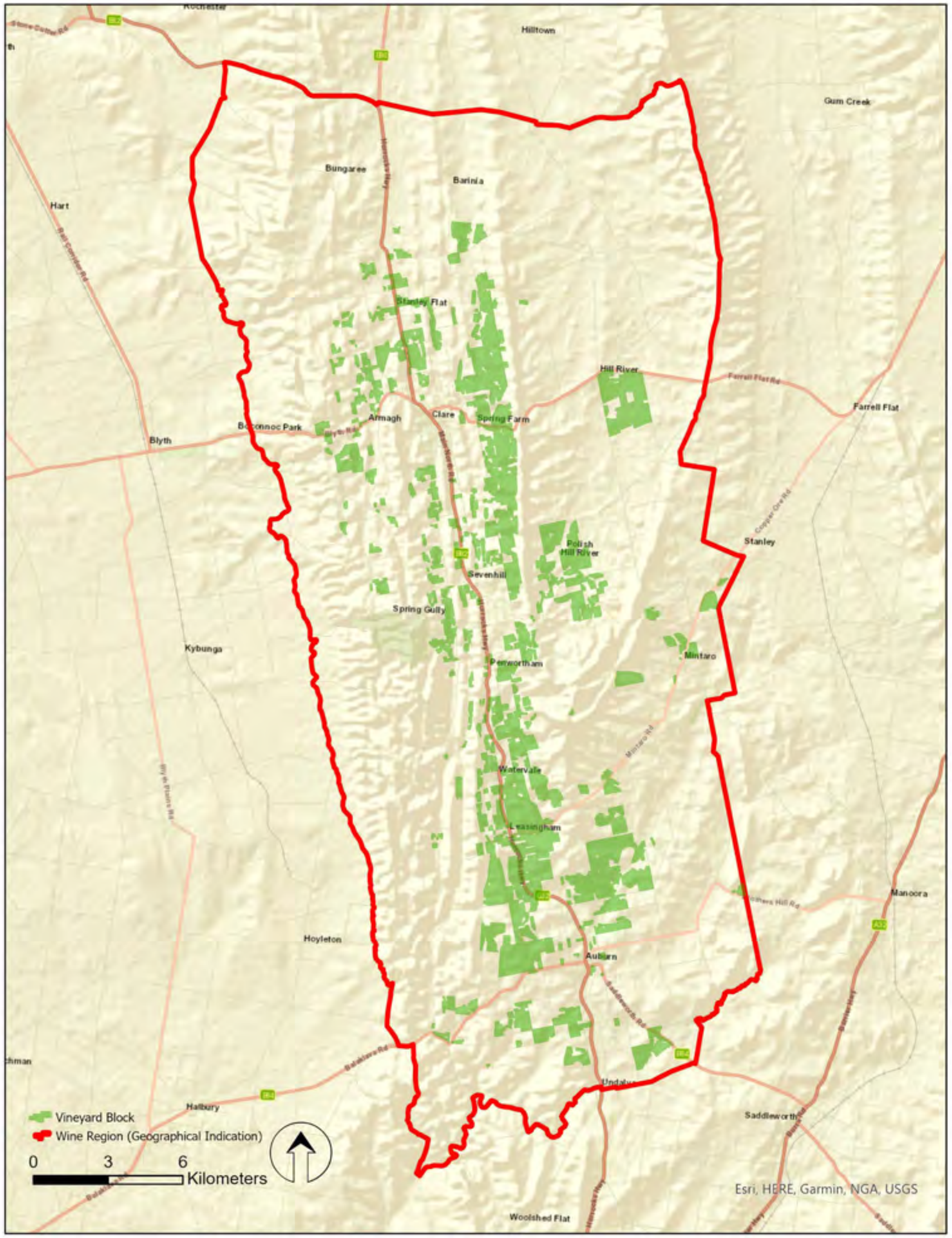

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 27th April 2022
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Clare Valley Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

Clare Valley Wine Region

Wine Australia July 2023

Clare Valley

Vintage overview

VINTAGE REPORT

Patience, crop management and keeping a watchful eye on the weather were the keys to success in vintage 2023.

