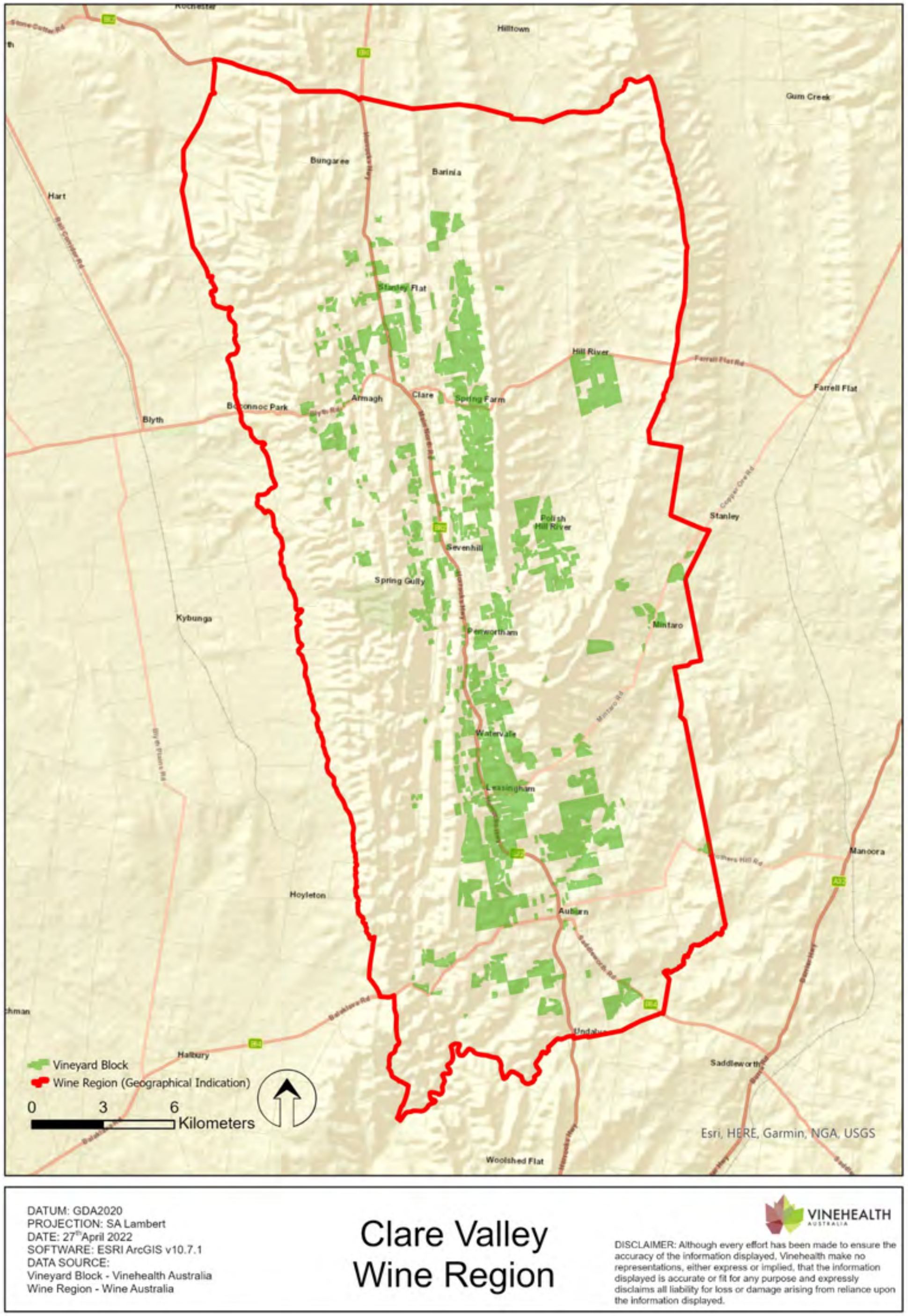


SA Winegrape Crush Survey 2022

Regional Summary Report

Clare Valley Wine Region

Wine Australia July 2022

Clare Valley

Vintage overview

VINTAGE REPORT

This year the Clare Valley celebrates the 21st birthday of the screw cap closure, an innovation pioneered by the region.

