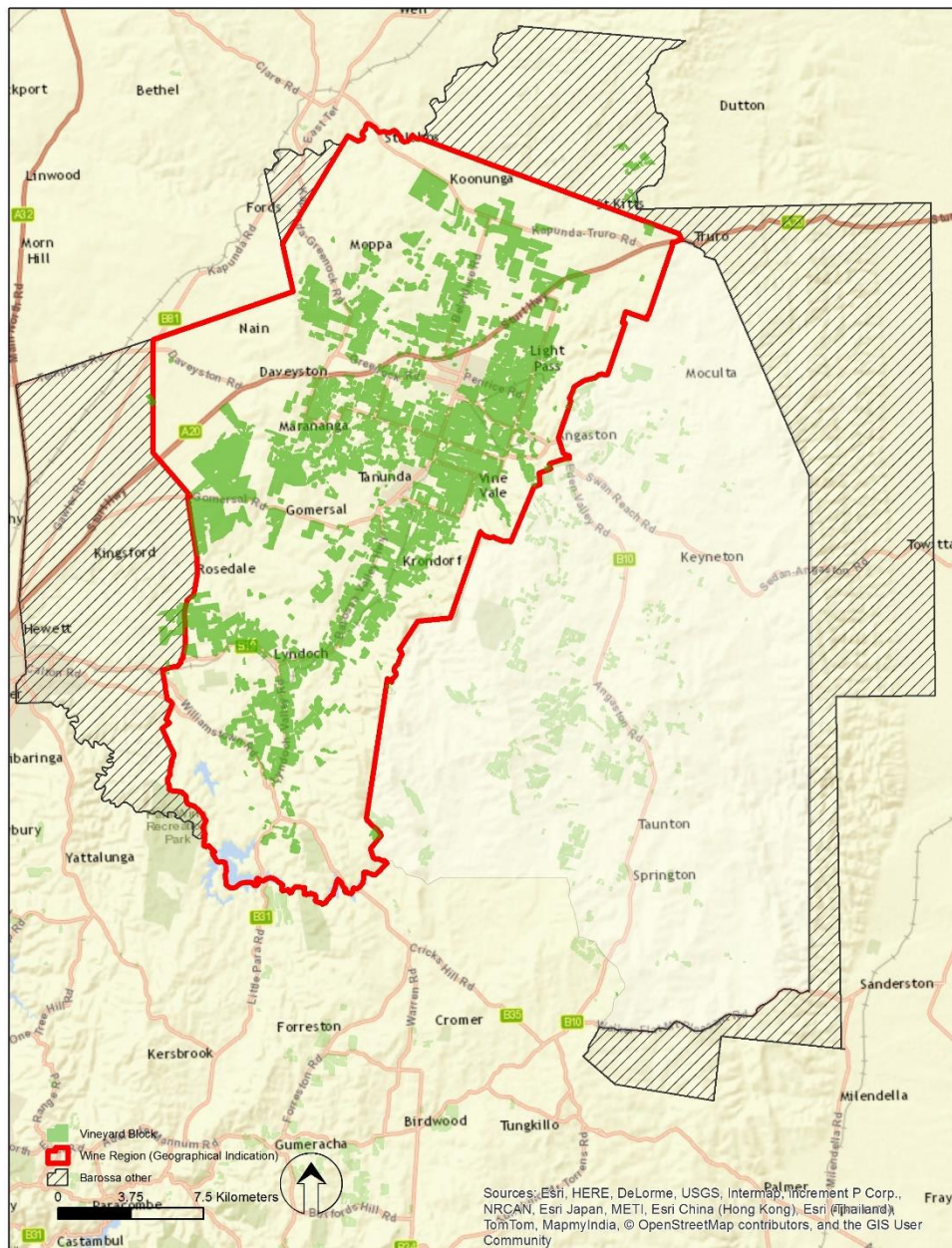


# SA Winegrape Crush Survey

## Regional Summary Report 2017

### Barossa Valley Wine Region (inc Barossa Zone other)

*Wine Australia July 2017*



DATUM: GDA94  
PROJECTION: MGA Zone 54  
DATE: 8<sup>th</sup> March 2017  
SOFTWARE: ESRI ArcGIS v10.4  
DATA SOURCE:  
Vineyard Block - Vinehealth Australia  
Wine Region - Wine Australia

Barossa Valley Wine Region  
inc Barossa Zone other



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# Barossa Valley

## Vintage overview

### VINTAGE REPORT

Barossa's 2017 vintage finally wrapped up a month or more later than in recent years, with some stand-out wines showing a lot of promise and an overall yield 20-30% above a low five-year average.