The 2022 growing season was one with challenging conditions. The winter-spring period was the wettest since 2016, with close to 700mm falling in the second half of the year which, coupled with cool conditions in September and October, led to budburst being late for most varieties and slower than normal spring growth. Therefore, flowering was three weeks later than average, in early December rather than mid-November, and - reminiscent of the ‘old days’ - harvest did not begin until early March.

The wetter than average spring and early summer, along with some small hail flurries, made for increased disease pressure. Cool weather conditions and solid crops slowed ripening, but minimal rain from Christmas until the end of March kept any disease at bay and led to a sound harvest of pristine, quintessential Clare Valley Riesling, showing fantastic flavour ripeness and natural acidity.

Rain in April delayed the harvest of red varieties and increased disease pressure, especially for late Botrytis infection. Management of crops was challenging in the later part of the season with some of the heavier crops struggling to fully ripen and wineries leaving some of these hanging, rather than picking lower quality fruit.

Seasonal and market conditions have given winemakers the luxury of selecting the best parcels of red fruit which will result in some exceptional quality red wines, with Cabernet Sauvignon looking to be the standout. The long ripening period has led to complexity of flavours and has produced an elegant style of red wine for which the Clare Valley is known.

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

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Clare Valley winegrapes was 22,987 tonnes, down by 12 per cent on the 2022 crush of 26,194 tonnes and 19 per cent above the five-year average of 19,364 tonnes (2018–2022). It was the fourth-largest crush in the past 10-year period.

There were 49 respondents to the survey who reported crushing grapes from the Clare Valley in 2023, compared with 52 in 2022.

The total estimated value of winegrapes in 2023 was just under $39 million compared with $43 million in 2022 (a decrease of 10 per cent). The lower production was slightly offset by a 3 per cent increase in the average purchase value of grapes, which increased from $1633 in 2022 to $1688 per tonne.

The average value for the major red varieties increased, with Shiraz, the largest variety, up by 6 per cent to $1862 per tonne and Cabernet Sauvignon up 4 per cent to $1926 per tonne. The average value for Cabernet Sauvignon was higher than that of Shiraz for the second year in a row.

The price dispersion data reflects a small downward shift in prices paid, with 22 per cent of grapes being purchased at $2000 per tonne and above, compared with 24 per cent in 2022.

According to Vinehealth Australia data, the total vineyard area in the Clare Valley as at 30 April 2023 was 5154 hectares, a decrease of 35 hectares compared with the previous year and 94 hectares more than the total area in 2018.

There were 60 hectares of new vines planted in the region in the 2022-23 season (including top-working and replacements), with 22 hectares being Fiano (a 61 per cent increase in total area for this variety).

