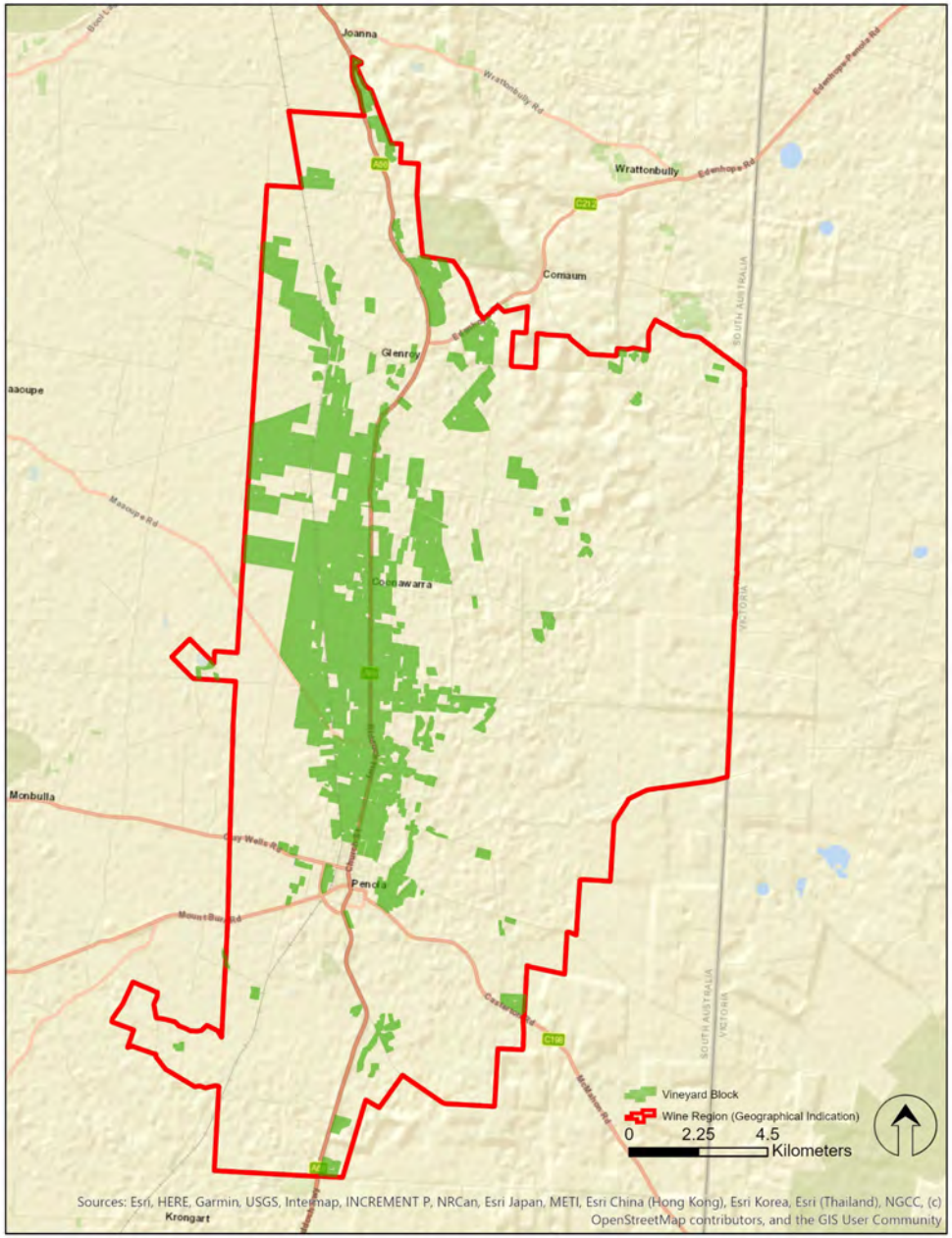

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 29th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Coonawarra Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2022

Regional Summary Report

Coonawarra Wine Region

Wine Australia July 2022

Coonawarra

Vintage overview

VINTAGE REPORT

Coonawarra experienced another strong vintage in 2022, with stable conditions, high-quality fruit and moderate to good yields.

Coonawarra received close to the long-term average rainfall throughout winter. Overall, it was a mild growing season, with no prolonged heat waves or hot days. October and November were cooler than average before warming up in late November, just in time for flowering, resulting in a very even fruit set. The temperature throughout January was slightly above average before returning to the long-term average in February and March.

Coonawarra did receive a couple of rainfall events in mid-Spring, which, combined with cooler temperatures, reduced the irrigation needs for the remainder of the season, which was beneficial to general vine health.

The ideal flowering conditions and above-average temperature throughout January resulted in all varieties going through veraison quickly. A great sign of a very even year, with minimal variability between bunches and within bunches. Dry conditions continued through summer, and consequently, berries remained small with thick skins.

