2018 SA Winegrape Crush Survey

August 2018

Prepared by:

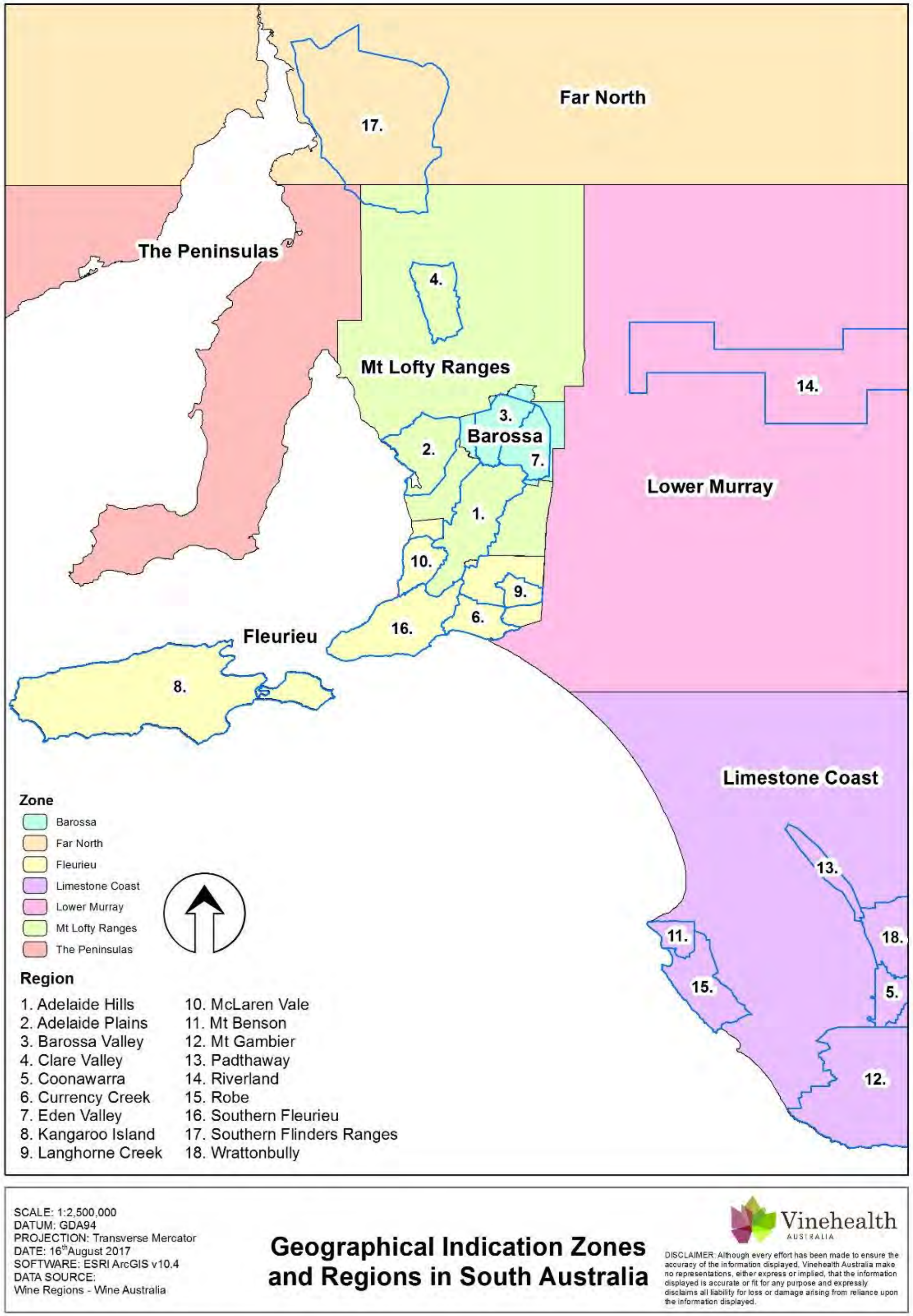
Wine Australia

On behalf of:

SOUTH AUSTRALIAN WINE INDUSTRY
ASSOCIATION INCORPORATED

Wine Grape Council
South Australia

Government of South Australia
Primary Industries and Regions SA



2018 SA Winegrape Crush Survey

State Summary Report

Wine Australia August 2018

State summary 2018

Overview of vintage statistics

State and regional overview

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

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

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

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

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

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

Varietal overview

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

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

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

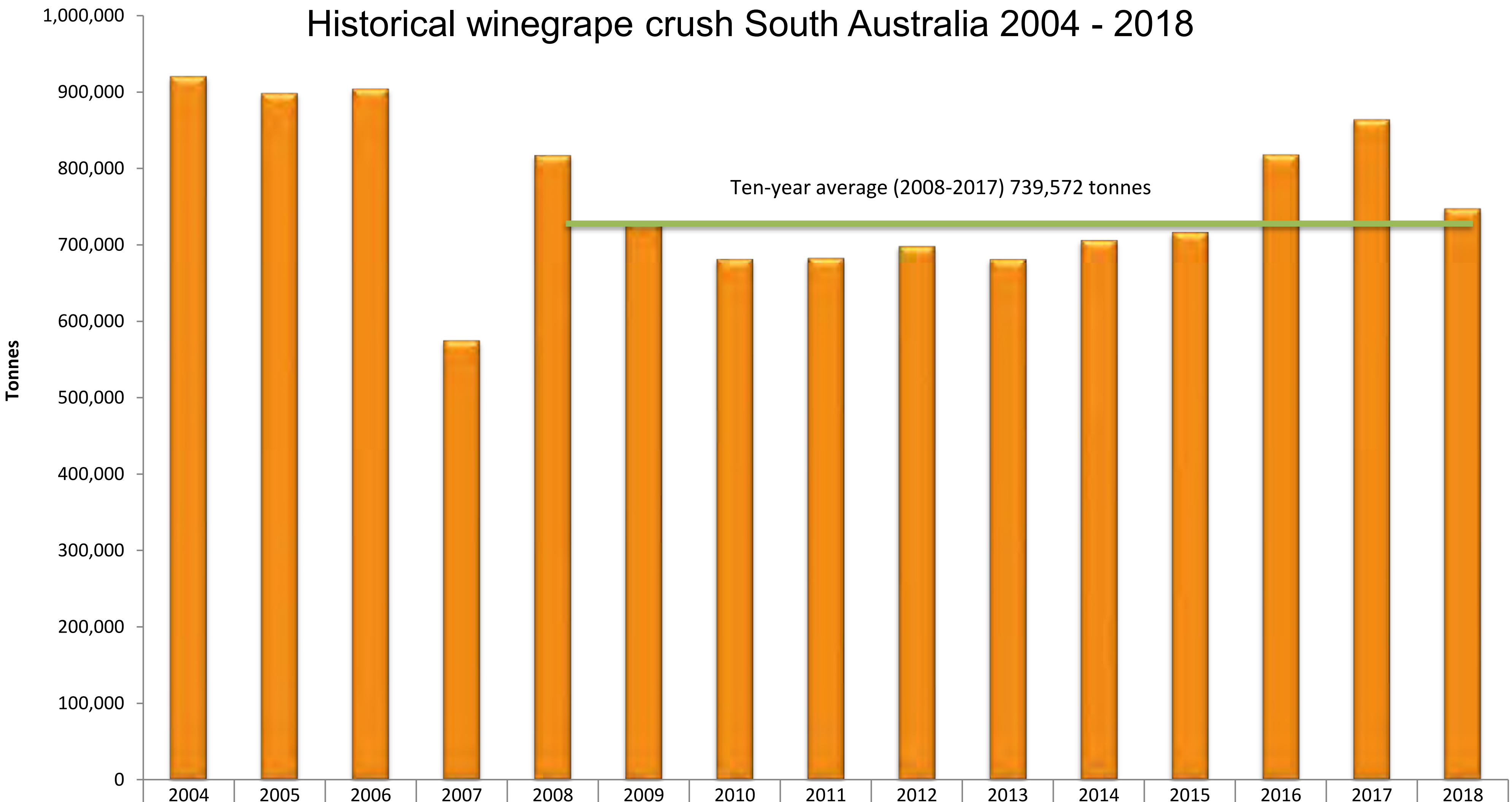
Vineyard plantings

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

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

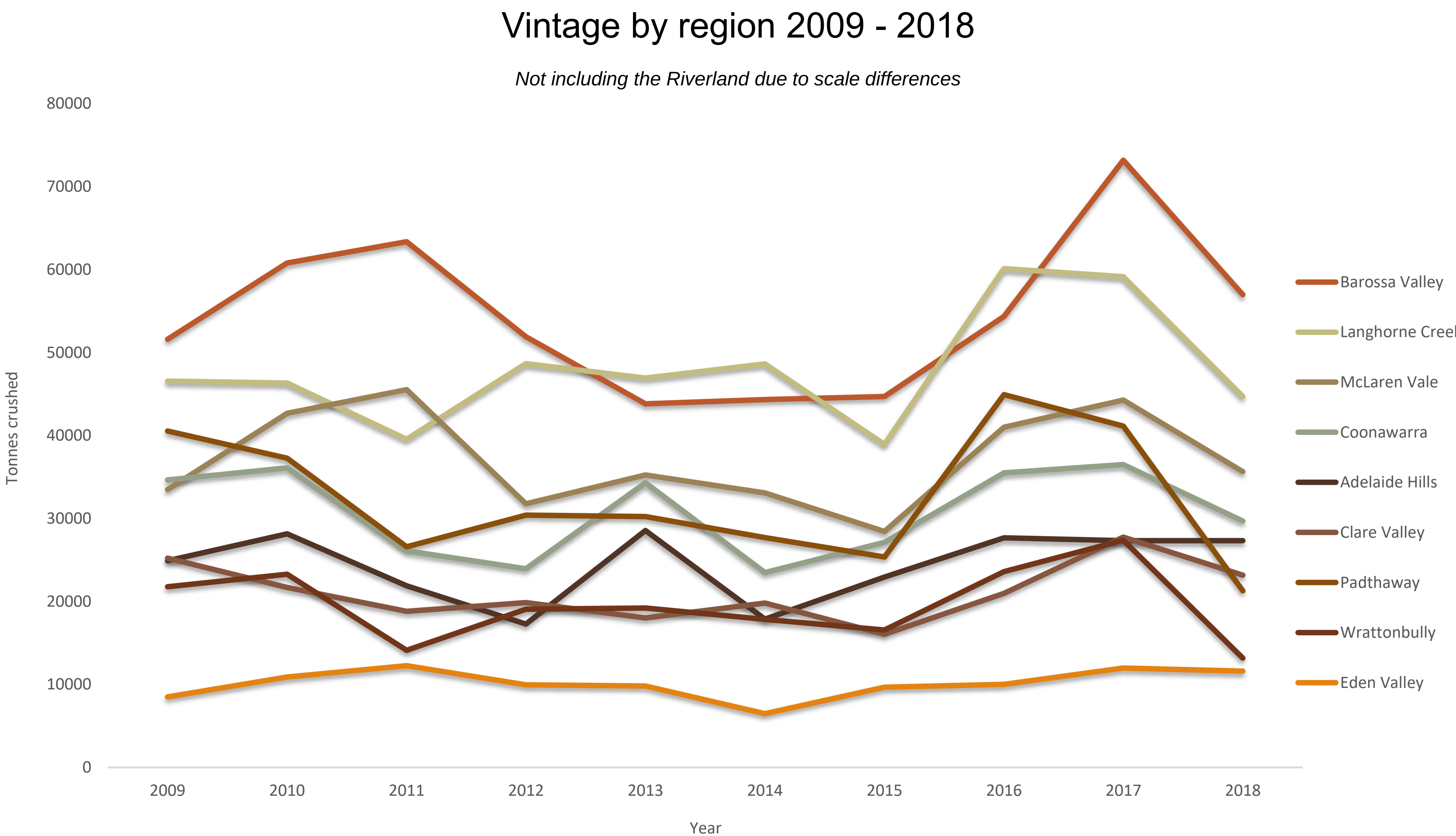
There were 3,326 vineyard owners registered with Vinehealth Australia as at 30 April 2018. This was slightly fewer than at the same time last year.

