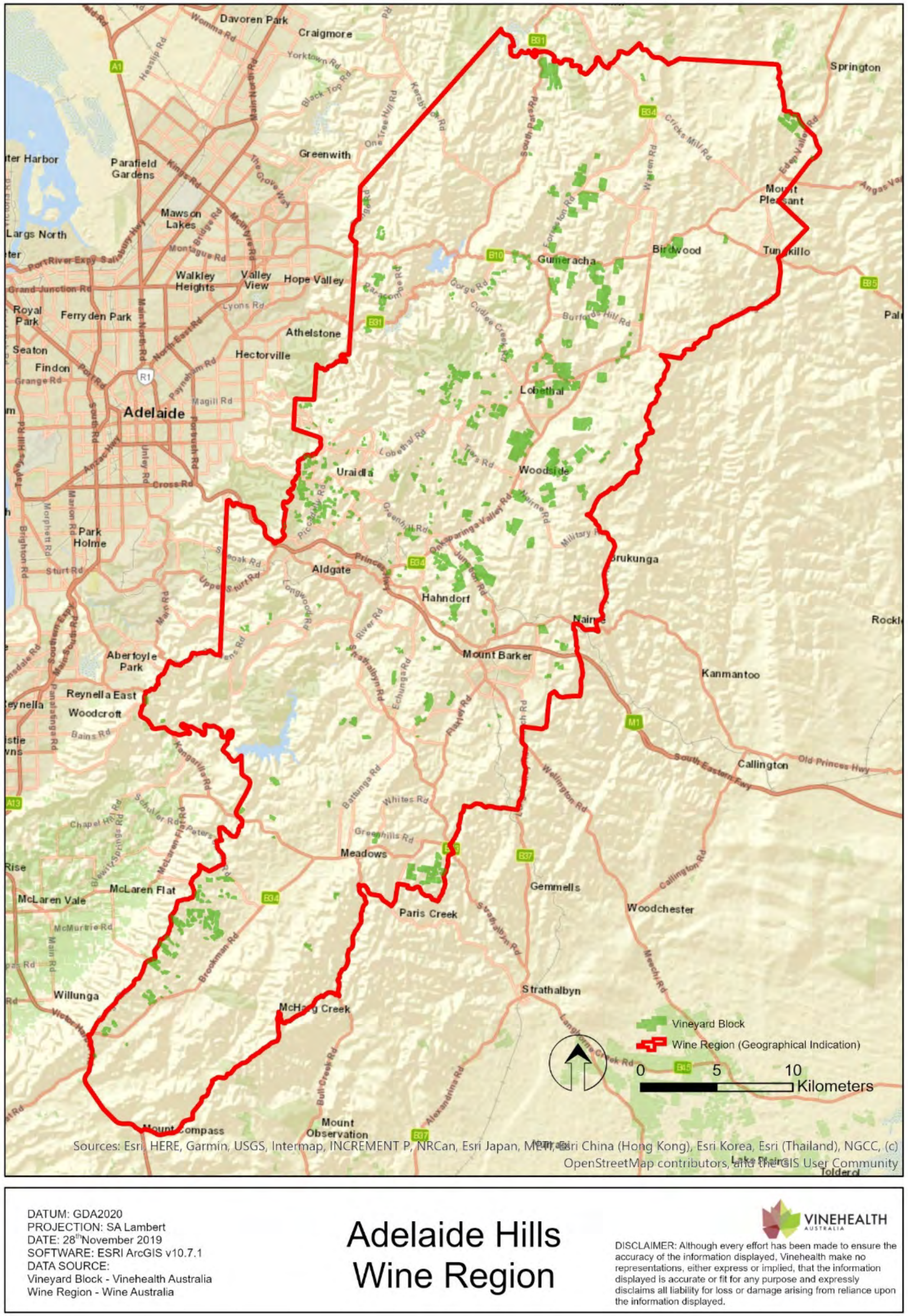

SA Winegrape Crush Survey 2022

Regional Summary Report

Adelaide Hills Wine Region

Wine Australia July 2022

Adelaide Hills

Vintage overview

VINTAGE REPORT

Vintage 2022 was welcomed for its long cool ripening and the absence of serious consequences from the forecast La Niña influence. Although crop loads were down on those harvested in 2021, they were generally close to average and ripened well with the benefit of good-sized canopies.

Full soil moisture profiles and mild and dry conditions in September encouraged an even budburst across the region. However, cool to cold temperatures though October (lowest average maximum for October for this millennium) and November delayed flowering and fruit set. Cool conditions affected pollen tube development in early flowering varieties resulting in poor set (hen and chicken) particularly in Pinot Noir and some Chardonnay crops. Wet conditions in mid-November raised concerns for the potential for downy mildew and Botrytis, particularly as the forecast for La Niña was ongoing.