The 2022 vintage brings good news for wineries and grape growers after a hard year for businesses, with quality consistently high across both red and white varieties in 2022, a vintage which also recorded strong yields.

The season in 2021 began with a dry cool autumn which led into good winter rains and above average spring rainfall. The timing of this rain led to decent soil moisture during the growing season even though the annual rainfall was down on average.

The cool wet spring delayed budburst slightly and, combined with a cool summer, led to one of the latest starts to the vintage in more than a decade. Flavour ripeness developed before Baume specifications necessitated picking and wineries had time to process the fruit without the capacity issues that occur in a compressed vintage.

A couple of frosty nights in mid-October caused some isolated damage and wet conditions through flowering in November led to poor fruit set in some varieties and blocks. But overall, the region escaped damage from fire and hail and as a result reported a total yield that was 10-15 percent up on last year.

Cool, dry weather through summer and early autumn provided favourable ripening conditions, producing fruit with good natural acid levels and full varietal flavour.

The 2022 Riesling is looking exceptional, and red varieties are showing a combination of quality and yield not seen for several years, with Cabernet Sauvignon looking like a real standout.

Anna Baum, Executive Officer
Clare Valley Wine & Grape Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Clare Valley winegrapes was 26,194 tonnes, up by 32 per cent on the 2021 crush of 14,427 tonnes and 33 per cent above the 5-year average of 19,675 tonnes (2017–2021). It was the second-largest crush in the past 10-year period.

There were a record 52 respondents to the survey who reported crushing grapes from the Clare Valley in 2022, compared with 45 in 2021.

The total estimated value of winegrapes in 2022 was just over $43 million compared with $31 million in 2021 (an increase of 39 per cent). The higher production was enhanced by a 9 per cent increase in the average purchase value of grapes, which increased from $1502 in 2021 to $1633 per tonne.

The biggest increases in average value were for Cabernet Sauvignon (up 16 per cent to $1850 per tonne and Riesling (up 11 per cent to $1604 per tonne). Shiraz declined by 1 per cent to $1753 per tonne. The average value for Cabernet Sauvignon was higher than that of Shiraz for the first time.

The price dispersion data reflects this upward shift in prices paid, with 24 per cent of grapes being purchased at $2000 per tonne and above, compared with 10 per cent in 2021.

According to Vinehealth Australia data, the total vineyard area in the Clare Valley as at 30 April 2022 was 5189 hectares, an increase of nearly 200 hectares compared with the previous year and almost identical to the area in 2017.

There were 38 hectares of new vines planted in the region in the 2021-22 season (including top-working and replacements), with two-thirds being Shiraz.

