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 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

Padthaway Wine Region



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SA Winegrape Crush Survey

Regional Summary Report 2018

Padthaway Wine Region

Wine Australia August 2018

Padthaway

Vintage overview

VINTAGE REPORT

The 2018 harvest progressed under ideal cool and dry conditions. Quality appears to be generally very good even though harvest yields are down on the above average yields of the last two years.

As early as last October 2017, initial bunch counts indicated that yields would be down by 10-15% on the 2017 harvest. When the November 4 frost hit the entire Limestone Coast region, the yields were impacted to varying degrees depending on location and what preventative measures were in place to mitigate the frost's effect. Some yields have been reduced by as little as 10% by the frost whilst some are more significantly affected.

Rainfall through the 2017-18 growing season has been normal, with a dry summer spanning from mid-November to Anzac Day. Disease pressure has been minimal.

The heat wave at the end of January 2018 had little impact in Padthaway because of readily abundant good water supply to maintain proper hydration, and the area's near proximity to the coast about 55 km away "as the crow flies". This ensures generally cool evening temperatures even when daytime temperatures soar.

Many compare Padthaway's climate to Langhorne Creek in the southern area of the Adelaide Hills as well as Heathcote in Victoria. The terroir is ideally suited to Chardonnay and Shiraz varieties that thrive in the region. Many other varieties are grown with many vineyards redeveloping to include increased areas of Cabernet Sauvignon in the well-drained terra-rossa soils over limestone.

John Summers, President, Padthaway Grape Growers' Association

OVERVIEW OF VINTAGE STATISTICS

The harvest from Padthaway in 2018 was 21,277 tonnes, down 48% from the above-average crop of 41,142 tonnes in 2017, and the lowest since 2002.

The five-year average crush for Padthaway from 2013 to 2017 was 33,868 tonnes, making the 2018 harvest 37% below the average. The maximum crush in the past five years was 44,922 tonnes in 2016 and the smallest was 25,351 tonnes in 2015.

The total estimated value of grapes was down from \$36 million in 2017 to \$20 million, with the lower crush partially offset by an overall increase in the average purchase value. All major varieties increased in average purchase value; Chardonnay was up 6% to \$641 per tonne, Shiraz was up 17% to \$1219 per tonne, and Cabernet Sauvignon was up 16% to \$1197 per tonne.

The price dispersion data shows an upward shift in the prices for red varieties, with 5% purchased at \$1500 per tonne or above, compared with just 2% in 2017.

There were 36 hectares of new plantings in Padthaway in spring 2017, with 23 hectares being Shiraz. The total area planted in the region as at 30 April 2018 was 3,896 hectares, a slight increase compared with last year but 170 hectares less than it was in 2013.

Padthaway

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 Franc	18			18					34	65%	53	\$39,465	
Cabernet Sauvignon	2,561			2,541		21	\$3,065,706	\$1,197	16%	31%	3,733	\$4,467,999	
Malbec	113			113					125	52%	238	\$231,967	
Merlot	279			279			\$208,702	\$748	10%	63%	754	\$564,004	
Pinot Noir	546			546					132	19%	678	\$546,299	
Shiraz	3,237		31	2,940	164	102	\$3,946,002	\$1,219	17%	39%	5,292	\$6,451,393	
Tempranillo	18					18				0%	18	\$46,050	
Other red									14	100%	14	\$20,629	
Red total	6,773		31	6,438	164	141	\$7,830,630	\$1,156	16%	4,006	37%	10,780	\$12,367,807
White													
Chardonnay	4,560		1,107	3,453			\$2,921,053	\$641	6%	30%	6,507	\$4,168,443	
Gewurztraminer	156			156					171	52%	327	\$225,347	
Pinot Gris/Grigio	1,464			1,464					312	18%	1,775	\$1,765,358	
Riesling	391		52	339					551	58%	942	\$878,716	
Sauvignon Blanc	615			615			\$507,834	\$825	10%	12%	696	\$574,399	
Verdelho									116	100%	116	\$115,246	
Vermentino									6	100%	6	\$7,350	
Viognier	80			80					38	32%	118	\$118,100	
Other white									11	100%	11	\$16,632	
White total	7,265		1,159	6,106			\$5,436,703	\$748	9%	3,232	31%	10,497	\$7,869,592
Grand total	14,038		1,190	12,544	164	141	\$13,267,332	\$945	10%	7,239	34%	21,277	\$20,237,399

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

Padthaway

Current plantings by variety and year planted

Variety	Year planted				Total area	% planted in 2017
	Pre-2015	2015	2016	2017		
Red winegrapes						
Cabernet Franc	12	0	0	0	12	0%
Cabernet Sauvignon	926	4	6	13	948	1%
Malbec	78	0	0	0	78	0%
Merlot	179	0	0	0	179	0%
Pinot Noir	110	0	0	0	110	0%
Shiraz	1,179	12	8	23	1,223	2%
Other red	8	0	2	0	10	0%
Total red varieties	2,491	15	16	36	2,558	1%
White winegrapes						
Chardonnay	844	0	4	0	847	0%
Pinot Gris	151	0	0	0	151	0%
Riesling	148	0	0	0	148	0%
Sauvignon Blanc	80	0	3	0	83	0%
Verdelho	19	0	0	0	19	0%
Viognier	19	0	0	0	19	0%
Other white	32	0	0	0	32	0%
Total white varieties	1,292	0	6	0	1,298	0%
Unknown variety	40	0	0	0	40	0%
Total all varieties	3,823	15	22	36	3,896	1%

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.