

Prepared by:

Wine Australia

On behalf of:



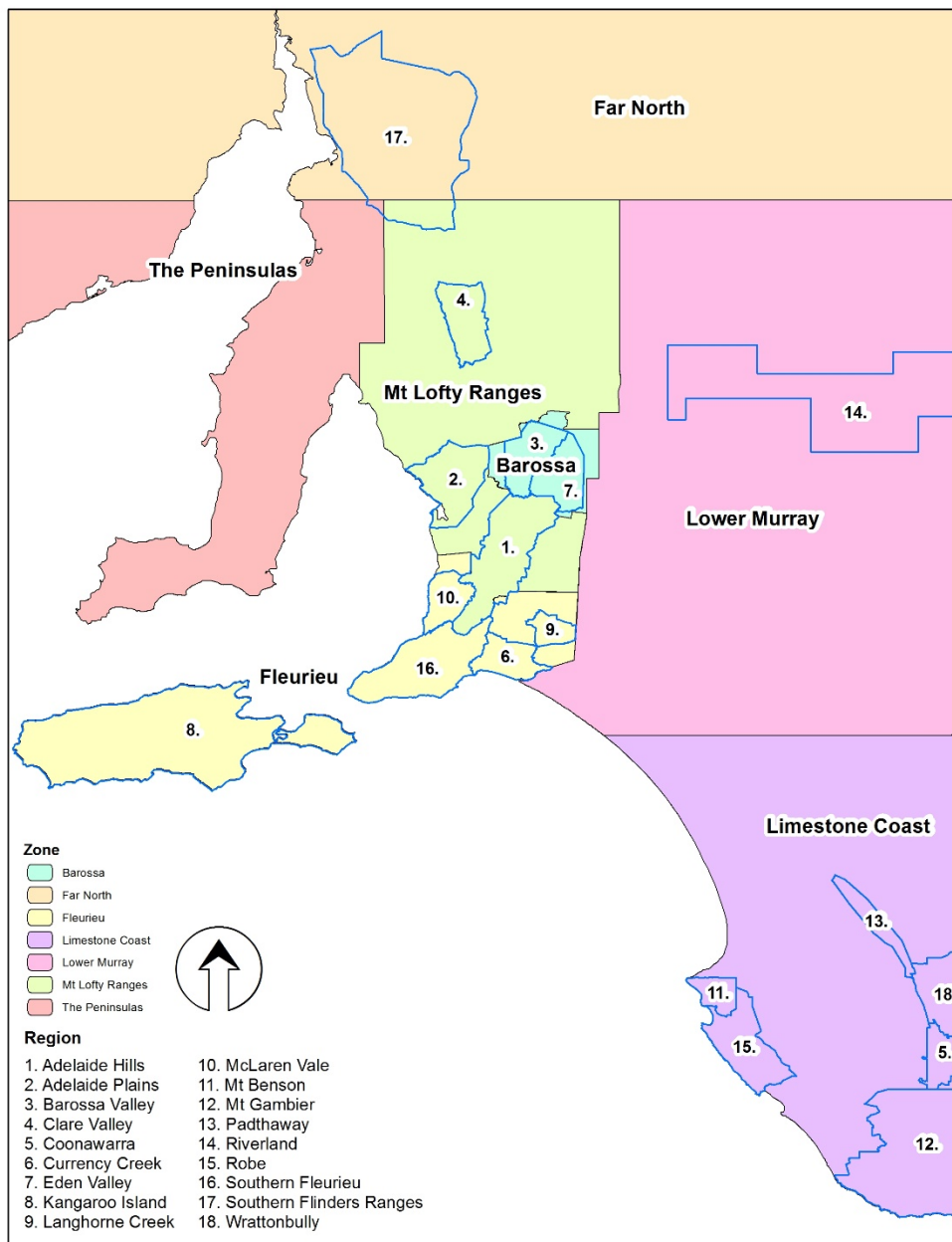
SA Winegrape Crush Survey 2019

July 2019

SA Winegrape Crush Survey 2019

State Summary Report

Wine Australia July 2019



Geographical Indication Zones and Regions in South Australia



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

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

State summary 2019

Overview of vintage statistics

State and regional overview

The total reported crush of South Australian winegrapes in 2019 was 768,863 tonnes. This was an increase of 3 per cent compared with the 2018 reported crush of 748,484 tonnes; it was almost identical to the five-year average (2014-2018) of 770,573 tonnes and 5 per cent above the 10-year average (2009-2018) of 732,734 tonnes¹.

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