The Bonney Upwelling commenced in early February, with the Southern Ocean temperature dropping significantly, moderating the afternoon and night temperatures across the Limestone Coast. These climatic conditions led to steady increases in maturity levels, allowing winemakers to pick at optimum levels for ripeness and flavour.

The vintage start was consistent with whites' long-term average before moving into Shiraz, finishing with Cabernet in the second half of May.

2022 points to a good vintage with lovely firm acidity in the whites and good fruit expression and tannins across all reds, which will translate into wines that have good cellaring potential. Cabernet Sauvignon was a standout.

Coonawarra Vignerons Board (Coonawarra Grape and Wine Incorporated)

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Coonawarra winegrapes was 36,122 tonnes in 2022, 28 per cent below the near-record crush of 50,199 tonnes in 2021. It was very closely in line with the five-year (2017–2021) average crush of 35,976 tonnes.

There was a record 48 respondents to the survey who reported crushing grapes from Coonawarra in 2022, compared with 40 in 2021.

The total estimated value of Coonawarra winegrapes in 2022 was just over $40.8 million compared with $65.5 million in 2021. The lower production was compounded by a 13 per cent decrease in the average purchase value of grapes, which declined from $1318 per tonne overall in 2021 to $1145 per tonne.

Cabernet Sauvignon decreased by 15 per cent to $1204 per tonne, and Shiraz decreased by 18 per cent to $1193 per tonne. On the other hand, Chardonnay was up 12 per cent to $914 per tonne and Sauvignon Blanc increased by 17 per cent to $1147 per tonne, almost matching the price of the reds.

The price dispersion data shows a downward shift in prices paid, with 31 per cent of grapes purchased at below $600 per tonne, compared with 14 per cent in 2021.

According to Vinehealth Australia data, the total vineyard area in Coonawarra as at 30 April 2022 was 5831 hectares, 10 hectares less than last year, and virtually identical to what it was five years ago.

New plantings in the region have declined dramatically from 222 hectares in the 2019–20 season to just 29 hectares in 2021–22, almost all of them Cabernet Sauvignon.