Temperatures in the summer months were just below average and there were only 5 days over 35°C and none above 40°C for both Summer and Autumn. Rainfall in late January caused ongoing concerns for the small numbers of growers with lingering downy mildew control issues but was otherwise welcome as it was the last significant rainfall before harvest. Conditions during vintage were mild and dry and cool nights enhanced flavour development. The unseasonably cool Spring conditions resulted in harvest being later than usual and the last of the red grape harvest lingered into May.

Growers and Winemakers alike were pleased that the La Niña forecast did not come to fruition. The clean and full-flavoured harvest should enhance the Adelaide Hills Wine Region cool climate reputation.

Richard Hamilton, Hamilton Viticulture Pty Ltd
On behalf of Adelaide Hills Wine Region Inc.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Adelaide Hills winegrapes in 2022 was 20,327 tonnes, down by 32 per cent compared with the 2021 near-record crush of 30,047 tonnes. Over the past five years (up to 2021), the average crush for the Adelaide Hills has been 22,557 tonnes, making this year’s crush 10 per cent below the five-year average.

There were 94 respondents to the survey who reported crushing grapes from the Adelaide Hills in 2022, compared with 104 in 2021.

The total value of winegrapes in 2022 decreased by $13 million (25 per cent) to $39 million, with the decreased production partly offset by an increase in the average purchase value of grapes, which was up by 12 per cent from $1718 to $1928 per tonne.

There were increases in average prices for the three largest varieties: Pinot Noir up by 11 per cent to $2221 per tonne, Sauvignon Blanc up 17 per cent to $1773 per tonne and Chardonnay up by 14 per cent to $2036 per tonne.

The price dispersion data shows an upward shift in prices paid, with 37 per cent of all grapes being purchased at $2000 per tonne or above compared with 24 per cent in 2021.

There were 23 hectares of new vines planted in the region in the 2021–22 season compared with 30 hectares in the previous season. Just under half of the new plantings were Pinot Noir (10 hectares).

The total vineyard area in the Adelaide Hills as at 30 April 2022 was 3707 hectares – a small net reduction (18 hectares) since 2021 and 141 hectares less than the total area five years ago.

Adelaide Hills

Winegrape intake summary table – red winegrapes

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Barbera	17	$39,757	$2,328	3%	14	45%	31	$72,662
Cabernet Franc	3				32	92%	35	$57,121
Cabernet Sauvignon	410	$655,576	$1,600	4%	302	42%	712	$1,139,238
Durif					8	100%	8	$10,652
Grenache	4						4	$8,816
Malbec	5						5	$9,467
Mataro/Mourvedre					3	100%	3	$5,124
Merlot	329	$341,690	$1,041	9%	48	13%	377	$391,685
Montepulciano	21	$44,876	$2,180	4%			21	$44,876
Nebbiolo	14	$34,136	$2,379	16%	37	72%	52	$122,728
Nero d'Avola	10	$21,657	$2,127	0%			10	$21,657
Pinot Meunier	92	$198,555	$2,156	9%			92	$198,555
Pinot Noir	2,797	$6,211,689	$2,221	11%	578	17%	3,375	$7,495,493
Sangiovese	35	$67,855	$1,948	-1%	6	15%	41	$79,609
Shiraz	736	$1,371,183	$1,875	-7%	715	49%	1,451	$2,711,707
Tempranillo	88	$183,182	$2,076	9%	44	33%	132	$273,890
Other red	53	$131,583	$2,460	22%	44	45%	97	$200,052
Red Total	**4,615**	**$9,324,808**	**$2,022**	**9%**	**1,831**	**28%**	**6,446**	**$12,843,333**

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

Adelaide Hills

Winegrape intake summary table – white winegrapes

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
White								
Chardonnay	4,196	$8,541,540	$2,036	14%	931	18%	5,128	$10,437,430
Chenin blanc	2						2	$3,968
Fiano	13	$26,566	$2,042	0%	3	16%	16	$31,672
Gewürztraminer	47	$92,573	$1,965	64%	1	1%	48	$93,732
Grüner Veltliner	64	$146,212	$2,286	16%	87	57%	151	$344,660
Muscat à Petits Grains Blancs	5						5	$3,042
Pinot Gris/Grigio	1,095	$2,008,675	$1,835	10%	397	27%	1,492	$2,737,649
Prosecco	26	$30,628	$1,188	0%	25	50%	51	$60,818
Riesling	207	$369,817	$1,787	13%	47	19%	254	$453,954
Sauvignon Blanc	4,677	$8,294,298	$1,773	17%	1,810	28%	6,487	$11,504,594
Semillon	70	$121,740	$1,744	34%	28	29%	98	$171,141
Vermentino	9						9	$11,076
Viognier	15	$22,738	$1,470	22%	14	48%	30	$43,840
Other white	28	$50,830	$1,811	2%	82	74%	110	$232,438
White Total	**10,455**	**$19,723,703**	**$1,887**	**15%**	**3,426**	**25%**	**13,881**	**$26,130,013**
Grand Total	**15,070**	**$29,048,510**	**$1,928**	**12%**	**5,257**	**26%**	**20,327**	**$38,973,346**

