The SA Winegrape Crush Survey 2023

Prepared on behalf of

South Australian Wine Industry Association Inc

Wine Grape Council South Australia

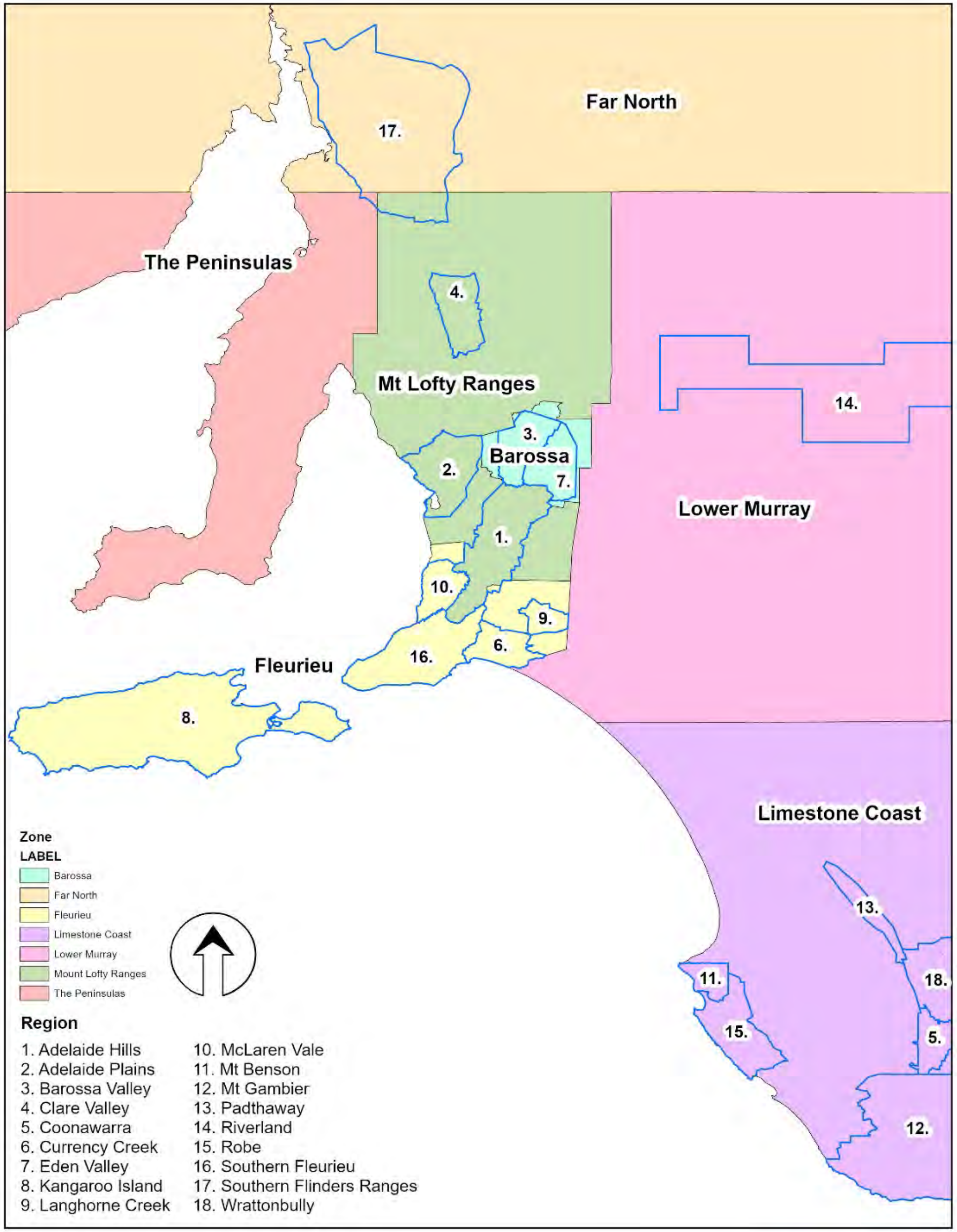
Wine Australia July 2023

Contents

SA Winegrape Crush Survey 2023

South Australia State Summary Report

Wine Australia July 2023



SCALE: 1:2,500,000
DATUM: GDA2020
PROJECTION: Transverse Mercator
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Wine Regions - Wine Australia

Geographical Indication Zones and Regions in South Australia

VINEHEALTH AUSTRALIA

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State summary 2023

Overview of vintage statistics

State and regional overview

The total reported crush of South Australian winegrapes in 2023 was 661,984 tonnes. This was 18 per cent below the 2022 crush of 806,059 tonnes, and 14 per cent below the 10-year average (2013-2022) of 772,799 tonnes.

