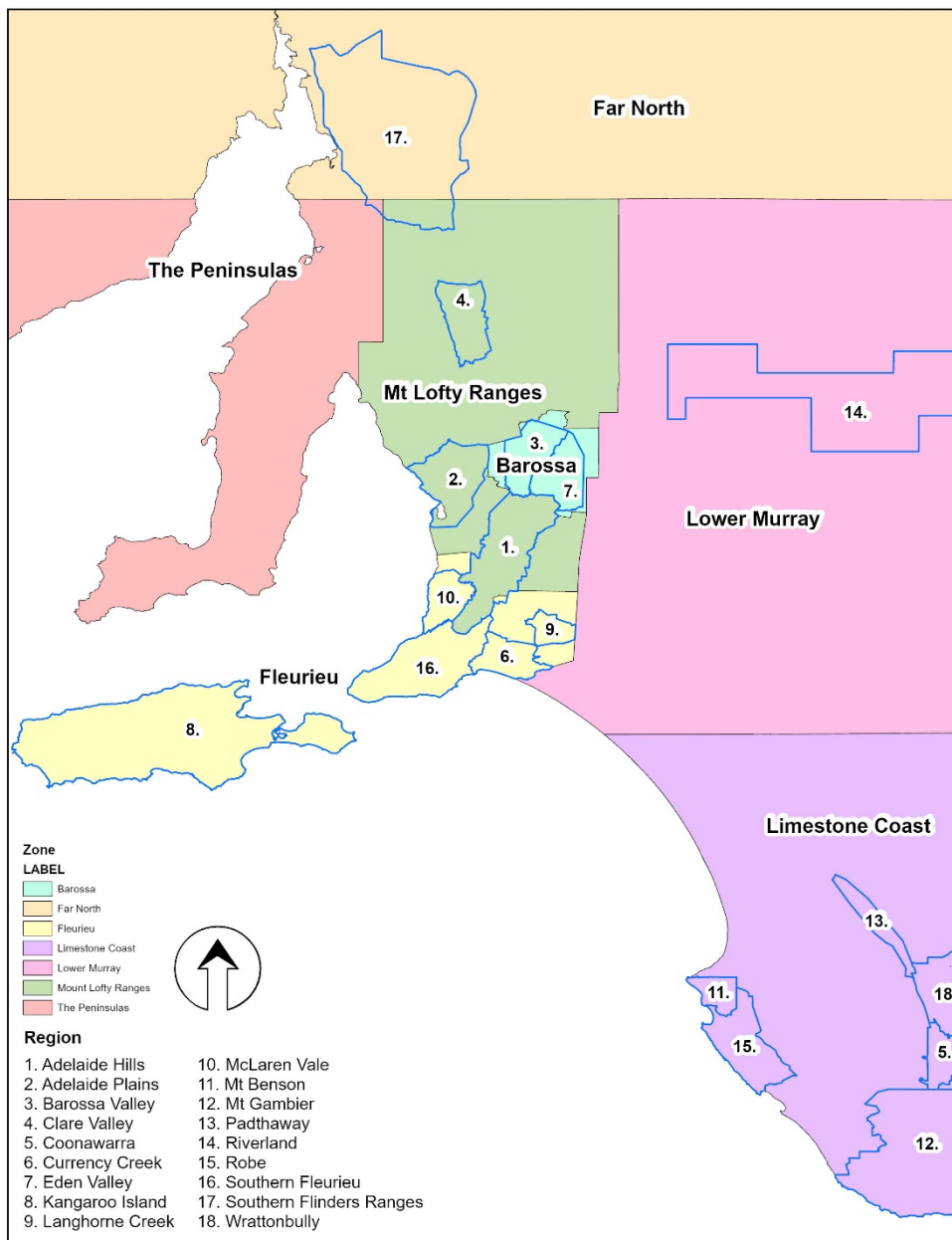


SA Winegrape Crush Survey 2020

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

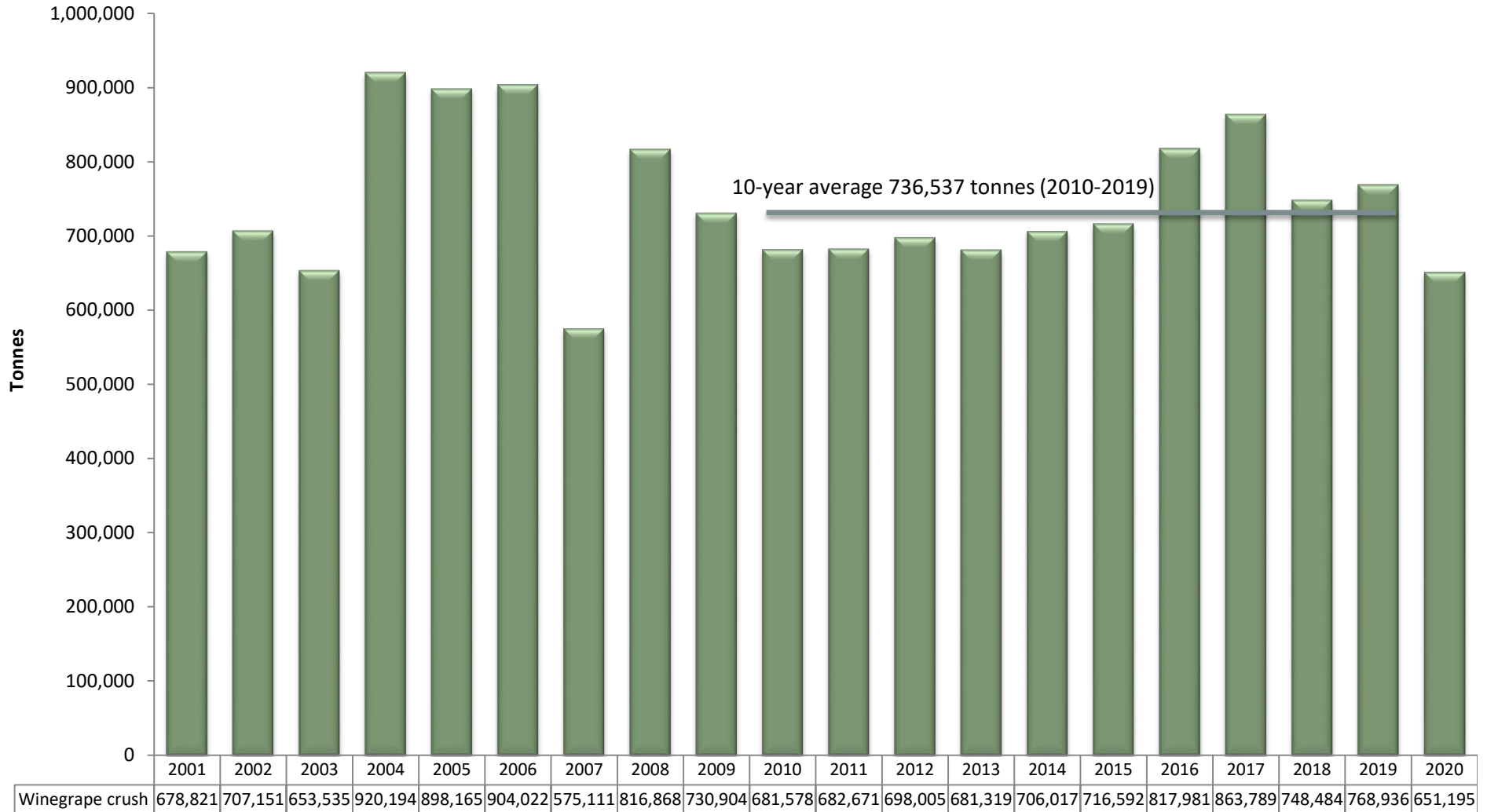
Planting data derived from the Vinehealth Australia vineyard register shows that there were 76,008 hectares planted to vines in South Australia as at 30 April 2020. This represents a net increase of 520 hectares in the last 12 months.

