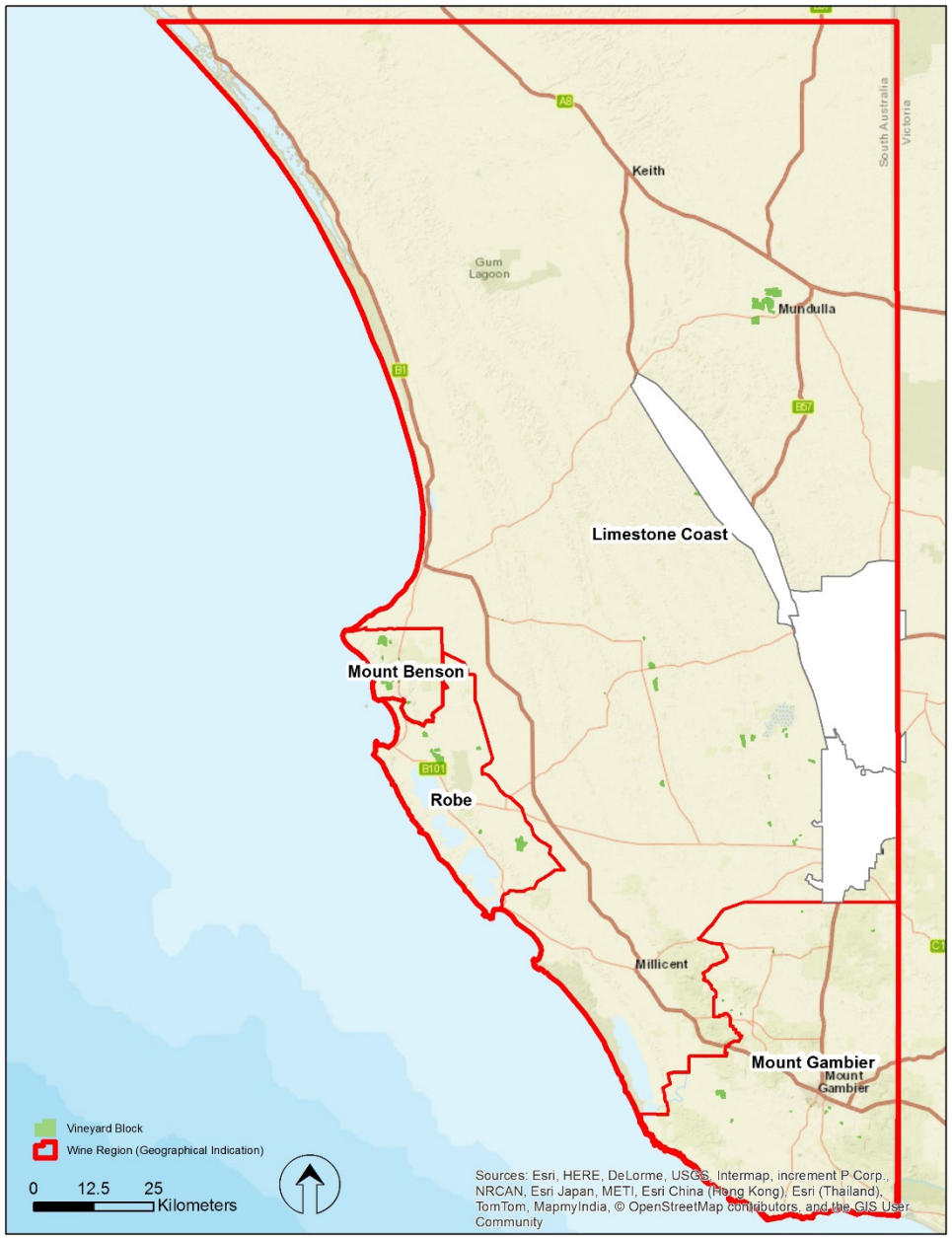

DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Mount Benson, Robe, Mt Gambier, and Limestone Coast other Wine Regions

Vinehealth AUSTRALIA

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SA Winegrape Crush Survey 2019

Regional Summary Report

Limestone Coast other

Wine Australia July 2019

Limestone Coast other

Vintage overview

VINTAGE REPORT – MOUNT BENSON

2019 proved once again how different every vintage is. Two frost events and one day with extreme heat overlay what was otherwise a more traditional vintage for us on the coast.

The season was well founded upon a wet winter with higher than average rainfall but average temperatures. Budburst was later than in recent years with most varieties completing budburst 1-2 weeks later, realigning our harvest timing to our more traditional vintage season. A heavy rainfall event in November affected flowering especially for Pinot Gris, Cabernet Sauvignon and Sauvignon Blanc, with these varieties showing some 'hen-and-chicken'. Temperatures during the summer season were also in line with long term averages; however a heat spike in late January including a record hot day of 41.8˚C assisted to bring the white harvest forward slightly. While the rest of the state battled this heat and lack of water, the cool and more importantly consistent climatic conditions of Mount Benson again reinforced its importance as a premium wine producing region in a changing climate.

