

SA Winegrape Crush Survey 2023

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2023

DATUM: GDA2020
 PROJECTION: SA Lambert
 DATE: 15th February 2023
 SOFTWARE: ESRI ArcGIS v10.7.1
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

McLaren Vale 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.

McLaren Vale

Vintage overview

VINTAGE REPORT

The McLaren Vale wine region experienced good winter rains filling the soil profile in readiness for spring. Continued wet and cold conditions throughout spring delayed budburst and resulted in slower shoot growth. Spring rainfall was higher than the McLaren Vale winter average. Multiple rain events during spring resulted in increased disease pressure and inflorescence loss, some varieties being more affected than others.

Flowering occurred in late November and weather was mostly cool, wet, windy and cloudy adversely impacting on fruit set in across the region. With the advent of summer, rainfall stopped abruptly and conditions for December, January and February were dry and mild with only a few days above 40°C.

The combination of late flowering and cool summer conditions resulted in a late harvest period. Once again cool wet autumn conditions combined to further slow ripening and prolong vintage.

In summary, vintage 2023 was cool and wet, harvest was later than usual, and yields were well below average. Whilst this has been a challenging season for grapegrowers and winemakers alike it has allowed their skills to shine, and we expect to see elegant wines that express terroir.

Jodie Armstrong, for McLaren Vale Grape, Wine and Tourism Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from McLaren Vale was 26,467 tonnes in 2023, 24 per cent below the 2022 reported crush of 34,990 tonnes and 22 per cent below the five-year average (2018–2022) of 33,913 tonnes. It was the lowest crush recorded for the region since the first SA Winegrape Crush Survey in 1993.

There were 86 respondents to the survey who reported crushing grapes from McLaren Vale in 2023, compared with a record 95 in 2022.

The total estimated value of winegrapes from McLaren Vale in 2023 was just under \$45.5 million compared with just under \$64 million in 2022 – a decrease of 29 per cent. The overall average value declined by 6 per cent from \$1809 per tonne to \$1693 per tonne.

Grenache had the highest average value at \$2432 per tonne (up 6 per cent). Shiraz declined by 9 per cent to \$1734 per tonne, while Cabernet Sauvignon was down 12 per cent to \$1554 per tonne. These two varieties have both seen decreases of more than \$400 per tonne since 2020.

The price dispersion data shows a downward shift in prices compared with last year, with 31 per cent of red grapes purchased at \$2000 per tonne and above, compared with 41 per cent last year.

According to Vinehealth Australia data, the total vineyard area in McLaren Vale as at 30 April 2023 is 7375 hectares, nearly identical with the 7377 hectares in 2022. The total area is around 51 hectares more than it was 5 years ago.

There were 24 hectares of new plantings (including top-working and replacements) in the 2022-23 planting season, including 7 hectares of Grenache, 4 hectares of Sangiovese and 4 hectares of Fiano.

McLaren Vale

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	7	\$16,286	\$2,399	0%			7	\$16,286
Cabernet Franc	34	\$63,027	\$1,872	3%	10	23%	44	\$81,856
Cabernet Sauvignon	3,070	\$4,766,689	\$1,554	-12%	2,208	42%	5,278	\$8,197,995
Durif	4				5	54%	9	\$21,048
Graciano	30				18	37%	48	\$108,077
Grenache	789	\$1,917,666	\$2,432	6%	1,031	57%	1,819	\$4,424,089
Lagrein	3				1	23%	4	\$7,780
Malbec	9	\$17,304	\$1,914	-11%	27	75%	36	\$69,172
Mataro/Mourvedre	323	\$617,548	\$1,914	5%	277	46%	600	\$1,148,478
Merlot	371	\$401,846	\$1,084	-14%	211	36%	582	\$630,778
Montepulciano	25	\$52,055	\$2,049	-1%	5	16%	30	\$61,746
Muscat à Petits Grains Rouges					10	100%	10	\$15,137
Nebbiolo					0	100%	0	\$1,266
Nero d'Avola	62	\$134,750	\$2,168	2%	19	23%	81	\$174,986
Petit Verdot	4				76	94%	80	\$130,251
Pinot Noir	253	\$360,338	\$1,425	6%	19	7%	272	\$387,417
Sangiovese	89	\$171,075	\$1,930	1%	86	49%	174	\$336,820
Shiraz	9,388	\$16,282,298	\$1,734	-9%	5,813	38%	15,201	\$26,364,378
Tempranillo	88	\$174,278	\$1,989	-0%	114	56%	201	\$400,422
Touriga Nacional	30	\$64,311	\$2,134	-5%	55	65%	85	\$181,526
Other red	56	\$104,256	\$1,846	-7%	144	72%	200	\$363,075
Red Total	14,634	\$25,234,116	\$1,725	-8%	10,128	41%	24,762	\$43,122,583

