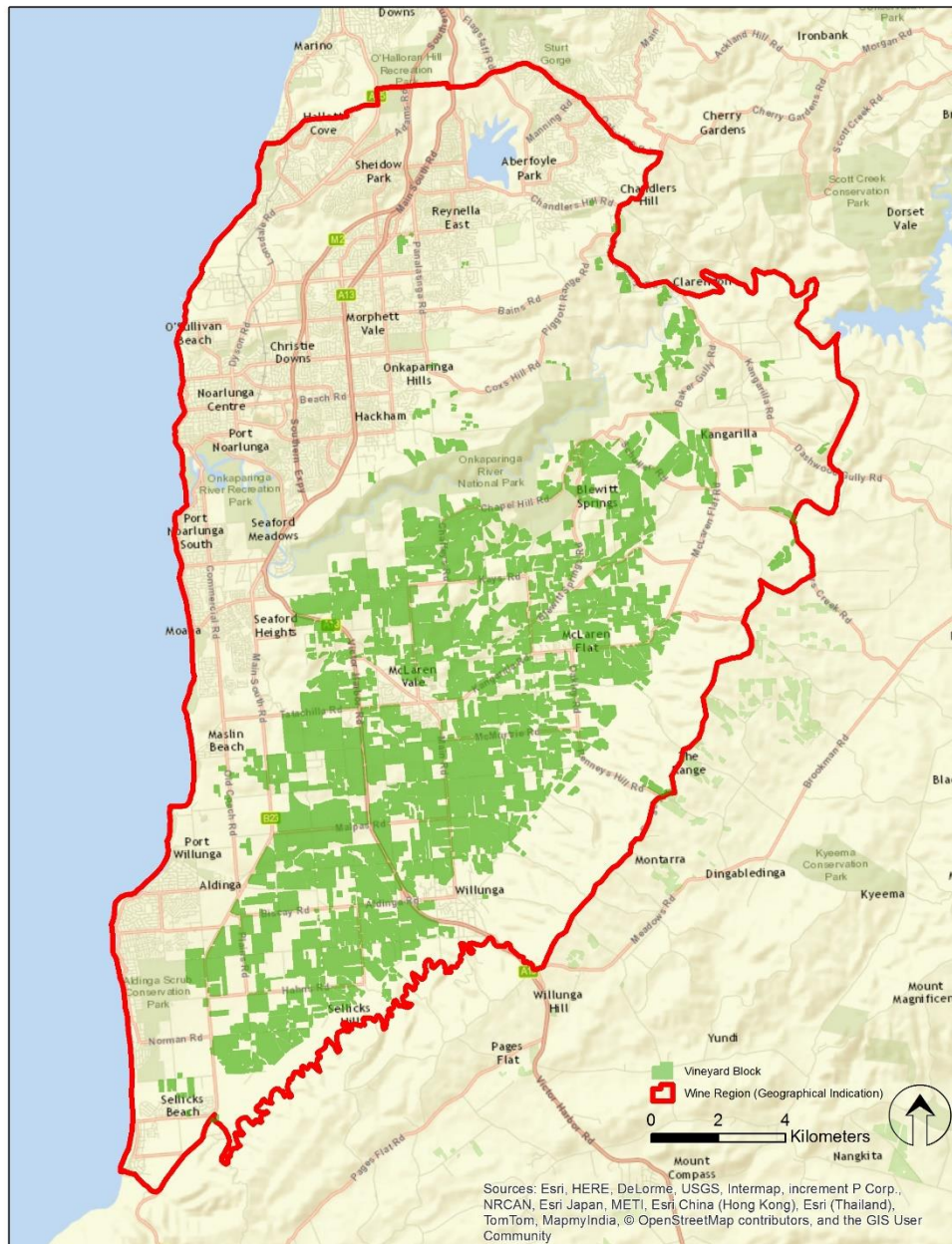


# SA Winegrape Crush Survey

## Regional Summary Report 2017

### McLaren Vale Wine Region

*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

## McLaren Vale Wine Region



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# McLaren Vale

## Vintage overview

### VINTAGE REPORT

Vintage 2017 in the McLaren Vale Wine Region was judged highly successful for both grape growers, who had above average crops with minimal faults, and winemakers who had the ability to pick fruit as they required during an extended dry autumn.

Winter weather conditions help set up the early growth of our vineyards with above average rainfall leading to full soil profiles.

