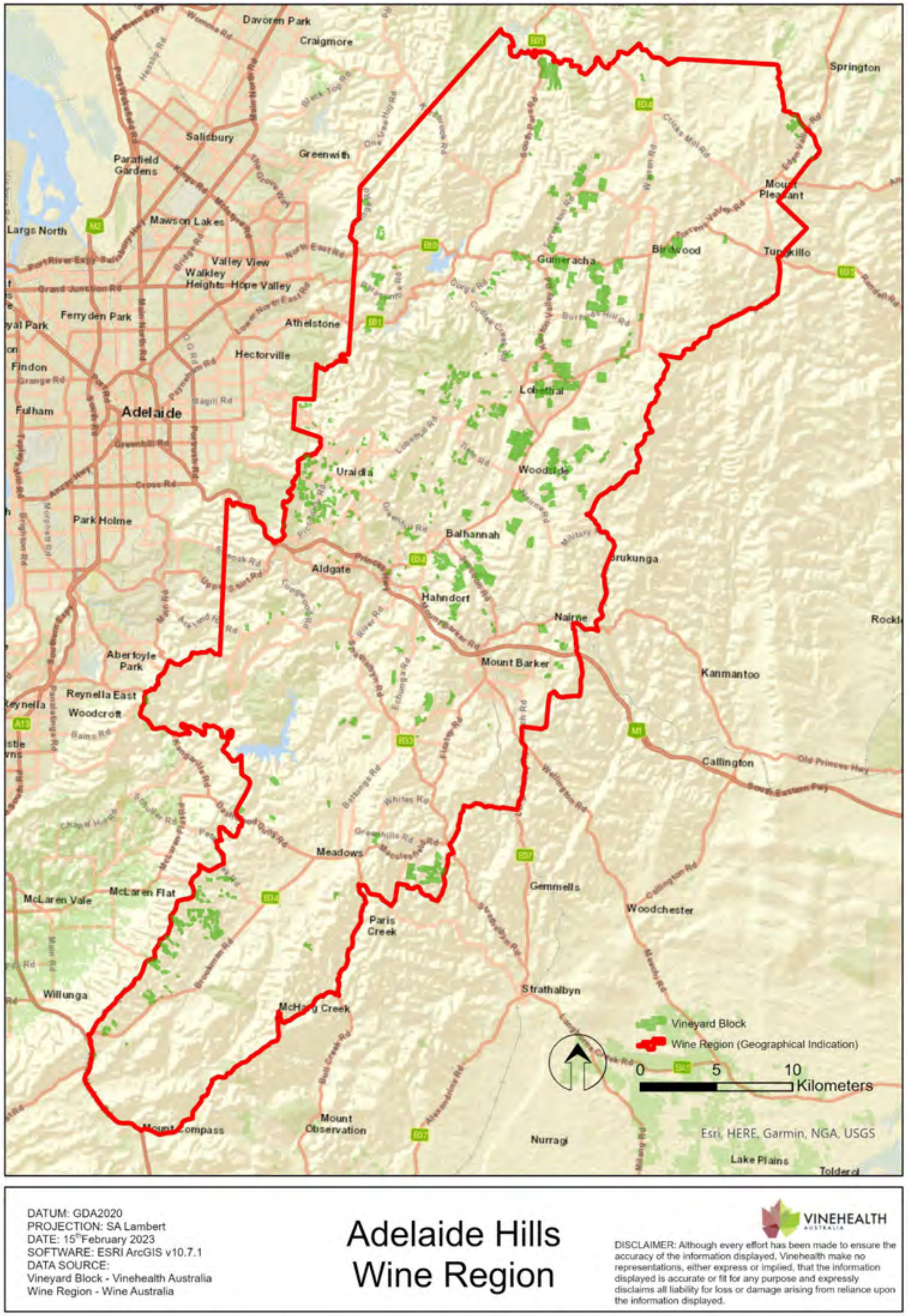


SA Winegrape Crush Survey 2023

Regional Summary Report

Adelaide Hills Wine Region

Wine Australia July 2023

Adelaide Hills

Vintage overview

VINTAGE REPORT

The vagaries of the 2022/2023 growing season will be long remembered by grape growers. Winter rainfall was close to average and the season began with full soil moisture profiles. Despite an unusually dry July, rainfall in June and August meant that access to vineyards was difficult early in the season, particularly in low-lying and steep sections. A wet October and very wet November (275% of the November Long-Term Average [LTA] rainfall for Lenswood) combined to make vineyard access extremely difficult, particularly for disease management. Shoot growth and development of flowers was slowed by cold as well as wet conditions which persisted into early December. Fortunately, conditions improved just after flowering commenced. A welcome break in the adverse weather reduced the risk of diseases but impacted on fruit set and crop levels, particularly in early flowering varieties.

