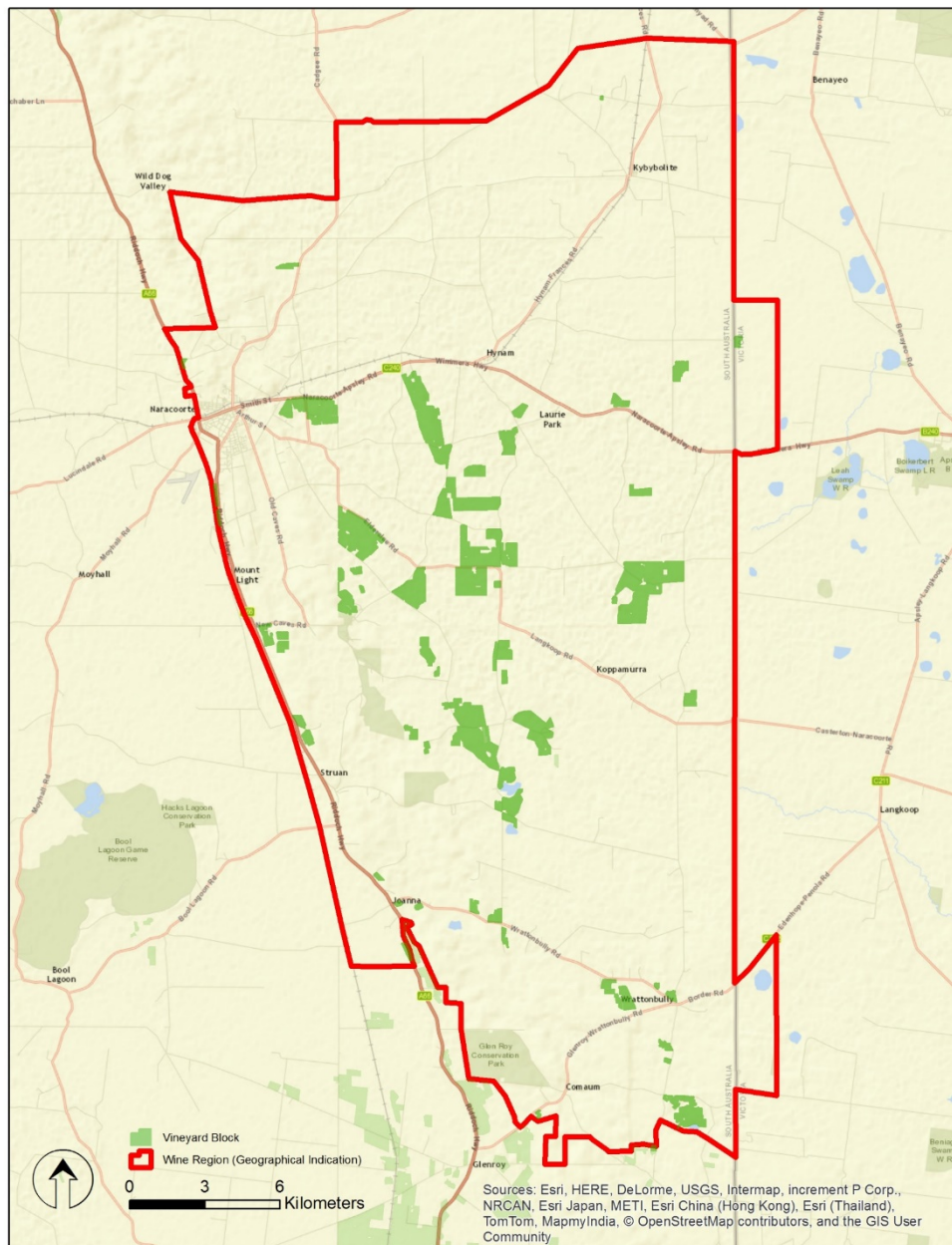


SA Winegrape Crush Survey 2019

Regional Summary Report

Wrattonbully Wine Region

Wine Australia July 2019



**Wrattonbully
Wine Region**



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Wratttonbully

Vintage overview

VINTAGE REPORT

2019 got off to a great start with exceptional winter rainfall leading to full soil moisture profiles and leaching of the soil, creeks running, and plenty of aquifer recharge. Budburst occurred on par with long term averages, and with ample soil moisture aiding in very solid early shoot growth. A mild spring, combined with good moisture levels, allowed for very good canopy growth and development right through to flowering.