Spring was also significantly wetter than average. There were notable large storms and high winds with frequent low-pressure fronts moving through the region. Fortunately, the weather patterns during flowering were relatively stable and dry. Spring air temperatures were cooler than average and flowering was delayed by 14-21 days compared to recent seasons, while veraison was also delayed.

Harvest began later than in 2016, with very few vineyards picked in February, with picking continuing into late April.

There was one significant rain event of approximately 25mm in the first week of February. Fortunately, this did not cause widespread berry splitting and Botrytis levels remained low in the aftermath. Weather conditions during March were stable, with little natural rainfall, although there were some morning dews.

Autumn continued to be warm and dry through early April allowing almost all vineyards to be successfully harvested.

The earlier picked red vineyards, including Shiraz and Tempranillo, have been described as having good fruit characters; winemaking reports are they are lively, bright, spicy, vibrant, and elegant. Towards the end of vintage, parcels of Grenache and Cabernet Sauvignon and Mourvèdre were described as excellent examples of these grape styles.

*James Hook, McLaren Vale Grape, Wine and Tourism Association*

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### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from McLaren Vale was 44,287 tonnes in 2017, compared to 40,997 tonnes in 2016.

Over the past five years, the average crush has been 33,901 tonnes. This year's vintage was the largest in the past five years with the smallest being the 2015 harvest at 28,434 tonnes. (This may have been partly attributable to a low regional response rate.)

The total estimated value of the fruit was \$71 million, up from \$66 million, reflecting the increased tonnage. There were mixed results in the average price paid for the major varieties. The average price of Shiraz declined by 3% to \$1,743 per tonne while Cabernet Sauvignon increased by 3% to \$1574 per tonne, and Chardonnay by 3% to \$709 per tonne.

The price dispersion data shows that 66% of red fruit was purchased at over \$1500, compared with 65% in 2016 and 45% in 2015. For the whites, 80% was purchased between \$600 and \$1500 and only 8% at above \$1500.

There were 67 hectares of new plantings in McLaren Vale in spring 2016, compared with 66 hectares in 2015. 88% were red varieties, with just under half being Shiraz.

*NB It is estimated that the total crush for McLaren Vale is close to 60,000 tonnes, based on planted area, average yields and levy returns supplied to Primary Industries and Regions SA.*

# McLaren Vale

## Winegrape intake summary table - red

| 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>                       |                  |                     |                 |                   |                     |                  |                       |                                  |                     |                    |                    |               |                            |
| Barbera                          | 20               |                     |                 |                   |                     |                  |                       |                                  |                     | 11                 | 35%                | 30            | \$38,476                   |
| Cabernet Franc                   | 54               |                     |                 | 66%               | 9%                  | 25%              | \$88,331              | \$1,634                          | 36.60%              | 5                  | 9%                 | 59            | \$96,818                   |
| Cabernet Sauvignon               | 4167             |                     |                 | 39%               | 50%                 | 11%              | \$6,560,657           | \$1,574                          | 3.00%               | 3969               | 49%                | 8136          | \$12,809,604               |
| Durif                            |                  |                     |                 |                   |                     |                  |                       |                                  |                     | 17                 | 100%               | 17            | \$28,126                   |
| Grenache                         | 1040             |                     | 0%              | 34%               | 49%                 | 17%              | \$1,664,351           | \$1,601                          | -1.20%              | 1255               | 55%                | 2295          | \$3,673,806                |
| Malbec                           | 12               |                     |                 |                   |                     |                  |                       |                                  |                     | 15                 | 55%                | 27            | \$36,211                   |
| Mataro/Mourvedre                 | 312              |                     |                 | 40%               | 37%                 | 23%              | \$464,411             | \$1,490                          | -9.70%              | 256                | 45%                | 568           | \$846,132                  |
| Merlot                           | 826              |                     | 18%             | 72%               | 11%                 |                  | \$689,933             | \$835                            | -14.00%             | 556                | 40%                | 1382          | \$1,154,772                |
| Montepulciano                    | 5                |                     |                 |                   |                     |                  |                       |                                  |                     | 4                  | 48%                | 9             | \$18,425                   |
| Muscat a Petit Grains Rouge/Rose |                  |                     |                 |                   |                     |                  |                       |                                  |                     | 0                  | 100%               | 0             | \$463                      |
| Nero d'Avola                     | 28               |                     |                 |                   | 76%                 | 24%              | \$52,720              | \$1,894                          | 10.30%              | 30                 | 52%                | 57            | \$108,868                  |
| Petit Verdot                     | 156              |                     | 63%             | 29%               |                     | 8%               | \$112,142             | \$721                            | -24.50%             | 156                | 50%                | 312           | \$224,719                  |
| Pinot Noir                       | 314              |                     |                 | 100%              |                     |                  | \$257,453             | \$820                            | -1.70%              | 21                 | 6%                 | 335           | \$274,547                  |
| Sangiovese                       | 89               |                     |                 | 26%               | 74%                 |                  | \$135,912             | \$1,532                          | 2.90%               | 179                | 67%                | 268           | \$409,863                  |
| Shiraz                           | 16670            |                     | 0%              | 28%               | 45%                 | 26%              | \$29,063,914          | \$1,743                          | -3.30%              | 10365              | 38%                | 27035         | \$47,134,079               |
| Tempranillo                      | 187              |                     |                 | 10%               | 66%                 | 24%              | \$333,681             | \$1,788                          | 1.90%               | 161                | 46%                | 347           | \$621,477                  |
| Other red                        | 109              |                     |                 | 15%               | 32%                 | 53%              | \$211,327             | \$1,941                          | 4.60%               | 207                | 66%                | 316           | \$613,682                  |
| <b>Total red</b>                 | <b>23987</b>     |                     | <b>1%</b>       | <b>33%</b>        | <b>44%</b>          | <b>22%</b>       | <b>\$39,685,799</b>   | <b>\$1,654</b>                   | <b>-2%</b>          | <b>17207</b>       | <b>42%</b>         | <b>41194</b>  | <b>\$68,090,069</b>        |

