


Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCan, Esri Japan, METI, Esri China (Hong Kong), Esri Korea, Esri (Thailand), NGCC, (c) OpenStreetMap contributors, and the GIS User Community

DATUM: GDA2020
 PROJECTION: SA Lambert
 DATE: 28 November 2019
 SOFTWARE: ESRI ArcGIS v10.7.1
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

Adelaide Hills Wine Region

 **VINEHEALTH AUSTRALIA**
 DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth 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.

SA Winegrape Crush Survey 2022

Regional Summary Report

Adelaide Hills Wine Region

Wine Australia July 2022

Adelaide Hills

Vintage overview

VINTAGE REPORT

Vintage 2022 was welcomed for its long cool ripening and the absence of serious consequences from the forecast La Niña influence. Although crop loads were down on those harvested in 2021, they were generally close to average and ripened well with the benefit of good-sized canopies.

Full soil moisture profiles and mild and dry conditions in September encouraged an even budburst across the region. However, cool to cold temperatures though October (lowest average maximum for October for this millennium) and November delayed flowering and fruit set. Cool conditions affected pollen tube development in early flowering varieties resulting in poor set (hen and chicken) particularly in Pinot Noir and some Chardonnay crops. Wet conditions in mid-November raised concerns for the potential for downy mildew and Botrytis, particularly as the forecast for La Niña was ongoing.

Temperatures in the summer months were just below average and there were only 5 days over 35°C and none above 40°C for both Summer and Autumn. Rainfall in late January caused ongoing concerns for the small numbers of growers with lingering downy mildew control issues but was otherwise welcome as it was the last significant rainfall before harvest. Conditions during vintage were mild and dry and cool nights enhanced flavour development. The unseasonably cool Spring conditions resulted in harvest being later than usual and the last of the red grape harvest lingered into May.

Growers and Winemakers alike were pleased that the La Niña forecast did not come to fruition. The clean and full-flavoured harvest should enhance the Adelaide Hills Wine Region cool climate reputation.

*Richard Hamilton, Hamilton Viticulture Pty Ltd
On behalf of Adelaide Hills Wine Region Inc.*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Adelaide Hills winegrapes in 2022 was 20,327 tonnes, down by 32 per cent compared with the 2021 near-record crush of 30,047 tonnes. Over the past five years (up to 2021), the average crush for the Adelaide Hills has been 22,557 tonnes, making this year's crush 10 per cent below the five-year average.

There were 94 respondents to the survey who reported crushing grapes from the Adelaide Hills in 2022, compared with 104 in 2021.

The total value of winegrapes in 2022 decreased by \$13 million (25 per cent) to \$39 million, with the decreased production partly offset by an increase in the average purchase value of grapes, which was up by 12 per cent from \$1718 to \$1928 per tonne.

There were increases in average prices for the three largest varieties: Pinot Noir up by 11 per cent to \$2221 per tonne, Sauvignon Blanc up 17 per cent to \$1773 per tonne and Chardonnay up by 14 per cent to \$2036 per tonne.

The price dispersion data shows an upward shift in prices paid, with 37 per cent of all grapes being purchased at \$2000 per tonne or above compared with 24 per cent in 2021.

There were 23 hectares of new vines planted in the region in the 2021–22 season compared with 30 hectares in the previous season. Just under half of the new plantings were Pinot Noir (10 hectares).

The total vineyard area in the Adelaide Hills as at 30 April 2022 was 3707 hectares – a small net reduction (18 hectares) since 2021 and 141 hectares less than the total area five years ago.

