

SA Winegrape Crush Survey 2024

Regional Summary Report

Adelaide Hills Wine Region

Wine Australia July 2024

DATUM: GDA2020
 PROJECTION: SA Lambert
 DATE: 15 February 2023
 SOFTWARE: ESRI ArcGIS v10.7.1
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

Adelaide Hills Wine Region



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Adelaide Hills

Vintage overview

VINTAGE REPORT

A lingering summer ensured minimal disease and optimal ripening conditions for Vintage 2024 for the Adelaide Hills. However, conditions during flowering severely impacted the season outcome for grape growers as poor set generally resulted in diminished crops.

The forecast for the 2023/24 season was for hotter and drier El Niño conditions, which was initially confirmed by a warm and dry September and an earlier budburst than for the previous seasons in the 2020s. This followed winter rainfall which was 90 per cent of the Long-Term Average (LTA) for Lenswood (556mm) and included an unusually wet June when 200 per cent of the LTA (272mm) was recorded.

Optimal soil moisture profiles in spring ensured strong shoot growth and flower development, despite cool conditions. However, cold conditions persisted during flowering resulting in poor set, particularly in early flowering varieties. This, combined with above average rainfall in December and January (150 per cent of average) resulted in significant challenges with downy mildew and Botrytis infections. Vineyards with good spray programs (which included preventatives for powdery mildew) and with good coverage had minimal issues.

Fortunately, no rainfall in February and low rainfall in March meant that the harvest had no disease issues. Good-sized canopies and soil moisture management ensured that the only heatwave in mid-March (35-37°C for six days) resulted in good balances of malic and tartaric acid and excellent pH. Pristine fruit meant that winemakers are very pleased with the quality of Vintage 2024 albeit with a smaller than desired harvest.

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 2024 was 14,275 tonnes, down by 21 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Adelaide Hills has been 19,346 tonnes, making this year's crush 26 per cent below the five-year average.

There were 81 respondents to the survey who reported crushing grapes from the Adelaide Hills in 2024, compared with 83 in 2023.

The total value of winegrapes in 2024 was \$32 million, lower than last year, with the decreased production partly offset by an increase in the average purchase value of grapes, which was up by 3 per cent from \$2,189 to \$2,251 per tonne.

There were increases in average prices for the two largest varieties: Chardonnay up by 3 per cent to \$2,365 per tonne and Sauvignon Blanc up by 4 per cent to \$2,071 per tonne. On the other hand, Pinot Noir decreased by 3 per cent to \$2,476 per tonne.

The price dispersion data shows an upward shift in prices paid, with 78 per cent of all grapes being purchased at \$2000 per tonne or above compared with 67 per cent in 2023.

There were 53 hectares of new vines planted in the region in the 2023–24 season, the same as the previous season. Almost half of the new plantings were Pinot Noir (24 hectares).

The total vineyard area in the Adelaide Hills as at 30 April 2024 was 3,705 hectares—almost identical to 2023, and 125 hectares less than it was 5 years ago. The average vineyard size in Adelaide Hills is 11.7 hectares, compared with the state average of 16.1 hectares.

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	11	\$32,754	\$2,909	8%	8	42%	19	\$56,611
Cabernet Franc	1				32	98%	33	\$75,179
Cabernet Sauvignon	67				80	54%	146	\$195,438
Malbec	4						4	\$6,715
Merlot	207	\$177,556	\$856	-13%	25	11%	232	\$198,790
Montepulciano	18	\$40,537	\$2,248	1%	2	8%	20	\$43,932
Nebbiolo	15	\$41,848	\$2,770	24%	36	71%	52	\$142,919
Nero d'Avola	15	\$29,885	\$2,018	0%			15	\$29,885
Pinot Meunier	66	\$169,665	\$2,570	-1%	1	1%	67	\$170,951
Pinot Noir	2,474	\$6,116,864	\$2,476	-3%	763	24%	3,237	\$8,005,991
Ruby Cabernet					6	100%	6	\$6,370
Sangiovese	69	\$156,341	\$2,260	16%	11	13%	80	\$180,118
Shiraz	343	\$619,564	\$1,805	-2%	522	60%	865	\$1,561,253
Tempranillo	79	\$189,308	\$2,409	6%	14	16%	93	\$224,060
Other red	81	\$231,375	\$2,852	10%	31	28%	112	\$284,137
Red Total	3,450	\$7,902,720	\$2,293	-1%	1,530	31%	4,980	\$11,182,347

