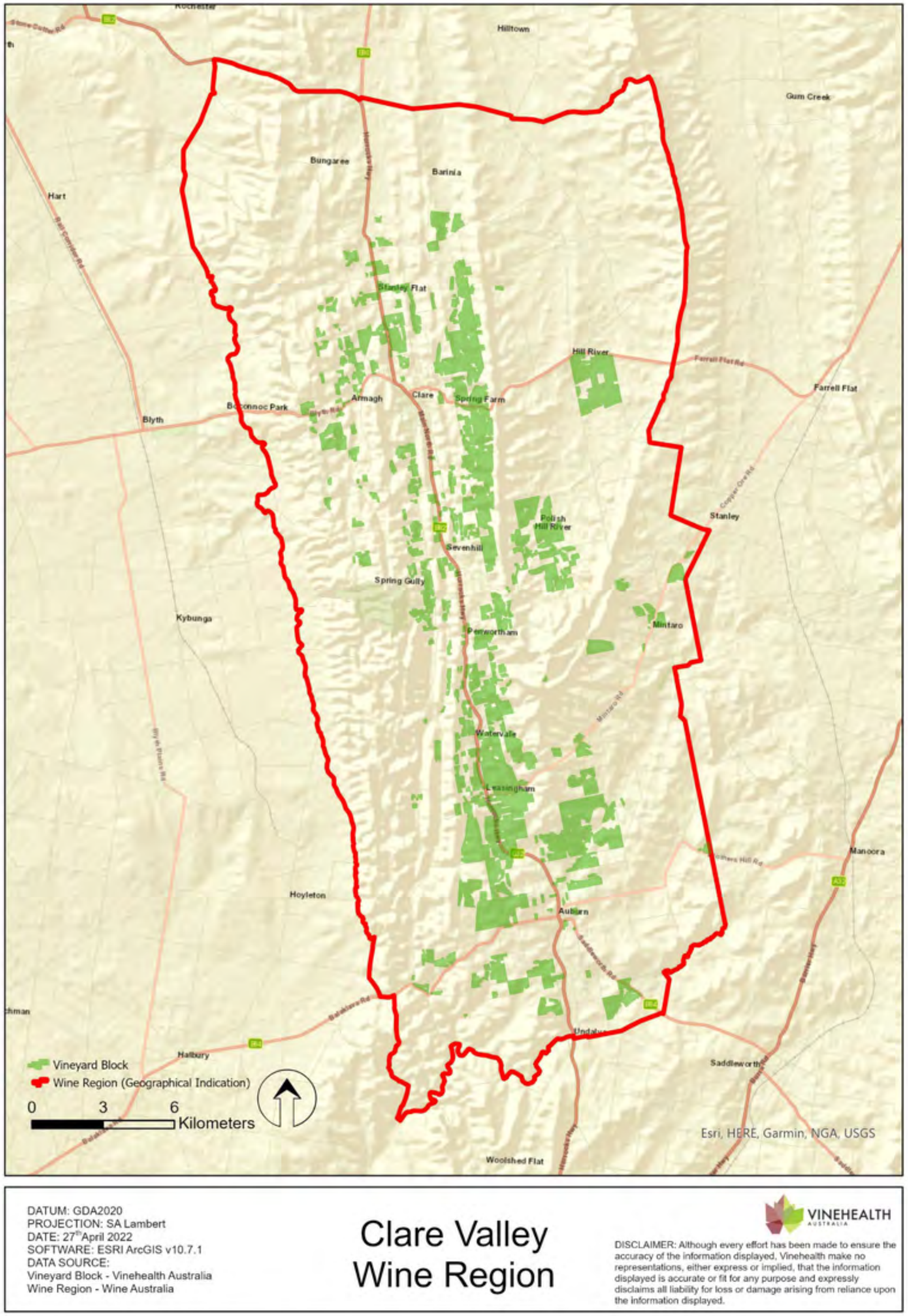


SA Winegrape Crush Survey 2024

Regional Summary Report

Clare Valley Wine Region

Wine Australia July 2024

Clare Valley

Vintage overview

VINTAGE REPORT

Despite some challenges for growers this season, the 2024 vintage has produced wines with freshness, vibrancy and intensity of flavour.

