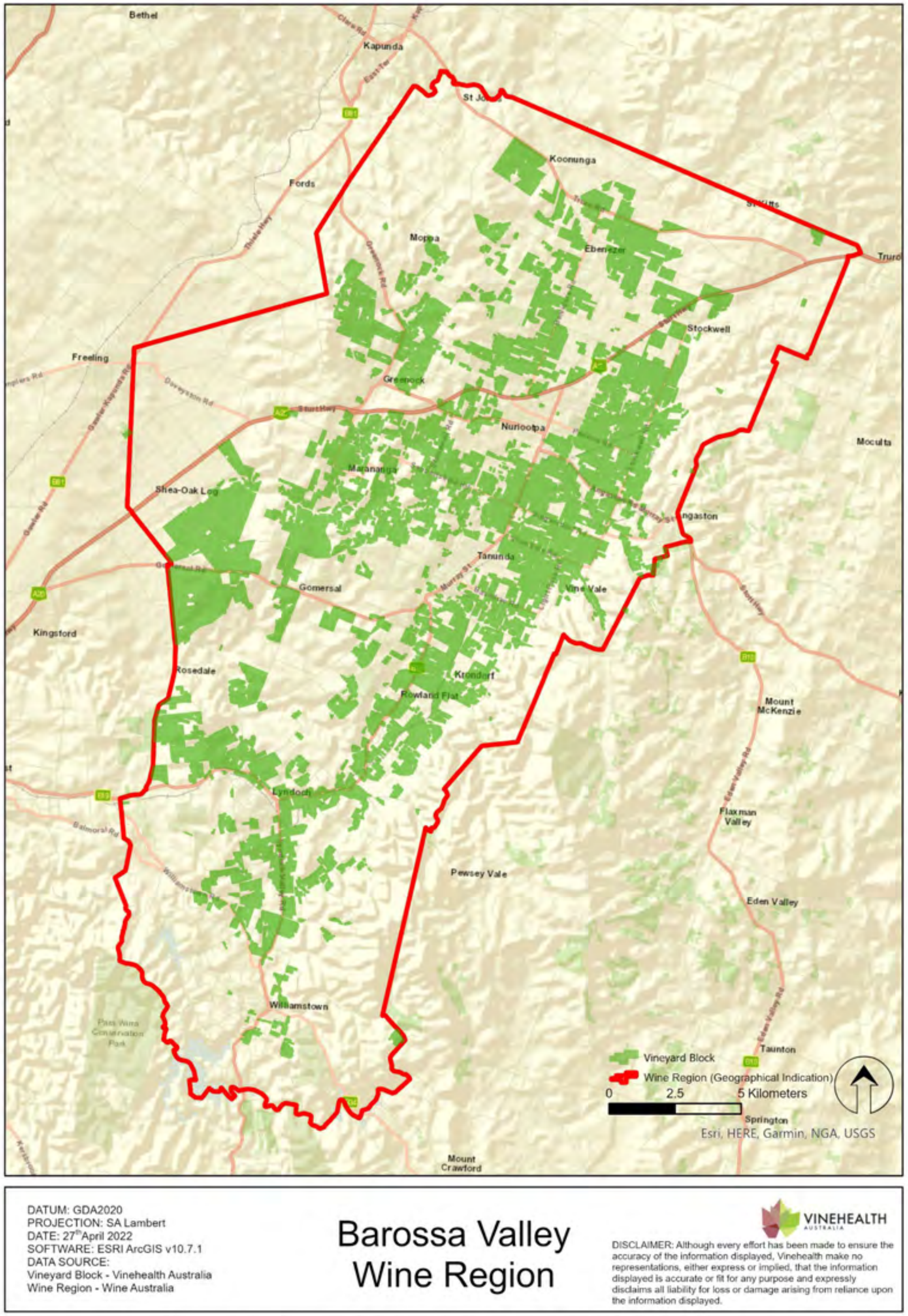


SA Winegrape Crush Survey 2023

Regional Summary Report

Barossa Valley Wine Region

Wine Australia July 2023

Barossa Valley

Vintage overview

VINTAGE REPORT

After a worryingly dry July where the Barossa Valley had only 54% of average rainfall, the skies opened and four months of well-above average rainfall followed. This filled dams and soil profiles but made it difficult to get onto vineyards in some places, which exacerbated the higher-than-normal disease pressure. Wet soils combined with cooler than average daytime temperatures in September and October caused vine growth to start 2-3 weeks later than usual.

The later season continued through spring and into summer, as the vines didn't flower in many cases until December. Set was very dependent on the weather on the day of flowering, but in general reasonable crops were set. It was great to see many vineyards that had been hit by hail in October 2021 recover and look terrific.

