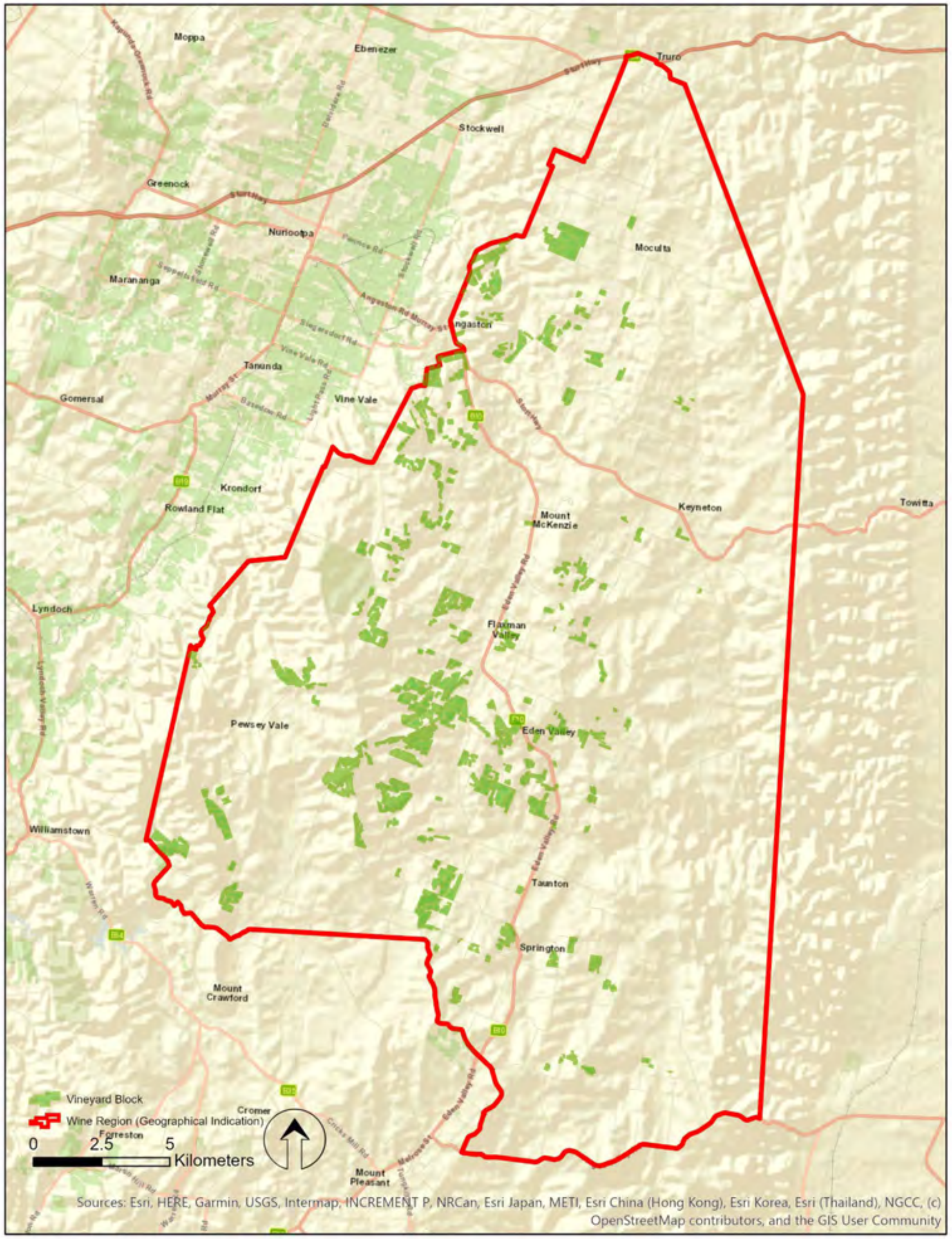

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Eden Valley Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

Eden Valley Wine Region

Wine Australia July 2023

Eden Valley

Vintage overview

VINTAGE REPORT

Eden Valley vineyards entered the growing season with above average soil moisture, which saw strong budburst across most vineyards.

With a combination of Negative IOD and La Niña climatic patterns, spring rainfall was one of the wettest on record. The constant rain created significant Downy Mildew disease risk and made it difficult to get onto Eden Valley vineyards in some places. However, the majority of growers kept the disease at bay with diligent spray programs.

Happily, the rain caused run-off into most Eden Valley dams this season - for the first time in many years.

Due to reasonably large canopies after the wet spring, followed by a mild start to summer, fruit was harvested 4 to 6 weeks later than the 10-year average (for example, Eden Valley Shiraz, usually harvested in mid-March, was picked from mid-April to early May).

2023 yields varied across the region. Due to the cool conditions during flowering (September and October were cooler than average) fruit-set was sub-optimal in some areas.

Nicki Robins, Viticultural Development Manager
Barossa Australia

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Eden Valley winegrapes was 7129 tonnes in 2023, an increase of 4 per cent compared with the 2022 vintage. Over the past five years (up to 2022), the average crush for Eden Valley has been 7453 tonnes, making this year's crush 4 per cent below the five-year average.

There were 44 respondents to the survey who reported crushing grapes from Eden Valley in 2023, compared with 39 in 2022.