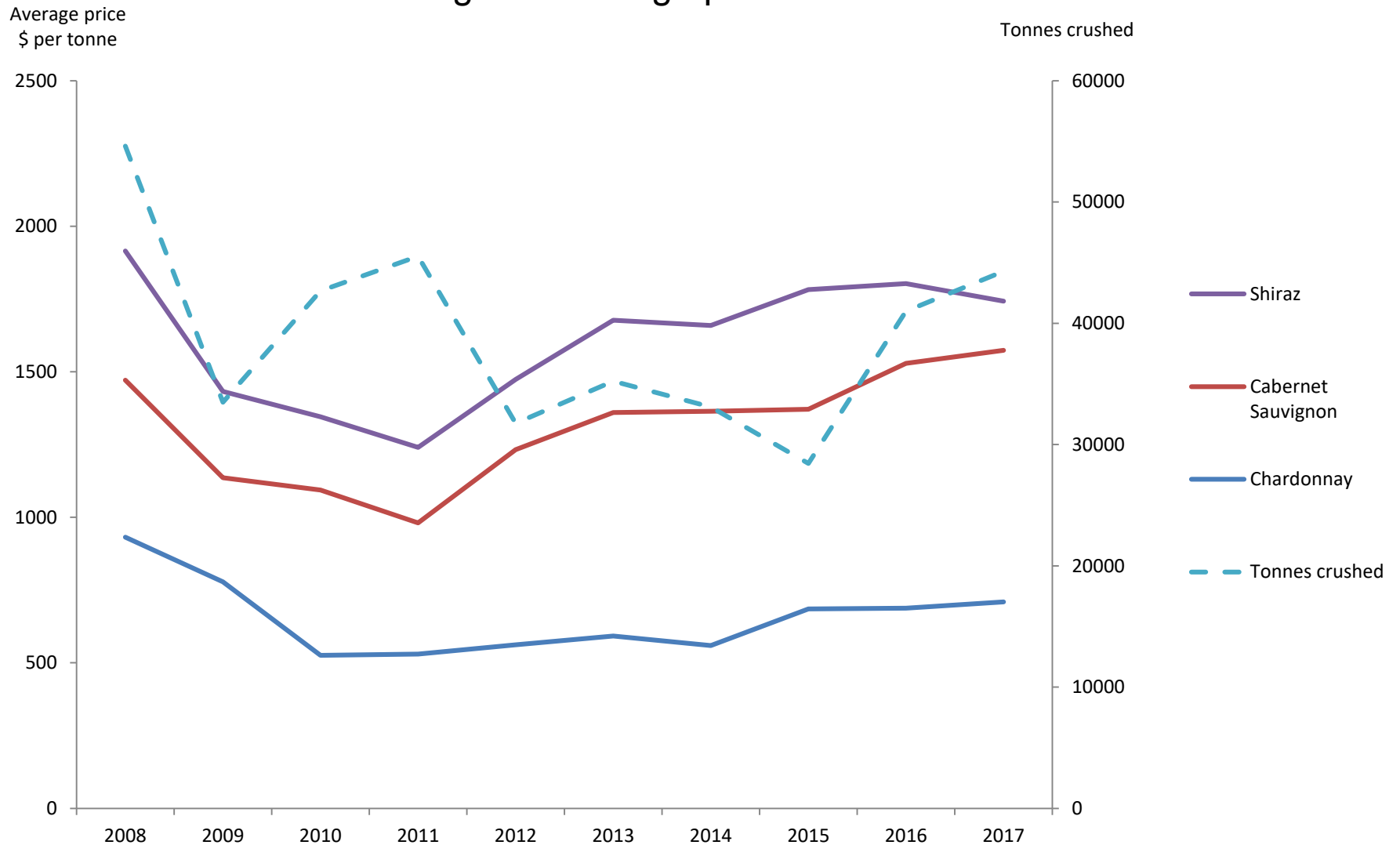
# McLaren Vale

## Winegrape intake summary table - white

| Variety                     | Tonnes purchased | E<br>(less than \$300) | D<br>(\$300-<br>\$600) | C<br>(\$600-<br>\$1,500) | B<br>(\$1,500-<br>\$2,000) | A<br>(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                  | 1191             |                        | 19%                    | 79%                      | 2%                         |                     | \$844,715             | \$709                            | 3.10%               | 427                | 26%                | 1619          | \$1,147,479                |
| Chenin blanc                | 9                |                        |                        |                          |                            |                     |                       |                                  |                     | 15                 | 61%                | 24            | \$24,459                   |
| Fiano                       | 22               |                        |                        |                          | 100%                       |                     | \$38,736              | \$1,784                          | 12.50%              | 7                  | 25%                | 29            | \$51,387                   |
| Gewurztraminer              | 1                |                        |                        |                          |                            |                     |                       |                                  |                     |                    |                    | 1             | \$957                      |
| Marsanne                    |                  |                        |                        |                          |                            |                     |                       |                                  |                     | 39                 | 100%               | 39            | \$33,640                   |
| Moscato Giallo              |                  |                        |                        |                          |                            |                     |                       |                                  |                     | 11                 | 100%               | 11            | \$9,577                    |
| Muscat a Petit Grains Blanc | 64               |                        |                        | 49%                      | 51%                        |                     | \$77,702              | \$1,217                          | -8.50%              | 5                  | 7%                 | 68            | \$83,229                   |
| Pinot Gris/Grigio           | 7                |                        |                        |                          |                            |                     |                       |                                  |                     | 163                | 96%                | 170           | \$170,120                  |
| Riesling                    | 157              |                        |                        |                          |                            |                     |                       |                                  |                     | 18                 | 10%                | 176           | \$205,590                  |