Good bright aromatics and vibrancy are once again abundant in whites with great natural acid retention. This natural acid retention translated to the red varieties as well, giving great aging potential to these wines. Flavour and phenolic ripeness in red varieties is appearing to precede the sugar ripeness giving us a much desired lower alcohol vintage.

It has been a challenge for the vignerons this year to fit back into a more traditional vintage with wineries staffing themselves based on the more compressed vintages of recent years. It has been a wonderfully social vintage this year for the winemakers with more time to enjoy a tank sample or two with neighbours while letting the yeasts perform their magic.

Brian Nitschinsk (Mount Benson Estate) and Anita Goode (Wangolina)

Limestone Coast other includes the GI regions of Mount Benson, Mount Gambier and Robe, and the vineyards around Bordertown, Lucindale, and Beachport, as well as those in the Limestone Coast zone but outside the declared GI regions of Padthaway, Coonawarra and Wrattonbully. The total area of vines included in this definition is around 3,332 hectares.

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from the Limestone Coast other group of regions in 2019 was 21,162 tonnes, 28 per cent above the 2018 crush but very similar to the 22,154 tonnes crushed in 2017. The 2019 crush was 29 per cent above the five-year average (2014-2018) of 16,455 tonnes. The largest crush in the five-year period was the 2017 crush, while the lowest was 10,248 tonnes in 2015.

There were 48 respondents to the survey who reported crushing grapes from Limestone Coast other in 2019, compared with 31 in 2018.

The total estimated value of fruit from this area was $21.6 million, 30 per cent above last year's total value of $15.5 million and also above the total value of $17 million in 2017, due to increases in the average prices paid for most varieties.

The average prices of all the major varieties increased: Shiraz by 4 per cent to $1224 per tonne, Cabernet Sauvignon by 3 per cent to $1088 per tonne and Sauvignon Blanc by 4 per cent to $897 per tonne.

The price dispersion data shows quite a narrow band, with 96 per cent of reds and 92 per cent of whites purchased at between $600 and $1500 per tonne.

There were 34 hectares of new plantings (all Cabernet Sauvignon) in Robe and 7 hectares of Shiraz in Mount Benson in the 2018 planting season. Overall, however, the total area included in Limestone Coast other decreased by 14 hectares to 3332 hectares as at 30 April 2019.

Limestone Coast 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 Franc	36			36						287	89%	323	$274,856
Cabernet Sauvignon	1,677			1,648	9	19	$1,824,699	$1,088	3%	3,905	70%	5,581	$6,073,480
Dolcetto	130			130							0%	130	$84,320
Lagrein	2			2							0%	2	$2,845
Malbec	73			73			$69,973	$956		167	69%	240	$229,346
Mataro/Mourvedre	218			218					-100%	124	36%	343	$256,890
Merlot	652			652			$574,652	$882	16%	2,457	79%	3,108	$2,741,134
Montepulciano	7			7							0%	7	$8,880
Petit Verdot	43			43					-100%	245	85%	289	$240,159
Pinot Noir	226		6	220			$262,283	$1,160	9%	390	63%	617	$715,329
Shiraz	2,319			2,149	114	56	$2,839,298	$1,224	4%	3,406	59%	5,725	$7,009,891
Tempranillo	10			10						37	79%	47	$65,226
Red Total	**5,393**		**6**	**5,189**	**123**	**75**	**$5,910,792**	**$1,096**	**5%**	**11,019**	**67%**	**16,412**	**$17,702,355**
White													
Chardonnay	713		60	653			$558,495	$784	21%	2,100	75%	2,812	$2,204,062
Pinot Gris/Grigio	235			235			$233,821	$997	-10%	51	18%	286	$284,894
Prosecco	6				6						0%	6	$9,792
Riesling	14			14							0%	14	$16,800
Sauvignon Blanc	1,077		72	1,004			$966,000	$897	4%	356	25%	1,433	$1,285,252
Semillon	34		3	30			$19,978	$590		143	81%	177	$104,526
Verdelho	22		22								0%	22	$10,935
White Total	**2,100**		**157**	**1,936**	**6**		**$1,815,821**	**$865**	**9%**	**2,650**	**56%**	**4,750**	**$3,916,261**
Grand Total	**7,493**		**163**	**7,125**	**129**	**75**	**$7,726,613**	**$1,031**	**5%**	**13,669**	**65%**	**21,162**	**$21,618,617**

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

Limestone Coast other

Current plantings by variety and year planted – Mount Benson

Variety	Year planted					
	Pre-2016	*2016*	*2017*	*2018*	*Total area*	*% planted in 2018*
Red winegrapes						
Cabernet Sauvignon	114	0	0	0	114	*0%*
Merlot	52	0	0	0	52	*0%*
Pinot Noir	2	0	0	0	2	*0%*
Shiraz	167	4	0	7	178	*4%*
Other Red	3	0	0	0	3	*0%*
TOTAL RED WINEGRAPES	**338**	**4**	**0**	**7**	**349**	**2%**
White winegrapes						
Chardonnay	34	0	0	0	34	*0%*
Pinot Gris/Grigio	43	0	0	0	43	*0%*
Sauvignon Blanc	66	0	0	0	66	*0%*
Other White	11	0	0	0	11	*0%*
TOTAL WHITE WINEGRAPES	**154**	**0**	**0**	**0**	**154**	***0%***
TOTAL ALL VARIETIES	**492**	**4**	**0**	**7**	**503**	**1%**

