast other as at 30 April 2020 is 3309 hectares, compared with 3332 hectares in 2019. The total area is around 100 hectares less than it was 5 years ago.

The only new plantings in Limestone Coast other in the 2019-20 planting season were 27 hectares of Cabernet Sauvignon in Robe.

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+							
Red													
Cabernet Franc										61	100%	61	\$97,509
Cabernet Sauvignon	1,111			929	142	40	\$1,437,727	\$1,294	19%	1,998	64%	3,109	\$4,022,411
Malbec	90			90					-100%	33	27%	123	\$99,251
Mataro/Mourvedre	65			65						125	66%	190	\$142,380
Merlot	401			401			\$352,540	\$880	0%	909	69%	1,310	\$1,152,268
Montepulciano	9			2	7		\$12,153	\$1,311			0%	9	\$12,153
Petit Verdot	80			80			\$54,365	\$681		184	70%	264	\$179,756
Pinot Noir	125			102	23		\$174,287	\$1,394	20%	160	56%	285	\$397,798
Shiraz	1,320			924	353	42	\$1,734,581	\$1,314	7%	2,004	60%	3,324	\$4,369,066
Tempranillo										15	100%	15	\$24,948
Other red	33			33			\$30,652	\$939			0%	33	\$30,652
Red Total	3,233			2,626	525	82	\$3,917,645	\$1,212	11%	5,490	63%	8,723	\$10,528,190
White													
Chardonnay	311		20	259	32		\$282,176	\$907	16%	1,011	76%	1,323	\$1,199,093
Muscat a petits grains blancs	18			18							0%	18	\$16,623
Pinot Gris/Grigio	45			45			\$51,033	\$1,126	13%	19	29%	64	\$71,999
Prosecco	10				10						0%	10	\$16,448
Riesling													\$0
Sauvignon Blanc	582			582			\$643,325	\$1,105	23%	537	48%	1,120	\$1,236,934
Semillon	18			18					-100%	117	87%	135	\$80,824
Verdelho	1			1							0%	1	\$602
White Total	986		20	923	42		\$1,020,736	\$1,035	20%	1,685	63%	2,671	\$2,622,523
Grand Total	4,220		20	3,550	568	82	\$4,938,381	\$1,170	13%	7,174	63%	11,394	\$13,150,713

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	114	0	0	0	114	0%
Merlot	52	0	0	0	52	0%
Pinot Noir	2	0	0	0	2	0%
Shiraz	171	0	7	0	178	0%
Other Red	4	0	0	0	4	0%
Total red varieties	343	0	7	0	350	0%
White winegrapes						
Chardonnay	34	0	0	0	34	0%
Pinot Gris	43	0	0	0	43	0%
Sauvignon Blanc	66	0	0	0	66	0%
Other White	10	0	0	0	10	0%
Total white varieties	153	0	0	0	153	0%
Total all varieties	496	0	7	0	503	0%

Source:
Vinehealth
Australia

Limestone Coast other

Current plantings by variety and year planted – Mount Gambier

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	0%
Merlot	0	0	0	0	0	0%
Pinot Noir	67	0	0	0	67	0%
Shiraz	0	0	0	0	0	0%
Other Red	0	0	0	0	0	0%
Total red varieties	76	0	0	0	76	0%
White winegrapes						
Chardonnay	40	0	0	0	40	0%
Pinot Gris	14	0	0	0	14	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	95	0	0	0	95	0%
Semillon	1	0	0	0	1	0%
Total white varieties	155	0	0	0	155	0%
Unknown variety	20	0	0	0	20	0%
Total all varieties	251	0	0	0	251	0%

Source:
Vinehealth
Australia

Limestone Coast other

Current plantings by variety and year planted – Robe

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	225	0	39	27	291	9%
Merlot	36	0	0	0	36	0%
Pinot Noir	55	0	0	0	55	0%
Shiraz	170	0	0	0	170	0%
Other Red	5	0	0	0	5	0%
Total red varieties	491	0	39	27	557	5%
White winegrapes						
Chardonnay	107	0	0	0	107	0%
Pinot Gris	15	0	0	0	15	0%
Sauvignon Blanc	32	0	0	0	32	0%
Semillon	2	0	0	0	2	0%
Total white varieties	156	0	0	0	156	0%
Total all varieties	647	0	39	27	713	4%

Source:
Vinehealth
Australia

Limestone Coast other

Current plantings by variety and year planted – Bordertown

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	415	0	0	0	415	0%
Merlot	219	0	0	0	219	0%
Petit Verdot	43	0	0	0	43	0%
Shiraz	337	0	0	0	337	0%
Other Red	114	0	0	0	114	0%
Total red varieties	1,128	0	0	0	1,128	0%
White winegrapes						
Chardonnay	88	0	0	0	88	0%
Pinot Gris	12	0	0	0	12	0%
Sauvignon Blanc	8	0	0	0	8	0%
Semillon	7	0	0	0	7	0%
Other White	9	0	0	0	9	0%
Total white varieties	124	0	0	0	124	0%
Total all varieties	1,252	0	0	0	1,252	0%

Source:
Vinehealth
Australia

Limestone Coast other

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet 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 varieties	533	0	0	0	533	0%
White winegrapes						
Chardonnay	41	0	0	0	41	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other White	2	0	0	0	2	0%
Total white varieties	57	0	0	0	57	0%
Total all varieties	590	0	0	0	590	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2020

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2020

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

McLaren Vale Wine Region



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McLaren Vale

Vintage overview

VINTAGE REPORT

The McLaren Vale Wine Region experienced a drier than average growing season for the third year in a row. The continuation of dry conditions has contributed to generally low yields across the region.

Dry conditions during spring reduced the vigour of vines, while several days of very high winds in late November were seen to reduce the berry set of Cabernet Sauvignon and Tempranillo which were flowering at the time.

The summer of Vintage 2020 was a tale of two summers. Our “first” summer, the month of December, was the hottest on record.

December's hot weather had vines showing signs of water and heat stress much earlier in the season than they would typically but also suppressed Powdery and Downy Mildew and there were very low levels of disease this vintage.

Fortunately, to break the record hot weather, the northern Australian monsoon season started at the start of January, and temperatures over southern Australia dropped correspondingly. We had 13 consecutive days below 30°C from 15–27 January. This was the longest such run in January since 1992 and longest in summer since December 2008. The mean average temperatures were 1.2 °C below average.

The start of February saw a monsoonal rain band move over South Australia and the McLaren Vale Wine Region experienced 20-30mm during three days of thunderstorms. It was just enough summer rain to freshen up vineyards, without the unwanted side effect of berry splitting and then botrytis bunch rot.

This trend of cooler weather continued through February and it proved much cooler than average, with no maximum temperatures above 35°C for the first time. February is “normally” the hottest month.

Grape picking took 5 weeks to complete starting at full pace in the first week of March and ending at the start of April. The report from winemakers on wine quality has been good, with winemaking made easier by cool weather and lower tonnages allowing for close attention at the winery.

