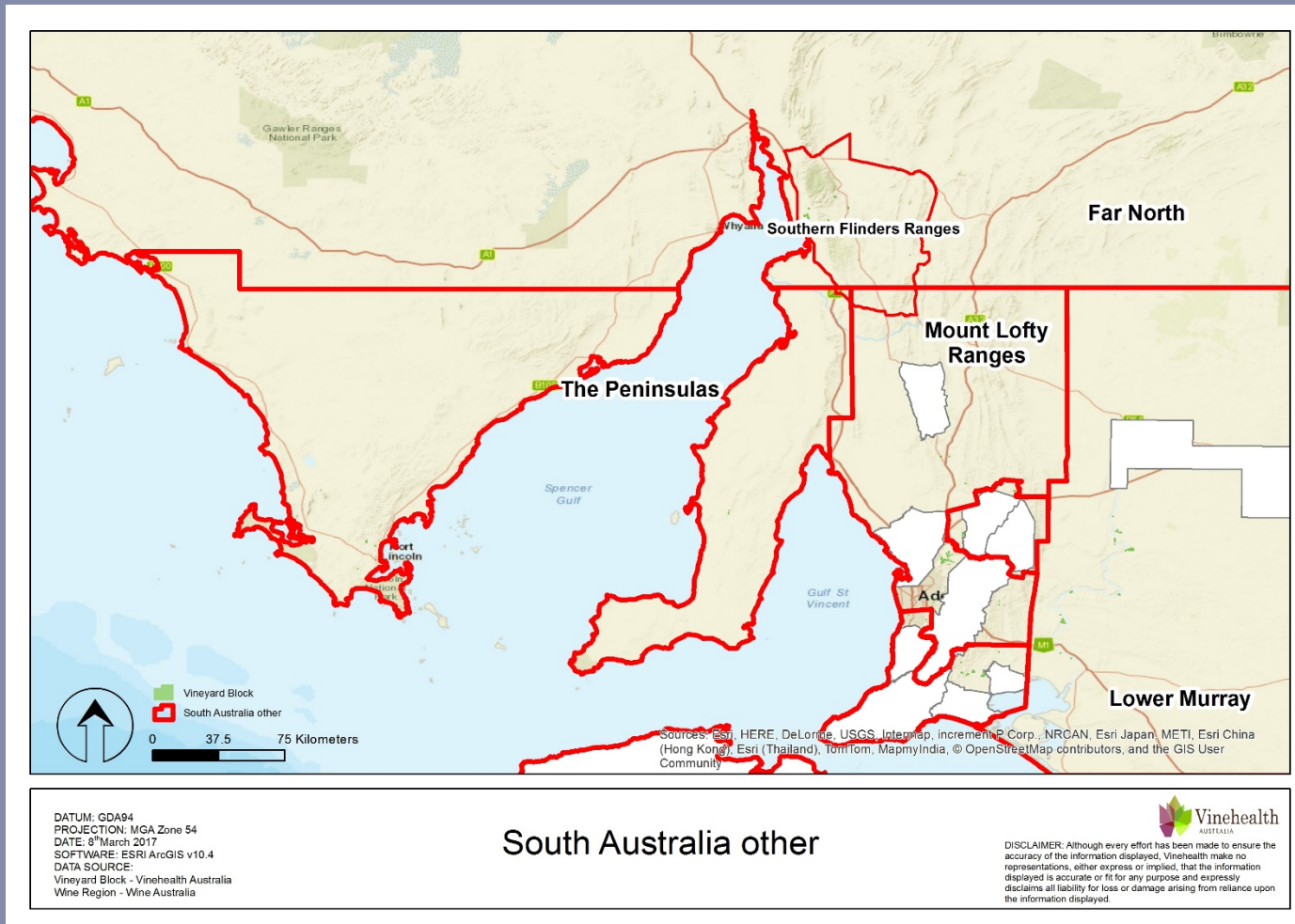


SA Winegrape Crush Survey 2019 Regional Summary Report

South Australia other



Wine Australia July 2019

SA other

Vintage overview

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

OVERVIEW OF VINTAGE STATISTICS

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

The five-year average crush for this group of regions is 5,317 tonnes, implying that 2019 yields were significantly up on average. However, apparent changes in small and non-defined areas may be disproportionately affected by changes in the response group and may appear more significant on a percentage basis than a tonnage basis.