Most regions declined compared with 2022, with the biggest decreases in the Limestone Coast regions: Wrattonbully (down 38 per cent), Coonawarra (down 44 per cent) and Robe (down 31 per cent). Langhorne Creek (down 24 per cent) and McLaren Vale (down 24 per cent) decreased in line with the overall national figure, while the Adelaide Hills and Clare (both down 12 per cent) had smaller reductions. Padthaway (down 7 per cent) crushed slightly more than any of these and moved into third place by crush size after the Riverland and Barossa Valley.

The Riverland crushed 410,888 tonnes, the smallest from the region since 2011, 19 per cent below 2022 and 12 per cent below the 10-year average of 466,128 tonnes. It accounted for 62 per cent of the state's total crush, and 34 per cent of the national crush.

In contrast to all these, the Barossa Valley (including Barossa zone other) was up 33 per cent compared with last year and 32 per cent compared with the 10-year average.

The total estimated value of the crush was $515 million, $107 million (21 per cent) less than in 2022, reflecting the decreased volume combined with a slight decrease in the overall average value, which reduced by 2 per cent from $711 per tonne in 2022 to $700 per tonne.

The weighted average prices for the top variety in each major region experienced quite mixed fortunes. McLaren Vale Grenache increased 6 per cent to a record $2432 per tonne, Adelaide Hills Sauvignon Blanc increased by 26 per cent to a record $1988 per tonne, while Barossa Valley Shiraz declined for the second year in a row to be below $2000 per tonne for the first time since 2014. Most other major variety combinations were generally flat.

Varietal overview

The red crush was 408,715 tonnes in 2023, with the two top varieties, Shiraz and Cabernet Sauvignon, making up 75 per cent of the total. The red crush decreased by 21 per cent compared with 2022 and was 17 per cent below the five-year average of 493,879 tonnes. All the top 10 red varieties decreased except for Mataro/Mouvèdre (up 3 per cent). Shiraz was down by 10 per cent and Cabernet Sauvignon by 39 per cent.

The white crush was down by 13 per cent to 253,270 tonnes. It increased its share of the total crush from 36 per cent in 2022 to 38 per cent in 2023. All major white varieties decreased in crush except Muscat Gordo Blanco (up 9 per cent), Riesling (up 9 per cent), Viognier (up 1 per cent) and Semillon (no change). Chardonnay was down by 22 per cent, Gewürztraminer by 16 per cent, Pinot Gris/Grigio by 7 per cent and Sauvignon Blanc by 1 per cent.

