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 PROJECTION: MGA Zone 54  
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 SOFTWARE: ESRI ArcGIS v10.4  
 DATA SOURCE:  
 Vineyard Block - Vinehealth Australia  
 Wine Region - Wine Australia

Southern Fleurieu, Kangaroo Island  
 Wine Regions and Fleurieu other



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# SA Winegrape Crush Survey 2019

## Regional Summary Report

### Fleurieu other Inc Southern Fleurieu and Kangaroo Island

*Wine Australia July 2019*

# Fleurieu other

## Vintage overview

*Fleurieu other in this report includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are outside any GI regions in the Fleurieu zone. The total area of vines included in this definition is 850 hectares.*

### OVERVIEW OF VINTAGE STATISTICS

The harvest from the Fleurieu other areas was 3,452 tonnes in 2019, 18 per cent lower than the 4,200 tonnes crushed in 2018 but the second highest since 2015.

There were 31 respondents to the survey who reported crushing grapes from Fleurieu other in 2019, compared with 25 in 2018.

Over the past five years, the average crush across Fleurieu other has been 3,379 tonnes. The 2019 crush was 2 per cent above the average. The minimum crush over the period was 2,869 tonnes in 2014, while the maximum was the 2018 crush.

The total estimated value of grapes from Fleurieu other in 2019 was \$3.3 million, very similar to the \$3.7 million in 2018, as a result of an overall 8 per cent increase in average purchase value partially offsetting the lower tonnage. The average purchase price for Shiraz increased by 13 per cent to \$1171 per tonne, while Chardonnay increased by 19 per cent to \$628 per tonne and Sauvignon Blanc increased by 9 per cent to \$762 per tonne. These increases in the white varieties reversed similar sized decreases last year.

The price dispersion data shows an upward shift in the price dispersion since last year. All red grapes were purchased at \$600 per tonne or above, while for white varieties, 32 per cent were purchased at below \$600 per tonne compared with 37 per cent in 2018.

There have been very few reported new plantings in Southern Fleurieu, Kangaroo Island, or elsewhere in Fleurieu other for the past four years. The total area as at April 30, 2019 is 850 hectares – 2 hectares less than last year, and 120 hectares less than in 2013.

# Fleurieu 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+    |                              |                                |                     |                    |                       |               |                            |
| <b>Red</b>         |                        |   |                 |                  |                   |            |                              |                                |                     |                    |                       |               |                            |
| Cabernet Franc     | 4                      |   |                 |                  |                   | 4          |                              |                                |                     | 0%                 | 4                     | \$9,335       |                            |
| Cabernet Sauvignon | 350                    |   |                 | 322              | 8                 | 21         | \$447,640                    | \$1,279                        | 5%                  | 73                 | 17%                   | 423           | \$540,462                  |
| Grenache           | 23                     |   |                 | 23               |                   |            |                              |                                |                     | 0%                 | 23                    | \$13,614      |                            |
| Malbec             | 1                      |   |                 | 1                |                   |            |                              |                                |                     | 0%                 | 1                     | \$1,180       |                            |
| Merlot             | 138                    |   |                 | 135              | 3                 |            | \$134,094                    | \$975                          |                     | 11                 | 7%                    | 148           | \$144,693                  |
| Pinot Noir         | 113                    |   |                 | 84               | 6                 | 23         | \$185,914                    | \$1,647                        |                     | 3                  | 3%                    | 116           | \$190,854                  |
| Shiraz             | 974                    |   |                 | 920              | 15                | 39         | \$1,140,635                  | \$1,171                        | 13%                 | 58                 | 6%                    | 1,032         | \$1,207,974                |
| Tempranillo        | 15                     |   |                 |                  | 1                 | 15         | \$33,536                     | \$2,233                        |                     |                    | 0%                    | 15            | \$33,536                   |
| <b>Red Total</b>   | <b>1,618</b>           |   |                 | <b>1,484</b>     | <b>32</b>         | <b>102</b> | <b>\$1,965,947</b>           | <b>\$1,215</b>                 | <b>13%</b>          | <b>144</b>         | <b>8%</b>             | <b>1,762</b>  | <b>\$2,141,648</b>         |
| <b>White</b>       |                        |   |                 |                  |                   |            |                              |                                |                     |                    |                       |               |                            |
| Chardonnay         | 578                    |   | 371             | 206              |                   |            | \$362,997                    | \$628                          | 19%                 | 51                 | 8%                    | 629           | \$394,996                  |
| Pinot Gris/Grigio  | 280                    |   |                 | 269              | 11                |            | \$236,681                    | \$845                          |                     | 79                 | 22%                   | 360           | \$303,800                  |
| Prosecco           | 71                     |   |                 | 71               |                   |            |                              |                                |                     | 0%                 | 71                    | \$49,525      |                            |
| Riesling           | 26                     |   | 25              |                  | 1                 |            |                              |                                |                     | 0%                 | 26                    | \$13,320      |                            |
| Sauvignon Blanc    | 415                    |   |                 | 415              |                   |            | \$316,453                    | \$762                          | 9%                  | 104                | 20%                   | 520           | \$395,879                  |
| Semillon           | 52                     |   | 52              |                  |                   |            |                              |                                |                     | 33                 | 39%                   | 85            | \$38,462                   |
| <b>White Total</b> | <b>1,422</b>           |   | <b>449</b>      | <b>961</b>       | <b>12</b>         |            | <b>\$1,002,565</b>           | <b>\$705</b>                   | <b>6%</b>           | <b>268</b>         | <b>16%</b>            | <b>1,690</b>  | <b>\$1,195,981</b>         |
| <b>Grand Total</b> | <b>3,040</b>           |   | <b>449</b>      | <b>2,446</b>     | <b>43</b>         | <b>102</b> | <b>\$2,968,512</b>           | <b>\$976</b>                   | <b>8%</b>           | <b>412</b>         | <b>12%</b>            | <b>3,452</b>  | <b>\$3,337,628</b>         |