The remainder of the growing season was relatively dry (at LTA levels) meaning that concerns over disease control were greatly reduced. Grape canopies were able to reach full size as they kept growing into early January. Good-sized canopies, a smaller than average crop together with a warm February enhanced early ripening. However, cooler than average conditions in March and April slowed ripening considerably with the latest crops having to hang into late April to May to reach target sugar levels.

Below average crop loads and a long cool ripening meant that the harvest period was one of the latest since the 1990s and early 2000s. These autumn conditions resulted in wines which will maintain the high quality for which the Adelaide Hills is renowned.

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 2023 was 18,125 tonnes, down by 12 per cent compared with the prior year's crush. Over the past five years (up to 2022), the average crush for the Adelaide Hills has been 21,188 tonnes, making this year's crush also 12 per cent below the five-year average.

There were 83 respondents to the survey who reported crushing grapes from the Adelaide Hills in 2023, compared with 95 in 2022.

The total value of winegrapes in 2023 was $39 million, the same as last year, with the decreased production partly offset by an increase in the average purchase value of grapes, which was up by 14 per cent from $1928 to $2189 per tonne.

There were increases in average prices for the three largest varieties: Sauvignon Blanc up by 12 per cent to $1988 per tonne, Chardonnay up by 13 per cent to $2290 per tonne and Pinot Noir up by 15 per cent to $2544 per tonne.

The price dispersion data shows an upward shift in prices paid, with 67 per cent of all grapes being purchased at $2000 per tonne or above compared with 37 per cent in 2022.

There were 41 hectares of new vines planted in the region in the 2022–23 season compared with 23 hectares in the previous season. A quarter of the new plantings were Pinot Noir (10 hectares).

The total vineyard area in the Adelaide Hills as at 30 April 2023 was 3708 hectares – almost identical to 2022, and 122 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	26	$68,880	$2,695	16%	9	25%	34	$92,277
Cabernet Franc					5	100%	5	$7,039
Cabernet Sauvignon	296	$381,381	$1,289	-19%	46	13%	342	$440,531
Durif					4	100%	4	$3,856
Graciano	0						0	$1,152
Grenache	6						6	$11,348
Malbec	0						0	$306
Mataro/Mourvedre					2	100%	2	$3,976
Merlot	250	$245,117	$982	-6%	12	4%	261	$256,443
Montepulciano	26	$57,190	$2,217	2%			26	$57,190
Nebbiolo	15	$34,339	$2,242	-6%	25	62%	40	$89,675
Nero d'Avola	12						12	$18,328
Pinot Meunier	102	$263,645	$2,584	20%			102	$263,645
Pinot Noir	3,361	$8,551,554	$2,544	15%	786	19%	4,147	$10,551,784
Sangiovese	43	$84,636	$1,955	0%			43	$84,636
Shiraz	424	$776,990	$1,834	-2%	369	47%	793	$1,453,420
Tempranillo	100	$225,954	$2,268	9%	24	19%	123	$279,632
Other red	78	$201,508	$2,596	6%	19	20%	97	$251,838
Red Total	**4,737**	**$10,922,327**	**$2,306**	**14%**	**1,300**	**22%**	**6,037**	**$13,867,075**