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

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

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

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

Varietal overview

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

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

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

Vineyard plantings

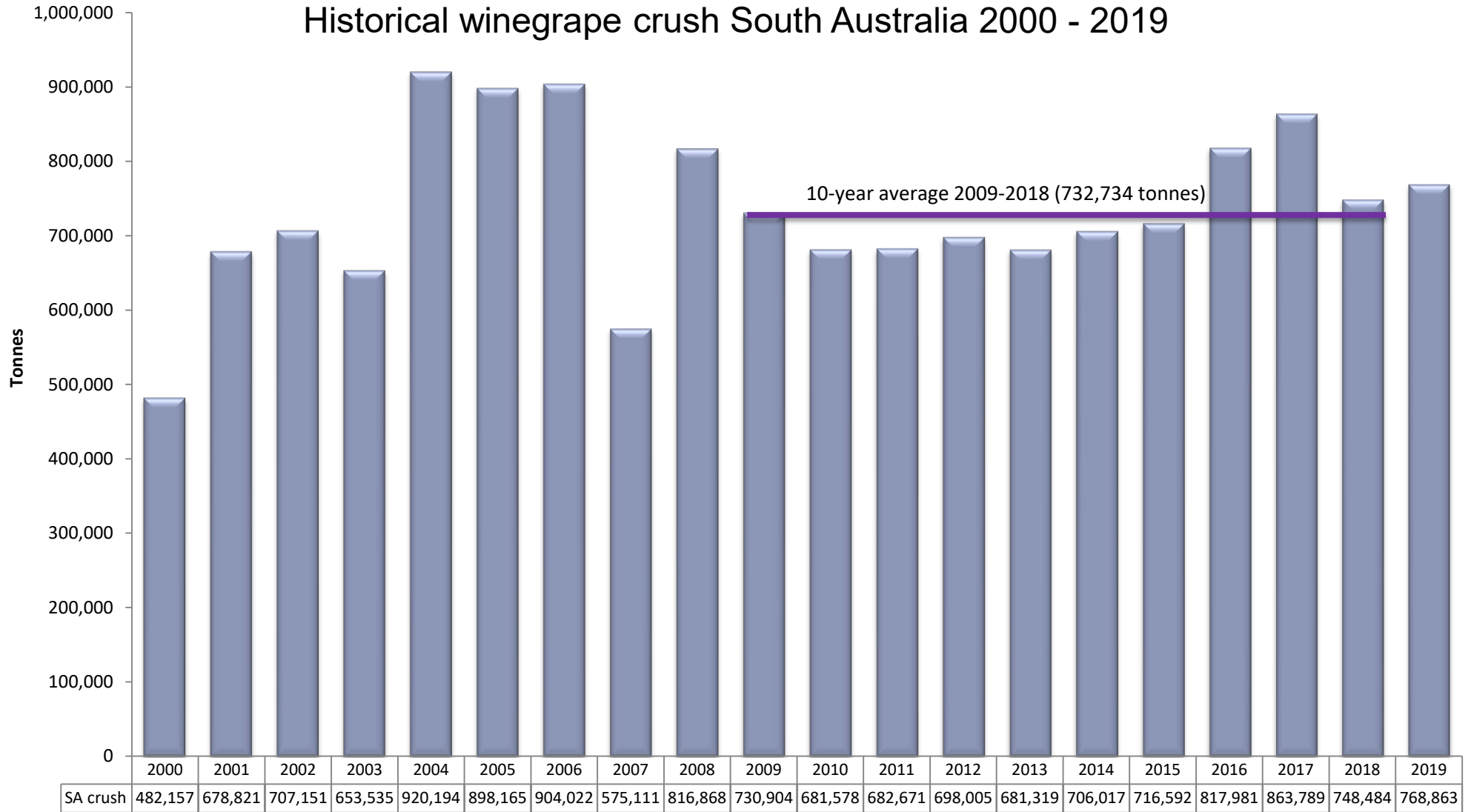
Planting data derived from the Vinehealth Australia vineyard register shows that there were 75,488 hectares planted to vines in South Australia as at 30 April 2019. This represents a net decrease of 68 hectares in the last 12 months. Although there have been net decreases in each of the past five years,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

