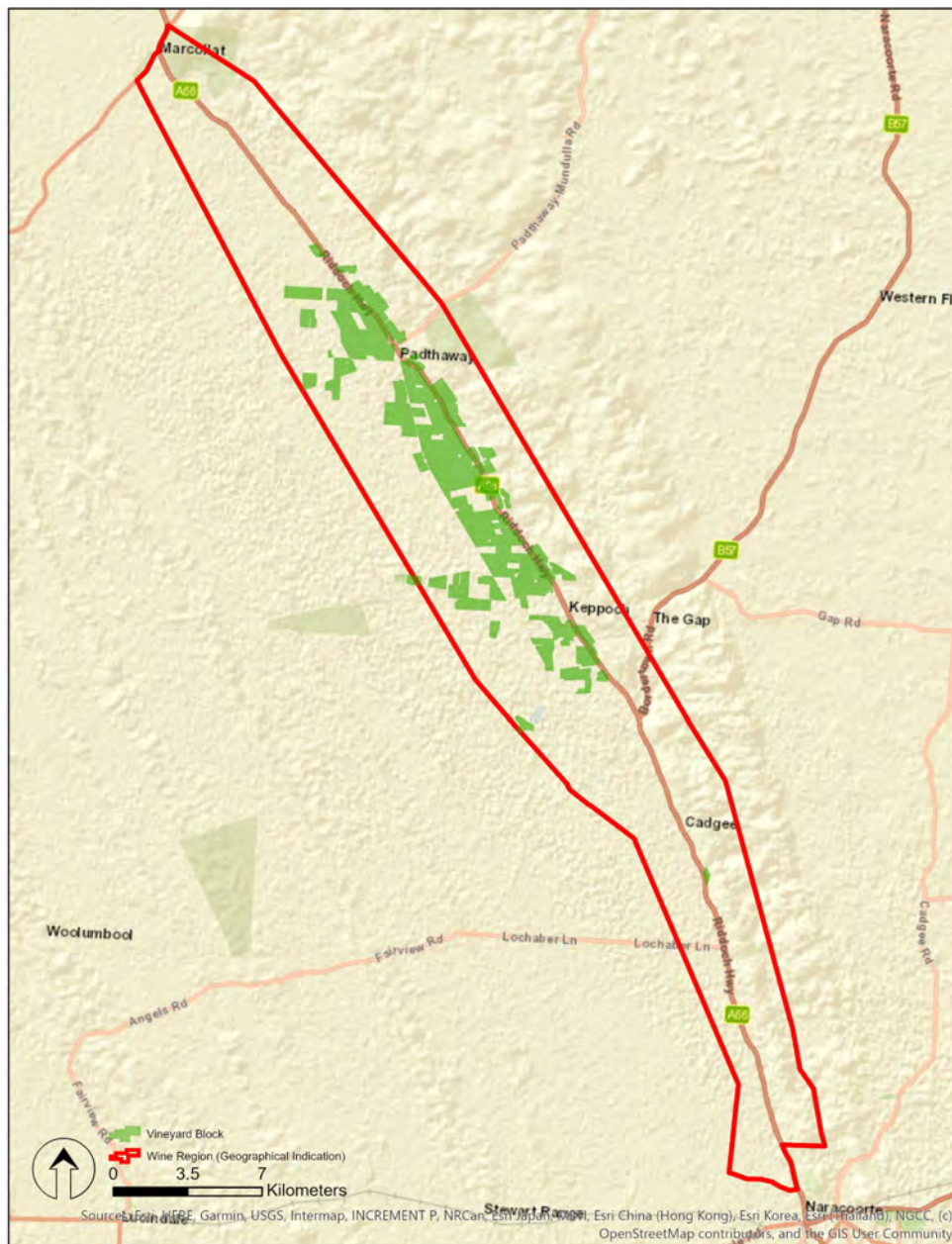


SA Winegrape Crush Survey 2022

Regional Summary Report

Padthaway 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

**Padthaway
Wine Region**



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Padthaway

Vintage overview

VINTAGE REPORT

Despite a cooler start to the 2022 season, flowering occurred around the same time as recent seasons. Average minimum and maximum temperatures for October and November 2021 were more than 1 degree below the long-term averages. Fortunately, these cooler conditions were not accompanied by increased frost.

Mild-to-warm temperatures towards the end of flowering were favourable to fruit set in red varieties, with Cabernet in particular performing better than in recent seasons.

The mild and dry conditions continued through December and, with vines under little stress, growers were able to manipulate shoot growth and bunch size as they desired. Low pest, disease and environmental pressure allowed bunches to develop cleanly.

