



SA Winegrape Crush Survey 2024

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2024

DATUM: GDA2020
 PROJECTION: SA Lambert
 DATE: 15th February 2023
 SOFTWARE: ESRI ArcGIS v10.7.1
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

McLaren Vale Wine Region



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McLaren Vale

Vintage overview

VINTAGE REPORT

The McLaren Vale wine region experienced average winter rainfall and a mild winter. Early spring was drier than normal, characterised by higher-than-average daily temperatures and colder than average nights. These conditions led to frost damage in some low-lying vineyards, particularly in areas around Kangarilla and along Pedler Creek, and delayed budburst. On the positive side, the dry conditions resulted in low disease pressure.

From Mid-November rain fell and cool to mild temperatures combined to produce challenging climatic conditions when combined with a high wind event and an unusual day in November where some vineyard temperatures reached 40°C. Growers rallied to the challenges.

Capfall commenced in October and continued into November, with extended flowering as a result of cooler than normal temperatures. There were a couple of high rainfall events occurring at the end of November.

Summer was the wettest since 2002, with rainfall occurring through December and into January. Similar to 2023, rain eased in January and has not been felt again throughout autumn.

From late January 2024 temperatures climbed, and the combination of high temperatures and small bunches (due to poor set), resulted in a short period of veraison. Once again high winds plagued some pockets of the region and further reduced yield.

Hot dry conditions resulted in a compacted vintage; whites were picked in the first two weeks and the majority of reds harvested before an early Easter. The late ripening reds, including Grenache, were picked post-Easter. Grenache crops fared well this season, with good set and veraison occurring after the main heat extremes, and higher yields than most.

Jodie Armstrong, for McLaren Vale Grape, Wine and Tourism Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of McLaren Vale winegrapes in 2024 was 28,242 tonnes, up by 7 per cent compared with the prior year's crush. Over the past five years, the average reported crush for the McLaren Vale has been 32,108 tonnes, making this year's crush 12 per cent below the five-year (2019–2023) average.

There were a record 98 respondents to the survey who reported crushing grapes from McLaren Vale in 2024, compared with 86 in 2023.

The total value of winegrapes in McLaren Vale in 2024 was \$45.9 million, an increase of 1 per cent compared with 2023. The overall average value declined by 6 per cent from \$1,693 in 2023 to \$1,593 per tonne.

Of the major varieties, Grenache had the highest average value at \$2166 per tonne (down 11 per cent). Shiraz declined by 8 per cent to \$1589 per tonne, while Cabernet Sauvignon was down 3 per cent to \$1508 per tonne. These latter two varieties have both seen decreases of more than \$400 per tonne since 2020, while Grenache continued to increase until 2024.

The price dispersion data shows a downward shift, with 24 per cent of all grapes being purchased at \$2000 per tonne or above compared with 30 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in the McLaren Vale as at 30 April 2024 was 7,383 hectares, a net increase of 8 hectares compared with the previous year and 46 more than it was in 2019. The average vineyard size in McLaren Vale is 11.2 hectares, compared with the state average of 16.1 hectares.

There were 34 hectares of new plantings (including top-working and replacements) in the 2023–24 season, including 11 hectares of Grenache, 4 hectares of Sangiovese and 7 hectares of Fiano.

McLaren Vale

Winegrape intake summary table – red winegrapes

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	5						5	\$10,883
Cabernet Franc	20	\$46,557	\$2,327	24%	2	7%	22	\$50,235
Cabernet Sauvignon	2,847	\$4,293,829	\$1,508	-3%	1,829	39%	4,675	\$7,051,580
Durif	6				1	19%	8	\$11,535
Graciano	33	\$71,137	\$2,182	0%	10	23%	43	\$92,829
Grenache	1,065	\$2,307,767	\$2,166	-11%	1,575	60%	2,640	\$5,719,746
Malbec	1				14	93%	15	\$30,156
Mataro/Mourvedre	335	\$717,193	\$2,142	12%	233	41%	568	\$1,215,516
Merlot	309	\$319,790	\$1,035	-4%	156	34%	465	\$481,110
Montepulciano	20	\$38,030	\$1,877	-8%	33	62%	54	\$100,608
Muscat à Petits Grains Rouges	1				9	90%	10	\$16,736
Nebbiolo					3	100%	3	\$7,877
Nero d'Avola	16	\$30,671	\$1,942	-10%	35	69%	51	\$98,335
Petit Verdot	9				65	87%	74	\$107,781
Pinot Noir	261	\$363,740	\$1,392	-2%	26	9%	288	\$400,513
Sangiovese	250	\$485,374	\$1,945	1%	140	36%	389	\$756,763
Shiraz	10,544	\$16,756,418	\$1,589	-8%	5,164	33%	15,708	\$24,962,710
Tempranillo	180	\$340,320	\$1,886	-5%	124	41%	304	\$573,939
Touriga Nacional	42	\$85,764	\$2,048	-4%	46	52%	88	\$179,619
Other red	57	\$107,510	\$1,881	2%	145	72%	202	\$382,649
Red Total	16,002	\$26,001,510	\$1,625	-6%	9,609	38%	25,611	\$42,251,120