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

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

State summary 2019

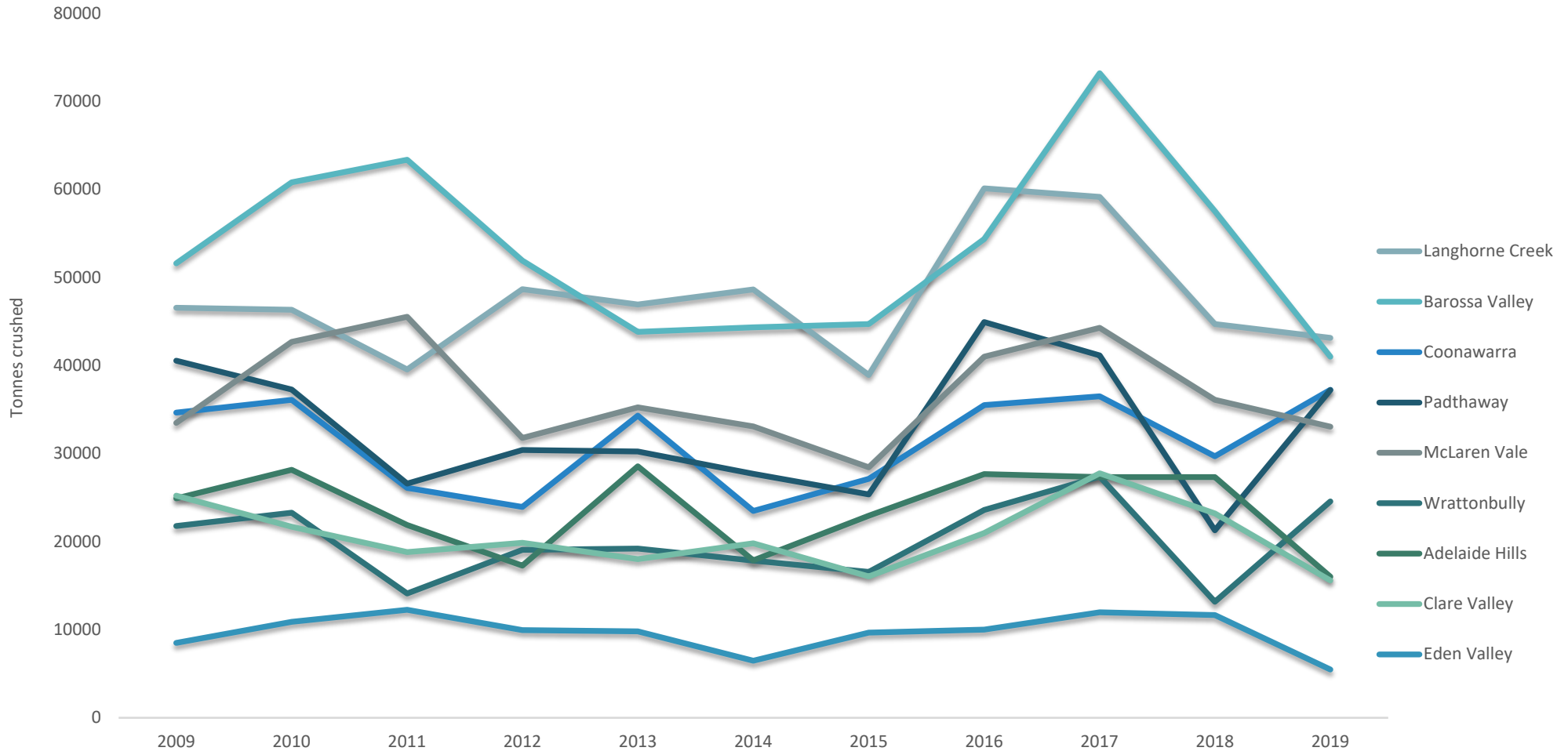
Historical winegrape crush South Australia 2000 - 2019