In stark contrast to the previous year, the 2016 growing season was one of the wettest on record. Annual (2016) rainfall was 750mm, over 150% of the long term average; winter was 143%, spring 198% and December 135% of average. The resulting wet soils, combined with a cooler than average spring and early summer meant the vines grew slowly but healthily.

As the grapes went through veraison in January and February 2017, Barossa experienced generally average temperatures and only two short bursts of high temperatures. Two well-timed rain events in late January and early February kept vines healthy and in no rush to ripen, with the rest of February remaining dry.

March saw the beginning of an Indian summer, which lasted until late April. This was perfect for consistent ripening of grapes, with good colour development and natural acidity. The average minimum and maximum temperatures for March were 2 to 3°C above average, followed by a notable shift to much cooler nights from late March onwards, which extended vintage for many into May.

Another solid year for Barossa Shiraz, the 2017 vintage promises to deliver an exciting array of wine styles, from "bright, aromatic wines", through to "vibrant, intense, well-structured" and "dense, concentrated" wines from Barossa's many diverse sites.

Other strong varieties for 2017 include Semillon, Cabernet Sauvignon, Grenache and Mataro.

*Nicki Robins, Barossa Grape & Wine Association*

### OVERVIEW OF VINTAGE STATISTICS

Barossa Valley's crush came in at 73,174<sup>1</sup> tonnes in 2017 – up nearly 20,000 tonnes compared with 2016.

Over the last 5 years, the average Barossa Valley production is 52,082 tonnes, with a low of 43,824 tonnes in 2013. The 2017 crush is the highest in the five year period, and in fact the highest since 2006.

The total value of grapes from the region is estimated to have been \$147 million, up from \$102 million in 2016.

Most of the major varieties recorded an increase in average price paid. The average price of Shiraz increased by 2% to a record \$2,284 per tonne. The average price of Cabernet Sauvignon increased 8% to \$2,049 per tonnes, also a record. Average prices also increased for Grenache (up 5% to \$1698) and Semillon (up 6% to \$720 per tonne) while Chardonnay was stable at \$601 per tonne.

The price dispersion data shows that 65% of red grapes were purchased at over \$2000 per tonne (compared with 60% in 2016 and 40% in 2015), while 91% were purchased at \$1500 or more.

There were 87 hectares of new plantings in the Barossa Valley in 2016 (including top-working and replacements) compared with 304 hectares planted in 2015 and 255 hectares in 2014. Of the new plantings, Shiraz accounted for nearly three-quarters (77 hectares) and Cabernet Sauvignon 15% (13 hectares).

<sup>1</sup> Includes Barossa Zone other (3008 tonnes)

# Barossa Valley

## Winegrape intake summary table - red

*Includes Barossa Zone other*

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
<b>Red</b>													
Cabernet Franc	107				98%	0%	\$120,592	\$1,123	2%	53	33%	160	\$179,856
Cabernet Sauvignon	4658				6%	44%	\$9,542,712	\$2,049	8%	3616	44%	8274	\$16,944,838
Durif	83					73%	\$137,012	\$1,659	6%	7	8%	89	\$148,195
Grenache	2658			0%	26%	52%	\$4,512,133	\$1,698	5%	1183	31%	3842	\$6,519,108
Malbec	29					61%	\$50,775	\$1,759	8%	71	71%	100	\$176,159
Mataro/Mourvedre	764				2%	53%	\$1,511,232	\$1,979	5%	474	38%	1238	\$2,451,547
Merlot	1456				78%	22%	\$1,636,033	\$1,123	4%	251	15%	1707	\$1,920,909
Montepulciano	11									33	76%	44	\$92,148
Muscat a Petit Grains Rouge/Rose	13											13	\$12,287
Nero d'Avola	16									12	44%	28	\$38,764
Petit Verdot	39				57%	13%	\$49,457	\$1,273	-6%	33	46%	72	\$91,087
Pinot Noir	200				100%		\$146,648	\$734	-7%			200	\$146,648
Sangiovese	296				94%		\$406,874	\$1,375	1%	67	18%	363	\$498,935
Shiraz	26386	0%	0%		1%	18%	\$60,257,201	\$2,284	2%	22456	46%	48844	\$110,771,400
Tempranillo	357				6%	93%	\$583,598	\$1,635	4%	104	23%	461	\$754,849
Other red	137				54%	21%	\$221,992	\$1,623	1%	149	52%	286	\$464,461
<b>Total red</b>	<b>37208</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>9%</b>	<b>25%</b>	<b>\$79,232,260</b>	<b>\$2,129</b>	<b>5%</b>	<b>28513</b>	<b>43%</b>	<b>65720</b>	<b>\$141,211,191</b>

