

SA Winegrape Crush Survey 2023

Regional Summary Report

Riverland Wine Region

Wine Australia July 2023



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 1st June 2021
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Riverland
Wine Region



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Riverland

Vintage overview

VINTAGE REPORT

Record spring rainfall and a long cool ripening period saw vintage 2023 commencing mid-February, and finishing mid-May, which made it the latest vintage season this century. It is also expected to be the smallest vintage this century.

A combination of yield restrictions applied to the major red varieties due to winery capacity constraints, vineyards being rested, and difficulty ripening due to the weather and large canopies, resulted in significant reductions in particularly the Shiraz and Cabernet Sauvignon tonnages crushed.

There were also rejections of grapes for powdery mildew due to one of the coldest springs on record, frequent rain events between sprays, difficulty gaining access to vineyards and short supply of wettable sulphur.

The record wet spring rainfalls also provided ideal conditions for downy mildew – however good disease management strategies by growers saw most infections controlled, although some varieties suffered yield losses.

Overall, growers faced very challenging conditions but managed them well. The cool season provided an opportunity for exceptional flavour development, which should result in some great quality wines from the region that match contemporary consumer taste preferences.

Charles Matheson
Grower Engagement Officer, Riverland Wine

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from the Riverland was 410,888 tonnes in 2023, down 19 per cent compared with the 2022 crush of 506,769 tonnes. The 2023 crush was the lowest recorded for the past decade.

Over the past five years (up to 2022), the average crush for the Riverland has been 489,581 tonnes, making the 2023 crush 16 per cent below the average.

There were 59 respondents to the survey who reported crushing grapes from the Riverland in 2023, compared with 63 in 2022.

The total estimated value of winegrapes from the Riverland in 2023 was just over \$134 million compared with just under \$197 million in 2022, a decrease of \$62 million (32 per cent). The smaller crush size was compounded by a 19 per cent overall decrease in the average purchase value of grapes, which decreased from \$391 per tonne in 2022 to \$318.

All varieties decreased in average value, with red varieties decreasing by more than white varieties. Shiraz was down 35 per cent to \$224 per tonne, Cabernet Sauvignon was down 34 per cent to \$224 per tonne and Merlot was down 38 per cent to \$206 per tonne. Pinot Noir was only down 8 per cent (to \$666 per tonne). In the whites, Chardonnay decreased by 11 per cent to \$372 per tonne and Colombard decreased by 14 per cent to \$281 per tonne. Both Sauvignon Blanc and Muscat Gordo Blanco decreased by 5 per cent.

According to Vinehealth Australia data, the total vineyard area in the Riverland as at 30 April 2023 was 20,446 hectares, compared with 20,553 hectares in 2022 and 20,375 five years ago. There were 102 hectares of new plantings (including top-working and replacements) in the 2022-23 planting season, of which 26 hectares was Chardonnay, 13 hectares was Sauvignon Blanc and 6 hectares was Prosecco.

Riverland

Winegrape intake summary table – reds

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	4						4	\$876
Cabernet Franc	5				3	37%	7	\$1,781
Cabernet Sauvignon	34,006	\$7,632,023	\$224	-34%	10,799	24%	44,806	\$10,055,735
Durif	1,339	\$519,415	\$388	-25%	169	11%	1,509	\$585,097
Graciano	24	\$23,226	\$972	0%			24	\$23,226
Grenache	3,501	\$1,692,910	\$484	-22%	155	4%	3,656	\$1,768,072
Lagrein	9						9	\$8,698
Malbec	144				302	68%	447	\$145,150
Mataro/Mourvedre	2,163	\$901,930	\$417	-16%	165	7%	2,327	\$970,724
Merlot	15,644	\$3,219,144	\$206	-38%	8,398	35%	24,042	\$4,947,312
Montepulciano	108	\$57,671	\$534	-15%	41	28%	149	\$79,551
Muscat à Petits Grains Rouges	253	\$104,008	\$411	-10%	1	0%	254	\$104,213
Nebbiolo	1						1	\$275
Nero d'Avola	3						3	\$6,008
Petit Verdot	5,938	\$1,263,597	\$213	-38%	5,991	50%	11,929	\$2,538,356
Pinot Meunier	1						1	\$330
Pinot Noir	5,567	\$3,705,776	\$666	-8%	646	10%	6,213	\$4,135,886
Ruby Cabernet	727	\$196,639	\$270	-26%	922	56%	1,650	\$445,900
Sangiovese	103				672	87%	775	\$277,783
Shiraz	74,138	\$16,619,026	\$224	-35%	32,101	30%	106,239	\$23,814,408
Tempranillo	603	\$241,863	\$401	-19%	163	21%	766	\$307,385
Touriga Nacional	35				95	73%	131	\$52,084
Other red	2,488	\$1,009,061	\$406	-4%	9,423	79%	11,911	\$10,430,370
Red Total	146,804	\$37,301,666	\$254	-31%	70,047	32%	216,851	\$60,699,221