State summary 2019

Vintage by region 2009 - 2019

Riverland excluded due to scale differences



State summary 2019

Total crush by GI region 2019 vs 2018

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

State summary 2019

Vintage summary by GI region 2019

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

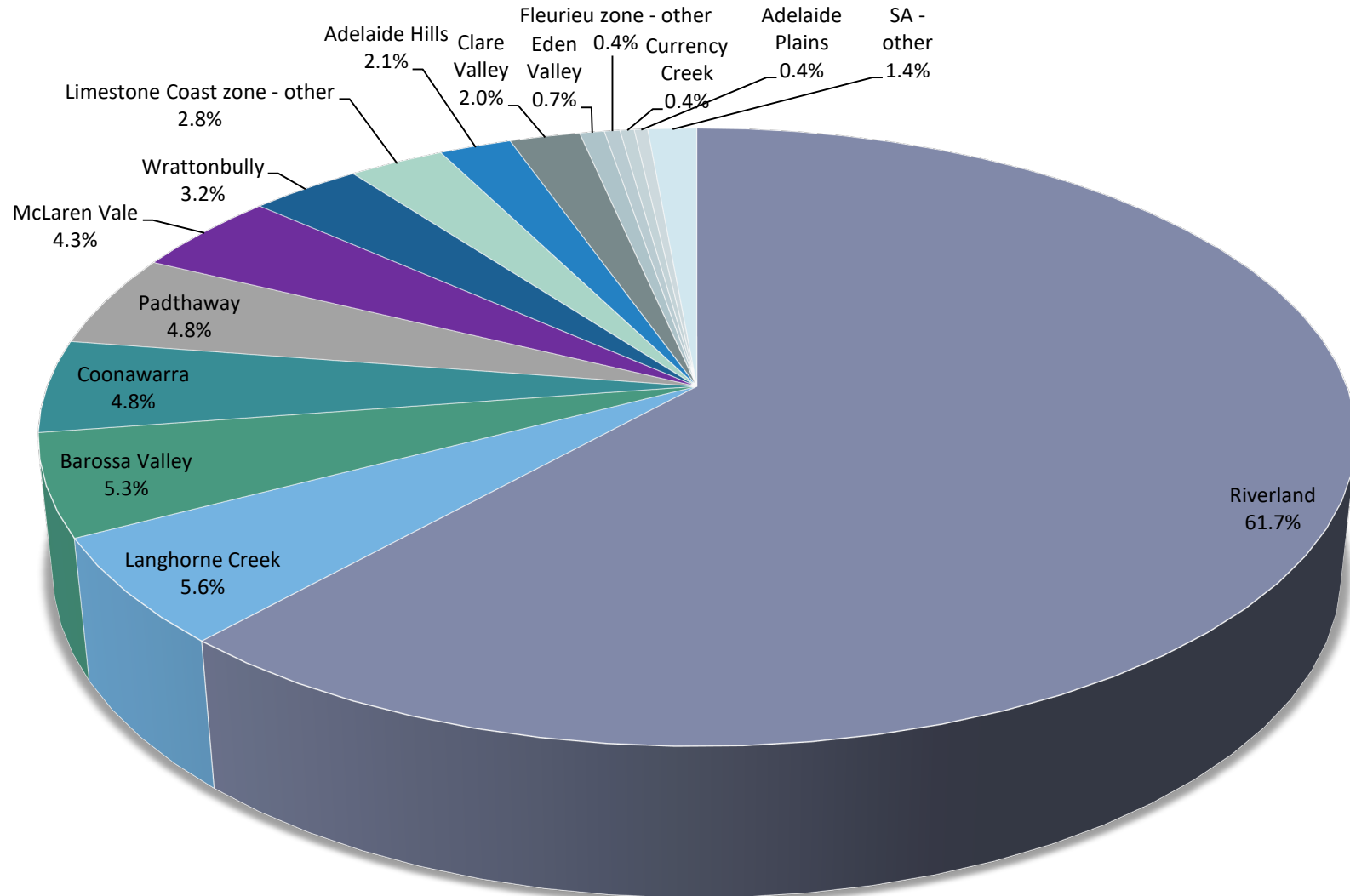
State summary 2019

Vintage summary by GI region 2019

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

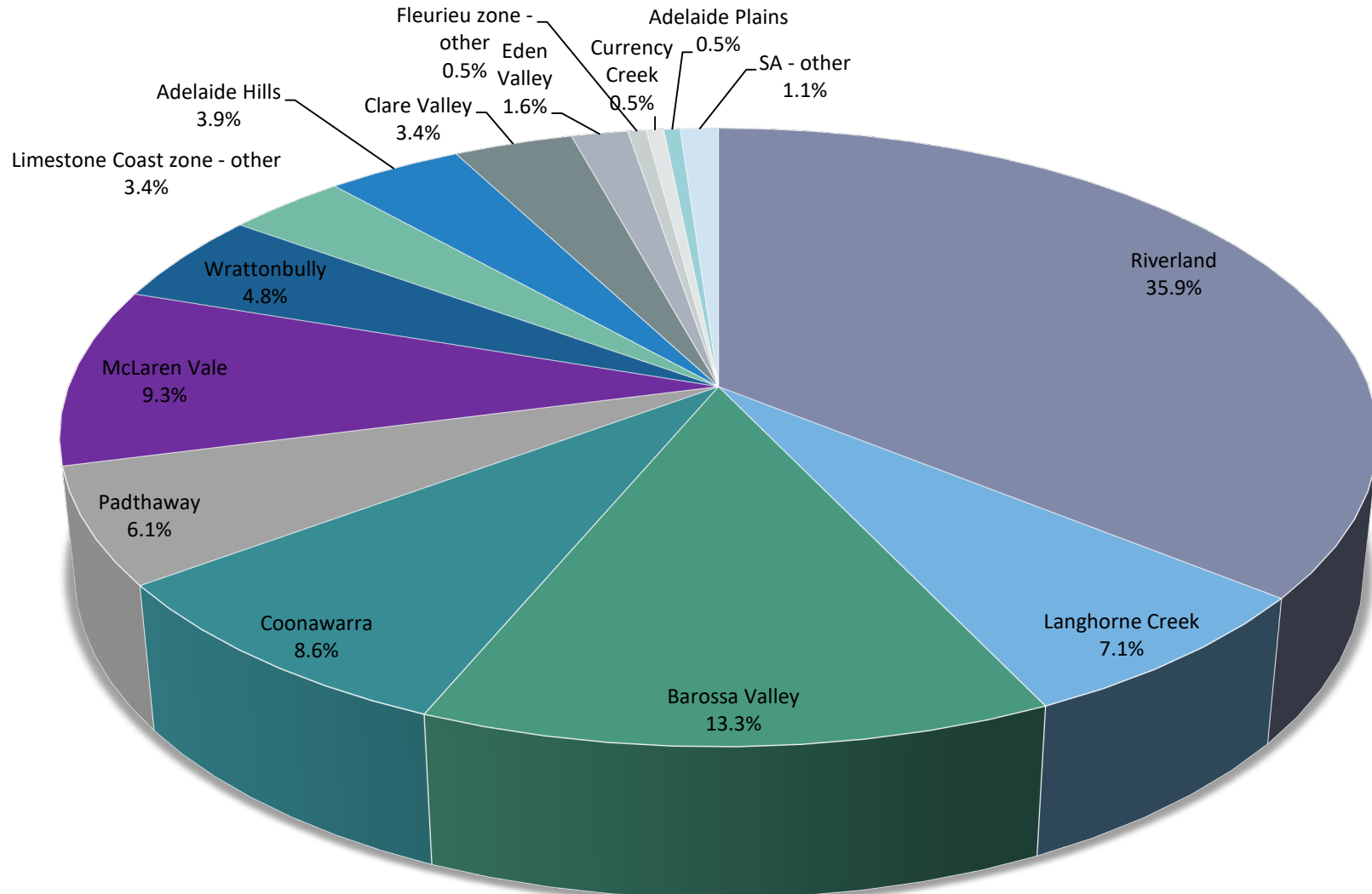
