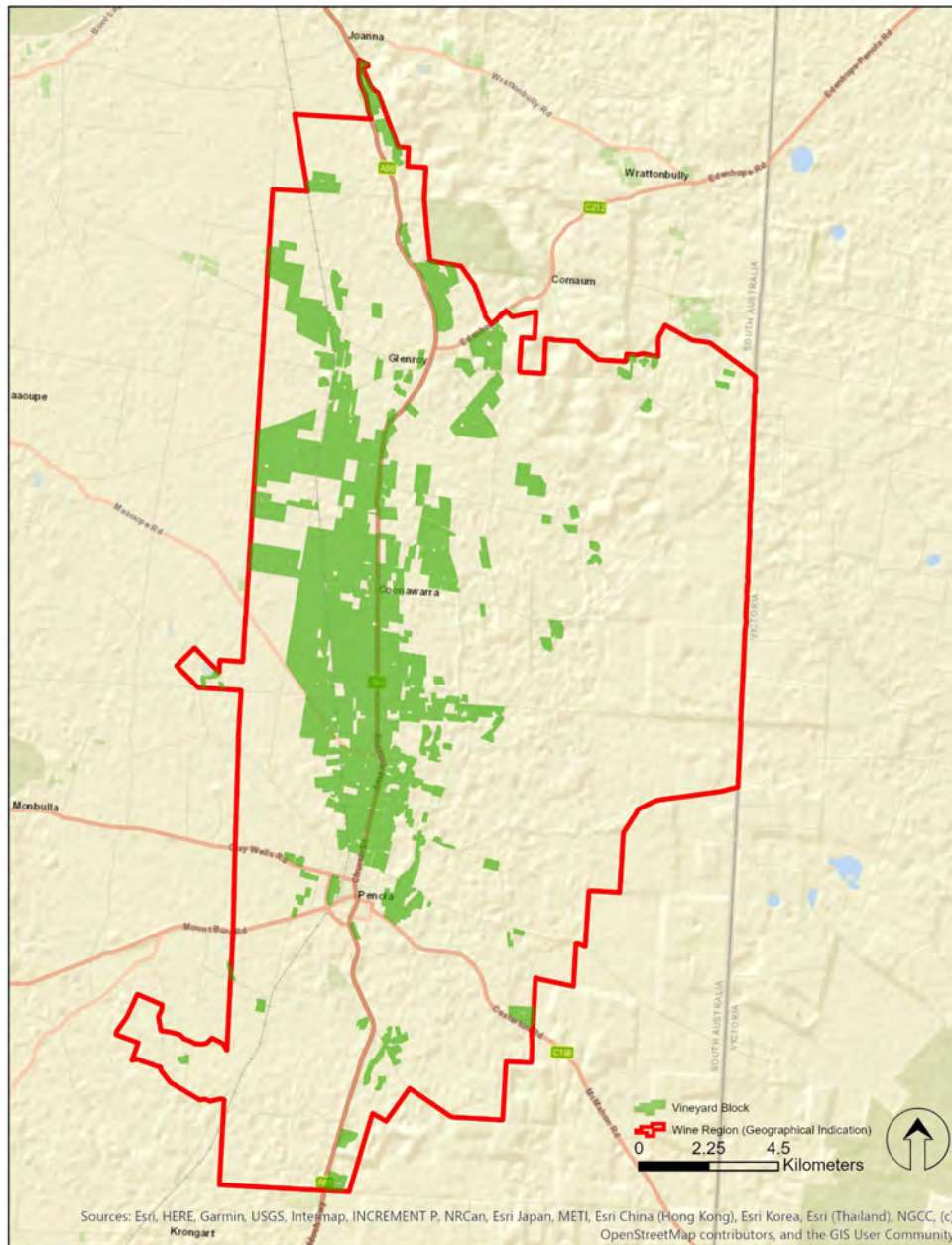


# SA Winegrape Crush Survey 2024

## Regional Summary Report

### Coonawarra Wine Region

*Wine Australia July 2024*



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

### Coonawarra Wine Region



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# Coonawarra

## Vintage overview

### VINTAGE REPORT

The 2024 Vintage in Coonawarra was unlike any other in the modern era.

