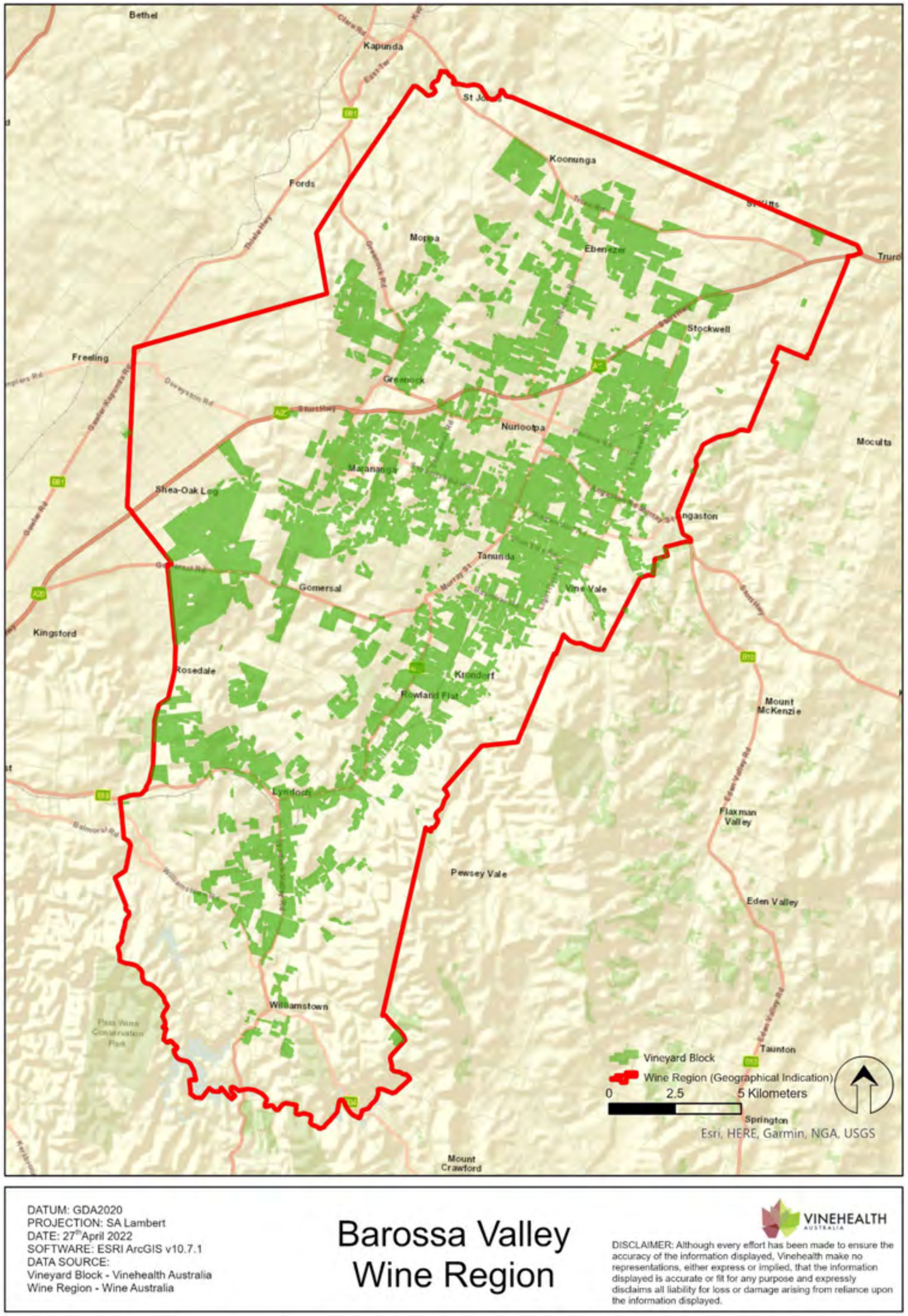


SA Winegrape Crush Survey 2024

Regional Summary Report

Barossa Valley Wine Region

Wine Australia July 2024

Barossa Valley

Vintage overview

VINTAGE REPORT

After a long and late 2023 vintage, 2024 vintage proved to be quite the opposite.

Despite a reasonable break at the end of the 2023 harvest, the Barossa Valley did not receive the soaking winter rains growers had hoped for. Winter was 28 per cent below average rains and spring was even drier with only 48 per cent of average.

The dry winter and spring made the vines work during the early part of the growing season, and bud burst started in September, three weeks earlier than the year before. With dry springs came clear and cold and frosty nights, particularly in September and October. Some vineyards had significant damage that influenced their subsequent yield.

Windy weather and a heat spike in November caused issues with some vineyards where this was coincident with flowering and hence fruit set.