| Roussanne                   |                  |                        |                        |                          |                            |                     |                       |                                  |                     | 77                 | 100%               | 77            | \$67,026                   |
| Sauvignon Blanc             | 182              |                        |                        | 100%                     |                            |                     | \$143,321             | \$788                            | 8.10%               | 108                | 37%                | 290           | \$228,767                  |
| Semillon                    | 26               |                        |                        |                          |                            |                     |                       |                                  |                     | 113                | 81%                | 140           | \$126,871                  |
| Verdelho                    | 64               |                        |                        |                          |                            |                     |                       |                                  |                     | 125                | 66%                | 188           | \$273,179                  |
| Vermentino                  | 57               |                        |                        | 3%                       | 97%                        |                     | \$90,706              | \$1,605                          | 7.40%               | 7                  | 10%                | 63            | \$101,302                  |
| Viognier                    | 139              |                        |                        | 93%                      | 7%                         |                     | \$153,782             | \$1,104                          | -1.20%              | 84                 | 38%                | 224           | \$246,927                  |
| Other white                 | 23               |                        |                        |                          |                            |                     |                       |                                  |                     | 54                 | 71%                | 77            | \$82,541                   |
| <b>Total white</b>          | <b>1941</b>      |                        | <b>12%</b>             | <b>80%</b>               | <b>8%</b>                  | <b>0%</b>           | <b>\$1,690,172</b>    | <b>\$871</b>                     | <b>5%</b>           | <b>1254</b>        | <b>39%</b>         | <b>3195</b>   | <b>\$2,853,051</b>         |
| <b>Total all varieties</b>  | <b>25928</b>     |                        | <b>2%</b>              | <b>36%</b>               | <b>41%</b>                 | <b>20%</b>          | <b>\$41,375,972</b>   | <b>\$1,596</b>                   | <b>0%</b>           | <b>18461</b>       | <b>42%</b>         | <b>44390</b>  | <b>\$70,943,120</b>        |