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

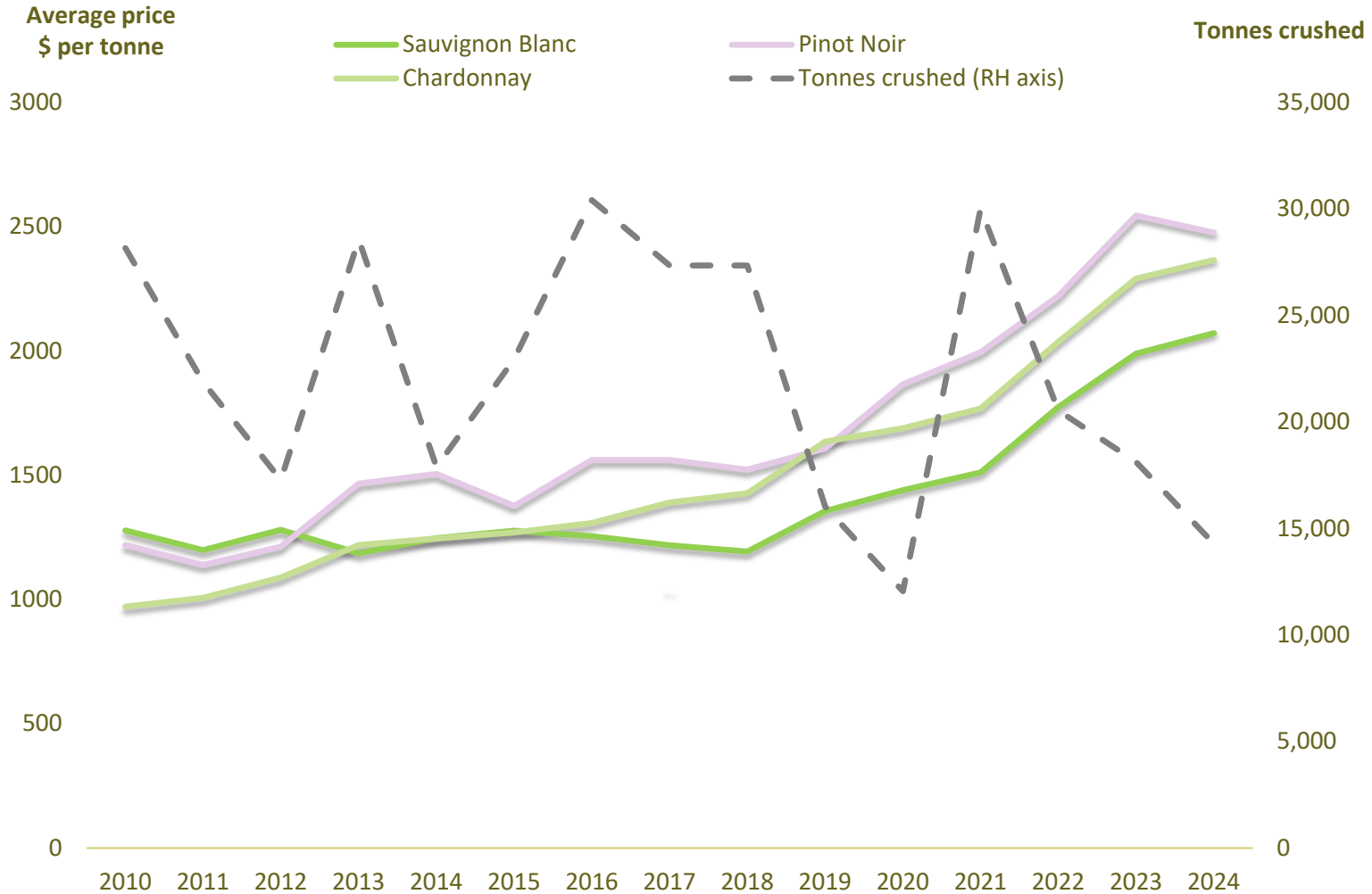
Winegrape intake summary table – white winegrapes

