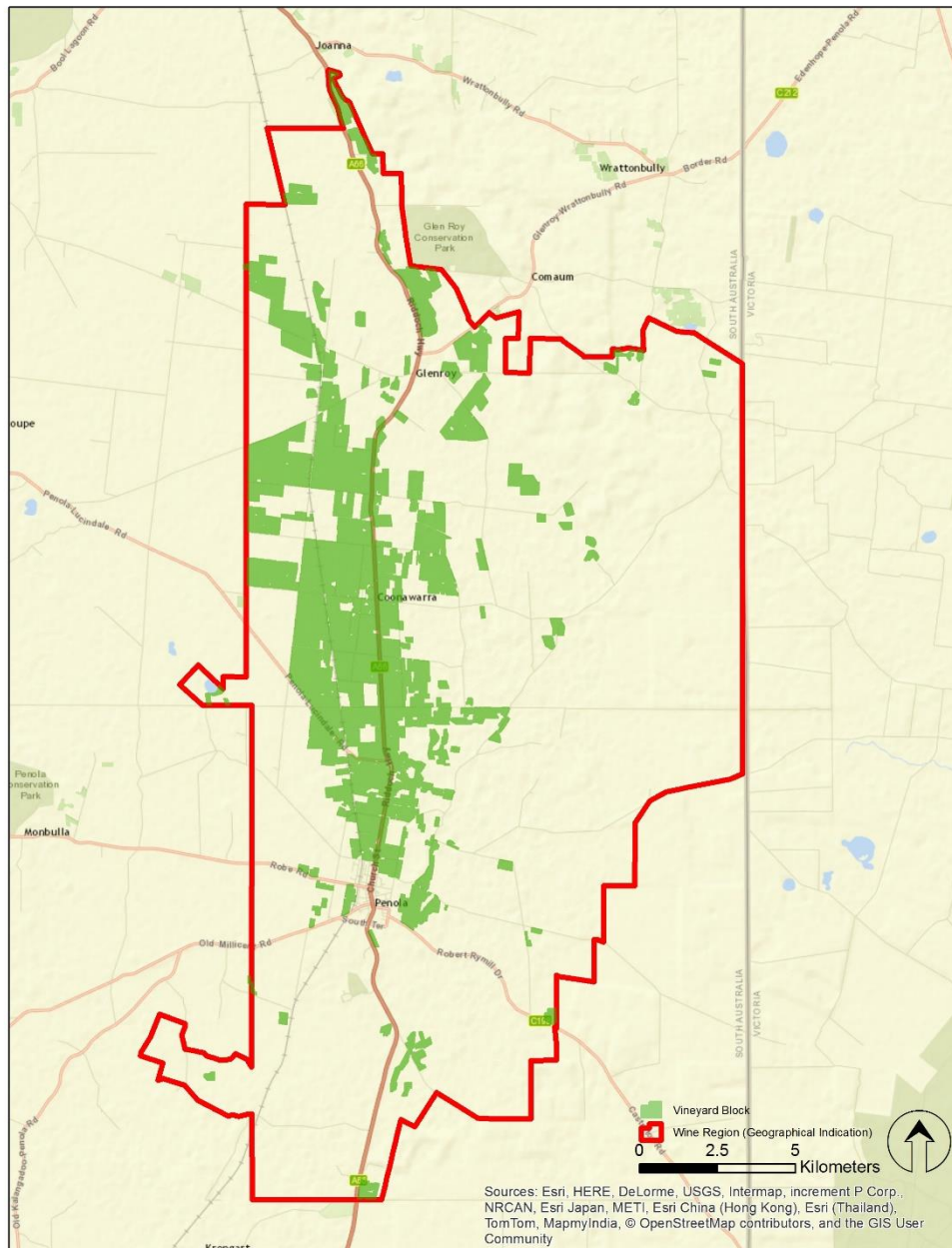


# SA Winegrape Crush Survey

## Regional Summary Report 2017

### Coonawarra 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

### Coonawarra Wine Region



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# Coonawarra

## Vintage overview

### VINTAGE REPORT

A cool growing season and above average winter rains leading into the 2017 vintage saw the region return to what could be best described as a more traditional Coonawarra vintage. The cooler conditions resulted in budburst being delayed by up to three weeks, with flowering two weeks later. A mild summer followed, with a welcome spell of hot days in late January.

These factors saw harvest commence towards the end of March and continue through to early May. Coonawarra has not had a vintage which commenced this late since the outstanding 2004 vintage. The major concern was the highly variable weather which can occur at this time of year.

The start of vintage saw white grapes with good varietal definition and the reds, albeit at lower sugar levels than recent vintages showing excellent colour and concentrated fruit flavours.

