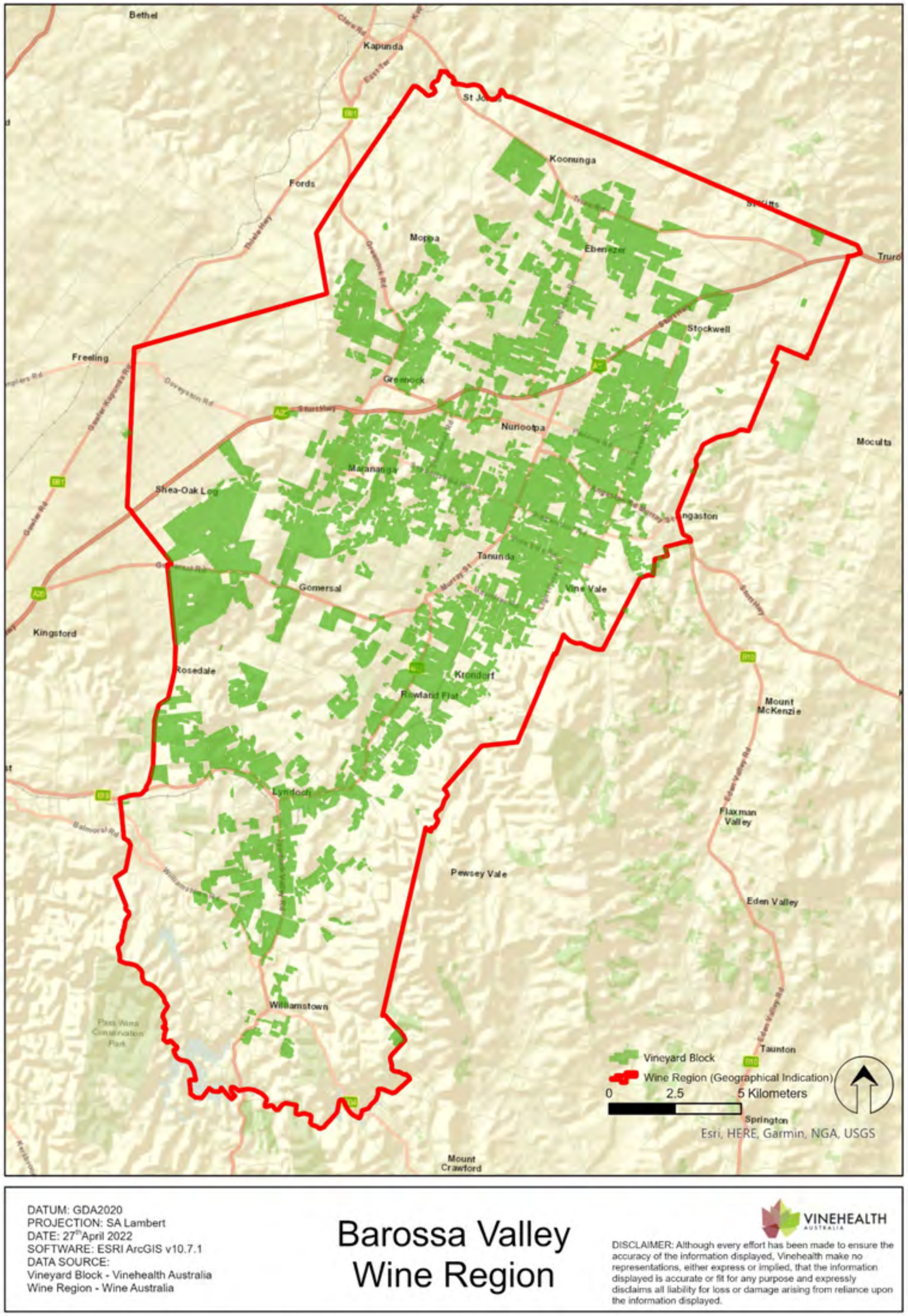


SA Winegrape Crush Survey 2022

Regional Summary Report

Barossa Valley Wine Region

Wine Australia July 2022

Barossa Valley

Vintage overview

VINTAGE REPORT

Across the Barossa Valley, weatherwise, the 2022 vintage growing season was quite average. The 2021 winter was the wettest winter recorded at Nuriootpa Weather Station since 1996. The wet winter was welcomed after the previous 3 years where the rainfall tally did not reach 200mm. October and November also presented rainfall totals above average. Some windy and damp weather in November led to a poor set in some varieties and vineyards. The forecast and expected summer rains from La Niña did not eventuate, to most growers' relief. A large rain event at the end of February assisted in freshening up the vines leading into harvest.

