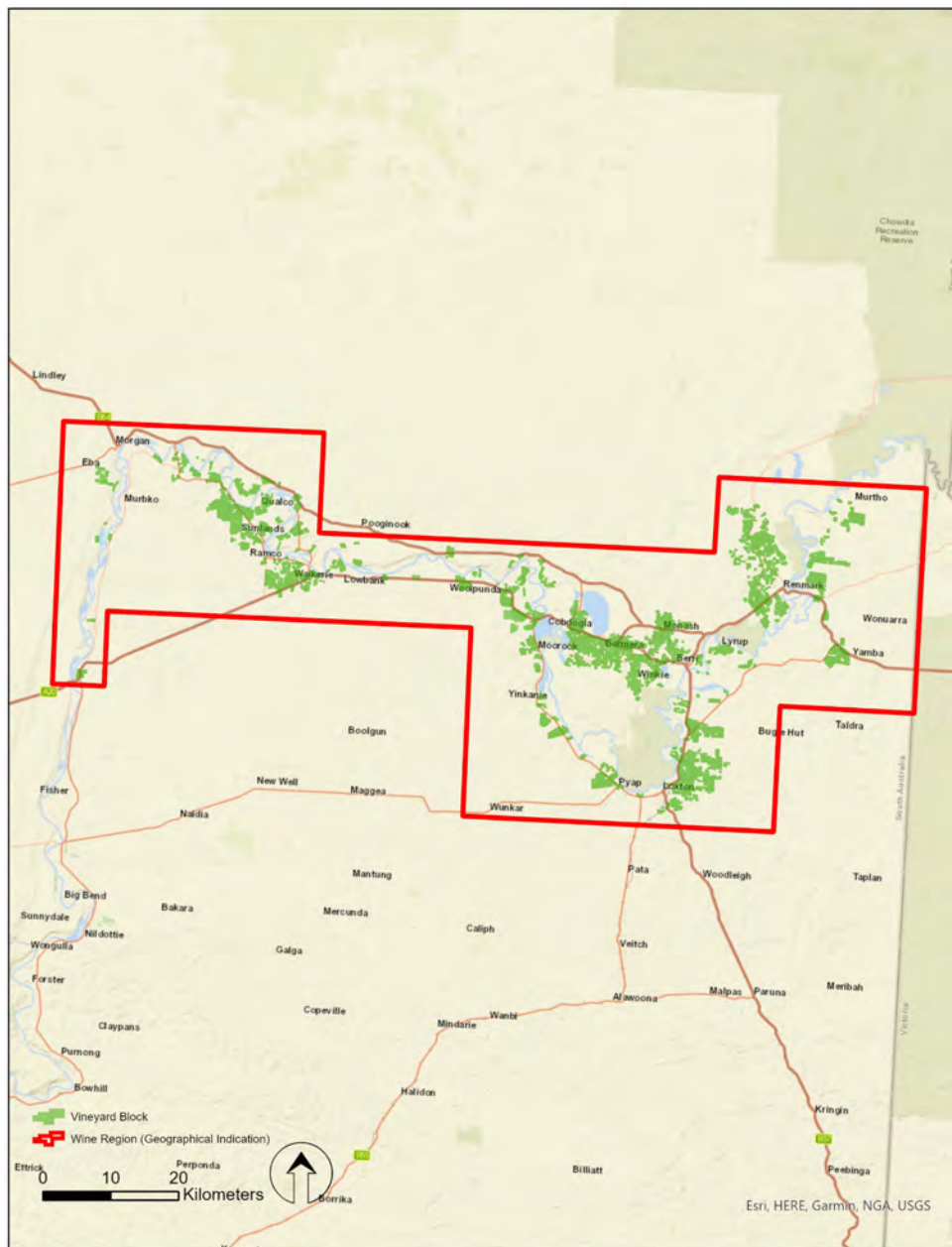


SA Winegrape Crush Survey 2022

Regional Summary Report

Riverland Wine Region

Wine Australia July 2022



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 1st June 2021
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Riverland 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.

