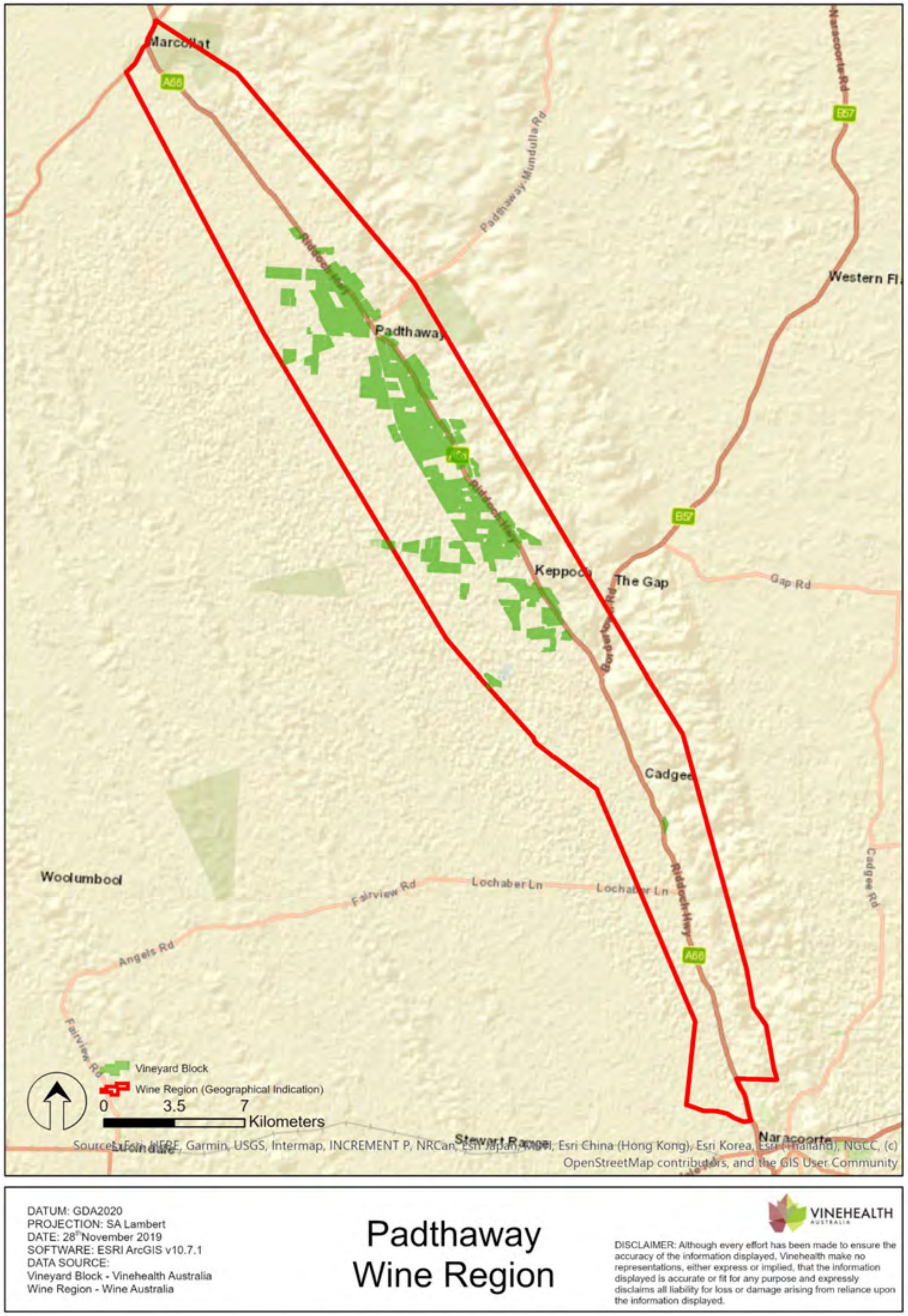


SA Winegrape Crush Survey 2024

Regional Summary Report

Padthaway Wine Region

Wine Australia July 2024

Padthaway

Vintage overview

VINTAGE REPORT

This year, 2024, marks a significant milestone for the Padthaway community. It is 60 years since the first grapevines were planted in Padthaway by the Seppelt family. Cabernet Sauvignon and Shiraz were planted at their Keppoch property, with a small area of these original vines still bearing fruit today. There are now over 30 vignerons and around 4,000 hectares of vineyard, with a wide selection of grape varieties being grown for regionally-branded labels and for sale to other wine companies.

Whilst Padthaway did experience some challenges this season, we are very excited to see the wines that have come out of the region in 2024 – they are showing plenty of promise in early feedback from winemakers and others in the know.

