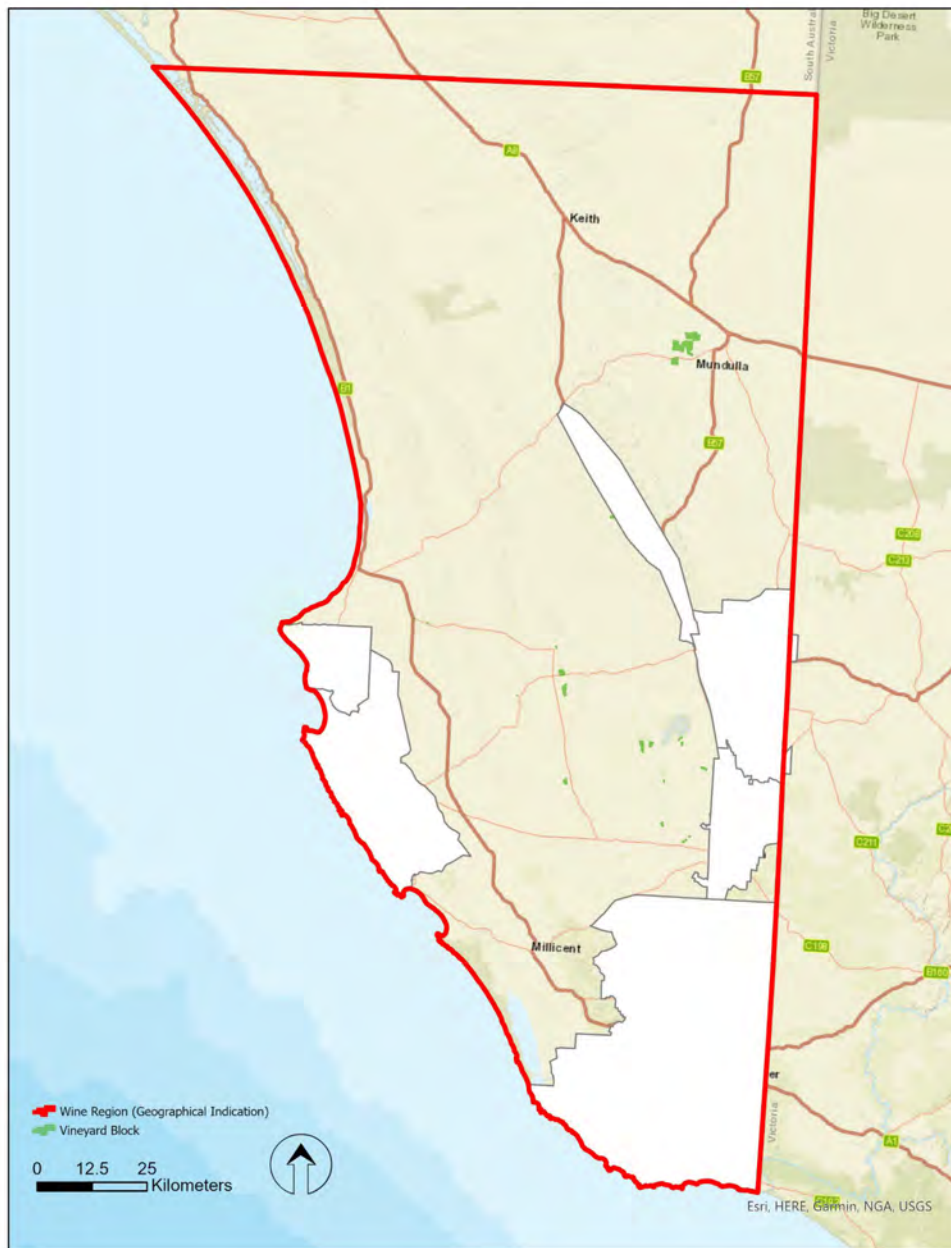


SA Winegrape Crush Survey 2023

Regional Summary Report

Limestone Coast zone - other

Wine Australia July 2023



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 06th July 2021
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

**Limestone Coast
Wine Zone**



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Limestone Coast 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								
Cabernet Franc	81				3	4%	85	\$104,102
Cabernet Sauvignon	490	\$505,320	\$1,032	49%	550	53%	1,039	\$1,072,632
Malbec	103						103	\$121,660
Mataro/Mourvedre	207						207	\$165,912
Merlot	590				498	46%	1,088	\$926,840
Montepulciano	6						6	\$9,735
Nebbiolo					2	100%	2	\$5,246
Petit Verdot	3				6	67%	9	\$16,272
Pinot Noir	97	\$163,199	\$1,690	11%	33	25%	129	\$218,218
Shiraz	1,168	\$1,363,004	\$1,167	42%	18	1%	1,185	\$1,383,758
Tempranillo	3				10	78%	13	\$18,466
Other red	58	\$61,938	\$1,062	17%			58	\$61,938
Red Total	2,805	\$3,002,473	\$1,070	37%	1,120	29%	3,925	\$4,104,779
White								
Chardonnay	416	\$352,713	\$849	2%	459	52%	875	\$742,378
Muscat à Petits Grains Blancs	9						9	\$4,725
Pinot Gris/Grigio	90	\$96,442	\$1,069	6%			90	\$96,442
Prosecco	16						16	\$22,194
Sauvignon Blanc	20						20	\$22,624
Semillon	23						23	\$17,588
Verdelho	10						10	\$5,055
White Total	585	\$521,340	\$891	-3%	459	44%	1,044	\$911,005
Grand Total	3,390	\$3,523,813	\$1,039	30%	1,579	32%	4,969	\$5,015,784

There were 13 respondents to the survey who reported crushing grapes from Limestone Coast zone – other in 2023, compared with 16 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.

Limestone Coast zone - other

Price dispersion – purchased grapes

Tonnes purchased in each segment					
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	Total purchased
Red					
Cabernet Franc			81		81
Cabernet Sauvignon	103	53	333		490
Malbec			103		103
Mataro/Mourvedre		207			207
Merlot		590			590
Montepulciano				6	6
Petit Verdot				3	3
Pinot Noir		18		79	97
Shiraz	132	103	933		1,168
Tempranillo			3		3
Other red		15	44		58
Red Total	235	985	1,496	88	2,805
White					
Chardonnay		298	118		416
Muscat à Petits Grains Blancs	9				9
Pinot Gris/Grigio			81	10	90
Prosecco			16		16
Sauvignon Blanc			20		20
Semillon		23			23
Verdelho	10				10
White Total	20	321	235	10	585
Total purchased	255	1,306	1,731	98	3,390

Limestone Coast 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 Franc	31	0	0	0	31	0%
Cabernet Sauvignon	707	0	0	0	707	0%
Malbec	21	0	2	0	23	0%
Merlot	259	0	0	0	259	0%
Petit Verdot	41	0	0	0	41	0%
Pinot Noir	11	0	0	0	11	0%
Shiraz	463	3	0	5	471	1%
Other Red	60	0	0	0	60	0%
Total red varieties	1,593	3	2	5	1,603	0%
White winegrapes						
Chardonnay	120	0	0	0	120	0%
Pinot Gris	13	0	0	0	13	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	17	0	0	0	17	0%
Semillon	3	0	0	0	3	0%
Other White	11	0	0	0	11	0%
Total white varieties	168	0	0	0	168	0%
Total all varieties	1,761	3	2	5	1,771	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

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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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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

