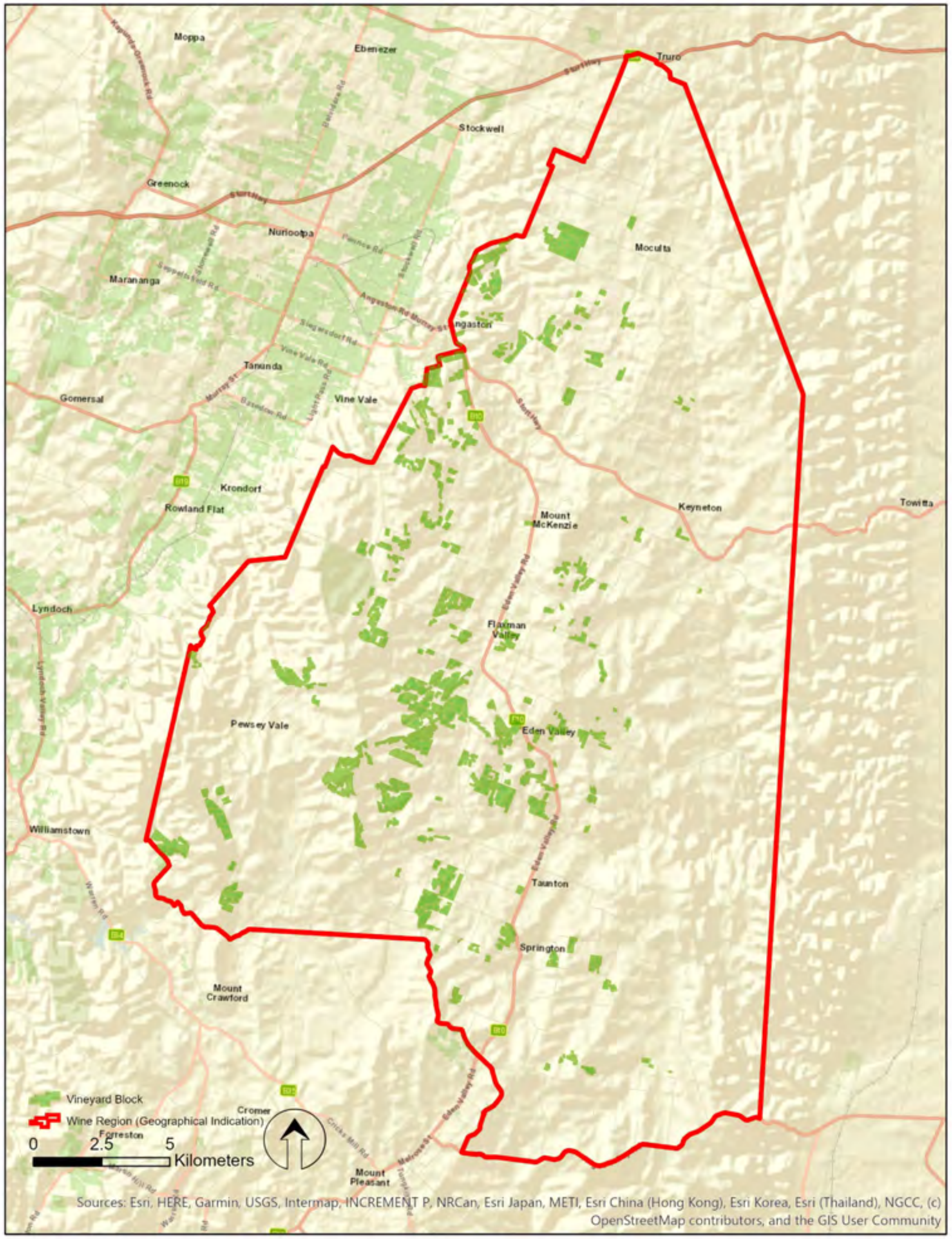

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Eden Valley Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2022