April saw a large rain event toward the end of the month, and this, combined with above average yields meant that not all fruit in Coonawarra was harvested. With the integrity and reputation of Coonawarra of upmost importance, it was pleasing that grape growers and winemakers alike refused to pick fruit of inferior quality, and with this in mind it is anticipated that yield for the region will be similar to previous years.

Reports of good quality wines in tanks around the area are common, with winemakers being impressed with the fruitiness of the whites, the deep colour, and elegant fruit flavours of the medium bodied reds.

*Allen Jenkins, President, Coonawarra Grape & Wine Incorporated*

### OVERVIEW OF VINTAGE STATISTICS

A total of 36,509 tonnes of Coonawarra winegrapes were crushed in 2017, up from 35,497 tonnes in 2016.

Over the past five years, the average crush of Coonawarra fruit is 31,385 tonnes, making the 2017 crush the largest in the period and 16% above the average. The smallest in the period was 23,480 tonnes in 2014.

The total value of winegrapes declined from \$47 million to \$41 million due to lower average prices for the major red varieties. Cabernet Sauvignon decreased by 25% to \$1,172 per tonne and Shiraz by 7% to \$1,216 per tonne.

The price dispersion data shows that 68% of Cabernet Sauvignon tonnes were purchased at between \$600 and \$1500, while 24% were purchased at over \$1500. For Shiraz, 66% was purchased between \$600 and \$1500 and 29% at above \$1500. On the other hand, in the white varieties more than 20% of fruit was purchased at below \$600 per tonne.

There were just three hectares of new vines planted in Coonawarra in the 2016, after 96 hectares the previous year. Total area remained stable at 5827 hectares.