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

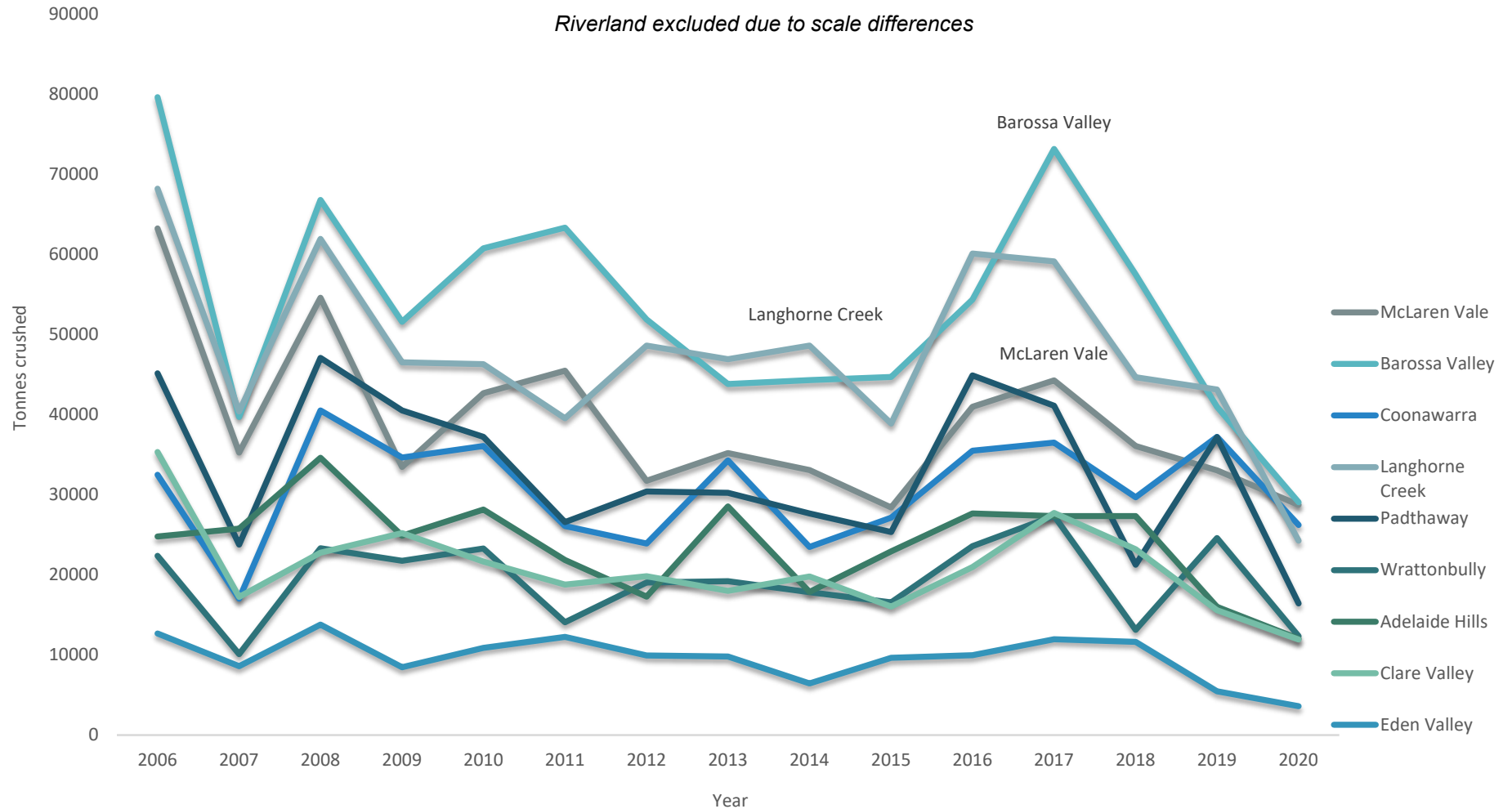
Historical winegrape crush South Australia 2001 - 2020



