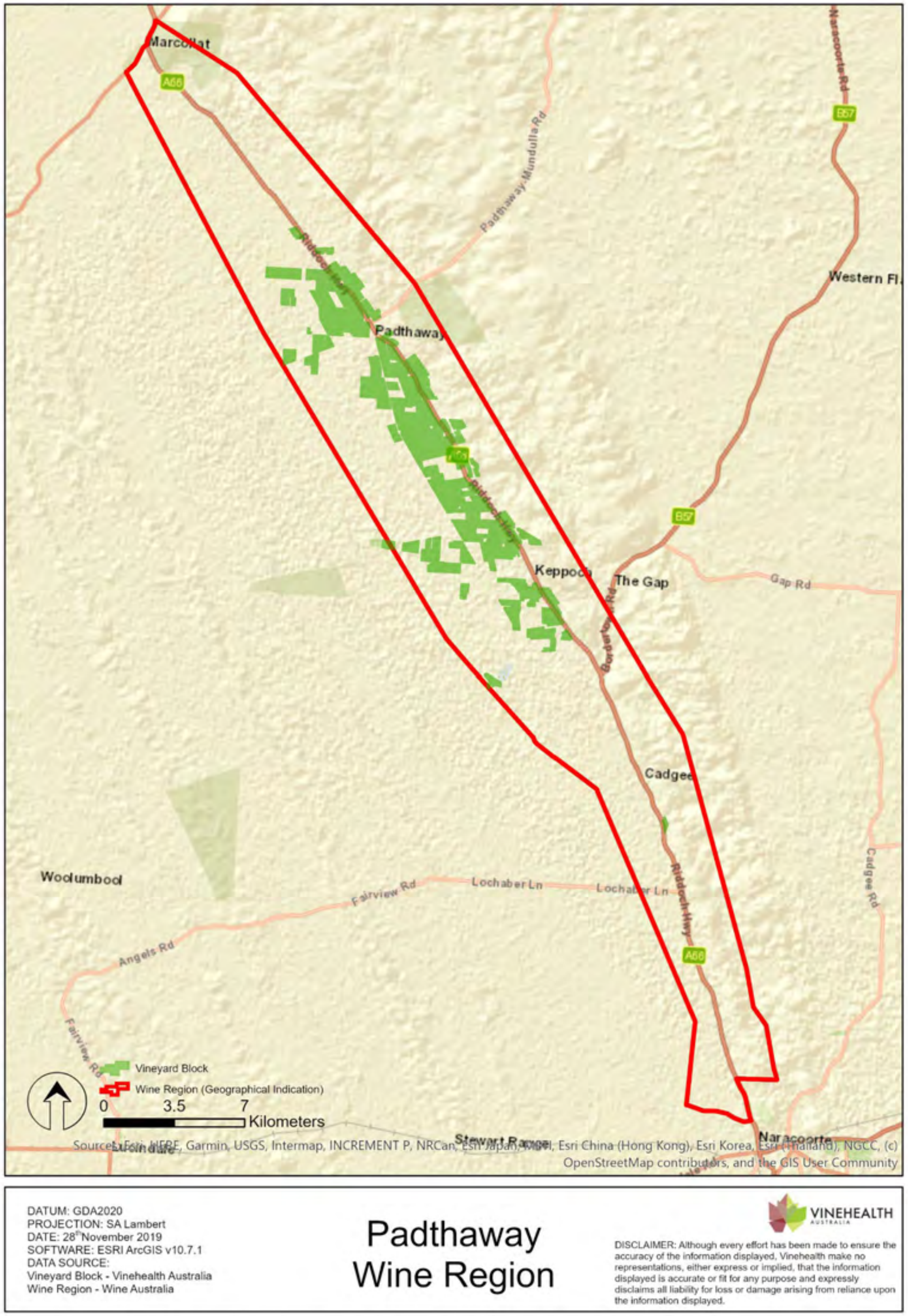


SA Winegrape Crush Survey 2023

Regional Summary Report

Padthaway Wine Region

Wine Australia July 2023

Padthaway

Vintage overview

VINTAGE REPORT

Despite the increased challenges growers faced in this season, overall Padthaway appears to have come through it well. Early indications are that we can expect fresh, rich wines with good depth and quality from Padthaway Vintage 2023 – definitely one to watch.

Early in the season, budburst and early development progressed as usual with the first signs of dormancy breaking in white varieties in mid-August. Chardonnay was typically through budburst in the first week of September, with Shiraz and Cabernet following over the next fortnight.

Increased rainfall and higher than average minimum temperatures through late October and early November significantly increased the risk of downy mildew. Due to the number of rain days being higher than normal, most growers had reduced opportunities for applying protective sprays and there was some yield loss seen, but this was quite limited.