There were some challenges with the climate early in the season with Spring rainfall and the minimum temperatures being below average. This was followed by above-average rainfall in December/January and below-average temperatures, which assisted in maintaining good acid levels in the fruit. This was then followed by a very dry finish through February and March, which allowed for an extended ripening and also provided ideal conditions for harvesting fruit, with most being completed by end of March.

With yields being considered average across white varieties, the early reports are that quality looks very good, due to the cooler ripening conditions, which allowed the fruit to develop great flavour and acid balance, particularly Chardonnay, Pinot Gris and Sauvignon Blanc.

Red yields were generally below average; however, the quality also looks to be very good, with Cabernet Sauvignon and Shiraz looking particularly strong.

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

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Padthaway winegrapes in 2024 was 28,282 tonnes, up by 6 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for Padthaway has been 30,591 tonnes, making this year's crush 8 per cent below the five-year average.

There were 17 respondents to the survey who reported crushing grapes from Padthaway in 2024, compared with 16 in 2023.

The total value of winegrapes in 2024 was $31 million, compared with $27 million in 2023, an increase of 13 per cent. This was a result of an increase in the overall average value (up by 6 per cent from $1,028 per tonne in 2023 to $1,086 per tonne) in addition to the increase in crush.

There were increases in the average value of both major red varieties; Shiraz up 12 per cent to $1305 per tonne and Cabernet Sauvignon up 13 per cent to $1251 per tonne. On the other hand, the major white varieties decreased in average value; Chardonnay down 1 per cent to $818 per tonne, Pinot Gris/Grigio down 5 per cent to $1008 per tonne and Riesling down 1 per cent to $846 per tonne.

The price dispersion data shows a slight upward shift, with only 2 per cent of all grapes being purchased at below $600 per tonne, compared with 6 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in Padthaway as at 30 April 2024 was 3,982 hectares, an increase of 7 hectares compared with the previous year and 101 more than it was in 2019. The average vineyard size in Padthaway is 68.6 hectares, compared with the state average of 16.1 hectares.

There were 10 hectares of new vines planted in the region in the 2023–24 season compared with 38 in the previous season. All the new plantings were Sauvignon Blanc, resulting in a 10 per cent increase in the area of that variety.