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

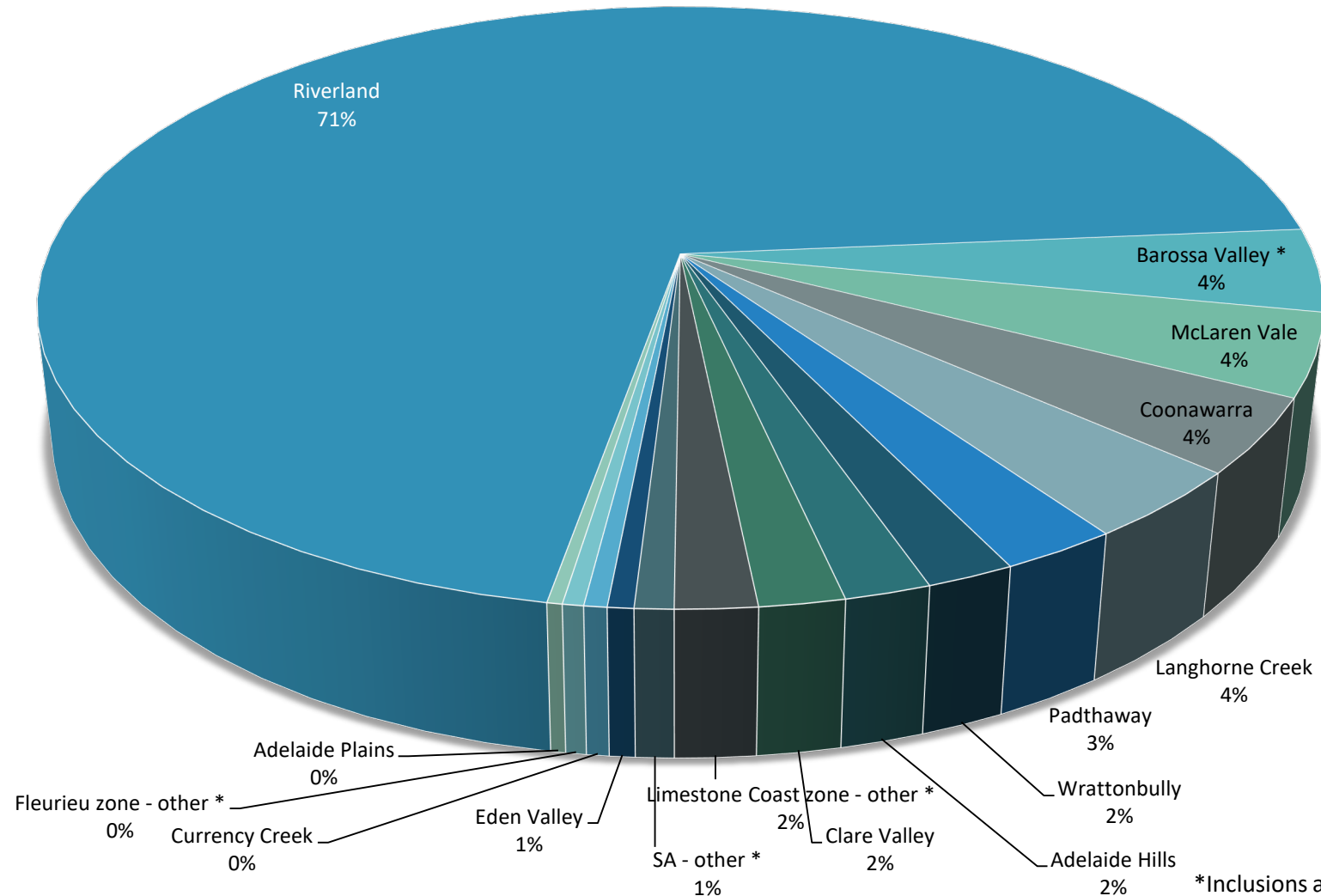
State summary 2020

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