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

McLaren Vale

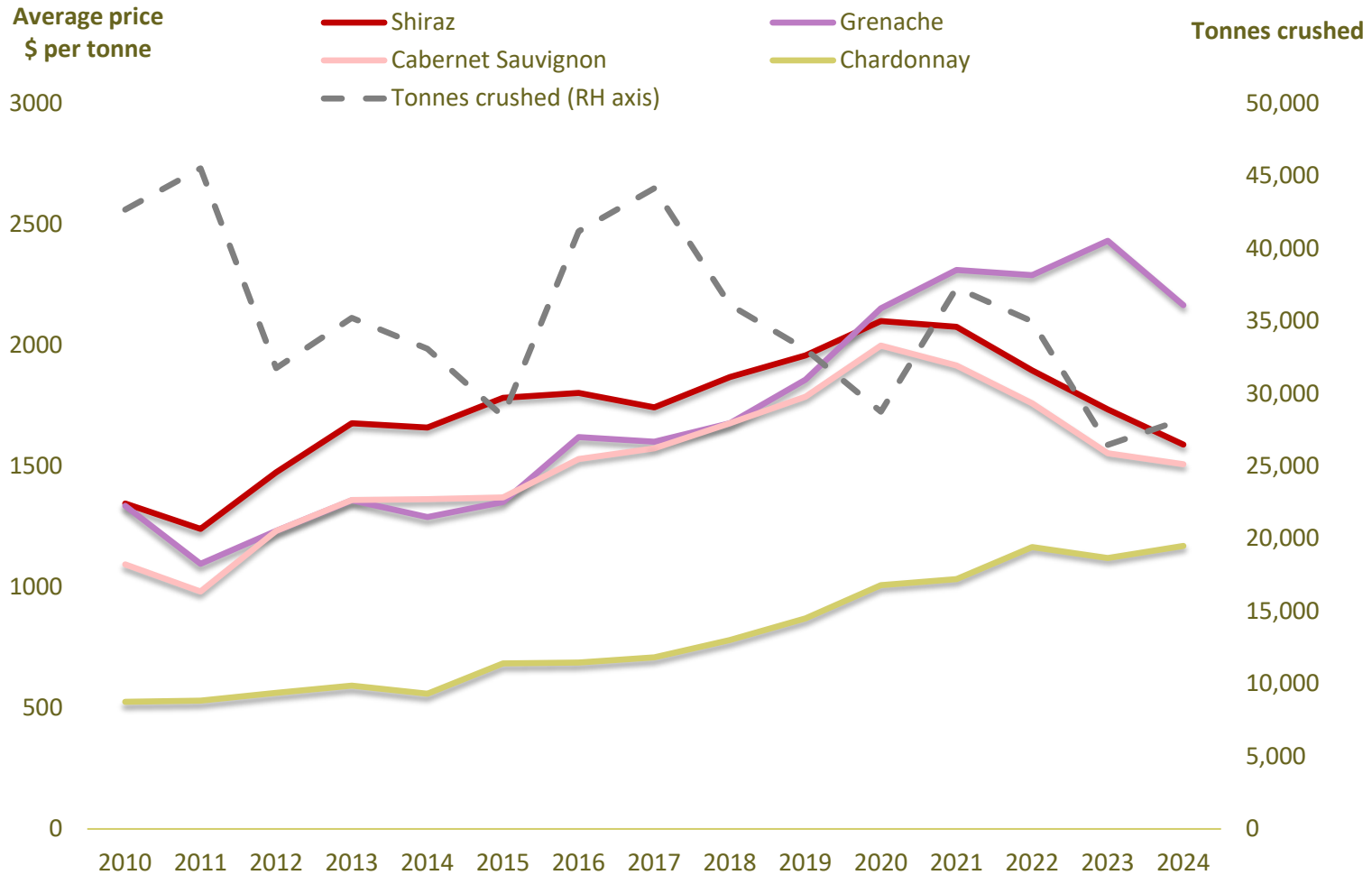
Winegrape intake summary table – white winegrapes

