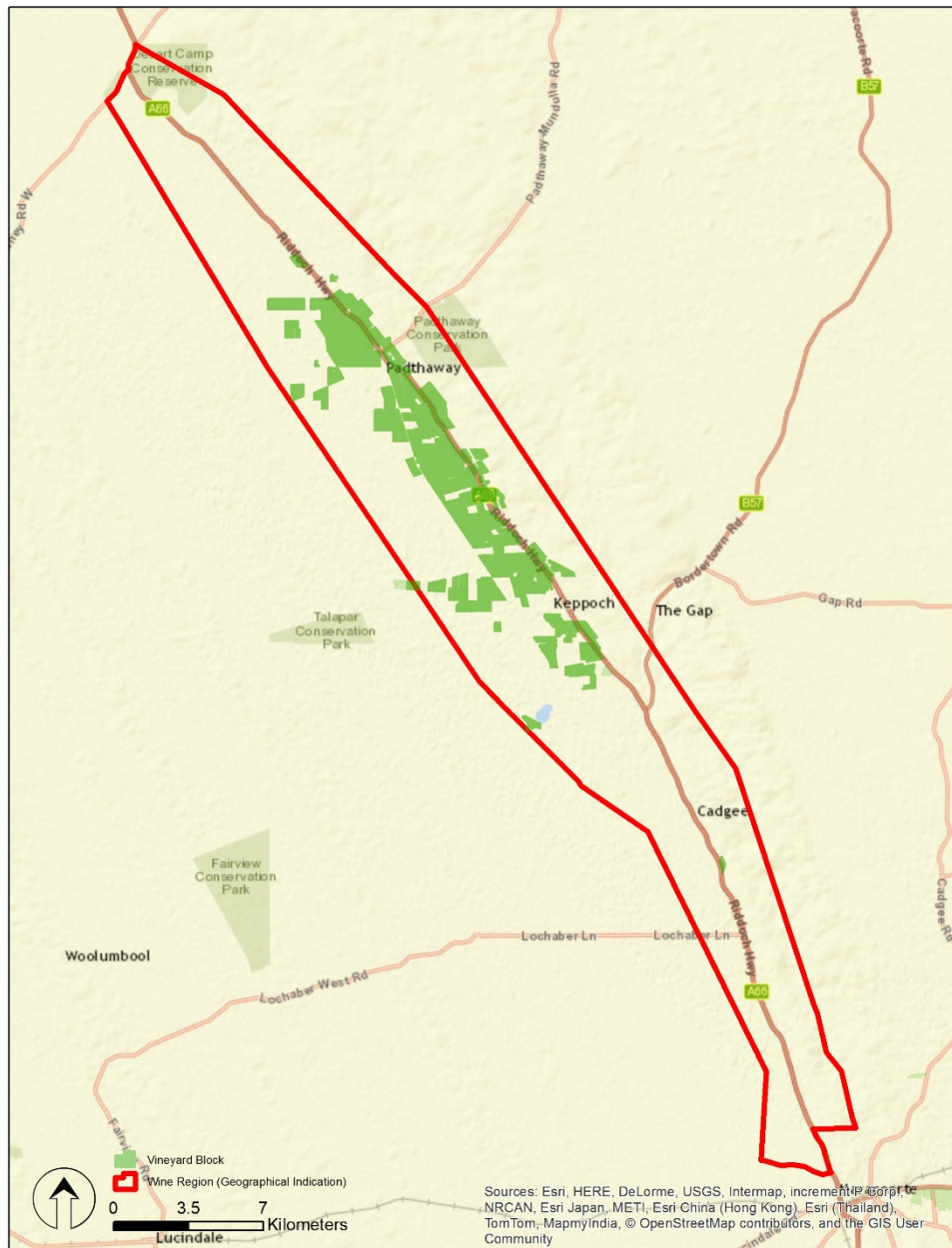


SA Winegrape Crush Survey 2019

Regional Summary Report

Padthaway Wine Region

Wine Australia July 2019



Sources: Esri, HERE, DeLorme, USGS, Intermap, increment P Corp., GEBCO, NRCAN, Esri Japan, METI, Esri China (Hong Kong), Esri (Thailand), TomTom, MapmyIndia, © OpenStreetMap contributors, and the GIS User Community

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

Padthaway Wine Region



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Padthaway

Vintage overview

VINTAGE REPORT

Harvest in Padthaway ended between Easter and Anzac Day. Some have made a start on machine pruning where there has been enough leaf fall to do so.

For Padthaway wine grape growers, it has been a rewarding vintage.

Above average rainfall leading up to Christmas made mildew control tricky early; however no issues from that point on made the back half of the season easy to manage with no disease pressure at all and with hardly any frost damage.

A heat spike had some short term impact in unbalancing grape ripening (North - South rows more so than East - West and early varieties more than late) for a short while, but in the main vignerons were well prepared with hydration and canopies to safeguard themselves along with Padthaway's reliable maritime-based cool evening relief. A mild extended ripening period followed right through to harvest and grape quality was high with tonnage average overall. It is apparent that much of Padthaway's grape harvest is destined for high quality wine production.

