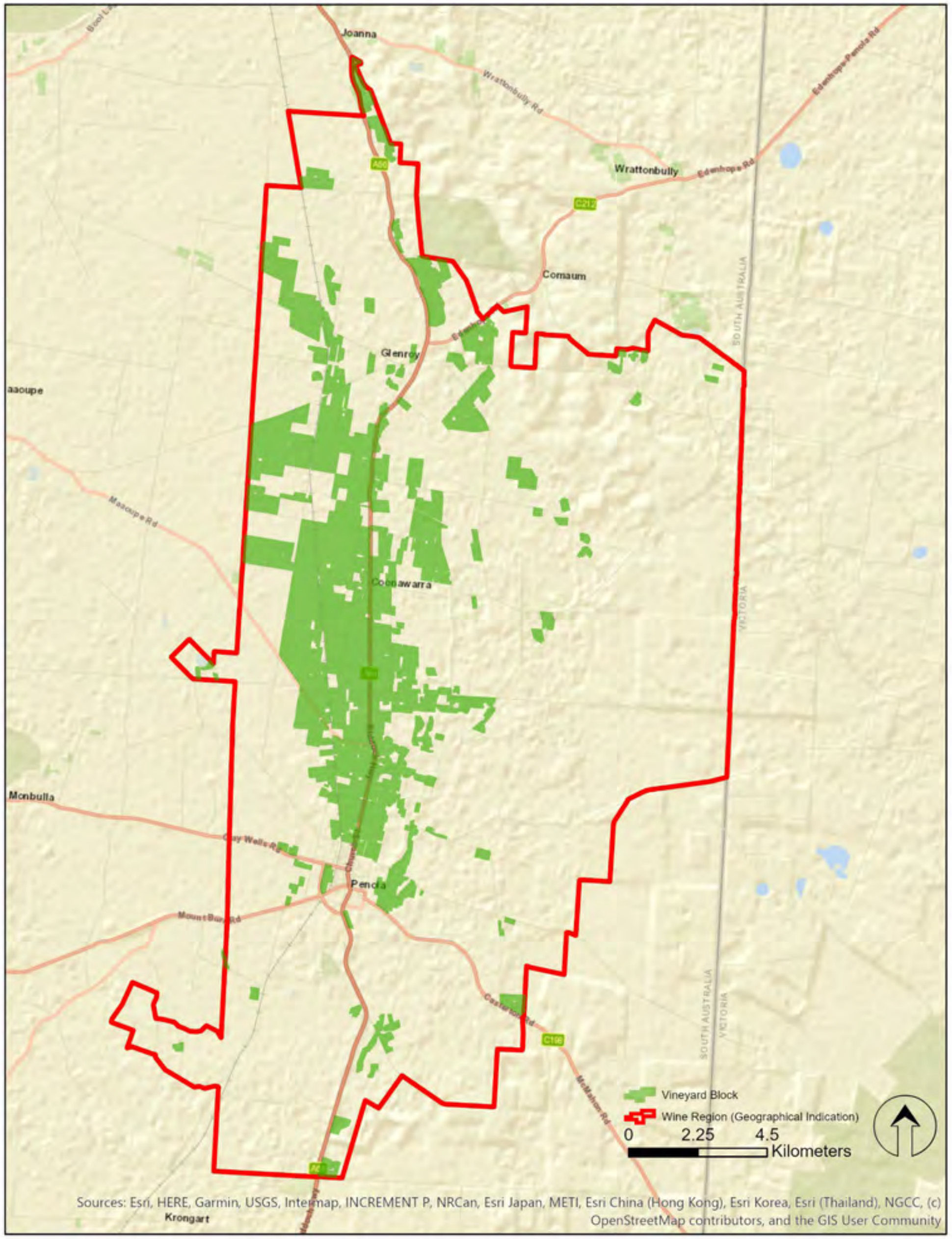

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 29th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Coonawarra Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

Coonawarra Wine Region

Wine Australia July 2023

Coonawarra

Vintage overview

VINTAGE REPORT

The 2023 vintage had its challenges, with both viticulturists and winemakers confronted with less than perfect conditions. However, winemakers are optimistic there will be some very good quality wines from the 2023 vintage.

Coonawarra experienced average rainfall through the 2022 winter months and into spring, which was beneficial in recharging the aquifer and ensuring the growing season commenced with full soil moisture profiles.

Increased moisture and cooler conditions on account of a La Niña system meant there were no spring frosts; however, this did result in greater downy mildew pressure. Increased preventative copper sprays, along with additional focus on canopy management, helped to mitigate this disease pressure.

The cool and wet spring transitioned to warm and dry conditions in January, with below-average rainfall and above-average temperatures. The warmer conditions were well-timed for flowering, which occurred in early December rather than the usual November timing. Most varieties flowered within a 2-week period, although timing was everything, with a few windy days causing damage to flowers and yield reductions for some blocks.

The trend returned to cooler, wetter weather patterns from February, which persisted throughout vintage.

