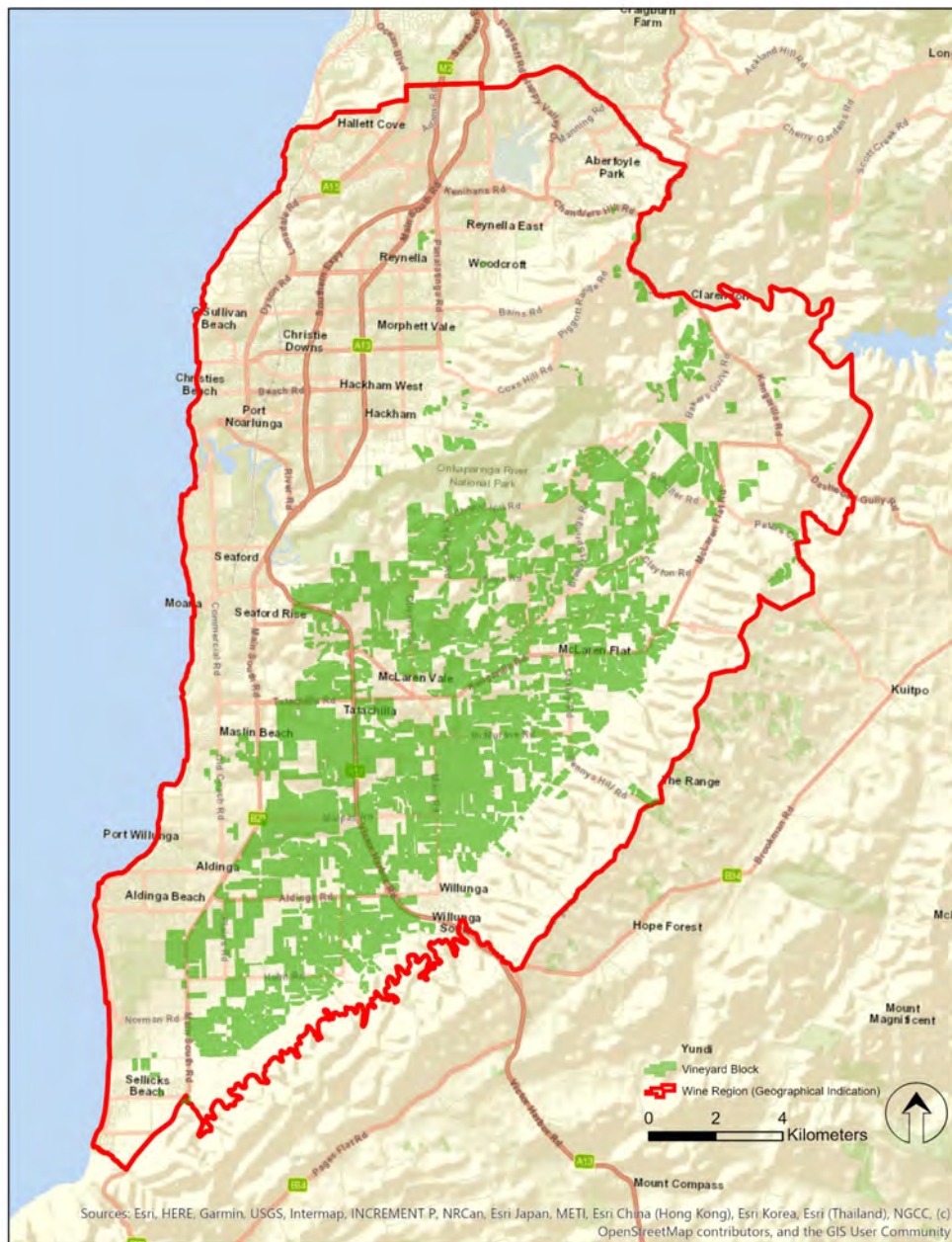


SA Winegrape Crush Survey 2022

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2022



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

McLaren Vale Wine Region



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McLaren Vale

Vintage overview

VINTAGE REPORT

There were key climatic similarities between Vintage 2022 and the preceding Vintage 2021. This bodes well for wine quality as Vintage 2021 is already highly regarded.