*Includes crush from Southern Fleurieu (845 tonnes), Kangaroo Island (64 tonnes) and other Fleurieu (2543 tonnes).*

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

# Fleurieu other

## Current plantings by variety and year planted – Southern Fleurieu

| Variety                       | Year planted |          |          |          | Total area (ha) | % planted in 2018 |
|-------------------------------|--------------|----------|----------|----------|-----------------|-------------------|
|                               | Pre-2016     | 2016     | 2017     | 2018     |                 |                   |
| <b>Red winegrapes</b>         |              |          |          |          |                 |                   |
| Cabernet Sauvignon            | 70           | 0        | 0        | 0        | 70              | 0%                |
| Merlot                        | 35           | 0        | 0        | 0        | 35              | 0%                |
| Pinot Noir                    | 25           | 0        | 0        | 0        | 25              | 0%                |
| Shiraz                        | 116          | 0        | 0        | 0        | 116             | 0%                |
| Other Red                     | 4            | 0        | 0        | 0        | 4               | 0%                |
| <b>TOTAL RED WINEGRAPES</b>   | <b>250</b>   | <b>0</b> | <b>0</b> | <b>0</b> | <b>250</b>      | <b>0%</b>         |
| <b>White winegrapes</b>       |              |          |          |          |                 |                   |
| Chardonnay                    | 85           | 0        | 0        | 0        | 85              | 0%                |
| Pinot Gris/Grigio             | 25           | 0        | 0        | 0        | 25              | 0%                |
| Riesling                      | 3            | 0        | 0        | 0        | 3               | 0%                |
| Sauvignon Blanc               | 58           | 0        | 0        | 0        | 58              | 0%                |
| Semillon                      | 22           | 0        | 0        | 0        | 22              | 0%                |
| Viognier                      | 9            | 0        | 0        | 0        | 9               | 0%                |
| Other White                   | 5            | 0        | 0        | 0        | 5               | 0%                |
| <b>TOTAL WHITE WINEGRAPES</b> | <b>207</b>   | <b>0</b> | <b>0</b> | <b>0</b> | <b>207</b>      | <b>0%</b>         |
| Unknown variety               | 4            | 0        | 0        | 0        | 4               | 0%                |
| <b>TOTAL ALL VARIETIES</b>    | <b>461</b>   | <b>0</b> | <b>0</b> | <b>0</b> | <b>461</b>      | <b>0%</b>         |