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

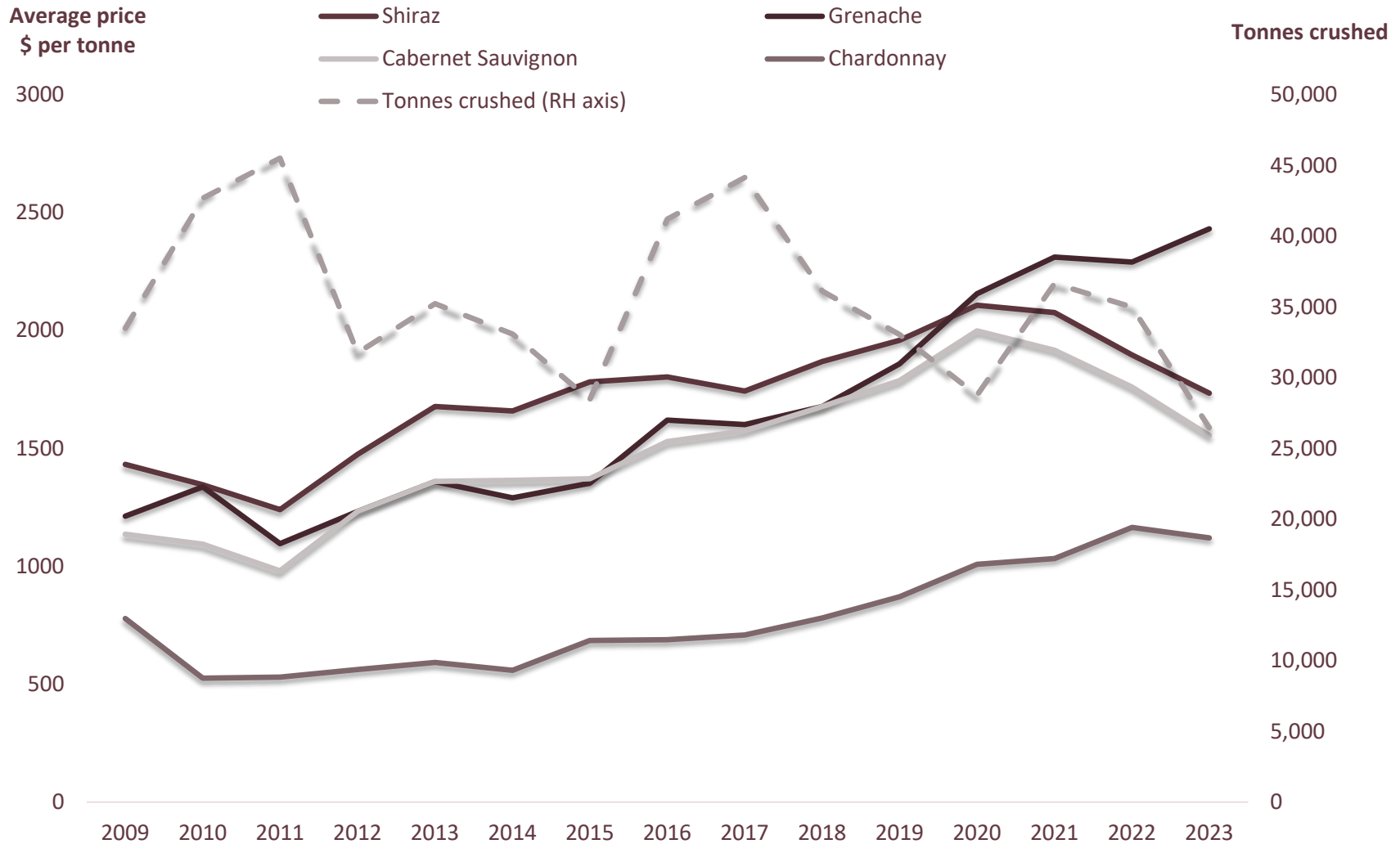
Winegrape intake summary table – white winegrapes

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	704	\$788,422	\$1,120	-4%	96	12%	800	\$896,472
Chenin blanc	17	\$37,240	\$2,239	52%	7	30%	24	\$53,520
Fiano	51	\$92,573	\$1,819	-7%	95	65%	146	\$265,734
Marsanne	28				23	45%	52	\$82,768
Muscat à Petits Grains Blancs	12	\$16,831	\$1,380	13%	5	31%	18	\$24,240
Muscat Gordo Blanco					5	100%	5	\$6,022
Pinot Gris/Grigio					97	100%	97	\$137,919
Riesling	101	\$137,663	\$1,357	-6%	5	5%	107	\$144,694
Roussanne					25	100%	25	\$51,456
Sauvignon Blanc	35	\$51,502	\$1,461	-9%	65	65%	100	\$145,938
Semillon	0				46	99%	46	\$69,585
Verdelho	58	\$67,162	\$1,164	3%	7	11%	65	\$75,519
Vermentino	26	\$49,509	\$1,940	-5%	28	53%	54	\$104,314
Viognier	42	\$65,073	\$1,545	-2%	79	65%	122	\$187,681
Other white	18	\$38,552	\$2,150	8%	28	61%	46	\$81,038
White Total	1,092	\$1,390,448	\$1,273	0%	613	36%	1,705	\$2,326,901
Grand Total	15,726	\$26,624,564	\$1,693	-6%	10,741	41%	26,467	\$45,449,484

