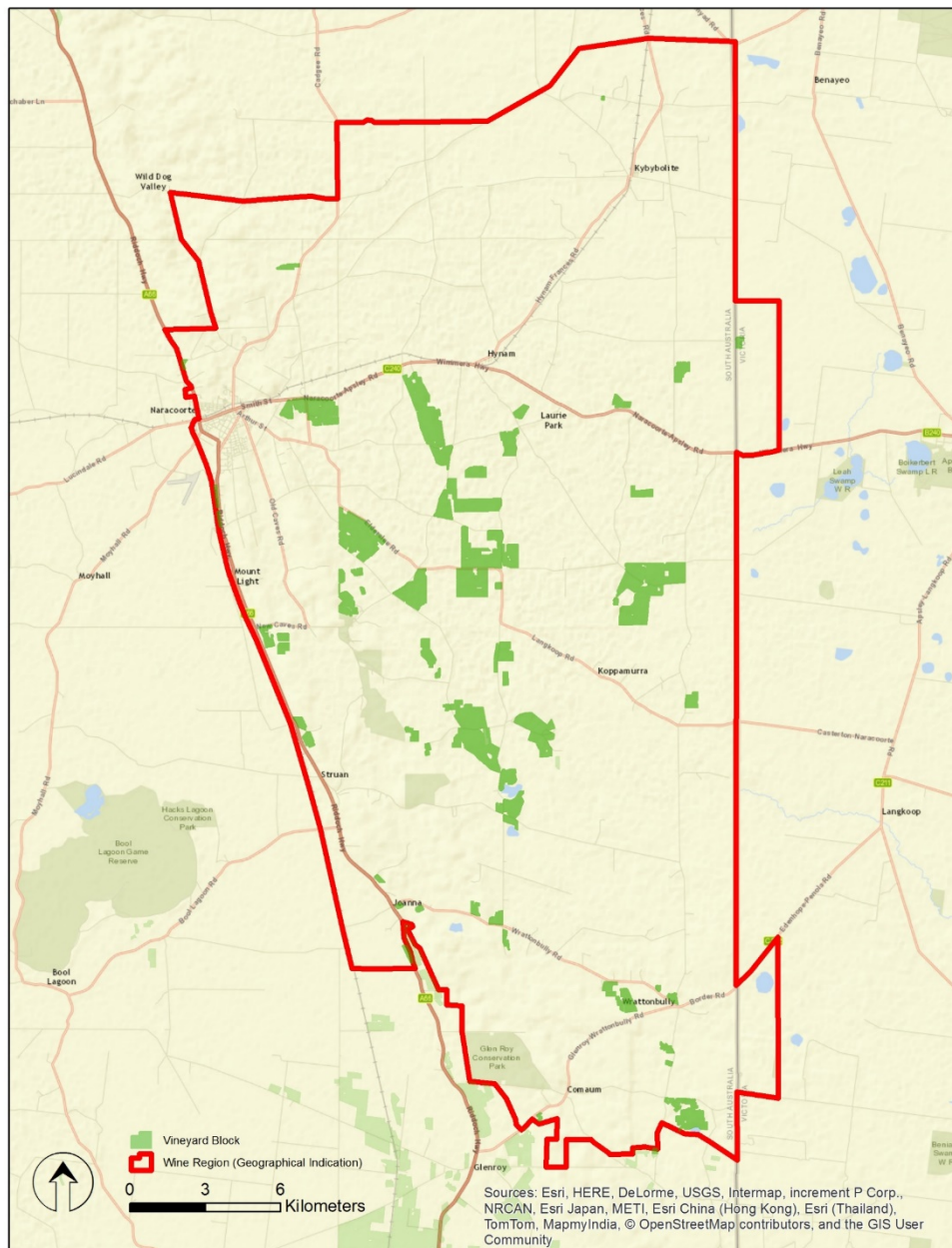


SA Winegrape Crush Survey 2020

Regional Summary Report

Wrattonbully Wine Region

Wine Australia July 2020



**Wrattonbully
Wine Region**



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Wrattonbully

Vintage overview

VINTAGE REPORT

The 2020 vintage will be remembered as a challenging season. It was dominated by fluctuating weather conditions between cool windy and extreme heat spikes, which has led to one of the lowest crops out of the region in recent times.

Coming out of winter was looking great with reasonable winter rainfall and near full soil moisture profiles. However, rainfall came to an abrupt halt during spring and the region moved to a pattern of mild to cool days with clear nights. This led to a high number of nights of frost and significant cold chilling of emerging buds, with the early emerging varieties Shiraz and Chardonnay being the most affected.

Mild and dry conditions continued throughout spring, allowing vine growth to progress at a steady pace with moderate vigour leading to great canopy balance. The mild conditions put the vine growth stages slightly behind average, with the majority of flowering occurring from late November to early December. Unfortunately, weather conditions deteriorated during this part of the season, with a return to cold and very windy conditions. This delayed and caused a long and drawn out flowering period and resulted in a very poor set in most varieties with Chardonnay and Cabernet Sauvignon being the most affected.

A week of extreme heat at the end of December put the vines, growers and their irrigations system under extreme pressure, but mild conditions returned in February and March which allowed for good even ripening of the fruit, with flavours, tannins and baumes developing well especially in Cabernet Sauvignon.