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

Riverland

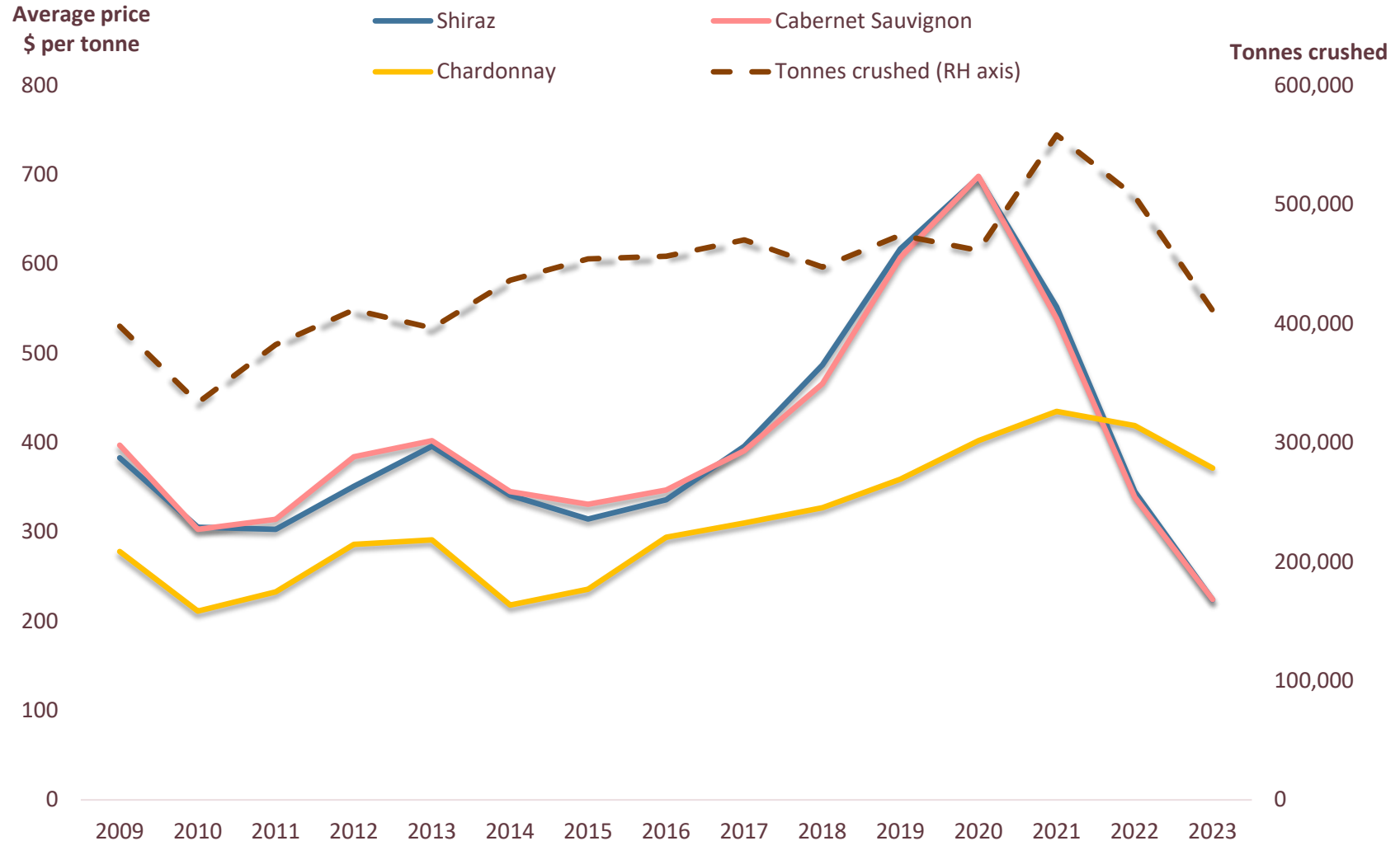
Winegrape intake summary table – whites

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	82,506	\$30,655,895	\$372	-11%	14,757	15%	97,263	\$36,139,065
Chenin blanc	1,235	\$400,675	\$325	-3%			1,235	\$400,675
Colombard	20,228	\$5,686,085	\$281	-14%	2,173	10%	22,400	\$6,296,818
Fiano	152	\$73,699	\$485	0%			152	\$73,699
Gewürztraminer	664	\$253,519	\$382	-3%	1,405	68%	2,069	\$790,151
Grüner Veltliner	2				107	98%	109	\$33,333
Muscat à Petits Grains Blancs	2,059	\$650,565	\$316	-5%	247	11%	2,306	\$728,609
Muscat Gordo Blanco	19,628	\$5,896,311	\$300	-5%	3,357	15%	22,985	\$6,904,856
Pinot Gris/Grigio	6,638	\$3,576,119	\$539	-3%	2,172	25%	8,810	\$4,746,105
Prosecco	320	\$230,978	\$721	-13%			320	\$230,978
Riesling	1,265	\$445,498	\$352	-1%	367	22%	1,632	\$574,762
Roussanne	3						3	\$921
Sauvignon Blanc	17,042	\$9,329,756	\$547	-5%	4,113	19%	21,155	\$11,581,427
Semillon	4,449	\$1,509,238	\$339	-8%	4,020	47%	8,469	\$2,872,824
Verdelho	789	\$229,459	\$291	-9%	1,012	56%	1,801	\$523,515
Vermentino	348	\$185,696	\$534	-6%	317	48%	666	\$355,245
