

SA Winegrape Crush Survey 2022

Regional Summary Report

Barossa Valley Wine Region

Wine Australia July 2022

DATUM: GDA2020
 PROJECTION: SA Lambert
 DATE: 27th April 2022
 SOFTWARE: ESRI ArcGIS v10.7.1
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

Barossa Valley Wine Region



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Barossa Valley

Vintage overview

VINTAGE REPORT

Across the Barossa Valley, weatherwise, the 2022 vintage growing season was quite average. The 2021 winter was the wettest winter recorded at Nuriootpa Weather Station since 1996. The wet winter was welcomed after the previous 3 years where the rainfall tally did not reach 200mm. October and November also presented rainfall totals above average. Some windy and damp weather in November led to a poor set in some varieties and vineyards. The forecast and expected summer rains from La Niña did not eventuate, to most growers' relief. A large rain event at the end of February assisted in freshening up the vines leading into harvest.

On the 28th of October there was a severe hailstorm that decimated some vineyards as it came through the central Barossa Valley. Many vines lost whole shoots and bunches with cane pruned vines being the most affected. The vines recovered a few weeks later and secondary shoots grew but these were typically less fruitful than primary shoots. The bunches that remained for the most part were relatively unscathed with good set. However, harvest was delayed as the fruit developed later and there was second crop present.

During February as the grapes entered their final ripening period weather conditions were balmy and temperatures below average. There was only one period where there were 3 consecutive days above 35°C but the temperature did not reach 40°C this summer at Nuriootpa. On the 28th of February another severe storm came through the Barossa, this time hitting some of the northern vineyards, bringing more damaging hail and rain.

The ongoing resilience of growers has seen them rewarded for the efforts this year. Some affected by the early hail have ripened second crops successfully, some even had average to above average crops in varieties such as Grenache.

Yalumba Vineyard Manager/Viticulturist Brooke Howell on behalf of Barossa Australia.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Barossa Valley winegrapes (including Barossa zone – other) was 49,640 tonnes in 2022, 20 per cent below the above-average 2021 reported crush of 61,741 tonnes. Over the past five years (up to 2021), the average crush for the Barossa Valley has been 52,464 tonnes, making this year's crush only 5 per cent below the five-year average.

There were 88 respondents to the survey who reported crushing grapes from the Barossa Valley in 2022, compared with 86 in 2021.

The total estimated value of winegrapes in 2022 was just over \$101 million compared with \$140.5 million in 2021. The lower production was compounded by a 10 per cent overall decrease in the average purchase value of grapes, which decreased from \$2261 to \$2033 per tonne.

The major red varieties declined in average value, with the exception of Grenache, which was up 1 per cent to \$2384 per tonne, and Mataro/Mourvedre (up 4 per cent to \$2246 per tonne). Shiraz decreased by 11 per cent to \$2224 per tonne while Cabernet Sauvignon overtook Shiraz in average value for the first time.

The price dispersion data shows a downward shift, with 51 per cent of red varieties purchased at \$2000 and above, compared with 73 per cent in 2021.

According to Vinehealth Australia data, the total vineyard area in the Barossa Valley as at 30 April 2022 was 11,941 hectares, including 216 hectares in Barossa zone – other. This is about 400 hectares more than it was 5 years ago.

There were 88 hectares of new vines planted in the region in the 2021-22 season (including top-working and replacements). Of these, there were 57 hectares of Shiraz and 19 hectares of Grenache planted.