Clare Valley

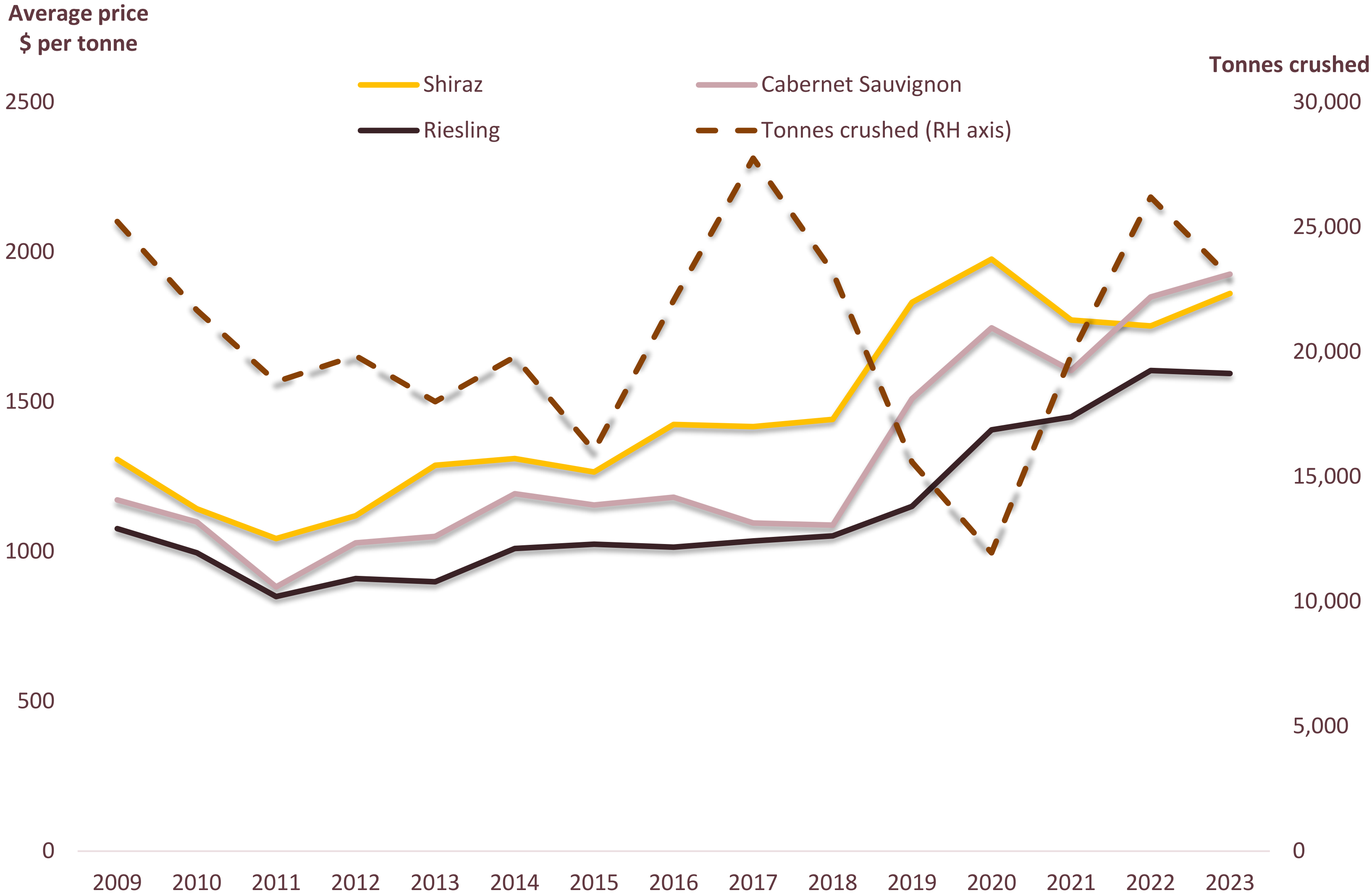
Winegrape intake summary table

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					11	100%	11	$23,251
Cabernet Franc	15	$20,915	$1,381	-10%	20	56%	35	$47,862
Cabernet Sauvignon	2,035	$3,918,539	$1,926	4%	1,857	48%	3,892	$7,495,049
Grenache	94	$158,191	$1,685	-16%	300	76%	394	$663,192
Malbec	129	$194,968	$1,511	-9%	216	63%	345	$521,810
Mataro/Mourvedre	103	$194,222	$1,892	-0%	33	24%	136	$257,121
Merlot	404	$419,272	$1,038	2%	393	49%	797	$827,425
Montepulciano					9	100%	9	$18,338
Nero d'Avola					9	100%	9	$17,650
Petit Verdot	61						61	$98,214
Pinot Noir					55	100%	55	$128,686
Sangiovese	84	$104,406	$1,247	1%	206	71%	289	$360,827
Shiraz	3,563	$6,630,733	$1,862	6%	4,385	55%	7,947	$14,792,716
Tempranillo	70	$102,856	$1,473	36%	104	60%	174	$256,351
Touriga Nacional					7	100%	7	$13,480
Other red					4	100%	4	$3,820
Red Total	**6,557**	**$11,842,316**	**$1,806**	**4%**	**7,609**	**54%**	**14,166**	**$25,525,794**
White								
Chardonnay	421	$439,726	$1,045	14%	222	35%	643	$671,837
Fiano	16				76	83%	92	$172,350
Gewürztraminer	78	$96,213	$1,231	17%	35	31%	113	$139,235
Pinot Gris/Grigio	232	$330,938	$1,424	19%	416	64%	648	$923,029
Riesling	3,643	$5,807,333	$1,594	-1%	3,248	47%	6,891	$10,984,627
Sauvignon Blanc					31	100%	31	$46,380
Semillon	93	$91,615	$989	51%	99	52%	191	$189,112
Verdelho					7	100%	7	$8,899
Vermentino					6	100%	6	$8,609
Viognier					65	100%	65	$94,412
Other white					133	100%	133	$153,290
White Total	**4,483**	**$6,795,160**	**$1,516**	**3%**	**4,338**	**49%**	**8,821**	**$13,391,791**
Grand Total	**11,040**	**$18,637,476**	**$1,688**	**3%**	**11,947**	**52%**	**22,987**	**$38,917,574**

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-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red					
Cabernet Franc		8	7		15
Cabernet Sauvignon		334	752	949	2,035
Grenache		37	37	21	94