Vines held condition well due to a cool summer, and winemaking was made easier by gentle ripening conditions. While it was a wet La Niña-influenced year for other parts of Australia, McLaren Vale vineyards received below average rainfall. Like the previous year, the season started with above average winter and early spring rains, before experiencing dry conditions throughout summer and autumn, leading to lower rainfall overall.

Unfortunately, tonnages were lower than those of 2021. The lower yields were largely due to cold and windy weather during flowering (mid spring). Additionally, November was about 1.5°C cooler than average. This contributed to a lower percentage of berry set, with fewer berries per bunch. Berry set was lowest for vineyards close to the Gulf of St Vincent where they are most exposed to cold south-westerly winds.

Like 2021, the 2022 season had a mild summer without heatwave conditions. January and February 2022 recorded no days above 40°C. The mild summer was followed by a warm autumn. This produced a gentle and slow ripening period and delayed harvest. Both seasons had late Veraison colour change dates, and correspondingly later harvest dates.

Grape picking took eight weeks to complete starting at full pace in the first week of March and ending in the second week of April. Both 2021 and 2022 vintages were drawn out compared with recent experience.

Overall, we would rank Vintage 2022 right up there for quality. Reds have intense, rich and balanced flavours and colours. Whites have pretty aromatics and natural acidity.

James Hook, for McLaren Vale Grape, Wine and Tourism Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from McLaren Vale was 34,990 tonnes in 2022, down by 6 per cent compared with the 2021 reported crush of 37,278 tonnes. The crush was just below the five-year average (2017–2021) of 35,869 tonnes. McLaren Vale moved up to fifth-largest region, overtaking Padthaway and just below Coonawarra.

There were a record 95 respondents to the survey who reported crushing grapes from McLaren Vale in 2022, compared with 86 in 2021. Despite this, it is known that the non-response rate in terms of tonnes is relatively high in this region and the true crush is likely to be closer to 50,000 tonnes.

The total estimated value of winegrapes from McLaren Vale in 2022 was just under \$64 million compared with \$73 million in 2021 – a decrease of 13 per cent. The overall average value declined by 7 per cent from \$1946 per tonne to \$1809 per tonne.

Grenache had the highest average value at \$2290 per tonne (down 1 per cent) followed by Shiraz (down 9 per cent to \$1896 per tonne). Cabernet Sauvignon decreased by 8 per cent to \$1760 per tonne, while the average value for Chardonnay increased by 13 per cent to \$1165 per tonne.

The price dispersion data shows a slight downward shift in prices compared with last year, with 41 per cent of red grapes purchased at \$2000 per tonne and above, compared with 50 per cent last year.

According to Vinehealth Australia data, the total vineyard area in McLaren Vale as at 30 April 2022 is 7377 hectares, compared with 7414 hectares in 2021. The total area is around 60 hectares more than it was 5 years ago.

There were 41 hectares of new plantings (including top-working and replacements) in the 2021-22 planting season, including 12 hectares of Shiraz, 10 hectares of Grenache and 9 hectares of Fiano.

McLaren Vale

Winegrape intake summary table – reds

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				4	18%	21	\$45,870
Cabernet Franc	41	\$74,257	\$1,826	35%	8	16%	48	\$88,095
Cabernet Sauvignon	3,299	\$5,787,047	\$1,760	-8%	3,249	50%	6,547	\$11,505,052
Durif	11	\$18,322	\$1,678	14%	4	28%	15	\$25,570
Graciano	19				23	54%	41	\$95,354
Grenache	945	\$2,163,165	\$2,290	-1%	781	45%	1,726	\$3,951,398
Lagrein	2				4	61%	6	\$9,687
Malbec	29	\$62,520	\$2,143	17%	28	49%	57	\$122,283
Mataro/Mourvedre	318	\$580,509	\$1,824	2%	188	37%	506	\$922,883
Merlot	541	\$683,747	\$1,264	1%	314	37%	855	\$1,080,580
Montepulciano	41	\$84,082	\$2,063	22%	52	56%	93	\$192,008
Muscat à Petits Grains Rouges					22	100%	22	\$27,399
Nebbiolo					8	100%	8	\$20,038
Nero d'Avola	67	\$143,526	\$2,135	-7%	25	27%	92	\$196,956
Petit Verdot	11				147	93%	158	\$241,925
Pinot Noir	314	\$420,172	\$1,340	12%	41	11%	354	\$474,478
Sangiovese	266	\$509,726	\$1,913	17%	194	42%	460	\$880,446
Shiraz	12,317	\$23,307,179	\$1,896	-9%	8,184	40%	20,500	\$38,823,095
Tempranillo	171	\$342,097	\$1,995	4%	166	49%	338	\$673,418
Touriga Nacional	25	\$56,996	\$2,242	7%	70	73%	95	\$213,973
Other red	84	\$167,469	\$1,997	2%	199	70%	283	\$503,235
Red Total	18,518	\$34,502,677	\$1,867	-7%	13,709	43%	32,227	\$60,093,744