Riverland

Vintage overview

VINTAGE REPORT

Overall, the growing conditions for the vintage 2022 season were mild in the Riverland region. The 2022 season was mild in terms of weather, and the season started with some early moderate rainfalls in September. Storms on the 28th of October in some parts of the region, and again in early November brought hail in some areas. While not significant in terms of total regional production it was devastating for the growers affected. Some vineyards had significant areas with posts laid flat during periods of severe wind.

The mild weather with few hot days led to fruit being in good condition when it reached harvest maturity, and most producers reported better fruit and wine quality than the previous 2021 vintage. With few days above 40 degrees centigrade there were no concerns of heat damage to yield or quality that can be a problem in hot seasons. This did create some delays during winery intake, with fruit ripening disrupted by two periods where sugar accumulation stalled. The timing of processing varied across different intake sites, with some reporting a late finish while others finishing at a similar time to last season. Some producers faced concerns with less consistency of fruit ripening than the norm, but the mild conditions resulted in fruit being in good condition even when harvest was delayed.

The milder weather and some rain periods during November led to an increased disease pressure, in particular powdery mildew. Some patches of white varieties, in particular Chardonnay, required mid to late season controls to get on top of this, but at the end of the season the impact at regional level was very minor.

Most producers reported lower intake of red varieties than the previous bumper season, and similar crop levels of white varieties.

*Lyndall Rowe, Executive Officer
Riverland Wine*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from the Riverland was 506,769 tonnes in 2022, down 9 per cent compared with the 2021 record crush of 558,252 tonnes. The crush was the second largest ever recorded, and only the second crush recorded over 500,000 tonnes.

Over the past five years (up to 2021), the average crush for the Riverland has been 482,252 tonnes. The 2022 crush was 5 per cent above the average.

There were 63 respondents to the survey who reported crushing grapes from the Riverland in 2022, compared with 62 in 2021.

The total estimated value of winegrapes from the Riverland in 2022 was just under \$197 million compared with \$273 million in 2021, a decrease of \$76 million (28 per cent). The smaller crush size was compounded by a 19 per cent overall decrease in the average purchase value of grapes, which decreased from \$486 per tonne in 2021 to \$391 per tonne.

The overall decrease was driven by the red varieties. Shiraz, Cabernet Sauvignon and Merlot were all down by 37 per cent. However, Grenache was only down 3 per cent (to \$619 per tonne) and Pinot Noir was up 6 per cent to \$728 per tonne. In the whites, Chardonnay decreased by 4 per cent to \$419 per tonne, while the other major whites all increased in average value. Sauvignon Blanc was up 18 per cent to \$576, Pinot Gris/Grigio was up 3 per cent to \$556 per tonne and Riesling increased 4 per cent to \$357 per tonne.

According to Vinehealth Australia data, the total vineyard area in the Riverland as at 30 April 2022 was 20,553 hectares, compared with 20,492 hectares in 2021 and 20,340 five years ago. There were 99 hectares of new plantings (including top-working and replacements) in the 2021-22 planting season, of which 60 hectares was Shiraz.