On the 28th of October there was a severe hailstorm that decimated some vineyards as it came through the central Barossa Valley. Many vines lost whole shoots and bunches with cane pruned vines being the most affected. The vines recovered a few weeks later and secondary shoots grew but these were typically less fruitful than primary shoots. The bunches that remained for the most part were relatively unscathed with good set. However, harvest was delayed as the fruit developed later and there was second crop present.

During February as the grapes entered their final ripening period weather conditions were balmy and temperatures below average. There was only one period where there were 3 consecutive days above 35°C but the temperature did not reach 40°C this summer at Nuriootpa. On the 28th of February another severe storm came through the Barossa, this time hitting some of the northern vineyards, bringing more damaging hail and rain.

The ongoing resilience of growers has seen them rewarded for the efforts this year. Some affected by the early hail have ripened second crops successfully, some even had average to above average crops in varieties such as Grenache.

Yalumba Vineyard Manager/Viticulturist Brooke Howell on behalf of Barossa Australia.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Barossa Valley winegrapes (including Barossa zone – other) was 49,640 tonnes in 2022, 20 per cent below the above-average 2021 reported crush of 61,741 tonnes. Over the past five years (up to 2021), the average crush for the Barossa Valley has been 52,464 tonnes, making this year's crush only 5 per cent below the five-year average.

There were 88 respondents to the survey who reported crushing grapes from the Barossa Valley in 2022, compared with 86 in 2021.

The total estimated value of winegrapes in 2022 was just over $101 million compared with $140.5 million in 2021. The lower production was compounded by a 10 per cent overall decrease in the average purchase value of grapes, which decreased from $2261 to $2033 per tonne.

The major red varieties declined in average value, with the exception of Grenache, which was up 1 per cent to $2384 per tonne, and Mataro/Mourvedre (up 4 per cent to $2246 per tonne). Shiraz decreased by 11 per cent to $2224 per tonne while Cabernet Sauvignon overtook Shiraz in average value for the first time.

The price dispersion data shows a downward shift, with 51 per cent of red varieties purchased at $2000 and above, compared with 73 per cent in 2021.

According to Vinehealth Australia data, the total vineyard area in the Barossa Valley as at 30 April 2022 was 11,941 hectares, including 216 hectares in Barossa zone – other. This is about 400 hectares more than it was 5 years ago.

There were 88 hectares of new vines planted in the region in the 2021-22 season (including top-working and replacements). Of these, there were 57 hectares of Shiraz and 19 hectares of Grenache planted.