The season began with a relatively dry winter and early spring, leading to an early budburst and flowering, followed by a wet period up until Christmas. This rain topped up the soil moisture profile ahead of a dry summer and autumn, providing close-to-perfect ripening weather with low disease pressure.

Riesling ripened relatively early and displays classic restraint and varietal precision, with red varieties benefiting from good levels of hang time.

While yields are down across the board this season, there are some solid Riesling yields in areas that escaped the frost which occurred in late October.

The regional crush is expected to be down on average due in part to the frost event which significantly impacted the southern end of the valley, and in part to the low demand for fruit.

Winemakers in the Clare Valley are pleased with the quality of both whites and reds as the 2024 wines begin to take shape.

Growers look forward to soaking winter rains to set up Clare Valley vineyards for the year ahead.

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

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Clare Valley winegrapes in 2024 was 16,498 tonnes, down by 28 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Clare Valley has been 19,321 tonnes, making this year's crush 15 per cent below the five-year average.

There were 45 respondents to the survey who reported crushing grapes from the Clare Valley in 2024, compared with 49 in 2023.

The total value of winegrapes in 2024 was $26 million, compared with $39 million in 2023, a decrease of 33 per cent. The overall average value declined by 8 per cent from $1,688 in 2023 to $1,558 per tonne.

Riesling overtook Shiraz as the largest variety for the first time in over a decade as the crush of Shiraz fell by nearly half. Riesling also recorded a 3 per cent increase in average price, to $1,645 per tonne, whereas the average value for the major red varieties decreased, with Shiraz down by 14 per cent to $1,610 per tonne and Cabernet Sauvignon down by 18 per cent to $1,578 per tonne. This led to Riesling having the highest average value of the major varieties for the first time since 2005.

The price dispersion data shows a downward shift in prices paid, with 8 per cent of all grapes being purchased at $2000 per tonne or above compared with 22 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in the Clare Valley as at 30 April 2024 was 4,963 hectares, a decrease of 191 hectares compared with the previous year and 53 less than it was in 2019. The average vineyard size in Clare Valley is 15 hectares, compared with the state average of 16.1 hectares.

There were 23 hectares of new vines planted in the region in the 2023–24 season (including top-working and replacements), compared with 65 in the previous season, with 8 hectares (one-third) being Riesling.