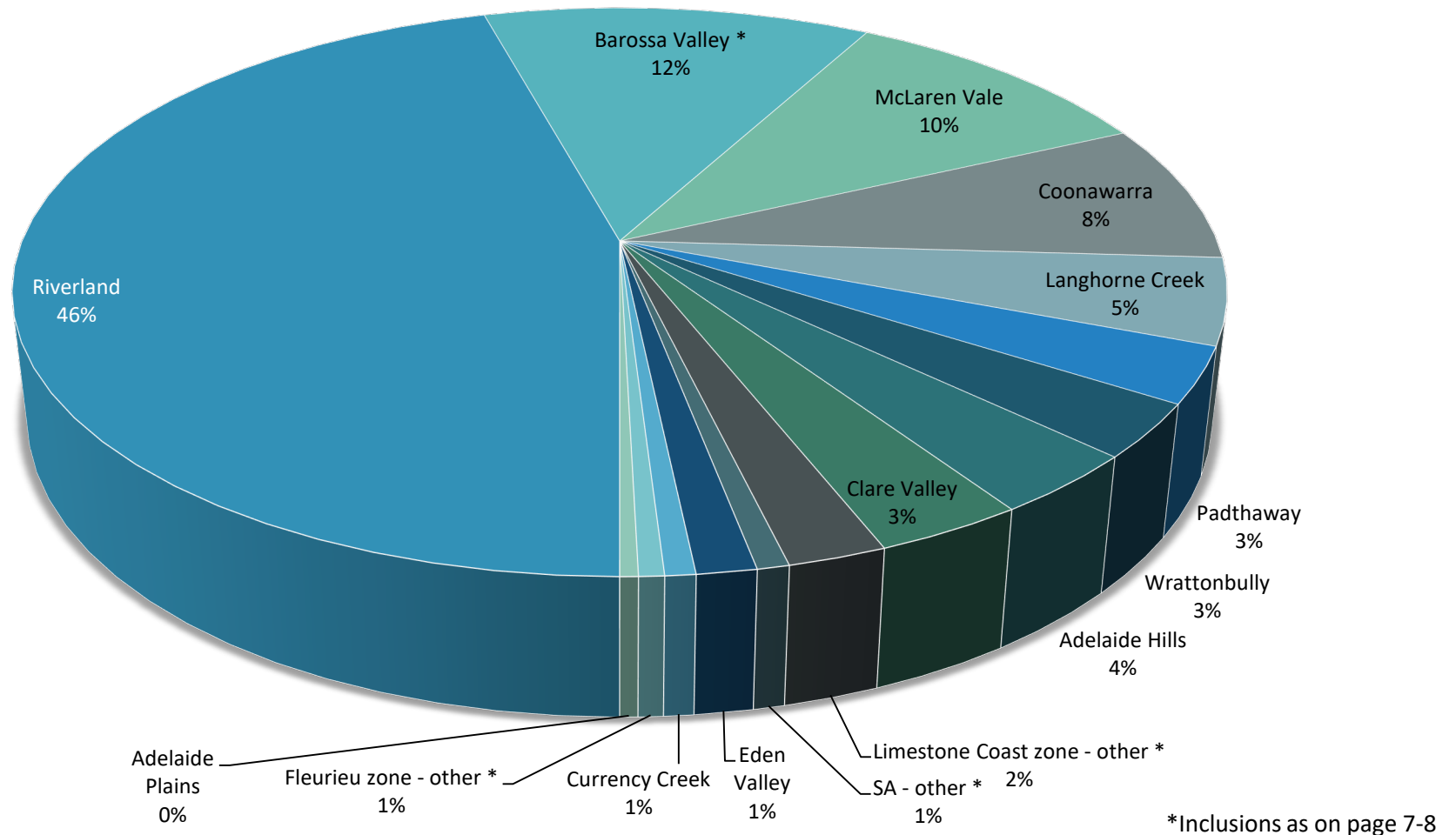
Share of crush volume by region 2020



*Inclusions as on page 7-8

State summary 2020

Share of crush value by region 2020

