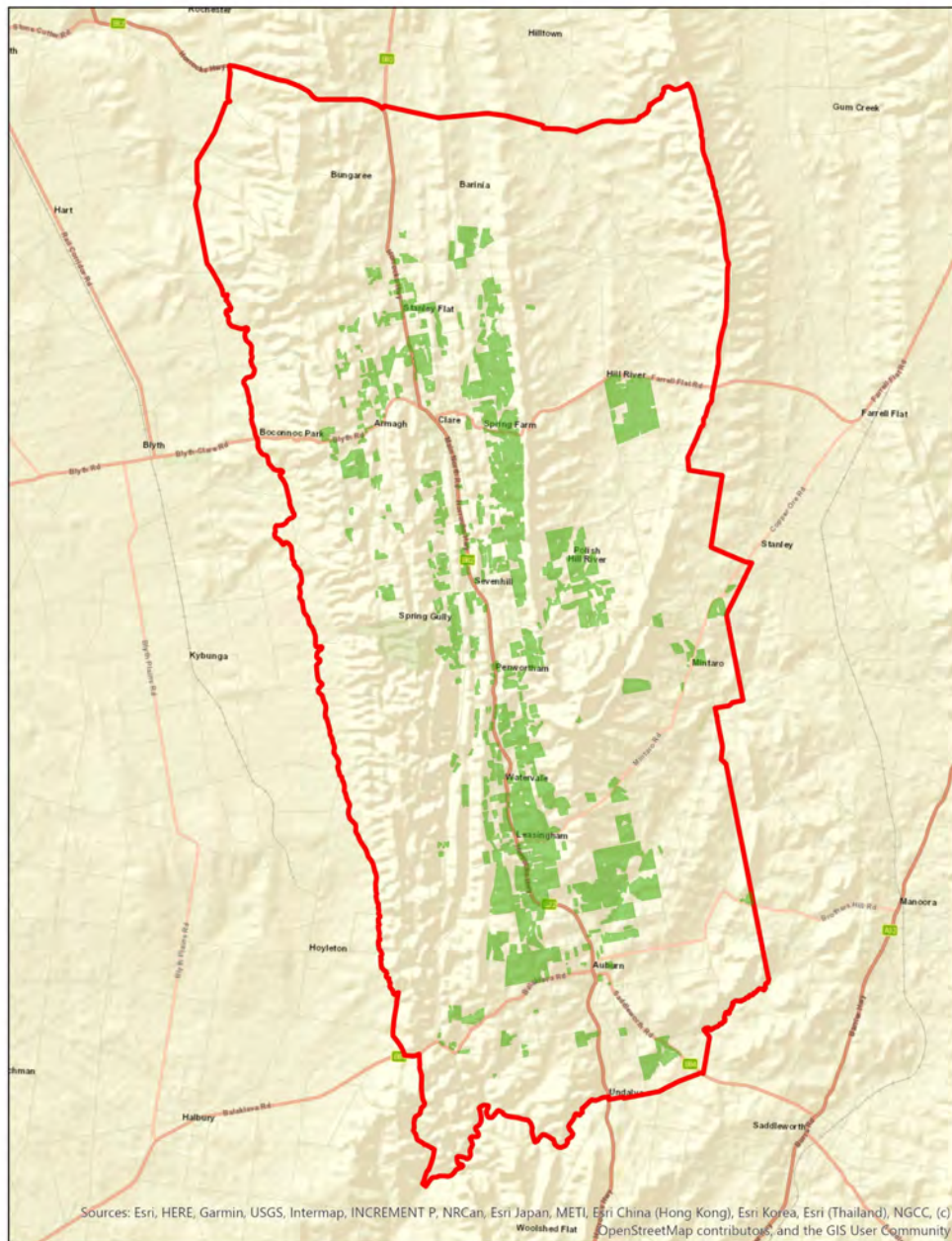


SA Winegrape Crush Survey 2021

Regional Summary Report

Clare Valley Wine Region

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Clare Valley
Wine Region



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Clare Valley

Vintage overview

VINTAGE REPORT

The 2021 vintage has been described by local winemakers as classic Clare with cool and dry conditions producing solid yields and fruit with great varietal character and natural acidity.