The growing season was set up by an El Niño influence with a warmer and drier preceding winter. This resulted in early budburst and start to the season. Then, unexpectedly, Coonawarra had cooler and wetter weather in late spring and early summer, resulting in good shoot growth and healthy canopies.

There were some minor frost events throughout spring, but frost protection effectively mitigated fruit and vine damage. The cold wet weather in November and December, throughout flowering and fruit set, resulted in low to moderate yields.

The early onset of an incredibly strong Bonney Upwelling off the Limestone Coast (a local oceanographic phenomenon that drops ocean surface temperature considerably and restrains temperatures across the region) moderated the weather and had a particular impact on the night temperatures through December and well into the New Year.

With the New Year came changing weather patterns. Warm and dry conditions with cool nights were optimal for quality in the ripening phase.

Leading into harvest, Coonawarra experienced mild to warm and dry conditions, punctuated with bursts of heat, without any unwanted rain.

Vintage was slightly earlier than average, with the majority of reds harvested throughout late March and April.

Vintage 2024 points to an exceptionally good vintage with lovely firm acidity in the whites and a strong red wine vintage, with very intense colours, bold tannins and depth of varietal fruit flavours.

*Coonawarra Vignerons Board (Coonawarra Grape and Wine Incorporated)*

### OVERVIEW OF VINTAGE STATISTICS

The reported crush of Coonawarra winegrapes in 2024 was 27,143 tonnes, up by 33 per cent compared with the prior year's crush. Over the past five years, the average crush for the Coonawarra has been 34,035 tonnes, making this year's crush 20 per cent below the five-year (2019–2023) average.

There were 36 respondents to the survey who reported crushing grapes from the Coonawarra in 2024, compared with 38 in 2023.

The total value of winegrapes in 2024 was \$36 million, compared with \$26 million in 2023, an increase of 37 per cent. The overall average value increased by 3 per cent from \$1,289 in 2023 to \$1,331 per tonne.

The overall increase in average value was driven by Cabernet Sauvignon, (up by 8 per cent to \$1404 per tonne). On the other hand, Shiraz was down by 1 per cent to \$1489 per tonne. Despite the decrease, Shiraz had the highest average value of the major varieties for the second year in a row.

The price dispersion data shows very little change in the distribution of prices, with 32 per cent of all grapes being purchased at \$1500 per tonne or above compared with 31 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in Coonawarra as at 30 April 2024 was 5,731 hectares, a decrease of 58 hectares compared with the previous year and 5 more than it was in 2019. The average vineyard size in Coonawarra is 31 hectares, nearly double the state average of 16.1 hectares.

There were 6 hectares of new vines planted in the region in the 2023–24 season, all of which were Cabernet Sauvignon. There were 15 hectares of Cabernet Sauvignon and 7 hectares of Shiraz planted in the previous season.