Riverland

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	5						5	\$1,690
Cabernet Franc	8				5	38%	13	\$4,182
Cabernet Sauvignon	53,262	\$18,033,923	\$339	-37%	21,023	28%	74,285	\$25,152,070
Durif	920	\$473,463	\$514	-12%	449	33%	1,369	\$704,368
Graciano	3						3	\$1,039
Grenache	4,193	\$2,596,861	\$619	-3%	302	7%	4,495	\$2,783,921
Lagrein	4				18	83%	21	\$6,620
Malbec	166				355	68%	520	\$202,777
Mataro/Mourvedre	1,815	\$897,040	\$494	-6%	191	10%	2,006	\$991,639
Merlot	17,715	\$5,903,800	\$333	-37%	12,322	41%	30,037	\$10,010,185
Montepulciano	164	\$103,780	\$625	-10%	62	27%	226	\$142,516
Muscat à Petits Grains Rouges	233	\$106,226	\$455	-15%			233	\$106,226
Nebbiolo	2						2	\$626
Nero d'Avola	2						2	\$2,428
Petit Verdot	5,589	\$1,933,694	\$346	-30%	6,716	55%	12,305	\$4,257,296
Pinot Meunier	1						1	\$188
Pinot Noir	7,960	\$5,791,133	\$728	6%	1,072	12%	9,032	\$6,571,051
Ruby Cabernet	1,028	\$375,999	\$366	-28%	949	48%	1,978	\$723,059
Sangiovese	136	\$63,396	\$465	-7%	444	77%	581	\$270,223
Shiraz	90,183	\$31,134,859	\$345	-37%	37,989	30%	128,172	\$44,250,034
Tempranillo	794	\$392,751	\$495	-19%	567	42%	1,361	\$673,487
Touriga Nacional	28				87	76%	115	\$40,096
Other red	2,128	\$899,045	\$423	-20%	14,747	87%	16,875	\$6,970,368
Red Total	186,340	\$68,789,950	\$369	-33%	97,297	34%	283,637	\$103,866,088