Coonawarra

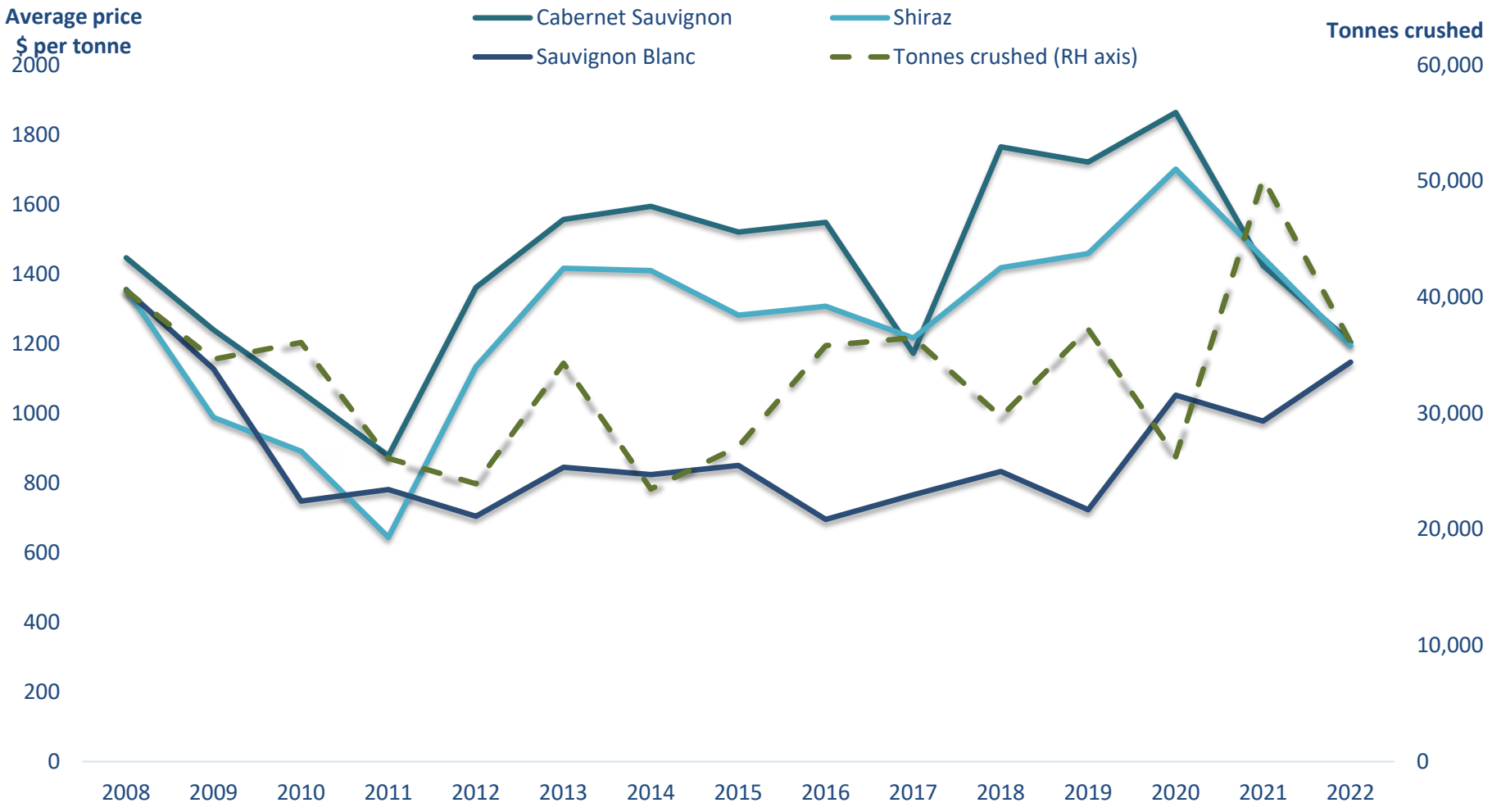
Winegrape intake summary table

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					8	100%	8	$15,381
Cabernet Franc	7				134	95%	141	$175,991
Cabernet Sauvignon	7,679	$9,243,699	$1,204	-15%	13,857	64%	21,536	$25,924,384
Malbec	23				90	79%	114	$227,540
Merlot	780	$537,946	$690	9%	2,353	75%	3,133	$2,161,556
Petit Verdot	14				284	95%	298	$178,681
Pinot Meunier					10	100%	10	$18,427
Pinot Noir	65	$102,336	$1,566	1%	193	75%	259	$405,156
Sangiovese					3	100%	3	$4,063
Shiraz	1,421	$1,695,058	$1,193	-18%	5,083	78%	6,504	$7,756,567
Tempranillo					11	100%	11	$19,227
Other red	7				0	4%	8	$12,921
Red Total	**9,997**	**$11,655,770**	**$1,166**	**-14%**	**22,025**	**69%**	**32,023**	**$36,899,894**
White								
Chardonnay	759	$693,299	$914	12%	1,546	67%	2,304	$2,106,295
Gewürztraminer					5	100%	5	$5,329
Pinot Gris/Grigio	31				9	23%	40	$40,200
Riesling	27				280	91%	306	$211,242
Sauvignon Blanc	288	$330,452	$1,147	17%	888	76%	1,176	$1,349,446
Semillon	33				221	87%	254	$152,256
Other white					13	100%	13	$24,650
White Total	**1,137**	**$1,092,887**	**$961**	**11%**	**2,962**	**72%**	**4,099**	**$3,889,419**
Grand Total	**11,135**	**$12,748,657**	**$1,145**	**-13%**	**24,987**	**69%**	**36,122**	**$40,789,313**

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

Coonawarra

Historical weighted average price vs tonnes crushed



Coonawarra

Price dispersion – purchased grapes

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Cabernet Franc			7			7
Cabernet Sauvignon	2,491	258	2,072	2,226	633	7,679
Malbec					23	23
Merlot	512	65	186		16	780
Petit Verdot		14				14
Pinot Noir			37	17	11	65
Shiraz	421	39	273	624	64	1,421
Other red		2			5	7
Red Total	**3,424**	**379**	**2,576**	**2,867**	**752**	**9,997**
White						
Chardonnay		300	459			759
Pinot Gris/Grigio			31			31
Riesling	16		11			27
Sauvignon Blanc			288			288
Semillon		33				33
White Total	**16**	**332**	**789**			**1,137**
Total purchased	**3,439**	**712**	**3,365**	**2,867**	**752**	**11,135**

Coonawarra

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	21	4	0	0	25	*0%*
Cabernet Sauvignon	3,449	213	97	21	3,780	*1%*
Malbec	16	2	0	0	18	*0%*
Merlot	350	6	1	0	357	*0%*
Meunier (Pinot Meunier)	2	0	0	0	2	*0%*
Petit Verdot	19	0	0	0	19	*0%*
Pinot Noir	32	0	0	0	32	*0%*
Shiraz	1,149	0	0	8	1,157	*1%*
Tempranillo	3	0	0	0	3	*0%*
Other Red	7	0	0	0	7	*0%*
Total red varieties	**5,048**	**225**	**98**	**29**	**5,400**	***1%***
White winegrapes						
Chardonnay	253	0	0	0	253	*0%*
Riesling	45	0	0	0	45	*0%*
Sauvignon Blanc	88	0	0	0	88	*0%*
Semillon	12	0	0	0	12	*0%*
Other White	10	0	0	0	10	*0%*
Total white varieties	**408**	**0**	**0**	**0**	**408**	***0%***
Unknown variety	23	0	0	0	23	*0%*
Total all varieties	**5,479**	**225**	**98**	**29**	**5,831**	***0%***

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

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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