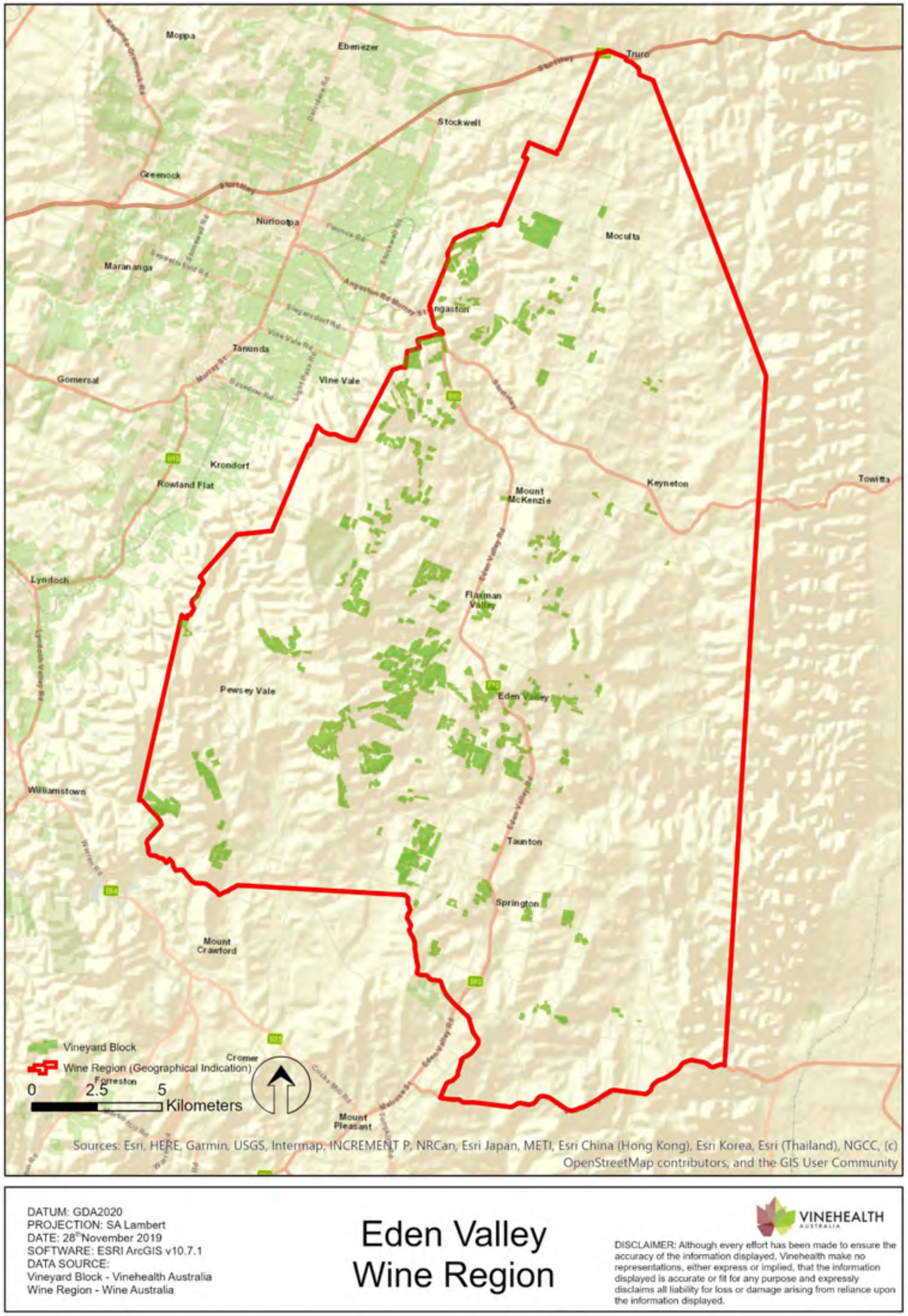

SA Winegrape Crush Survey 2024

Regional Summary Report

Eden Valley Wine Region

Wine Australia July 2024

Eden Valley

Vintage overview

VINTAGE REPORT

Winter saw below-average rains in Eden Valley (216 mm) and spring was even drier with only 119 mm (76 per cent of average). Rainfall was variable across the region, and some missed out on much of the rain.

Over the whole calendar year 2023, Eden Valley had average rainfall, although it didn't fall with the usual pattern.

The dry winter and spring made the vines work during the early part of the growing season, and bud burst started in September, three weeks earlier than the year before. Damaging frosts particularly, in September and October meant some vineyards had significant damage that influenced their subsequent yield.

Daytime temperatures in October and November were close to average, although windy weather and a heat spike in the middle of November did cause issues with flowering and hence fruit set in some vineyards.

With some rain, and slightly cooler than average days, December and early January saw vines flourish and move quickly into their ripening phase.

February, March and April remained dry, with many vineyards having more than 50 days with no recorded rainfall. An unseasonal heatwave in early March caused short-lived concern, but those vines that still had grapes recovered well in the following cooler weather.

Most varieties and vineyards were picked before Easter (end of March) with only the later ripening varieties and sites picking into April.

In 2024, quality across the board looks exceptional, although yields were variable. The whites are electric – with great natural acids and fine aromas, Riesling of course stands out, as do most of the other varieties.

Louisa Rose, Yalumba Wines
On behalf of Barossa Australia

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Eden Valley winegrapes in 2024 was 6,736 tonnes, down by 6 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Eden Valley has been 6,548 tonnes, making this year's crush very similar to the five-year average.

There were 46 respondents to the survey who reported crushing grapes from the Eden Valley in 2024, compared with 44 in 2023.