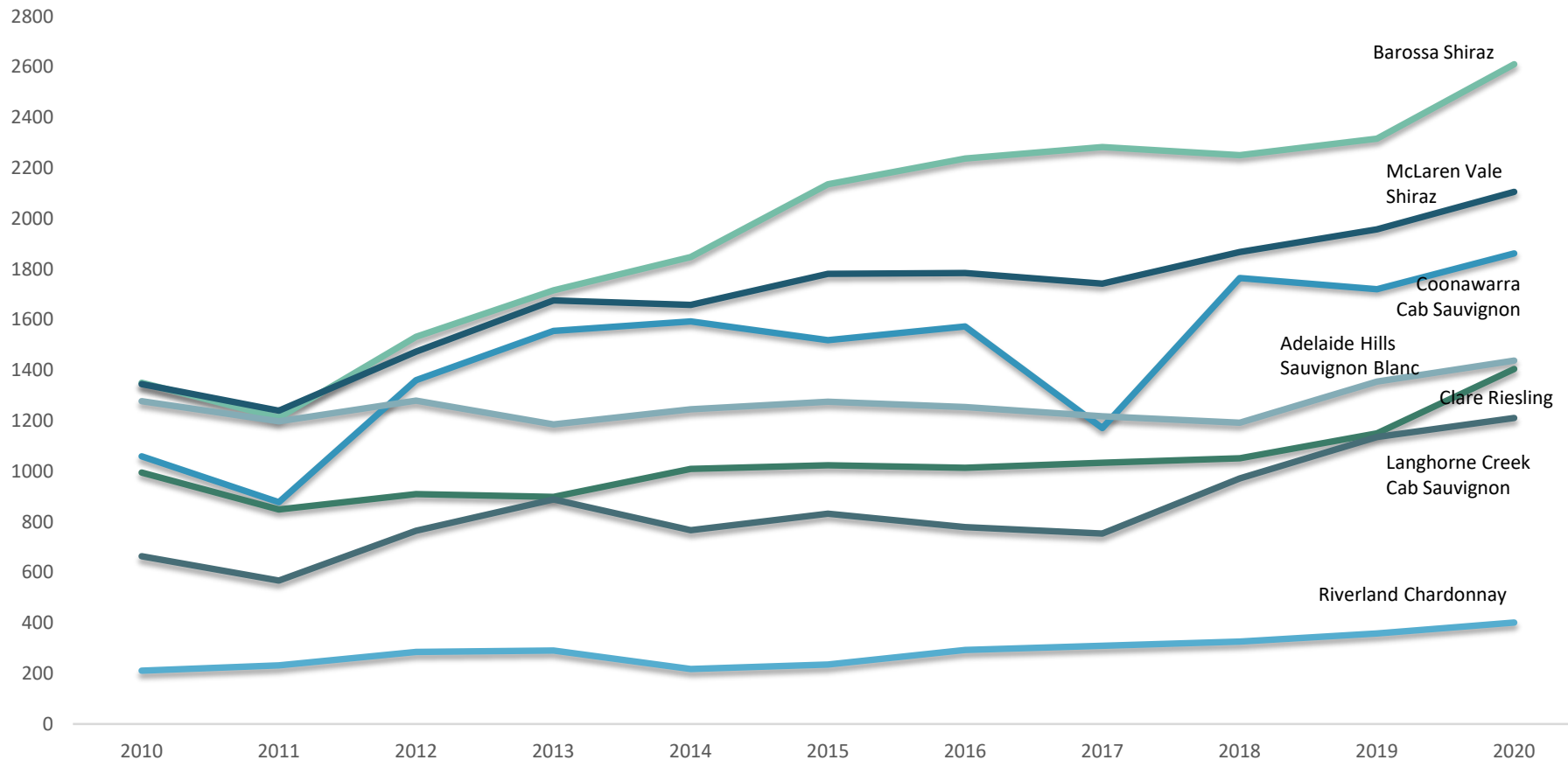


State summary 2020

Historical weighted average prices – 2010 - 2020

Major variety-region combinations

Average price (\$ per tonne)