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

McLaren Vale

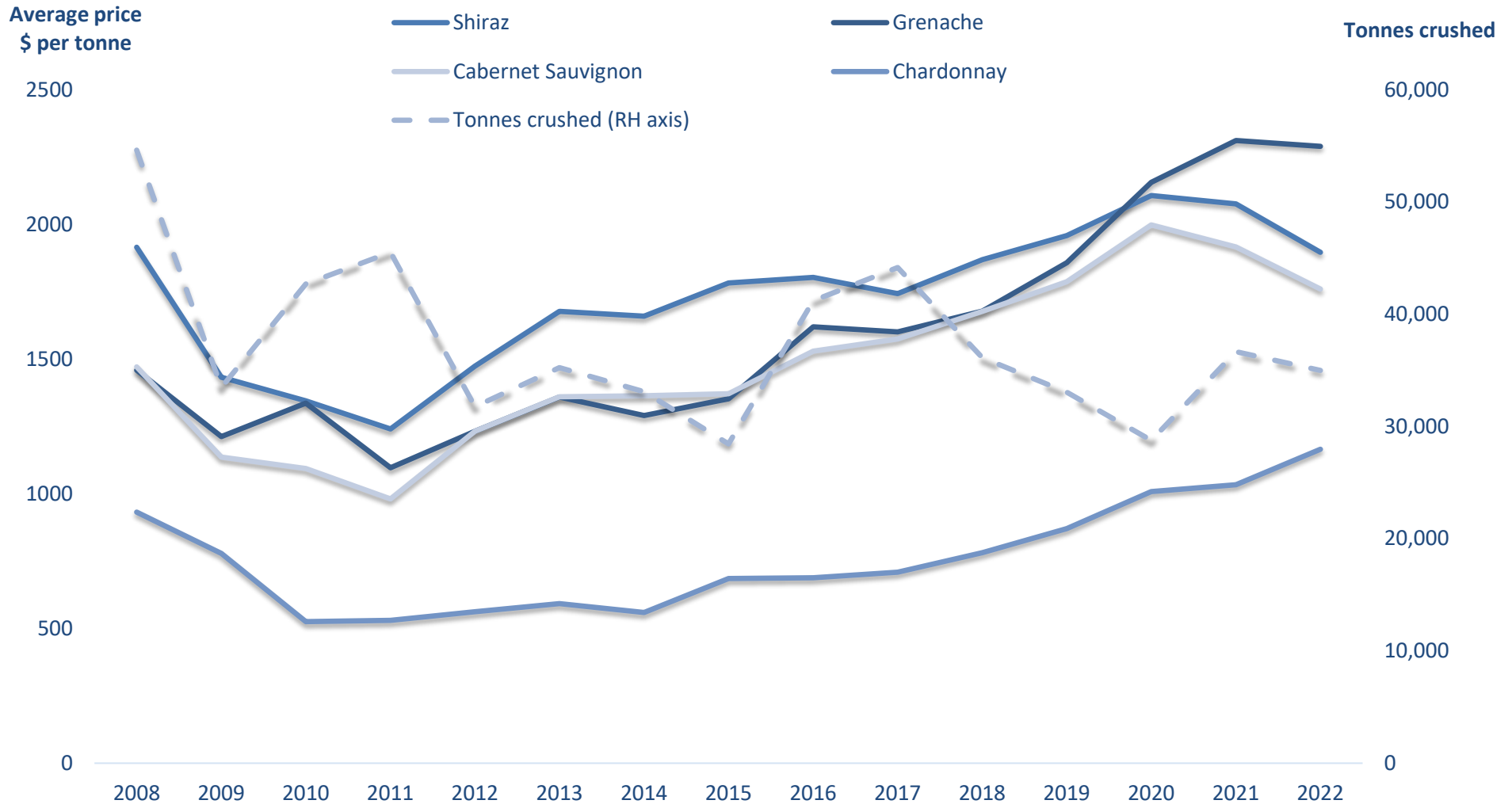
Winegrape intake summary table – whites

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	1,377	\$1,604,478	\$1,165	13%	257	16%	1,634	\$1,903,829
Chenin blanc	45	\$66,903	\$1,478	-2%	28	39%	74	\$108,840
Fiano	49	\$96,765	\$1,959	5%	72	59%	121	\$237,031
Gewürztraminer	6						6	\$7,319
Marsanne	13				30	69%	44	\$69,632
Muscat à Petits Grains Blancs	50	\$61,704	\$1,223	0%	8	14%	59	\$71,962
Pinot Gris/Grigio					112	100%	112	\$147,711
Prosecco	4						4	\$7,403
Riesling	76	\$109,908	\$1,442	11%	14	15%	90	\$129,446
Roussanne					12	100%	12	\$22,115
Sauvignon Blanc	78	\$125,440	\$1,599	46%	100	56%	179	\$285,866
Semillon					56	100%	56	\$62,003
Verdelho	115	\$129,619	\$1,128	0%	15	11%	130	\$146,342
Vermentino	25	\$51,785	\$2,039	-7%	38	60%	63	\$129,136
Viognier	87	\$137,916	\$1,581	4%	59	40%	146	\$230,772
Other white	32	\$64,588	\$1,989	0%	1	4%	34	\$67,807
White Total	1,960	\$2,485,331	\$1,268	9%	803	29%	2,763	\$3,627,213
Grand Total	20,478	\$36,988,009	\$1,809	-7%	14,512	41%	34,990	\$63,720,957

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

McLaren Vale

Historical weighted average price vs tonnes crushed



McLaren Vale

Price dispersion – purchased grapes (reds)

