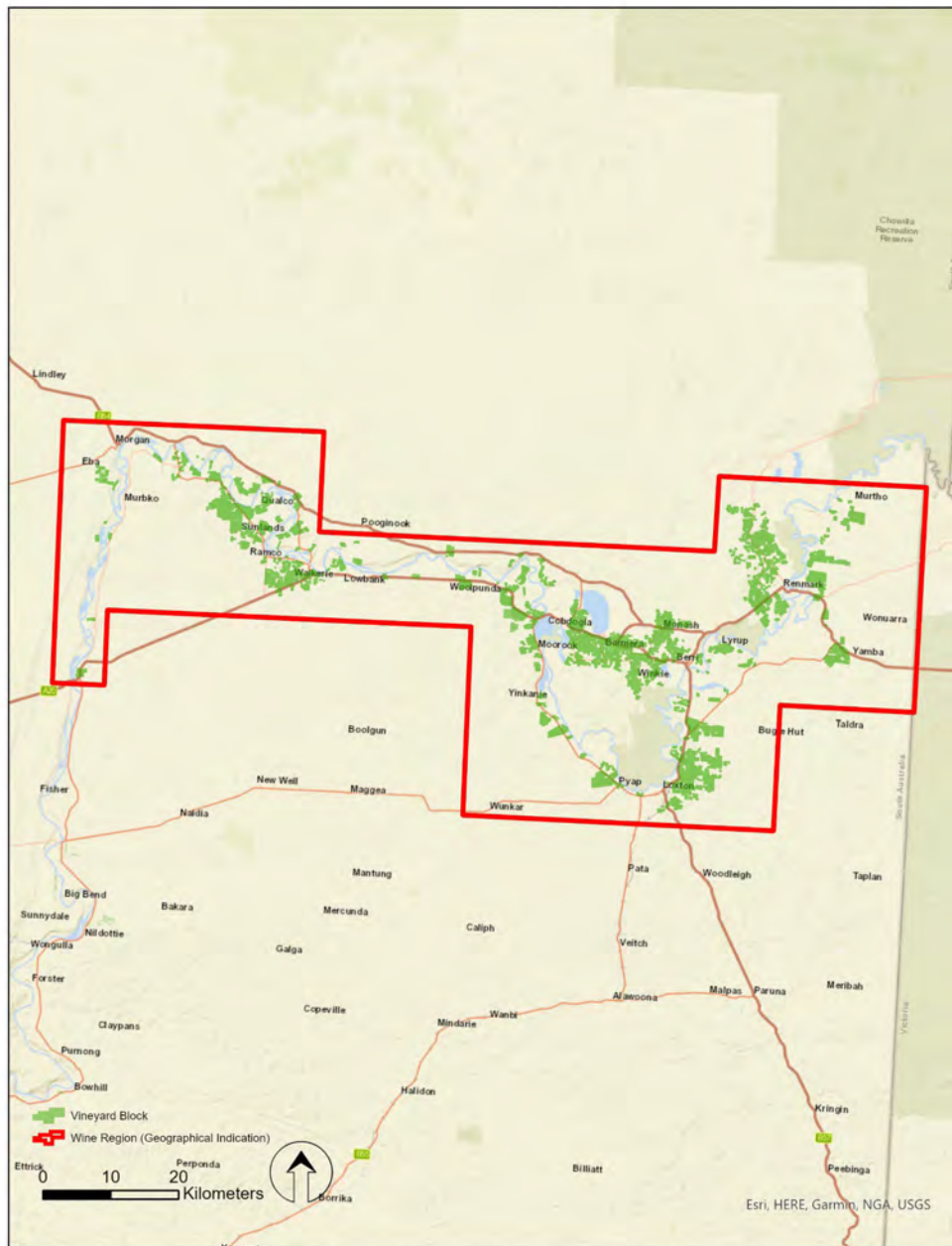


SA Winegrape Crush Survey 2024

Regional Summary Report

Riverland Wine Region

Wine Australia July 2024



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

Vintage 2024 generally commenced during the last week of January and finished the week before Easter.