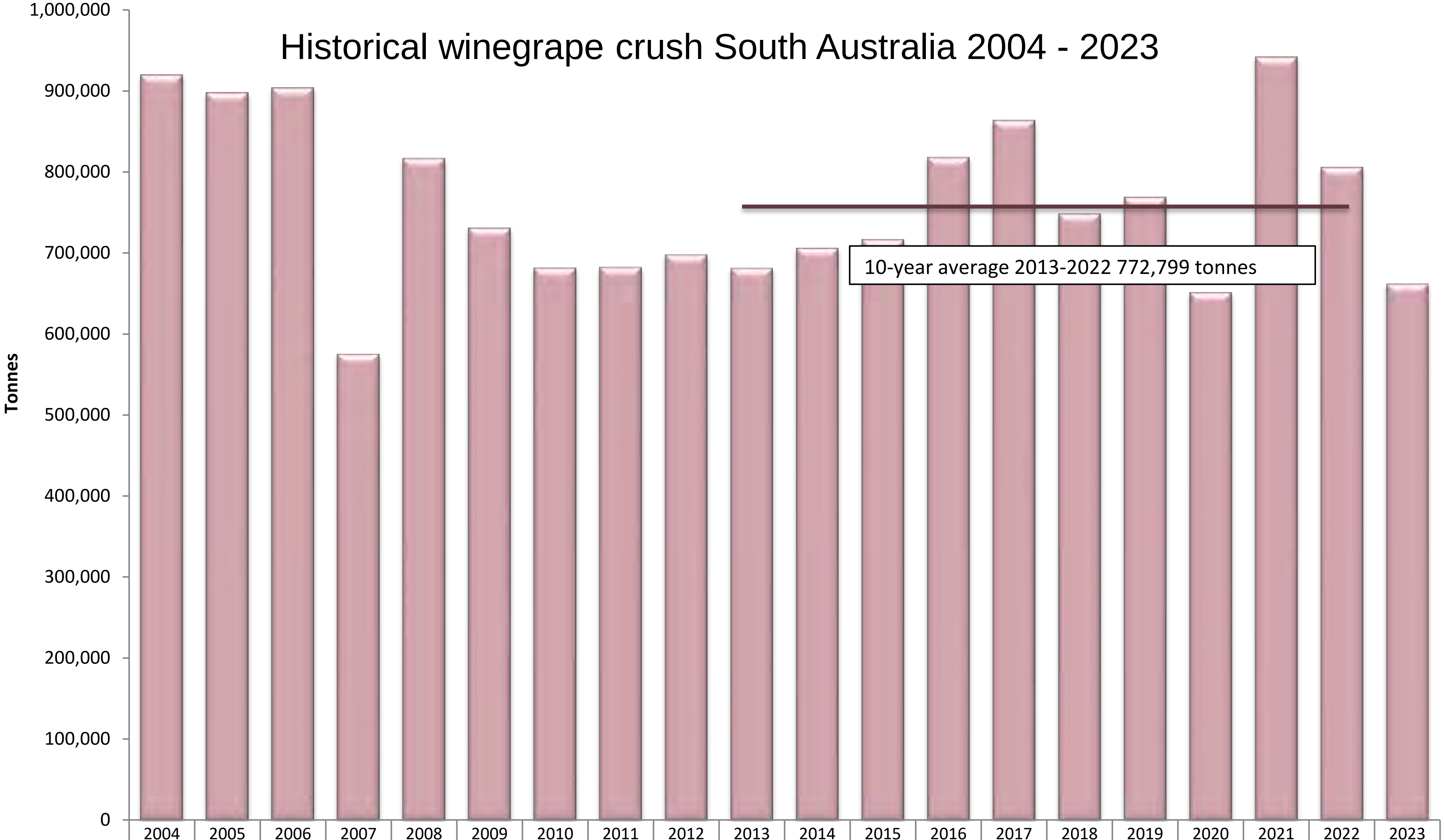
Vineyard plantings

Planting data derived from the Vinehealth Australia vineyard register shows that there were 75,485 hectares planted to vines in South Australia as at 30 April 2023. This represents a net decrease of 668 hectares in the last 12 months.

Despite the net decrease, there were plantings over the last year, with a total of 323 hectares planted to winegrapes in the 2022–23 planting season (including topworking and replacements) compared with 403 hectares in the previous season. Sixty-one percent of new plantings were red varieties, with Shiraz making up nearly a quarter of all new plantings (73 hectares). Other significant plantings were Fiano (34 hectares), Cabernet Sauvignon (32 hectares), Chardonnay (27 hectares) and Sauvignon Blanc (18 hectares). The largest area of new plantings in the state was in the Riverland (102 hectares) followed by the Clare Valley (60 hectares).