Varieties	Tonnes purchased in each segment					Unspecified	Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000		
Red							
Barbera					17		17
Cabernet Franc			22	7	12		41
Cabernet Sauvignon	35	69	564	1,843	787		3,299
Durif			5	2	4		11
Graciano					19		19
Grenache		0	35	114	795		945
Lagrein				2			2
Malbec				24	5		29
Mataro/Mourvedre		3	20	229	67		318
Merlot		48	358	89	45		541
Montepulciano				5	35		41
Nero d'Avola				27	40		67
Petit Verdot			2	9			11
Pinot Noir			251	35	27		314
Sangiovese				207	59		266
Shiraz	68	372	1,698	4,713	5,436	31	12,317
Tempranillo				67	104		171
Touriga Nacional				1	24		25
Other red				21	63	0	84
Red Total	103	492	2,956	7,398	7,539	31	18,518

McLaren Vale

Price dispersion – purchased grapes (whites)

Varieties	Tonnes purchased in each segment						Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	Unspecified	
Chardonnay		426	770	181			1,377
Chenin blanc			10	35			45
Fiano				18	31		49
Gewürztraminer			6				6
Marsanne				13			13
Muscat à Petits Grains Blancs			47	4			50
Prosecco				4			4
Riesling			23	53			76
Sauvignon Blanc			38		40		78
Verdelho			100	15			115
Vermentino				5	21		25
Viognier		11		77	0		87
Other white				24	8		32
White Total		437	994	429	100		1,960
Total purchased	103	928	3,950	7,826	7,640	31	20,478