A much higher than average growing season rainfall was accompanied by above-average temperatures in February and March. Temperatures hit the 40's during the second and third week of January and first, second and third week of February.

Yields were below average in many cases, due to the financial impact from the previous vintage on inputs.

High-temperature shrivelling and long hang times due to winery and logistics constraints made harvest difficult.

Growers had to balance the low prices being received for the major red wine grape varieties against the cost of harvesting and transport to a winery.

Charles Matheson
Grower Engagement Officer, Riverland Wine

OVERVIEW OF VINTAGE STATISTICS

After recording the lowest crush for 10 years with 410,888 tonnes in 2023, the Riverland saw a further 5 per cent decrease to 391,248 tonnes in 2024 – very similar to the 2013 crush of 396,199 tonnes. Over the past five years (up to 2023), the average crush for the Riverland has been 482,277 tonnes, making this year's crush 19 per cent below the average.

There were 47 respondents to the survey who reported crushing grapes from the Riverland in 2024, compared with 59 in 2023.

The total value of winegrapes in 2024 was \$119 million, down 11 per cent from \$134 million in 2023. The smaller crush size was compounded by a small decrease in average value, down from \$318 to \$312 per tonne.

All major varieties decreased in average value, with red varieties decreasing by more than whites. Shiraz was down 11 per cent to \$200 per tonne, Cabernet Sauvignon down 16 per cent to \$189 per tonne and Merlot down 11 per cent to \$183 per tonne. Chardonnay and Sauvignon Blanc were both down 1 per cent to \$366 and \$540 per tonne respectively, while Pinot Gris/Grigio declined 3 per cent to \$524 per tonne.

The price dispersion showed a significant downward shift, with 32 per cent of grapes purchased below \$200 per tonne, compared with 17 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in the Riverland as at 30 April 2024 was 20,326 hectares, a decrease of 120 hectares compared with the previous year and 40 hectares less than it was in 2019. The average vineyard size in Riverland is 13.1 hectares, compared with the state average of 16.1 hectares.

There were 89 hectares of new plantings (including top-working and replacements) in the 2023–24 season, of which 75 hectares were white varieties; Sauvignon Blanc was the largest with 33 hectares.

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 | 6 | | | | | | 6 | \$1,176 |
| Cabernet Franc | 4 | | | | | | 4 | \$735 |
| Cabernet Sauvignon | 31,318 | \$5,931,239 | \$189 | -16% | 13,170 | 30% | 44,489 | \$8,425,591 |
| Durif | 847 | \$307,179 | \$363 | -7% | 37 | 4% | 884 | \$320,614 |
| Graciano | 20 | | | | | | 20 | \$14,637 |
| Grenache | 3,600 | \$1,586,372 | \$441 | -9% | 283 | 7% | 3,883 | \$1,710,898 |
| Lagrein | 9 | | | | | | 9 | \$6,987 |
| Malbec | 46 | | | | 226 | 83% | 271 | \$84,349 |
| Mataro/Mourvedre | 2,115 | \$829,360 | \$392 | -6% | 118 | 5% | 2,233 | \$875,513 |
| Merlot | 10,913 | \$1,997,451 | \$183 | -11% | 9,224 | 46% | 20,137 | \$3,685,838 |
| Montepulciano | 246 | \$133,127 | \$543 | 2% | 65 | 21% | 311 | \$168,362 |
| Muscat à Petits Grains Rouges | 107 | | | | 1 | 1% | 108 | \$43,759 |
| Nebbiolo | 2 | | | | | | 2 | \$315 |
| Nero d'Avola | 1 | | | | | | 1 | \$380 |
| Petit Verdot | 4,975 | \$888,044 | \$179 | -16% | 5,703 | 53% | 10,678 | \$1,906,121 |
| Pinot Noir | 6,569 | \$4,232,623 | \$644 | -3% | 1,036 | 14% | 7,605 | \$4,900,090 |
| Ruby Cabernet | 897 | \$263,570 | \$294 | 9% | 909 | 50% | 1,807 | \$530,703 |
| Sangiovese | 121 | | | | 353 | 74% | 474 | \$112,830 |
| Shiraz | 59,521 | \$11,912,066 | \$200 | -11% | 24,808 | 29% | 84,329 | \$16,876,829 |
| Tempranillo | 549 | \$187,651 | \$342 | -15% | 121 | 18% | 670 | \$229,109 |
| Touriga Nacional | 26 | | | | 153 | 85% | 179 | \$41,223 |
| Other red | 2,942 | \$1,175,747 | \$400 | -1% | 15,680 | 84% | 18,622 | \$6,768,939 |
| Red Total | 124,833 | \$29,561,260 | \$237 | -7% | 71,886 | 37% | 196,719 | \$46,704,996 |