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

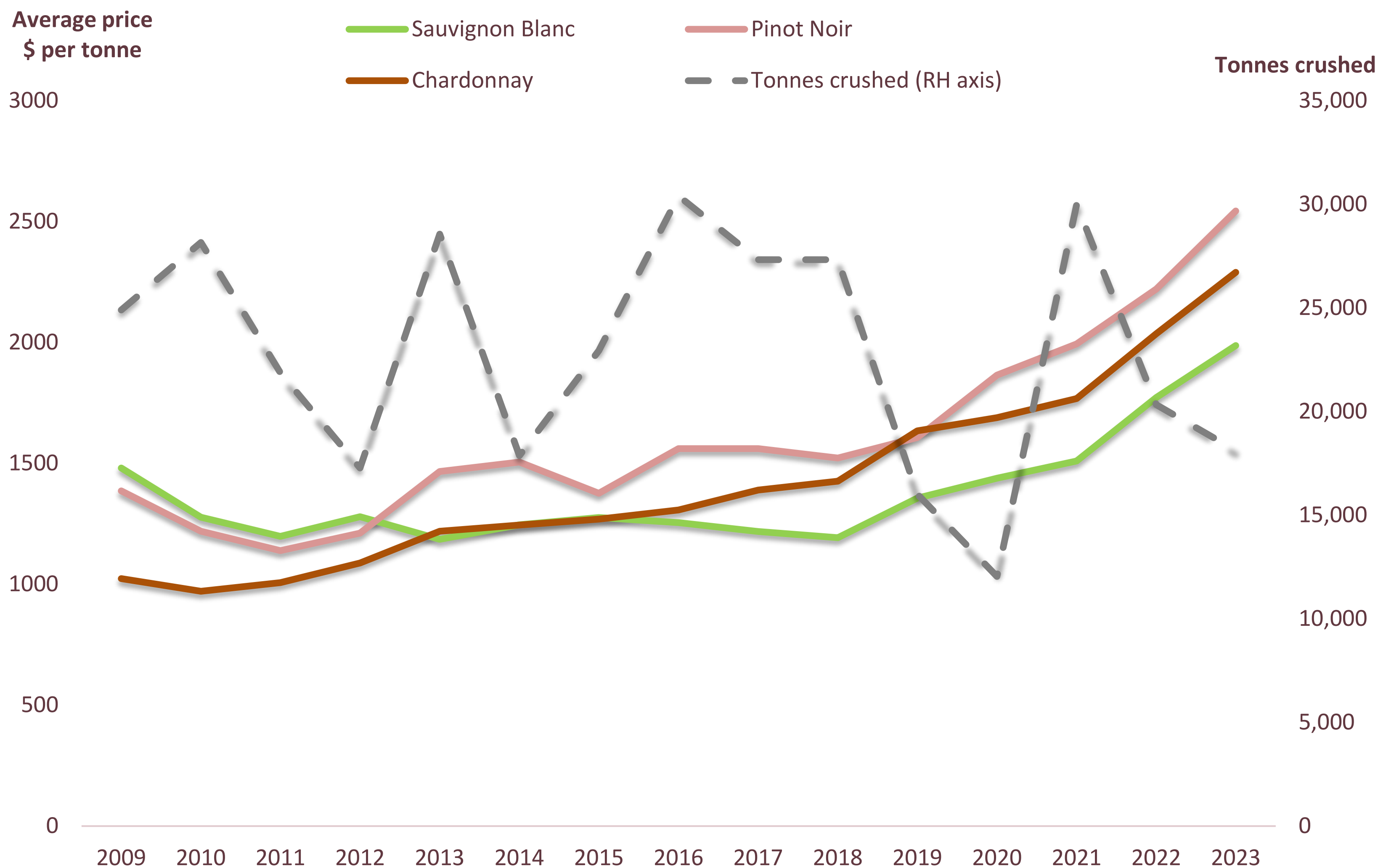
Winegrape intake summary table – white winegrapes

