

# SA Winegrape Crush Survey 2022

## Regional Summary Report

### Fleurieu other

*Fleurieu other in this report includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other vineyards in the Fleurieu zone that are outside the GI regions of McLaren Vale and Langhorne Creek.*

**Wine Australia July 2022**



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

Southern Fleurieu, Kangaroo Island  
Wine Regions and Fleurieu other



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# SA Winegrape Crush Survey 2022

## Regional Summary Report

### Kangaroo Island Wine Region

*Wine Australia July 2022*



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

Kangaroo Island  
Wine Region



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# Kangaroo Island

## 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>								
Cabernet Sauvignon					37	100%	37	\$50,342
Merlot					8	100%	8	\$7,534
Montepulciano					4	100%	4	\$8,309
Pinot Noir					2	100%	2	\$3,980
Shiraz	8				43	84%	52	\$125,924
Tempranillo	2						2	\$2,660
<b>Red Total</b>	<b>10</b>	<b>\$23,060</b>	<b>\$2,267</b>	<b>0%</b>	<b>95</b>	<b>90%</b>	<b>105</b>	<b>\$198,748</b>
<b>White</b>								
Chardonnay	1				11	90%	13	\$19,163
Pinot Gris/Grigio					11	100%	11	\$14,017
Riesling					10	100%	10	\$15,473
Roussanne					1	100%	1	\$1,050
Sauvignon Blanc	3				20	88%	23	\$34,032
Other white					1	100%	1	\$1,864
<b>White Total</b>	<b>4</b>				<b>54</b>	<b>93%</b>	<b>58</b>	<b>\$85,598</b>
<b>Grand Total</b>	<b>14</b>	<b>\$29,090</b>	<b>\$2,050</b>	<b>0%</b>	<b>149</b>	<b>91%</b>	<b>163</b>	<b>\$284,346</b>

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

# Kangaroo Island

## Current plantings by variety and year planted

Area (hectares)						Total % planted in 2021
Variety	Pre-2019	2019	2020	2021	area (Ha)	
Red winegrapes						
Cabernet Franc	4	0	0	0	4	0%
Cabernet Sauvignon	43	0	0	0	43	0%
Grenache	1	0	0	0	1	0%
Malbec	2	0	0	0	2	0%
Merlot	4	0	0	0	4	0%
Pinot Noir	1	0	0	0	1	0%
Shiraz	44	0	0	0	44	0%
Other Red	4	0	0	0	4	0%
Total red varieties	103	0	0	0	103	0%
White winegrapes						
Chardonnay	9	0	0	0	9	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	9	0	0	0	9	0%
Semillon	1	0	0	0	1	0%
Other White	4	0	0	0	4	0%
Total white varieties	27	0	0	0	27	0%
Unknown variety	16	0	0	0	16	0%
Total all varieties	146	0	0	0	146	0%

Source:  
Vinehealth  
Australia

# SA Winegrape Crush Survey 2022

## Regional Summary Report

## Southern Fleurieu Wine Region

*Wine Australia July 2022*



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

**Southern Fleurieu  
Wine Region**



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# Southern Fleurieu

## 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>								
Cabernet Sauvignon	107	\$101,231	\$946	-16%			107	\$101,231
Merlot	97						97	\$58,176
Pinot Noir	31						31	\$15,640
Shiraz	287	\$252,045	\$878	-27%			287	\$252,045
Tempranillo	25						25	\$53,930
<b>Red Total</b>	<b>547</b>	<b>\$481,022</b>	<b>\$879</b>	<b>-31%</b>			<b>547</b>	<b>\$481,022</b>
<b>White</b>								
Chardonnay	62	\$44,536	\$723	0%			62	\$44,536
Pinot Gris/Grigio	193	\$231,478	\$1,200	0%			193	\$231,478
Sauvignon Blanc	25						25	\$29,539
<b>White Total</b>	<b>279</b>	<b>\$305,552</b>	<b>\$1,095</b>	<b>12%</b>			<b>279</b>	<b>\$305,552</b>
<b>Grand Total</b>	<b>826</b>	<b>\$786,574</b>	<b>\$952</b>	<b>-22%</b>			<b>826</b>	<b>\$786,574</b>