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

Riverland

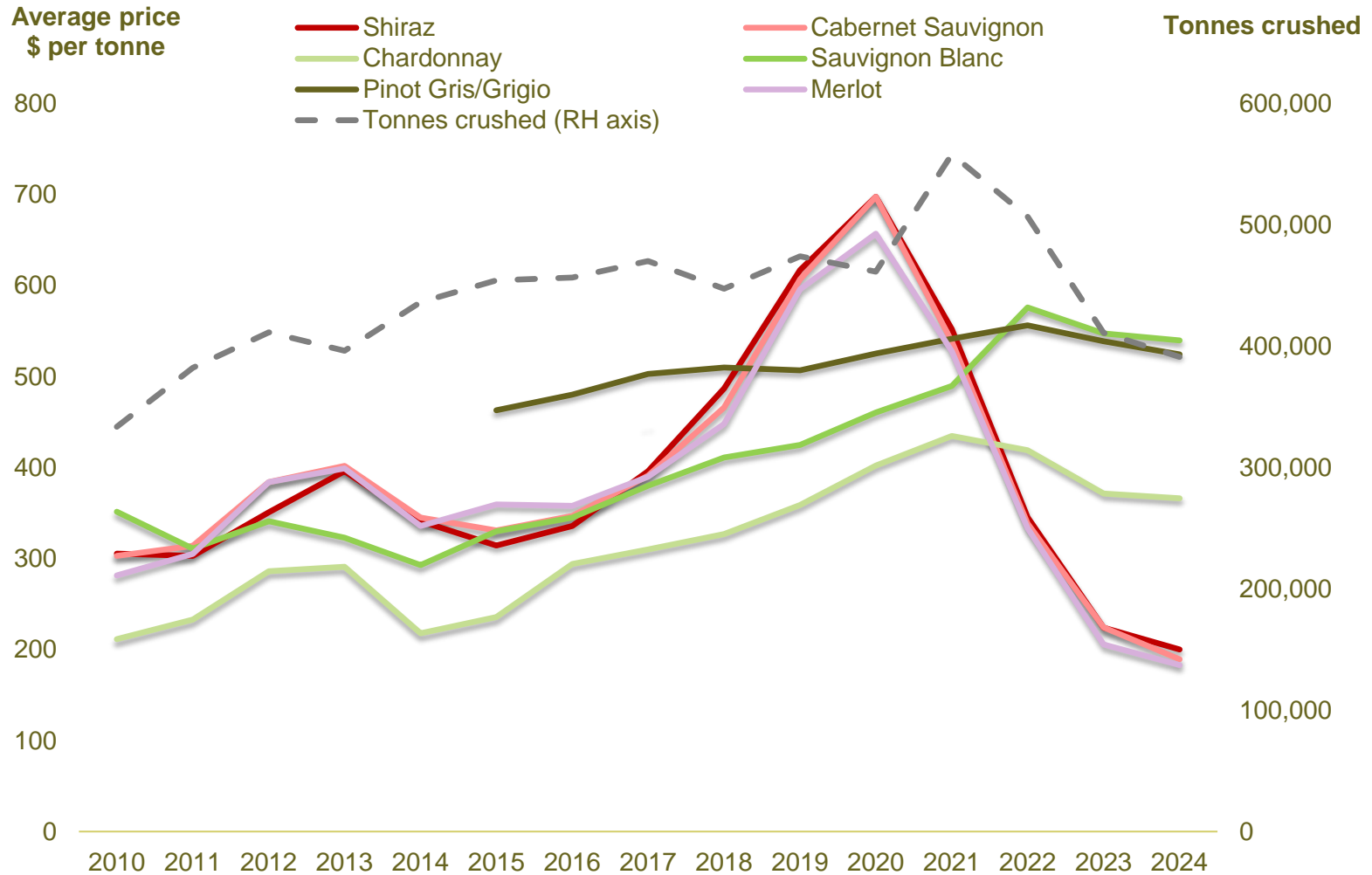
Winegrape intake summary table – whites

| 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 | 91,582 | \$33,552,555 | \$366 | -1% | 15,156 | 14% | 106,738 | \$39,105,332 |
| Chenin blanc | 1,023 | \$337,769 | \$330 | 2% | | | 1,023 | \$337,769 |
| Colombard | 19,703 | \$5,521,430 | \$280 | -0% | 2,766 | 12% | 22,469 | \$6,296,653 |
| Fiano | 134 | | | | 37 | 22% | 171 | \$79,973 |
| Gewürztraminer | 796 | \$304,865 | \$383 | 0% | 1,324 | 62% | 2,120 | \$812,268 |
| Grüner Veltliner | | | | | 97 | 100% | 97 | \$97,160 |
| Muscat à Petits Grains Blancs | 873 | \$281,965 | \$323 | 2% | 466 | 35% | 1,339 | \$432,451 |
| Muscat Gordo Blanco | 17,362 | \$5,209,305 | \$300 | -0% | 2,066 | 11% | 19,427 | \$5,829,079 |
| Pinot Gris/Grigio | 6,314 | \$3,316,469 | \$524 | -3% | 1,929 | 23% | 8,243 | \$4,327,917 |