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

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from McLaren Vale was 28,751 tonnes in 2020, down by 13 per cent compared with the 2019 reported crush of 33,055 tonnes. Over the past five years (up to 2019), the average crush for McLaren Vale has been 36,590 tonnes, making this year's crush 21 per cent below the five-year average. Compared with the other major regions in SA, McLaren Vale had a relatively small reduction and reported a larger crush than the Barossa Valley and Langhorne Creek for the first time since 2004, and was second largest region by volume in the state in 2020.

There were 85 respondents to the survey who reported crushing grapes from McLaren Vale in 2020, compared with 84 in 2019.

The total estimated value of winegrapes from McLaren Vale in 2020 was \$56.5 million compared with \$59 million in 2019. The decrease in production was partly offset by an overall increase in the average purchase value of grapes, which increased by 10 per cent from \$1771 per tonne in 2019 to \$1951 per tonne.

There were increases in average prices for the three largest varieties: Shiraz up by 8 per cent to \$2107 per tonne, Cabernet Sauvignon up 12 per cent to \$1998 per tonne and Grenache up by 16 per cent to \$2156 per tonne. The average value of Grenache was higher than Shiraz for the first time.

The price dispersion data shows an upward shift in purchase prices, with 47 per cent of red grapes purchased at \$2000 per tonne and above, compared with 26 per cent last year.

According to Vinehealth Australia data, the total vineyard area in McLaren Vale as at 30 April 2020 is 7349 hectares, compared with 7337 hectares in 2019. The total area is around 100 hectares less than it was 5 years ago.

There were 55 hectares of new plantings (including top-working and replacements) in the 2019-20 planting season, the majority being Shiraz.

McLaren Vale

Winegrape intake summary table – red varieties

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Barbera	10				10					5	33%	15	\$29,115
Cabernet Franc	37				32	5	\$65,948	\$1,770	-3%	9	19%	46	\$81,381
Cabernet Sauvignon	2,817			126	1,216	1,476	\$5,628,610	\$1,998	12%	2,222	44%	5,039	\$10,069,009
Durif	15			2	5	8	\$27,225	\$1,862		7	31%	21	\$39,553
Graciano	13				6	7	\$25,581	\$1,954		16	55%	29	\$56,603
Grenache	1,121	2		94	384	639	\$2,416,066	\$2,156	16%	773	41%	1,894	\$4,082,692
Lagrein	3				3					3	44%	6	\$8,670
Malbec	16				10	6	\$29,698	\$1,859	13%	18	53%	34	\$62,711
Mataro/Mourvedre	293			14	179	100	\$548,231	\$1,868	11%	201	41%	494	\$922,912
Merlot	454			375	77	2	\$544,119	\$1,199	12%	346	43%	800	\$959,055
Montepulciano	9				6	3	\$15,318	\$1,779		5	36%	13	\$23,895
Nebbiolo	1					1				17	94%	18	\$55,305
Nero d'Avola	12					12	\$28,566	\$2,443	11%	13	53%	25	\$61,167
Petit Verdot	98			95	3		\$95,031	\$971	-7%	157	62%	255	\$247,898
Pinot Noir	264			247	17		\$306,260	\$1,162	7%		0%	264	\$306,260
Sangiovese	121				118	3	\$209,839	\$1,741	6%	81	40%	201	\$350,010
Shiraz	11,065			462	5,084	5,482	\$23,314,337	\$2,107	8%	5,828	34%	16,893	\$35,593,698
Tempranillo	105				76	29	\$192,802	\$1,833	0%	45	30%	150	\$275,590
Touriga Nacional	17				5	12	\$35,181	\$2,081	-8%	52	75%	69	\$143,544
Other red	53				15	38	\$102,315	\$1,938	19%	121	70%	174	\$337,150
Red Total	16,522	2		1,413	7,245	7,823	\$33,609,519	\$2,034	10%	9,918	38%	26,440	\$53,706,218

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

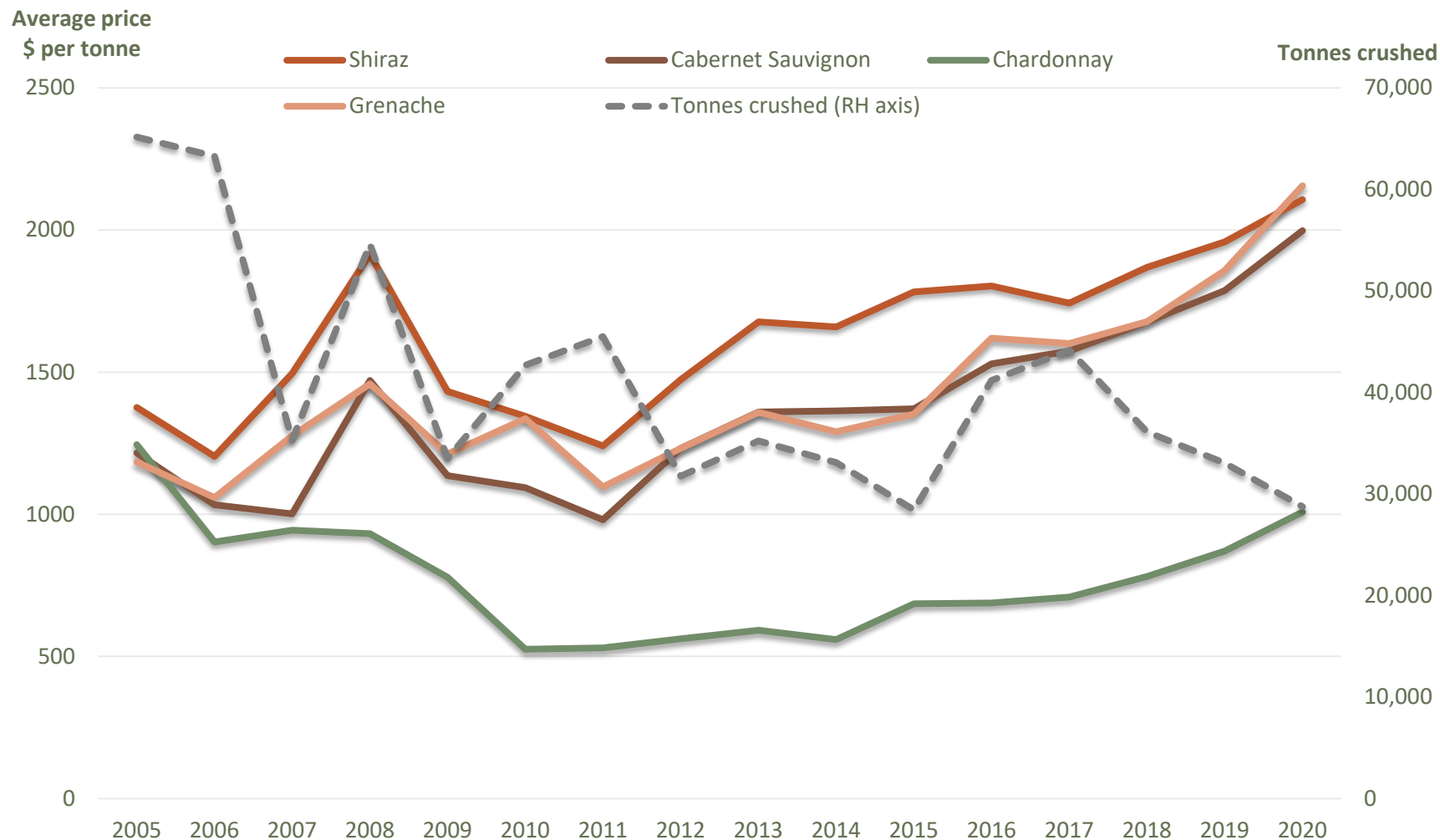
Winegrape intake summary table – white varieties