# Barossa Valley

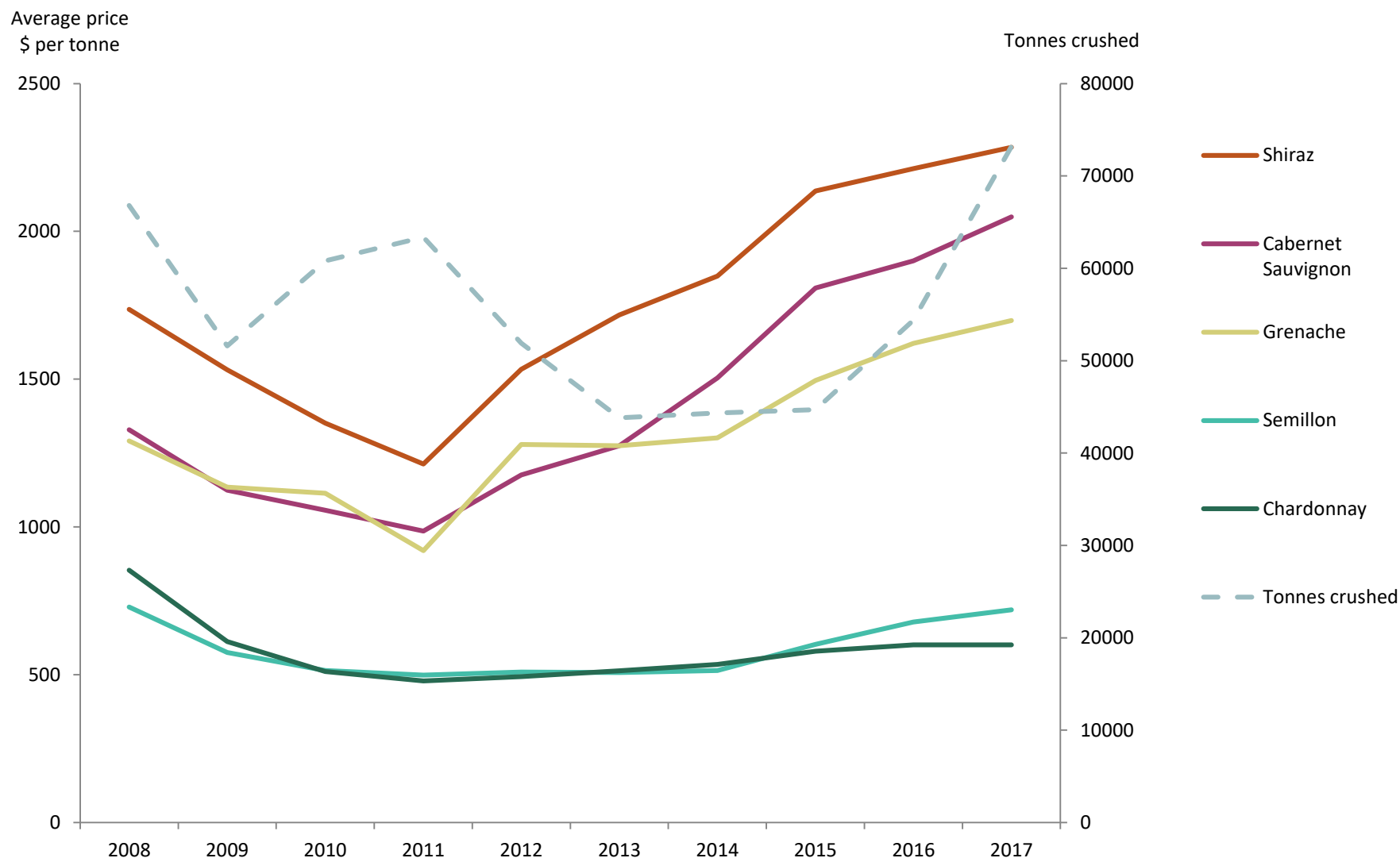
## Winegrape intake summary table - white