Adelaide Hills

Winegrape intake summary table – red winegrapes

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Barbera	17	\$39,757	\$2,328	3%	14	45%	31	\$72,662
Cabernet Franc	3				32	92%	35	\$57,121
Cabernet Sauvignon	410	\$655,576	\$1,600	4%	302	42%	712	\$1,139,238
Durif					8	100%	8	\$10,652
Grenache	4						4	\$8,816
Malbec	5						5	\$9,467
Mataro/Mourvedre					3	100%	3	\$5,124
Merlot	329	\$341,690	\$1,041	9%	48	13%	377	\$391,685
Montepulciano	21	\$44,876	\$2,180	4%			21	\$44,876
Nebbiolo	14	\$34,136	\$2,379	16%	37	72%	52	\$122,728
Nero d'Avola	10	\$21,657	\$2,127	0%			10	\$21,657
Pinot Meunier	92	\$198,555	\$2,156	9%			92	\$198,555
Pinot Noir	2,797	\$6,211,689	\$2,221	11%	578	17%	3,375	\$7,495,493
Sangiovese	35	\$67,855	\$1,948	-1%	6	15%	41	\$79,609
Shiraz	736	\$1,371,183	\$1,875	-7%	715	49%	1,451	\$2,711,707
Tempranillo	88	\$183,182	\$2,076	9%	44	33%	132	\$273,890
Other red	53	\$131,583	\$2,460	22%	44	45%	97	\$200,052
Red Total	4,615	\$9,324,808	\$2,022	9%	1,831	28%	6,446	\$12,843,333

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

Adelaide Hills

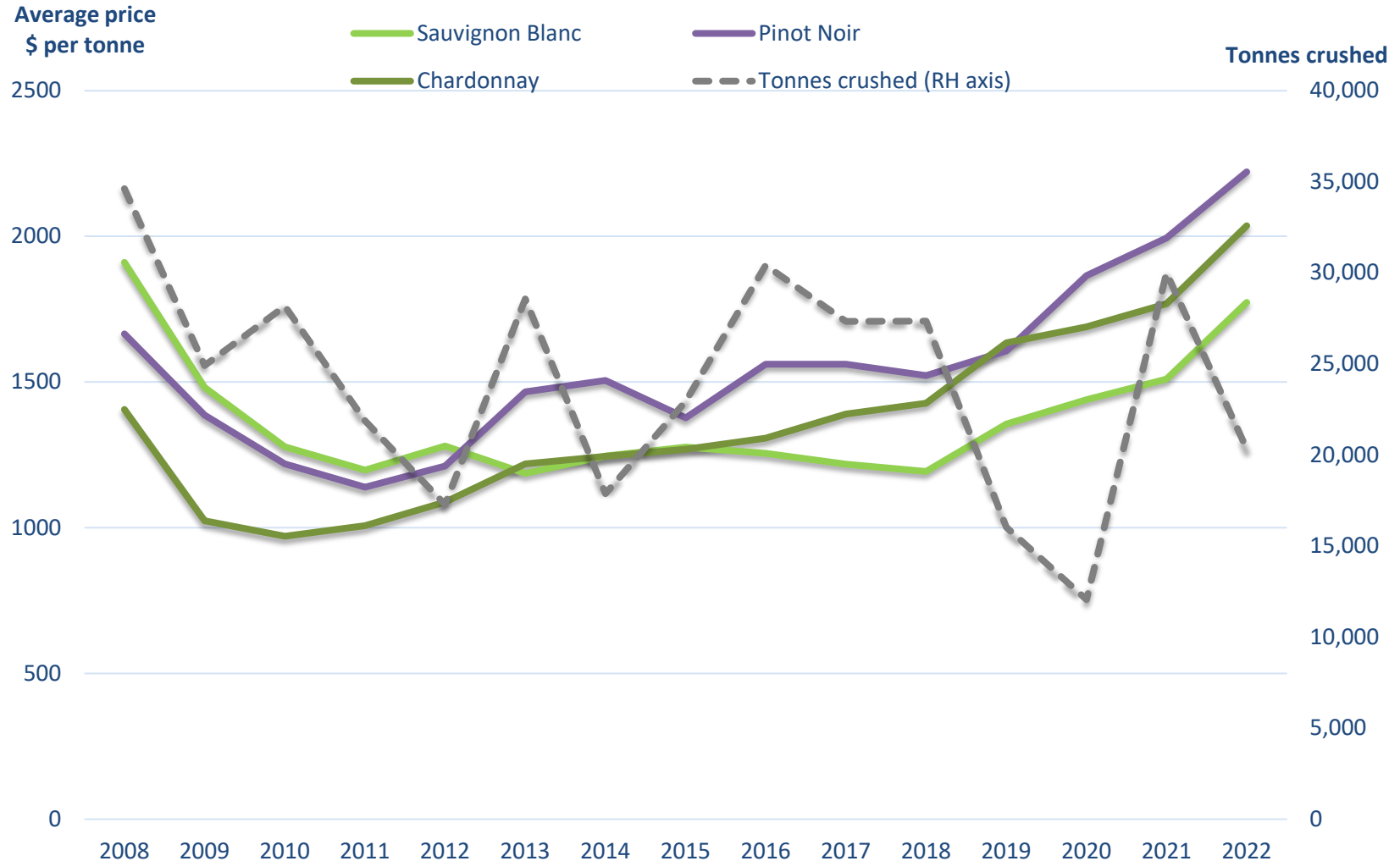
Winegrape intake summary table – white winegrapes