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
White													
Chardonnay	1,146			1,097	49		\$1,155,025	\$1,008	16%	252	18%	1,398	\$1,408,578
Chenin blanc	12			3	10				-100%	6	32%	18	\$26,677
Fiano	21				21		\$34,871	\$1,642	-3%	55	72%	76	\$125,325
Gewurztraminer	4			4							0%	4	\$5,052
Marsanne	24			24						14	37%	37	\$52,325
Muscat a petits grains blancs	66			54	12		\$77,551	\$1,183	-3%	6	9%	72	\$85,167
Pinot Gris/Grigio	14				14					112	89%	126	\$217,136
Prosecco	4			4							0%	4	\$4,843
Riesling	112			104	7		\$137,863	\$1,232		8	7%	120	\$147,767
Roussanne										27	100%	27	\$41,823
Sauvignon Blanc	63			63			\$71,305	\$1,135	-4%	39	38%	102	\$115,172
Semillon										13	100%	13	\$12,171
Verdelho	37			18	19				-100%	20	36%	57	\$77,177
Vermentino	26				15	11	\$73,338	\$2,805	74%	23	46%	49	\$136,478
Viognier	121			41	79		\$166,989	\$1,385	10%	51	30%	171	\$236,937
Other white	11				11				-100%	26	70%	37	\$55,148
White Total	1,660			1,412	236	11	\$1,868,702	\$1,125	12%	650	28%	2,311	\$2,747,774
Grand Total	18,183	2		2,825	7,481	7,835	\$35,474,904	\$1,951	10%	10,568	37%	28,751	\$56,453,991

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Barbera	11	0	0	0	11	0%
Cabernet Franc	23	0	0	0	23	0%
Cabernet Sauvignon	1,311	25	12	13	1,361	1%
Grenache	444	5	4	2	455	0%
Mataro (Mourvedre)	88	3	0	0	91	0%
Merlot	189	0	0	0	189	0%
Petit Verdot	45	0	0	0	45	0%
Pinot Noir	47	0	0	0	47	0%
Sangiovese	43	0	0	0	43	0%
Shiraz	4,006	62	57	29	4,154	1%
Tempranillo	58	4	0	0	62	0%
Other Red	118	10	3	4	135	3%
Total red varieties	6,383	109	76	48	6,616	1%
White winegrapes						
Chardonnay	281	0	2	0	283	0%
Chenin Blanc	15	0	0	0	15	0%
Marsanne	11	0	0	0	11	0%
Muscat A Petit Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris	23	0	0	0	23	0%
Riesling	32	0	0	0	32	0%
Sauvignon Blanc	46	0	0	0	46	0%
Semillon	18	0	0	0	18	0%
Verdelho	14	0	0	0	14	0%
Vernmentino	4	0	0	0	4	0%
Viognier	50	0	0	0	50	0%
Other White	43	2	0	7	52	13%
Total white varieties	547	2	2	7	558	1%
Rootstock Block	4	0	0	0	4	0%
Multi-purpose white	3	0	0	0	3	0%
Unknown variety	168	0	0	0	168	0%
Total all varieties	7,105	111	78	55	7,349	1%

Source:
Vinehealth
Australia

Padthaway

Vintage overview

VINTAGE REPORT

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

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

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

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

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

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

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

Leisha Munro – President

Padthaway Wine Region

OVERVIEW OF VINTAGE STATISTICS

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

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

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

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

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

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

Padthaway

Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Cabernet Franc	9			9						16	65%	25	\$25,350
Cabernet Sauvignon	2,226			1,901	297	29	\$2,880,622	\$1,294	1%	1,203	35%	3,430	\$4,437,410
Graciano										2	100%	2	\$3,585
Lagrein	2				2						0%	2	\$2,850
Malbec	53			53						146	73%	200	\$207,862
Merlot	286			286			\$255,593	\$895	12%	335	54%	621	\$555,706
Pinot Meunier										0	100%	0	\$906
Pinot Noir	483			480	3		\$541,290	\$1,122	32%	41	8%	524	\$587,406
Sangiovese	18					18					0%	18	\$40,342
Shiraz	2,475			1,669	504	302	\$3,539,941	\$1,430	7%	1,663	40%	4,138	\$5,917,598
Tempranillo	3					3				1	32%	5	\$11,600
Red total	5,555			4,398	806	352	\$7,333,026	\$1,320	6%	3,409	38%	8,964	\$11,790,615
White													
Chardonnay	2,820		303	2,517			\$1,957,276	\$694	6%	1,071	28%	3,890	\$2,700,654
Gewurztraminer	87			87						50	37%	137	\$88,940
Pinot Gris/Grigio	1,314			1,314			\$1,318,995	\$1,004	5%	102	7%	1,416	\$1,421,729
Riesling	497			497						467	48%	963	\$870,282
Sauvignon Blanc	774			774			\$650,880	\$841	3%	81	9%	855	\$718,966
Verdelho	28		28							103	79%	131	\$52,376
Vermentino										2	100%	2	\$3,380
Viognier	31			31						34	53%	65	\$65,110
Other white										5	100%	5	\$8,100
White total	5,549		330	5,219			\$4,474,305	\$806	8%	1,915	26%	7,465	\$5,929,538
Grand total	11,104		330	9,617	806	352	\$11,807,331	\$1,063	2%	5,324	32%	16,428	\$17,720,153

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

Padthaway

Current plantings by variety and year planted

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Franc	8	0	0	0	8	0%
Cabernet Sauvignon	914	68	67	52	1,101	5%
Malbec	78	0	0	0	78	0%
Merlot	169	0	0	0	169	0%
Pinot Noir	86	0	0	11	97	11%
Shiraz	1,157	31	26	13	1,227	1%
Other Red	10	0	0	0	10	0%
Total red varieties	2,422	99	93	76	2,690	3%
White winegrapes						
Chardonnay	773	0	0	0	773	0%
Pinot Gris	159	0	0	0	159	0%
Riesling	148	0	0	0	148	0%
Sauvignon Blanc	83	0	0	0	83	0%
Verdelho	19	0	0	0	19	0%
Viognier	19	0	0	0	19	0%
Other White	28	0	0	0	28	0%
Total white varieties	1,229	0	0	0	1,229	0%
Unknown variety	40	0	0	0	40	0%
Total all varieties	3,691	99	93	76	3,959	2%