# Coonawarra

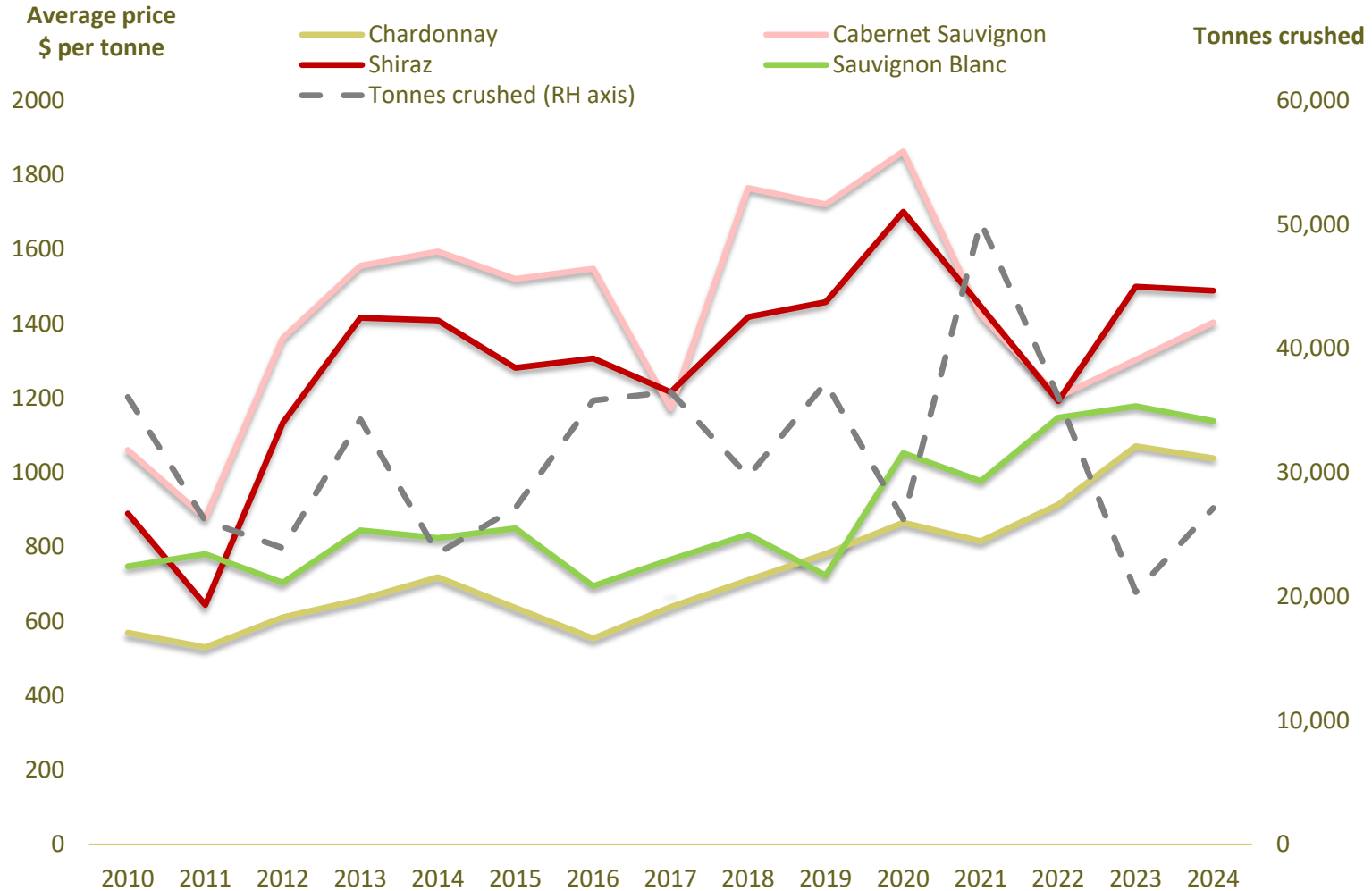
## Winegrape intake summary table

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
<b>Red</b>								
Barbera					4	100%	4	\$8,505
Cabernet Franc	24	\$29,713	\$1,260	0%	117	83%	141	\$177,323
Cabernet Sauvignon	4,175	\$5,860,171	\$1,404	8%	10,528	72%	14,703	\$20,639,402
Grenache					2	100%	2	\$3,160
Malbec	18				99	85%	117	\$198,356
Merlot	465	\$445,911	\$960	-10%	1,509	76%	1,974	\$1,894,102
Nebbiolo	6						6	\$12,000
Petit Verdot	17				53	76%	70	\$34,841
Pinot Meunier					3	100%	3	\$5,529
Pinot Noir	68	\$111,177	\$1,648	10%	161	70%	229	\$376,671
Sangiovese					7	100%	7	\$10,531
Shiraz	1,039	\$1,547,210	\$1,489	-1%	4,614	82%	5,653	\$8,418,884
Tempranillo					9	100%	9	\$17,005
Other red	6				0	8%	6	\$12,642
<b>Red Total</b>	<b>5,816</b>	<b>\$8,056,807</b>	<b>\$1,385</b>	<b>3%</b>	<b>17,107</b>	<b>75%</b>	<b>22,923</b>	<b>\$31,808,951</b>
<b>White</b>								
Chardonnay	691	\$717,478	\$1,039	-3%	1,786	72%	2,476	\$2,572,423
Gewürztraminer					11	100%	11	\$13,913
Riesling	93	\$87,953	\$943	-10%	424	82%	518	\$488,353
Sauvignon Blanc	265	\$301,309	\$1,138	-3%	685	72%	949	\$1,080,483
Semillon	34				218	87%	252	\$151,033
Viognier					1	100%	1	\$1,069
Other white					13	100%	13	\$22,719
<b>White Total</b>	<b>1,082</b>	<b>\$1,126,918</b>	<b>\$1,041</b>	<b>-4%</b>	<b>3,138</b>	<b>74%</b>	<b>4,220</b>	<b>\$4,329,992</b>
<b>Grand Total</b>	<b>6,898</b>	<b>\$9,183,726</b>	<b>\$1,331</b>	<b>3%</b>	<b>20,245</b>	<b>75%</b>	<b>27,143</b>	<b>\$36,138,942</b>

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
<b>Red</b>						
Cabernet Franc			20	4		24
Cabernet Sauvignon	281	599	1,718	1,040	536	4,175
Malbec				18		18
Merlot	91	56	317	1		465
Nebbiolo					6	6