Much of the summer rain that was predicted didn't fall in the Barossa, with the region receiving only 43mm, or 56% of average. Summer days were sunny, with both maximum and minimum temperatures average and no heatwaves. Vines ripened slowly in this balmy weather, with veraison not occurring in many varieties until February.

Harvest eventually started in early March for some lighter white crops, but not until the middle of March for even the earliest red sites and varieties.

March and April continued to be relatively fine with just below average rainfall and temperatures. There were many grapes still to be harvested after Easter, and some of the later sites and varieties were not harvested until May. The hard work that was needed in the vineyard this year has in most cases paid off, as the long hang time has resulted in some exceptional flavours and structure. Reds have intense, rich and balanced flavours and colours; whites have lovely aromatics, finesse and great natural acidity. The early standout is Cabernet Sauvignon.

Louisa Rose on behalf of Barossa Australia.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Barossa Valley winegrapes (including Barossa zone – other) was 66,031 tonnes in 2023, 33 per cent above the 2022 reported crush of 49,640 tonnes and only 10 per cent below the record crush in 2017 of 73,009 tonnes. Over the past five years (up to 2022), the average crush for the Barossa Valley has been 47,724 tonnes, making this year's crush 38 per cent above the five-year average.

There were 83 respondents to the survey who reported crushing grapes from the Barossa Valley in 2023, compared with 88 in 2022.

The total estimated value of winegrapes in 2023 was $126.8 million compared with $101.4 million in 2022. The higher production eased the 7 per cent overall decrease in the average purchase value of grapes, which decreased from $2033 to $1897 per tonne.

The major red varieties declined in average value, with the exception of Merlot, which was up 10 per cent to $1423 per tonne, and Grenache which stayed at $2395 per tonne. Shiraz continued to decrease from its peak of $2612 per tonne in 2020; it was down 11 per cent to $1988 per tonne. NB These prices relate to Barossa Valley only.

The price dispersion data shows a slight downward shift, with 49 per cent of red varieties purchased at $2000 and above, compared with 51 per cent in 2022.

According to Vinehealth Australia data, the total vineyard area in the Barossa Valley as at 30 April 2023 was 11,913 hectares, including 213 hectares in Barossa zone – other. This is virtually the same as last year and about 259 hectares more than it was 5 years ago.

There were 29 hectares of new vines planted in the region in the 2022-23 season (including top-working and replacements). Of these, there were 16 hectares of Shiraz and 5 hectares of Grenache planted.

Barossa Valley

Barossa Valley* winegrape intake summary table – red varieties

** Includes Barossa zone other – 1077 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	2						2	$4,880
Cabernet Franc	43	$44,930	$1,043	0%	16	27%	59	$61,418
Cabernet Sauvignon	4,820	$8,992,457	$1,866	-5%	4,237	47%	9,057	$16,883,060
Durif	61	$104,720	$1,712	-11%	28	32%	89	$153,043
Graciano	22	$30,456	$1,397	0%	7	25%	29	$40,585
Grenache	2,509	$6,008,889	$2,395	0%	1,274	34%	3,783	$9,058,626
Malbec	63	$141,566	$2,244	9%	71	53%	134	$300,944
Mataro/Mourvedre	714	$1,582,642	$2,218	-1%	506	42%	1,220	$2,705,654
Merlot	506	$719,894	$1,423	10%	792	61%	1,298	$1,846,589
Montepulciano	54	$109,123	$2,019	2%	82	60%	136	$275,028
Muscat à Petits Grains Rouges	2				25	93%	26	$26,137
Nero d'Avola	14	$25,992	$1,800	0%	35	71%	49	$88,144
Petit Verdot	18	$26,127	$1,443	-17%	60	77%	78	$112,262
Pinot Meunier					6	100%	6	$12,231
Pinot Noir	98	$121,730	$1,237	-10%	32	25%	131	$161,849
Sangiovese	250	$333,372	$1,331	-14%	73	22%	323	$429,929
Shiraz	25,078	$49,883,686	$1,989	-11%	19,572	44%	44,651	$89,319,440
Tempranillo	262	$488,088	$1,861	2%	72	22%	334	$621,970
Touriga Nacional	10				85	90%	95	$151,438
Other red	308	$541,487	$1,756	14%	123	29%	432	$747,635
Red Total	**34,836**	**$69,177,288**	**$1,985**	**-8%**	**27,095**	**44%**	**61,931**	**$123,000,863**