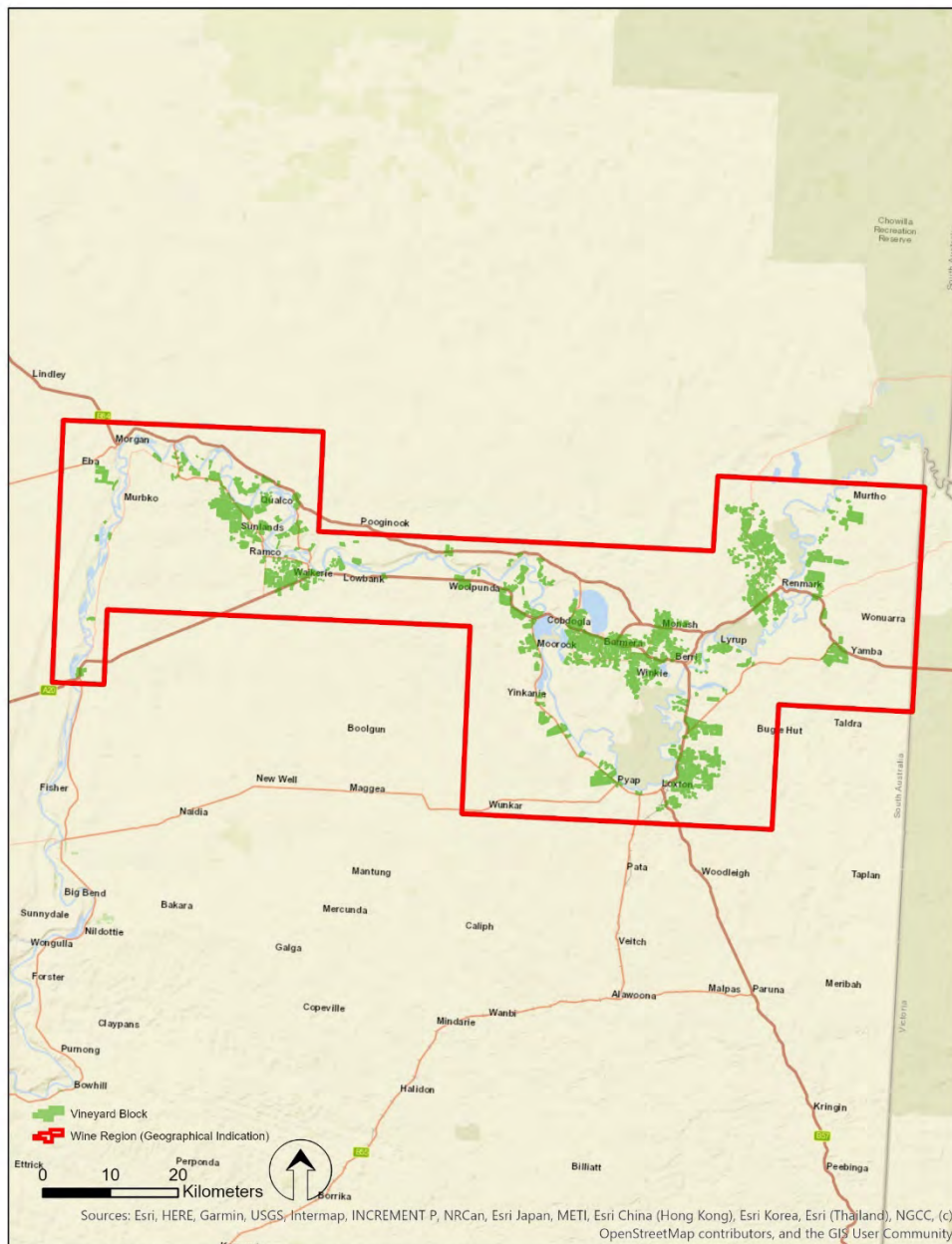
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2020

Regional Summary Report

Riverland Wine Region

Wine Australia July 2020



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: Esri ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

**Riverland
Wine Region**



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Riverland

Vintage overview

VINTAGE REPORT

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

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

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

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

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

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

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

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

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

Ian Macrae, CCW

Riverland

Vintage overview

OVERVIEW OF VINTAGE STATISTICS

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

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

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

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

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

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

Riverland

Winegrape intake summary table – red varieties

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red									0				
Barbera	19		7	12								19	\$12,117
Cabernet Franc	4		4							1	16%	5	\$2,609
Cabernet Sauvignon	54,429		30	54,355		44	\$37,968,075	\$698	15%	19,310	26%	73,739	\$51,437,889
Durif	740			738	2		\$555,674	\$751	10%	403	35%	1,143	\$857,910
Graciano	22		4	18			\$20,065	\$904	23%		0%	22	\$20,065
Grenache	3,745		348	3,370	27		\$2,410,137	\$643	25%	180	5%	3,926	\$2,526,039
Lagrein	17		5	7	5		\$21,389	\$1,234	55%	18	51%	35	\$43,464
Malbec	184		22	162						323	64%	507	\$302,819
Mataro/Mourvedre	1,977		10	1,931	36		\$1,333,106	\$674	33%	110	5%	2,087	\$1,406,991
Merlot	17,487		32	17,455			\$11,486,192	\$657	10%	10,699	38%	28,186	\$18,513,647
Montepulciano	82		46	36			\$63,350	\$776	35%	24	23%	106	\$82,344
Muscat a petits grains rouges	228		104	124					-100%		0%	228	\$134,928
Nebbiolo	9		1	8							0%	9	\$6,003
Nero d'Avola	4			3	2				-100%		0%	4	\$5,531
Petit Verdot	6,703		3,877	2,827			\$3,970,087	\$592	18%	6,525	49%	13,229	\$7,834,583
Pinot Noir	6,189		4,233	1,957			\$3,885,431	\$628	27%	980	14%	7,169	\$4,500,577
Ruby Cabernet	1,067		386	681			\$623,032	\$584	14%	1,270	54%	2,337	\$1,364,512
Sangiovese	52		36	16						516	91%	567	\$324,460
Shiraz	89,555		636	88,916	4		\$62,460,647	\$697	13%	30,085	25%	119,641	\$83,443,857
Tempranillo	834		350	483			\$543,166	\$651	20%	485	37%	1,319	\$859,104
Touriga Nacional	37		35	2			\$21,812	\$585		94	72%	131	\$76,601
Other red	1,482		245	1,231	6		\$965,147	\$651	22%	3,646	71%	5,128	\$3,339,014
Red total	184,868		10,410	174,331	82	44	\$126,627,420	\$685	15%	74,668	29%	259,536	\$177,095,063