State summary 2019

Crush by region volume share 2019



State summary 2019

Crush by region value share 2019

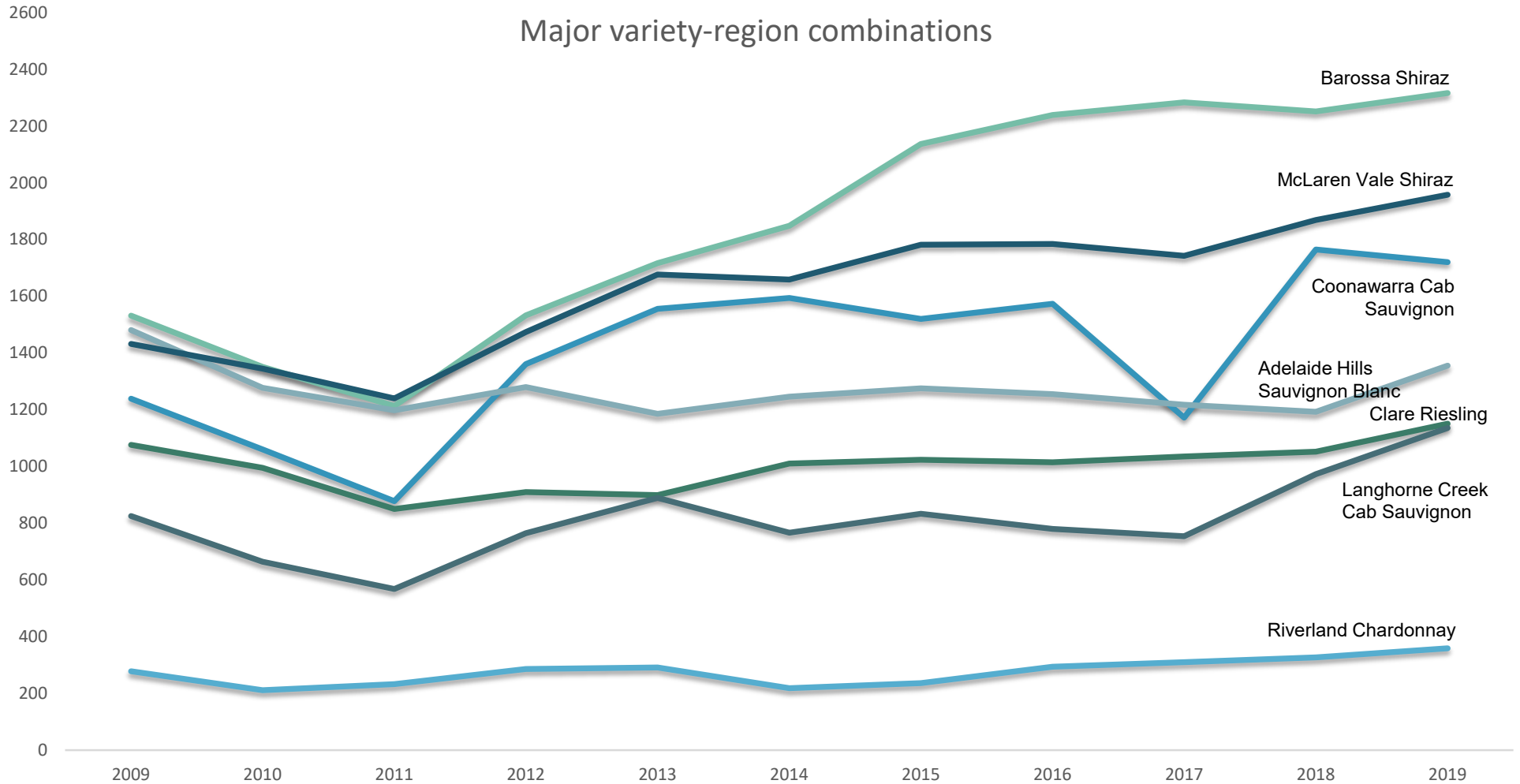


State summary 2019

Historical weighted average prices – 2009 - 2019

Average price (\$ per tonne)