With the milder conditions of spring, flowering was about in line with long term average (early December). There was a significant rain event during the flowering period which was beneficial to continuing vine canopy development. This did upset the flowering of Cabernet Sauvignon leading to a lower percentage of berry set than normal. The rain event also increased the disease pressure during this critical period in the vines' development, but with ample warning and the majority of growers in the district using preventive spray programs, very little disease was detected.

Mid-December through to the commencement of harvest in early March was extremely dry. This, combined with warm to hot conditions and no significant heatwaves, made for near perfect ripening conditions going into harvest. The whites' harvest commenced in early March and was completed by Mid-March, with yields being average to slightly above average. Harvesting of the red varieties commenced in the second week of April and was completed before ANZAC day. The majority of the district's red varieties were harvested in a frantic 2 to 3 week window.

The mild days and cool night temperatures in late February and early March aided in the final ripen of the whites, while the reds benefitted from the longer hang time allowed by the milder conditions. Cabernet Sauvignon again was the stand-out with the cooler, longer ripening aiding in the wines showing very varietal characters, high colour and strong but balanced tannins.

Tim Fletcher, President, Wratttonbully Wine Region

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Wratttonbully in 2019 was 24,573 tonnes, 87 per cent higher than the 2018 crush of 13,160 tonnes and the second highest since the record crop of 28,451 tonnes in 2004.

There were 24 respondents to the survey who reported crushing grapes from Wratttonbully in 2019, compared with 20 in 2018.

The five-year average crush for Wratttonbully from 2014-2018 is 19,709 tonnes. The 2017 crush was the highest in the five year period while the smallest was the 2018 crush. The 2019 crush was 25 per cent above the five-year average.

The total value of grapes almost doubled from \$15.6 million in 2018 to \$30.2 million in 2019, with the higher tonnages enhanced by further increases in the average purchase value across all major varieties. Cabernet Sauvignon increased by 6 per cent to \$1465 per tonne, Shiraz increased by 10 per cent to \$1408 per tonne and Chardonnay increased by 10 per cent to \$792 per tonne.

The price dispersion data shows that there was an upward shift in prices, with 23 per cent of red tonnages purchased at \$1500 per tonne or above, whereas in 2018 there was 15 per cent purchased in this range. For the whites, there was also an upward shift, with 100 per cent purchased between \$600 and \$1500 per tonne compared with 81 per cent in this range and 9 per cent below \$600 per tonne in 2018.

There were just 4 hectares of new plantings in Wratttonbully in the 2018 planting season, less than the two previous years. All were minor varieties.

The total planted area in Wratttonbully as at 30 April 2019 was 2,678 hectares, almost identical to 2018 and only 9 hectares less than in 2013.

Wrattonbully

Winegrape intake summary table

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Cabernet Franc										3	100%	3	\$4,700
Cabernet Sauvignon	2,821		27	2,198	481	116	\$4,132,754	\$1,465	6%	3,316	54%	6,137	\$8,990,121
Malbec	57			47	10		\$64,946	\$1,136		29	34%	87	\$98,345
Merlot	1,262			1,010	253		\$1,406,934	\$1,114	-5%	2,768	69%	4,030	\$4,491,620
Petit Verdot	6			6						37	86%	43	\$55,874
Pinot Noir	252			252			\$261,828	\$1,037		446	64%	699	\$724,414
Sangiovese										61	100%	61	\$79,579
Shiraz	3,661		106	2,607	608	340	\$5,155,666	\$1,408	10%	4,144	53%	7,806	\$10,991,510
Tempranillo	41			6	35					6	12%	46	\$71,430
Red Total	8,101		133	6,125	1,387	457	\$11,092,616	\$1,369	7%	10,810	57%	18,911	\$25,507,594
White													
Chardonnay	1,113			1,113			\$881,163	\$792	10%	1,256	53%	2,369	\$1,875,914
Gewurztraminer	7			7							0%	7	\$4,988
Pinot Gris/Grigio	128			128			\$115,091	\$902	-11%	1,964	94%	2,091	\$1,887,072
Prosecco	128			128							0%	128	\$85,116
Riesling										127	100%	127	\$154,422
Sauvignon Blanc	314			314						459	59%	773	\$516,055
Semillon										80	100%	80	\$76,037
Viognier										87	100%	87	\$113,691
White Total	1,689			1,689			\$1,295,947	\$767	1%	3,973	70%	5,662	\$4,713,294
Grand Total	9,790		133	7,814	1,387	457	\$12,388,564	\$1,265	7%	14,783	60%	24,573	\$30,220,888