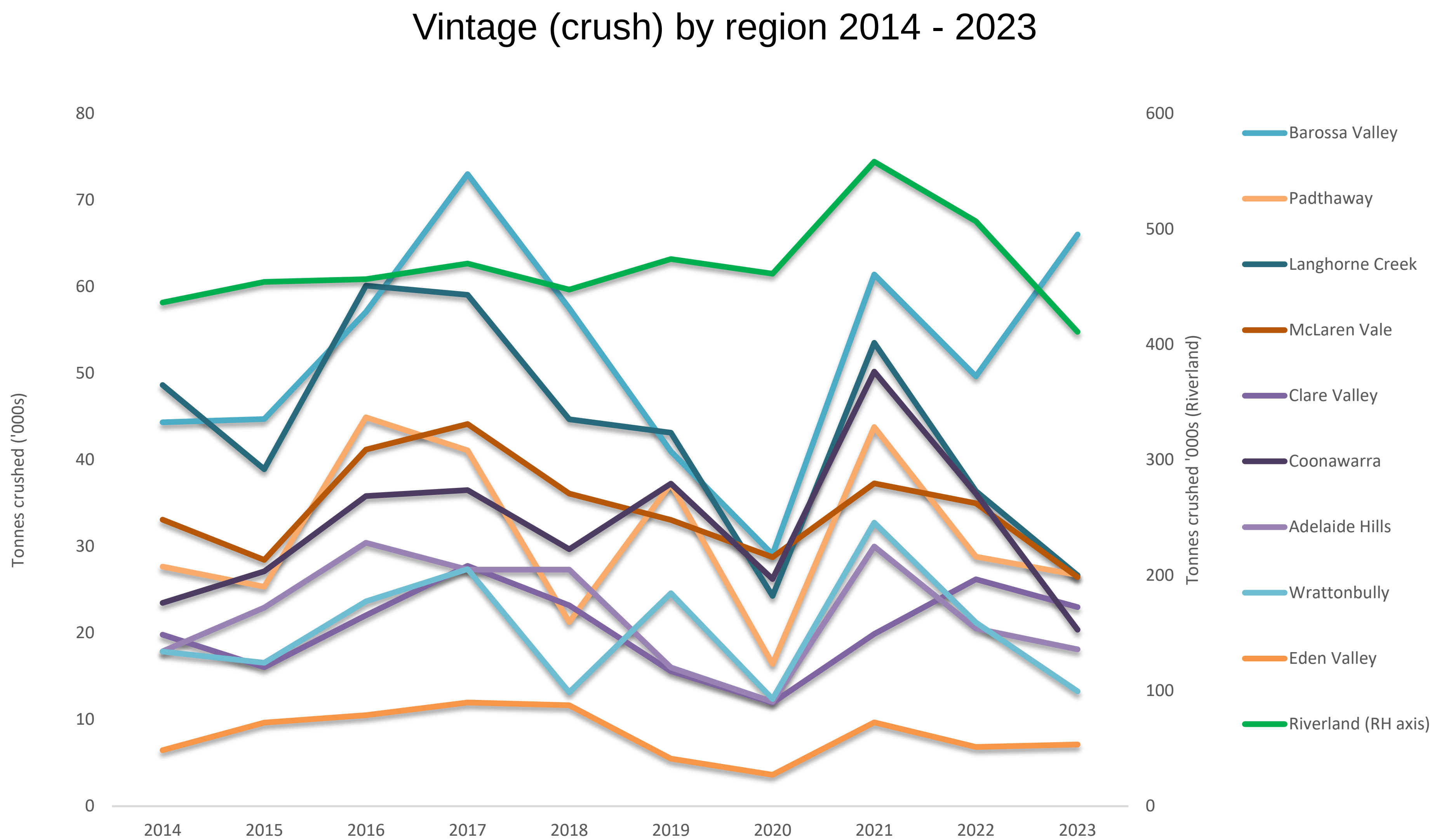
There were 3,234 vineyard owners registered with Vinehealth Australia as at 30 April 2023, compared with 3,252 in 2022.

State summary 2023



	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Actual tonnage	920,194	898,165	904,022	575,111	816,868	730,904	681,578	682,671	698,005	681,319	706,017	716,592	817,981	863,789	748,484	768,936	651,195	942,254	806,059	661,984

State summary 2023



State summary 2023

Total crush by GI region 2023 vs 2022

GI Region	Purchased (tonnes)	Winery grown (tonnes)	2023	Region share of state	2022	% change
Adelaide Hills	13,500	4,626	18,125	2.7%	20,535	-12%
Adelaide Plains	1,495	25	1,520	0.2%	1,902	-20%
Barossa Valley	37,927	27,025	64,952	9.8%	48,572	34%
Barossa zone other	26	1,054	1,079	0.2%	1,067	1%
Clare Valley	11,040	11,947	22,987	3.5%	26,194	-12%
Coonawarra	4,034	16,339	20,373	3.1%	36,122	-44%
Currency Creek	3,260	620	3,880	0.6%	4,294	-10%
Eden Valley	3,776	3,353	7,129	1.1%	6,842	4%
Fleurieu zone other	696	-	696	0.1%	1,680	-59%
Kangaroo Island	-	124	124	0.0%	163	-24%
Langhorne Creek	18,286	8,367	26,653	4.0%	36,394	-27%
Limestone Coast zone other	3,390	1,579	4,969	0.8%	15,407	-68%
Lower Murray zone other	4,052	-	4,052	0.6%	3,562	14%
McLaren Vale	15,726	10,741	26,467	4.0%	34,990	-24%
Mount Benson	981	1,734	2,715	0.4%	3,815	-29%
Mount Gambier	928	2	930	0.1%	946	-2%
Mount Lofty Ranges zone other	562	51	612	0.1%	676	-9%
Padthaway	20,901	5,805	26,706	4.0%	28,805	-7%
Riverland	306,170	104,718	410,888	62.1%	506,769	-19%
Robe	129	2,655	2,783	0.4%	4,014	-31%
Southern Fleurieu	374	-	374	0.1%	826	-55%
Southern Flinders Ranges	539	6	545	0.1%	1,083	-50%
The Peninsulas	127	44	171	0.0%	191	-10%
Wrattonbully	8,530	4,722	13,252	2.0%	21,211	-38%
Grand Total	**456,447**	**205,538**	**661,984**	**100.0%**	**806,059**	**-18%**