Barossa Valley

Barossa Valley* winegrape intake summary table – red varieties

** Includes Barossa zone other – 1067 tonnes*

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	4						4	$7,636
Cabernet Franc	45				8	15%	52	$68,594
Cabernet Sauvignon	4,444	$8,720,721	$1,962	-13%	4,033	48%	8,477	$16,624,279
Durif	66	$126,765	$1,925	-12%	7	9%	72	$139,520
Graciano	12				18	60%	29	$43,422
Grenache	2,161	$5,156,095	$2,386	1%	1,015	32%	3,177	$7,576,740
Lagrein					0	100%	0	$361
Malbec	55	$114,291	$2,064	0%	39	41%	94	$195,031
Mataro/Mourvedre	660	$1,482,417	$2,246	4%	425	39%	1,086	$2,437,757
Merlot	372	$480,580	$1,292	-9%	680	65%	1,052	$1,358,263
Montepulciano	44	$87,178	$1,977	0%	66	60%	111	$218,489
Muscat à Petits Grains Rouges	5				20	82%	25	$19,692
Nebbiolo					4	100%	4	$11,078
Nero d'Avola	2				13	84%	15	$30,504
Petit Verdot	20	$33,911	$1,739	-8%	53	73%	72	$126,062
Pinot Meunier					3	100%	3	$5,148
Pinot Noir	120	$164,417	$1,368	58%	5	4%	125	$170,894
Sangiovese	284	$437,684	$1,539	7%	34	11%	318	$489,865
Shiraz	17,509	$38,902,995	$2,222	-11%	12,567	42%	30,076	$66,656,764
Tempranillo	177	$323,932	$1,833	-4%	85	32%	262	$479,543
Touriga Nacional	3				48	94%	51	$101,833
Other red	217	$333,893	$1,540	4%	283	57%	500	$745,238
Red Total	**26,200**	**$56,463,235**	**$2,155**	**-10%**	**19,406**	**43%**	**45,606**	**$97,506,712**

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

Barossa Valley

Barossa Valley* winegrape intake summary table – white varieties

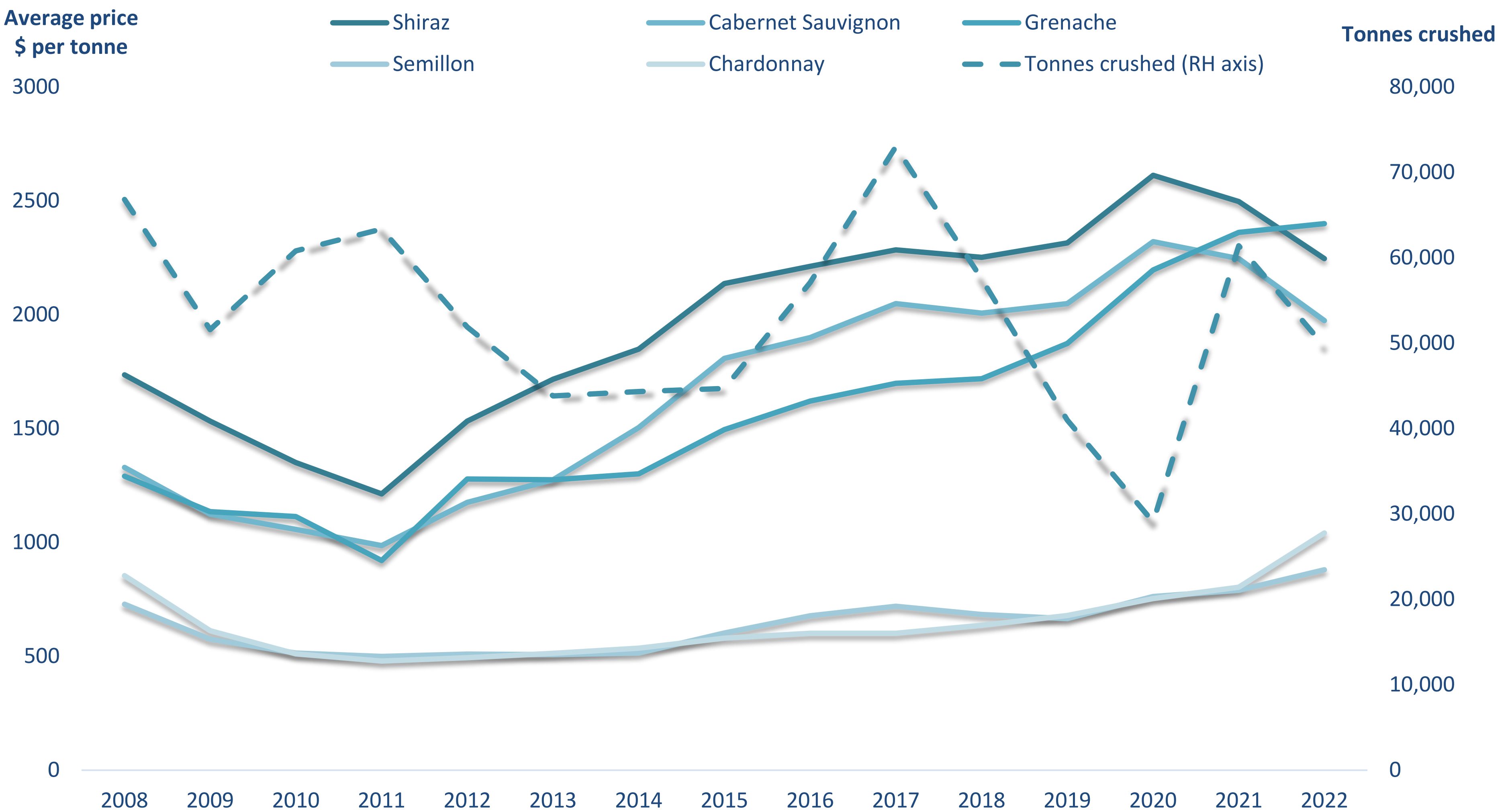
** Includes Barossa zone other – 0 tonnes*