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
White								
Chardonnay	1,211	\$1,417,898	\$1,170	4%	183	13%	1,394	\$1,631,808
Chenin blanc	58	\$91,846	\$1,569	-30%			58	\$91,846
Fiano	129	\$215,712	\$1,668	-8%	112	46%	241	\$402,801
Gewürztraminer	6						6	\$5,990
Marsanne	36				16	31%	52	\$87,669
Muscat à Petits Grains Blancs	3				17	83%	20	\$38,874
Pinot Gris/Grigio					107	100%	107	\$151,608
Prosecco	9						9	\$15,470
Riesling	51				25	33%	76	\$111,585
Roussanne					21	100%	21	\$28,441
Sauvignon Blanc	17	\$36,101	\$2,154	47%	145	90%	162	\$348,044
Semillon					48	100%	48	\$57,824
Verdelho	66						66	\$74,690
Vermentino	42	\$82,246	\$1,969	2%	48	54%	90	\$177,490
Viognier	32				162	83%	194	\$328,634
Other white	20	\$36,437	\$1,858	-14%	67	77%	86	\$144,200
White Total	1,680	\$2,172,129	\$1,293	2%	951	36%	2,631	\$3,696,976
Grand Total	17,682	\$28,173,638	\$1,593	-6%	10,560	37%	28,242	\$45,948,096

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

McLaren Vale

Historical weighted average price vs tonnes crushed



McLaren Vale

Price dispersion – purchased grapes (red)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera					5	5
Cabernet Franc				8	12	20
Cabernet Sauvignon	16	43	1,442	1,007	338	2,847
Durif				6		6
Graciano				5	27	33
Grenache			167	246	653	1,065
Malbec					1	1
Mataro/Mourvedre			25	150	160	335
Merlot		97	185	25	2	309
Montepulciano				12	8	20
Muscat à Petits Grains Rouges				1		1
Nero d'Avola			2		13	16
Petit Verdot			9			9
Pinot Noir			208	35	18	261
Sangiovese				163	86	250
Shiraz	791	379	4,027	2,743	2,603	10,543
Tempranillo			34	49	97	180
Touriga Nacional				15	27	42
Other red				25	32	57
Red Total	807	520	6,100	4,490	4,084	16,001

McLaren Vale

Price dispersion – purchased grapes (white)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
White						
Chardonnay			1,087	89	35	1,211
Chenin blanc			4	42	12	58
Fiano			36	50	44	129
Gewürztraminer			6			6
Marsanne				36		36
Muscat à Petits Grains Blancs				3		3
Prosecco				9		9
Riesling			25	25		51
Sauvignon Blanc			1		16	17
Verdelho			66			66
Vermentino				14	28	42
Viognier			0	32		32
Other white		6		2	12	20
White Total		6	1,226	302	146	1,680
Total purchased	807	526	7,326	4,792	4,230	17,681

McLaren Vale

Current plantings by variety and year planted - reds

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Aglianico	5	1	0	1	7	14%
Barbera	12	0	0	0	12	0%
Cabernet Franc	21	0	0	0	21	0%
Cabernet Sauvignon	1,294	1	0	0	1,295	0%
Carignan	5	0	0	0	6	0%
Cinsault	3	0	1	0	4	0%
Durif (Petite Sirah)	5	0	0	0	5	0%
Graciano	6	0	0	0	6	0%
Grenache	468	19	14	11	512	2%
Malbec	13	0	0	0	13	0%
Mataro (Mourvedre)	95	2	1	0	97	0%
Mencia	6	0	1	0	7	0%
Merlot	176	0	0	0	176	0%
Montepulciano	19	0	0	1	20	5%
Nebbiolo	2	0	0	0	2	0%
Nero d'Avola	24	2	3	2	31	7%
Petit Verdot	41	0	0	0	41	0%
Pinot Noir	45	0	0	0	45	0%
Sagrantino	6	0	0	0	7	0%
Sangiovese	43	0	7	4	54	7%
Saperavi	3	0	0	2	5	40%
Shiraz	4,134	13	4	0	4,152	0%
Tempranillo	69	4	1	1	73	1%
Touriga	21	0	0	0	21	0%
Zinfandel	3	0	0	0	3	0%
Other Red	25	1	0	0	26	0%
Red winegrapes Total	6,546	43	31	22	6,641	0%

Source:
Vinehealth
Australia

McLaren Vale

Current plantings by variety and year planted – whites and others

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
White winegrapes						
Chardonnay	256	0	0	0	256	0%
Chenin Blanc	13	0	0	0	13	0%
Fiano	35	8	16	7	68	10%
Grenache Blanc	3	0	0	1	4	25%
Muscat A Petit Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris	23	3	0	0	26	0%
Riesling	26	0	0	0	26	0%
Roussanne	12	0	0	0	12	0%
Sauvignon Blanc	38	0	0	0	38	0%
Semillon	15	0	0	0	15	0%
Verdelho	15	0	0	0	15	0%
Vermentino	6	0	0	0	6	0%
Viognier	47	0	0	3	49	6%
Other White	30	1	1	1	33	3%
White winegrapes Total	529	12	18	12	571	2%
Unknown variety	165	0	0	0	165	0%
Rootstock	4	0	0	0	4	0%
Multi-purpose white	0	0	0	0	0	
Table red	0	0	0	0	0	
All varieties Total	7,245	56	48	34	7,383	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 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 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>

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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 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