Barossa Valley

Barossa Valley* winegrape intake summary table – red varieties

* Includes Barossa zone other – 1067 tonnes

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	4						4	\$7,636
Cabernet Franc	45				8	15%	52	\$68,594
Cabernet Sauvignon	4,444	\$8,720,721	\$1,962	-13%	4,033	48%	8,477	\$16,624,279
Durif	66	\$126,765	\$1,925	-12%	7	9%	72	\$139,520
Graciano	12				18	60%	29	\$43,422
Grenache	2,161	\$5,156,095	\$2,386	1%	1,015	32%	3,177	\$7,576,740
Lagrein					0	100%	0	\$361
Malbec	55	\$114,291	\$2,064	0%	39	41%	94	\$195,031
Mataro/Mourvedre	660	\$1,482,417	\$2,246	4%	425	39%	1,086	\$2,437,757
Merlot	372	\$480,580	\$1,292	-9%	680	65%	1,052	\$1,358,263
Montepulciano	44	\$87,178	\$1,977	0%	66	60%	111	\$218,489
Muscat à Petits Grains Rouges	5				20	82%	25	\$19,692
Nebbiolo					4	100%	4	\$11,078
Nero d'Avola	2				13	84%	15	\$30,504
Petit Verdot	20	\$33,911	\$1,739	-8%	53	73%	72	\$126,062
Pinot Meunier					3	100%	3	\$5,148
Pinot Noir	120	\$164,417	\$1,368	58%	5	4%	125	\$170,894
Sangiovese	284	\$437,684	\$1,539	7%	34	11%	318	\$489,865
Shiraz	17,509	\$38,902,995	\$2,222	-11%	12,567	42%	30,076	\$66,656,764
Tempranillo	177	\$323,932	\$1,833	-4%	85	32%	262	\$479,543
Touriga Nacional	3				48	94%	51	\$101,833
Other red	217	\$333,893	\$1,540	4%	283	57%	500	\$745,238
Red Total	26,200	\$56,463,235	\$2,155	-10%	19,406	43%	45,606	\$97,506,712

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

Barossa Valley

Barossa Valley* winegrape intake summary table – white varieties

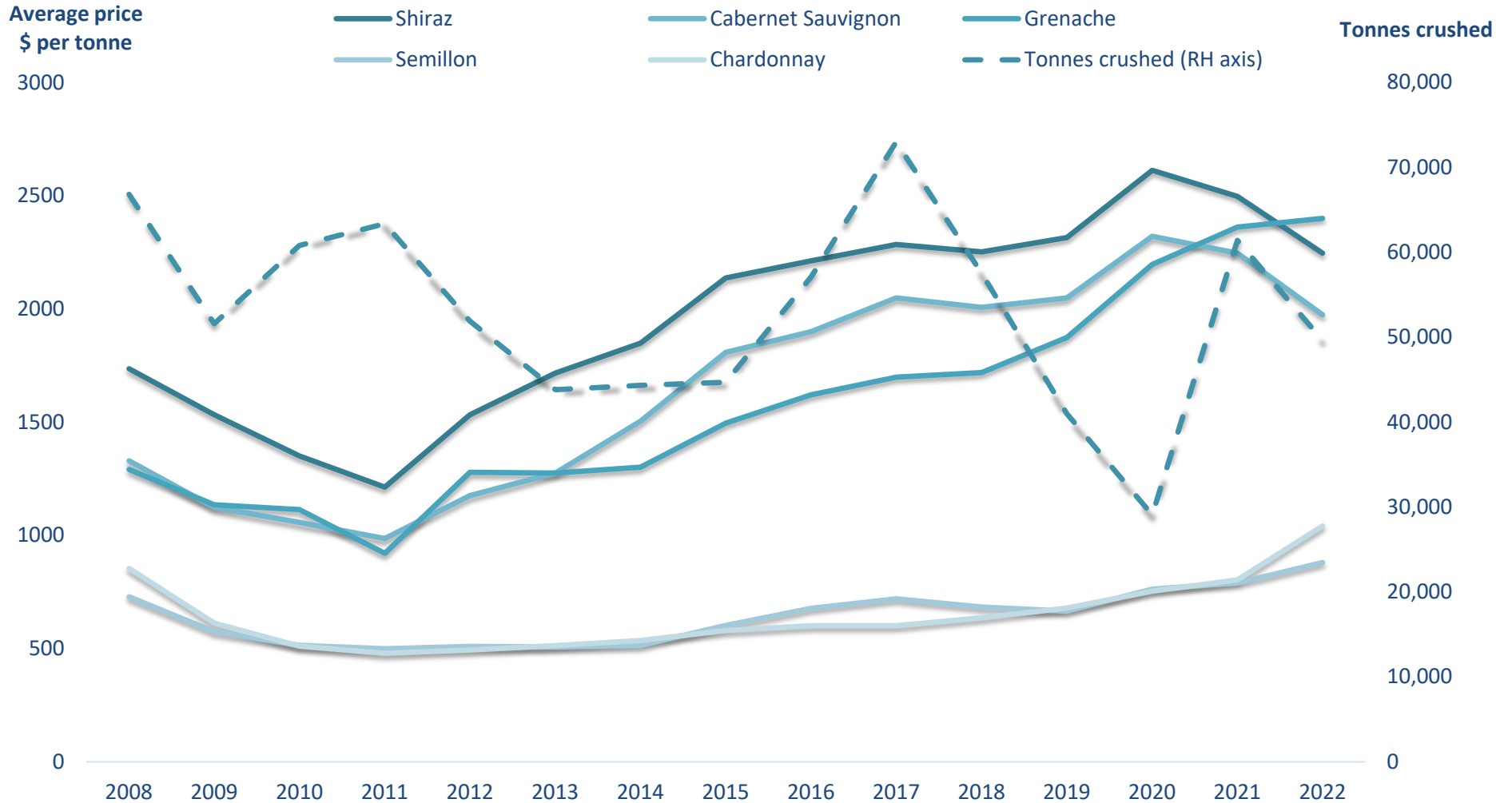
* Includes Barossa zone other – 0 tonnes