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	1,078	$882,892	$819	2%	438	29%	1,517	$1,241,660
Chenin blanc	14				6	31%	20	$29,972
Fiano					18	100%	18	$29,661
Gewürztraminer	15				1	5%	16	$11,326
Marsanne	12	$20,507	$1,666	-6%	40	76%	52	$87,089
Muscat à Petits Grains Blancs	135	$134,231	$994	-7%	96	42%	231	$229,601
Pinot Gris/Grigio	102	$112,918	$1,110	4%	42	29%	144	$160,012
Riesling	392	$358,386	$915	-6%	68	15%	460	$420,924
Roussanne	20				5	22%	25	$42,097
Sauvignon Blanc	201				37	16%	238	$237,215
Semillon	723	$645,834	$894	13%	231	24%	954	$852,402
Vermentino	48				7	13%	55	$55,269
Viognier	166	$242,155	$1,455	7%	21	11%	187	$272,766
Other white	30	$50,939	$1,689	-3%	86	74%	116	$208,774
White Total	**2,937**	**$2,760,887**	**$940**	**1%**	**1,097**	**27%**	**4,034**	**$3,878,766**
Grand Total	**29,136**	**$59,224,122**	**$2,033**	**-10%**	**20,503**	**41%**	**49,640**	**$101,385,478**

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

Barossa Valley

Historical weighted average price vs tonnes crushed



Barossa Valley

Price dispersion – purchased grapes (red)

	Tonnes purchased in each segment						
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**No price**	**Total purchased**
Red							
Barbera					4		4
Cabernet Franc			33	12	0		45
Cabernet Sauvignon		61	330	2,446	1,608		4,444
Durif			23	6	37		66
Graciano			7	5			12
Grenache			64	255	1,842		2,161
Malbec				22	34		55
Mataro/Mourvedre			5	145	510		660
Merlot	42		183	105	41		372
Montepulciano			8	14	21		44
Muscat à Petits Grains Rouges		4	0				5
Nero d'Avola				1	1		2
Petit Verdot			5	9	6		20
Pinot Noir			75		45		120
Sangiovese			241	11	32		284
Shiraz		216	1,488	6,743	9,063		17,509
Tempranillo			26	120	31		177
Touriga Nacional						3	3
Other red			110	77	29		217
Red Total	**42**	**280**	**2,599**	**9,970**	**13,304**	**3**	**26,200**

Barossa Valley

Price dispersion – purchased grapes (white)

	Tonnes purchased in each segment						
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**No price**	**Total purchased**
White							
Chardonnay		816	256	7			1,078
Chenin blanc			4	10			14
Gewürztraminer		15					15
Marsanne				9	4		12
Muscat à Petits Grains Blancs		20	115				135
Pinot Gris/Grigio		31	71				102
Riesling		140	238	14			392
Roussanne				20			20
Sauvignon Blanc		3	198				201
Semillon	34	409	232	40	5	2	723
Vermentino			43	5			48
Viognier			23	139	3	2	166
Other white		2	10	9	9		30
White total	**34**	**1,436**	**1,188**	**253**	**21**	**4**	**2,937**
Total purchased	**77**	**1,717**	**3,787**	**10,223**	**13,325**	**7**	**29,136**