Petit Verdot	17					17
Pinot Noir			38	20	10	68
Shiraz			493	484	61	1,039
Other red					6	6
<b>Red Total</b>	<b>389</b>	<b>654</b>	<b>2,586</b>	<b>1,567</b>	<b>619</b>	<b>5,816</b>
<b>White</b>						
Chardonnay	18	153	519			691
Riesling		44	49			93
Sauvignon Blanc			265			265
Semillon		34				34
<b>White Total</b>	<b>18</b>	<b>231</b>	<b>833</b>			<b>1,082</b>
<b>Total purchased</b>	<b>408</b>	<b>885</b>	<b>3,420</b>	<b>1,567</b>	<b>619</b>	<b>6,898</b>

# Coonawarra

## Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
<b>Red winegrapes</b>						
Cabernet Franc	24	0	0	0	24	0%
Cabernet Sauvignon	3,658	19	15	6	3,698	0%
Malbec	18	1	0	0	19	0%
Merlot	344	0	0	0	344	0%
Meunier (Pinot Meunier)	2	0	0	0	2	0%
Petit Verdot	18	0	0	0	18	0%
Pinot Noir	32	0	0	0	32	0%
Shiraz	1,132	2	7	0	1,141	0%
<b>Other Red</b>	7	0	0	0	7	0%
<b>Red winegrapes Total</b>	<b>5,236</b>	<b>23</b>	<b>22</b>	<b>6</b>	<b>5,287</b>	<b>0%</b>
<b>White winegrapes</b>						
Chardonnay	250	0	0	0	250	0%
Riesling	45	0	0	0	45	0%
Sauvignon Blanc	84	0	0	0	84	0%
Semillon	10	0	0	0	10	0%
Other White	10	0	0	0	10	0%
<b>White winegrapes Total</b>	<b>399</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>399</b>	<b>0%</b>
Unknown variety	45	0	0	0	45	0%
<b>All varieties Total</b>	<b>5,681</b>	<b>23</b>	<b>22</b>	<b>6</b>	<b>5,731</b>	<b>0%</b>

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 receipt – 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](http://vinehealth.com.au) and via links from the Wine Grape Council SA website [wgcsa.com.au](http://wgcsa.com.au) and the South Australian Wine Industry Association website [www.winesa.asn.au](http://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 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