| Prosecco | 420 | \$237,518 | \$566 | -22% | | | 420 | \$237,518 |
| Riesling | 1,316 | \$416,902 | \$317 | -10% | 385 | 23% | 1,701 | \$538,930 |
| Roussanne | 3 | | | | | | 3 | \$750 |
| Sauvignon Blanc | 15,216 | \$8,211,296 | \$540 | -1% | 3,356 | 18% | 18,572 | \$10,022,148 |
| Semillon | 3,157 | \$1,070,894 | \$339 | 0% | 3,177 | 50% | 6,334 | \$2,148,761 |
| Verdelho | 809 | \$240,219 | \$297 | 2% | 882 | 52% | 1,691 | \$501,957 |
| Vermentino | 217 | \$116,629 | \$538 | 1% | 83 | 28% | 300 | \$161,421 |
| Viognier | 1,088 | \$531,193 | \$488 | 5% | 385 | 26% | 1,473 | \$719,010 |
| Other white | 2,231 | \$741,904 | \$332 | -18% | 177 | 7% | 2,408 | \$875,943 |
| White Total | 162,242 | \$60,154,146 | \$371 | -2% | 32,287 | 17% | 194,529 | \$72,525,039 |
| Grand Total | 287,075 | \$89,715,406 | \$312 | -2% | 104,173 | 27% | 391,248 | \$119,230,035 |