State summary 2023

Vintage summary by GI region 2023

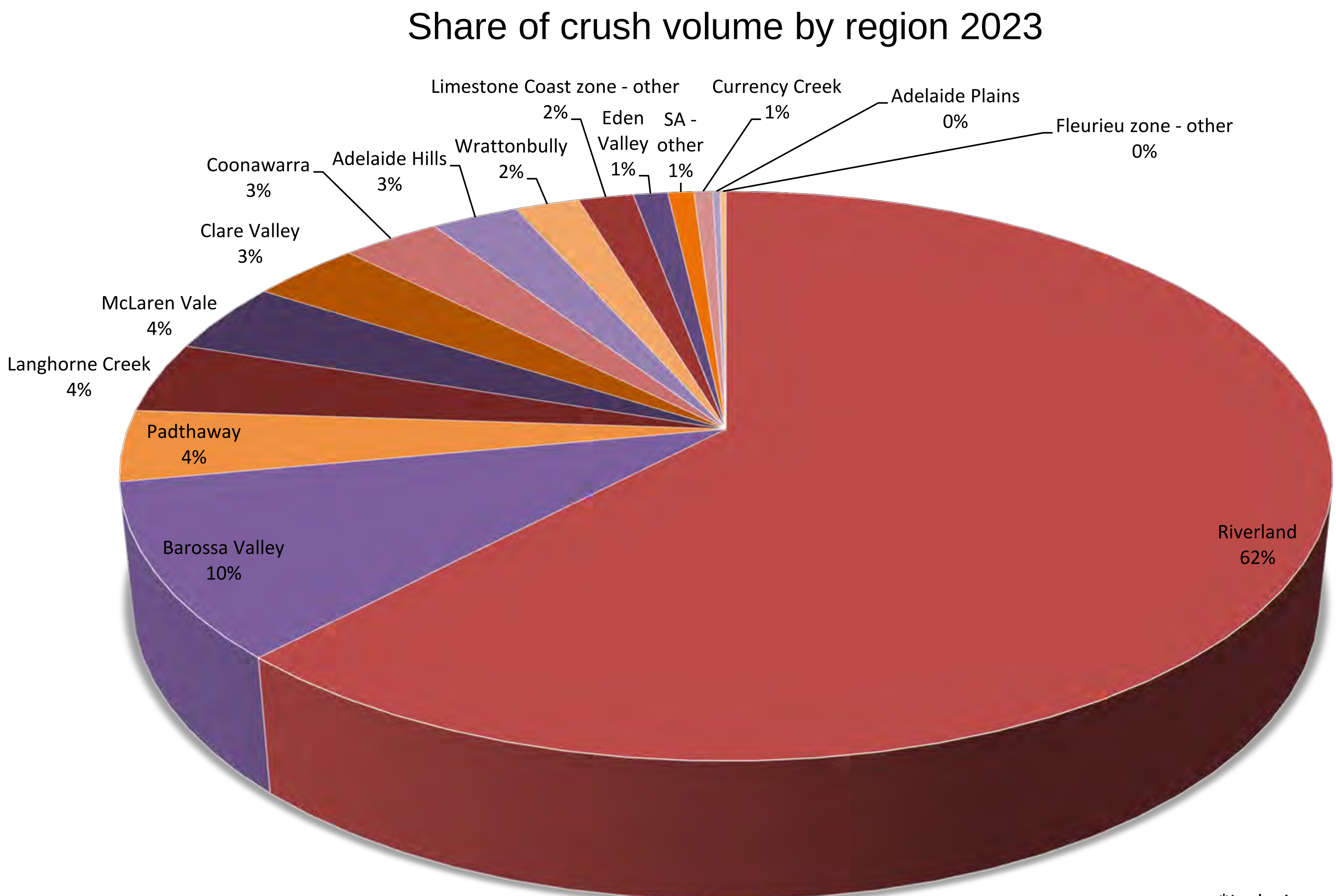
Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2023	Est value of purchased grapes	Est value of all grapes
Adelaide Hills	Red	1,300	4,737	6,037	$ 10,922,327	$ 13,867,075
	White	3,326	8,763	12,088	$ 18,636,610	$ 25,569,780
	Total	4,626	13,500	18,125	$ 29,558,936	$ 39,436,854
Adelaide Plains	Red	16	1,139	1,154	$ 1,018,008	$ 1,033,387
	White	9	357	365	$ 467,489	$ 479,051
	Total	25	1,495	1,520	$ 1,485,497	$ 1,512,438
Barossa Valley	Red	27,095	34,836	61,931	$ 69,177,288	$ 123,000,638
inc Barossa zone other	White	984	3,116	4,100	$ 2,840,332	$ 3,811,981
	Total	28,079	37,952	66,031	$ 72,017,620	$ 126,812,619
Clare Valley	Red	7,609	6,557	14,166	$ 11,842,316	$ 25,525,794
	White	4,338	4,483	8,821	$ 6,795,160	$ 13,391,780
	Total	11,947	11,040	22,987	$ 18,637,476	$ 38,917,574
Coonawarra	Red	14,051	3,239	17,291	$ 4,337,141	$ 23,019,461
	White	2,288	795	3,083	$ 861,930	$ 3,325,317
	Total	16,339	4,034	20,373	$ 5,199,071	$ 26,344,778
Currency Creek	Red	320	2,661	2,981	$ 2,953,629	$ 3,315,245
	White	300	599	899	$ 622,483	$ 863,015
	Total	620	3,260	3,880	$ 3,576,112	$ 4,178,260
Eden Valley	Red	1,661	1,929	3,590	$ 4,848,035	$ 8,781,627
	White	1,692	1,848	3,539	$ 3,310,257	$ 6,418,589
	Total	3,353	3,776	7,129	$ 8,158,292	$ 15,200,216
Fleurieu zone other	Red	85	395	480	$ 444,872	$ 573,869
inc Southern Fleurieu	White	40	675	715	$ 605,102	$ 662,623
and Kangaroo Island	Total	124	1,070	1,194	$ 1,049,974	$ 1,236,491