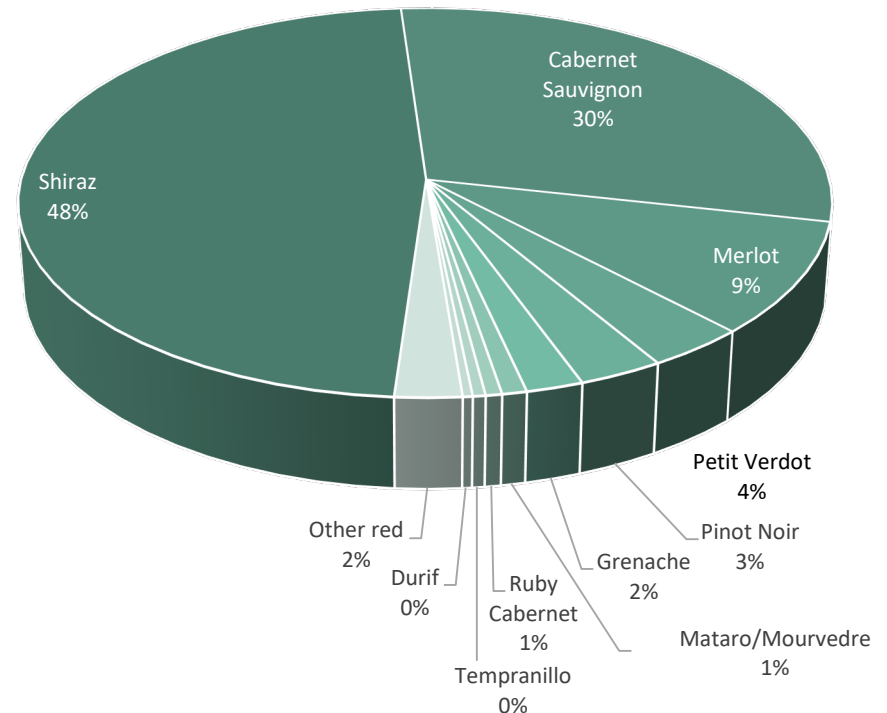


State summary 2020

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%

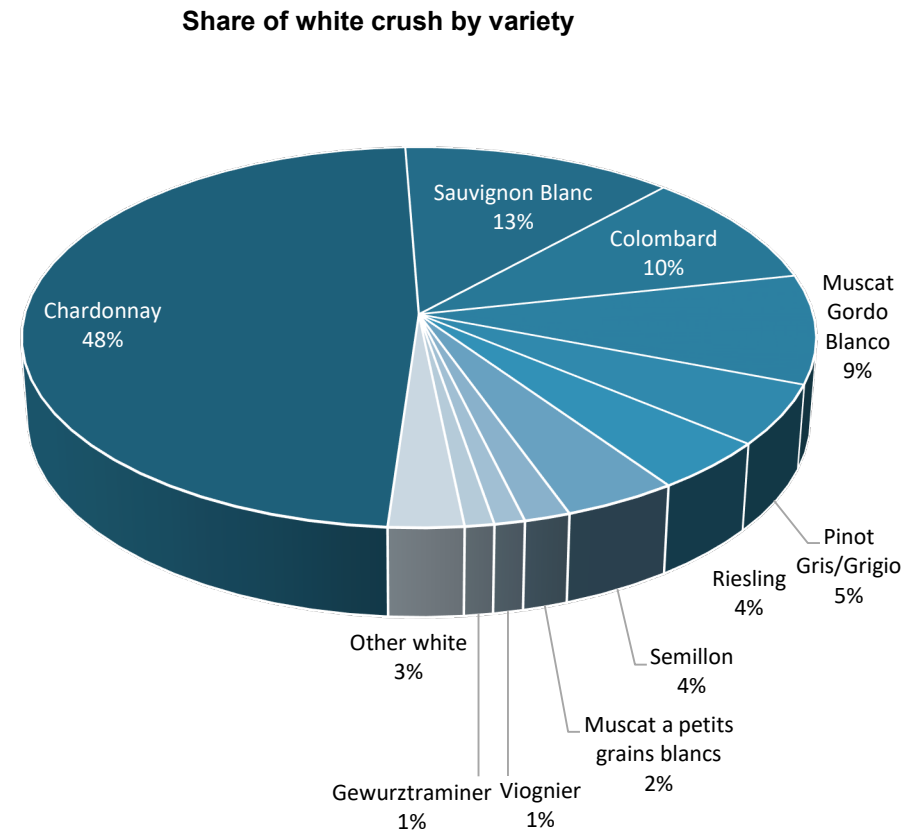
Share of red crush by variety



State summary 2020

Vintage summary by variety 2020 – white winegrapes

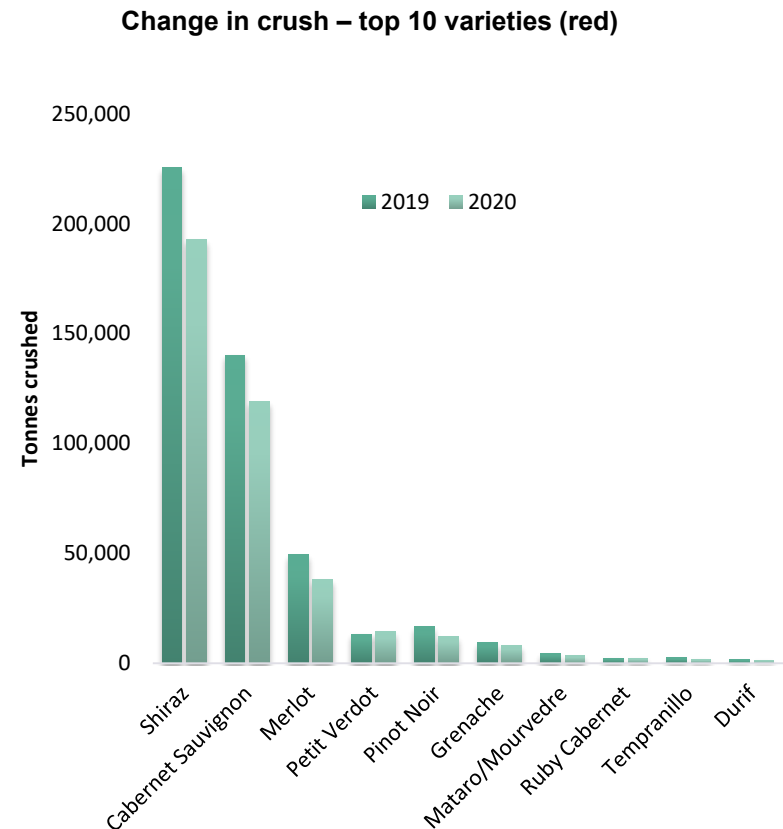
Variety	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2020	Purchased as share of total
White				
Chardonnay	25,800	93,806	119,606	78%
Chenin blanc	8	1,463	1,471	99%
Colombard	3,601	20,673	24,275	85%
Fiano	97	222	318	70%
Gewurztraminer	1,553	1,095	2,648	41%
Gruner Veltliner	179	73	252	29%
Marsanne	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

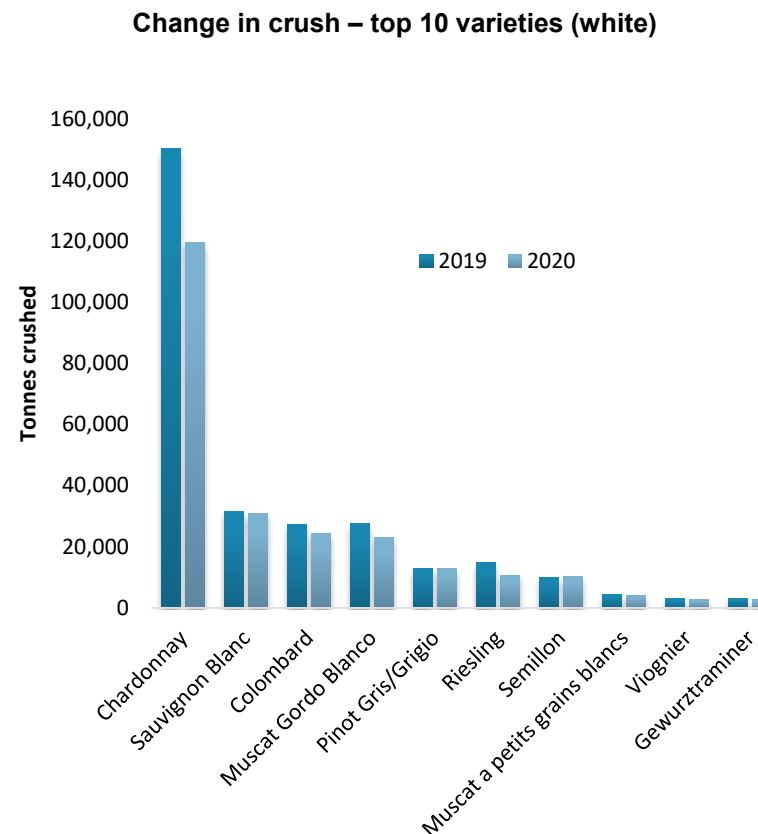
	2019	2020	% change
Red			
Shiraz	225,520	192,748	-15%
Cabernet Sauvignon	140,262	119,265	-15%
Merlot	49,404	37,999	-23%
Petit Verdot	13,188	14,319	9%
Pinot Noir	16,520	12,183	-26%
Grenache	9,400	8,199	-13%
Mataro/Mourvedre	4,516	3,547	-21%
Ruby Cabernet	2,301	2,337	2%
Tempranillo	2,493	1,813	-27%
Durif	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

	Year planted					
Variety	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					
	Pre-2017	2017	2018	2019	Total area	% planted in 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

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.

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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:

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