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 (red)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera					7	7
Cabernet Franc			18	3	14	34
Cabernet Sauvignon	28	44	1,415	1,050	533	3,070
Durif					4	4
Graciano					30	30
Grenache			22	125	641	789
Lagrein					3	3
Malbec				4	5	9
Mataro/Mourvedre		3	41	180	99	323
Merlot		151	177	40	3	371
Montepulciano				6	19	25
Nero d'Avola					62	62
Petit Verdot				4		4
Pinot Noir			154	89	9	253
Sangiovese				57	32	89
Shiraz	175	229	3,292	2,710	2,982	9,388
Tempranillo				40	48	88
Touriga Nacional				8	22	30
Other red			10	8	38	56
Red Total	202	427	5,129	4,324	4,551	14,633

McLaren Vale

Price dispersion – purchased grapes (white)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
White						
Chardonnay		16	602	52	33	704
Chenin blanc			2		14	17
Fiano				25	26	51
Marsanne				28		28
Muscat à Petits Grains Blancs			10	2		12
Riesling	9		45	47		101
Sauvignon Blanc			30		6	35
Semillon				0		0
Verdelho			46	11		58
Vermentino				10	15	26
Viognier		7		35		42
Other white				2	16	18
White Total	9	23	736	213	111	1,092
Total purchased	212	450	5,865	4,537	4,662	15,726

McLaren Vale

Current plantings by variety and year planted - reds

Variety	Area (hectares)				Total area (Ha)	% planted in 2022
	Pre-2020	2020	2021	2022		
Red winegrapes						
Aglianico	5	0	1	1	7	14%
Barbera	12	0	0	0	12	0%
Cabernet Franc	22	0	0	0	22	0%
Cabernet Sauvignon	1,298	27	0	0	1,325	0%
Carignan	6	0	0	0	6	0%
Cinsault	3	0	0	0	3	0%
Durif	5	0	0	0	5	0%
Graciano	5	1	0	0	6	0%
Grenache	457	11	11	7	486	1%
Malbec	13	0	0	0	13	0%
Mataro (Mourvedre)	92	0	1	1	94	1%
Mencia	6	1	0	0	7	0%
Merlot	182	0	0	0	182	0%
Montepulciano	19	0	0	1	20	5%
Nebbiolo	2	0	0	0	2	0%
Nero D'Avola	25	0	2	2	29	7%
Petit Verdot	44	0	0	0	44	0%
Pinot Noir	46	0	0	0	46	0%
Sagrantino	7	0	0	0	7	0%
Sangiovese	41	0	0	4	45	9%
Saperavi	3	0	0	0	3	0%
Shiraz	4,113	67	12	1	4,193	0%
Tempranillo	65	4	3	1	73	1%
Touriga	21	0	0	0	21	0%
Zinfandel	4	0	0	0	4	0%
Other Red	28	0	0	0	28	0%
Total red varieties	6,524	111	30	18	6,683	0%

Source:
Vinehealth
Australia

McLaren Vale

Current plantings by variety and year planted - whites

Variety	Area (hectares)				Total area (Ha)	% planted in 2022
	Pre-2020	2020	2021	2022		
White winegrapes						
Chardonnay	264	0	0	0	264	0%
Chenin Blanc	14	0	0	0	14	0%
Fiano	29	4	8	4	45	9%
Grenache Blanc	2	0	0	0	2	0%
Muscat A Petit Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris	23	0	3	0	26	0%
Riesling	27	0	0	0	27	0%
Roussanne	12	0	0	0	12	0%
Sauvignon Blanc	39	0	0	0	39	0%
Semillon	16	0	0	0	16	0%
Verdelho	15	0	0	0	15	0%
Vermentino	5	1	0	0	6	0%
Viognier	49	0	0	0	49	0%
Other White	26	0	1	2	29	7%
Total white varieties	531	5	12	6	554	1%
Rootstock Block	4	0	0	0	4	0%
Unknown variety	134	0	0	0	134	0%
Total all varieties	7,193	116	42	24	7,375	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2023

Regional Summary Report

Fleurieu zone - other

Wine Australia July 2023

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**



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.