Clare Valley

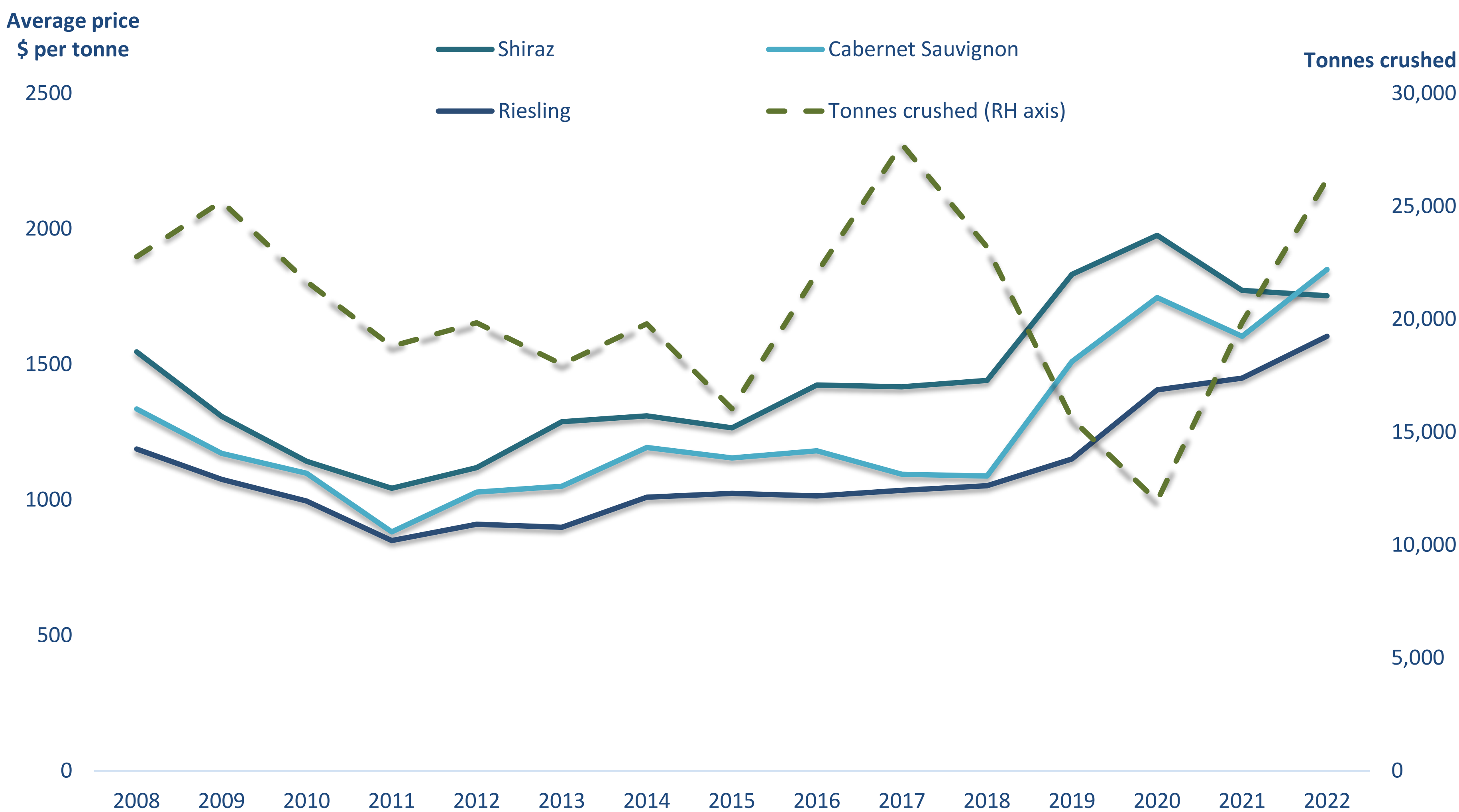
Winegrape intake summary table

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					10	100%	10	$20,298
Cabernet Franc	9	$13,850	$1,537	5%	28	76%	37	$56,635
Cabernet Sauvignon	2,702	$5,000,024	$1,850	16%	2,809	51%	5,511	$10,197,444
Graciano					10	100%	10	$19,351
Grenache	70	$140,822	$2,000	-5%	319	82%	389	$778,771
Malbec	192	$316,888	$1,651	-0%	352	65%	543	$897,383
Mataro/Mourvedre	116	$220,163	$1,893	0%	116	50%	232	$439,595
Merlot	339	$343,475	$1,014	-1%	647	66%	986	$999,409
Montepulciano	5				15	76%	20	$39,084
Muscat à Petits Grains Rouges	15				0	2%	16	$5,439
Nero d'Avola					9	100%	9	$18,439
Petit Verdot	3				77	96%	80	$116,019
Pinot Noir					26	100%	26	$57,449
Sangiovese	48	$59,497	$1,234	1%	191	80%	240	$295,582
Shiraz	3,516	$6,165,045	$1,753	-1%	5,618	62%	9,134	$16,016,441
Tempranillo	73	$79,212	$1,079	-14%	90	55%	163	$175,878
Touriga Nacional					21	100%	21	$41,303
Other red					22	100%	22	$55,008
Red Total	**7,089**	**$12,358,077**	**$1,743**	**8%**	**10,361**	**59%**	**17,450**	**$30,229,527**
White								
Chardonnay	434	$397,343	$915	-12%	192	31%	627	$573,233
Fiano	9				32	77%	42	$69,836
Gewürztraminer	80	$83,705	$1,048	-1%	18	18%	98	$102,303
Pinot Gris/Grigio	224	$268,370	$1,199	-8%	307	58%	531	$637,013
Riesling	3,696	$5,930,113	$1,604	11%	3,209	46%	6,906	$11,079,300
Sauvignon Blanc	3				39	94%	42	$41,800
Semillon	219	$143,826	$656	-5%	76	26%	295	$193,756
Verdelho					4	100%	4	$4,814
Vermentino					22	100%	22	$31,108
Viognier					38	100%	38	$54,522
Other white	12				128	92%	140	$165,598
White Total	**4,677**	**$6,853,566**	**$1,465**	**9%**	**4,067**	**47%**	**8,744**	**$12,953,282**
Grand Total	**11,766**	**$19,211,643**	**$1,633**	**9%**	**14,427**	**55%**	**26,194**	**$43,182,809**