Malbec		32	97		129
Mataro/Mourvedre		10	24	69	103
Merlot		404			404
Petit Verdot		2	59		61
Sangiovese		84			84
Shiraz	27	417	1,887	1,227	3,557
Tempranillo		28	42		70
Red Total	**27**	**1,355**	**2,904**	**2,265**	**6,551**
White					
Chardonnay		421			421
Fiano			16		16
Gewürztraminer		70	2	6	78
Pinot Gris/Grigio		175	45	12	232
Riesling	5	1,127	2,347	158	3,637
Semillon	22	71			93
White Total	**27**	**1,864**	**2,410**	**177**	**4,477**
Total purchased	**53**	**3,219**	**5,314**	**2,442**	**11,028**

Clare Valley

Current plantings by variety and year planted

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Franc	13	0	0	0	13	0%
Cabernet Sauvignon	1,105	8	0	0	1,113	0%
Grenache	61	9	4	1	75	1%
Malbec	83	0	0	7	90	8%
Mataro (Mourvedre)	33	0	0	0	33	0%
Merlot	220	0	0	0	220	0%
Montepulciano	1	1	0	0	2	0%
Nero D'Avola	5	2	0	0	7	0%
Petit Verdot	9	0	0	0	9	0%
Pinot Noir	8	0	0	0	8	0%
Sangiovese	34	1	2	9	46	20%
Shiraz	1,939	59	21	8	2,027	0%
Tempranillo	33	0	2	0	35	0%
Other Red	22	0	0	0	22	0%
Total red varieties	**3,566**	**80**	**29**	**25**	**3,700**	**1%**
White winegrapes						
Chardonnay	113	0	0	0	113	0%
Fiano	9	1	4	22	36	61%
Muscat Gordo Blanco	1	1	0	0	2	0%
Pinot Gris	67	0	2	4	73	5%
White winegrapes						
Riesling	1,050	12	7	7	1,076	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	2	3	2	33	6%
Total white varieties	**1,377**	**16**	**16**	**35**	**1,444**	**2%**
Unknown variety	9	0	0	0	9	0%
Rootstock Block	1	0	0	0	1	0%
Total all varieties	**4,953**	**96**	**45**	**60**	**5,154**	**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 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

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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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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

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GI maps – Vinehealth Australia