State summary 2018



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

State summary 2018



State summary 2018

Total crush by GI region 2018 vs 2017

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

State summary 2018

Vintage summary by GI region 2018

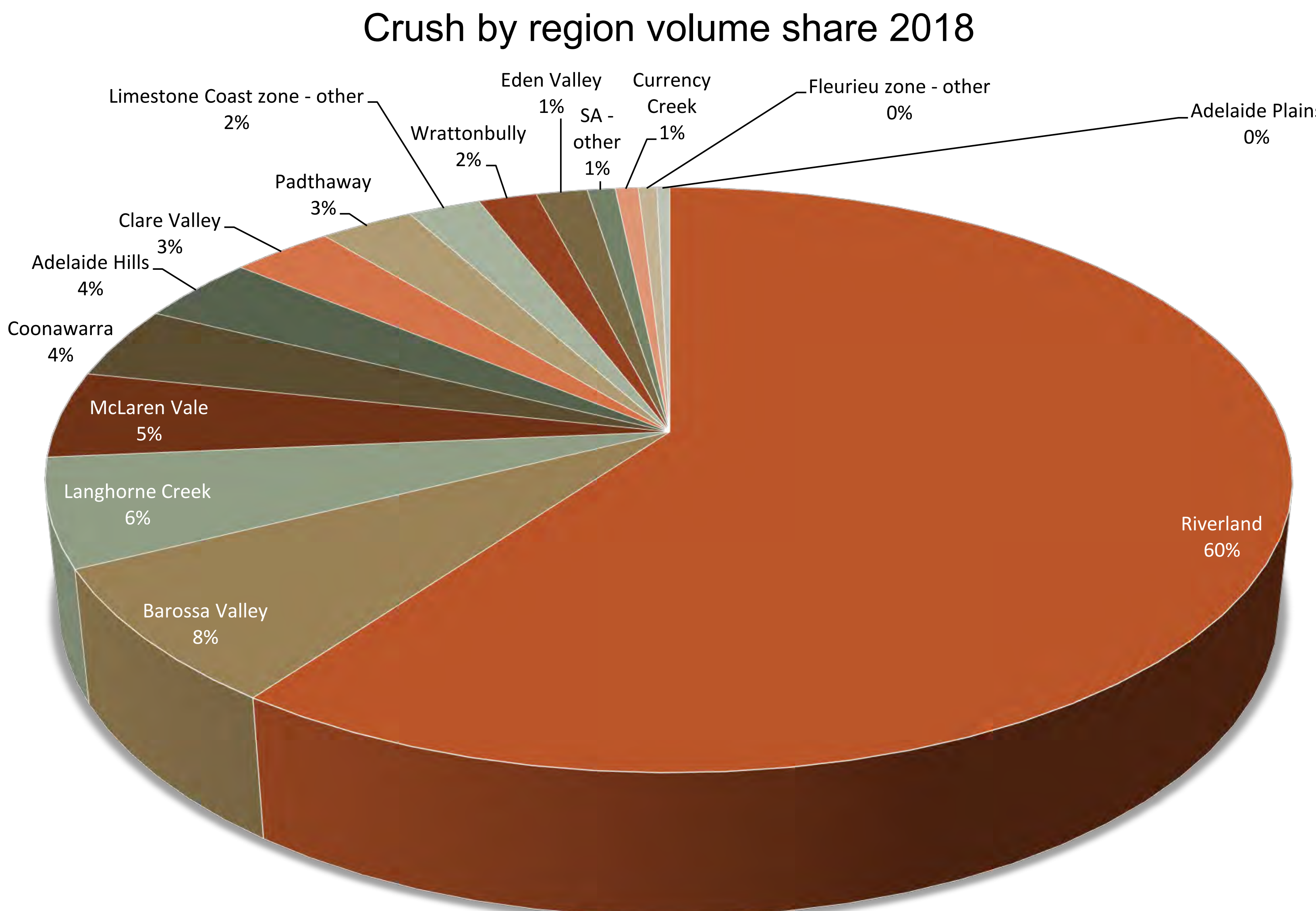
Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2018	Est value of purchased grapes	Est value of all grapes
Adelaide Hills	Red	1,884	6,714	8,597	$10,118,848	$13,194,159
	White	4,508	14,212	18,720	$18,606,300	$24,428,873
	Total	6,392	20,925	27,318	$28,725,148	$37,623,032
Adelaide Plains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