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	3,608	$8,265,374	$2,290	13%	855	19%	4,462	$10,223,016
Fiano	9				5	37%	14	$30,536
Gewürztraminer	39	$79,546	$2,021	3%	7	14%	46	$92,930
Grüner Veltliner	58	$126,566	$2,190	-4%	67	54%	125	$272,611
Muscat à Petits Grains Blancs	11						11	$14,784
Pinot Gris/Grigio	959	$2,047,523	$2,135	16%	497	34%	1,456	$3,107,735
Prosecco	28				30	52%	57	$61,043
Riesling	88	$200,222	$2,265	27%	44	33%	132	$299,202
Sauvignon Blanc	3,838	$7,629,528	$1,988	12%	1,755	31%	5,593	$11,119,512
Semillon	66				29	31%	96	$174,003
Vermentino	12						12	$22,050
Viognier	22	$28,922	$1,323	-10%	5	20%	27	$36,159
Other white	25	$52,421	$2,095	16%	32	56%	57	$116,198
White Total	**8,763**	**$18,636,610**	**$2,127**	**13%**	**3,326**	**28%**	**12,088**	**$25,569,780**
Grand Total	**13,500**	**$29,558,936**	**$2,189**	**14%**	**4,626**	**26%**	**18,125**	**$39,436,854**

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					26	26
Cabernet Sauvignon		8	136	152		296
Graciano					0	0
Grenache					6	6
Malbec					0	0
Merlot			247	3		250
Montepulciano					26	26
Nebbiolo					15	15
Nero d'Avola		5			7	12
Pinot Meunier				18	84	102
Pinot Noir		32		388	2,941	3,361
Sangiovese				32	12	43
Shiraz			39	264	120	424
Tempranillo					100	100
Other red		6		5	67	78
Red Total		**50**	**422**	**862**	**3,403**	**4,737**

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	15		14	840	2,739	3,608
Fiano					9	9
Gewürztraminer				5	35	39
Grüner Veltliner				11	47	58
Muscat à Petits Grains Blancs			11			11
Pinot Gris/Grigio				280	679	959
Prosecco			28			28
Riesling				13	76	88
Sauvignon Blanc			169	1,675	1,993	3,838
Semillon				33	33	66
Vermentino				12		12
Viognier			8	14		22
Other white				8	17	25
White Total	**15**		**229**	**2,892**	**5,627**	**8,763**
Total purchased	**15**	**50**	**651**	**3,754**	**9,029**	**13,500**

Adelaide Hills

Current plantings by variety and year planted

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Barbara	6	0	0	1	7	14%
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	197	0	0	0	197	0%
Dolcetto	1	0	0	1	2	50%
Gamay	6	1	2	5	14	36%
Grenache	2	0	1	0	3	0%
Malbec	2	1	0	0	3	0%
Mencia	2	0	0	0	2	0%
Merlot	121	0	0	0	121	0%
Meunier (Pinot Meunier)	19	0	0	1	20	5%
Montepulciano	5	0	0	0	5	0%
Nebbiolo	13	0	0	3	16	19%
Nero d'Avola	3	0	0	0	3	0%
Petit Verdot	2	0	0	0	2	0%
Pinot Noir	651	35	15	10	711	2%
Sangiovese	15	0	0	0	15	0%
Shiraz	387	4	0	4	395	1%
Tempranillo	31	0	0	0	31	0%
Other Red	14	0	0	1	15	2%
Total red varieties	**1,483**	**41**	**18**	**26**	**1,568**	**2%**
White winegrapes						
Arneis	5	0	0	1	6	17%
Chardonnay	811	9	2	1	823	0%
Fiano	9	0	0	3	12	25%
Gruner Veltliner	20	0	1	0	21	0%
Muscat Gordo Blanco	1	0	0	0	1	0%
Pinot Blanc	2	0	0	0	2	0%
Pinot Gris	251	2	0	1	254	0%
Prosecco	5	0	0	0	5	0%
Riesling	47	1	0	3	51	6%
Sauvignon Blanc	839	1	1	4	845	1%
Savagnin	6	0	0	0	6	0%
Semillon	30	0	0	0	30	0%
Traminer (Gewurztraminer)	13	2	0	0	15	0%
Viognier	15	0	0	0	15	0%
Other White	12	0	0	2	16	13%
Total white varieties	**2,066**	**15**	**4**	**15**	**2,100**	**1%**
Rootstock Block	2	0	0	0	2	0%
Unknown variety	38	0	0	0	38	0%
Total all varieties	**3,589**	**56**	**22**	**41**	**3,708**	**1%**

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 91 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 2023).

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

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.
- Planting data tables are current as at 30 April 2023 and include all plantings from the 2022–23 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 wine sector National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association and Wine Grape Council 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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