



SA Winegrape Crush Survey

Regional Summary Report 2018

Adelaide Plains Wine Region

Wine Australia August 2018

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 2,911 tonnes of Adelaide Plains winegrapes was crushed in 2018, down 17% from 3,496 tonnes in 2017.

The five-year average crush from this region (2013-2017) is 3,843 tonnes, meaning that the 2018 yield overall was 24% below the average and also below the minimum crush over the period which was 3,091 tonnes in 2015. The maximum crush of 4,396 tonnes was recorded in 2016.

The total value of winegrapes declined from just over \$3 million in 2017 to \$2.6 million in 2018 as a result of the lower tonnage. For most varieties the average price paid increased. Shiraz increased by 8% to \$957 per tonne, Merlot by 1% to 742 per tonne and Cabernet Sauvignon by less than 1% to \$951 per tonne.

The price dispersion data shows an upward shift in prices, with 87% of red varieties purchased at between \$600 and \$1500 compared with 95% last year, while 10% were purchased at over \$1500 compared with 3% in 2017. For the whites, 13% were purchased in the lowest price bracket of below \$600 per tonne, which was a higher proportion than in 2017 (9%) but lower than in 2016 (17%) and 2015 (37%).

There were no new plantings in Adelaide Plains in the 2017 planting season. The total area planted as at 30 April 2018 is 472 hectares compared with 477 hectares in 2017 and is 28% lower than it was in 2013 (657 hectares).

Adelaide Plains

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	255			240	15	\$242,166	\$951	0%	7	3%	262	\$248,925	
Grenache	81			81						0%	81	\$56,070	
Mataro/Mourvedre	48			27	21					0%	48	\$51,585	
Merlot	127			127		\$94,503	\$742	1%		0%	127	\$94,503	
Montepulciano	4			4						0%	4	\$4,800	
Pinot Noir	86		51	35						0%	86	\$46,443	
Sangiovese	21			21						0%	21	\$12,624	
Shiraz	1,477			1,297	180	\$1,413,598	\$957	8%		0%	1,477	\$1,413,598	
Tempranillo	8			8						0%	8	\$8,300	
Red total	2,106		51	1,839	216	\$1,930,088	\$916	5%	7	0%	2,114	\$1,936,847	
White													
Chardonnay	251		70	180						0%	251	\$181,303	
Chenin blanc	25		25							0%	25	\$7,605	
Colombard									43	100%	43	\$10,486	
Pinot Gris/Grigio	236			236						0%	236	\$251,525	
Sauvignon Blanc	226			226		\$198,500	\$878			0%	226	\$198,500	
Viognier	16			16						0%	16	\$20,852	
White total	754		96	658		\$659,785	\$875		43	5%	797	\$670,270	
Grand total	2,861		147	2,498	216	\$2,589,873	\$905	5%	50	2%	2,911	\$2,607,117	

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

Adelaide Plains

Current plantings by variety and year planted

Variety	Year planted				Total area	% planted in 2017
	Pre-2015	2015	2016	2017		
Red winegrapes						
Cabernet Sauvignon	53	0	0	0	53	0%
Grenache	28	0	0	0	28	0%
Mataro (Mourvedre)	9	0	0	0	9	0%
Merlot	39	0	0	0	39	0%
Pinot Noir	13	0	0	0	13	0%
Sangiovese	6	0	0	0	6	0%
Shiraz	187	0	0	0	188	0%
Other red	15	0	0	0	15	0%
Total red varieties	349	0	0	0	350	0%
White winegrapes						
Chardonnay	27	0	0	0	27	0%
Pinot Gris	28	0	3	0	31	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	26	0	0	0	26	0%
Semillon	2	0	0	0	2	0%
Other white	15	0	2	0	17	0%
Total white varieties	105	0	4	0	109	0%
Unknown variety	13	0	0	0	13	0%
Total all varieties	467	0	5	0	472	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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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.