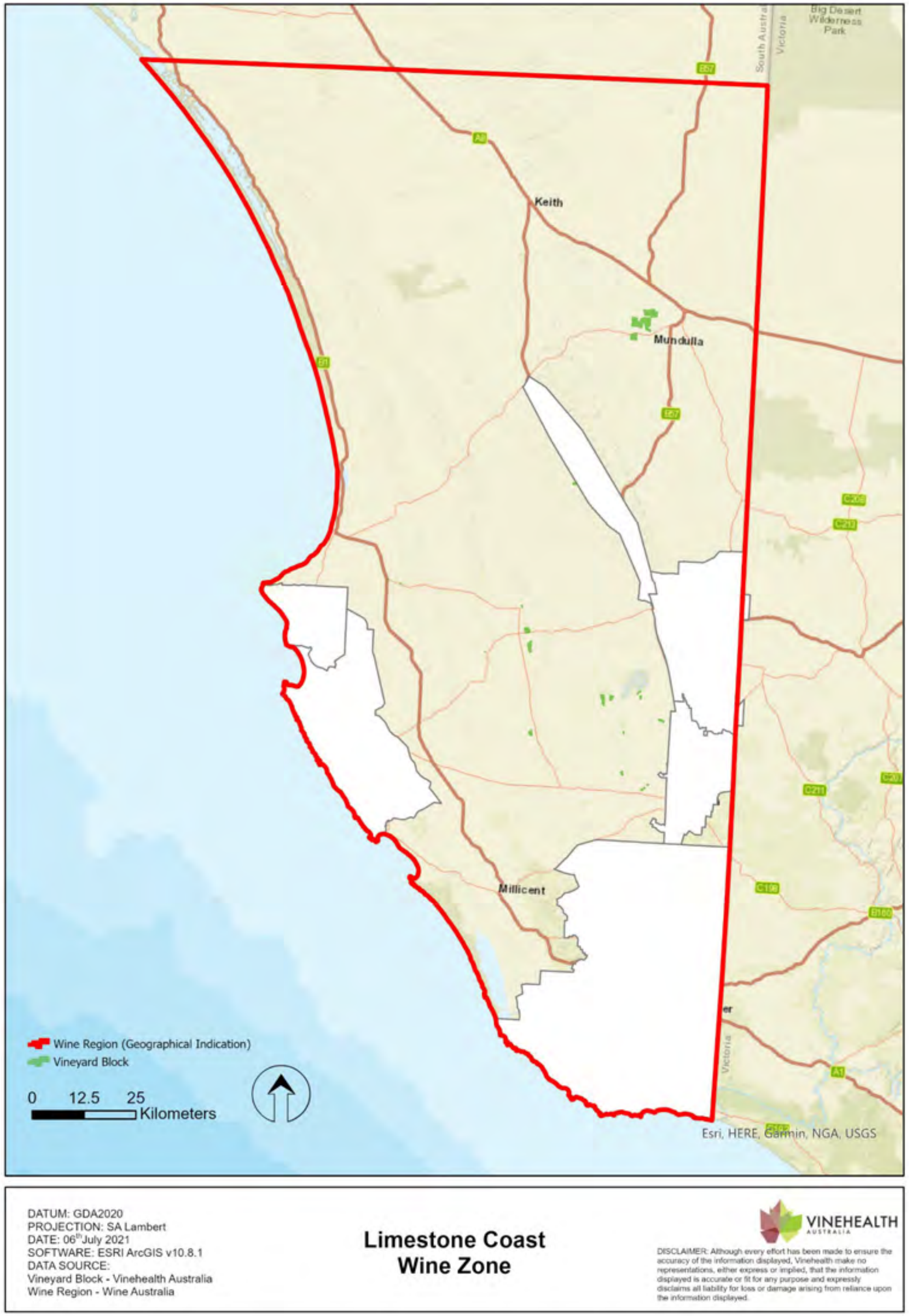

SA Winegrape Crush Survey 2024

Regional Summary Report

Limestone Coast zone - other

Limestone Coast zone - other includes any vineyards in the Limestone Coast zone that are outside the GI regions of Coonawarra, Padthaway, Wrattonbully, Mount Benson, Robe and Mount Gambier.

Wine Australia July 2024

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	73						73	$89,914
Cabernet Sauvignon	262	$287,212	$1,098	6%	114	30%	376	$412,335
Malbec	79						79	$93,552
Mataro/Mourvedre	199						199	$159,320
Merlot	605				46	7%	650	$554,210
Montepulciano	4						4	$6,112
Nebbiolo					2	100%	2	$4,144
Pinot Noir	31				31	51%	62	$52,483
Shiraz	1,127				3	0%	1,129	$1,392,999
Other red	57	$60,554	$1,063	0%			57	$60,554
Red Total	**2,436**	**$2,627,745**	**$1,079**	**1%**	**195**	**7%**	**2,631**	**$2,825,624**
White								
Chardonnay	264	$221,645	$840	-1%	30	10%	294	$246,838
Pinot Gris/Grigio	78						78	$100,660
Prosecco	14						14	$18,603
Sauvignon Blanc	41						41	$50,945
Semillon	32						32	$24,204
Vermentino	20						20	$14,333
White Total	**449**	**$430,390**	**$959**	**8%**	**30**	**6%**	**479**	**$455,583**
Grand Total	**2,884**	**$3,058,135**	**$1,060**	**2%**	**225**	**7%**	**3,109**	**$3,281,206**

There were 11 respondents to the survey who reported crushing grapes from Limestone Coast zone – other in 2024, compared with 13 in 2023.

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			73		73
Cabernet Sauvignon	29	47	176	10	262
Malbec			79		79
Mataro/Mourvedre		199			199
Merlot		605			605
Montepulciano				4	4
Pinot Noir		31			31
Shiraz		189	938		1,127
Other red		14	43		57
Red Total	**29**	**1,085**	**1,308**	**14**	**2,436**
White					
Chardonnay		264			264
Pinot Gris/Grigio			59	19	78
Prosecco			14		14
Sauvignon Blanc			41		41
Semillon		32			32
Vermentino		20			20
White Total		**317**	**113**	**19**	**449**
Total purchased	**29**	**1,401**	**1,421**	**33**	**2,884**

Limestone Coast zone - other

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	31	0	0	0	31	0%
Cabernet Sauvignon	580	0	0	0	580	0%
Malbec	22	2	0	0	24	0%
Merlot	162	0	0	0	162	0%
Petit Verdot	25	0	0	0	25	0%
Pinot Noir	11	5	0	16	32	50%
Shiraz	400	0	5	0	405	0%
Other Red	57	0	3	0	60	0%
Red winegrapes Total	**1,289**	**7**	**8**	**16**	**1,320**	**1%**
White winegrapes						
Chardonnay	116	0	0	0	116	0%
Pinot Gris	24	0	3	0	28	0%
Sauvignon Blanc	20	0	0	15	35	43%
Other White	15	0	7	0	22	0%
White winegrapes Total	**174**	**0**	**10**	**15**	**200**	**8%**
All varieties Total	**1,463**	**7**	**18**	**31**	**1,520**	**2%**

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

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:

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