Clare Valley

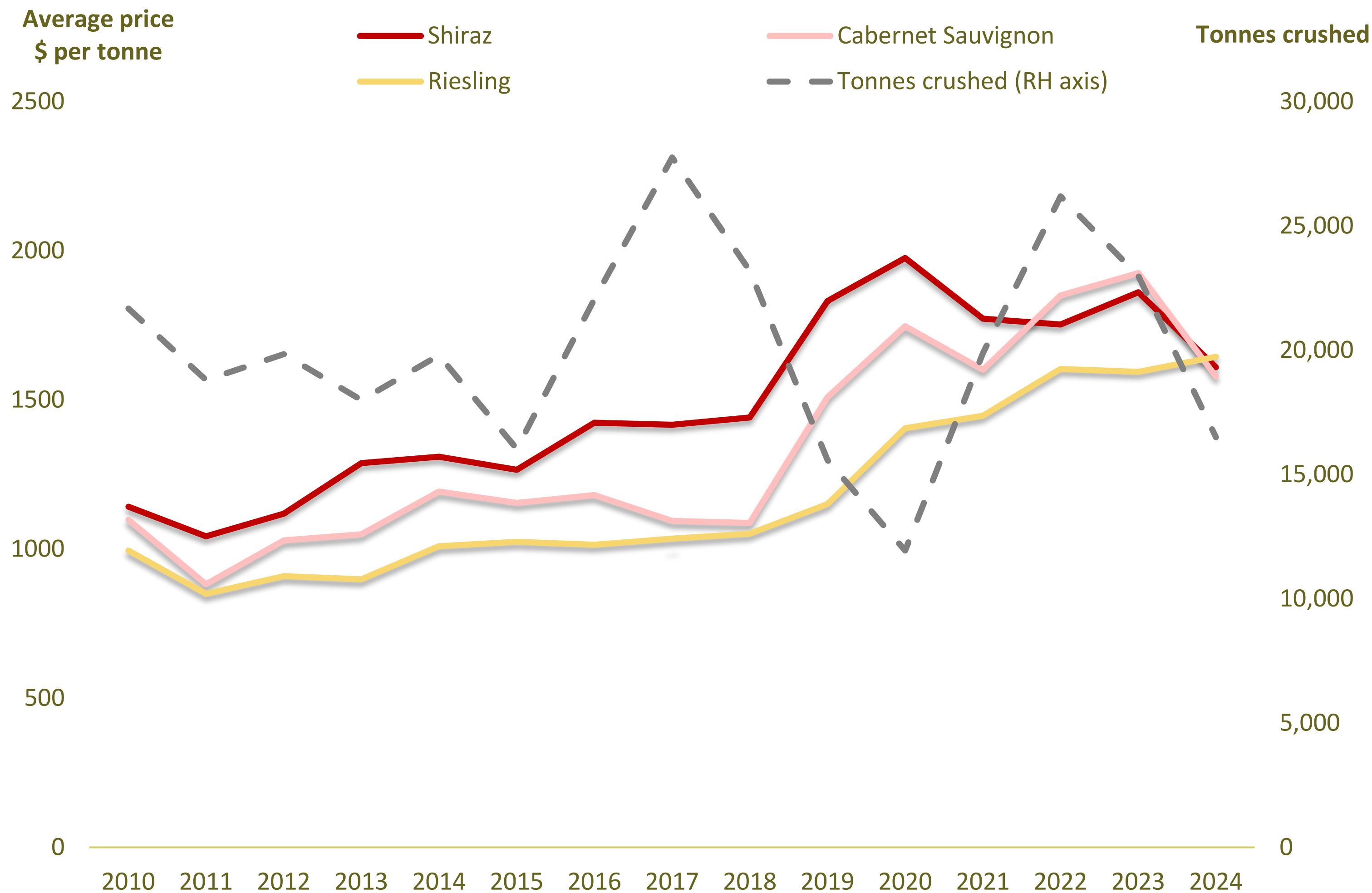
Winegrape intake summary table

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	6				7	53%	13	$19,215
Cabernet Franc	17	$25,511	$1,465	6%	14	44%	31	$45,906
Cabernet Sauvignon	828	$1,306,868	$1,578	-18%	914	52%	1,742	$2,749,324
Grenache	117	$198,975	$1,707	1%	220	65%	337	$574,497
Malbec	111	$174,677	$1,570	4%	172	61%	283	$444,724
Mataro/Mourvedre	47	$86,514	$1,846	-2%	87	65%	134	$247,756
Merlot	461	$545,110	$1,183	14%	84	15%	545	$644,392
Montepulciano					8	100%	8	$16,642
Nebbiolo					3	100%	3	$7,957
Nero d'Avola					6	100%	6	$10,591
Petit Verdot	73						73	$118,120
Pinot Noir	3						3	$3,486
Sangiovese	95	$130,756	$1,381	11%	180	66%	275	$379,698
Shiraz	1,923	$3,095,567	$1,610	-14%	2,613	58%	4,536	$7,301,467
Tempranillo	82	$99,390	$1,206	-18%	94	53%	176	$212,467
Touriga Nacional					15	100%	15	$25,129
Other red					6	100%	6	$10,391
Red Total	**3,763**	**$5,794,001**	**$1,540**	**-15%**	**4,423**	**54%**	**8,186**	**$12,811,762**
White								
Chardonnay	372	$436,685	$1,173	12%	154	29%	526	$617,353
Fiano	38	$64,005	$1,668	0%	119	76%	158	$262,926
Gewürztraminer	81	$90,478	$1,121	-9%	13	14%	94	$104,933
Pinot Gris/Grigio	196	$288,074	$1,473	3%	392	67%	588	$865,747
Riesling	3,658	$6,017,355	$1,645	3%	2,976	45%	6,634	$10,913,318
Sauvignon Blanc	7				21	76%	28	$19,415
Semillon	95	$96,420	$1,015	3%	35	27%	130	$132,461
Verdelho					5	100%	5	$6,256
Vermentino	15						15	$22,095
Viognier					27	100%	27	$38,483
Other white	2				105	98%	107	$119,085
White Total	**4,463**	**$7,022,603**	**$1,573**	**4%**	**3,848**	**46%**	**8,312**	**$13,102,073**
Grand Total	**8,226**	**$12,816,604**	**$1,558**	**-8%**	**8,272**	**50%**	**16,498**	**$25,913,834**