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
White								
Chardonnay	4,196	\$8,541,540	\$2,036	14%	931	18%	5,128	\$10,437,430
Chenin blanc	2						2	\$3,968
Fiano	13	\$26,566	\$2,042	0%	3	16%	16	\$31,672
Gewürztraminer	47	\$92,573	\$1,965	64%	1	1%	48	\$93,732
Grüner Veltliner	64	\$146,212	\$2,286	16%	87	57%	151	\$344,660
Muscat à Petits Grains Blancs	5						5	\$3,042
Pinot Gris/Grigio	1,095	\$2,008,675	\$1,835	10%	397	27%	1,492	\$2,737,649
Prosecco	26	\$30,628	\$1,188	0%	25	50%	51	\$60,818
Riesling	207	\$369,817	\$1,787	13%	47	19%	254	\$453,954
Sauvignon Blanc	4,677	\$8,294,298	\$1,773	17%	1,810	28%	6,487	\$11,504,594
Semillon	70	\$121,740	\$1,744	34%	28	29%	98	\$171,141
Vermentino	9						9	\$11,076
Viognier	15	\$22,738	\$1,470	22%	14	48%	30	\$43,840
Other white	28	\$50,830	\$1,811	2%	82	74%	110	\$232,438
White Total	10,455	\$19,723,703	\$1,887	15%	3,426	25%	13,881	\$26,130,013
Grand Total	15,070	\$29,048,510	\$1,928	12%	5,257	26%	20,327	\$38,973,346

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

Adelaide Hills

Historical weighted average price vs tonnes crushed



Adelaide Hills

Price dispersion – purchased grapes (red)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera					17	17
Cabernet Franc				3		3
Cabernet Sauvignon	42	8	46	219	95	410
Grenache					4	4
Malbec				5	0	5
Merlot		10	293	20	6	329
Montepulciano					21	21
Nebbiolo					14	14
Nero d'Avola					10	10
Pinot Meunier				9	83	92
Pinot Noir			37	827	1,933	2,797
Sangiovese				17	18	35
Shiraz		31	104	304	298	736
Tempranillo				30	58	88
Other red				8	45	53
Red total	42	48	481	1,442	2,602	4,615

Adelaide Hills

Price dispersion – purchased grapes (white)