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	1,078	\$882,892	\$819	2%	438	29%	1,517	\$1,241,660
Chenin blanc	14				6	31%	20	\$29,972
Fiano					18	100%	18	\$29,661
Gewürztraminer	15				1	5%	16	\$11,326
Marsanne	12	\$20,507	\$1,666	-6%	40	76%	52	\$87,089
Muscat à Petits Grains Blancs	135	\$134,231	\$994	-7%	96	42%	231	\$229,601
Pinot Gris/Grigio	102	\$112,918	\$1,110	4%	42	29%	144	\$160,012
Riesling	392	\$358,386	\$915	-6%	68	15%	460	\$420,924
Roussanne	20				5	22%	25	\$42,097
Sauvignon Blanc	201				37	16%	238	\$237,215
Semillon	723	\$645,834	\$894	13%	231	24%	954	\$852,402
Vermentino	48				7	13%	55	\$55,269
Viognier	166	\$242,155	\$1,455	7%	21	11%	187	\$272,766
Other white	30	\$50,939	\$1,689	-3%	86	74%	116	\$208,774
White Total	2,937	\$2,760,887	\$940	1%	1,097	27%	4,034	\$3,878,766
Grand Total	29,136	\$59,224,122	\$2,033	-10%	20,503	41%	49,640	\$101,385,478

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

Barossa Valley

Historical weighted average price vs tonnes crushed



Barossa Valley

Price dispersion – purchased grapes (red)

Tonnes purchased in each segment							
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	No price	Total purchased
Red							
Barbera					4		4
Cabernet Franc			33	12	0		45
Cabernet Sauvignon		61	330	2,446	1,608		4,444
Durif			23	6	37		66
Graciano			7	5			12
Grenache			64	255	1,842		2,161
Malbec				22	34		55
Mataro/Mourvedre			5	145	510		660
Merlot	42		183	105	41		372
Montepulciano			8	14	21		44
Muscat à Petits Grains Rouges		4	0				5
Nero d'Avola				1	1		2
Petit Verdot			5	9	6		20
Pinot Noir			75		45		120
Sangiovese			241	11	32		284
Shiraz		216	1,488	6,743	9,063		17,509
Tempranillo			26	120	31		177
Touriga Nacional						3	3
Other red			110	77	29		217
Red Total	42	280	2,599	9,970	13,304	3	26,200

Barossa Valley

Price dispersion – purchased grapes (white)