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

Riverland

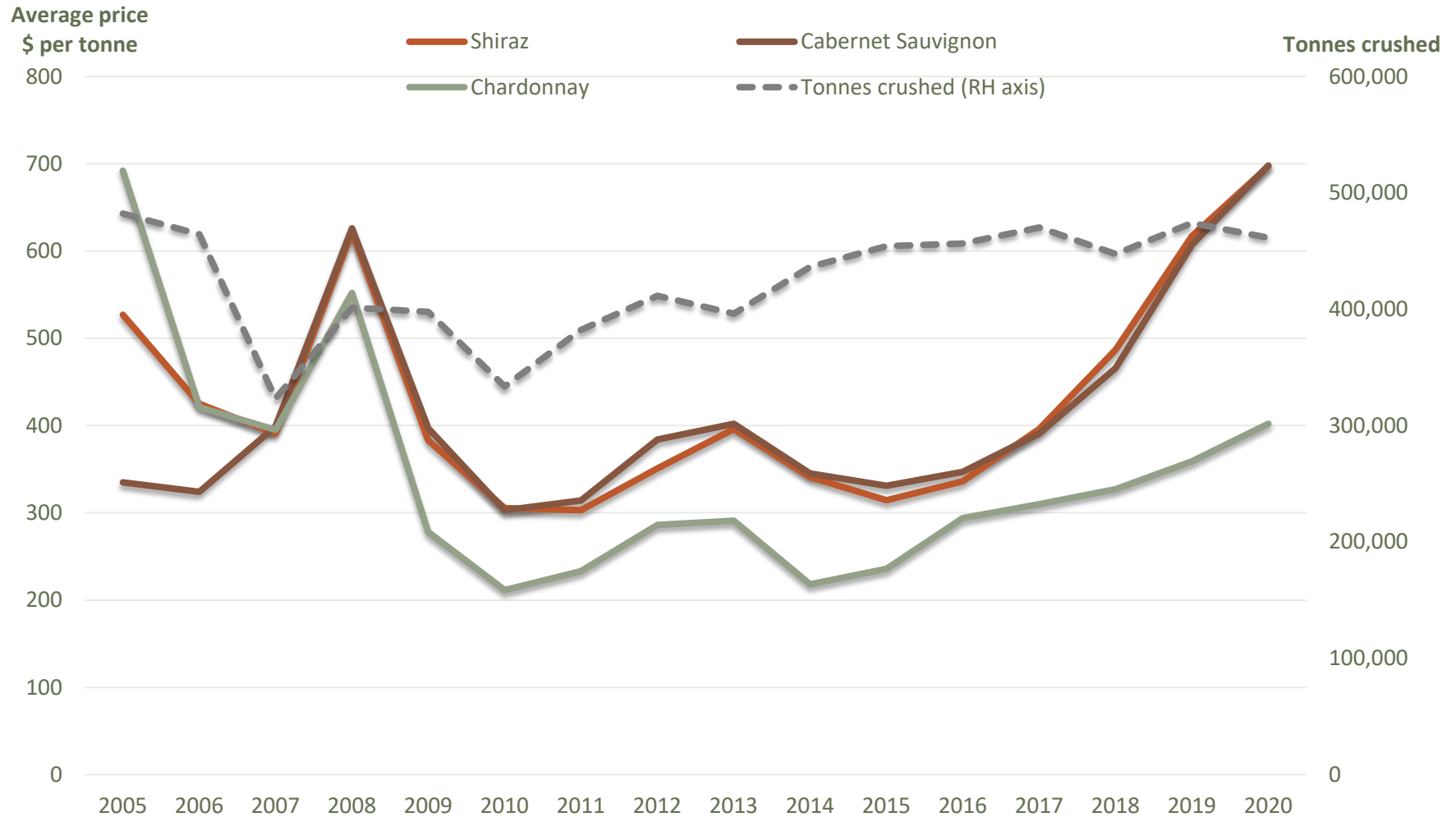
Winegrape intake summary table – white varieties

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
White													
Chardonnay	82,867		82,208	659			\$33,336,544	\$402	12%	20,510	20%	103,377	\$41,587,489
Chenin blanc	1,446	558	889				\$447,939	\$310	18%		0%	1,446	\$447,939
Colombard	20,453	1,236	19,217				\$6,214,434	\$304	16%	3,592	15%	24,045	\$7,305,848
Fiano	184		174	7	3		\$107,551	\$584	19%		0%	184	\$107,551
Gewurztraminer	920		920				\$347,116	\$377	3%	1,248	58%	2,168	\$818,238
Gruner Veltliner	3		1	0	2		\$3,425	\$1,088		134	98%	137	\$148,735
Marsanne	6			6							0%	6	\$5,088
Muscat a petits grains blancs	3,225	127	3,097				\$1,092,408	\$339	11%	607	16%	3,831	\$1,297,983
Muscat Gordo Blanco	19,073	421	18,653				\$6,008,133	\$315	22%	3,683	16%	22,756	\$7,168,324
Pinot Gris/Grigio	5,059		4,880	179			\$2,657,621	\$525	4%	1,284	20%	6,343	\$3,332,239
Prosecco	112			112							0%	112	\$107,038
Riesling	1,645		1,645				\$545,890	\$332	-2%	555	25%	2,200	\$730,066
Roussanne	4		4								0%	4	\$1,200
Sauvignon Blanc	16,238	25	16,069	145			\$7,479,882	\$461	8%	4,465	22%	20,703	\$9,536,759
Semillon	3,979	322	3,657				\$1,331,719	\$335	13%	4,773	55%	8,752	\$2,929,212
Verdelho	884	79	805				\$279,925	\$317	6%	754	46%	1,639	\$518,762
Vermentino	447		236	211			\$248,147	\$555	31%	190	30%	637	\$353,334
Viognier	1,558	468	884	204	2		\$679,620	\$436	8%	546	26%	2,104	\$917,989
Other white	1,115	1	1,079	31	4		\$411,060	\$369	26%	289	21%	1,404	\$517,618
White total	159,219	3,236	154,417	1,554	11		\$61,304,740	\$385	14%	42,631	21%	201,850	\$77,831,411
Grand total	344,087	3,236	164,827	175,886	93	44	\$187,932,160	\$546	16%	117,299	25%	461,385	\$254,926,475

