



SA Winegrape Crush Survey

Regional Summary Report 2018

Wrattenbully 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

Wrattenbully Wine Region



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Wrattobully

Vintage overview

VINTAGE REPORT

2018 got off to a great start with ample winter rainfall leading to full soil moisture profiles and leaching of the soil, creeks running, and plenty of aquifer recharge. Budburst occurred on par with long term averages, and ample soil moisture aided very good early shoot growth. Slightly below average temps during August and September were driven by lower maximum temperatures (minimum temp's slightly above average). October temperatures were in general above average due to higher minimum and maximum temperatures.

A late frost event (4th November -1.5°C) caused considerable damage throughout the region.

Average temperatures were near or slightly above long-term averages from November-March. The combination of early soil moisture and slightly warmer condition led to strong and balanced canopy growth and very good fruit set.

A combination of the warmer, dry conditions in January and February along with strong canopies raced the fruit along looking like it may be an early vintage. This was the case with the white varieties as the majority of them were harvested by early March. As cooler conditions returned in March, the ripening of the red varieties slowed and stalled which led to a 3 to 4 week gap in harvesting between the whites and reds. This was very beneficial to the reds as this allowed for them to experience a long slow ripening which then assisted the development of flavours and tannins and allowed them to ripen without the Baumés racing away. Shiraz benefited from the extra week or two of hang time, to allow the flavours to catch up with the early high Baumés. Cabernet Sauvignon again was the stand out with the wines showing very strong varietal characters, colour and balanced tannins.

Tim Fletcher, President, Wrattobully Wine Region

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Wrattobully in 2018 was 13,160 tonnes, 52% down on the 2017 harvest of 27,374 tonnes and the lowest since 2007.

The five-year average crush for Wrattobully from 2013-2017 was 20,918 tonnes. The 2017 crush was the highest in the five year period while the smallest was 16,557 tonnes in 2015. The 2018 crush was 37% below the five-year average.

The total value of grapes decreased from \$28.5 million in 2017 to \$15.6 million in 2018, with the lower tonnages partially offset by significant increases in the average purchase value of all major varieties. Cabernet Sauvignon increased by 12% to \$1379 per tonne, Shiraz increased by 17% to \$1275 per tonne and Merlot increased by 26% to \$1169 per tonne. Chardonnay also increased – up 9% to \$722 per tonne, and Pinot Gris/Grigio increased by 12% to \$1010 per tonne.

The price dispersion data shows that 85% of red tonnages were purchased at between \$600 and \$1500 per tonne and 14% at \$1500 per tonne or higher, which was similar to 2017. For the whites, there was an upward shift, with 91% purchased between \$600 and \$1500 per tonne compared with 77% in 2017, and 9% below \$600 per tonne compared with 23% in 2017.

There were 10 hectares of new plantings in Wrattobully in the 2017 planting season, similar to the two previous years. All were red varieties.

The total planted area in Wrattobully as at 30 April 2018 was 2,680 hectares, almost identical to 2017 and only 7 hectares less than in 2013.

Wrattobully

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									3	100%	3	\$3,802	
Cabernet Sauvignon	2,315			1,964	230	120	\$3,191,591	\$1,379	12%	2,441	51%	4,756	\$6,557,922
Malbec	11			11							0%	11	\$11,360
Merlot	447			329	118		\$522,872	\$1,169	26%	963	68%	1,410	\$1,648,906
Petit Verdot	4			4							61%	11	\$13,548
Pinot Noir	390			390							15%	461	\$412,305
Sangiovese										25	100%	25	\$29,386
Shiraz	1,879		42	1,577	221	39	\$2,395,194	\$1,275	17%	1,524	45%	3,403	\$4,336,926
Tempranillo	50			50							0%	50	\$69,356
Red total	5,096		42	4,326	569	160	\$6,544,613	\$1,284	13%	5,033	50%	10,129	\$13,083,512
White													
Chardonnay	863		113	750			\$622,972	\$722	9%	441	34%	1,304	\$941,616
Gewurztraminer	6			6							0%	6	\$4,620
Pinot Gris/Grigio	191			191			\$192,470	\$1,010	12%	920	83%	1,111	\$1,121,848
Riesling										91	100%	91	\$106,830
Sauvignon Blanc	146			146						277	66%	422	\$278,810
Semillon										25	100%	25	\$22,767
Viognier										71	100%	71	\$89,612
White total	1,205		113	1,092			\$916,118	\$760	10%	1,826	60%	3,030	\$2,566,103
Grand total	6,301		155	5,418	569	160	\$7,460,732	\$1,184	14%	6,859	52%	13,160	\$15,649,615

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

Wrattobully

Current plantings by variety and year planted

Variety	Year planted				2017 Total area	% planted in 2017
	Pre-2015	2015	2016	2017		
Red winegrapes						
Cabernet Sauvignon	1,206	11	0	2	1,220	0%
Malbec	7	0	2	0	8	0%
Merlot	278	0	2	0	280	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	695	0	4	8	707	1%
Tempranillo	9	0	0	0	9	0%
Other red	13	0	0	0	13	0%
Total red varieties	2,271	11	7	10	2,300	0%
White winegrapes						
Chardonnay	190	0	0	0	190	0%
Pinot Gris	98	0	2	0	99	0%
Riesling	7	0	0	0	7	0%
Sauvignon Blanc	61	0	0	0	61	0%
Semillon	5	0	0	0	5	0%
Other white	11	0	0	0	11	0%
Total white varieties	372	0	2	0	373	0%
Unknown variety	6	0	0	0	6	0%
Total all varieties	2,649	11	9	10	2,680	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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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.