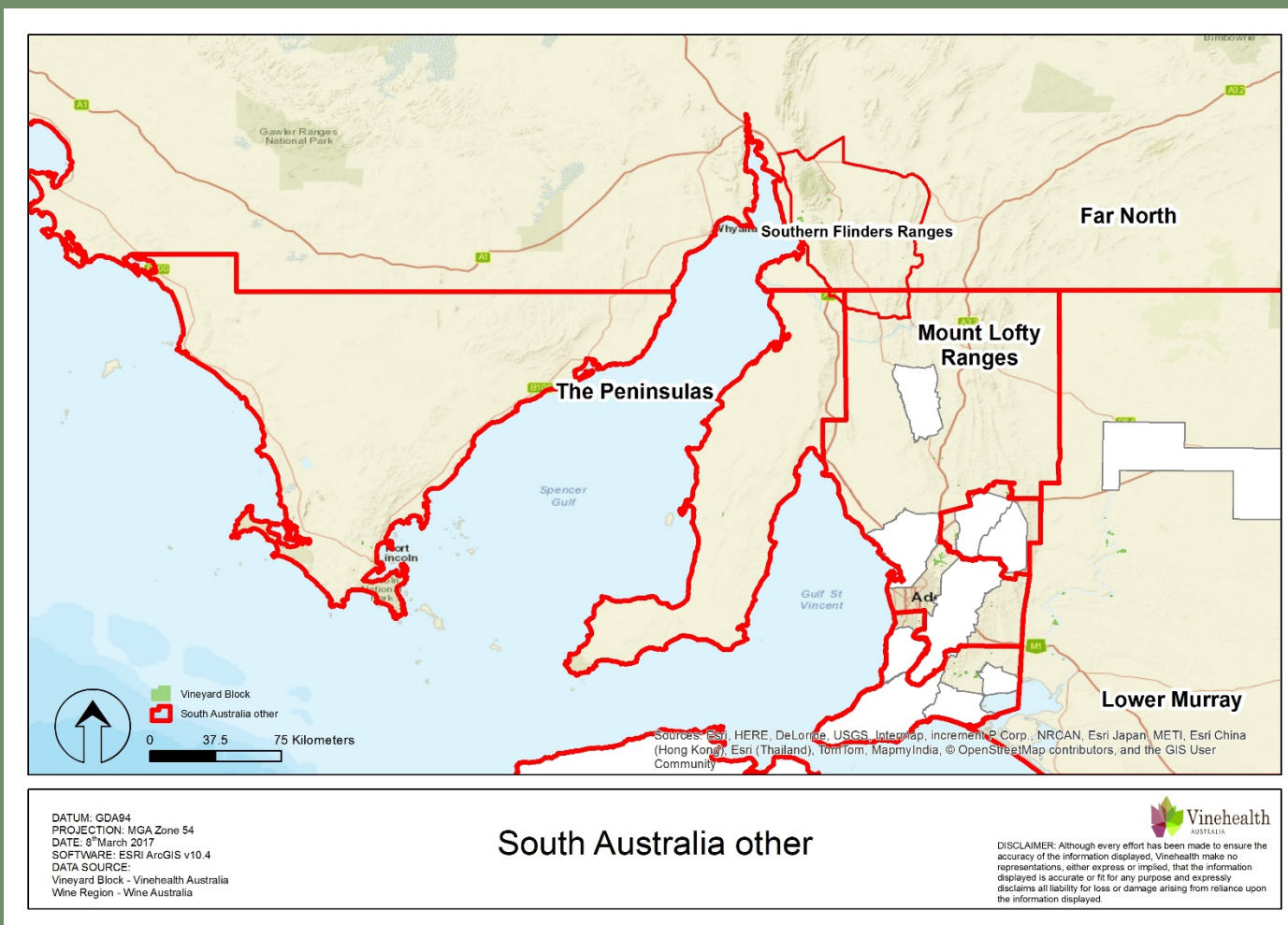


SA Winegrape Crush Survey 2020 regional summary report

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	Total area	% planted 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