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

Riverland

Historical weighted average price vs tonnes crushed



Riverland

Current plantings by variety and year planted – white varieties

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

Source:
Vinehealth
Australia

Riverland

Current plantings by variety and year planted – red varieties

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

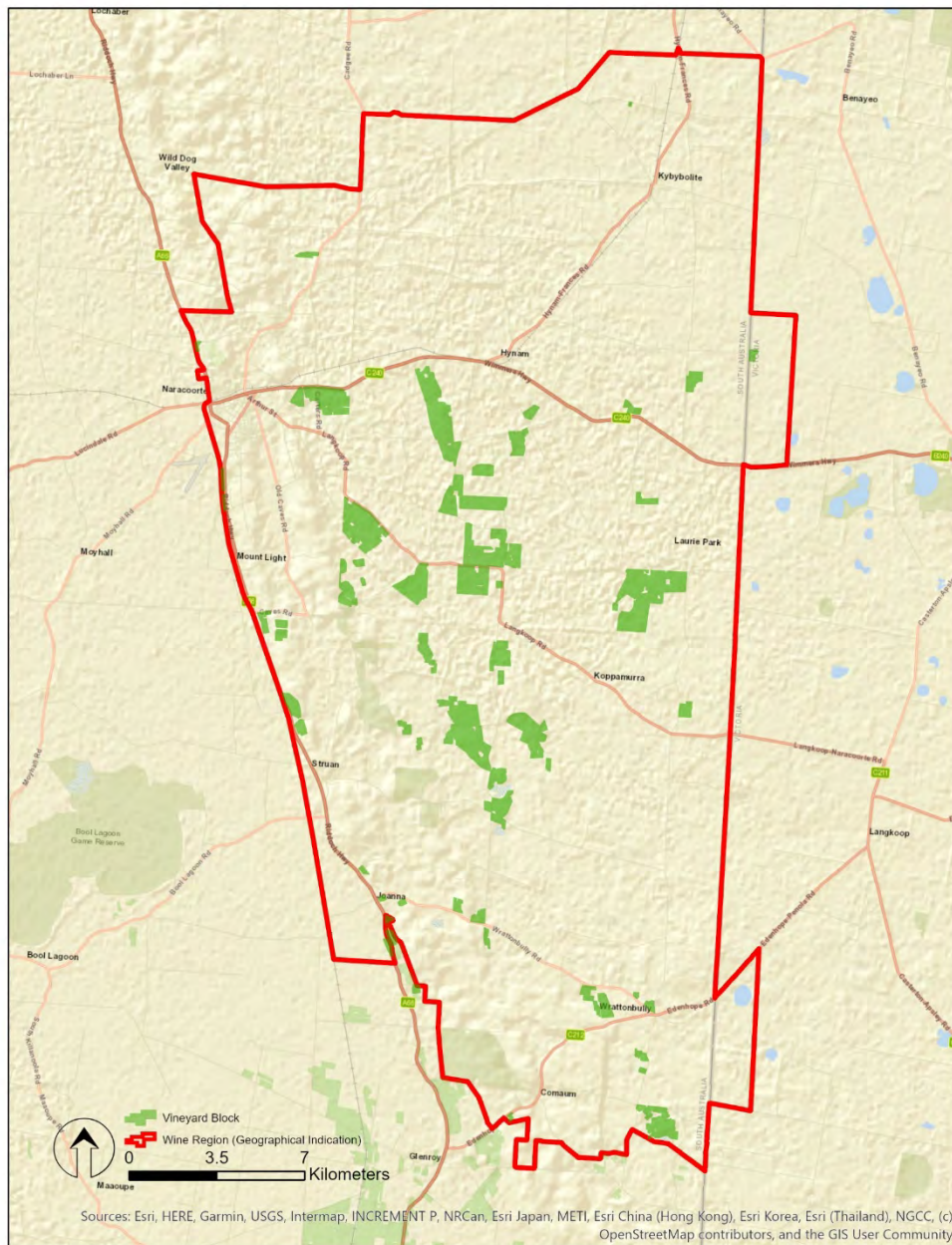
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2020

Regional Summary Report

Wrattonbully Wine Region

Wine Australia July 2020



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Wrattonbully
Wine Region



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Wrattonbully

Vintage overview

VINTAGE REPORT

The 2020 vintage will be remembered as a challenging season. It was dominated by fluctuating weather conditions between cool windy and extreme heat spikes, which has led to one of the lowest crops out of the region in recent times.

Coming out of winter was looking great with reasonable winter rainfall and near full soil moisture profiles. However, rainfall came to an abrupt halt during spring and the region moved to a pattern of mild to cool days with clear nights. This led to a high number of nights of frost and significant cold chilling of emerging buds, with the early emerging varieties Shiraz and Chardonnay being the most affected.

Mild and dry conditions continued throughout spring, allowing vine growth to progress at a steady pace with moderate vigour leading to great canopy balance. The mild conditions put the vine growth stages slightly behind average, with the majority of flowering occurring from late November to early December. Unfortunately, weather conditions deteriorated during this part of the season, with a return to cold and very windy conditions. This delayed and caused a long and drawn out flowering period and resulted in a very poor set in most varieties with Chardonnay and Cabernet Sauvignon being the most affected.

A week of extreme heat at the end of December put the vines, growers and their irrigations system under extreme pressure, but mild conditions returned in February and March which allowed for good even ripening of the fruit, with flavours, tannins and baumes developing well especially in Cabernet Sauvignon.

Harvesting of whites commenced in late February, a few weeks later than the past two seasons, but more in line with the long term average. Favourable weather conditions saw the whites develop strong varietal characters, and high crisp natural acidity. The cooler ripening conditions pushed the harvest of red varieties out and the bulk of the red harvest didn't start until April, with the majority complete by mid-April in ideal weather conditions.

Despite the tough season, the hard work and effort put in by the growers in the district has again paid dividends with very strong and varietal red wines being produced again this season - Cabernet Sauvignon being the standout.

Tim Fletcher – Chairperson, Wrattonbully Wine Region Association.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Wrattonbully was 12,372 tonnes in 2020, down by 50 per cent compared with the 2019 reported crush of 24,601 tonnes. Over the past five years (up to 2019), the average crush for Wrattonbully has been 21,068 tonnes, making this year's crush 41 per cent below the five-year average. It was the lowest crush reported since 2007.

There were 24 respondents to the survey who reported crushing grapes from Wrattonbully in 2020, compared with 25 in 2019.

The total estimated value of winegrapes from Wrattonbully in 2020 was \$17.1 million compared with \$30.2 million in 2019. The decrease in production was partly offset by an overall increase in the average purchase value of grapes, which increased by 9 per cent from \$1265 per tonne in 2019 to \$1379 per tonne.

There were increases in average prices for the three largest varieties: Cabernet Sauvignon up by 6 per cent to \$1550 per tonne, Shiraz up 9 per cent to \$1539 per tonne and Pinot Gris/Grigio up by 41 per cent to \$1269 per tonne.

The price dispersion data shows that there was an upward shift in prices, with 35 per cent of red tonnages purchased at \$1500 per tonne or above, compared with 23 per cent in 2019.

According to Vinehealth Australia data, the total vineyard area in Wrattonbully as at 30 April 2020 is 2732 hectares, compared with 2678 hectares in 2019 and around 60 hectares more than it was five years ago.

There were 114 hectares of new plantings (including top-working and replacements) in the 2019-20 planting season, the majority being Cabernet Sauvignon.