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 | 6 | | | | | 6 |
| Cabernet Franc | 4 | | | | | 4 |
| Cabernet Sauvignon | 31,171 | 147 | | | | 31,318 |
| Durif | 720 | 128 | | | | 847 |
| Graciano | 3 | 18 | | | | 20 |
| Grenache | 3,402 | 179 | 18 | | | 3,600 |
| Lagrein | 5 | | 4 | | | 9 |
| Malbec | 46 | | | | | 46 |
| Mataro/Mourvedre | 1,774 | 342 | | | | 2,115 |
| Merlot | 10,913 | | | | | 10,913 |
| Montepulciano | 173 | 53 | 20 | | | 246 |
| Muscat à Petits Grains Rouges | 107 | | | | | 107 |
| Nebbiolo | 2 | | | | | 2 |
| Nero d'Avola | | 1 | | | | 1 |
| Petit Verdot | 4,938 | 36 | | | | 4,975 |
| Pinot Noir | 218 | 6,044 | 307 | | | 6,569 |
| Ruby Cabernet | 897 | | | | | 897 |
| Sangiovese | 121 | | | | | 121 |
| Shiraz | 58,229 | 1,170 | 122 | | | 59,521 |
| Tempranillo | 515 | 12 | 22 | | | 549 |
| Touriga Nacional | 26 | | | | | 26 |
| Other red | 2,628 | 310 | 2 | | 3 | 2,942 |
| Red Total | 115,895 | 8,440 | 495 | | 3 | 124,833 |

Riverland

Price dispersion – purchased grapes (white)

| Varieties | Tonnes purchased in each segment | | | | | Total purchased |
|-------------------------------|----------------------------------|---------------|---------------|----------------|----------|-----------------|
| | <\$600 | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000 | |
| White | | | | | | |
| Chardonnay | 91,106 | 414 | 62 | | | 91,582 |
| Chenin blanc | 1,023 | | | | | 1,023 |
| Colombard | 19,703 | | | | | 19,703 |
| Fiano | 130 | | | | 4 | 134 |
| Gewürztraminer | 796 | | | | | 796 |
| Muscat à Petits Grains Blancs | 858 | 16 | | | | 873 |
| Muscat Gordo Blanco | 17,362 | | | | | 17,362 |
| Pinot Gris/Grigio | 5,949 | 366 | | | | 6,314 |
| Prosecco | 373 | 47 | | | | 420 |
| Riesling | 1,316 | | | | | 1,316 |
| Roussanne | 3 | | | | | 3 |
| Sauvignon Blanc | 12,472 | 2,745 | | | | 15,216 |
| Semillon | 3,157 | | | | | 3,157 |
| Verdelho | 809 | | | | | 809 |
| Vermentino | 151 | 66 | | | | 217 |
| Viognier | 928 | | 160 | | | 1,088 |
| Other white | 2,195 | | 31 | 5 | | 2,231 |
| White Total | 158,328 | 3,652 | 254 | 5 | 4 | 162,242 |
| Total purchased | 274,223 | 12,092 | 749 | 5 | 7 | 287,075 |