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

Wrattenbully

Current plantings by variety and year planted

Variety	Pre-2016	2016	2017	2018	Total area	% planted in 2018
Red winegrapes						
Cabernet Sauvignon	1213	0	6	0	1220	0%
Malbec	6	2	0	2	9	16%
Merlot	278	2	0	0	280	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	695	4	8	0	707	0%
Tempranillo	9	0	0	0	9	0%
Other Red	13	0	0	0	13	0%
TOTAL RED WINEGRAPES	2277	8	14	2	2301	0%
White winegrapes						
Chardonnay	188	0	0	0	188	0%
Pinot Gris/Grigio	97	2	0	0	99	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	61	0	0	0	61	0%
Semillon	3	0	0	0	3	0%
Other White	11	0	0	2	13	15%
TOTAL WHITE WINEGRAPES	367	2	0	2	371	1%
Unknown variety	6	0	0	0	6	0%
TOTAL ALL VARIETIES	2650	10	14	4	2678	0%

Source: Vinehealth Australia

Explanations and definitions

AUSTRALIAN NATIONAL VINTAGE SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association, Wine Grape Growers South Australia and Primary Industries and Regions SA.

Maps and planting data tables are provided by Vinehealth Australia (see notes on planting data tables).

The survey publication is available on Wine Australia's website wineaustralia.com, the Vinehealth Australia website vinehealth.com.au and via links from the Wine Grape Council SA website wgcsa.com.au and the South Australian Wine Industry Association website winesa.com.au

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Note: data published in this report supercedes that in earlier reports. Minor variations in reported figures can occur due to data revisions.

Any questions about the report should be directed to:

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Explanations and definitions - continued

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from Wine Australia.

Total crush

The total crushed is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 88 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2019).

The calculated average purchase value per tonne is the average amount paid per tonne of fruit across all wineries.

Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements.

Average and total purchase values are not reported where there are fewer than three purchasers of a variety in a particular region. However the values are included in the calculation of totals for each region.

Important note on average purchase value

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts.

Price dispersion data (shaded columns in Intake Summary tables)

All purchases for each variety are grouped into price segments according to the price paid for that batch of fruit. The sum of tonnes in all the price segments may not match the total tonnes purchased where there are tonnes reported without an associated price.

Estimated total value of all grapes

The estimated total value of all grapes is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value for the same variety across similar regions, or across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

Explanations and definitions - continued

PLANTING DATA

Source of planting data tables

Planting data is not collected by the Australian National Vintage Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia.

Vinehealth Australia is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of vineyard owners in the state. Vineyard owners with plantings of 0.5 hectares or more are required to register with Vinehealth Australia, and provide details of any changes made to these vineyard plantings within three months of any such change. This information is kept strictly confidential and provided for this survey in a deidentified and aggregated manner.

Explanatory notes for planting data tables

Regions are defined according to the Register of Australian Geographical Indications.

To protect confidentiality, the following rules are applied to reporting varieties:

- where there are fewer than 10 registered owners with plantings of a particular variety across the state, that variety is not separately identified in either the state or the regional reports but is grouped with “other red/white”, AND
- where there are fewer than three registered owners with a particular grape variety in a given region, that variety is not separately identified in the regional report but is grouped with “other red/white” unless it is a white variety listed in the top six, or red variety in the top five by planted area for the state for the current year.

- Planting data tables are current as at 30 April 2019 and include all plantings from the 2018-19 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.
- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.

For more information on the planting data in this report or about registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.