Source: Vinehealth Australia

# Fleurieu other

## Current plantings by variety and year planted – Kangaroo Island

| Variety                       | Year planted |          |          |          | Total area (ha) | % planted in 2018 |
|-------------------------------|--------------|----------|----------|----------|-----------------|-------------------|
|                               | Pre-2016     | 2016     | 2017     | 2018     |                 |                   |
| <b>Red winegrapes</b>         |              |          |          |          |                 |                   |
| Cabernet Franc                | 5            | 0        | 0        | 0        | 5               | 0%                |
| Cabernet Sauvignon            | 41           | 0        | 2        | 0        | 43              | 0%                |
| Merlot                        | 4            | 0        | 0        | 0        | 4               | 0%                |
| Shiraz                        | 48           | 0        | 0        | 0        | 48              | 0%                |
| Other Red                     | 8            | 0        | 2        | 0        | 10              | 0%                |
| <b>TOTAL RED WINEGRAPES</b>   | <b>106</b>   | <b>0</b> | <b>4</b> | <b>0</b> | <b>110</b>      | <b>0%</b>         |
| <b>White winegrapes</b>       |              |          |          |          |                 |                   |
| Chardonnay                    | 8            | 0        | 2        | 0        | 10              | 0%                |
| Riesling                      | 3            | 0        | 0        | 0        | 3               | 0%                |
| Sauvignon Blanc               | 9            | 0        | 0        | 0        | 9               | 0%                |
| Other White                   | 5            | 0        | 0        | 0        | 6               | 0%                |
| <b>TOTAL WHITE WINEGRAPES</b> | <b>25</b>    | <b>0</b> | <b>2</b> | <b>0</b> | <b>28</b>       | <b>0%</b>         |
| Unknown variety               | 15           | 0        | 0        | 0        | 15              | 0%                |
| <b>TOTAL ALL VARIETIES</b>    | <b>146</b>   | <b>0</b> | <b>6</b> | <b>0</b> | <b>153</b>      | <b>0%</b>         |

Source: Vinehealth Australia

# Fleurieu other

## Current plantings by variety and year planted – Fleurieu zone (other)

| Variety                       | Year planted |          |          |          | Total area (ha) | % planted in 2018 |
|-------------------------------|--------------|----------|----------|----------|-----------------|-------------------|
|                               | Pre-2016     | 2016     | 2017     | 2018     |                 |                   |
| <b>Red winegrapes</b>         |              |          |          |          |                 |                   |
| Cabernet Sauvignon            | 36           | 0        | 0        | 0        | 36              | 0%                |
| Shiraz                        | 92           | 0        | 0        | 0        | 92              | 0%                |
| Other Red                     | 4            | 0        | 0        | 0        | 4               | 0%                |
| <b>TOTAL RED WINEGRAPES</b>   | <b>132</b>   | <b>0</b> | <b>0</b> | <b>0</b> | <b>132</b>      | <b>0%</b>         |
| <b>White winegrapes</b>       |              |          |          |          |                 |                   |
| Chardonnay                    | 29           | 0        | 0        | 0        | 29              | 0%                |
| Pinot Gris/Grigio             | 16           | 0        | 0        | 0        | 16              | 0%                |
| Sauvignon Blanc               | 13           | 0        | 0        | 0        | 13              | 0%                |
| Other White                   | 6            | 0        | 0        | 4        | 10              | 42%               |
| <b>TOTAL WHITE WINEGRAPES</b> | <b>64</b>    | <b>0</b> | <b>0</b> | <b>4</b> | <b>68</b>       | <b>6%</b>         |
| Unknown variety               | 36           | 0        | 0        | 0        | 36              | 0%                |
| <b>TOTAL ALL VARIETIES</b>    | <b>232</b>   | <b>0</b> | <b>0</b> | <b>4</b> | <b>236</b>      | <b>2%</b>         |

*Plantings in the Fleurieu GI zone that are outside any GI region*

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).

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)

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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.

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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 88 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 2019).

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. However the values are included in the calculation of totals for each 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 Australian National Vintage 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 2019 and include all plantings from the 2018-19 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 current 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.