With some rain, and slightly cooler than average days, December and early January saw vines flourish and move quickly into their ripening phase. Veraison in many vineyards was a month earlier than 2023. January finished with average temperatures, but in February, with no rain and the temperature 2°C above average, vines ripened quickly, and harvest was away. Whites ripened quickly, retaining good fragrance and natural acids early. Reds, with small berries, show intensity and vibrancy.

The early season was a blessing for many who had already picked before an unseasonal heatwave in early March. Most varieties and vineyards were picked before Easter (end of March) with only the later ripening varieties Grenache and Mataro being harvested into April.

In 2024, quality across the board looks exceptional, although yields are variable. Particular standouts are Grenache and Cabernet, but that's not to take away from some exceptional parcels of Riesling, Semillon and Shiraz.

Louisa Rose on behalf of Barossa Australia.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Barossa Valley winegrapes in 2024 (including Barossa zone – other) was 50,145 tonnes, down by 24 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Barossa Valley has been 49,427 tonnes, making this year's crush 1 per cent above the five-year average.

There were 97 respondents to the survey who reported crushing grapes from the Barossa Valley in 2024, compared with 83 in 2023.

The total value of winegrapes in 2024 was $91 million, compared with $127 million in 2023, a decrease of 28 per cent. The overall average value declined by 5 per cent from $1,897 to $1,803 per tonne.

The major red varieties continued to decline in average value, with Shiraz down 6 per cent compared with 2023 to $1866 per tonne, while Cabernet Sauvignon was down 5 per cent to $1766 per tonne. NB These prices relate to Barossa Valley only. Grenache had the highest average value of the reds at $2354 per tonne but declined by 2 per cent year-on-year.

The price dispersion data shows a downward shift in prices paid, with 41 per cent of red varieties purchased at $2000 per tonne or above compared with 49 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in the Barossa Valley as at 30 April 2024 was 11,930 hectares, including 212 hectares in Barossa zone – other. This is virtually the same as last year and about 228 hectares more than it was 5 years ago. The average vineyard size in Barossa Valley is 14.2 hectares, compared with the state average of 16.1 hectares.

There were 66 hectares of new vines planted in the region in the 2023–24 season (including top-working and replacements) compared with 41 in the previous season. Of these, the main varieties planted were Shiraz and Grenache (both 24 hectares).

Barossa Valley

Barossa Valley* winegrape intake summary table – red varieties

** Includes Barossa zone other – 673 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	1						1	$2,664
Cabernet Franc	22	$22,333	$1,005	-4%	19	47%	42	$41,794
Cabernet Sauvignon	3,210	$5,662,837	$1,764	-5%	2,644	45%	5,854	$10,328,567
Durif	47	$76,527	$1,637	-4%	26	36%	73	$119,346
Graciano	15	$25,410	$1,676	20%	8	35%	23	$38,970
Grenache	2,315	$5,449,701	$2,354	-2%	1,405	38%	3,720	$8,756,850
Lagrein					0	100%	0	$180
Malbec	18	$32,799	$1,811	-19%	87	83%	105	$190,047
Mataro/Mourvedre	1,007	$2,308,292	$2,293	3%	677	40%	1,684	$3,861,069
Merlot	301	$359,954	$1,194	-16%	690	70%	992	$1,184,514
Montepulciano	50	$102,395	$2,056	2%	43	46%	93	$190,554
Muscat à Petits Grains Rouges	3				18	87%	20	$17,655
Nebbiolo					5	100%	5	$13,962
Nero d'Avola	10	$19,077	$1,956	9%	31	76%	41	$80,391
Petit Verdot	18				67	79%	85	$149,874
Pinot Meunier					4	100%	4	$8,094
Pinot Noir	118	$180,454	$1,533	24%	16	12%	133	$207,910
Sangiovese	252	$333,645	$1,321	-1%	65	21%	318	$420,124
Shiraz	18,381	$34,277,032	$1,865	-6%	14,246	44%	32,627	$60,575,831
Tempranillo	255	$451,186	$1,772	-5%	71	22%	326	$577,218
Touriga Nacional	17				101	85%	119	$143,767
Other red	244	$412,479	$1,692	-4%	128	34%	372	$608,673
Red Total	**26,284**	**$49,771,542**	**$1,894**	**-5%**	**20,352**	**44%**	**46,636**	**$87,518,055**