Good late-winter and early-spring rains led to an even budburst, good early canopy growth and contributed to mitigating frost damage. Dry conditions prevailed from November onwards, with rainfall well below average for the remainder of the growing season.

Weather conditions from mid to late November were ideal for flowering and good fruit set was achieved. Bunch number, bunch size and berry size were higher than crop estimates in most varieties, with overall yields the best since 2018 with early indications that total yield for the region is slightly below average.

Riesling bunch and berry sizes were lower than average which reduced yields of this variety. In comparison, yields of the red varieties have rebounded significantly this year, following extremely low yields during the drought years.

Low disease pressure continued all season, with wineries reporting spray programs with as few as four applications. The cool growing season, with only one day of real heat in late January, resulted in minimal sunburn. While the growing season was mainly dry, there was a small rain event which caused some minor split and shrivel, mainly in the Riesling.

Despite the lack of international winery workers this year and challenges recruiting vintage workers, wineries did not report shortages in staffing. This was aided by the spread-out nature of the vintage with some wineries operating on only one shift for the whole vintage.

*Anna Baum, Executive Officer
Clare Valley Wine & Grape Association*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Clare Valley winegrapes was 19,857 tonnes, up by 66 per cent on the 2020 crush of 11,946 tonnes and almost identical to the 5-year average of 19,847 tonnes (2016–2020).

There were 44 respondents to the survey who reported crushing grapes from the Clare Valley in 2021, compared with 42 in 2020.

The total estimated value of winegrapes in 2021 was just over \$31 million compared with \$19 million in 2020. The higher production was partly offset by a small decrease in the average purchase value of grapes, which was down by 4 per cent from \$1562 in 2020 to \$1503 per tonne.

The average value of red varieties declined overall by 10 per cent, driven by Shiraz, which was down by 10 per cent to \$1773 per tonne, while Cabernet Sauvignon decreased by 8 per cent to \$1604 per tonne. In the whites, Riesling was up by 3 per cent to \$1449 per tonne, Pinot Gris/Grigio increased by 2 per cent to \$1297 per tonne and Chardonnay increased by 1 per cent to \$1045 per tonne.

The price dispersion data shows a small downward shift in prices paid, with 10 per cent of grapes being purchased at \$2000 per tonne and above, compared with 17 per cent in 2020.

According to Vinehealth Australia data, the total vineyard area in the Clare Valley as at 30 April 2021 was 5052 hectares, almost identical to the 2020 figure, but about 150 hectares less than it was in 2016.

There were 65 hectares of new vines planted in the region in the 2020-21 season (including top-working and replacements), with two-thirds being Shiraz. There were 9 hectares of Grenache planted – the first since before 2018 – increasing the area of this variety by 12 per cent.