Barossa Valley

Barossa Valley* current plantings by variety and year planted – red varieties

** Includes Barossa zone other – 216 hectares*

	Area (hectares)					
Variety	**Pre-2019**	**2019**	**2020**	**2021**	**Total area (Ha)**	**% planted in 2021**
Red winegrapes						
Aglianico	2	0	0	0	2	*0%*
Alicante Bouschet	15	0	0	0	15	*0%*
Barbera	3	0	0	0	3	*0%*
Cabernet Franc	24	0	0	0	24	*0%*
Cabernet Sauvignon	1,610	62	38	6	1,716	*0%*
Carignan	8	0	0	0	8	*0%*
Cinsault	6	0	0	0	6	*0%*
Durif (Petite Sirah)	20	1	0	0	21	*0%*
Graciano	8	0	0	0	8	*0%*
Grenache	629	22	51	19	721	*3%*
Malbec	27	0	1	0	28	*0%*
Mataro (Mourvedre)	294	8	7	4	313	*1%*
Merlot	223	0	0	0	223	*0%*
Meunier (Pinot Meunier)	2	0	0	0	2	*0%*
Montepulciano	15	1	0	0	16	*0%*
Muscat A Petit Grains Rouge	1	0	0	0	1	*0%*
Nebbiolo	2	1	0	0	3	*0%*
Nero d'Avola	8	3	0	0	11	*0%*
Petit Verdot	17	0	0	0	17	*0%*
Pinot Noir	30	0	0	0	30	*0%*
Sangiovese	27	0	0	0	27	*0%*
Saperavo	6	0	0	0	6	*0%*
Shiraz	7,449	145	53	57	7,704	*1%*
Tannat	2	0	0	0	2	*0%*
Tempranillo	80	0	1	0	81	*0%*
Touriga	16	3	0	0	19	*0%*
Zinfandel	13	0	0	0	13	*0%*
Other Red	23	4	0	0	27	*0%*
Total red varieties	**10,560**	**250**	**151**	**86**	**11,047**	***1%***

Source: Vinehealth Australia

Barossa Valley

Barossa Valley* current plantings by variety and year planted – white varieties

** Includes Barossa zone other – 0 hectares (white)*

	Area (hectares)					
Variety	**Pre-2019**	**2019**	**2020**	**2021**	**Total area (Ha)**	**% planted in 2021**
White winegrapes						
Chardonnay	236	0	0	0	236	*0%*
Chenin Blanc	10	0	0	0	10	*0%*
Fiano	3	1	0	0	4	*0%*
Marsanne	9	0	0	0	9	*0%*
Muscadelle (Tokay)	11	0	0	0	11	*0%*
Muscat A Petit Grains Blanc (White Frontignac)	42	0	0	0	42	*0%*
Muscat Gordo Blanco	1	0	0	0	1	*0%*
Palomino	3	0	0	0	3	*0%*
Pedro Ximenez	5	0	0	0	5	*0%*
Pinot Gris	11	0	0	0	11	*0%*
Riesling	120	0	0	0	120	*0%*
Roussanne	3	0	0	0	3	*0%*
Sauvignon Blanc	40	0	1	0	41	*0%*
Semillon	235	0	0	0	235	*0%*
Traminer (Gewurztraminer)	5	0	0	0	5	*0%*
Vermentino	8	0	0	0	8	*0%*
Viognier	42	0	0	0	42	*0%*
Other White	14	2	1	2	19	*11%*
Total white varieties	**798**	**3**	**2**	**2**	**805**	***0%***
Unknown variety	87	0	0	0	87	*0%*
Rootstock block	1	0	0	0	1	*0%*
Table grapes	1	0	0	0	1	*0%*
Total all varieties	**11,447**	**253**	**153**	**88**	**11,941**	***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 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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