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													
Barbera	2				2						0%	2	\$3,278
Cabernet Franc										1	100%	1	\$2,191
Cabernet Sauvignon	1,653			1,047	431	175	\$2,562,944	\$1,550	6%	2,592	61%	4,245	\$6,580,731
Malbec	23			20	3		\$25,910	\$1,125	-1%		0%	23	\$25,910
Merlot	272			167	86	19	\$372,820	\$1,372	23%	653	71%	925	\$1,269,108
Petit Verdot										20	100%	20	\$22,711
Pinot Noir	140			140			\$155,217	\$1,110	7%	224	62%	364	\$404,438
Sangiovese										20	100%	20	\$26,855
Shiraz	1,317			864	285	168	\$2,027,525	\$1,539	9%	1,648	56%	2,965	\$4,564,615
Tempranillo	9					9				2	22%	11	\$30,940
Red total	3,416			2,237	808	371	\$5,171,831	\$1,514	11%	5,161	60%	8,577	\$12,930,776
White													
Chardonnay	710			635		74	\$706,739	\$996	26%	561	44%	1,271	\$1,265,420
Gewurztraminer	3			3							0%	3	\$2,900
Pinot Gris/Grigio	536			456	80		\$680,201	\$1,269	41%	1,317	71%	1,853	\$2,351,584
Prosecco	34			34							0%	34	\$25,830
Riesling	12			12						35	75%	47	\$46,600
Sauvignon Blanc	178			178						352	66%	530	\$425,234
Semillon										46	100%	46	\$43,276
Viognier										11	100%	11	\$15,709
White total	1,473			1,319	80	74	\$1,570,411	\$1,066	39%	2,322	61%	3,795	\$4,176,554
Grand total	4,889			3,556	888	445	\$6,742,242	\$1,379	9%	7,483	60%	12,372	\$17,107,330

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

Wrattobully

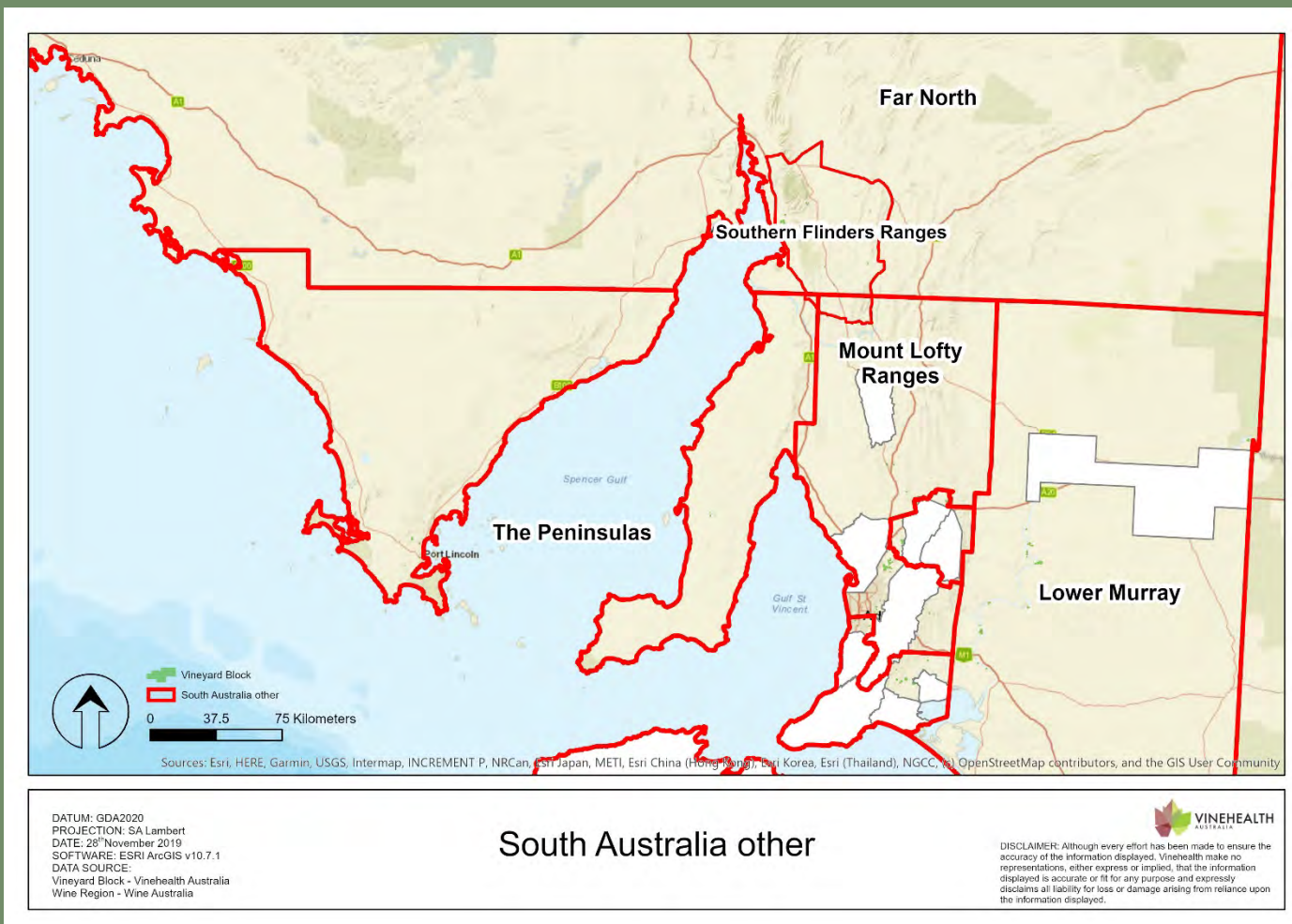
Current plantings by variety and year planted

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	1,214	9	0	71	1,294	5%
Malbec	8	0	0	5	13	38%
Merlot	223	0	0	0	223	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	699	8	11	36	754	5%
Tempranillo	9	0	0	0	9	0%
Other Red	13	0	0	2	15	13%
Total red varieties	2,229	17	11	114	2,371	5%
White winegrapes						
Chardonnay	168	0	0	0	168	0%
Pinot Gris	99	0	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	15	0	2	0	17	0%
Total white varieties	353	0	2	0	355	0%
Unknown variety	6	0	0	0	6	0%
Total all varieties	2,588	17	13	114	2,732	4%

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2020 regional summary report

South Australia – other



Wine Australia July 2020

South Australia 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 1021 hectares.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from South Australia other was 5415 tonnes in 2020, down by 50 per cent compared with the 2019 reported crush of 10,814 tonnes. Over the past five years (up to 2019), the average crush for South Australia other has been 7089 tonnes, making this year's crush 24 per cent below the five-year average.

There were 16 respondents to the survey who reported crushing grapes from South Australia other in 2020, compared with 19 in 2019.

The total estimated value of winegrapes from South Australia other in 2020 was just under \$4 million compared with nearly \$7 million in 2019. The decrease in production was partly offset by an overall increase in the average purchase value of grapes, which increased by 18 per cent from \$615 per tonne in 2019 to \$729 per tonne. It should be noted that the small volume and diversity between the different areas included in this definition make cross-year comparisons unreliable.

According to Vinehealth Australia data, the total vineyard area in South Australia other as at 30 April 2020 is 1021 hectares, compared with 997 hectares in 2019.