By mid-January, vine development was about 10 – 14 days later than the previous season, however this changed quickly over veraison as a period of warm, humid weather brought vines back into line. Rain towards the end of January coincided with the conclusion of veraison. Although this is sometimes cause for concern, fruit remained in very good condition and vines were refreshed after a prolonged period of dry weather.

The first pick of “Vintage 2022” was underway at the beginning of February, with grapes taken for sparkling wine. The main harvest started a few weeks later, and finished with the last blocks of Cabernet being harvested in the first week of May.

Padthaway experienced ideal weather for ripening, enabling winemakers to select fruit at the optimum time. Early reports are that the flavours and quality observed in the field are coming through in the wine. Padthaway is known for consistent quality, but Vintage 2022 might still stand out.

*Krysteen McElroy, President
Padthaway Grape Growers Association*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Padthaway was 28,805 tonnes, 34 per cent below the 2021 vintage of 43,802 tonnes, which was the largest crush reported since 2016.

Over the past five years (up to 2021), the average crush for Padthaway has been 31,964 tonnes, making this year’s crush 10 per cent below the five-year average.

There were 17 respondents to the survey who reported crushing grapes from Padthaway in 2022, compared with 19 in 2021.

The total estimated value of winegrapes from Padthaway in 2022 was just over \$30.4 million, compared with \$43.5 million in 2021. The decrease in production was partly offset by an increase in the overall average value of grapes, which increased from \$984 in 2021 to \$1044 in 2022.

The main drivers of the overall increase were Cabernet Sauvignon (up 9 per cent to \$1211 per tonne), Chardonnay (up 8 per cent to \$759 per tonne) and Sauvignon Blanc (up 11 per cent to \$931 per tonne). Pinot Gris/Grigio was up 3 per cent to \$1030 per tonne and Shiraz was up 1 per cent to \$1172 per tonne.

Note: It has previously been found that Padthaway and Wrattenbully have larger adjustments made to their prices post-weighbridge than any other GI regions in South Australia, adding up to 30 per cent to the final value.

According to Vinehealth Australia data, the total vineyard area in Padthaway as at 30 April 2022 is 3978 hectares, compared with 4131 hectares in 2021 and 3889 hectares in 2017.

After a big season for new plantings last year, Padthaway had just 18 hectares of new plantings in 2021–22. Most of the new plantings were Shiraz (11 hectares) followed by Pinot Noir (4 hectares).