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

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Barbera				6		6
Cabernet Franc			11	4	2	17
Cabernet Sauvignon			83	696	50	828
Grenache			14	73	29	117
Malbec			23	88		111
Mataro/Mourvedre			14	20	13	47
Merlot		6	455			461
Petit Verdot			2	71		73
Pinot Noir			3			3
Sangiovese			38	57		95
Shiraz	29	72	246	1,466	110	1,923
Tempranillo	21		30	31		82
Red Total	**50**	**79**	**919**	**2,511**	**204**	**3,763**
White						
Chardonnay			372			372
Fiano				27	12	38
Gewürztraminer			70	11		81
Pinot Gris/Grigio			143	37	16	196
Riesling		8	857	2,380	413	3,658
Sauvignon Blanc		7				7
Semillon		34	61			95
Vermentino				15		15
Other white				2		2
White Total		**48**	**1,503**	**2,471**	**441**	**4,463**
Total purchased	**50**	**127**	**2,422**	**4,983**	**645**	**8,226**

Clare Valley

Current plantings by variety and year planted

Variety	Area (hectares) Pre-2021	2021	2022	2023	Total area (Ha)	% planted in 2023
Red winegrapes						
Cabernet Franc	13	0	0	0	13	0%
Cabernet Sauvignon	1,038	10	0	3	1,050	0%
Carmenere	4	0	0	0	4	0%
Grenache	71	6	1	1	78	1%
Malbec	83	0	7	0	90	0%
Mataro (Mourvedre)	33	0	0	0	33	0%
Merlot	196	0	0	0	196	0%
Montepulciano	2	0	0	0	2	0%
Nero d'Avola	7	0	0	0	7	0%
Petit Verdot	9	0	0	0	9	0%
Sangiovese	35	1	9	0	45	0%
Shiraz	1,914	21	8	0	1,944	0%
Tempranillo	32	2	0	0	34	0%
Touriga	3	0	0	0	3	0%
Zinfandel	3	0	0	0	3	0%
Other Red	25	0	0	0	25	0%
Red winegrapes Total	**3,467**	**41**	**25**	**4**	**3,537**	**0%**
White winegrapes						
Chardonnay	90	0	0	0	90	0%
Fiano	10	4	22	2	38	5%
Gruner Veltliner	2	0	0	2	4	50%
Muscat Gordo Blanco	2	0	0	0	2	0%
Pinot Gris	64	3	4	4	74	5%
Riesling	1,049	8	12	8	1,077	1%
Sauvignon Blanc	14	0	0	0	14	0%
Semillon	51	0	0	0	51	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	22	2	2	2	28	7%
White winegrapes Total	**1,339**	**17**	**40**	**19**	**1,414**	**1%**
Unknown variety	10	0	0	0	10	0%
Rootstock	1	0	0	0	1	0%
Table red	0	0	0	0	0	
Table white	0	0	0	0	0	
All varieties Total	**4,817**	**58**	**65**	**23**	**4,963**	**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