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

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

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

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

SA other

Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Cabernet Sauvignon	1,287		113	1,087	46	41	\$1,048,601	\$815	1%	203	14%	1,490	\$1,214,348
Grenache	4			4							0%	4	\$5,044
Mataro/Mourvedre	15				15						0%	15	\$26,172
Merlot	602		44	558			\$386,971	\$643	48%		0%	602	\$386,971
Montepulciano	4					4					0%	4	\$8,440
Petit Verdot	16			11	6						0%	16	\$17,296
Sangiovese	61			50	11		\$78,195	\$1,283		10	14%	71	\$91,023
Shiraz	2,642		246	2,115	214	67	\$2,574,373	\$974	6%	648	20%	3,290	\$3,205,683
Other red	8			8							0%	8	\$6,045
Red Total	4,639		403	3,833	292	111	\$4,151,136	\$895	3%	861	16%	5,500	\$4,961,022
White													
Chardonnay	3,370		3,370				\$1,281,432	\$380	18%		0%	3,370	\$1,281,432
Colombard	1,183	209	973								0%	1,183	\$348,489
Moscato Giallo										5	100%	5	\$7,500
Muscat Gordo Blanco	143	143									0%	143	\$39,207
Pinot Gris/Grigio	289		215	74			\$157,091	\$544	9%		0%	289	\$157,091
Riesling	59		59								0%	59	\$20,169
Sauvignon Blanc	244		174	70			\$115,571	\$474			0%	244	\$115,571
Vermentino	20		20								0%	20	\$7,091
Viognier	1				1						0%	1	\$1,800
White Total	5,309	352	4,812	144	1		\$1,970,850	\$371	0%	5	0%	5,314	\$1,978,350
Grand Total	9,948	352	5,215	3,977	293	111	\$6,121,986	\$615	-7%	866	8%	10,814	\$6,939,372

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

SA other

Current plantings by variety and year planted

Southern Flinders Ranges

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

The Peninsulas

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

Source: Vinehealth Australia

SA other

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

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	73	0	2	2	76	2%
Merlot	18	0	0	0	18	0%
Petit Verdot	16	0	0	0	16	0%
Shiraz	135	0	0	0	135	0%
Other Red	12	0	0	0	12	0%
TOTAL RED WINEGRAPES	254	0	2	2	257	1%
White winegrapes						
Chardonnay	82	0	0	0	82	0%
Colombard	14	0	0	0	14	0%
Riesling	10	0	0	0	10	0%
Sauvignon Blanc	12	0	0	0	12	0%
Other White	10	0	0	0	10	0%
TOTAL WHITE WINEGRAPES	128	0	0	0	128	0%
Unknown variety	25	0	0	0	25	0%
TOTAL ALL VARIETIES	407	0	2	2	410	0%

Source: Vinehealth Australia

SA other

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

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Sauvignon	73	0	0	0	73	0%
Merlot	6	0	0	0	6	0%
Petit Verdot	6	0	0	0	6	0%
Sangiovese	12	0	0	0	12	0%
Shiraz	186	2	0	0	189	0%
Other Red	22	0	0	0	22	0%
TOTAL RED WINEGRAPES	305	2	0	0	308	0%
White winegrapes						
Chardonnay	4	0	0	0	4	0%
Riesling	5	0	0	0	5	0%
Semillon	1	0	0	0	1	0%
Other White	8	0	0	0	8	0%
TOTAL WHITE WINEGRAPES	18	0	0	0	18	0%
Unknown variety	4	0	0	0	4	0%
TOTAL ALL VARIETIES	327	2	0	0	330	0%

Source: Vinehealth Australia

Explanations and definitions

AUSTRALIAN NATIONAL VINTAGE SURVEY

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

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

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

Photo credits

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Disclaimer

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

Any questions about the report should be directed to:

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Explanations and definitions - continued

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

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

Total crush

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

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 freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2019).

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

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

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

Important note on average purchase value

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

Price dispersion data (shaded columns in Intake Summary tables)

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

Estimated total value of all grapes

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

Explanations and definitions - continued

PLANTING DATA

Source of planting data tables

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

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

Explanatory notes for planting data tables

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

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

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

- Planting data tables are current as at 30 April 2019 and include all plantings from the 2018-19 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.
- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.

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