Regional Summary Report

Eden Valley Wine Region

Wine Australia July 2022

Eden Valley

Vintage overview

VINTAGE REPORT

Like the neighbouring Barossa Valley, the weather statistics for the Eden Valley were close to average overall but varied considerably across the region. Winter was wet, welcomed by all after a dry couple of years as the dams and soils filled. Good falls of over 100mm were recorded in both June and July, with July being 70% higher than average. Rainfall was also good in October and November, meaning soil moisture in the profile was at field capacity and the beginning of the irrigation season could be delayed until December. There was some rainy and windy weather in November as fruit set, causing lower than average yields for most. Growing season rainfall was 12% below average, in part due to a very dry December, February and March where less than 10mm was recorded for each month.

Maximum temperatures for the beginning of the season were generally on average or slightly below. This trend continued into summer with the absence of warm days; February's maximum temperature was 1.1°C below average, which was similar to the previous 2 years. Minimum temperatures followed a similar trend with October and November being 1.5°C and 1.8°C cooler than average.

The 28th of October storm that damaged parts of the Barossa Valley also hit some vineyards in Eden Valley. Those the hail missed, and some it didn't, have ripened low but intense crops that have delicious flavours and delightful natural acidity.

Mild conditions in January and February provided perfect ripening conditions as the fruit moved through veraison. With the absence of severe heatwaves, the acid held in the grapes for a prolonged period and resulted in a vintage that was less compressed than previous years, lowering the stress levels of winemakers and viticulturists alike.

Yalumba Vineyard Manager/Viticulturist Brooke Howell on behalf of Barossa Australia.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Eden Valley winegrapes was 6842 tonnes in 2022, a decrease of 29 per cent compared with the 2021 vintage. Over the past five years (up to 2021), the average crush for Eden Valley has been 8482 tonnes, making this year's crush 19 per cent below the five-year average.

There were 39 respondents to the survey who reported crushing grapes from Eden Valley in 2022, compared with 41 in 2021.

The total estimated value of winegrapes in 2022 decreased from just under $21 million to $14 million (a 32 per cent decrease), as a result of the lower production combined with a small overall decrease in the average purchase value of grapes, which decreased by 5 per cent from $2191 to $2085 per tonne.

There were decreases in average value for the major reds; Shiraz was down 4 per cent to $2640 per tonne and Cabernet Sauvignon was down 6 per cent to $2263 per tonne. Chardonnay also decreased – down 5 per cent to $1605 per tonne; however, Riesling was up 4 per cent to $1944 per tonne.

The price dispersion also showed a downward shift, with 43 per cent of all varieties purchased at $2000 and above, compared with 54 per cent in 2021.

According to Vinehealth Australia data, there were 18 hectares of new vines planted in the 2021–2022 season, compared with just 9 hectares in the 2020-21 season. Of the new plantings, 8 hectares were Grenache, which resulted in a 28 per cent increase in the total area of this variety.

The total vineyard area in Eden Valley as at 30 April 2022 was 2313 hectares, approximately 30 hectares less than it was five years ago.