Viognier	1,455	\$673,720	\$463	-7%	400	22%	1,856	\$859,029
Other white	582	\$236,396	\$406	-3%	225	28%	807	\$423,850
White Total	159,366	\$60,035,143	\$377	-9%	34,672	18%	194,038	\$73,535,860
Grand Total	306,170	\$97,336,809	\$318	-19%	104,718	25%	410,888	\$134,235,080

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

Riverland

Historical weighted average price vs tonnes crushed



Riverland

Price dispersion – purchased grapes (red)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera	4					4
Cabernet Franc	5					5
Cabernet Sauvignon	33,770	168	68			34,006
Durif	1,205	123	12			1,339
Graciano	3		21			24
Grenache	2,896	546	49	9		3,501
Lagrein	3		5			9
Malbec	144					144
Mataro/Mourvedre	1,774	374	15			2,163
Merlot	15,644					15,644
Montepulciano	77		32			108
Muscat à Petits Grains Rouges	253					253
Nebbiolo	1					1
Nero d'Avola					3	3
Petit Verdot	5,888	49	1			5,938
Pinot Meunier	1					1
Pinot Noir	355	4,751	461			5,567
Ruby Cabernet	709	19				727
Sangiovese	103					103
Shiraz	72,442	1,026	670			74,138
Tempranillo	410	181	13			603
Touriga Nacional	35					35
Other red	2,132	346	3	4	2	2,488
Red Total	137,854	7,582	1,349	14	5	146,804

Riverland

Price dispersion – purchased grapes (white)