Flowering and fruit set started around the expected time, but with the cooler weather we did experience an extended flowering period for the early varieties and flowering finished about 7 – 10 days later than usual.

Padthaway experienced more favourable weather into the New Year, with less than 9 mm rain recorded between Christmas and the end of January. There were only 12 days above 35°C for all of summer and because Padthaway didn't experience extended periods of hot weather, the pace of vine development gradually slipped further behind, and by the end of veraison the season was running about 10 to 14 days later than usual.

Harvesting of white varieties was well underway by the end of February, but some vineyards waited several weeks before the start of the red varieties, with the majority of growers continuing to harvest into early May.

Whilst Padthaway did experience some challenges, we are very excited to see the wines that have come out of this region in 2023.

Krysteen McElroy, Michael Zerk and Carolyn Brown
Padthaway Grape Growers Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Padthaway was 26,706 tonnes, 7 per cent below the 2022 vintage of 28,805 tonnes. Over the past five years (up to 2022), the average crush for Padthaway has been 29,505 tonnes, making this year's crush 9 per cent below the five-year average.

There were 16 respondents to the survey who reported crushing grapes from Padthaway in 2023, compared with 17 in 2022.

The total estimated value of winegrapes from Padthaway in 2023 was $27.4 million, compared with $30.4 million in 2022. In addition to the decline in production, there was a marginal decrease in average value of grapes, which was down from $1044 per tonne in 2022 to $1028 in 2023.

The overall decline was driven by the decrease in average value of the major red varieties; Shiraz was down 1 per cent to $1164 per tonne and Cabernet Sauvignon was down 9 per cent to $1104 per tonne. On the other hand, the major white varieties increased in average value; Chardonnay was up 8 per cent to $824 per tonne, Pinot Gris/Grigio was up 3 per cent to $1063 per tonne and Riesling was unchanged at $851 per tonne.

Overall, these counterbalancing trends meant that there was little change in the price dispersion.

According to Vinehealth Australia data, the total vineyard area in Padthaway as at 30 April 2023 was 3975 hectares, virtually no change from last year and 2 per cent more than the 3896 hectares in 2018.

After a big season for new plantings in 2021-22, Padthaway had virtually no new plantings in 2022-23.

