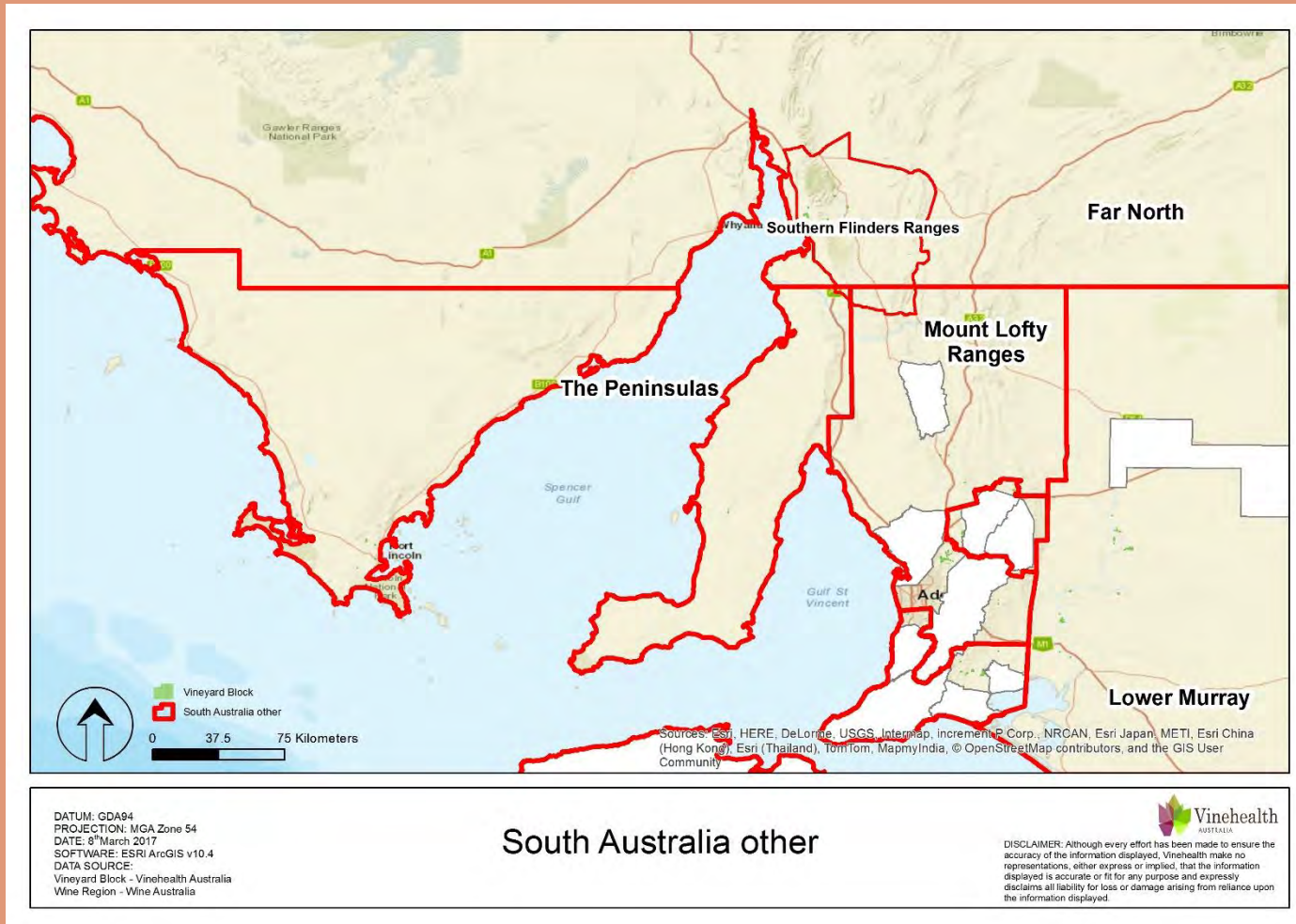


SA Winegrape Crush Survey Regional Summary Report 2018

South Australia - other



SA - other

Vintage overview

South Australia (other) includes the GI region of Southern Flinders Ranges, the Peninsulas zone, and the vineyards in Mount Lofty Ranges (other) and Lower Murray zone (other) – see map on cover page. The total area of vines included in this definition is 1,010 hectares.

OVERVIEW OF VINTAGE STATISTICS

The harvest from South Australia (other) in 2018 was 7,668 tonnes, compared with 6,975 tonnes in 2017. Most of the increase came from Lower Murray zone – other, which was up by 45%.

The five-year average crush for this group of regions is 4,372 tonnes, implying that 2018 yields were significantly up on average. However, apparent changes in small and non-defined areas may be disproportionately affected by changes in the response group and/or adjustments to vineyard location classifications.

The total value of fruit from these vineyards in 2018 is estimated at \$5 million – very similar to 2017. The increased tonnage was offset by an overall decrease of 10% in the average purchase value, mainly driven by Shiraz, which decreased by 8% to \$921 per tonne. On the other hand, Chardonnay was up 5% to \$322 per tonne and Cabernet Sauvignon was up 9% to \$807 per tonne.

The price dispersion data shows that 56% of reds were purchased at \$600 per tonne and above, while all white varieties were purchased at below \$600 per tonne.

There were no new plantings in Mount Lofty Ranges – other, Lower Murray zone – other, Southern Flinders Ranges or the Peninsulas in spring 2017. All these areas are dominated by Shiraz, which makes up 45% of all plantings. The total area has declined from 1,100 hectares in 2013 to 1,010 hectares as at 30 April 2018.