Harvesting of whites commenced in late February, a few weeks later than the past two seasons, but more in line with the long term average. Favourable weather conditions saw the whites develop strong varietal characters, and high crisp natural acidity. The cooler ripening conditions pushed the harvest of red varieties out and the bulk of the red harvest didn't start until April, with the majority complete by mid-April in ideal weather conditions.

Despite the tough season, the hard work and effort put in by the growers in the district has again paid dividends with very strong and varietal red wines being produced again this season - Cabernet Sauvignon being the standout.

Tim Fletcher – Chairperson, Wrattonbully Wine Region Association.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Wrattonbully was 12,372 tonnes in 2020, down by 50 per cent compared with the 2019 reported crush of 24,601 tonnes. Over the past five years (up to 2019), the average crush for Wrattonbully has been 21,068 tonnes, making this year's crush 41 per cent below the five-year average. It was the lowest crush reported since 2007.

There were 24 respondents to the survey who reported crushing grapes from Wrattonbully in 2020, compared with 25 in 2019.

The total estimated value of winegrapes from Wrattonbully in 2020 was \$17.1 million compared with \$30.2 million in 2019. The decrease in production was partly offset by an overall increase in the average purchase value of grapes, which increased by 9 per cent from \$1265 per tonne in 2019 to \$1379 per tonne.

There were increases in average prices for the three largest varieties: Cabernet Sauvignon up by 6 per cent to \$1550 per tonne, Shiraz up 9 per cent to \$1539 per tonne and Pinot Gris/Grigio up by 41 per cent to \$1269 per tonne.

The price dispersion data shows that there was an upward shift in prices, with 35 per cent of red tonnages purchased at \$1500 per tonne or above, compared with 23 per cent in 2019.

According to Vinehealth Australia data, the total vineyard area in Wrattonbully as at 30 April 2020 is 2732 hectares, compared with 2678 hectares in 2019 and around 60 hectares more than it was five years ago.

There were 114 hectares of new plantings (including top-working and replacements) in the 2019-20 planting season, the majority being Cabernet Sauvignon.

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													
Barbera	2				2						0%	2	\$3,278
Cabernet Franc									1	100%		1	\$2,191
Cabernet Sauvignon	1,653			1,047	431	175	\$2,562,944	\$1,550	6%	2,592	61%	4,245	\$6,580,731
Malbec	23			20	3		\$25,910	\$1,125	-1%		0%	23	\$25,910
Merlot	272			167	86	19	\$372,820	\$1,372	23%	653	71%	925	\$1,269,108
Petit Verdot										20	100%	20	\$22,711
Pinot Noir	140			140			\$155,217	\$1,110	7%	224	62%	364	\$404,438
Sangiovese										20	100%	20	\$26,855
Shiraz	1,317			864	285	168	\$2,027,525	\$1,539	9%	1,648	56%	2,965	\$4,564,615
Tempranillo	9					9				2	22%	11	\$30,940
Red total	3,416			2,237	808	371	\$5,171,831	\$1,514	11%	5,161	60%	8,577	\$12,930,776
White													
Chardonnay	710			635		74	\$706,739	\$996	26%	561	44%	1,271	\$1,265,420
Gewurztraminer	3			3							0%	3	\$2,900
Pinot Gris/Grigio	536			456	80		\$680,201	\$1,269	41%	1,317	71%	1,853	\$2,351,584
Prosecco	34			34							0%	34	\$25,830
Riesling	12			12						35	75%	47	\$46,600
Sauvignon Blanc	178			178						352	66%	530	\$425,234
Semillon										46	100%	46	\$43,276
Viognier										11	100%	11	\$15,709
White total	1,473			1,319	80	74	\$1,570,411	\$1,066	39%	2,322	61%	3,795	\$4,176,554
Grand total	4,889			3,556	888	445	\$6,742,242	\$1,379	9%	7,483	60%	12,372	\$17,107,330

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

<i>Variety</i>	<i>Pre-2017</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Total area</i>	<i>% planted in 2019</i>
Red winegrapes						
Cabernet Sauvignon	1,214	9	0	71	1,294	5%
Malbec	8	0	0	5	13	38%
Merlot	223	0	0	0	223	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	699	8	11	36	754	5%
Tempranillo	9	0	0	0	9	0%
Other Red	13	0	0	2	15	13%
Total red varieties	2,229	17	11	114	2,371	5%
White winegrapes						
Chardonnay	168	0	0	0	168	0%
Pinot Gris	99	0	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	15	0	2	0	17	0%
Total white varieties	353	0	2	0	355	0%
Unknown variety	6	0	0	0	6	0%
Total all varieties	2,588	17	13	114	2,732	4%

Source:
Vinehealth
Australia

Explanations and definitions

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 specific amounts paid for 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 2020).

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.

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.

Explanatory notes for planting data tables

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 seven, 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 2020 and include all plantings from the 2019–20 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.

Acknowledgements

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.

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 www.winesa.asn.au.

Credits

Images – Wine Australia
GI maps – Vinehealth Australia

About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), growing domestic and international markets, protecting the reputation of Australian wine and administering the Export and Regional Wine Support Package (ERWSP).

Wine Australia is an Australian Commonwealth Government statutory authority, established under the *Wine Australia Act 2013*, and funded by grape growers and winemakers through levies and user-pays charges and the Australian Government, which provides matching funding for RDA investments and funds the ERWSP.

Disclaimer

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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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