Tonnes purchased in each segment							
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	No price	Total purchased
White							
Chardonnay		816	256	7			1,078
Chenin blanc			4	10			14
Gewürztraminer		15					15
Marsanne				9	4		12
Muscat à Petits Grains Blancs		20	115				135
Pinot Gris/Grigio		31	71				102
Riesling		140	238	14			392
Roussanne				20			20
Sauvignon Blanc		3	198				201
Semillon	34	409	232	40	5	2	723
Vermentino			43	5			48
Viognier			23	139	3	2	166
Other white		2	10	9	9		30
White total	34	1,436	1,188	253	21	4	2,937
Total purchased	77	1,717	3,787	10,223	13,325	7	29,136

Barossa Valley

Barossa Valley* current plantings by variety and year planted – red varieties

* Includes Barossa zone other – 216 hectares

Variety	Area (hectares)				Total 2021 area (Ha)	% planted in 2021
	Pre-2019	2019	2020	2021		
Red winegrapes						
Aglianico	2	0	0	0	2	0%
Alicante Bouschet	15	0	0	0	15	0%
Barbera	3	0	0	0	3	0%
Cabernet Franc	24	0	0	0	24	0%
Cabernet Sauvignon	1,610	62	38	6	1,716	0%
Carignan	8	0	0	0	8	0%
Cinsault	6	0	0	0	6	0%
Durif (Petite Sirah)	20	1	0	0	21	0%
Graciano	8	0	0	0	8	0%
Grenache	629	22	51	19	721	3%
Malbec	27	0	1	0	28	0%
Mataro (Mourvedre)	294	8	7	4	313	1%
Merlot	223	0	0	0	223	0%
Meunier (Pinot Meunier)	2	0	0	0	2	0%
Montepulciano	15	1	0	0	16	0%
Muscat A Petit Grains Rouge	1	0	0	0	1	0%
Nebbiolo	2	1	0	0	3	0%
Nero d'Avola	8	3	0	0	11	0%
Petit Verdot	17	0	0	0	17	0%
Pinot Noir	30	0	0	0	30	0%
Sangiovese	27	0	0	0	27	0%
Saperavo	6	0	0	0	6	0%
Shiraz	7,449	145	53	57	7,704	1%
Tannat	2	0	0	0	2	0%
Tempranillo	80	0	1	0	81	0%
Touriga	16	3	0	0	19	0%
Zinfandel	13	0	0	0	13	0%
Other Red	23	4	0	0	27	0%
Total red varieties	10,560	250	151	86	11,047	1%

Source:
Vinehealth
Australia

Barossa Valley

Barossa Valley* current plantings by variety and year planted – white varieties

* Includes Barossa zone other – 0 hectares (white)

Variety	Area (hectares)				Total area (Ha)	% planted in 2021
	Pre-2019	2019	2020	2021		
White winegrapes						
Chardonnay	236	0	0	0	236	0%
Chenin Blanc	10	0	0	0	10	0%
Fiano	3	1	0	0	4	0%
Marsanne	9	0	0	0	9	0%
Muscadelle (Tokay)	11	0	0	0	11	0%
Muscat A Petit Grains Blanc (White Frontignac)	42	0	0	0	42	0%
Muscat Gordo Blanco	1	0	0	0	1	0%
Palomino	3	0	0	0	3	0%
Pedro Ximenez	5	0	0	0	5	0%
Pinot Gris	11	0	0	0	11	0%
Riesling	120	0	0	0	120	0%
Roussanne	3	0	0	0	3	0%
Sauvignon Blanc	40	0	1	0	41	0%
Semillon	235	0	0	0	235	0%
Traminer (Gewurztraminer)	5	0	0	0	5	0%
Vermentino	8	0	0	0	8	0%
Viognier	42	0	0	0	42	0%
Other White	14	2	1	2	19	11%
Total white varieties	798	3	2	2	805	0%
Unknown variety	87	0	0	0	87	0%
Rootstock block	1	0	0	0	1	0%
Table grapes	1	0	0	0	1	0%
Total all varieties	11,447	253	153	88	11,941	1%