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

Riverland

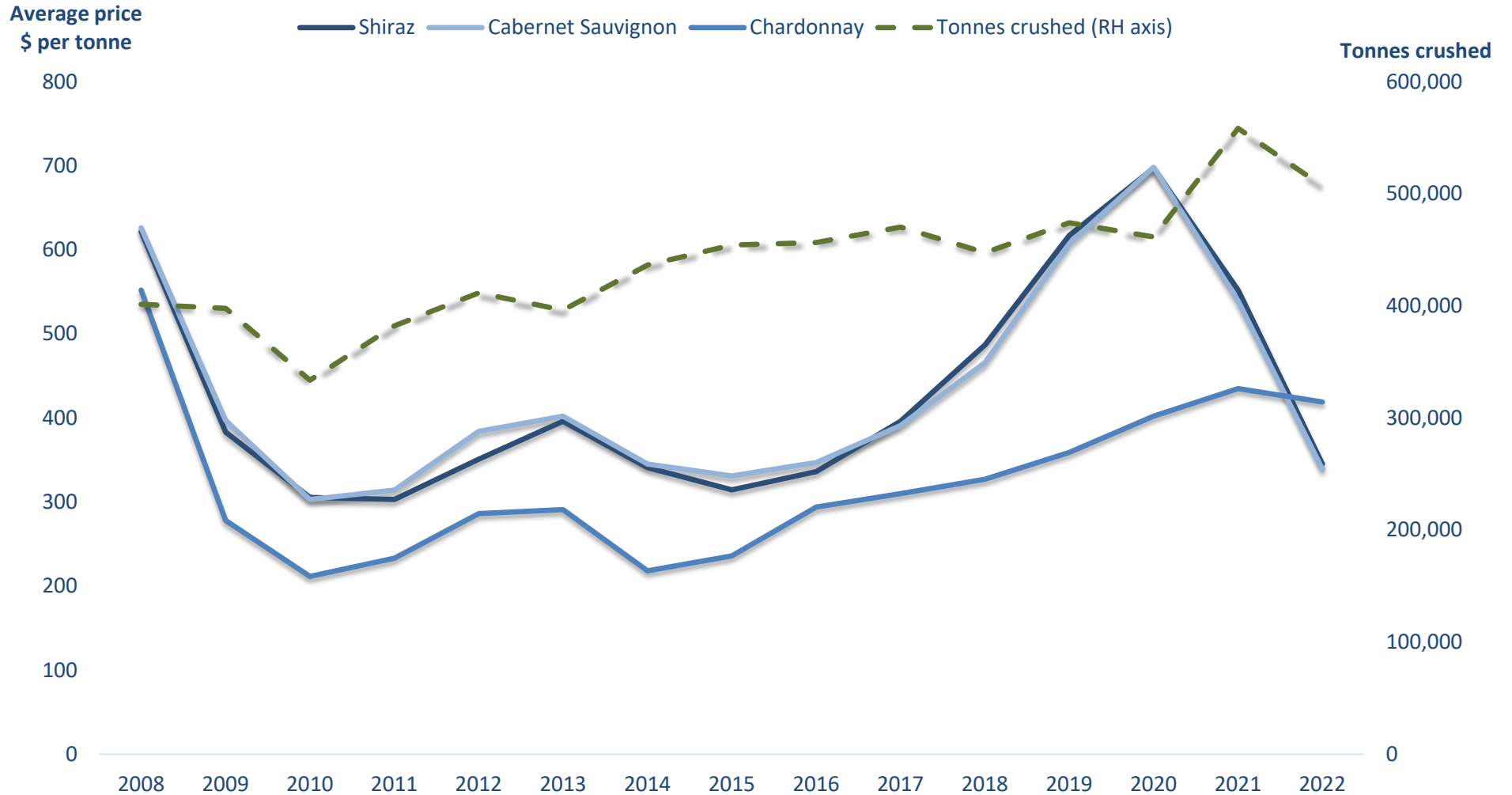
Winegrape intake summary table – whites

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	97,430	\$40,846,014	\$419	-4%	26,769	22%	124,199	\$52,067,390
Chenin blanc	1,313	\$439,052	\$334	-1%			1,313	\$439,052
Colombard	20,728	\$6,742,594	\$325	3%	3,577	15%	24,305	\$7,906,108
Fiano	119						119	\$71,389
Gewürztraminer	849	\$335,544	\$395	1%	1,656	66%	2,506	\$989,842
Grüner Veltliner	4				105	97%	108	\$35,020
Muscat à Petits Grains Blancs	3,190	\$1,066,644	\$334	0%	726	19%	3,917	\$1,309,404
Muscat Gordo Blanco	17,388	\$5,511,578	\$317	2%	3,732	18%	21,120	\$6,694,686
Pinot Gris/Grigio	6,898	\$3,837,413	\$556	3%	2,387	26%	9,284	\$5,165,214
Prosecco	355	\$293,350	\$827	0%			355	\$293,350
Riesling	1,488	\$531,270	\$357	4%	313	17%	1,802	\$643,123
Roussanne	4						4	\$1,376
Sauvignon Blanc	16,438	\$9,467,839	\$576	18%	3,625	18%	20,063	\$11,555,734
Semillon	4,437	\$1,641,774	\$370	5%	3,875	47%	8,312	\$3,075,788
Verdelho	1,022	\$326,098	\$319	-2%	1,204	54%	2,225	\$710,263
Vermentino	392	\$223,050	\$569	-2%	323	45%	716	\$406,822
Viognier	1,354	\$677,370	\$500	12%	690	34%	2,044	\$1,022,475
Other white	525	\$227,576	\$434	13%	216	29%	741	\$398,461
White Total	173,934	\$72,241,062	\$415	2%	49,198	22%	223,132	\$92,785,496
Grand Total	360,273	\$141,031,011	\$391	-19%	146,495	29%	506,769	\$196,651,585

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

Riverland

Historical weighted average price vs tonnes crushed



Riverland

Price dispersion – purchased grapes (reds)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera	5					5
Cabernet Franc	8					8
Cabernet Sauvignon	52,796	251	215			53,262
Durif	810	100	10			920
Graciano	3					3
Grenache	1,297	2,771	106	20		4,193
Lagrein	4					4
Malbec	166					166
Mataro/Mourvedre	1,542	187	85			1,815
Merlot	17,590	98	27			17,715
Montepulciano	111	9	45			164
Muscat à Petits Grains Rouges	233					233
Nebbiolo	2					2
Nero d'Avola				2		2
Petit Verdot	5,548	41				5,589
Pinot Meunier	1					1
Pinot Noir		7,165	795			7,960
Ruby Cabernet	993	35				1,028
Sangiovese	117		19			136
Shiraz	88,712	842	629			90,183
Tempranillo	526	71	197			794
Touriga Nacional	28					28
Other red	1,833	294				2,128
Red Total	172,326	11,863	2,131	20		186,340