Tonnes purchased in each segment						
Varieties	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	Total purchased
White						
Chardonnay	81,867	272	366			82,506
Chenin blanc	1,146	89				1,235
Colombard	20,209	18				20,228
Fiano	143		5		4	152
Gewürztraminer	664					664
Grüner Veltliner	2					2
Muscat à Petits Grains Blancs	2,059					2,059
Muscat Gordo Blanco	19,628					19,628
Pinot Gris/Grigio	5,071	1,567				6,638
Prosecco	2	318				320
Riesling	1,178	78	9			1,265
Roussanne	3					3
Sauvignon Blanc	14,189	2,833	19			17,042
Semillon	4,370	79				4,449
Verdelho	789					789
Vermentino	171	164	13			348
Viognier	1,299		156			1,455
Other white	565		9	4	5	582
White Total	153,357	5,419	577	4	9	159,366
Total purchased	291,212	13,001	1,926	18	14	306,170

Riverland

Current plantings by variety and year planted - reds

Variety	Area (hectares)				Total area (Ha)	% planted in 2022
	Pre-2020	2020	2021	2022		
Red winegrapes						
Barbera	2	0	0	0	2	0%
Cabernet Franc	2	0	0	0	2	0%
Cabernet Sauvignon	3,358	17	18	4	3,397	0%
Durif	35	13	1	0	49	0%
Grenache	281	0	1	1	283	0%
Malbec	25	0	0	0	25	0%
Mataro (Mourvedre)	209	0	0	0	209	0%
Merlot	1,212	3	3	6	1,224	0%
Montepulciano	8	0	0	0	8	0%
Muscat A Petit Grains Rouge	2	0	0	0	2	0%
Petit Verdot	486	0	0	0	486	0%
Pinot Noir	288	7	14	2	311	1%
Ruby Cabernet	117	1	0	5	123	4%
Sangiovese	21	0	0	0	21	0%
Saperavi	2	0	0	0	2	0%
Shiraz	5,615	57	37	25	5,734	0%
Tempranillo	52	0	0	0	52	0%
Touriga	14	0	0	0	14	0%
Other Red	100	3	7	4	114	4%
Total red varieties	11,829	101	81	47	12,058	0%

Source:
Vinehealth
Australia

Riverland

Current plantings by variety and year planted – whites and other

Variety	Area (hectares)				Total area (Ha)	% planted in 2022
	Pre-2020	2020	2021	2022		
White winegrapes						
Chardonnay	4,211	2	1	26	4,240	1%
Chenin Blanc	68	0	0	0	68	0%
Colombard	687	0	0	0	687	0%
Doradillo	30	0	0	0	30	0%
Fiano	13	0	0	0	13	0%
Muscadelle (Tokay)	5	0	0	0	5	0%
Muscat A Petit Grains Blanc (White Frontignac)	98	0	0	0	98	0%
Muscat Gordo Blanco	799	0	0	0	799	0%
Palomino	6	0	0	0	6	0%
Pedro Ximenez	4	0	0	0	4	0%
Pinot Gris	275	0	0	2	277	1%
Prosecco	0	0	1	6	7	86%
Riesling	82	0	0	0	82	0%
Sauvignon Blanc	545	4	18	13	580	2%
Savagnin	9	0	0	2	11	18%
Semillon	299	0	0	1	300	0%
Sultana	95	0	0	0	95	0%
Traminer (Gewurztraminer)	71	0	0	0	71	0%
Trebbiano	12	0	0	0	12	0%
Verdelho	81	0	0	0	81	0%
Vermentino	16	0	0	0	16	0%
Viognier	98	0	0	0	98	0%
Other White	34	0	0	4	38	11%
Total white varieties	7,538	6	20	54	7,618	1%
Unknown variety	536	56	0	0	592	0%
Rootstock Block	26	0	0	0	26	0%
Table grapes - red	16	0	0	1	17	6%
Table grapes - white	9	0	0	0	9	0%
Multi-purpose red	60	0	0	0	60	0%
Multi-purpose white	66	0	0	0	66	0%
Total all varieties	20,080	163	101	102	20,446	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 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 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>

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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, 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.

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