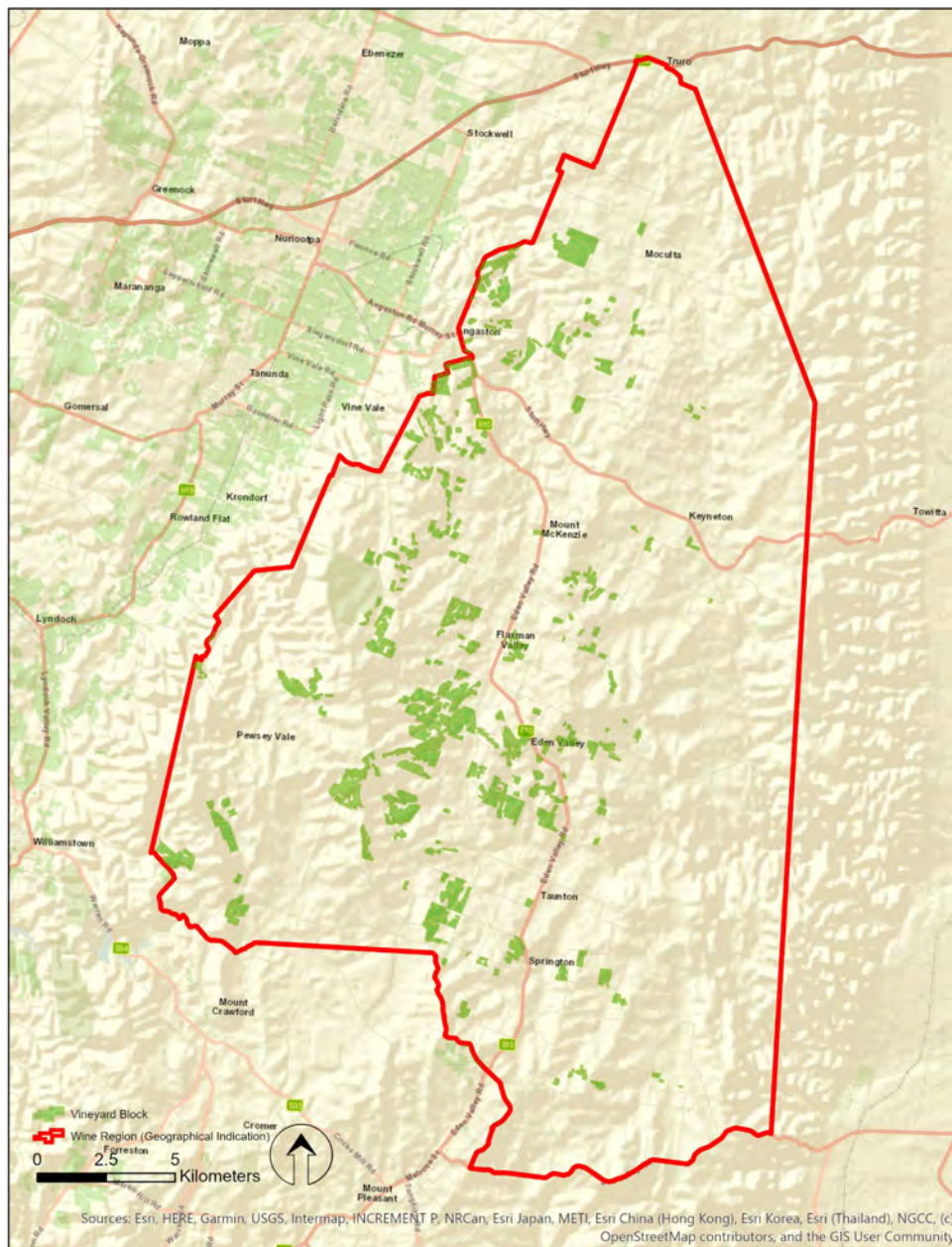
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2022