Riverland

Price dispersion – purchased grapes (whites)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
White						
Chardonnay	96,776	35	620			97,430
Chenin blanc	1,265	48				1,313
Colombard	20,645	83				20,728
Fiano	119					119
Gewürztraminer	849					849
Grüner Veltliner	4					4
Muscat à Petits Grains Blancs	3,190					3,190
Muscat Gordo Blanco	17,388					17,388
Pinot Gris/Grigio	5,608	1,290				6,898
Prosecco		355				355
Riesling	1,488					1,488
Roussanne	4					4
Sauvignon Blanc	13,203	3,198			37	16,438
Semillon	4,360	77				4,437
Verdelho	1,022					1,022
Vermentino	199	111	82			392
Viognier	1,144		209			1,354
Other white	490		24	11		525
White Total	167,755	5,196	935	11	37	173,934
Total purchased	340,081	17,059	3,066	30	37	360,273

Riverland

Current plantings by variety and year planted – reds

Variety	Area (hectares)				Total area (Ha)	% planted in 2021
	Pre-2019	2019	2020	2021		
Red winegrapes						
Barbera	2	0	0	0	2	0%
Cabernet Franc	2	0	0	0	2	0%
Cabernet Sauvignon	3,355	26	15	12	3,408	0%
Durif (Petite Sirah)	35	0	13	1	49	2%
Grenache	280	1	0	1	282	0%
Malbec	27	0	0	0	27	0%
Mataro (Mourvedre)	212	0	0	0	212	0%
Merlot	1,199	16	3	3	1,221	0%
Montepulciano	7	0	0	0	7	0%
Muscat A Petit Grains Rouge	2	0	0	0	2	0%
Petit Verdot	496	0	0	0	496	0%
Pinot Noir	291	1	7	7	306	2%
Ruby Cabernet	114	0	1	0	115	0%
Sangiovese	17	4	0	0	21	0%
Saperavi	2	0	0	0	2	0%
Shiraz	5,553	122	55	60	5,790	1%
Tempranillo	52	0	0	0	52	0%
Touriga	14	0	0	0	14	0%
Other Red	94	5	2	0	101	0%
Total red varieties	11,754	175	96	84	12,109	1%

Source:
Vinehealth
Australia

Riverland

Current plantings by variety and year planted – whites and other

Variety	Area (hectares)				Total area (Ha)	% planted in 2021
	Pre-2019	2019	2020	2021		
White winegrapes						
Chardonnay	4,228	5	2	7	4,242	0%
Chenin Blanc	71	0	0	0	71	0%
Colombard	694	0	0	0	694	0%
Doradillo	30	0	0	0	30	0%
Fiano	13	0	0	0	13	0%
Muscadelle (Tokay)	5	0	0	0	5	0%
Muscat A Petit Grains Blanc (White Frontignac)	98	0	0	0	98	0%
Muscat Gordo Blanco	827	0	0	0	827	0%
Palomino	6	0	0	0	6	0%
Pedro Ximenez	4	0	0	0	4	0%
Pinot Gris	252	9	0	0	261	0%
Riesling	88	0	0	0	88	0%
Sauvignon Blanc	542	16	4	5	567	1%
Savagnin	8	0	0	0	8	0%
Semillon	299	0	0	0	299	0%
Sultana	102	0	0	0	102	0%
Traminer (Gewürztraminer)	92	0	0	0	92	0%
Trebbiano	12	0	0	0	12	0%
Verdelho	83	0	0	0	83	0%
Vermentino	16	0	0	0	16	0%
Viognier	103	0	0	0	103	0%
Other White	40	0	0	3	43	7%
Total white varieties	7,613	30	6	15	7,664	0%
Unknown variety	483	64	56	0	603	0%
Rootstock Block	26	0	0	0	26	0%
Table grapes - red	16	0	0	0	16	0%
Table grapes - white	49	0	0	0	49	0%
Multi-purpose red	60	0	0	0	60	0%
Multi-purpose white	26	0	0	0	26	0%
Total all varieties	20,027	269	158	99	20,553	0%

Source:
Vinehealth
Australia