Vintage commenced in late March with the white varieties, which had thrived and display refined varietal characteristics and good natural acidity. Cabernet Sauvignon and Shiraz, the major red varieties, were harvested from early-April to mid-May. This was later than usual and resulted in sugar levels lower than the past few years but reminiscent of the great Coonawarra reds from the 1980’s and 1990’s.

Despite the challenges and some losses due to Botrytis infection late in the season, the diligence of vineyard teams paid off with good quality grapes being delivered to wineries.

Coonawarra Vignerons Board (Coonawarra Grape and Wine Incorporated)

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Coonawarra winegrapes was 20,373 tonnes in 2023, 44 per cent below the crush of 36,122 tonnes in 2022 and 43 per cent below the five-year (2018–2022) average crush of 35,899 tonnes.

There was 38 respondents to the survey who reported crushing grapes from Coonawarra in 2023, compared with 48 in 2022.

The total estimated value of Coonawarra winegrapes in 2023 was just over $26 million compared with $41 million in 2022. The lower production was partly offset by a 13 per cent increase in the average purchase value, which increased from $1145 per tonne in 2022 to $1289 per tonne.

The average value of the top three red varieties increased; Cabernet Sauvignon was up by 8 per cent to $1303 per tonne, Shiraz up by 26 per cent to $1500 per tonne and Merlot up by 55 per cent to $1068 per tonne. The average price of Shiraz was $197 (15 per cent) higher than Cabernet Sauvignon, the first time the average value of Shiraz has ever exceeded that of Cabernet Sauvignon by a significant amount in this region. White varieties also increased in average value, with Chardonnay up 17 per cent to $1071 per tonne and Sauvignon Blanc up 3 per cent to $1178 per tonne.

The price dispersion data shows an upward shift in prices paid, with only 8 per cent of grapes purchased at below $600 per tonne, compared with 31 per cent in 2022.

According to Vinehealth Australia data, the total vineyard area in Coonawarra as at 30 April 2023 was 5789 hectares, 42 hectares less than last year, and virtually identical to what it was five years ago.

New plantings in the region have increased marginally from 22 hectares in the 2021–22 season to 28 hectares in 2022–23, of which 21 hectares planted were of Cabernet Sauvignon and the balance being Shiraz.

