



SA Winegrape Crush Survey

Regional Summary Report 2017

Adelaide Plains Wine Region

Wine Australia July 2017

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

Adelaide Plains Wine Region



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Adelaide Plains

Vintage overview

OVERVIEW OF VINTAGE STATISTICS

A total of 3,496 tonnes of Adelaide Plains winegrapes were crushed in 2017, down from 4,396 tonnes in 2016 but more than the 3,091 tonnes crushed in 2015.

The five year average crush from this region (2013-2017) is 3,843 tonnes, implying that the 2017 yield overall was 9% below average. The minimum crush over the period was the 2015 vintage of 3,091 tonnes and the maximum crush of 4,396 tonnes was recorded in 2013.

The total value of winegrapes declined to just over \$3 million. For most varieties the average price paid increased. Shiraz increased by 7% to \$888 per tonne, Merlot by 6% to 737 per tonne and Cabernet Sauvignon by 1% to \$947 per tonne.

The price dispersion data shows that 95% of red varieties were purchased at between \$600 and \$1500, while 3% were purchased at over \$1500. However, this year, only 1% of the red varieties were purchased at below \$600 per tonne compared with 2015 when 26% of fruit was purchased below \$600 per tonne. The distribution of prices also showed an improvement for the whites, with only 9% being purchased at below \$600 per tonne compared with 17% in 2016 and 37% in 2015.

There were 5 hectares of new plantings in Adelaide Plains in 2016, with 3 hectares being Pinot Gris/Grigio.

Adelaide Plains

Winegrape intake summary table

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
Red													
Cabernet Sauvignon	341			92%	8%		\$323,406	\$947	1%	13	4%	354	\$335,534
Grenache	110											110	\$74,818
Mataro/Mourvedre	56											56	\$56,715
Merlot	284			100%			\$209,054	\$737	6%			284	\$209,054
Shiraz	1845		1%	95%	3%	1%	\$1,638,373	\$888	7%	13	1%	1858	\$1,650,274
Tempranillo	7											7	\$6,560
Total red	2642		1%	95%	3%	0%	\$2,308,925	\$874	2%	26	1%	2669	\$2,332,954
White													
Chardonnay	139											139	\$119,112
Colombard										54	100%	54	\$44,972
Pinot Gris/Grigio	231											231	\$229,925
Sauvignon Blanc	331											331	\$263,832
Semillon	73											73	\$37,225
Total white	774		9%	91%			\$650,095	\$840	4%	54	6%	827	\$695,067
Total all varieties	3416		3%	94%	3%	0%	\$2,959,020	\$866	3%	80	2%	3496	\$3,028,021

Adelaide Plains

Current plantings by variety and year planted

Variety	Current area in hectares					% planted in 2016
	Pre-2014	2014	2015	2016	Total area	
Red winegrapes						
Cabernet Sauvignon	53	0	0	0	53	0%
Grenache	30	0	0	0	31	1%
Malbec	2	0	0	0	2	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	39	0	0	0	39	0%
Other Red	11	0	0	0	11	0%
Pinot Noir	13	0	0	0	13	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	185	0	0	0	185	0%
Tempranillo	2	0	0	0	2	0%
Total red varieties	349	0	0	0	350	0%
White winegrapes						
Chardonnay	28	0	0	0	28	0%
Chenin Blanc	5	0	0	0	5	0%
Colombard	6	0	0	0	6	0%
Other White	4	0	0	2	6	26%
Pinot Gris	28	0	0	3	31	10%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	27	0	0	0	27	0%
Semillon	5	0	0	0	5	0%
Total white varieties	110	0	0	4	114	4%
Unknown variety	13	0	0	0	13	0%
Total all varieties	472	0	0	5	477	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, 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

Disclaimer

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