SA - other

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													
Cabernet Sauvignon	1,090		598	425		67	\$880,147	\$807	9%	112	9%	1,202	\$970,498
Grenache	22		18	4						5	17%	27	\$14,655
Mataro/Mourvedre	35				35						0%	35	\$52,290
Merlot	201		201				\$87,497	\$435	-6%	20	9%	221	\$96,199
Montepulciano	5					5					0%	5	\$9,280
Petit Verdot	42			27	15					3	7%	45	\$47,254
Sangiovese	63			63						30	32%	93	\$83,396
Shiraz	2,649		993	1,480	79	97	\$2,438,903	\$921	-8%	385	13%	3,033	\$2,792,998
Tempranillo	4			4							0%	4	\$3,195
Other red	18			18							0%	18	\$13,200
Red total	4,128		1,810	2,021	129	169	\$3,597,335	\$871	-1%	554	12%	4,682	\$4,082,965
White													
Chardonnay	1,450		1,450				\$466,920	\$322	5%	1	0%	1,451	\$467,181
Chenin blanc	21	21									0%	21	\$4,680
Colombard	243	174	69								0%	243	\$59,891
Fiano	75		75								0%	75	\$22,500
Muscat Gordo Blanco	46	46									0%	46	\$11,600
Pinot Gris/Grigio	848		848				\$423,941	\$500			0%	848	\$423,941
Riesling	37		37								0%	37	\$11,172
Sauvignon Blanc	187		187								0%	187	\$73,598
Semillon	69		69								0%	69	\$27,464
Vermentino	8		8								0%	8	\$2,720
Viognier										0	100%	0	\$491
White total	2,985	241	2,743				\$1,104,486	\$370	16%	1	0%	2,986	\$1,105,238
Grand total	7,113	241	4,553	2,021	129	169	\$4,701,821	\$661	-10%	555	7%	7,668	\$5,188,203

Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

SA - other

Current plantings by variety and year planted

	Variety	Year planted				2017 Total area	% planted in 2017
		Pre-2015	2015	2016	2017		
Southern Flinders Ranges	Red winegrapes						
	Cabernet Sauvignon	18	0	0	0	18	0%
	Merlot	6	0	0	0	6	0%
	Shiraz	124	0	0	0	124	0%
	Other red	0	0	0	0	0	0%
	Total red varieties	148	0	0	0	148	0%
	White winegrapes						
	Total white varieties	1	0	0	0	1	0%
	Unknown variety	45	0	0	0	45	0%
	Total all varieties	194	0	0	0	194	0%
The Peninsulas							
	Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
	Cabernet Sauvignon	9	0	0	0	9	0%
	Other red	3	0	0	0	3	0%
	Shiraz	12	0	0	0	12	0%
	Unknown	37	0	0	0	37	0%
Total all varieties	71	0	0	0	71	0%	

Source: Vinehealth Australia

SA - other

Current plantings by variety and year planted

Lower Murray zone - other

Variety	Year planted				2017 Total area	% planted in 2017
	Pre-2015	2015	2016	2017		
Red winegrapes						
Cabernet Sauvignon	72	0	0	0	72	0%
Merlot	18	0	0	0	18	0%
Petit Verdot	16	0	0	0	16	0%
Shiraz	130	3	0	0	133	0%
Other red	16	0	0	0	16	0%
Total red varieties	251	3	0	0	255	0%
White winegrapes						
Chardonnay	84	0	0	0	84	0%
Colombard	14	0	0	0	14	0%
Riesling	10	0	0	0	10	0%
Sauvignon Blanc	12	0	0	0	12	0%
Other white	13	0	0	0	13	0%
Total white varieties	133	0	0	0	133	0%
Unknown variety	29	0	0	0	29	0%
Total all varieties	414	3	0	0	417	0%

Source: Vinehealth Australia

SA - other

Current plantings by variety and year planted

Mount Lofty Ranges zone -
other

Variety	Year planted				2017 Total area	% planted in 2017
	Pre-2015	2015	2016	2017		
Red winegrapes						
Cabernet Sauvignon	74	0	0	0	74	0%
Merlot	6	0	0	0	6	0%
Petit Verdot	6	0	0	0	6	0%
Sangiovese	12	0	0	0	12	0%
Shiraz	186	0	0	0	186	0%
Other red	22	0	0	0	22	0%
Total red varieties	307	0	0	0	307	0%
White winegrapes						
Chardonnay	4	0	0	0	4	0%
Riesling	5	0	0	0	5	0%
Semillon	1	0	0	0	1	0%
Other white	8	0	0	0	8	0%
Total white varieties	19	0	0	0	19	0%
Unknown variety	4	0	0	0	4	0%
Total all varieties	329	0	0	0	329	0%

Source: Vinehealth Australia

Explanations and definitions

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.

Maps and planting data tables are provided by Vinehealth Australia (see notes on planting data tables pg 20).

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

Photo credits

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Image pg 7: Ian Routledge / Wine Australia

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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Explanations and definitions - continued

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 85 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 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 2018).

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.

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 2018 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 and provided for this survey in a deidentified and aggregated manner.

Explanatory notes for planting data tables

Regions are defined according to the Register of Australian Geographical Indications.

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 six, 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 2018 and include all plantings from the 2017 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 2018 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.

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.