Coonawarra

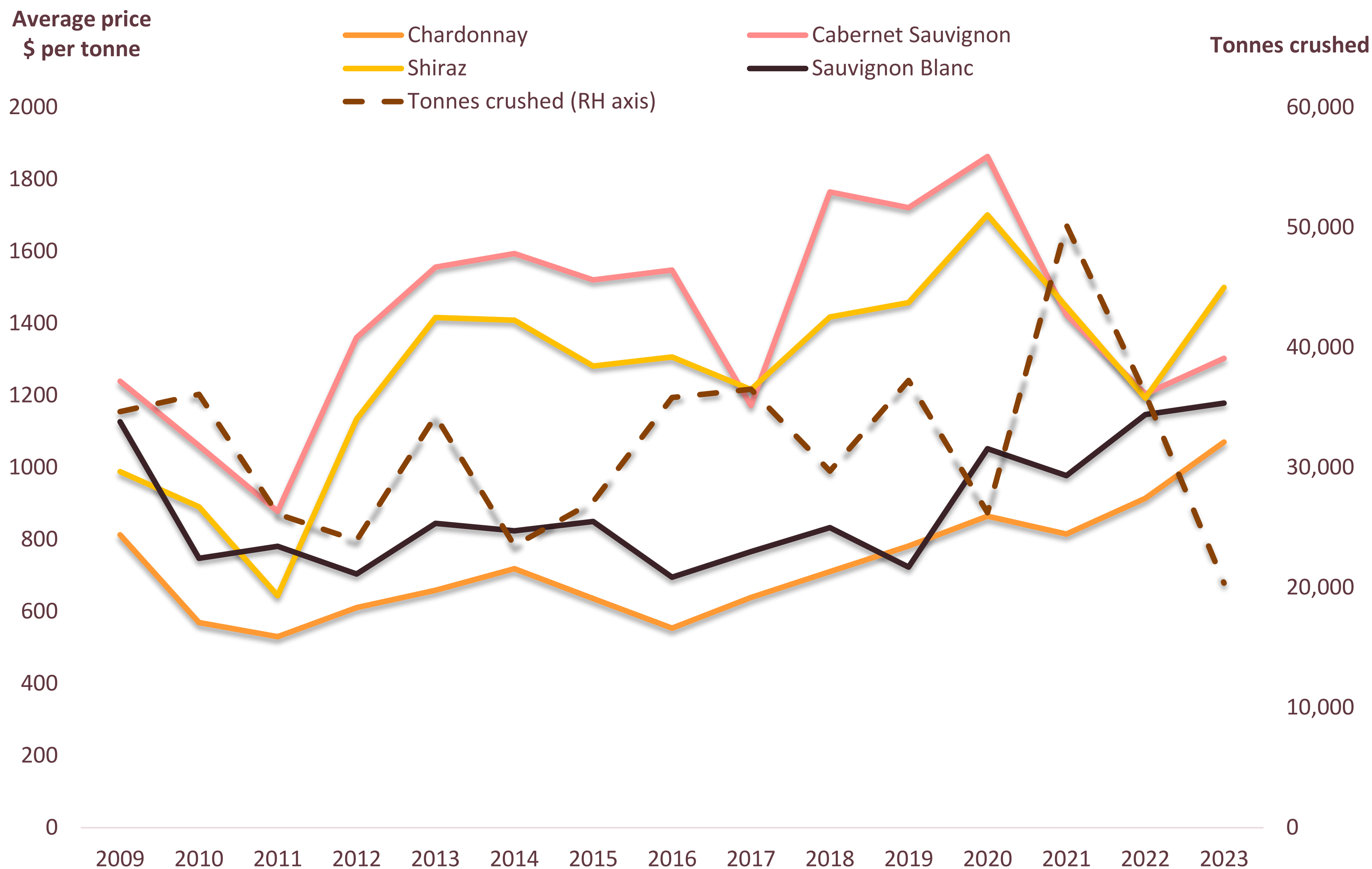
Winegrape intake summary table

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								
Cabernet Franc	8				55	88%	63	$70,676
Cabernet Sauvignon	2,172	$2,829,648	$1,303	8%	8,162	79%	10,334	$13,465,538
Malbec	8				21	73%	29	$57,682
Merlot	201	$214,775	$1,068	55%	1,376	87%	1,577	$1,684,912
Petit Verdot	13				190	94%	203	$101,451
Pinot Meunier					5	100%	5	$11,270
Pinot Noir	74	$111,472	$1,505	-4%	184	71%	258	$387,788
Shiraz	756	$1,134,322	$1,500	26%	4,048	84%	4,804	$7,206,002
Tempranillo					10	100%	10	$17,929
Other red	8						8	$16,212
Red Total	**3,239**	**$4,337,141**	**$1,339**	**15%**	**14,051**	**81%**	**17,291**	**$23,019,461**
White								
Chardonnay	541	$579,415	$1,071	17%	933	63%	1,474	$1,578,008
Gewürztraminer					6	100%	6	$6,772
Pinot Gris/Grigio	16				15	47%	31	$30,730
Riesling	27	$27,719	$1,042	0%	294	92%	321	$334,119
Sauvignon Blanc	194	$228,630	$1,178	3%	874	82%	1,069	$1,258,831
Semillon	17				160	91%	177	$106,180
Viognier					0	100%	0	$470
Other white					6	100%	6	$10,208
White Total	**795**	**$861,930**	**$1,085**	**13%**	**2,288**	**74%**	**3,083**	**$3,325,317**
Grand Total	**4,034**	**$5,199,071**	**$1,289**	**13%**	**16,339**	**80%**	**20,373**	**$26,344,778**

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			8			8
Cabernet Sauvignon	268	73	1,017	653	160	2,172
Malbec					8	8
Merlot		58	143			201
Petit Verdot	13					13
Pinot Noir		15	20	26	14	74
Shiraz	47	22	384	255	48	756
Other red					8	8
Red Total	**328**	**169**	**1,571**	**935**	**237**	**3,239**
White						
Chardonnay		125	345	71		541
Pinot Gris/Grigio			16			16
Riesling			24	3		27
Sauvignon Blanc			194			194
Semillon		17				17
White Total		**142**	**579**	**74**		**795**
Total purchased	**328**	**311**	**2,151**	**1,008**	**237**	**4,034**

Coonawarra

Current plantings by variety and year planted

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Franc	25	0	0	0	25	0%
Cabernet Sauvignon	3,628	97	20	21	3,766	1%
Malbec	18	0	0	0	18	0%
Merlot	348	1	0	0	349	0%
Meunier	2	0	0	0	2	0%
Petit Verdot	18	0	0	0	18	0%
Pinot Noir	31	0	0	0	31	0%
Shiraz	1,141	0	2	7	1,150	1%
Tempranillo	2	0	0	0	2	0%
Other Red	5	0	0	0	5	0%
Total red varieties	**5,218**	**98**	**22**	**28**	**5,366**	**1%**
White winegrapes						
Chardonnay	246	0	0	0	246	0%
Riesling	45	0	0	0	45	0%
Sauvignon Blanc	87	0	0	0	87	0%
Semillon	11	0	0	0	11	0%
Other White	10	0	0	0	10	0%
Total white varieties	**399**	**0**	**0**	**0**	**399**	**0%**
Unknown variety	24	0	0	0	24	0%
Total all varieties	**5,641**	**98**	**22**	**28**	**5,789**	**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 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

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:

Wine Australia Market Insights
+61 8 8228 2000
Market.Insights@wineaustralia.com

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