Padthaway

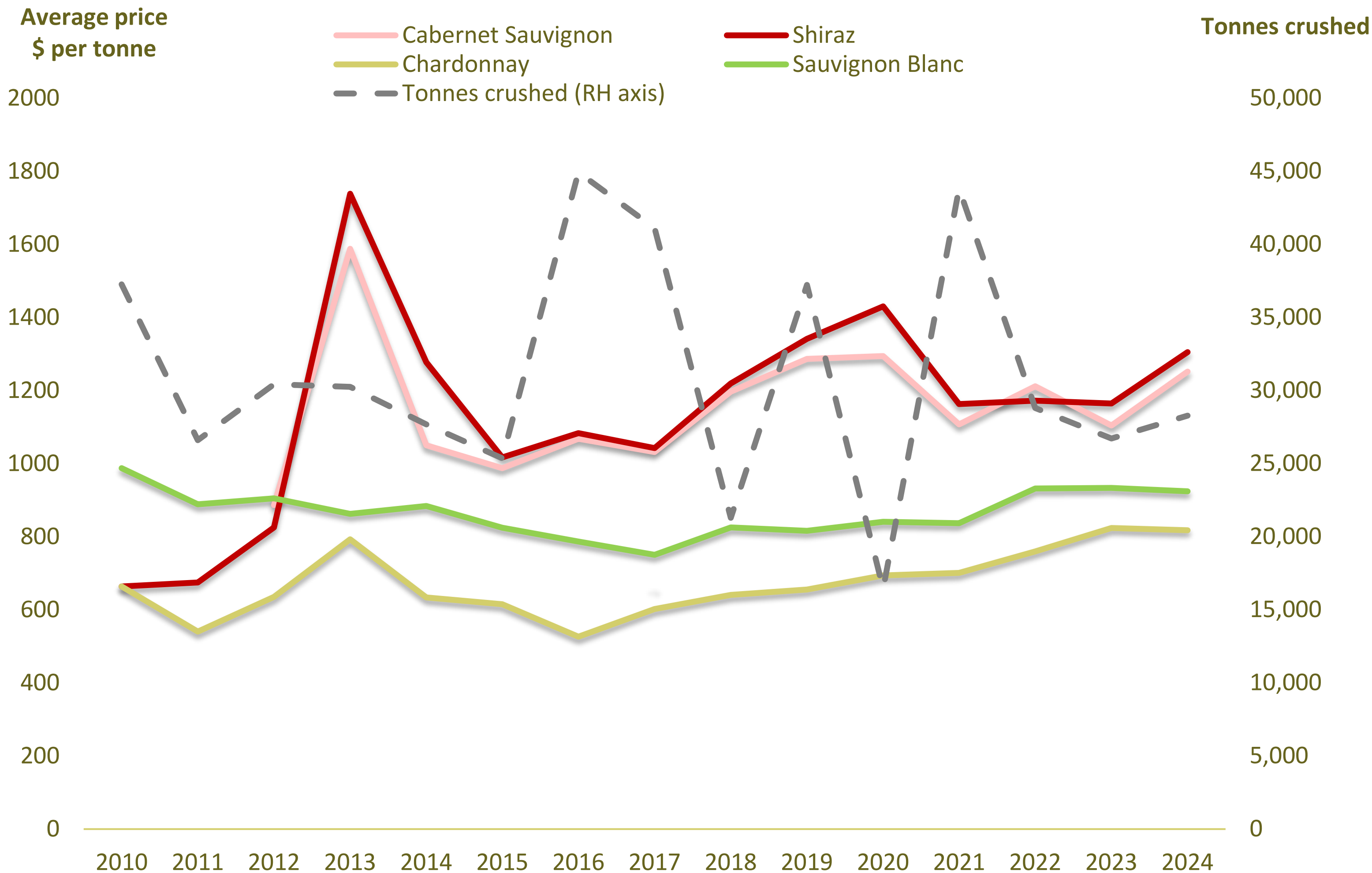
Winegrape intake summary table

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					76	100%	76	$122,660
Cabernet Sauvignon	4,124	$5,160,736	$1,251	13%	1,758	30%	5,883	$7,360,959
Graciano	6						6	$8,400
Malbec	1,242						1,242	$1,473,437
Merlot	674				759	53%	1,433	$1,060,160
Petit Verdot					4	100%	4	$5,153
Pinot Meunier					1	100%	1	$2,207
Pinot Noir	868	$1,235,587	$1,424	14%	23	3%	891	$1,268,651
Sangiovese	50	$56,570	$1,121	-41%			50	$56,570
Shiraz	5,631	$7,345,707	$1,305	12%	1,882	25%	7,513	$9,800,770
Tempranillo	5						5	$11,900
Red Total	**12,600**	**$15,791,159**	**$1,253**	**11%**	**4,503**	**26%**	**17,103**	**$21,170,868**
White								
Chardonnay	5,075	$4,149,430	$818	-1%	1,189	19%	6,265	$5,121,974
Gewürztraminer	73						73	$47,228
Pinot Gris/Grigio	2,088	$2,103,963	$1,008	-5%			2,088	$2,103,963
Riesling	1,526	$1,290,320	$846	-1%			1,526	$1,290,320
Sauvignon Blanc	977	$902,399	$924	-1%	80	8%	1,056	$975,939
Verdelho	115						115	$108,908
Viognier	53						53	$52,900
Other white					4	100%	4	$8,325
White Total	**9,906**	**$8,655,147**	**$874**	**-1%**	**1,273**	**11%**	**11,179**	**$9,709,558**
Grand Total	**22,506**	**$24,446,307**	**$1,086**	**6%**	**5,776**	**20%**	**28,282**	**$30,880,427**

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	42	338	2,731	1,013		4,124
Graciano			6			6
Malbec			1,242			1,242
Merlot	112	563				674
Pinot Noir			440	428		868
Sangiovese			50			50
Shiraz	245	493	3,843	727	323	5,631
Tempranillo					5	5
Red Total	**398**	**1,394**	**8,311**	**2,169**	**328**	**12,600**
White						
Chardonnay		3,944	1,132			5,075
Gewürztraminer		68	5			73
Pinot Gris/Grigio		249	1,838			2,088
Riesling		1,526				1,526
Sauvignon Blanc		209	768			977
Verdelho			115			115
Viognier			53			53
White Total		**5,996**	**3,910**			**9,906**
Total purchased	**398**	**7,390**	**12,221**	**2,169**	**328**	**22,506**

Padthaway

Current plantings by variety and year planted

	Area (hectares)					
Variety	Pre-2021	2021	2022	2023	Total area (Ha)	% planted in 2023
Red winegrapes						
Cabernet Sauvignon	1,112	0	0	0	1,112	0%
Malbec	78	0	0	0	78	0%
Merlot	144	0	0	0	144	0%
Pinot Noir	97	4	22	0	123	0%
Shiraz	1,317	11	2	0	1,330	0%
Other Red	18	0	10	0	28	0%
Red winegrapes Total	**2,766**	**15**	**35**	**0**	**2,815**	**0%**
White winegrapes						
Chardonnay	734	3	0	0	737	0%
Pinot Gris	138	0	0	0	138	0%
Riesling	148	0	0	0	148	0%
Sauvignon Blanc	86	0	4	10	99	10%
Traminer (Gewurztraminer)	21	0	0	0	21	0%
Other White	23	0	0	0	23	0%
White winegrapes Total	**1,149**	**4**	**4**	**10**	**1,166**	**1%**
All varieties Total	**3,915**	**18**	**38**	**10**	**3,982**	**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 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

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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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