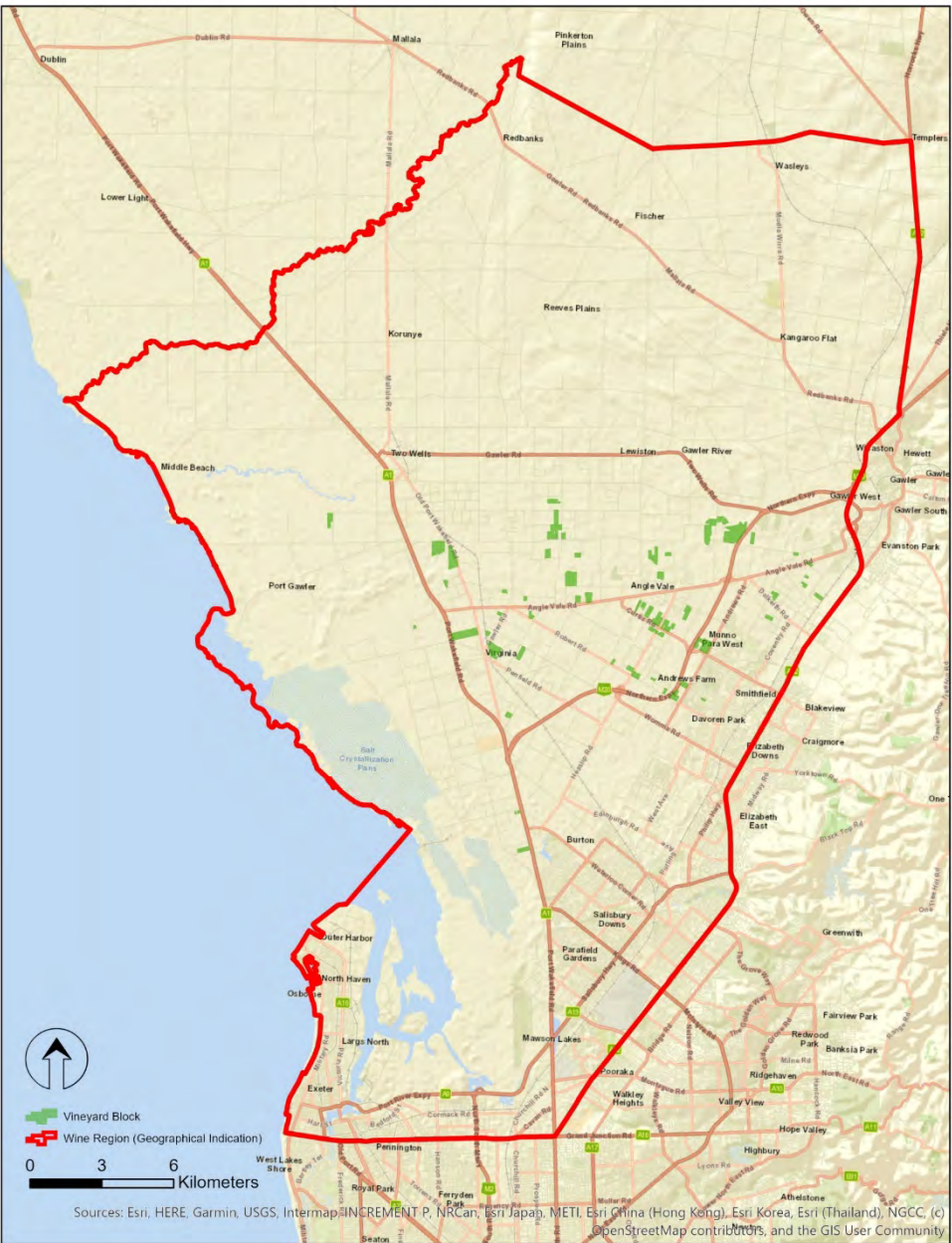
Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
White						
Chardonnay			43	2,563	1,590	4,196
Chenin blanc				2		2
Fiano				5	8	13
Gewürztraminer				27	20	47
Grüner Veltliner				10	54	64
Muscat à Petits Grains Blancs		5				5
Pinot Gris/Grigio			16	803	276	1,095
Prosecco			26			26
Riesling			70	52	85	207
Sauvignon Blanc			425	3,406	847	4,677
Semillon			21	12	37	70
Vermentino			9			9
Viognier			6	9		15
Other white				21	7	28
White total		5	616	6,911	2,923	10,455
Total purchased	42	53	1,097	8,353	5,525	15,070

Adelaide Hills

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2021
	Pre- 2019	2019	2020	2021		
Red winegrapes						
Barbera	6	0	0	0	6	0%
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	200	0	0	0	200	0%
Dolcetto	2	0	0	0	2	0%
Gamay	4	2	1	3	10	30%
Grenache	2	0	0	1	3	33%
Malbec	2	0	1	0	3	0%
Merlot	126	0	0	0	126	0%
Meunier (Pinot Meunier)	22	0	0	0	22	0%
Montepulciano	5	0	0	0	5	0%
Nebbiolo	13	1	0	0	14	2%
Nero d'Avola	3	0	0	0	3	0%
Pinot Noir	647	7	33	10	697	1%
Sangiovese	15	0	0	0	15	0%
Shiraz	388	5	3	2	398	1%
Tempranillo	34	0	0	0	34	0%
Other Red	17	0	0	0	17	0%
Total red varieties	1,492	15	38	16	1,561	1%
White winegrapes						
Arneis	7	0	0	0	7	0%
Chardonnay	809	4	9	2	824	0%
Fiano	9	0	0	0	9	0%
Gruner Veltliner	20	0	0	1	21	5%
Muscat Gordo Blanco	1	0	0	0	1	0%
Pinot Gris	251	0	2	0	253	0%
Prosecco	5	0	0	0	5	0%
Riesling	46	0	1	3	50	6%
Sauvignon Blanc	850	1	1	1	853	0%
Savagnin	5	1	0	0	6	0%
Semillon	30	0	0	0	30	0%
Traminer (Gewurztraminer)	13	0	2	0	15	0%
Viognier	15	0	0	0	15	0%
Other White	14	1	0	0	15	0%
Total white varieties	2,075	7	15	7	2,104	0%
Rootstock Block	2	0	0	0	2	0%
Unknown variety	40	0	0	0	40	0%
Total all varieties	3,609	22	53	23	3,707	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2022