Source: Vinehealth Australia

Limestone Coast other

Current plantings by variety and year planted – Mount Gambier

Variety	Year planted					
	Pre-2016	*2016*	*2017*	*2018*	*Total area*	*% planted in 2018*
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	*0%*
Merlot	1	0	0	0	1	*0%*
Pinot Noir	79	0	0	0	79	*0%*
Shiraz	0	0	0	0	0	*0%*
Other Red	0	0	0	0	0	*0%*
TOTAL RED WINEGRAPES	**89**	**0**	**0**	**0**	**89**	***0%***
White winegrapes						
Chardonnay	42	0	0	0	42	*0%*
Pinot Gris/Grigio	14	0	0	0	14	*0%*
Riesling	5	0	0	0	5	*0%*
Sauvignon Blanc	97	0	0	0	97	*0%*
Semillon	1	0	0	0	1	*0%*
Other White	1	0	0	0	1	*0%*
TOTAL WHITE WINEGRAPES	**160**	**0**	**0**	**0**	**160**	***0%***
TOTAL ALL VARIETIES	**249**	**0**	**0**	**0**	**249**	***0%***

Source: Vinehealth Australia

Limestone Coast other

Current plantings by variety and year planted - Robe

	Year planted					
Variety	*Pre-2016*	*2016*	*2017*	*2018*	*Total area*	*% planted in 2018*
Red winegrapes						
Cabernet Sauvignon	221	0	0	34	255	*13%*
Merlot	50	0	0	0	50	*0%*
Pinot Noir	46	0	0	0	46	*0%*
Shiraz	171	0	0	0	171	*0%*
Other Red	5	0	0	0	5	*0%*
TOTAL RED WINEGRAPES	**493**	**0**	**0**	**34**	**527**	**6%**
White winegrapes						
Chardonnay	76	0	0	0	76	*0%*
Pinot Gris/Grigio	15	0	0	0	15	*0%*
Sauvignon Blanc	32	0	0	0	32	*0%*
Semillon	12	0	0	0	12	*0%*
TOTAL WHITE WINEGRAPES	**135**	**0**	**0**	**0**	**135**	***0%***
Unknown variety	76	0	0	0	76	*0%*
TOTAL ALL VARIETIES	**704**	**0**	**0**	**34**	**738**	**5%**

Source: Vinehealth Australia

Limestone Coast other

Current plantings by variety and year planted - Bordertown

Variety	*Pre-2016*	*2016*	*2017*	*2018*	*Total area*	*% planted in 2018*
Red winegrapes						
Cabernet Sauvignon	415	0	0	0	415	*0%*
Merlot	219	0	0	0	219	*0%*
Petit Verdot	43	0	0	0	43	*0%*
Shiraz	337	0	0	0	337	*0%*
Other Red	112	0	0	0	112	*0%*
TOTAL RED WINEGRAPES	1,126	0	0	0	1,126	0%
White winegrapes						
Chardonnay	88	0	0	0	88	*0%*
Pinot Gris	12	0	0	0	12	*0%*
Sauvignon Blanc	8	0	0	0	8	*0%*
Semillon	7	0	0	0	7	*0%*
Other White	11	0	0	0	11	*0%*
TOTAL WHITE WINEGRAPES	126	0	0	0	126	0%
TOTAL ALL VARIETIES	1,252	0	0	0	1,252	0%

Source: Vinehealth Australia

Limestone Coast other

Current plantings by variety and year planted – Limestone Coast zone other

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	*2016*	*2017*	*2018*		
Red winegrapes						
Cabernet Sauvignon	337	0	0	0	337	*0%*
Merlot	45	0	0	0	45	*0%*
Pinot Noir	10	0	0	0	10	*0%*
Shiraz	136	0	0	0	136	*0%*
Other red	5	0	0	0	5	*0%*
TOTAL RED WINEGRAPES	**533**	**0**	**0**	**0**	**533**	***0%***
White winegrapes						
Chardonnay	41	0	0	0	41	*0%*
Pinot Gris/Grigio	1	0	0	0	1	*0%*
Riesling	4	0	0	0	4	*0%*
Sauvignon Blanc	9	0	0	0	9	*0%*
Other white	2	0	0	0	2	*0%*
TOTAL WHITE WINEGRAPES	**57**	**0**	**0**	**0**	**57**	***0%***
TOTAL ALL VARIETIES	**590**	**0**	**0**	**0**	**590**	***0%***

Plantings in the Limestone Coast 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 pg 10).

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:

Wine Australia Market Insights
+618 8228 2000
Market.insights@wineaustralia.com

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 receival – 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 2019 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.

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- 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 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.