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

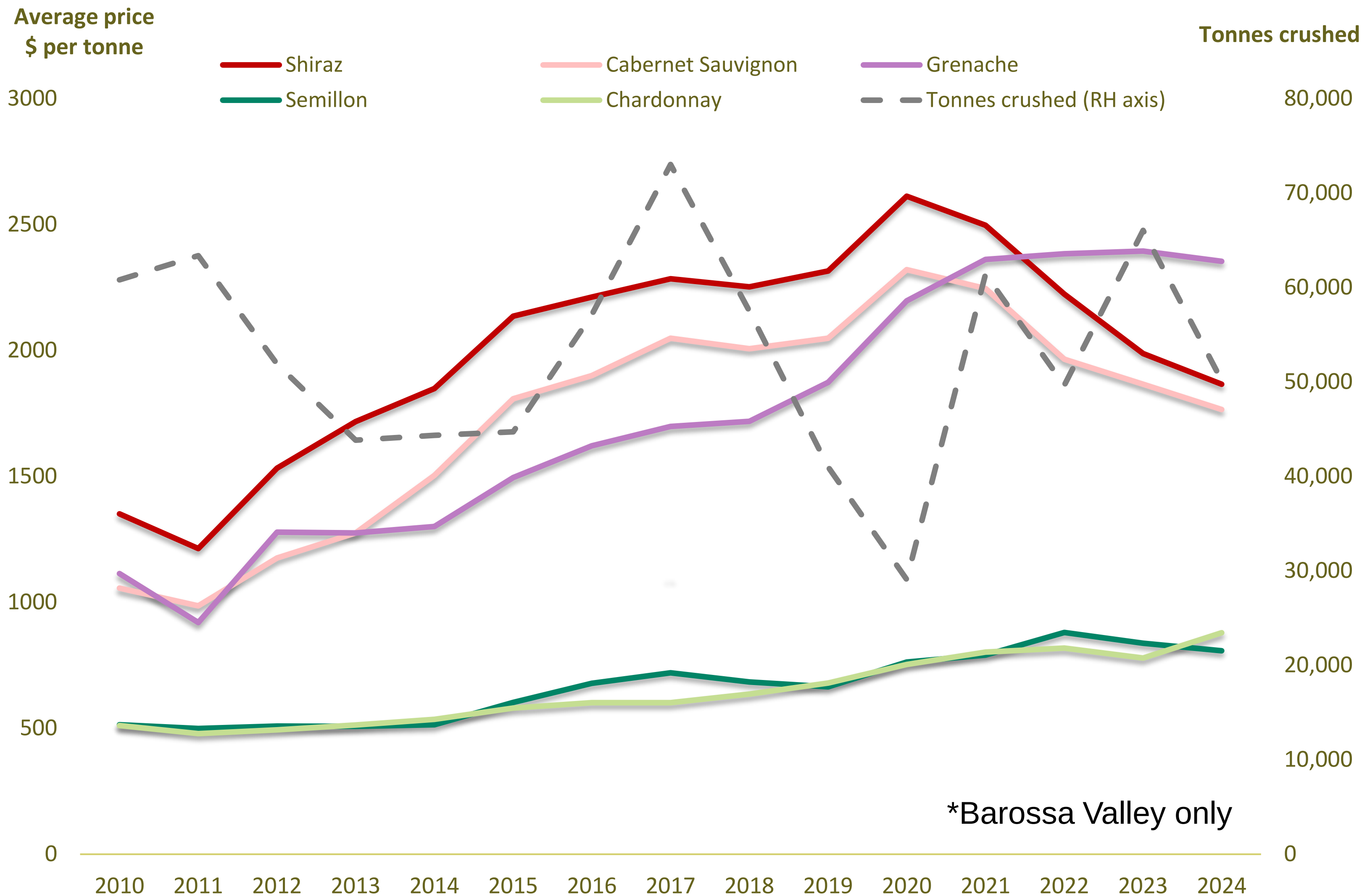
** Includes Barossa zone other – 22 tonnes*

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	1,038	$912,483	$879	13%	99	9%	1,137	$1,000,728
Chenin blanc	5				16	74%	21	$35,110
Fiano	24				7	23%	31	$55,695
Marsanne	15	$28,202	$1,851	-0%	56	79%	72	$132,519
Muscat à Petits Grains Blancs	119	$103,798	$874	-10%	11	8%	130	$113,397
Pinot Gris/Grigio	133	$138,332	$1,041	6%	41	23%	174	$180,586
Prosecco	0						0	$281
Riesling	316	$273,885	$867	-0%	88	22%	405	$358,076
Roussanne	20	$38,954	$1,930	13%	11	35%	31	$59,668
Sauvignon Blanc	204				21	9%	226	$210,657
Semillon	555	$470,353	$848	1%	225	29%	780	$661,205
Vermentino	70				7	9%	77	$73,586
Viognier	211	$256,183	$1,214	-10%	61	22%	272	$329,640
Other white	65	$79,720	$1,217	-2%	90	58%	155	$194,727
White Total	**2,776**	**$2,612,624**	**$941**	**3%**	**733**	**21%**	**3,509**	**$3,405,873**
Grand Total	**29,060**	**$52,384,167**	**$1,803**	**-5%**	**21,085**	**42%**	**50,145**	**$90,923,929**