Regional Summary Report

Eden Valley Wine Region

Wine Australia July 2022



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

Eden Valley Wine Region



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Eden Valley

Vintage overview

VINTAGE REPORT

Like the neighbouring Barossa Valley, the weather statistics for the Eden Valley were close to average overall but varied considerably across the region. Winter was wet, welcomed by all after a dry couple of years as the dams and soils filled. Good falls of over 100mm were recorded in both June and July, with July being 70% higher than average. Rainfall was also good in October and November, meaning soil moisture in the profile was at field capacity and the beginning of the irrigation season could be delayed until December. There was some rainy and windy weather in November as fruit set, causing lower than average yields for most. Growing season rainfall was 12% below average, in part due to a very dry December, February and March where less than 10mm was recorded for each month.

Maximum temperatures for the beginning of the season were generally on average or slightly below. This trend continued into summer with the absence of warm days; February's maximum temperature was 1.1°C below average, which was similar to the previous 2 years. Minimum temperatures followed a similar trend with October and November being 1.5°C and 1.8°C cooler than average.

The 28th of October storm that damaged parts of the Barossa Valley also hit some vineyards in Eden Valley. Those the hail missed, and some it didn't, have ripened low but intense crops that have delicious flavours and delightful natural acidity.

Mild conditions in January and February provided perfect ripening conditions as the fruit moved through veraison. With the absence of severe heatwaves, the acid held in the grapes for a prolonged period and resulted in a vintage that was less compressed than previous years, lowering the stress levels of winemakers and viticulturists alike.

Yalumba Vineyard Manager/Viticulturist Brooke Howell on behalf of Barossa Australia.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Eden Valley winegrapes was 6842 tonnes in 2022, a decrease of 29 per cent compared with the 2021 vintage. Over the past five years (up to 2021), the average crush for Eden Valley has been 8482 tonnes, making this year's crush 19 per cent below the five-year average.

There were 39 respondents to the survey who reported crushing grapes from Eden Valley in 2022, compared with 41 in 2021.

The total estimated value of winegrapes in 2022 decreased from just under \$21 million to \$14 million (a 32 per cent decrease), as a result of the lower production combined with a small overall decrease in the average purchase value of grapes, which decreased by 5 per cent from \$2191 to \$2085 per tonne.

There were decreases in average value for the major reds; Shiraz was down 4 per cent to \$2640 per tonne and Cabernet Sauvignon was down 6 per cent to \$2263 per tonne. Chardonnay also decreased – down 5 per cent to \$1605 per tonne; however, Riesling was up 4 per cent to \$1944 per tonne.

The price dispersion also showed a downward shift, with 43 per cent of all varieties purchased at \$2000 and above, compared with 54 per cent in 2021.

According to Vinehealth Australia data, there were 18 hectares of new vines planted in the 2021–2022 season, compared with just 9 hectares in the 2020-21 season. Of the new plantings, 8 hectares were Grenache, which resulted in a 28 per cent increase in the total area of this variety.

The total vineyard area in Eden Valley as at 30 April 2022 was 2313 hectares, approximately 30 hectares less than it was five years ago.