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

# Southern Fleurieu

## Price dispersion – purchased grapes

Tonnes purchased in each segment					Total purchased
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	>\$2000	
Red					
Cabernet Sauvignon		91		16	107
Merlot		97			97
Pinot Noir	31				31
Shiraz		206	48	33	287
Tempranillo				25	25
Red Total	31	394	48	74	547
White					
Chardonnay	23	39			62
Pinot Gris/Grigio			193		193
Sauvignon Blanc			25		25
White Total	23	39	218		279
Total purchased	54	433	266	74	826



# Southern Fleurieu

## Current plantings by variety and year planted

Area (hectares)						
Variety	Pre-2019	2019	2020	2021	Total area (Ha)	% planted in 2021
Red varieties						
Cabernet Sauvignon	75	0	0	0	75	0%
Grenache	1	0	0	0	1	0%
Malbec	1	0	0	0	1	0%
Merlot	35	0	0	0	35	0%
Pinot Noir	25	0	0	0	25	0%
Shiraz	124	6	0	0	130	0%
Other Red	3	0	0	0	3	0%
Total red varieties	264	6	0	0	270	0%
White varieties						
Chardonnay	68	0	0	0	68	0%
Pinot Gris	24	1	0	0	25	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	61	0	0	0	61	0%
Savagnin	3	0	0	0	3	0%
Semillon	13	0	0	0	13	0%
Viognier	9	0	0	0	9	0%
Other White	1	1	0	0	2	0%
Total white varieties	182	2	0	0	184	0%
Total all varieties	446	8	0	0	454	0%

Source:  
Vinehealth  
Australia



# SA Winegrape Crush Survey 2022

## Regional Summary Report

### Fleurieu zone – other

*Wine Australia July 2022*



DATUM: GDA2020  
PROJECTION: SA Lambert  
DATE: 21<sup>st</sup> December 2021  
SOFTWARE: ESRI ArcGIS v10.8.1  
DATA SOURCE:  
Vineyard Block - Vinehealth Australia  
Wine Region - Wine Australia

**Fleurieu  
Wine Zone**



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# Fleurieu zone – other

## 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>								
Cabernet Sauvignon	264	\$263,948	\$998	-3%			264	\$263,948
Grenache	17						17	\$13,920
Malbec	6						6	\$6,300
Shiraz	499	\$433,765	\$869	-18%			499	\$433,765
<b>Red Total</b>	<b>787</b>	<b>\$717,933</b>	<b>\$912</b>	<b>-14%</b>			<b>787</b>	<b>\$717,933</b>
<b>White</b>								
Chardonnay	377	\$247,395	\$656	-10%			377	\$247,395
Pinot Gris/Grigio	190						190	\$171,432
Prosecco	18						18	\$13,718
Riesling	36						36	\$30,515
Sauvignon Blanc	224	\$215,276	\$961	9%			224	\$215,276
Semillon	46						46	\$36,901
<b>White Total</b>	<b>892</b>	<b>\$715,236</b>	<b>\$801</b>	<b>-5%</b>			<b>892</b>	<b>\$715,236</b>
<b>Grand Total</b>	<b>1,680</b>	<b>\$1,433,168</b>	<b>\$853</b>	<b>-11%</b>			<b>1,680</b>	<b>\$1,433,168</b>

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

# Fleurieu zone – other

## Price dispersion – purchased grapes

Tonnes purchased in each segment						
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	Total purchased
Red						
Cabernet Sauvignon	27		238			264
Grenache		17				17
Malbec			6			6
Shiraz		312	178		9	499
Red Total	27	329	422		9	787
White						
Chardonnay		377				377
Pinot Gris/Grigio			190			190
Prosecco		18				18
Riesling		36				36
Sauvignon Blanc		69	150	5		224
Semillon		46				46
White Total		547	341	5		892
Total purchased	27	876	763	5	9	1,680

# Fleurieu zone – other

Current plantings by variety and year planted

Area (hectares)					Total area (Ha)	% planted in 2021
Variety	Pre-2019	2019	2020	2021		
Red winegrapes						
Cabernet Sauvignon	36	0	0	0	36	0%
Grenache	1	0	0	0	1	0%
Shiraz	90	0	0	0	90	0%
Other Red	3	0	0	0	3	0%
Total red varieties	130	0	0	0	130	0%
White winegrapes						
Chardonnay	29	0	0	0	29	0%
Pinot Gris	16	0	0	0	16	0%
Riesling	2	0	0	0	2	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	7	0	0	0	7	0%
Total white varieties	67	0	0	0	67	0%
Unknown variety	34	0	0	0	34	0%
Total all varieties	231	0	0	0	231	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 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 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 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.

- 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](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>

## 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

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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.

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