# McLaren Vale

## Historical weighted average price vs tonnes crushed



# McLaren Vale

## Current plantings by variety and year planted

| Variety  | Current area in hectares |            |           |           | 2016 Total area | % planted in 2016 |
|--|--------------------------|------------|-----------|-----------|-----------------|-------------------|
|  | Pre-2014                 | 2014       | 2015      | 2016      |                 |                   |
| <b>Red winegrapes</b>                          |                          |            |           |           |                 |                   |
| Barbera  | 11                       | 0          | 0         | 0         | 11              | 0%                |
| Cabernet Franc                                 | 26                       | 0          | 1         | 0         | 27              | 0%                |
| Cabernet Sauvignon                             | 1,259                    | 25         | 15        | 12        | 1,311           | 1%                |
| Grenache                                       | 440                      | 2          | 4         | 6         | 452             | 1%                |
| Mataro (Mourvedre)                             | 77                       | 6          | 2         | 4         | 89              | 4%                |
| Merlot   | 219                      | 0          | 0         | 1         | 220             | 0%                |
| Other Red                                      | 89                       | 8          | 5         | 8         | 110             | 7%                |
| Petit Verdot                                   | 48                       | 0          | 0         | 0         | 48              | 0%                |
| Pinot Noir                                     | 52                       | 0          | 0         | 0         | 52              | 0%                |
| Sangiovese                                     | 44                       | 0          | 0         | 0         | 44              | 0%                |
| Shiraz   | 3,858                    | 88         | 38        | 28        | 4,012           | 1%                |
| Tempranillo                                    | 59                       | 0          | 1         | 0         | 60              | 0%                |
| <b>Total red varieties</b>                     | <b>6,180</b>             | <b>130</b> | <b>66</b> | <b>59</b> | <b>6,435</b>    | <b>1%</b>         |
| <b>White winegrapes</b>                        |                          |            |           |           |                 |                   |
| Chardonnay                                     | 370                      | 0          | 0         | 2         | 372             | 0%                |
| Chenin Blanc                                   | 17                       | 0          | 0         | 0         | 17              | 0%                |
| Marsanne                                       | 11                       | 0          | 0         | 0         | 11              | 0%                |
| Muscat A Petit Grains Blanc (White Frontignac) | 11                       | 0          | 0         | 0         | 12              | 1%                |
| Other White                                    | 32                       | 0          | 0         | 6         | 39              | 17%               |
| Pinot Gris                                     | 20                       | 0          | 0         | 0         | 20              | 0%                |
| Riesling                                       | 32                       | 0          | 0         | 0         | 32              | 0%                |
| Sauvignon Blanc                                | 62                       | 0          | 0         | 0         | 62              | 0%                |
| Savagnin                                       | 3                        | 0          | 0         | 0         | 3               | 0%                |
| Semillon                                       | 34                       | 0          | 0         | 0         | 34              | 0%                |
| Verdelho                                       | 14                       | 0          | 0         | 0         | 15              | 0%                |
| Vermentino                                     | 8                        | 0          | 0         | 0         | 8               | 0%                |
| Viognier                                       | 52                       | 0          | 0         | 0         | 52              | 0%                |
| <b>Total white varieties</b>                   | <b>667</b>               | <b>1</b>   | <b>0</b>  | <b>8</b>  | <b>676</b>      | <b>1%</b>         |
| Rootstock Block                                | 4                        | 0          | 0         | 0         | 4               | 0%                |
| Multi-purpose white                            | 3                        | 0          | 0         | 0         | 3               | 1%                |
| Unknown variety                                | 199                      | 0          | 0         | 0         | 199             | 0%                |
| <b>Total all varieties</b>                     | <b>7,053</b>             | <b>131</b> | <b>66</b> | <b>67</b> | <b>7,317</b>    | <b>1%</b>         |

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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