Padthaway

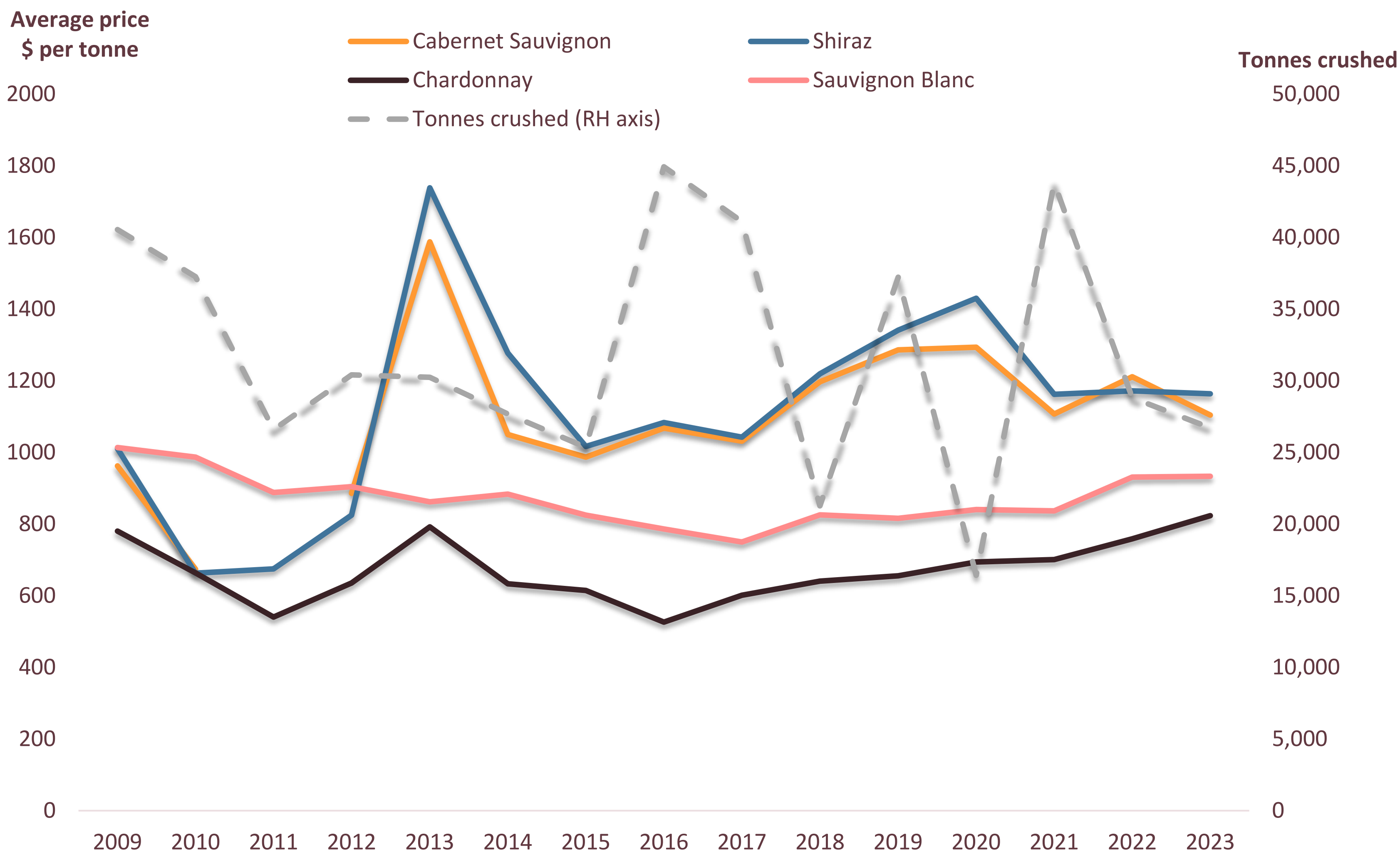
Winegrape intake summary table

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 Franc					64	100%	64	$96,645
Cabernet Sauvignon	4,261	$4,704,939	$1,104	-9%	1,645	28%	5,906	$6,521,453
Graciano	12						12	$18,880
Malbec	780						780	$916,067
Merlot	637				703	52%	1,340	$891,645
Pinot Meunier					2	100%	2	$5,002
Pinot Noir	597	$749,017	$1,255	-14%	19	3%	616	$772,503
Sangiovese	50	$95,726	$1,908	0%			50	$95,726
Shiraz	6,225	$7,244,826	$1,164	-1%	2,013	24%	8,238	$9,588,188
Tempranillo	4						4	$10,700
Red Total	**12,566**	**$14,163,948**	**$1,127**	**-6%**	**4,447**	**26%**	**17,013**	**$18,916,808**
White								
Chardonnay	4,775	$3,933,405	$824	8%	1,228	20%	6,003	$4,944,693
Gewürztraminer	82						82	$55,663
Pinot Gris/Grigio	1,417	$1,506,691	$1,063	3%	4	0%	1,422	$1,511,241
Riesling	1,129	$960,933	$851	0%			1,129	$960,933
Sauvignon Blanc	806	$752,506	$933	0%	114	12%	921	$859,313
Verdelho	68						68	$64,619
Viognier	57						57	$56,800
Other white					12	100%	12	$28,589
White Total	**8,334**	**$7,330,618**	**$880**	**5%**	**1,359**	**14%**	**9,693**	**$8,481,852**
Grand Total	**20,901**	**$21,494,566**	**$1,028**	**-1%**	**5,805**	**22%**	**26,706**	**$27,398,659**

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	577	243	2,680	761		4,261
Graciano				12		12
Malbec			780			780
Merlot	192	337	107			637
Pinot Noir		160	226	211		597
Sangiovese			5	17	28	50
Shiraz	459	963	3,795	919	90	6,225
Tempranillo					4	4
Red Total	**1,229**	**1,702**	**7,593**	**1,919**	**122**	**12,566**
White						
Chardonnay	22	3,188	1,565			4,775
Gewürztraminer		82				82
Pinot Gris/Grigio		51	1,366			1,417
Riesling		1,109	20			1,129
Sauvignon Blanc		159	647			806
Verdelho			68			68
Viognier			57			57
White Total	**22**	**4,590**	**3,723**			**8,334**
Total purchased	**1,250**	**6,292**	**11,317**	**1,919**	**122**	**20,901**

Padthaway

Current plantings by variety and year planted

Variety	Area (hectares) Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Sauvignon	1,051	78	0	0	1,129	0%
Merlot	161	0	0	0	161	0%
Pinot Noir	97	0	4	0	101	0%
Shiraz	1,175	133	11	0	1,319	0%
Other Red	96	0	0	4	100	4%
Total red varieties	**2,580**	**211**	**15**	**4**	**2,810**	**0%**
White winegrapes						
Chardonnay	734	0	3	0	737	0%
Pinot Gris	138	0	0	0	138	0%
Riesling	148	0	0	0	148	0%
Sauvignon Blanc	86	0	0	0	86	0%
Traminer (Gewurztraminer)	21	0	0	0	21	0%
Verdelho	19	0	0	0	19	0%
Other White	16	0	0	0	16	0%
Total white varieties	**1,162**	**0**	**3**	**0**	**1,165**	**0%**
Total all varieties	**3,742**	**211**	**18**	**4**	**3,975**	**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 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 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 the 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, 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

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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