Eden 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					1	100%	1	$2,616
Cabernet Franc	12				35	74%	48	$119,175
Cabernet Sauvignon	179	$404,149	$2,263	-6%	760	81%	939	$2,123,988
Durif					10	100%	10	$13,491
Graciano					4	100%	4	$6,558
Grenache	27	$95,519	$3,558	24%	6	18%	33	$117,008
Lagrein					3	100%	3	$3,923
Malbec					1	100%	1	$940
Mataro/Mourvedre	7				54	89%	61	$158,530
Merlot	57	$77,198	$1,350	8%	159	74%	216	$291,556
Montepulciano	4				14	79%	18	$36,834
Nebbiolo					1	100%	1	$3,532
Nero d'Avola	1						1	$2,300
Petit Verdot					31	100%	31	$35,399
Pinot Noir	79	$122,562	$1,549	15%	65	45%	144	$222,580
Shiraz	1,071	$2,827,260	$2,640	-4%	848	44%	1,919	$5,066,286
Tempranillo	15				20	57%	34	$100,539
Other red	3				24	90%	27	$39,281
Red Total	**1,454**	**$3,631,919**	**$2,498**	**-3%**	**2,036**	**58%**	**3,490**	**$8,344,537**
White								
Chardonnay	425	$682,082	$1,605	-5%	400	48%	825	$1,324,279
Gewürztraminer	6				9	59%	15	$17,022
Grüner Veltliner					6	100%	6	$11,838
Muscat à Petits Grains Blancs	12	$11,437	$954	6%	1	10%	13	$12,772
Pinot Gris/Grigio	119	$164,001	$1,380	-8%	38	24%	157	$216,161
Riesling	806	$1,567,606	$1,944	4%	1,088	57%	1,894	$3,682,845
Roussanne	20				5	21%	25	$53,180
Sauvignon Blanc	64	$66,842	$1,039	7%	70	52%	135	$140,097
Semillon	95	$73,849	$780	7%	18	16%	113	$88,101
Viognier	50	$109,615	$2,199	19%	60	55%	110	$242,400
Other white	10				50	84%	59	$132,982
White Total	**1,606**	**$2,747,088**	**$1,710**	**3%**	**1,746**	**52%**	**3,352**	**$5,921,678**
Grand Total	**3,060**	**$6,379,007**	**$2,085**	**-5%**	**3,782**	**55%**	**6,842**	**$14,266,215**

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

Eden Valley

Price dispersion – purchased grapes

	Tonnes purchased in each segment				
Varieties	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red					
Cabernet Franc				12	12
Cabernet Sauvignon			87	91	179
Grenache				27	27
Mataro/Mourvedre				7	7
Merlot	5	40	12		57
Montepulciano				4	4
Nero d'Avola				1	1
Pinot Noir		44	16	19	79
Shiraz			443	628	1,071
Tempranillo				15	15
Other red		3			3
Red Total	**5**	**87**	**559**	**804**	**1,454**
White					
Chardonnay	13	3	361	49	425
Gewürztraminer		6			6
Muscat à Petits Grains Blancs	8	2	1		12
Pinot Gris/Grigio	5	102	12		119
Riesling		10	396	400	806
Roussanne		6		14	20
Sauvignon Blanc		64			64
Semillon	89	4	2		95
Viognier			17	33	50
Other white				10	10
White Total	**115**	**197**	**788**	**506**	**1,606**
Total purchased	**120**	**283**	**1,347**	**1,310**	**3,060**

Eden 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	6	0	0	0	6	*0%*
Cabernet Sauvignon	303	42	1	0	346	*0%*
Grenache	20	1	0	8	29	*28%*
Mataro (Mourvedre)	15	1	0	0	16	*0%*
Merlot	50	0	0	0	50	*0%*
Montepulciano	3	0	0	0	3	*0%*
Petit Verdot	7	0	0	0	7	*0%*
Pinot Noir	54	0	0	0	54	*0%*
Shiraz	773	44	5	2	824	*0%*
Tempranillo	12	0	0	2	14	*14%*
Other Red	13	0	0	0	13	*0%*
Total red varieties	**1,256**	**88**	**6**	**12**	**1,362**	***1%***
White winegrapes						
Chardonnay	240	0	0	0	240	*0%*
Muscat A Petit Grains Blanc (White Frontignac)	6	0	0	0	6	*0%*
Pinot Gris	35	0	3	2	40	*5%*
Riesling	519	2	0	4	525	*1%*
Sauvignon Blanc	37	0	0	0	37	*0%*
Semillon	15	0	0	0	15	*0%*
Traminer (Gewurztraminer)	14	0	0	0	14	*0%*
Viognier	33	0	0	0	33	*0%*
Other White	22	1	0	0	23	*0%*
Total white varieties	**921**	**3**	**3**	**6**	**933**	***1%***
Unknown variety	18	0	0	0	18	*0%*
Total all varieties	**2,195**	**91**	**9**	**18**	**2,313**	***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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