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								
Malbec	12						12	\$12,460
Shiraz	144	\$122,304	\$849	-2%			144	\$122,304
Red Total	156	\$134,764	\$861	-6%			156	\$134,764
White								
Chardonnay	242	\$154,836	\$641	-2%			242	\$154,836
Pinot Gris/Grigio	127						127	\$122,228
Prosecco	15						15	\$13,314
Riesling	33						33	\$28,271
Sauvignon Blanc	123						123	\$135,641
White Total	540	\$454,290	\$841	5%			540	\$454,290
Grand Total	696	\$589,054	\$846	-1%			696	\$589,054

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

Tonnes purchased in each segment					
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	>\$2000	Total purchased
Red					
Malbec			12		12
Shiraz	97		40	8	144
Red Total	97		52	8	156
White					
Chardonnay		242			242
Pinot Gris/Grigio			127		127
Prosecco		11	4		15
Riesling		33			33
Sauvignon Blanc			123		123
White Total		286	255		540
Total purchased	97	286	307	8	696

Fleurieu zone - other

Current plantings by variety and year planted

Variety	Area (hectares)				Total area % planted in	
	Pre-2020	2020	2021	2022	(Ha)	2022
Red winegrapes						
Cabernet Sauvignon	20	0	0	0	20	0%
Grenache	1	0	0	0	1	0%
Shiraz	67	0	0	0	67	0%
Other Red	3	0	0	0	3	0%
Total red varieties	91	0	0	0	91	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	4	0	0	0	4	0%
Total white varieties	64	0	0	0	64	0%
Unknown variety	1	0	0	0	1	0%
Total all varieties	156	0	0	0	156	0%

Source:
Vinehealth
Australia

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					27	100%	27	\$38,561
Malbec					0	100%	0	\$618
Merlot					9	100%	9	\$8,803
Montepulciano					4	100%	4	\$8,982
Pinot Noir					5	100%	5	\$10,849
Shiraz					39	100%	39	\$61,658
Red Total					85	100%	85	\$129,471
White								
Chardonnay					8	100%	8	\$11,264
Pinot Gris/Grigio					18	100%	18	\$24,973
Roussanne					1	100%	1	\$2,178
Sauvignon Blanc					10	100%	10	\$14,773
Other white					3	100%	3	\$4,310
White Total					40	100%	40	\$57,498
Grand Total					124	100%	124	\$186,969

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 2022
	Pre-2020	2020	2021	2022		
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	4	0	0	0	4	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	105	0	0	0	105	0%
White winegrapes						
Chardonnay	9	0	0	0	9	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	2	0	0	0	2	0%
Sauvignon Blanc	9	0	0	0	9	0%
Semillon	1	0	0	0	1	0%
Other White	3	0	0	1	4	25%
Total white varieties	25	0	0	1	26	4%
Unknown variety	15	0	0	0	15	0%
Total all varieties	145	0	0	1	146	1%

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2023

Regional Summary Report

Southern Fleurieu Wine Region

Wine Australia July 2023



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



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.

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	65	\$74,206	\$1,138	20%			65	\$74,206
Pinot Noir	50						50	\$126,368
Shiraz	122	\$103,918	\$855	-3%			122	\$103,918
Tempranillo	2						2	\$5,616
Red Total	238	\$310,108	\$1,301	48%			238	\$310,108
White								
Chardonnay	25						25	\$14,421
Pinot Gris/Grigio	62						62	\$74,473
Sauvignon Blanc	48	\$61,918	\$1,282	0%			48	\$61,918
White Total	135	\$150,812	\$1,115	2%			135	\$150,812
Grand Total	374	\$460,920	\$1,234	30%			374	\$460,920

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

Tonnes purchased in each segment						
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	Total purchased
Red						
Cabernet Sauvignon	20	27			18	65
Pinot Noir				30	20	50
Shiraz	64	37			20	122
Tempranillo					2	2
Red Total	85	64		30	60	238
White						
Chardonnay	17	9				25
Pinot Gris/Grigio			62			62
Sauvignon Blanc			48			48
White Total	17	9	110			135
Total purchased	101	73	110	30	60	374

Southern Fleurieu

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2022
	Pre-2020	2020	2021	2022		
Red winegrapes						
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	27	0	0	0	27	0%
Shiraz	130	0	0	0	130	1%
Other Red	2	0	0	0	2	0%
Total red varieties	271	0	0	0	271	0%
White winegrapes						
Chardonnay	67	0	0	0	67	0%
Pinot Gris	25	0	8	0	25	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	3	0	0	0	3	0%
Total white varieties	181	0	0	0	181	0%
Total all varieties	452	0	0	0	452	0%

Source:
Vinehealth
Australia