McLaren Vale

Current plantings by variety and year planted – reds

Variety	Area (hectares)				Total area % planted	
	Pre-2019	2019	2020	2021	(Ha)	in 2021
Red winegrapes						
Aglianico	3	1	0	1	5	20%
Barbera	13	0	0	0	13	0%
Cabernet Franc	22	0	0	0	22	0%
Cabernet Sauvignon	1,299	11	29	0	1,339	0%
Carignan	5	0	0	0	5	0%
Cinsault	3	0	0	0	3	0%
Durif (Petite Sirah)	5	0	0	0	5	0%
Graciano	5	0	1	0	6	0%
Grenache	452	2	10	10	474	2%
Malbec	13	0	0	0	13	0%
Mataro (Mourvedre)	93	0	0	1	94	1%
Merlot	186	0	0	0	186	0%
Montepulciano	17	2	0	0	19	0%
Nebbiolo	2	0	0	0	2	0%
Nero d'Avola	18	3	0	2	23	9%
Petit Verdot	44	0	0	0	44	0%
Pinot Noir	46	0	0	0	46	0%
Sangiovese	42	0	0	0	42	0%
Saperavi	3	0	0	0	3	0%
Shiraz	4,096	31	63	12	4,202	0%
Tempranillo	65	0	4	4	73	5%
Touriga	20	1	0	0	21	0%
Zinfandel	4	0	0	0	4	0%
Other Red	36	0	0	1	37	3%
Total red varieties	6,492	51	107	31	6,681	0%

Source:
Vinehealth
Australia

McLaren Vale

Current plantings by variety and year planted – whites

Variety	Area (hectares)				Total area % planted	
	Pre-2019	2019	2020	2021	(Ha)	in 2021
White winegrapes						
Chardonnay	277	0	0	0	277	0%
Chenin Blanc	15	0	0	0	15	0%
Colombard	1	0	0	0	1	0%
Fiano	20	8	4	9	41	22%
Muscat A Petit Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris	23	0	0	0	23	0%
Riesling	28	0	0	0	28	0%
Roussanne	12	0	0	0	12	0%
Sauvignon Blanc	39	0	0	0	39	0%
Semillon	17	0	0	0	17	0%
Verdelho	15	0	0	0	15	0%
Vermentino	5	0	1	0	6	0%
Viognier	49	0	0	0	49	0%
Other White	27	2	0	0	29	0%
Total white varieties	538	10	5	9	562	2%
Rootstock Block	4	0	0	0	4	0%
Unknown variety	130	0	0	0	130	0%
Total all varieties	7,164	61	112	40	7,377	1%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2022

Regional Summary Report

Fleurieu zone – other

Wine Australia July 2022

DATUM: GDA2020
 PROJECTION: SA Lambert
 DATE: 21st December 2021
 SOFTWARE: ESRI ArcGIS v10.8.1
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

**Fleurieu
 Wine Zone**



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Fleurieu zone – other

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	264	\$263,948	\$998	-3%			264	\$263,948
Grenache	17						17	\$13,920
Malbec	6						6	\$6,300
Shiraz	499	\$433,765	\$869	-18%			499	\$433,765
Red Total	787	\$717,933	\$912	-14%			787	\$717,933
White								
Chardonnay	377	\$247,395	\$656	-10%			377	\$247,395
Pinot Gris/Grigio	190						190	\$171,432
Prosecco	18						18	\$13,718
Riesling	36						36	\$30,515
Sauvignon Blanc	224	\$215,276	\$961	9%			224	\$215,276
Semillon	46						46	\$36,901
White Total	892	\$715,236	\$801	-5%			892	\$715,236
Grand Total	1,680	\$1,433,168	\$853	-11%			1,680	\$1,433,168

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

Fleurieu zone – other

Price dispersion – purchased grapes

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Cabernet Sauvignon	27		238			264
Grenache		17				17
Malbec			6			6
Shiraz		312	178		9	499
Red Total	27	329	422		9	787
White						
Chardonnay		377				377
Pinot Gris/Grigio			190			190
Prosecco		18				18
Riesling		36				36
Sauvignon Blanc		69	150	5		224
Semillon		46				46
White Total		547	341	5		892
Total purchased	27	876	763	5	9	1,680

Fleurieu zone – other

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	36	0	0	0	36	0%
Grenache	1	0	0	0	1	0%
Shiraz	90	0	0	0	90	0%
Other Red	3	0	0	0	3	0%
Total red varieties	130	0	0	0	130	0%
White winegrapes						
Chardonnay	29	0	0	0	29	0%
Pinot Gris	16	0	0	0	16	0%
Riesling	2	0	0	0	2	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	7	0	0	0	7	0%
Total white varieties	67	0	0	0	67	0%
Unknown variety	34	0	0	0	34	0%
Total all varieties	231	0	0	0	231	0%