Riverland

Current plantings by variety and year planted - reds

| Variety | Area (hectares) | | | | Total area (Ha) | % planted in 2023 |
|-----------------------------|-----------------|------------|-----------|-----------|--------------------|----------------------|
| | Pre-2021 | 2021 | 2022 | 2023 | | |
| Red winegrapes | | | | | | |
| Barbera | 2 | 0 | 0 | 0 | 2 | 0% |
| Cabernet Franc | 1 | 0 | 0 | 0 | 1 | 0% |
| Cabernet Sauvignon | 3,249 | 18 | 16 | 4 | 3,287 | 0% |
| Durif (Petite Sirah) | 48 | 1 | 0 | 4 | 53 | 8% |
| Grenache | 276 | 1 | 8 | 0 | 285 | 0% |
| Malbec | 24 | 0 | 0 | 0 | 24 | 0% |
| Mataro (Mourvedre) | 207 | 0 | 0 | 0 | 207 | 0% |
| Merlot | 1,205 | 3 | 0 | 1 | 1,209 | 0% |
| Montepulciano | 9 | 0 | 0 | 0 | 9 | 0% |
| Muscat A Petit Grains Rouge | 3 | 0 | 0 | 0 | 3 | 0% |
| Petit Verdot | 461 | 0 | 0 | 0 | 461 | 0% |
| Pinot Noir | 300 | 50 | 14 | 5 | 369 | 1% |
| Rubired | 43 | 0 | 5 | 0 | 49 | 0% |
| Ruby Cabernet | 113 | 0 | 0 | 0 | 113 | 0% |
| Sangiovese | 22 | 0 | 0 | 0 | 22 | 0% |
| Saperavi | 2 | 0 | 0 | 0 | 2 | 0% |
| Shiraz | 5,535 | 48 | 26 | 0 | 5,610 | 0% |
| Tempranillo | 48 | 0 | 5 | 0 | 54 | 0% |
| Touriga | 14 | 0 | 0 | 0 | 14 | 0% |
| Other Red | 65 | 6 | 3 | 0 | 75 | 0% |
| Red winegrapes Total | 11,628 | 128 | 77 | 15 | 11,848 | 0% |

Source:
Vinehealth
Australia

Riverland

Current plantings by variety and year planted – whites and other

| Variety | Area (hectares) | | | | Total area (Ha) | % planted in 2023 |
|--|-----------------|------------|------------|-----------|-----------------|-------------------|
| | Pre-2021 | 2021 | 2022 | 2023 | | |
| White winegrapes | | | | | | |
| Chardonnay | 4,134 | 1 | 26 | 4 | 4,165 | 0% |
| Chenin Blanc | 68 | 0 | 0 | 0 | 68 | 0% |
| Colombard | 675 | 0 | 0 | 0 | 676 | 0% |
| Doradillo | 30 | 0 | 0 | 0 | 30 | 0% |
| Fiano | 14 | 0 | 0 | 4 | 17 | 24% |
| Muscadelle (Tokay) | 4 | 0 | 0 | 0 | 4 | 0% |
| Muscat A Petit Grains Blanc (White Frontignac) | 98 | 0 | 0 | 0 | 98 | 0% |
| Muscat Gordo Blanco | 786 | 0 | 0 | 0 | 786 | 0% |
| Palomino | 5 | 0 | 0 | 0 | 5 | 0% |
| Pedro Ximenez | 4 | 0 | 0 | 0 | 4 | 0% |
| Pinot Gris | 289 | 0 | 5 | 11 | 305 | 4% |
| Prosecco | 0 | 1 | 6 | 9 | 16 | 56% |
| Riesling | 80 | 0 | 0 | 1 | 81 | 1% |
| Sauvignon Blanc | 564 | 18 | 34 | 33 | 649 | 5% |
| Savagnin | 8 | 0 | 3 | 0 | 11 | 0% |
| Semillon | 292 | 0 | 2 | 1 | 294 | 0% |
| Sultana | 84 | 0 | 0 | 0 | 84 | 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 | 90 | 0 | 0 | 12 | 102 | 12% |
| Other White | 31 | 0 | 4 | 0 | 35 | 0% |
| White winegrapes Total | 7,437 | 20 | 79 | 75 | 7,611 | 1% |
| Unknown variety | 695 | 0 | 0 | 0 | 695 | 0% |
| Rootstock | 26 | 0 | 0 | 0 | 26 | 0% |
| Multi-purpose red | 59 | 0 | 0 | 0 | 59 | 0% |
| Multi-purpose white | 64 | 0 | 0 | 0 | 64 | 0% |
| Table red | 14 | 0 | 1 | 0 | 15 | 0% |
| Table white | 9 | 0 | 0 | 0 | 9 | 0% |
| Total area | 19,932 | 148 | 157 | 89 | 20,326 | 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 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>

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