Eden Valley

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								
Barbera					1	100%	1	\$2,616
Cabernet Franc	12				35	74%	48	\$119,175
Cabernet Sauvignon	179	\$404,149	\$2,263	-6%	760	81%	939	\$2,123,988
Durif					10	100%	10	\$13,491
Graciano					4	100%	4	\$6,558
Grenache	27	\$95,519	\$3,558	24%	6	18%	33	\$117,008
Lagrein					3	100%	3	\$3,923
Malbec					1	100%	1	\$940
Mataro/Mourvedre	7				54	89%	61	\$158,530
Merlot	57	\$77,198	\$1,350	8%	159	74%	216	\$291,556
Montepulciano	4				14	79%	18	\$36,834
Nebbiolo					1	100%	1	\$3,532
Nero d'Avola	1						1	\$2,300
Petit Verdot					31	100%	31	\$35,399
Pinot Noir	79	\$122,562	\$1,549	15%	65	45%	144	\$222,580
Shiraz	1,071	\$2,827,260	\$2,640	-4%	848	44%	1,919	\$5,066,286
Tempranillo	15				20	57%	34	\$100,539
Other red	3				24	90%	27	\$39,281
Red Total	1,454	\$3,631,919	\$2,498	-3%	2,036	58%	3,490	\$8,344,537
White								
Chardonnay	425	\$682,082	\$1,605	-5%	400	48%	825	\$1,324,279
Gewürztraminer	6				9	59%	15	\$17,022
Grüner Veltliner					6	100%	6	\$11,838
Muscat à Petits Grains Blancs	12	\$11,437	\$954	6%	1	10%	13	\$12,772
Pinot Gris/Grigio	119	\$164,001	\$1,380	-8%	38	24%	157	\$216,161
Riesling	806	\$1,567,606	\$1,944	4%	1,088	57%	1,894	\$3,682,845
Roussanne	20				5	21%	25	\$53,180
Sauvignon Blanc	64	\$66,842	\$1,039	7%	70	52%	135	\$140,097
Semillon	95	\$73,849	\$780	7%	18	16%	113	\$88,101
Viognier	50	\$109,615	\$2,199	19%	60	55%	110	\$242,400
Other white	10				50	84%	59	\$132,982
White Total	1,606	\$2,747,088	\$1,710	3%	1,746	52%	3,352	\$5,921,678
Grand Total	3,060	\$6,379,007	\$2,085	-5%	3,782	55%	6,842	\$14,266,215

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

Eden Valley

Price dispersion – purchased grapes

Varieties	Tonnes purchased in each segment				Total purchased
	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red					
Cabernet Franc				12	12
Cabernet Sauvignon			87	91	179
Grenache				27	27
Mataro/Mourvedre				7	7
Merlot	5	40	12		57
Montepulciano				4	4
Nero d'Avola				1	1
Pinot Noir		44	16	19	79
Shiraz			443	628	1,071
Tempranillo				15	15
Other red		3			3
Red Total	5	87	559	804	1,454
White					
Chardonnay	13	3	361	49	425
Gewürztraminer		6			6
Muscat à Petits Grains Blancs	8	2	1		12
Pinot Gris/Grigio	5	102	12		119
Riesling		10	396	400	806
Roussanne		6		14	20
Sauvignon Blanc		64			64
Semillon	89	4	2		95
Viognier			17	33	50
Other white				10	10
White Total	115	197	788	506	1,606
Total purchased	120	283	1,347	1,310	3,060

Eden Valley

Current plantings by variety and year planted

Variety	Area hectares				Total % planted in	
	Pre-2019	2019	2020	2021	area (Ha)	2021
Red winegrapes						
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	303	42	1	0	346	0%
Grenache	20	1	0	8	29	28%
Mataro (Mourvedre)	15	1	0	0	16	0%
Merlot	50	0	0	0	50	0%
Montepulciano	3	0	0	0	3	0%
Petit Verdot	7	0	0	0	7	0%
Pinot Noir	54	0	0	0	54	0%
Shiraz	773	44	5	2	824	0%
Tempranillo	12	0	0	2	14	14%
Other Red	13	0	0	0	13	0%
Total red varieties	1,256	88	6	12	1,362	1%
White winegrapes						
Chardonnay	240	0	0	0	240	0%
Muscat A Petit Grains Blanc (White Frontignac)	6	0	0	0	6	0%
Pinot Gris	35	0	3	2	40	5%
Riesling	519	2	0	4	525	1%
Sauvignon Blanc	37	0	0	0	37	0%
Semillon	15	0	0	0	15	0%
Traminer (Gewurztraminer)	14	0	0	0	14	0%
Viognier	33	0	0	0	33	0%
Other White	22	1	0	0	23	0%
Total white varieties	921	3	3	6	933	1%
Unknown variety	18	0	0	0	18	0%
Total all varieties	2,195	91	9	18	2,313	1%

Source:
Vinehealth
Australia