Clare Valley

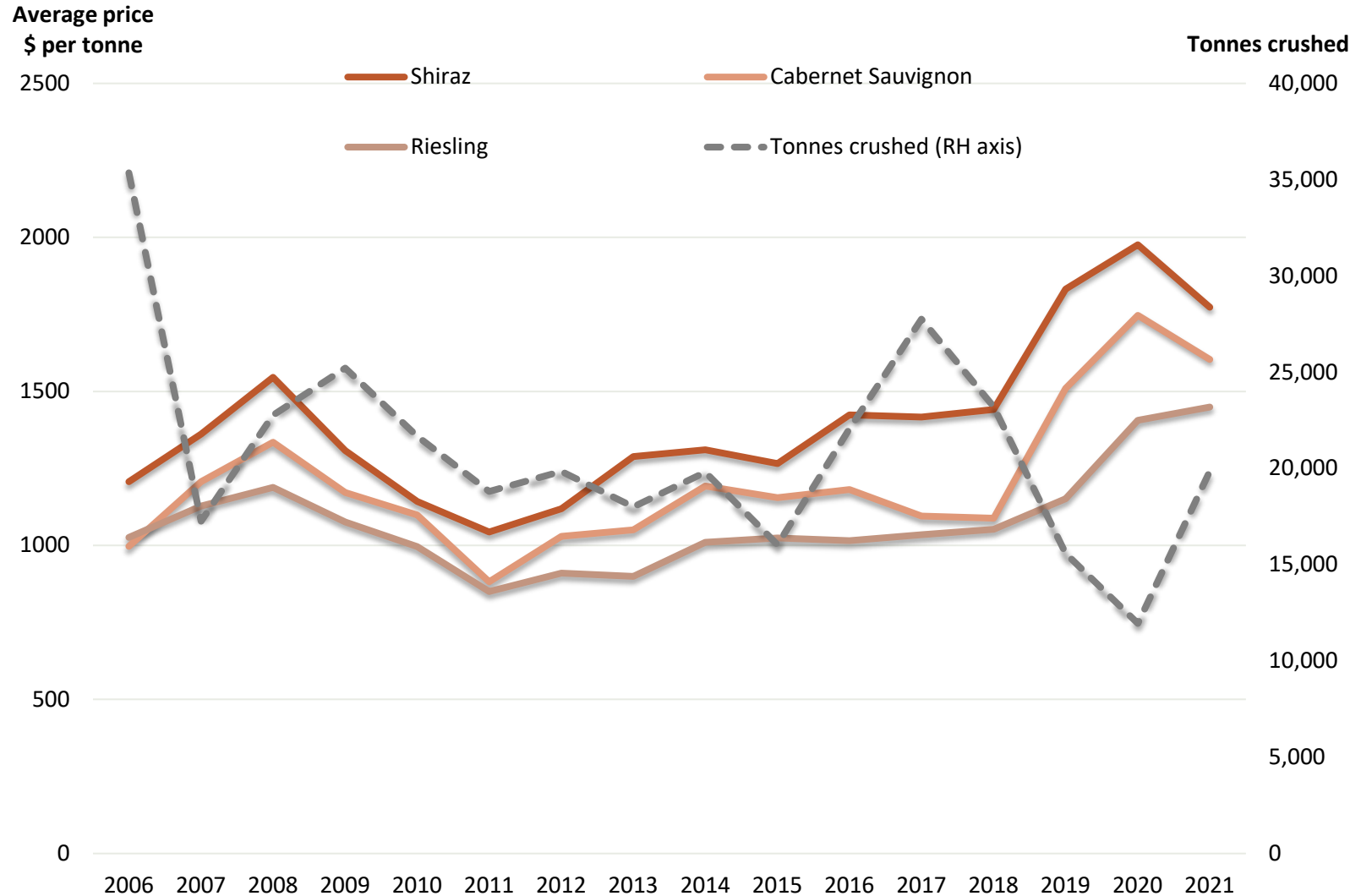
Winegrape intake summary table

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	% change in average value	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Total value all grapes
Red								
Barbera					8	100%	8	\$13,919
Cabernet Franc	4	\$5,746	\$1,466	0%	24	86%	28	\$41,323
Cabernet Sauvignon	973	\$1,560,292	\$1,604	-8%	2,827	74%	3,800	\$6,094,702
Graciano					9	100%	9	\$18,127
Grenache	39	\$81,074	\$2,100	46%	181	82%	219	\$460,560
Malbec	104	\$171,823	\$1,653	6%	222	68%	326	\$539,537
Mataro/Mourvedre	105	\$199,358	\$1,893	1%	92	47%	198	\$374,275
Merlot	560	\$576,058	\$1,028	-4%	611	52%	1,171	\$1,204,521
Montepulciano	4				10	72%	14	\$27,120
Muscat à petits grains rouges					6	100%	6	\$8,140
Nebbiolo					6	100%	6	\$12,731
Nero d'Avola					6	100%	6	\$11,870
Petit Verdot					71	100%	71	\$68,153
Pinot Noir					39	100%	39	\$76,678
Ruby Cabernet					8	100%	8	\$8,090
Sangiovese	67	\$81,177	\$1,219	12%	160	71%	226	\$275,912
Shiraz	2,290	\$4,059,511	\$1,773	-10%	5,302	70%	7,592	\$13,460,097
Tempranillo	68	\$86,009	\$1,260	-8%	108	61%	176	\$222,052
Touriga Nacional					20	100%	20	\$37,864
Other red	2				17	91%	18	\$27,285
Red Total	4,215	\$6,831,622	\$1,621	-10%	9,726	70%	13,942	\$22,982,956
White								
Chardonnay	287	\$299,329	\$1,045	1%	170	37%	457	\$477,141
Fiano	21				34	61%	55	\$99,467
Gewürztraminer	76	\$79,850	\$1,056	0%	53	41%	129	\$136,073
Pinot Gris/Grigio	129	\$167,886	\$1,297	2%	346	73%	476	\$617,154
Riesling	2,375	\$3,440,921	\$1,449	3%	1,947	45%	4,321	\$6,261,718
Sauvignon Blanc					28	100%	28	\$33,378
Semillon	228	\$157,567	\$691	-4%	37	14%	265	\$183,399
Verdelho					6	100%	6	\$6,145
Vermentino	5				7	61%	12	\$16,184
Viognier					54	100%	54	\$75,812
Other white					112	100%	112	\$132,033
White Total	3,120	\$4,190,258	\$1,343	-1%	2,795	47%	5,915	\$8,038,503
Grand Total	7,335	\$11,021,880	\$1,503	-4%	12,522	63%	19,857	\$31,021,459