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

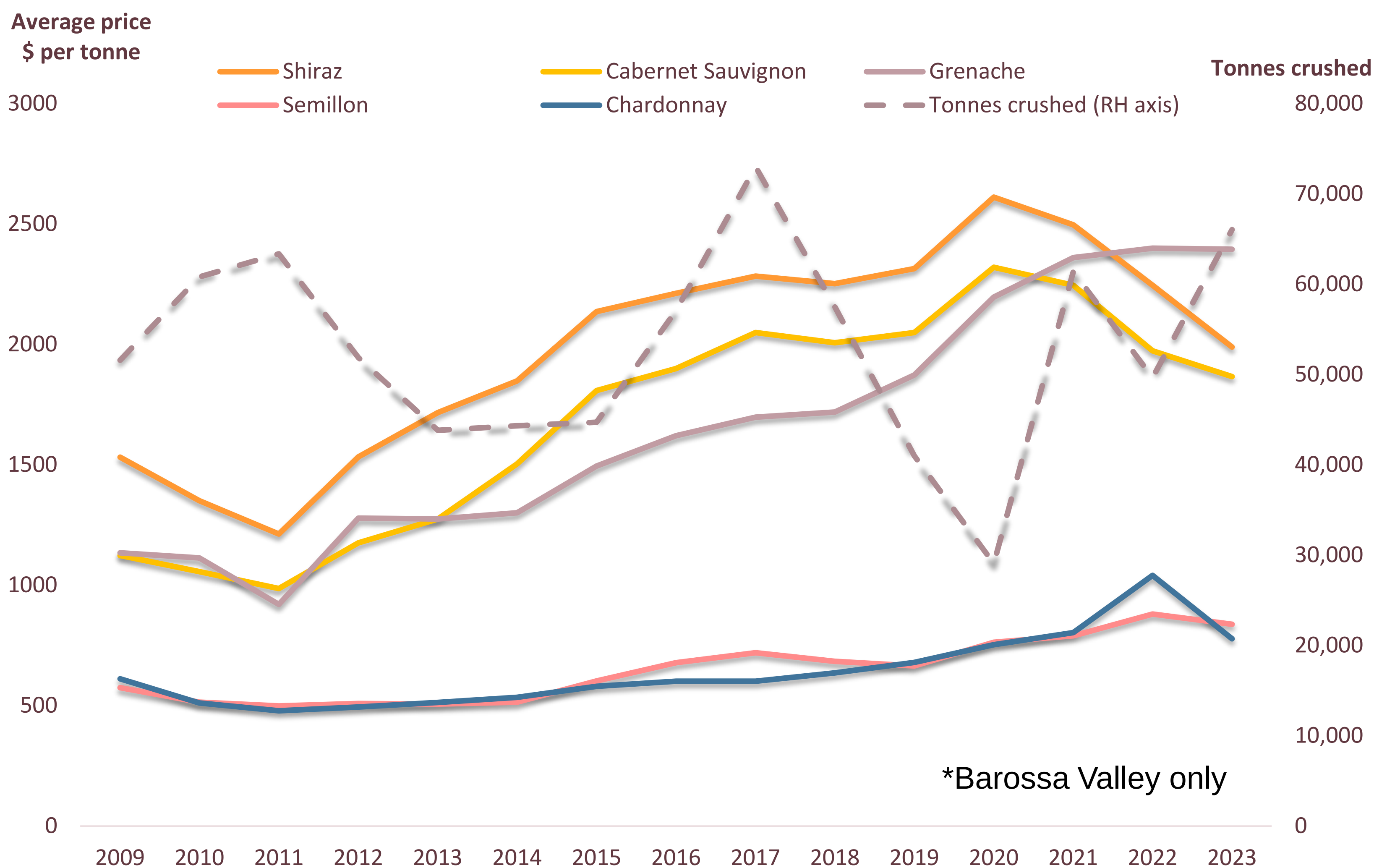
** Includes Barossa zone other – 3 tonnes*

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	848	$660,382	$778	-5%	240	22%	1,088	$847,112
Chenin blanc	18						18	$26,231
Fiano	3				29	90%	33	$52,048
Gewürztraminer	15						15	$10,416
Marsanne	18	$32,986	$1,852	11%	51	74%	69	$127,265
Muscat à Petits Grains Blancs	132	$127,351	$967	-3%	97	42%	229	$221,205
Pinot Gris/Grigio	136	$133,749	$986	-11%	82	38%	218	$214,667
Riesling	476	$414,104	$870	-5%	96	17%	572	$497,597
Roussanne	16	$27,774	$1,701	0%	3	16%	19	$33,107
Sauvignon Blanc	222				39	15%	261	$236,244
Semillon	816	$683,918	$838	-6%	204	20%	1,020	$854,398
Vermentino	109	$103,980	$958	0%	11	9%	120	$114,438
Viognier	286	$386,318	$1,351	-6%	42	13%	328	$442,645
Other white	22	$26,937	$1,236	-27%	90	81%	112	$134,609
White Total	**3,116**	**$2,840,332**	**$911**	**-3%**	**984**	**24%**	**4,100**	**$3,811,981**
Grand Total	**37,952**	**$72,017,620**	**$1,897**	**-7%**	**28,079**	**43%**	**66,031**	**$126,812,844**