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	2,873	\$6,799,084	\$2,365	3%	938	25%	3,811	\$9,017,723
Fiano	12	\$31,650	\$2,622	0%			12	\$31,650
Gewürztraminer	49	\$101,469	\$2,079	3%	2	4%	51	\$105,523
Grüner Veltliner	23	\$54,883	\$2,388	9%	61	73%	84	\$200,571
Pinot Gris/Grigio	792	\$1,740,990	\$2,198	3%	535	40%	1,328	\$2,917,726
Prosecco	31				25	45%	57	\$66,567
Riesling	157	\$373,966	\$2,384	5%	40	20%	197	\$469,266
Sauvignon Blanc	2,117	\$4,384,253	\$2,071	4%	1,447	41%	3,565	\$7,382,391
Semillon	29				12	29%	41	\$88,250
Vermentino	18						18	\$27,498
Viognier	23	\$36,970	\$1,592	20%	7	22%	30	\$47,558
Other white	27	\$52,854	\$1,961	-6%	76	74%	103	\$204,698
White Total	6,152	\$13,703,253	\$2,227	5%	3,143	34%	9,295	\$20,559,422
Grand Total	9,601	\$21,605,973	\$2,251	3%	4,674	33%	14,275	\$31,741,769

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)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera					11	11
Cabernet Franc					1	1
Cabernet Sauvignon		8	18	35	6	67
Malbec				3	1	4
Merlot	52		151		4	207
Montepulciano					18	18
Nebbiolo					15	15
Nero d'Avola				4	11	15
Pinot Meunier				21	45	66
Pinot Noir				232	2,242	2,474
Sangiovese				14	56	69
Shiraz		10	110	105	118	343
Tempranillo				3	76	79
Other red					81	81
Red Total	52	18	279	417	2,684	3,450

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Price dispersion – purchased grapes (white)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
White						
Chardonnay				247	2,626	2,873
Fiano					12	12
Gewürztraminer				5	44	49
Grüner Veltliner					23	23
Pinot Gris/Grigio			15	94	683	792
Prosecco			20	11		31
Riesling				11	146	157
Sauvignon Blanc			11	858	1,246	2,115
Semillon					29	29
Vermentino			8	10		18
Viognier				23	0	23
Other white				12	15	27
White Total			54	1,271	4,825	6,149
Total purchased	52	18	333	1,688	7,508	9,599

Adelaide Hills

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Barbera	6	0	1	0	7	0%
Cabernet Franc	6	0	0	2	7	29%
Cabernet Sauvignon	182	0	0	0	182	0%
Dolcetto	2	0	1	0	3	0%
Gamay	7	3	5	1	16	6%
Grenache	2	1	0	0	3	0%
Malbec	4	0	0	0	4	0%
Mencia	2	1	0	0	2	0%
Merlot	106	0	0	0	106	0%
Meunier (Pinot Meunier)	19	0	1	0	20	0%
Montepulciano	5	0	0	0	5	0%
Nebbiolo	13	0	3	2	18	11%
Nero d'Avola	4	0	0	0	4	0%
Pinot Noir	688	14	16	24	742	3%
Sangiovese	16	0	0	1	16	6%
Shiraz	367	0	4	0	372	0%
Tempranillo	33	0	0	0	33	0%
Other Red	15	1	1	1	17	6%
Red winegrapes Total	1,476	19	32	30	1,557	2%
White winegrapes						
Arneis	7	0	1	0	7	0%
Chardonnay	814	2	8	7	831	1%
Fiano	8	0	3	0	12	0%
Gruner Veltliner	20	1	0	0	21	0%
Pinot Blanc	2	0	0	0	2	0%
Pinot Gris	252	0	2	8	263	3%
Prosecco	5	0	0	0	5	0%
Riesling	39	0	4	0	44	0%
Sauvignon Blanc	832	1	0	7	840	1%
Savagnin	6	0	0	0	6	0%
Semillon	29	0	0	0	29	0%
Traminer (Gewurztraminer)	15	0	0	0	15	0%
Viognier	15	0	0	0	15	0%
Other White	13	0	4	0	16	0%
White winegrapes Total	2,057	5	22	23	2,106	1%
Unknown variety	39	0	0	0	39	0%
Rootstock	2	0	0	0	2	0%
All varieties Total	3,574	24	53	53	3,705	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 reported to have been 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 in 2024 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, leased or associated vineyards ("own grown") and fruit purchased from other grape producers ("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 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 2024).

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 (price dispersion), differences in quality 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 2024 and include all plantings from the 2023–24 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.
- The totals by year planted may not align with the total areas, as new plantings without a year are captured in the pre-2021 bucket, but not against the individual reported years.
- 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>

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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:

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About Wine Australia

Wine Australia supports a competitive wine sector by investing in research and innovation, 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 research development and adoption investments.

Credits

Image (Fleurieu vineyard) – Nigel Wood

GI maps – Vinehealth Australia