The total value of winegrapes in 2024 decreased by 6 per cent from $15 million to $14 million, as a result of the reduced crush combined with a small overall decrease in the average purchase value of grapes, which was down by 3 per cent from $2163 to $2097 per tonne.

The average value for the two largest varieties increased: Shiraz up by 3 per cent to $2715 per tonne and Riesling up 1 per cent to $2281 per tonne.

The price dispersion data shows a downward shift, with 45 per cent of all grapes being purchased at $2000 per tonne or above compared with 52 per cent in 2023.

According to Vinehealth Australia data, there were 13 hectares of new vines planted in the region in the 2023–24 season compared with 6 hectares in the previous season. More than half of the new plantings (7 hectares) were Riesling. The average vineyard size in Eden Valley is 13.7 hectares, compared with the state average of 16.1 hectares.

The total vineyard area in the Eden Valley as at 30 April 2024 was 2,292 hectares, approximately 41 hectares less than it was in 2019.

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	$2,227
Cabernet Franc	14				16	53%	30	$77,240
Cabernet Sauvignon	111	$259,214	$2,339	6%	365	77%	476	$1,113,951
Durif					16	100%	16	$15,562
Graciano					3	100%	3	$6,182
Grenache	24	$74,411	$3,043	-2%	48	66%	72	$220,543
Lagrein					5	100%	5	$9,916
Malbec					0	100%	0	$600
Mataro/Mourvedre	3				64	95%	67	$165,688
Merlot	72	$62,966	$872	-20%	68	49%	141	$122,514
Montepulciano	6				8	58%	14	$28,920
Nebbiolo					1	100%	1	$3,264
Petit Verdot					6	100%	6	$8,048
Pinot Noir	147	$232,223	$1,576	-7%	9	6%	156	$245,876
Shiraz	1,018	$2,763,859	$2,715	3%	939	48%	1,957	$5,314,785
Tempranillo	21				13	39%	34	$67,180
Other red					6	100%	6	$10,646
Red Total	**1,417**	**$3,490,373**	**$2,464**	**-2%**	**1,570**	**53%**	**2,987**	**$7,413,140**
White								
Chardonnay	461	$803,927	$1,744	-0%	380	45%	841	$1,467,070
Gewürztraminer	7				4	40%	11	$13,190
Grüner Veltliner					5	100%	5	$10,331
Muscat à Petits Grains Blancs	22	$19,216	$878	0%	4	16%	26	$22,777
Pinot Gris/Grigio	81	$126,752	$1,558	8%	93	53%	175	$272,137
Riesling	1,029	$2,077,445	$2,020	1%	1,252	55%	2,281	$4,605,836
Roussanne	30				4	11%	34	$49,988
Sauvignon Blanc	22				39	64%	62	$74,118
Semillon	95	$71,430	$754	-1%	26	22%	121	$91,150
Viognier	87	$152,920	$1,767	-6%	64	42%	150	$265,339
Other white	17				27	61%	44	$77,550
White Total	**1,850**	**$3,360,330**	**$1,816**	**1%**	**1,899**	**51%**	**3,749**	**$6,949,486**
Grand Total	**3,267**	**$6,850,703**	**$2,097**	**-3%**	**3,469**	**51%**	**6,736**	**$14,362,626**

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				14	14
Cabernet Sauvignon			46	65	111
Grenache			1	23	24
Mataro/Mourvedre				3	3
Merlot	61	11			72
Montepulciano				6	6
Pinot Noir		61	67	20	147
Shiraz	25	81	279	633	1,018
Tempranillo				21	21
Red Total	**87**	**153**	**392**	**785**	**1,417**
White					
Chardonnay	4		393	64	461
Gewürztraminer		5	2		7
Muscat à Petits Grains Blancs	17	5			22
Pinot Gris/Grigio		23	58		81
Riesling		22	404	602	1,029
Roussanne		13	18		30
Sauvignon Blanc		22			22
Semillon	87	6	2		95
Viognier		30	29	28	87
Other white			17		17
White Total	**108**	**126**	**924**	**693**	**1,850**
Total purchased	**194**	**279**	**1,316**	**1,479**	**3,267**

Eden Valley

Current plantings by variety and year planted

	Area (hectares)					
Variety	Pre-2021	2021	2022	2023	Total area (Ha)	% planted in 2023
Red winegrapes						
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	334	0	0	0	334	0%
Grenache	26	5	2	1	34	3%
Mataro (Mourvedre)	16	0	0	0	16	0%
Merlot	49	0	0	0	49	0%
Montepulciano	5	0	0	0	5	0%
Petit Verdot	7	0	0	0	7	0%
Pinot Noir	54	0	0	0	54	0%
Shiraz	800	2	0	1	804	0%
Tempranillo	12	2	0	0	14	0%
Other Red	12	0	0	0	13	0%
Red winegrapes Total	**1,321**	**10**	**3**	**2**	**1,336**	**0%**
White winegrapes						
Chardonnay	239	0	0	0	239	0%
Muscat A Petit Grains Blanc (White Frontignac)	6	0	0	0	6	0%
Pinot Gris	38	2	0	3	43	7%
Riesling	517	4	4	7	532	1%
Sauvignon Blanc	35	0	0	0	35	0%
Semillon	15	0	0	0	15	0%
Traminer (Gewurztraminer)	14	0	0	0	14	0%
Viognier	32	0	0	0	32	0%
Other White	21	1	0	1	23	4%
White winegrapes Total	**918**	**8**	**4**	**11**	**940**	**1%**
Unknown variety	17	0	0	0	17	0%
All varieties Total	**2,256**	**17**	**6**	**13**	**2,292**	**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 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 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 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 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 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

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