Regional Summary Report

Adelaide Plains Wine Region

Wine Australia July 2022

DATUM: GDA2020
 PROJECTION: SA Lambert
 DATE: 28th November 2019
 SOFTWARE: ESRI ArcGIS v10.7.1
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

Adelaide Plains Wine Region



DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth 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.

Adelaide Plains

Winegrape intake summary table

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Cabernet Sauvignon	151	\$87,956	\$584	-38%			151	\$87,956
Durif	4						4	\$9,904
Graciano	4						4	\$7,211
Grenache	115	\$121,005	\$1,051	0%	8	6%	123	\$129,359
Mataro/Mourvedre	77	\$113,386	\$1,465	0%			77	\$113,386
Merlot	67						67	\$54,471
Montepulciano	5						5	\$8,422
Pinot Noir	21						21	\$25,349
Sangiovese	2						2	\$3,680
Shiraz	1,028	\$1,007,596	\$980	-11%	2	0%	1,029	\$1,009,410
Tempranillo	24	\$37,078	\$1,549	0%			24	\$37,078
Other red	2						2	\$4,320
Red Total	1,501	\$1,480,377	\$986	-9%	10	1%	1,510	\$1,490,545
White								
Chardonnay	98						98	\$108,306
Chenin blanc	19						19	\$7,696
Muscat Gordo Blanco					1	100%	1	\$1,309
Pinot Gris/Grigio	186						186	\$214,101
Sauvignon Blanc	48						48	\$55,453
Viognier	36						36	\$50,876
Other white					2	100%	2	\$3,399
White Total	388				4	1%	392	\$441,140
Grand Total	1,889	\$1,916,809	\$1,015	-6%	13	1%	1,902	\$1,931,686

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

Adelaide Plains

Price dispersion – purchased grapes

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Cabernet Sauvignon	123	20		8		151
Durif				1	3	4
Graciano				4		4
Grenache		14	95		6	115
Mataro/Mourvedre	17		1	60		77
Merlot		65	2			67
Montepulciano				2	3	5
Pinot Noir			21			21
Sangiovese				2		2
Shiraz	159	438	179	234	18	1,028
Tempranillo			15	9		24
Other red					2	2
Red Total	299	538	312	319	32	1,501
White						
Chardonnay			98			98
Chenin blanc	19					19
Pinot Gris/Grigio			186			186
Sauvignon Blanc			48			48
Viognier			36			36
White Total	19		369			388
Total purchased	318	538	681	319	32	1,889

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

Adelaide Plains

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2021
	Pre-2019	2019	2020	2021		
Red winegrapes						
Cabernet Sauvignon	49	2	0	0	51	0%
Grenache	20	0	0	0	20	0%
Mataro (Mourvedre)	7	0	0	0	7	0%
Merlot	19	0	0	0	19	0%
Pinot Noir	13	0	0	0	13	0%
Sangiovese	5	0	0	0	5	0%
Shiraz	153	0	1	2	156	1%
Other Red	13	0	0	0	13	0%
Total red varieties	279	2	1	2	284	1%
White winegrapes						
Chardonnay	26	0	0	0	26	0%
Colombard	1	0	0	0	1	0%
Pinot Gris	32	0	0	0	32	0%
Riesling	1	0	0	0	1	0%
Sauvignon Blanc	16	0	0	0	16	0%
Other White	7	0	0	0	7	0%
Total white varieties	83	0	0	0	83	0%
Unknown variety	12	0	0	0	12	0%
Total all varieties	374	2	1	2	379	1%

Source:
Vinehealth
Australia