There were 28 hectares of new plantings (including top-working and replacements) in the 2019-20 planting season across South Australia other, the majority being Shiraz.

South Australia 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	1,107			1,073	25	8	\$855,701	\$773	-5%	26	2%	1,133	\$875,935
Grenache	24			24						8	26%	32	\$22,673
Mataro/Mourvedre	5				5						0%	5	\$8,550
Merlot	285			285			\$203,922	\$715	11%		0%	285	\$203,922
Montepulciano	4					4					0%	4	\$8,440
Nebbiolo	7			7							0%	7	\$4,784
Petit Verdot	7			7							0%	7	\$5,040
Sangiovese	31			31					-100%		0%	31	\$30,206
Shiraz	1,993		78	1,622	270	24	\$1,882,657	\$945	-3%	280	12%	2,273	\$2,147,175
Red Total	3,463		78	3,049	300	37	\$3,016,114	\$871	-3%	315	8%	3,778	\$3,306,725
White													
Chardonnay	921		921				\$370,648	\$402	6%	13	1%	934	\$376,034
Colombard	220		220							9	4%	230	\$75,015
Muscat Gordo Blanco	38		38							5	11%	43	\$12,849
Pinot Gris/Grigio	100		50	50					-100%		0%	100	\$55,456
Riesling	25		25								0%	25	\$9,360
Sauvignon Blanc	274		201	73			\$145,092	\$529	11%	19	6%	293	\$154,925
Vermentino	9	9									0%	9	\$2,324
Viognier										3	100%	3	\$4,427
Other white										0	100%	0	\$756
White Total	1,588	9	1,455	124			\$666,292	\$420	13%	50	3%	1,637	\$691,146
Grand Total	5,051	9	1,533	3,172	300	37	\$3,682,406	\$729	18%	364	7%	5,415	\$3,997,871

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

South Australia other

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	73	2	2	0	77	0%
Merlot	18	0	0	0	18	0%
Petit Verdot	16	0	0	0	16	0%
Shiraz	134	0	0	12	146	8%
Other Red	12	0	0	0	12	0%
Total red varieties	253	2	2	12	269	4%
White winegrapes						
Chardonnay	76	0	0	0	76	0%
Colombard	13	0	0	0	13	0%
Riesling	10	0	0	0	10	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	9	0	0	0	9	0%
Total white varieties	121	0	0	0	121	0%
Unknown variety	20	0	0	0	20	0%
Total all varieties	394	2	2	12	410	3%

Source:
Vinehealth
Australia

South Australia other

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet 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	189	0	3	4	196	2%
Other Red	22	0	0	2	24	8%
Total red varieties	308	0	3	6	317	2%
White winegrapes						
Chardonnay	4	0	0	0	4	0%
Riesling	5	0	0	0	5	0%
Semillon	1	0	0	0	1	0%
Other White	8	0	0	0	8	0%
Total white varieties	18	0	0	0	18	0%
Unknown variety	18	0	0	0	18	0%
Total all varieties	344	0	3	6	353	2%

Source:
Vinehealth
Australia

South Australia other

Current plantings by variety and year planted – Southern Flinders Ranges and Peninsulas

Southern Flinders Ranges	Variety	Pre-2017	2017	2018	2019	Total area	% planted in 2019
	Red winegrapes						
	Cabernet Sauvignon	12	0	0	0	12	0%
	Merlot	6	0	0	0	6	0%
	Shiraz	120	0	0	7	127	6%
	Other Red	0	0	0	0	0	0%
	Total red varieties	138	0	0	7	145	5%
	White winegrapes						
	Other White	1	0	0	0	1	0%
	Total white varieties	1	0	0	0	1	0%
Unknown variety	42	0	0	0	42	0%	
Total all varieties	181	0	0	7	188	4%	

The Peninsulas	Variety	Pre-2017	2017	2018	2019	% planted	
						Total area	in 2019
	Red winegrapes						
	Cabernet Sauvignon	9	0	0	0	9	0%
	Shiraz	12	0	0	2	14	14%
	Other Red	3	0	0	0	3	0%
	Total red varieties	24	0	0	2	26	8%
	White winegrapes						
	Chardonnay	2	0	0	0	2	0%
	Riesling	3	0	0	0	3	0%
	Sauvignon Blanc	2	0	0	0	2	0%
	Other White	3	0	0	1	4	25%
	Total white varieties	10	0	0	1	11	9%
	Unknown	33	0	0	0	33	0%
	Total all varieties	67	0	0	3	70	4%

Source:
Vinehealth
Australia

Explanations and definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from Wine Australia.

Total crush

The total crushed is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 88 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

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

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – not including specific amounts paid for freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2020).

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

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

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

Important note on average purchase value

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

Price dispersion data (shaded columns in Intake Summary tables)

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

Estimated total value of all grapes

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

Explanations and definitions - continued

PLANTING DATA

Source of planting data tables

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

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

For more information on the planting data in this report or about registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.

Explanatory notes for planting data tables

To protect confidentiality, the following rules are applied to reporting varieties:

- where there are fewer than 10 registered owners with plantings of a particular variety across the state, that variety is not separately identified in either the state or the regional reports but is grouped with “other red/white”, AND
- where there are fewer than three registered owners with a particular grape variety in a given region, that variety is not separately identified in the regional report but is grouped with “other red/white” unless it is a white variety listed in the top seven, or red variety in the top five by planted area for the state for the current year.

- Planting data tables are current as at 30 April 2020 and include all plantings from the 2019–20 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.
- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.

Acknowledgements

AUSTRALIAN NATIONAL VINTAGE SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association, Wine Grape Growers South Australia and Primary Industries and Regions SA.

The survey publication is available on Wine Australia's website wineaustralia.com, the Vinehealth Australia website vinehealth.com.au and via links from the Wine Grape Council SA website wgcsa.com.au and the South Australian Wine Industry Association website www.winesa.asn.au.

Credits

Images – Wine Australia
GI maps – Vinehealth Australia

About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), growing domestic and international markets, protecting the reputation of Australian wine and administering the Export and Regional Wine Support Package (ERWSP).

Wine Australia is an Australian Commonwealth Government statutory authority, established under the *Wine Australia Act 2013*, and funded by grape growers and winemakers through levies and user-pays charges and the Australian Government, which provides matching funding for RDA investments and funds the ERWSP.

Disclaimer

This information has been made available to assist on the understanding that Wine Australia is not rendering professional advice. Wine Australia does not accept responsibility for the results of any actions taken on the basis of the information contained in this report, nor for the accuracy, currency or completeness of any material contained in it. Wine Australia expressly disclaims all and any liability and responsibility to any person in respect of consequences of anything done in respect of reliance, whether wholly or in part, upon this report.

Note: data published in this report supercedes that in earlier reports. Minor variations in reported figures can occur due to data revisions.

Any questions about the report should be directed to:

Wine Australia Market Insights
+61 8 8228 2000
Market.Insights@wineaustralia.com