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

Adelaide Hills

Historical weighted average price vs tonnes crushed

Adelaide Hills

Price dispersion – purchased grapes (red)

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Barbera					17	17
Cabernet Franc				3		3
Cabernet Sauvignon	42	8	46	219	95	410
Grenache					4	4
Malbec				5	0	5
Merlot		10	293	20	6	329
Montepulciano					21	21
Nebbiolo					14	14
Nero d'Avola					10	10
Pinot Meunier				9	83	92
Pinot Noir			37	827	1,933	2,797
Sangiovese				17	18	35
Shiraz		31	104	304	298	736
Tempranillo				30	58	88
Other red				8	45	53
Red total	**42**	**48**	**481**	**1,442**	**2,602**	**4,615**

Adelaide Hills

Price dispersion – purchased grapes (white)

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
White						
Chardonnay			43	2,563	1,590	4,196
Chenin blanc				2		2
Fiano				5	8	13
Gewürztraminer				27	20	47
Grüner Veltliner				10	54	64
Muscat à Petits Grains Blancs		5				5
Pinot Gris/Grigio			16	803	276	1,095
Prosecco			26			26
Riesling			70	52	85	207
Sauvignon Blanc			425	3,406	847	4,677
Semillon			21	12	37	70
Vermentino			9			9
Viognier			6	9		15
Other white				21	7	28
White total		**5**	**616**	**6,911**	**2,923**	**10,455**
Total purchased	**42**	**53**	**1,097**	**8,353**	**5,525**	**15,070**

Adelaide Hills

Current plantings by variety and year planted

Variety	Area (hectares) Pre-2019	2019	2020	2021	Total area (Ha)	% planted in 2021
Red winegrapes						
Barbera	6	0	0	0	6	0%
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	200	0	0	0	200	0%
Dolcetto	2	0	0	0	2	0%
Gamay	4	2	1	3	10	30%
Grenache	2	0	0	1	3	33%
Malbec	2	0	1	0	3	0%
Merlot	126	0	0	0	126	0%
Meunier (Pinot Meunier)	22	0	0	0	22	0%
Montepulciano	5	0	0	0	5	0%
Nebbiolo	13	1	0	0	14	2%
Nero d'Avola	3	0	0	0	3	0%
Pinot Noir	647	7	33	10	697	1%
Sangiovese	15	0	0	0	15	0%
Shiraz	388	5	3	2	398	1%
Tempranillo	34	0	0	0	34	0%
Other Red	17	0	0	0	17	0%
Total red varieties	**1,492**	**15**	**38**	**16**	**1,561**	**1%**
White winegrapes						
Arneis	7	0	0	0	7	0%
Chardonnay	809	4	9	2	824	0%
Fiano	9	0	0	0	9	0%
Gruner Veltliner	20	0	0	1	21	5%
Muscat Gordo Blanco	1	0	0	0	1	0%
Pinot Gris	251	0	2	0	253	0%
Prosecco	5	0	0	0	5	0%
Riesling	46	0	1	3	50	6%
Sauvignon Blanc	850	1	1	1	853	0%
Savagnin	5	1	0	0	6	0%
Semillon	30	0	0	0	30	0%
Traminer (Gewurztraminer)	13	0	2	0	15	0%
Viognier	15	0	0	0	15	0%
Other White	14	1	0	0	15	0%
Total white varieties	**2,075**	**7**	**15**	**7**	**2,104**	**0%**
Rootstock Block	2	0	0	0	2	0%
Unknown variety	40	0	0	0	40	0%
Total all varieties	**3,609**	**22**	**53**	**23**	**3,707**	**0%**

Source: Vinehealth Australia

Explanations and definitions

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 89 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 specific amounts paid for 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 2022).

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 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.

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.

Explanatory notes for planting data tables

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 seven, 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 2022 and include all plantings from the 2021–22 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 top-worked, 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.

Acknowledgements

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.

The survey publication is available on 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 www.winesa.asn.au.

Survey results from 2015 onwards are available on the Wine Australia interactive Vintage Survey Dashboard:
https://marketexplorer.wineaustralia.com/vintage-survey

About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), growing domestic and international markets, protecting the reputation of Australian wine.

Wine Australia is an Australian Commonwealth Government statutory authority, established under the *Wine Australia Act 2013*, and funded by grape growers and winemakers through levies and user-pays charges and the Australian Government, which provides matching funding for RDA investments.

Credits

Images – Wine Australia
GI maps – Vinehealth Australia

Disclaimer

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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