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**	**Total purchased**
Red						
Barbera					2	2
Cabernet Franc		9	29	5		43
Cabernet Sauvignon	57	201	1,569	700	2,293	4,820
Durif			33	4	25	61
Graciano			6	16		22
Grenache	15		91	223	2,181	2,509
Malbec			7	28	28	63
Mataro/Mourvedre			21	121	568	710
Merlot	63	192	61	67	123	506
Montepulciano				29	25	54
Muscat à Petits Grains Rouges		1	1			2
Nero d'Avola				14		14
Petit Verdot			8	6	4	18
Pinot Noir	9	4	56		29	98
Sangiovese			226	13	12	250
Shiraz	294	1,865	6,503	4,714	11,675	25,051
Tempranillo			13	216	33	262
Touriga Nacional				10		10
Other red			104	50	154	308
Red Total	**437**	**2,272**	**8,727**	**6,217**	**17,151**	**34,805**

Barossa Valley

Price dispersion – purchased grapes (white)

Tonnes purchased in each segment						
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
White						
Chardonnay	123	531	173	22		848
Chenin blanc			6	12		18
Fiano				3		3
Gewürztraminer		15				15
Marsanne				6	12	18
Muscat à Petits Grains Blancs		33	95	3		132
Pinot Gris/Grigio		46	75	14		136
Riesling		167	301	9		476
Roussanne				16		16
Sauvignon Blanc		6	216			222
Semillon	51	542	182	17	17	809
Vermentino		89		19		109
Viognier			253	30	3	286
Other white		1	17	3		22
White Total	**174**	**1,429**	**1,318**	**155**	**32**	**3,109**
Total purchased	**611**	**3,702**	**10,046**	**6,373**	**17,183**	**37,914**

Barossa Valley

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

** Includes Barossa zone other – 211 hectares (red)*

Variety	Area (hectares) Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
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	1,657	38	13	1	1,709	0%
Carignan	8	0	0	0	8	0%
Cinsault	5	0	0	0	5	0%
Durif (Petite Sirah)	21	0	0	0	21	0%
Graciano	7	0	0	0	7	0%
Grenache	649	46	24	5	724	1%
Malbec	27	1	0	0	28	0%
Mataro (Mourvedre)	300	7	4	4	315	1%
Merlot	219	0	0	0	219	0%
Meunier	2	0	0	0	2	0%
Montepulciano	16	0	0	0	16	0%
Muscat A Petit Grains Rouge	1	0	0	0	1	0%
Nebbiolo	3	0	0	0	3	0%
Nero D'Avola	11	0	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%
Saperavi	6	0	0	0	6	0%
Shiraz	7,568	53	55	16	7,692	0%
Tannat	2	0	0	0	2	0%
Tempranillo	80	1	0	0	81	0%
Touriga	18	0	0	0	18	0%
Zinfandel	13	0	0	0	13	0%
Other Red	36	0	0	0	36	0%
Total red varieties	**10,767**	**146**	**96**	**26**	**11,035**	**0%**

Source: Vinehealth Australia

Barossa Valley

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

** Includes Barossa zone other – 2 hectares (white)*

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
	Area (hectares)					
White winegrapes						
Chardonnay	232	0	0	0	232	0%
Chenin Blanc	10	0	0	0	10	0%
Fiano	5	0	0	0	5	0%
Grenache Blanc	2	1	0	1	4	25%
Marsanne	9	0	0	0	9	0%
Muscadelle (Tokay)	11	0	0	0	11	0%
Muscat A Petit Grains Blanc (White Frontignac)	39	0	0	0	39	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	118	0	0	0	118	0%
White winegrapes						
Roussanne	4	0	0	0	4	0%
Sauvignon Blanc	39	1	0	0	40	0%
Semillon	231	0	0	0	231	0%
Traminer	5	0	0	0	5	0%
Vermentino	8	0	0	0	8	0%
Viognier	41	0	0	0	41	0%
Other White	15	0	2	2	19	11%
Total white varieties	**789**	**2**	**2**	**3**	**796**	**0%**
Unknown variety	81	0	0	0	81	0%
Multi-purposed red	1	0	0	0	1	0%
Total all varieties	**11,638**	**148**	**98**	**29**	**11,913**	**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 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 the 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

Disclaimer

This information has been made available to assist on the understanding that Wine Australia is not rendering professional advice. Wine Australia does not accept responsibility for the results of any actions taken on the basis of the information contained in this report, nor for the accuracy, currency or completeness of any material contained in it. Wine Australia expressly disclaims all and any liability and responsibility to any person in respect of consequences of anything done in respect of reliance, whether wholly or in part, upon this report.

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, 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