State summary 2018

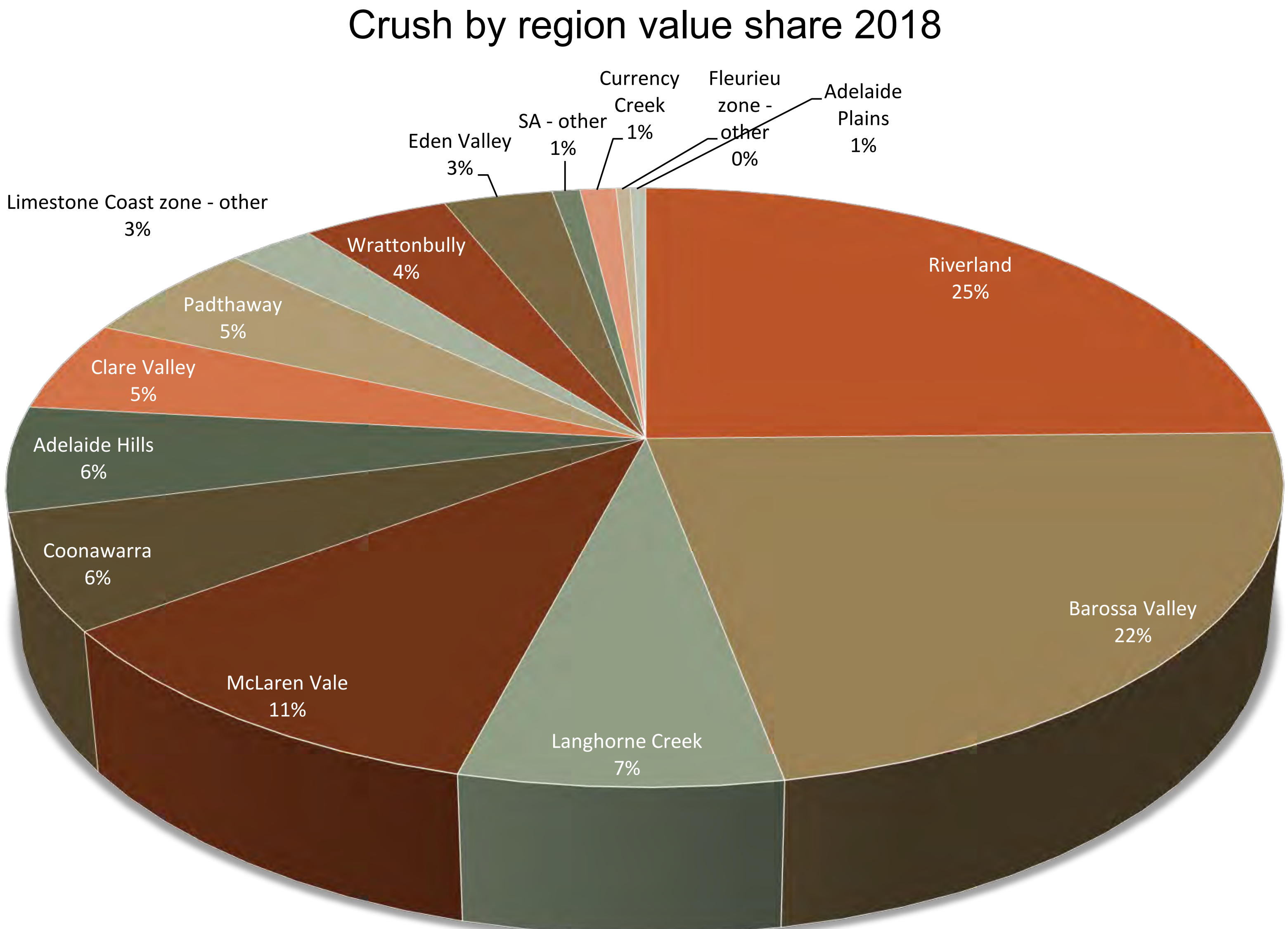
Vintage summary by GI region 2018

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

State summary 2018

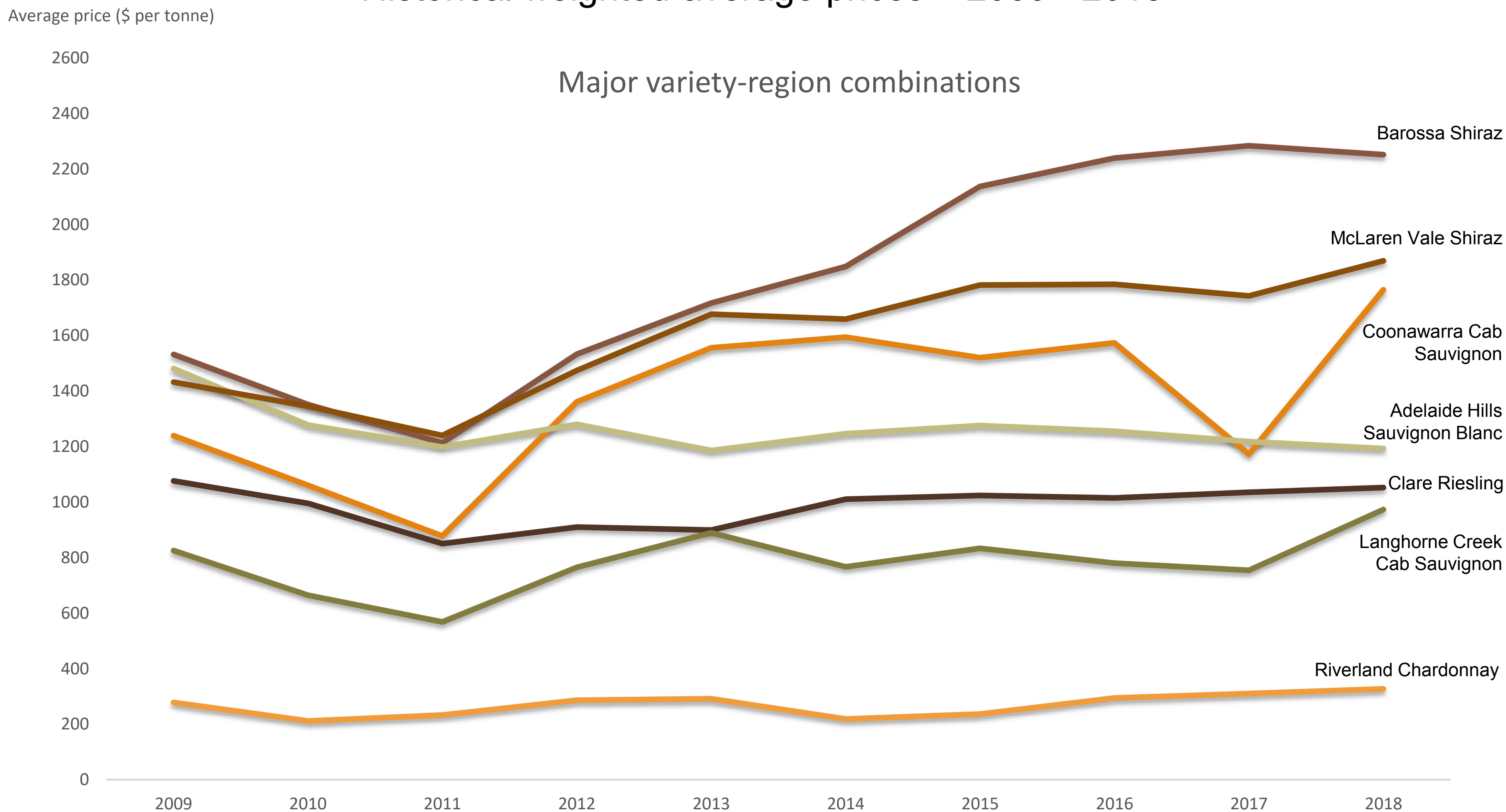


State summary 2018



State summary 2018

Historical weighted average prices – 2009 - 2018

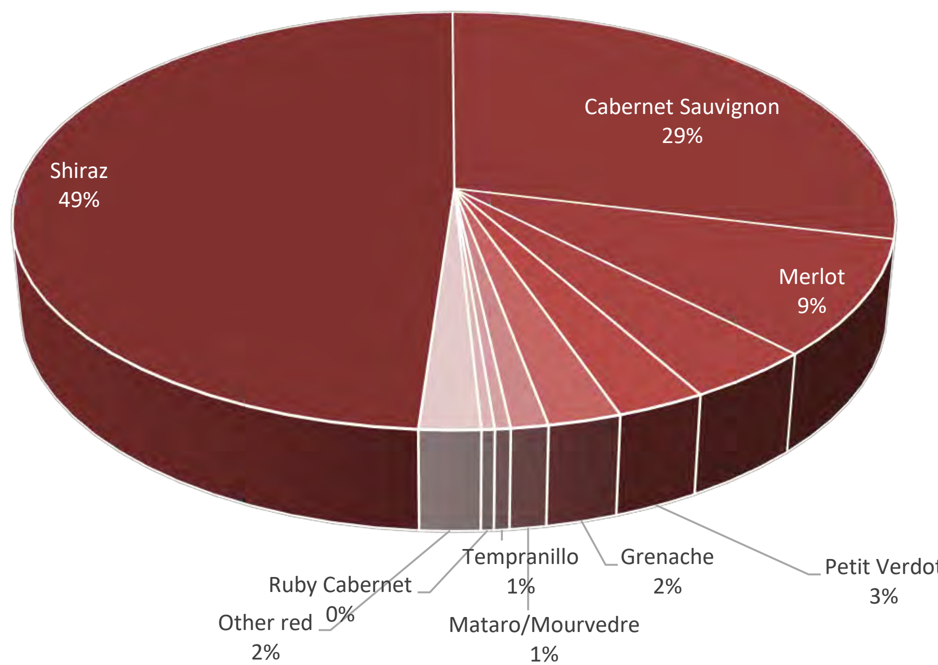


State summary 2018

Vintage summary by variety 2018 – red winegrapes

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

Share of red crush by variety

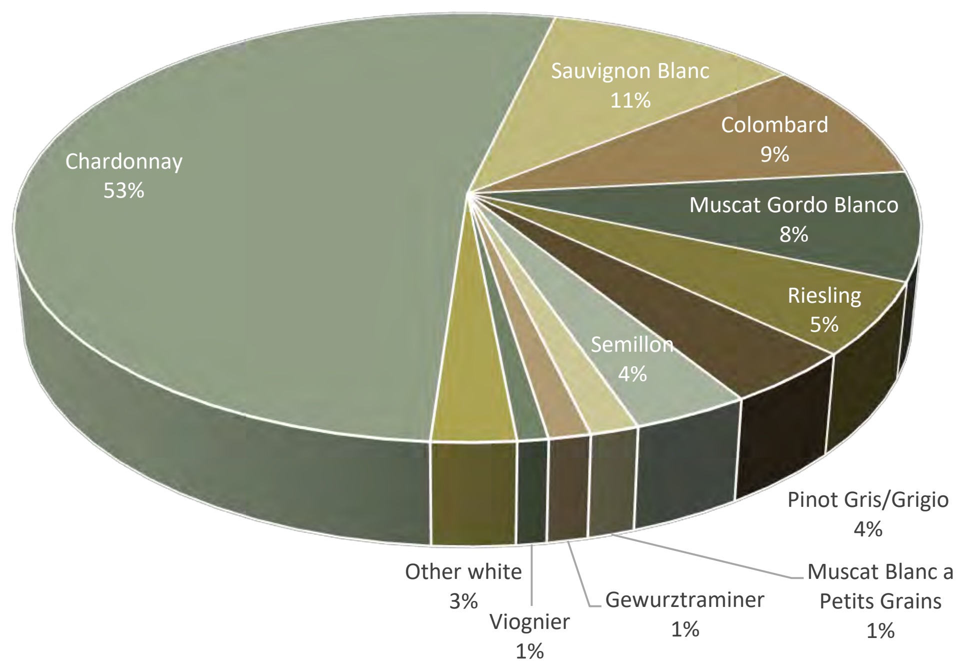


State summary 2018

Vintage summary by variety 2018 – white winegrapes

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

Share of white crush by variety



State summary 2018

Current plantings by variety and year planted – white winegrapes

Current area in hectares

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

Source: Vinehealth Australia

State summary 2018

Current plantings by variety and year planted – red winegrapes

Current area in hectares

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

Source: Vinehealth Australia

State summary 2018

Current plantings by region and year planted

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

Source: Vinehealth Australia

State summary 2018

Number of registered owners by region and property size

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

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

Source: Vinehealth Australia

Explanations and definitions

AUSTRALIAN NATIONAL VINTAGE SURVEY

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

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

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

Photo credits

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Disclaimer

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:
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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 85 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

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

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receival – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2018).

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

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

Average and total purchase values are not reported where there are fewer than three purchasers of a variety in a particular region.

Important note on average purchase value

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

Price dispersion data (shaded columns in Intake Summary tables)

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

Estimated total value of all grapes

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

Explanations and definitions continued

PLANTING DATA

Source of planting data tables

Planting data is not collected by the 2018 Australian Wine Sector Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia.

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

Explanatory notes for planting data tables

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

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

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

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- Planting data tables are current as at 30 April 2018 and include all plantings from the 2017 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.
- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the 2018 report compared with previous reports.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.

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