Major variety-region combinations

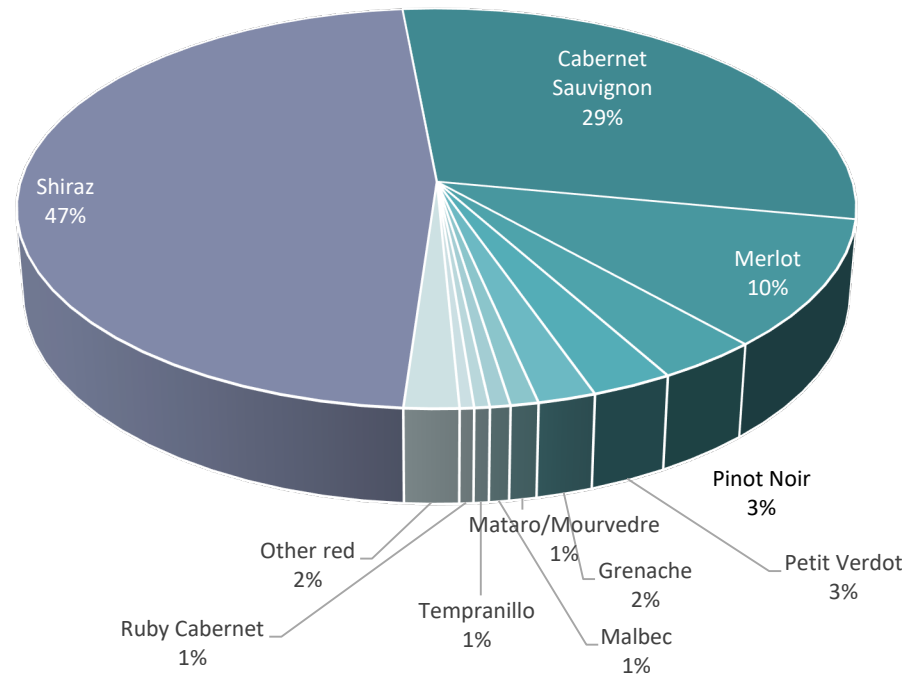


State summary 2019

Vintage summary by variety 2019 – red winegrapes

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

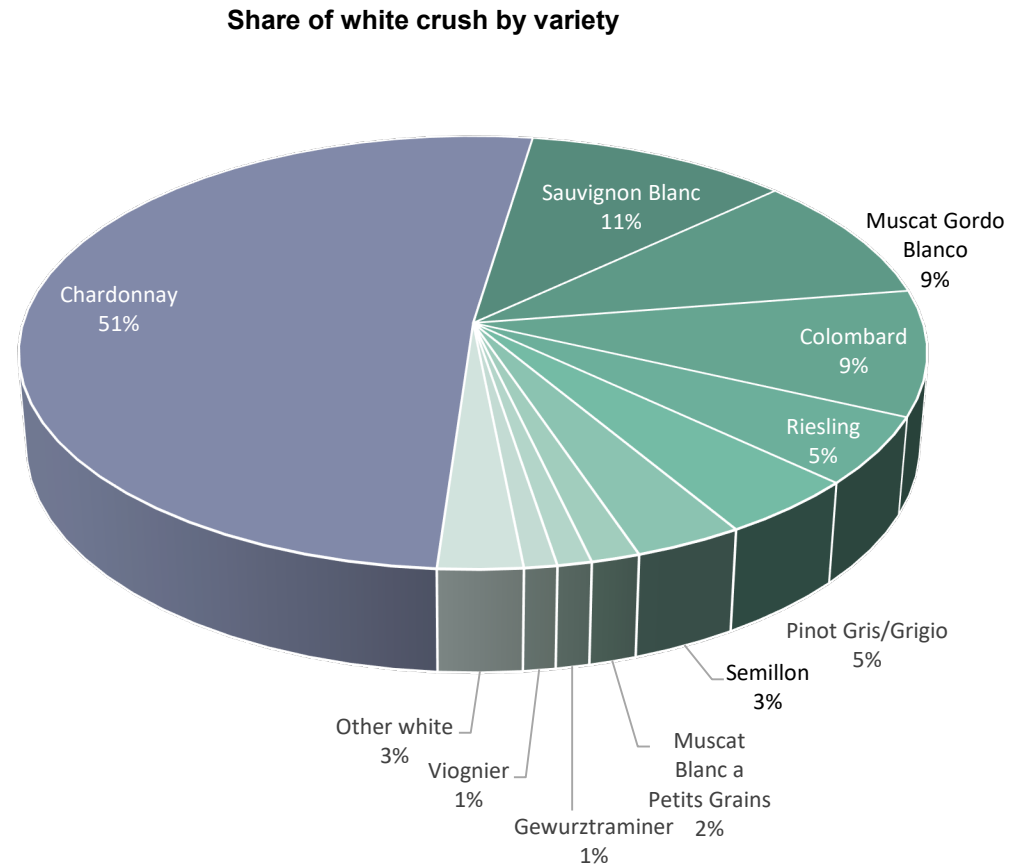
Share of red crush by variety



State summary 2019

Vintage summary by variety 2019 – white winegrapes

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



State summary 2019

Current plantings by variety and year planted – white winegrapes

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

Source:
Vinehealth
Australia

State summary 2019

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

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

Source:
Vinehealth
Australia

State summary 2019

Current plantings by region and year planted

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

Source:
Vinehealth
Australia

State summary 2019

Number of registered owners by region and property size

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

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

Source: Vinehealth Australia

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

Cover image: Wine Australia
Image pg 18: Ewen Bell / Wine Australia

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
+618 8228 2000
Market.insights@wineaustralia.com



Explanations and definitions - continued

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

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

Total crush

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

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

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

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2019).

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

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

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

Important note on average purchase value

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

Price dispersion data (shaded columns in Intake Summary tables)

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

Estimated total value of all grapes

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

Explanations and definitions - continued

PLANTING DATA

Source of planting data tables

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

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

Explanatory notes for planting data tables

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

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

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

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

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