*Includes Barossa Zone other*

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
<b>White</b>													
Chardonnay	1517		31%	69%			\$911,823	\$601	0%	466	23%	1983	\$1,191,558
Chenin blanc	37		34%	44%	22%		\$32,688	\$885	-22%			37	\$32,688
Fiano										32	100%	32	\$24,037
Gewurztraminer	107											107	\$80,762
Marsanne	13									57	82%	70	\$118,509
Moscato Giallo	11											11	\$8,640
Muscadelle (Tokay)	21		11%	89%			\$16,152	\$760	-5%			21	\$16,152
Muscat a Petit Grains Blanc	270		50%	50%			\$197,676	\$732	-9%	87	24%	357	\$261,095
Pinot Gris/Grigio	80			100%			\$79,358	\$990	13%	80	50%	160	\$158,290
Riesling	644	0%	2%	96%	2%		\$540,527	\$839	5%	351	35%	998	\$975,903
Roussanne	22				100%		\$36,168	\$1,610	30%	2	9%	25	\$39,921
Sauvignon Blanc	521	0%	9%	91%			\$420,731	\$808	-2%	33	6%	555	\$448,763
Semillon	1968	0%	28%	72%	0%	0%	\$1,417,076	\$720	6%	444	18%	2414	\$1,739,123
Vermentino	79									7	9%	87	\$81,988
Viognier	298			91%	2%	6%	\$378,782	\$1,273	-2%	52	15%	350	\$445,169
Other white	31			65%	35%		\$35,569	\$1,154	-4%	216	88%	247	\$285,080
<b>Total white</b>	<b>5620</b>	<b>0%</b>	<b>22%</b>	<b>77%</b>	<b>1%</b>	<b>1%</b>	<b>\$4,252,813</b>	<b>\$757</b>	<b>0%</b>	<b>1827</b>	<b>25%</b>	<b>7454</b>	<b>\$5,907,679</b>
<b>Total all varieties</b>	<b>42828</b>	<b>0%</b>	<b>3%</b>	<b>18%</b>	<b>22%</b>	<b>58%</b>	<b>\$83,485,073</b>	<b>\$1,949</b>	<b>7%</b>	<b>30337</b>	<b>41%</b>	<b>73174</b>	<b>\$147,118,870</b>

# Barossa Valley

## Historical weighted average price vs tonnes crushed



# Barossa Valley

## Current plantings by variety and year planted – red winegrapes

*Includes Barossa Zone other (233 hectares total)*

Variety	Current area in hectares				Total area	% planted
	Pre-2014	2014	2015	2016		in 2016
Red winegrapes						
Cabernet Franc	28	0	0	0	28	0%
Cabernet Sauvignon	1,464	20	73	13	1,570	1%
Durif (Petite Sirah)	20	0	1	0	21	0%
Grenache	663	2	0	5	670	1%
Malbec	24	0	2	0	26	0%
Mataro (Mourvedre)	250	4	3	0	257	0%
Merlot	338	0	0	1	339	0%
Other Red	99	3	2	2	105	2%
Petit Verdot	19	0	0	0	19	0%
Pinot Noir	37	0	0	0	37	0%
Sangiovese	27	0	0	0	27	0%
Shiraz	6,554	224	220	64	7,061	1%
Tempranillo	99	0	2	1	102	1%
Zinfandel	13	0	0	0	13	0%
Total red varieties	9,634	253	302	87	10,276	1%

Source: Vinehealth Australia

# Barossa Valley

## Current plantings by variety and year planted – white winegrapes

*Includes Barossa Zone other (233 hectares total)*

Variety	Current area in hectares				Total area	% planted in 2016
	Pre-2014	2014	2015	2016		
White winegrapes						
Chardonnay	328	0	0	0	328	0%
Chenin Blanc	15	0	0	0	15	0%
Marsanne	11	0	0	0	11	0%
Muscadelle (Tokay)	13	0	0	0	13	0%
Muscat A Petit Grains Blanc	53	1	0	0	54	0%
Other White	47	0	0	0	48	0%
Pedro Ximenez	5	0	0	0	5	0%
Pinot Gris	16	0	1	0	16	0%
Riesling	168	0	1	0	169	0%
Sauvignon Blanc	60	0	0	0	60	0%
Savagnin	1	0	0	0	1	0%
Semillon	352	0	0	0	352	0%
Vermentino	7	0	0	0	7	0%
Viognier	57	0	0	0	57	0%
Total white varieties	1,133	2	2	0	1,137	0%
Unknown variety	112	0	0	0	112	0%
Total all varieties	10,879	255	304	87	11,525	1%

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%; 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 2017).

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.

### **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. It should also be noted that in minor varieties there may sometimes be very few purchases contributing towards a calculated average purchase value.

### *Price dispersion data (shaded columns in Intake Summary tables)*

All purchases for each variety are grouped into categories according to the price paid for that fruit. The tonnes in each category are converted into a percentage of the total tonnes purchased, giving an indication of what share of fruit was purchased in each price range category. The categories are given nominal titles of A to E for convenience but these do not correspond with grades used by any particular winery.

### *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 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 cont.d

## PLANTING DATA

### *Source of planting data tables*

Planting data is not collected by the 2017 Australian Wine Sector 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.

Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from Vinehealth Australia.

For more information on registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.

### **Explanatory notes for planting data tables**

1. Planting data tables are current as at April 2017 and include all plantings from the 2016 planting season.
2. 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 2017 report compared with previous reports.
3. 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 variations between tables.

## AUSTRALIAN WINE SECTOR SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian Wine Sector 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 provided by Brendan Tully, Vinehealth Australia.

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

### **Disclaimer**

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