The total estimated value of winegrapes in 2023 increased by 7 per cent from $14 million to $15 million, as a result of increased production combined with a small overall increase in the average purchase value of grapes, which increased by 4 per cent from $2085 to $2163 per tonne.

The average value for Shiraz, the largest red variety, stayed the same at $2646 per tonne whereas Cabernet Sauvignon was down by 3 per cent to $2200 per tonne. Pinot Noir increased by 9 per cent to $1690 per tonne. The average value for whites increased by 5 per cent overall; Riesling was up 3 per cent to $1999 per tonne and Chardonnay was up 9 per cent to $1745 per tonne.

The price dispersion also showed an upward shift, with 52 per cent of all varieties purchased at $2000 and above, compared with 43 per cent in 2022.

According to Vinehealth Australia data, there were 4 hectares of new vines planted in the 2022–2023 season, compared with 18 hectares in the 2021-22 season. Of the new plantings, 2 hectares were Grenache, which resulted in a 7 per cent increase in the total area of this variety.

The total vineyard area in Eden Valley as at 30 April 2023 was 2299 hectares, approximately 36 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								
Cabernet Franc	6				20	78%	26	$67,088
Cabernet Sauvignon	183	$402,158	$2,200	-3%	484	73%	667	$1,467,976
Graciano					2	100%	2	$2,983
Grenache	20	$62,050	$3,105	-13%			20	$62,050
Lagrein					2	100%	2	$3,042
Malbec					1	100%	1	$1,498
Mataro/Mourvedre	7				36	85%	43	$113,008
Merlot	37	$40,648	$1,088	-19%	109	74%	147	$159,370
Montepulciano	5				2	27%	7	$13,400
Petit Verdot					7	100%	7	$11,140
Pinot Noir	119	$201,280	$1,690	9%	63	35%	182	$307,693
Shiraz	1,514	$3,996,024	$2,646	0%	921	38%	2,434	$6,432,050
Tempranillo	33				10	24%	43	$127,833
Other red	5				4	42%	9	$12,494
Red Total	**1,929**	**$4,848,035**	**$2,519**	**1%**	**1,661**	**46%**	**3,590**	**$8,781,625**
White								
Chardonnay	392	$684,952	$1,745	9%	447	53%	840	$1,465,825
Gewürztraminer	15				6	29%	21	$20,863
Grüner Veltliner					6	100%	6	$12,026
Muscat à Petits Grains Blancs	10				1	12%	12	$10,849
Pinot Gris/Grigio	87	$124,546	$1,438	4%	111	56%	198	$284,529
Riesling	957	$1,912,723	$1,999	3%	906	49%	1,863	$3,724,907
Roussanne	30				4	13%	34	$81,792
Sauvignon Blanc	57	$64,784	$1,143	10%	61	52%	118	$134,669
Semillon	133	$101,312	$764	-2%	32	20%	165	$126,032
Viognier	149	$281,792	$1,890	-14%	84	36%	233	$441,068
Other white	19				31	62%	50	$116,029
White Total	**1,848**	**$3,310,257**	**$1,791**	**5%**	**1,692**	**48%**	**3,539**	**$6,418,589**
Grand Total	**3,776**	**$8,158,292**	**$2,163**	**4%**	**3,353**	**47%**	**7,129**	**$15,200,216**

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

Varieties	Tonnes purchased in each segment $600-<$900	$900-<$1500	$1500-<$2000	>$2000	Total purchased
Red					
Cabernet Franc				6	6
Cabernet Sauvignon		6	90	87	183
Grenache			1	19	20
Mataro/Mourvedre				7	7
Merlot	13	23		1	37
Montepulciano				5	5
Pinot Noir		47	18	54	119
Shiraz	21	163	318	1,012	1,514
Tempranillo				33	33
Other red		5			5
Red Total	**34**	**244**	**428**	**1,223**	**1,929**
White					
Chardonnay	3	3	327	59	392
Gewürztraminer		15			15
Muscat à Petits Grains Blancs	7	4			10
Pinot Gris/Grigio		50	36	1	87
Riesling	9		383	565	957
Roussanne				30	30
Sauvignon Blanc		53	3		57
Semillon	122	9	2		133
Viognier		33	33	83	149
Other white		1		18	19
White Total	**140**	**167**	**785**	**756**	**1,848**
Total purchased	**174**	**411**	**1,212**	**1,978**	**3,776**

Eden Valley

Current plantings by variety and year planted

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	335	1	0	0	336	0%
Grenache	22	0	5	2	29	7%
Mataro (Mourvedre)	16	0	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	810	8	2	0	820	0%
Tempranillo	12	0	2	0	14	0%
Other Red	13	0	1	0	14	0%
Total red varieties	**1,328**	**9**	**10**	**2**	**1,349**	**0%**
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	3	2	0	40	0%
Riesling	521	0	4	1	526	0%
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	21	0	0	1	22	5%
Total white varieties	**922**	**3**	**6**	**2**	**933**	**0%**
Unknown variety	17	0	0	0	17	0%
Total all varieties	**2,267**	**12**	**16**	**4**	**2,299**	**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 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:

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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

Images – Wine Australia
GI maps – Vinehealth Australia