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

Clare Valley

Historical weighted average price vs tonnes crushed



Clare Valley

Price dispersion – purchased grapes

Varieties	Tonnes purchased in each price segment					Total tonnes purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Cabernet Franc			3	1		4
Cabernet Sauvignon			237	630	106	973
Grenache				20	19	39
Malbec			30	41	32	104
Mataro/Mourvedre				72	33	105
Merlot			560			560
Montepulciano					4	4
Sangiovese			67			67
Shiraz			253	1,621	416	2,290
Tempranillo			53	16		68
Other red				2		2
Red Total			1,203	2,403	609	4,215
White						
Chardonnay	2		284			287
Fiano				21		21
Gewürztraminer			67	9		76
Pinot Gris/Grigio			129			129
Riesling		17	1,330	917	109	2,374
Semillon	120	56	48	4		228
Vermentino			5			5
White Total	122	74	1,863	951	109	3,119
Total purchased	122	74	3,066	3,354	719	7,335

Clare Valley

Current plantings by variety and year planted

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Cabernet Franc	16	0	2	0	18	0%
Cabernet Sauvignon	1,066	12	19	0	1,097	0%
Grenache	67	0	0	9	76	12%
Malbec	83	1	0	0	84	0%
Mataro (Mourvedre)	34	0	0	0	34	0%
Merlot	238	0	0	0	238	0%
Nebbiolo	3	0	0	0	3	0%
Nero d'Avola	5	0	0	0	5	0%
Petit Verdot	14	0	0	0	14	0%
Pinot Noir	8	0	0	0	8	0%
Sangiovese	25	10	0	0	35	0%
Shiraz	1,839	29	33	43	1,944	2%
Tempranillo	38	0	0	0	38	0%
Touriga	3	0	0	0	3	0%
Zinfandel	3	0	0	0	3	0%
Other Red	13	2	1	1	17	6%
Total red varieties	3,455	54	55	53	3,617	1%
White winegrapes						
Riesling	1,044	0	7	9	1,060	1%
Chardonnay	137	0	0	0	137	0%
Fiano	9	0	0	0	9	0%
Muscat Gordo Blanco	1	0	0	1	2	50%
Pinot Gris	57	1	6	0	64	0%
Sauvignon Blanc	14	0	0	0	14	0%
Semillon	74	0	0	0	74	0%
Traminer (Gewurztraminer)	21	0	0	0	21	0%
Vermentino	5	0	0	0	5	0%
Viognier	10	0	0	0	10	0%
Other White	24	1	0	2	27	7%
Total white varieties	1,396	2	13	12	1,423	1%
Unknown variety	11	0	0	0	11	0%
Rootstock Block	1	0	0	0	1	0%
Table grapes	0	0	0	0	0	0%
Total all varieties	4,863	56	68	65	5,052	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 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 2021).

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 not collected by the Australian National Vintage Survey. The information 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 2021 and include all plantings from the 2020–21 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 topworked, 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

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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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