Padthaway

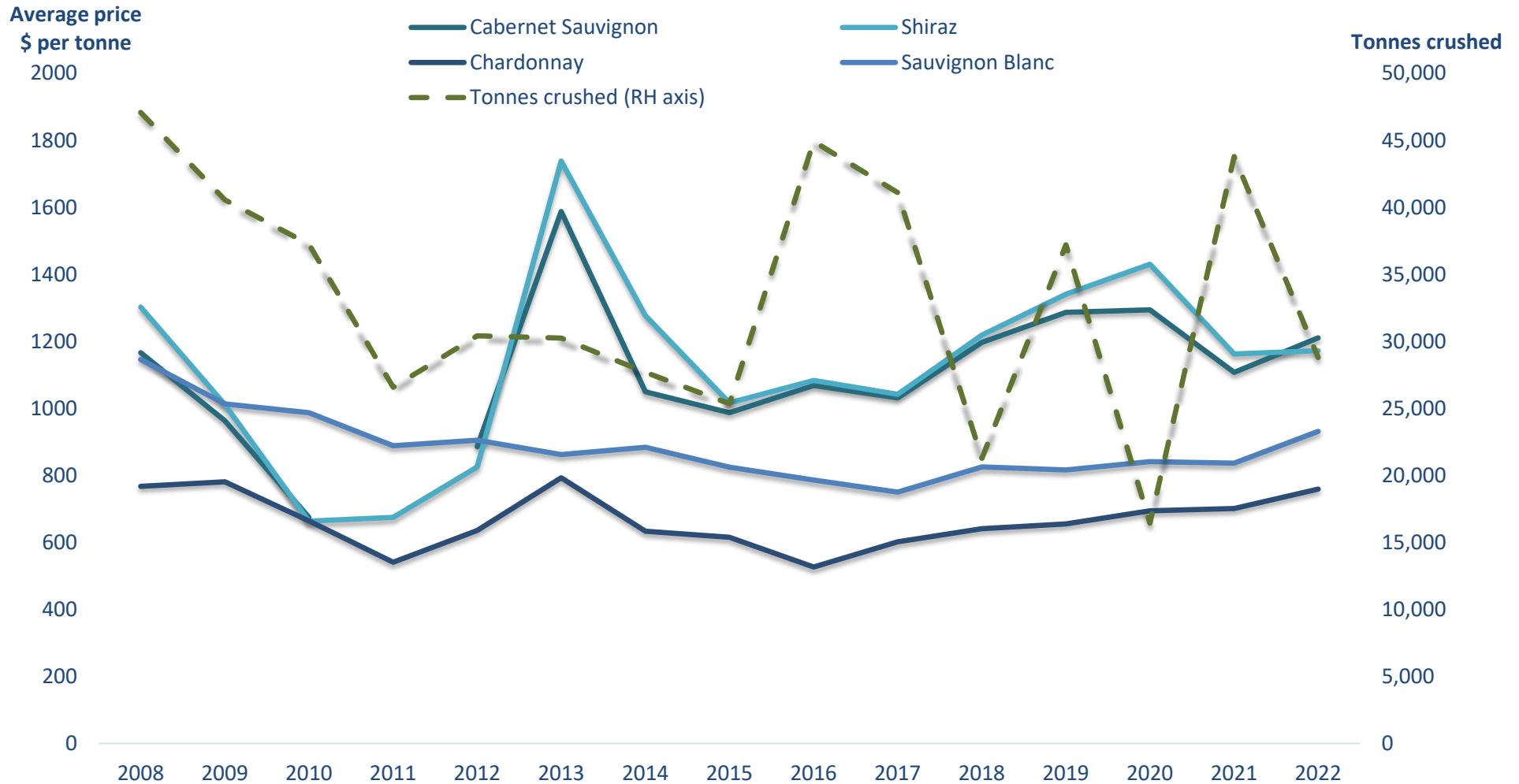
Winegrape intake summary table

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	3,969	\$4,807,210	\$1,211	9%	3,493	47%	7,462	\$9,037,469
Graciano	11						11	\$16,500
Malbec	134				1,091	89%	1,225	\$1,470,494
Merlot	403				723	64%	1,126	\$784,326
Pinot Noir	701	\$1,019,894	\$1,455	11%	98	12%	799	\$1,162,765
Sangiovese	48						48	\$94,088
Shiraz	4,666	\$5,467,734	\$1,172	1%	3,374	42%	8,040	\$9,420,924
Tempranillo	8						8	\$19,650
Red Total	9,940	\$11,866,606	\$1,194	4%	8,779	47%	18,719	\$22,006,217
White								
Chardonnay	4,532	\$3,441,410	\$759	8%	1,885	29%	6,417	\$4,872,698
Gewürztraminer	150						150	\$102,363
Pinot Gris/Grigio	1,578	\$1,624,428	\$1,030	3%			1,578	\$1,624,428
Riesling	183				701	79%	884	\$795,852
Sauvignon Blanc	828	\$771,308	\$931	11%	97	10%	925	\$861,433
Verdelho					74	100%	74	\$84,522
Viognier	54						54	\$53,960
Other white					4	100%	4	\$6,690
White Total	7,326	\$6,158,384	\$841	9%	2,761	27%	10,086	\$8,401,946
Grand Total	17,265	\$18,024,990	\$1,044	6%	11,540	40%	28,805	\$30,408,163

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

Padthaway

Historical weighted average price vs tonnes crushed



Padthaway

Price dispersion – purchased grapes

Tonnes purchased in each segment						
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	Total purchased
Red						
Cabernet Sauvignon	232	361	2,574	788	14	3,969
Graciano				11		11
Malbec			134			134
Merlot	115	179	108			403
Pinot Noir		101	280	320		701
Sangiovese				15	33	48
Shiraz	248	750	2,845	681	142	4,666
Tempranillo					8	8
Red Total	595	1,392	5,941	1,815	196	9,940
White						
Chardonnay		3,903	629			4,532
Gewürztraminer		150				150
Pinot Gris/Grigio			1,578			1,578
Riesling			183			183
Sauvignon Blanc		146	682			828
Viognier			54			54
White Total		4,200	3,126			7,326
Total purchased	595	5,592	9,068	1,815	196	17,265

Padthaway

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	968	85	78	0	1,131	
Malbec	78	0	0	0	78	
Merlot	167	0	0	0	167	
Pinot Noir	86	11	0	4	101	
Shiraz	1,133	44	133	11	1,321	
Other Red	15	0	1	0	16	
Total red varieties	2,447	140	212	15	2,814	1%
White winegrapes						
Chardonnay	733	0	0	3	736	
Pinot Gris	138	0	0	0	138	
Riesling	148	0	0	0	148	
Sauvignon Blanc	86	0	0	0	86	
Traminer (Gewurztraminer)	21	0	0	0	21	
Verdelho	19	0	0	0	19	
Other White	16	0	0	0	16	
Total white varieties	1,161	0	0	3	1,164	0%
Total all varieties	3,608	140	212	18	3,978	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 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, 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

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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