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				1		1
Cabernet Franc		6	11	3		20
Cabernet Sauvignon		282	1,052	778	1,096	3,207
Durif			20	11	15	47
Graciano				15		15
Grenache	13		214	291	1,797	2,315
Malbec			3	4	11	18
Mataro/Mourvedre			16	217	774	1,007
Merlot		157	59	32	52	301
Montepulciano				22	27	50
Muscat à Petits Grains Rouges		2	1			3
Nero d'Avola				7	2	10
Petit Verdot			6	4	8	18
Pinot Noir			70		48	118
Sangiovese			210	6	37	252
Shiraz		3,114	3,930	4,685	6,647	18,377
Tempranillo			16	193	46	255
Touriga Nacional	6			11		17
Other red		4	108	25	107	244
Red Total	**19**	**3,566**	**5,716**	**6,307**	**10,666**	**26,275**

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	6	402	598	32		1,038
Chenin blanc			3		2	5
Fiano				24		24
Marsanne				5	10	15
Muscat à Petits Grains Blancs		55	64			119
Pinot Gris/Grigio		34	77	22		133
Prosecco			0			0
Riesling		297	6	11	2	316
Roussanne				12	8	20
Sauvignon Blanc		3	192	9		204
Semillon	41	330	159	7	18	555
Vermentino		56		14		70
Viognier			203	7	1	211
Other white		11	34	19	2	65
White Total	**47**	**1,188**	**1,336**	**162**	**43**	**2,776**
Total purchased	**66**	**4,754**	**7,051**	**6,469**	**10,710**	**29,051**

Barossa Valley

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

** Includes Barossa zone other – 208 hectares (red)*

	Area (hectares)					
Variety	**Pre-2021**	**2021**	**2022**	**2023**	**Total area (Ha)**	**% planted in 2023**
Red winegrapes						
Aglianico	2	1	0	0	3	0%
Alicante Bouschet	16	0	0	0	16	0%
Barbera	3	0	0	0	3	0%
Cabernet Franc	24	0	0	0	24	0%
Cabernet Sauvignon	1,663	17	1	1	1,682	0%
Carignan	8	0	0	0	8	0%
Cinsault	6	0	0	0	6	0%
Durif (Petite Sirah)	20	0	0	0	20	0%
Graciano	7	0	0	0	7	0%
Grenache	695	24	5	24	748	3%
Malbec	27	0	0	0	27	0%
Mataro (Mourvedre)	311	4	4	12	330	4%
Merlot	213	0	0	0	213	0%
Meunier (Pinot Meunier)	2	0	0	0	2	0%
Montepulciano	16	0	0	0	16	0%
Muscat A Petit Grains Rouge	2	0	0	0	2	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	29	0	0	0	29	0%
Sangiovese	27	0	0	4	31	13%
Saperavi	5	1	0	0	6	0%
Shiraz	7,622	57	26	24	7,729	0%
Tannat	2	0	0	0	2	0%
Tempranillo	78	0	0	2	79	3%
Touriga	17	0	0	0	17	0%
Zinfandel	13	0	0	0	13	0%
Other Red	34	2	0	0	36	0%
Red winegrapes Total	**10,871**	**105**	**36**	**66**	**11,079**	**1%**

Source: Vinehealth Australia

Barossa Valley

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

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

	Area (hectares)					
Variety	**Pre-2021**	**2021**	**2022**	**2023**	**Total area (Ha)**	**% planted in 2023**
White winegrapes						
Chardonnay	228	0	0	0	228	0%
Chenin Blanc	11	0	0	0	11	0%
Fiano	5	0	0	0	5	0%
Grenache Blanc	3	0	2	0	5	0%
Marsanne	9	0	0	0	9	0%
Muscadelle (Tokay)	11	0	0	0	11	0%
Muscat A Petit Grains Blanc (White Frontignac)	38	0	0	0	38	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	116	0	0	0	116	0%
Roussanne	3	0	0	0	4	0%
Sauvignon Blanc	34	0	0	0	34	0%
Semillon	225	0	0	0	225	0%
Traminer (Gewurztraminer)	4	0	0	0	4	0%
Trebbiano	1	0	0	0	1	0%
Vermentino	8	0	0	0	8	0%
Viognier	41	0	0	0	41	0%
Other White	14	0	2	0	16	0%
White winegrapes Total	**768**	**0**	**5**	**0**	**773**	**0%**
Unknown variety	77	0	0	0	77	0%
Multi-purpose red	1	0	0	0	1	0%
Multi-purpose white	0	0	0	0	0	
Table red	0	0	0	0	0	
Total area	**11,718**	**106**	**41**	**66**	**11,930**	**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 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 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

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 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