Cabernet Sauvignon exhibited some yield variation and there was some isolated fruit set issue in Chardonnay and Cabernet Sauvignon, mostly on lighter nutrition soils with perhaps up to 10% loss in some areas.

Overall, grape quality was high and yield average.

Demand for fruit has been high across all varieties and prices have been strong as Padthaway's reliability as a consistent producer of quality wine grapes spreads along with recognition of its proven and sustainable ground water source underpinning local production.

John Summers, President, Padthaway Grape Growers Association

OVERVIEW OF VINTAGE STATISTICS

The harvest from Padthaway in 2019 was 37,215 tonnes, up by 75 per cent compared with the very low 2018 crop of 21,277 tonnes.

Padthaway overtook the Clare Valley, Adelaide Hills and McLaren Vale to record the fifth largest crush of all South Australian regions.

The five-year average crush for Padthaway from 2014 to 2018 is 32,075 tonnes, making the 2019 harvest 16 per cent above the average. The maximum crush in the past five years was 44,922 tonnes in 2016 and the smallest was the 2018 crush.

There were 17 respondents to the survey who reported crushing grapes from Padthaway in 2019, compared with 13 in 2018.

The total estimated value of grapes was up from \$20 million in 2018 to \$38.5 million, with the higher crush enhanced by an overall 10 per cent increase in the average purchase value. All major varieties increased in average purchase value; Chardonnay was up 2 per cent to \$655 per tonne, Shiraz was up 10 per cent to \$1341 per tonne, and Cabernet Sauvignon was up 7 per cent to \$1286 per tonne.

The price dispersion data shows an upward shift in the prices for red varieties, with 9 per cent purchased at \$1500 per tonne or above, compared with 5 per cent in 2018 and just 2 per cent in 2017.

There were just 8 hectares of new plantings in Padthaway in spring 2018, all Shiraz. The total area planted in the region as at 30 April 2019 was 3,881 hectares, a slight decrease compared with last year and 185 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	23			23					87	79%	110	\$110,150	
Cabernet Sauvignon	4,483			4,115	221	147	\$5,766,752	\$1,286	7%	2,329	34%	6,812	\$8,763,469
Lagrein	32				32					0%	32	\$47,580	
Malbec	202			202					982	83%	1,184	\$1,211,599	
Merlot	826			826			\$662,629	\$802	7%	1,351	62%	2,177	\$1,746,266
Pinot Noir	1,202			1,202			\$1,022,970	\$851		104	8%	1,306	\$1,111,476
Sangiovese	35				35					0%	35	\$52,680	
Shiraz	6,520			5,740	379	400	\$8,742,639	\$1,341	10%	3,682	36%	10,201	\$13,680,030
Tempranillo	30					30				3	10%	33	\$82,625
Red Total	13,352			12,109	666	577	\$16,599,584	\$1,243	8%	8,538	39%	21,890	\$26,805,875
White													
Chardonnay	5,954		1,136	4,818			\$3,902,669	\$655	2%	3,236	35%	9,190	\$6,023,542
Gewurztraminer	175			175						169	49%	343	\$236,974
Pinot Gris/Grigio	1,865			1,865			\$1,783,134	\$956		423	18%	2,288	\$2,187,612
Riesling	332			332						1,640	83%	1,972	\$1,971,720
Sauvignon Blanc	1,052			1,052			\$858,448	\$816	-1%	112	10%	1,164	\$949,998
Verdelho										147	100%	147	\$143,010
Vermentino	24			24						89	79%	112	\$89,792
Viognier	70			70						24	25%	94	\$93,950
Other white										15	100%	15	\$22,157
White Total	9,471		1,136	8,335			\$7,085,776	\$748	0%	5,854	38%	15,325	\$11,718,754
Grand Total	22,823		1,136	20,444	666	577	\$23,685,360	\$1,038	10%	14,392	39%	37,215	\$38,524,629

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 (ha)	% planted in 2018
	Pre-2016	2016	2017	2018		
Red winegrapes						
Cabernet Franc	12	0	0	0	12	0%
Cabernet Sauvignon	922	6	68	0	995	0%
Malbec	78	0	0	0	78	0%
Merlot	172	0	0	0	172	0%
Pinot Noir	90	0	0	0	90	0%
Shiraz	1,162	8	31	8	1,210	1%
Other Red	8	2	0	0	10	0%
TOTAL RED WINEGRAPES	2,444	16	99	8	2,567	0%
White winegrapes						
Chardonnay	816	4	0	0	820	0%
Pinot Gris	157	2	0	0	159	0%
Riesling	148	0	0	0	148	0%
Sauvignon Blanc	80	3	0	0	83	0%
Verdelho	19	0	0	0	19	0%
Viognier	19	0	0	0	19	0%
Other White	28	0	0	0	28	0%
TOTAL WHITE WINEGRAPES	1,267	9	0	0	1,276	0%
Unknown variety	38	0	0	0	38	0%
TOTAL ALL VARIETIES	3,749	25	99	8	3,881	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).

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:

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 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.