



SA Winegrape Crush Survey 2023

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 2023

Southern Fleurieu, Kangaroo Island
 Wine Regions and Fleurieu other



DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth makes no representations, either express or implied, that the information displayed is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information displayed.

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
Red								
Cabernet Sauvignon					27	100%	27	\$38,561
Malbec					0	100%	0	\$618
Merlot					9	100%	9	\$8,803
Montepulciano					4	100%	4	\$8,982
Pinot Noir					5	100%	5	\$10,849
Shiraz					39	100%	39	\$61,658
Red Total					85	100%	85	\$129,471
White								
Chardonnay					8	100%	8	\$11,264
Pinot Gris/Grigio					18	100%	18	\$24,973
Roussanne					1	100%	1	\$2,178
Sauvignon Blanc					10	100%	10	\$14,773
Other white					3	100%	3	\$4,310
White Total					40	100%	40	\$57,498
Grand Total					124	100%	124	\$186,969

There were 4 respondents to the survey who reported crushing grapes from Kangaroo Island in 2023, compared with 6 in 2022.

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 area (Ha)	% planted in 2022
Variety	Pre-2020	2020	2021	2022		
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	4	0	0	0	4	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	105	0	0	0	105	0%
White winegrapes						
Chardonnay	9	0	0	0	9	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	2	0	0	0	2	0%
Sauvignon Blanc	9	0	0	0	9	0%
Semillon	1	0	0	0	1	0%
Other White	3	0	0	1	4	25%
Total white varieties	25	0	0	1	26	4%
Unknown variety	15	0	0	0	15	0%
Total all varieties	145	0	0	1	146	1%

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2023

Regional Summary Report

Southern Fleurieu Wine Region

Wine Australia July 2023



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**



DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth make no representations, either express or implied, that the information displayed is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information displayed.

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
Red								
Cabernet Sauvignon	65	\$74,206	\$1,138	20%			65	\$74,206
Pinot Noir	50						50	\$126,368
Shiraz	122	\$103,918	\$855	-3%			122	\$103,918
Tempranillo	2						2	\$5,616
Red Total	238	\$310,108	\$1,301	48%			238	\$310,108
White								
Chardonnay	25						25	\$14,421
Pinot Gris/Grigio	62						62	\$74,473
Sauvignon Blanc	48	\$61,918	\$1,282	0%			48	\$61,918
White Total	135	\$150,812	\$1,115	2%			135	\$150,812
Grand Total	374	\$460,920	\$1,234	30%			374	\$460,920

There were 8 respondents to the survey who reported crushing grapes from Southern Fleurieu in 2023, the same number as in 2022.

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						
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	Total purchased
Red						
Cabernet Sauvignon	20	27			18	65
Pinot Noir				30	20	50
Shiraz	64	37			20	122
Tempranillo					2	2
Red Total	85	64		30	60	238
White						
Chardonnay	17	9				25
Pinot Gris/Grigio			62			62
Sauvignon Blanc			48			48
White Total	17	9	110			135
Total purchased	101	73	110	30	60	374

Southern Fleurieu

Current plantings by variety and year planted

Area (hectares)						
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
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	27	0	0	0	27	0%
Shiraz	130	0	0	0	130	1%
Other Red	2	0	0	0	2	0%
Total red varieties	271	0	0	0	271	0%
White winegrapes						
Chardonnay	67	0	0	0	67	0%
Pinot Gris	25	0	8	0	25	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	3	0	0	0	3	0%
Total white varieties	181	0	0	0	181	0%
Total all varieties	452	0	0	0	452	0%

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2023

Regional Summary Report

Fleurieu zone - other

Wine Australia July 2023



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

**Fleurieu
Wine Zone**



DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth make no representations, either express or implied, that the information displayed is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information displayed.

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
Red								
Malbec	12						12	\$12,460
Shiraz	144	\$122,304	\$849	-2%			144	\$122,304
Red Total	156	\$134,764	\$861	-6%			156	\$134,764
White								
Chardonnay	242	\$154,836	\$641	-2%			242	\$154,836
Pinot Gris/Grigio	127						127	\$122,228
Prosecco	15						15	\$13,314
Riesling	33						33	\$28,271
Sauvignon Blanc	123						123	\$135,641
White Total	540	\$454,290	\$841	5%			540	\$454,290
Grand Total	696	\$589,054	\$846	-1%			696	\$589,054

There were 8 respondents to the survey who reported crushing grapes from Fleurieu Zone – other in 2023, compared with 10 in 2022.

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	>\$2000	Total purchased
Red					
Malbec			12		12
Shiraz	97		40	8	144
Red Total	97		52	8	156
White					
Chardonnay		242			242
Pinot Gris/Grigio			127		127
Prosecco		11	4		15
Riesling		33			33
Sauvignon Blanc			123		123
White Total		286	255		540
Total purchased	97	286	307	8	696

Fleurieu zone - other

Current plantings by variety and year planted

Variety	Area (hectares)				Total area % planted in	
	Pre-2020	2020	2021	2022	(Ha)	2022
Red winegrapes						
Cabernet Sauvignon	20	0	0	0	20	0%
Grenache	1	0	0	0	1	0%
Shiraz	67	0	0	0	67	0%
Other Red	3	0	0	0	3	0%
Total red varieties	91	0	0	0	91	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	4	0	0	0	4	0%
Total white varieties	64	0	0	0	64	0%
Unknown variety	1	0	0	0	1	0%
Total all varieties	156	0	0	0	156	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 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 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

This information has been made available to assist on the understanding that Wine Australia is not rendering professional advice. Wine Australia does not accept responsibility for the results of any actions taken on the basis of the information contained in this report, nor for the accuracy, currency or completeness of any material contained in it. Wine Australia expressly disclaims all and any liability and responsibility to any person in respect of consequences of anything done in respect of reliance, whether wholly or in part, upon this report.

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

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