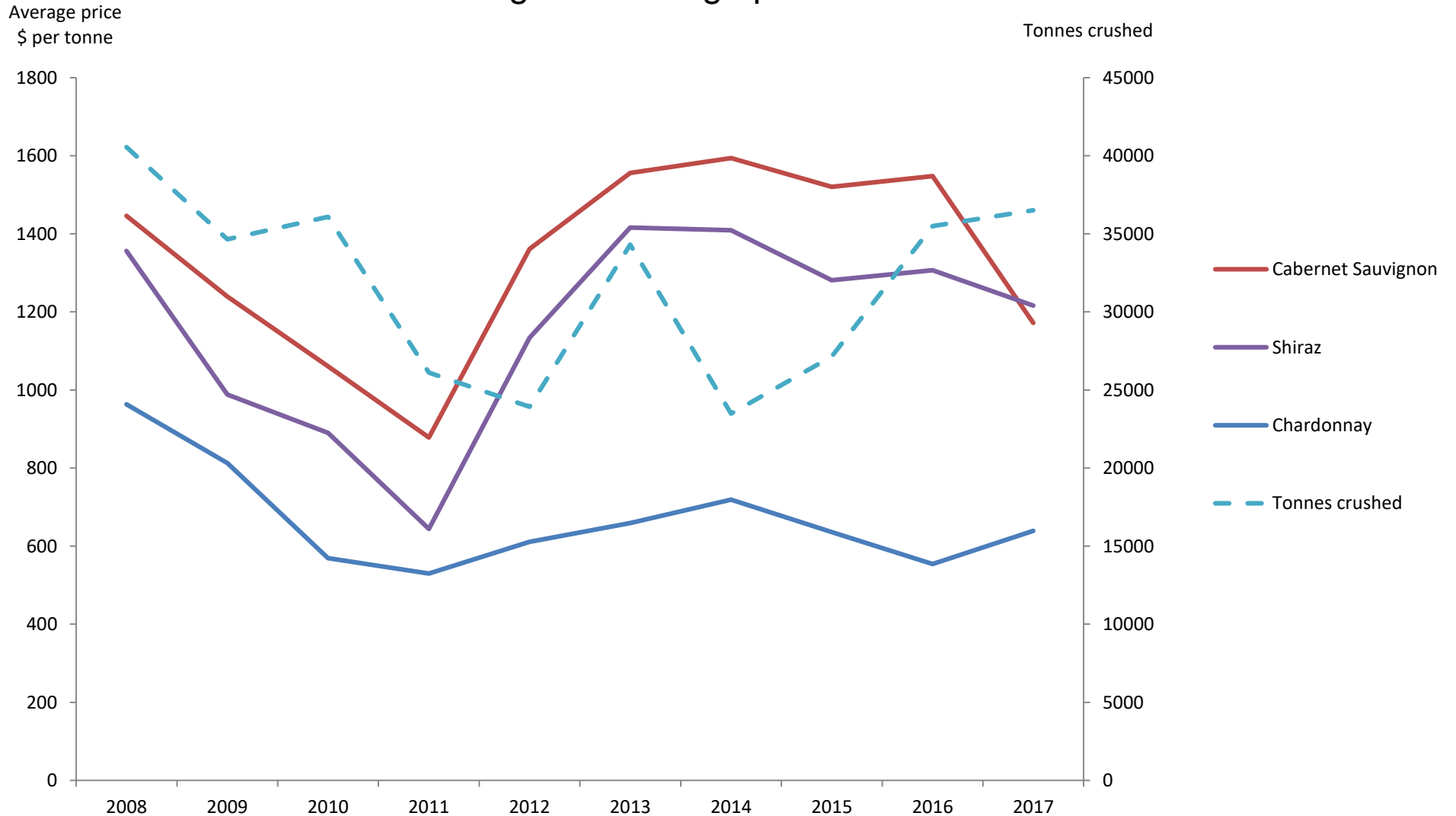
# Coonawarra

## 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
<b>Red</b>													
Cabernet Franc	8			83%	17%		\$8,092	\$1,066	-3%	65	90%	72	\$77,136
Cabernet Sauvignon	6760	4%	3%	68%	18%	6%	\$7,924,231	\$1,172	-25%	12630	65%	19390	\$22,729,282
Malbec	6				100%		\$12,217	\$1,980		83	93%	90	\$177,329
Merlot	462		6%	89%	5%		\$445,729	\$965	10%	1546	77%	2008	\$1,937,504
Petit Verdot	18			100%			\$19,250	\$1,100		133	88%	151	\$165,759
Pinot Meunier										30	100%	30	\$34,953
Pinot Noir	89			100%			\$92,076	\$1,036	-11%	127	59%	216	\$224,028
Shiraz	1770		5%	66%	29%		\$2,153,171	\$1,216	-7%	8781	83%	10551	\$12,834,253
Other red	26											26	\$42,409
<b>Total red</b>	<b>9138</b>	<b>3%</b>	<b>4%</b>	<b>69%</b>	<b>20%</b>	<b>5%</b>	<b>\$10,697,175</b>	<b>\$1,171</b>	<b>-22%</b>	<b>23395</b>	<b>72%</b>	<b>32533</b>	<b>\$38,222,652</b>
<b>White</b>													
Chardonnay	478	0%	19%	81%			\$305,729	\$639	15%	1466	75%	1945	\$1,243,277
Gewurztraminer										18	100%	18	\$12,629
Pinot Gris/Grigio	15											15	\$18,072
Riesling	33			100%			\$26,839	\$815	-4%	604	95%	637	\$519,356
Sauvignon Blanc	296		30%	70%			\$226,843	\$766	14%	866	75%	1162	\$889,649
Semillon	45			100%			\$43,806	\$980		135	75%	180	\$176,251
Other white										19	100%	19	\$13,566
<b>Total white</b>	<b>867</b>	<b>0%</b>	<b>21%</b>	<b>79%</b>			<b>\$621,289</b>	<b>\$716</b>	<b>21%</b>	<b>3108</b>	<b>78%</b>	<b>3975</b>	<b>\$2,872,800</b>
<b>Total all varieties</b>	<b>10005</b>	<b>3%</b>	<b>5%</b>	<b>70%</b>	<b>18%</b>	<b>4%</b>	<b>\$11,318,463</b>	<b>\$1,131</b>	<b>-23%</b>	<b>26503</b>	<b>73%</b>	<b>36509</b>	<b>\$41,095,452</b>

# Coonawarra

## Historical weighted average price vs tonnes crushed



# Coonawarra

## Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2016
	Pre-2014	2014	2015	2016		
<b>Red winegrapes</b>						
Cabernet Franc	28	0	0	1	29	3%
Cabernet Sauvignon	3,475	129	50	2	3,655	0%
Malbec	18	0	0	0	18	0%
Merlot	362	0	8	1	370	0%
Other Red	7	0	0	0	7	0%
Petit Verdot	18	0	0	0	18	0%
Pinot Noir	42	0	0	0	42	0%
Shiraz	1,145	39	39	0	1,222	0%
<b>Total red varieties</b>	<b>5,094</b>	<b>167</b>	<b>96</b>	<b>3</b>	<b>5,361</b>	<b>0%</b>
<b>White winegrapes</b>						
Chardonnay	273	0	0	0	273	0%
Other White	7	0	0	0	7	0%
Riesling	72	0	0	0	72	0%
Sauvignon Blanc	98	0	0	0	98	0%
Semillon	12	0	0	0	12	0%
Traminer (Gewurztraminer)	2	0	0	0	2	0%
Viognier	2	0	0	0	2	0%
<b>Total white varieties</b>	<b>466</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>466</b>	<b>0%</b>
<b>Total all varieties</b>	<b>5,560</b>	<b>167</b>	<b>96</b>	<b>3</b>	<b>5,827</b>	<b>0%</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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