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2022

Regional Summary Report

Kangaroo Island Wine Region

Wine Australia July 2022



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

Kangaroo Island Wine Region



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Kangaroo Island

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					37	100%	37	\$50,342
Merlot					8	100%	8	\$7,534
Montepulciano					4	100%	4	\$8,309
Pinot Noir					2	100%	2	\$3,980
Shiraz	8				43	84%	52	\$125,924
Tempranillo	2						2	\$2,660
Red Total	10	\$23,060	\$2,267	0%	95	90%	105	\$198,748
White								
Chardonnay	1				11	90%	13	\$19,163
Pinot Gris/Grigio					11	100%	11	\$14,017
Riesling					10	100%	10	\$15,473
Roussanne					1	100%	1	\$1,050
Sauvignon Blanc	3				20	88%	23	\$34,032
Other white					1	100%	1	\$1,864
White Total	4				54	93%	58	\$85,598
Grand Total	14	\$29,090	\$2,050	0%	149	91%	163	\$284,346

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

Kangaroo Island

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2021
	Pre-2019	2019	2020	2021		
Red winegrapes						
Cabernet Franc	4	0	0	0	4	0%
Cabernet Sauvignon	43	0	0	0	43	0%
Grenache	1	0	0	0	1	0%
Malbec	2	0	0	0	2	0%
Merlot	4	0	0	0	4	0%
Pinot Noir	1	0	0	0	1	0%
Shiraz	44	0	0	0	44	0%
Other Red	4	0	0	0	4	0%
Total red varieties	103	0	0	0	103	0%
Chardonnay	9	0	0	0	9	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	9	0	0	0	9	0%
Semillon	1	0	0	0	1	0%
Other White	4	0	0	0	4	0%
Total white varieties	27	0	0	0	27	0%
Unknown variety	16	0	0	0	16	0%
Total all varieties	146	0	0	0	146	0%

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2022

Regional Summary Report

Southern Fleurieu 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

Southern Fleurieu Wine Region



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Southern Fleurieu

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	107	\$101,231	\$946	-16%			107	\$101,231
Merlot	97						97	\$58,176
Pinot Noir	31						31	\$15,640
Shiraz	287	\$252,045	\$878	-27%			287	\$252,045
Tempranillo	25						25	\$53,930
Red Total	547	\$481,022	\$879	-31%			547	\$481,022
White								
Chardonnay	62	\$44,536	\$723	0%			62	\$44,536
Pinot Gris/Grigio	193	\$231,478	\$1,200	0%			193	\$231,478
Sauvignon Blanc	25						25	\$29,539
White Total	279	\$305,552	\$1,095	12%			279	\$305,552
Grand Total	826	\$786,574	\$952	-22%			826	\$786,574

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

Southern Fleurieu

Price dispersion – purchased grapes

Varieties	Tonnes purchased in each segment				Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	>\$2000	
Red					
Cabernet Sauvignon		91		16	107
Merlot		97			97
Pinot Noir	31				31
Shiraz		206	48	33	287
Tempranillo				25	25
Red Total	31	394	48	74	547
White					
Chardonnay	23	39			62
Pinot Gris/Grigio			193		193
Sauvignon Blanc			25		25
White Total	23	39	218		279
Total purchased	54	433	266	74	826

Southern Fleurieu

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2021
	Pre-2019	2019	2020	2021		
Red varieties						
Cabernet Sauvignon	75	0	0	0	75	0%
Grenache	1	0	0	0	1	0%
Malbec	1	0	0	0	1	0%
Merlot	35	0	0	0	35	0%
Pinot Noir	25	0	0	0	25	0%
Shiraz	124	6	0	0	130	0%
Other Red	3	0	0	0	3	0%
Total red varieties	264	6	0	0	270	0%
White varieties						
Chardonnay	68	0	0	0	68	0%
Pinot Gris	24	1	0	0	25	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	61	0	0	0	61	0%
Savagnin	3	0	0	0	3	0%
Semillon	13	0	0	0	13	0%
Viognier	9	0	0	0	9	0%
Other White	1	1	0	0	2	0%
Total white varieties	182	2	0	0	184	0%
Total all varieties	446	8	0	0	454	0%

Source:
Vinehealth
Australia