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 segment <$600	$600-<$900	$900-<$1500	$1500-<$2000	>$2000	Total purchased
Red						
Cabernet Franc			8		1	9
Cabernet Sauvignon	165		376	881	1,280	2,702
Grenache			10	18	43	70
Malbec			44	122	26	192
Mataro/Mourvedre			9	57	50	116
Merlot	69		269			339
Montepulciano					5	5
Muscat à Petits Grains Rouges	15					15
Petit Verdot			3			3
Sangiovese			45	3		48
Shiraz	86	106	488	1,647	1,189	3,516
Tempranillo	25		26	23		73
Red total	**361**	**106**	**1,277**	**2,752**	**2,593**	**7,089**
White						
Chardonnay	89		338	8		434
Fiano				9		9
Gewürztraminer			72	8		80
Pinot Gris/Grigio			201	17	6	224
Riesling			1,198	2,244	254	3,696
Sauvignon Blanc			3			3
Semillon	125	33	55		6	219
Other white			12			12
White total	**214**	**33**	**1,879**	**2,286**	**265**	**4,677**
Total purchased	**575**	**139**	**3,156**	**5,037**	**2,859**	**11,766**

Clare Valley

Current plantings by variety and year planted

	Area (hectares)					
Variety	**Pre-2019**	**2019**	**2020**	**2021**	**Total area (Ha)**	**% planted in 2021**
Red winegrapes						
Cabernet Franc	11	2	0	0	13	*0%*
Cabernet Sauvignon	1,042	42	0	0	1,084	*0%*
Grenache	65	0	9	3	77	*4%*
Malbec	84	0	0	0	84	*0%*
Mataro (Mourvedre)	34	0	0	0	34	*0%*
Merlot	225	0	0	0	225	*0%*
Nero d'Avola	2	2	2	0	6	*0%*
Petit Verdot	9	0	0	0	9	*0%*
Pinot Noir	8	0	0	0	8	*0%*
Sangiovese	34	0	1	1	36	*3%*
Shiraz	1,854	58	40	21	1,973	*1%*
Tempranillo	36	0	0	2	38	*5%*
Touriga	3	0	0	0	3	*0%*
Zinfandel	3	0	0	0	3	*0%*
Other Red	16	0	0	0	16	*0%*
Total red varieties	**3,426**	**104**	**52**	**27**	**3,609**	***1%***
White winegrapes						
Chardonnay	113	0	0	0	113	*0%*
Fiano	9	0	0	0	9	*0%*
Muscat Gordo Blanco	1	0	0	1	2	*50%*
Pinot Gris	60	6	0	2	68	*3%*
Riesling	1,041	4	9	6	1,060	*1%*
Sauvignon Blanc	14	0	0	0	14	*0%*
Semillon	61	0	0	0	61	*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	26	0	2	2	30	*7%*
Total white varieties	**1,361**	**10**	**11**	**11**	**1,393**	***1%***
Unknown variety	186	0	0	0	186	*0%*
Rootstock Block	1	0	0	0	1	*0%*
Total all varieties	**4,974**	**114**	**63**	**38**	**5,189**	***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

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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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