State summary 2023

Vintage summary by GI region 2023 (continued)

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2023	Est value of purchased grapes	Est value of all grapes
Langhorne Creek	Red	5,623	15,565	21,188	$ 13,423,844	$ 18,481,137
	White	2,744	2,721	5,465	$ 2,164,645	$ 4,468,631
	Total	8,367	18,286	26,653	$ 15,588,489	$ 22,949,768
Limestone Coast zone other	Red	3,610	3,620	7,229	$ 3,868,993	$ 8,335,747
inc Robe, Mt Benson and	White	2,361	1,808	4,168	$ 2,249,966	$ 5,029,909
Mt Gambier	Total	5,970	5,428	11,398	$ 6,118,960	$ 13,365,656
McLaren Vale	Red	10,128	14,634	24,762	$ 25,234,116	$ 43,122,583
	White	613	1,092	1,705	$ 1,390,448	$ 2,326,901
	Total	10,741	15,726	26,467	$ 26,624,564	$ 45,449,484
Padthaway	Red	4,447	12,566	17,013	$ 14,163,948	$ 18,916,808
	White	1,359	8,334	9,693	$ 7,330,618	$ 8,481,852
	Total	5,805	20,901	26,706	$ 21,494,566	$ 27,398,659
Riverland	Red	70,047	146,804	216,851	$ 37,301,666	$ 60,699,221
	White	34,672	159,366	194,038	$ 60,035,143	$ 73,535,860
	Total	104,718	306,170	410,888	$ 97,336,809	$ 134,235,080
Wrattonbully	Red	3,745	6,533	10,278	$ 7,941,420	$ 12,507,720
	White	976	1,998	2,974	$ 2,053,886	$ 3,062,364
	Total	4,722	8,530	13,252	$ 9,995,307	$ 15,570,084
SA - other	Red	75	3,690	3,765	$ 1,862,767	$ 1,971,232
inc The Peninsulas and	White	27	1,589	1,615	$ 711,224	$ 749,142
Southern Flinders Ranges	Total	101	5,279	5,380	$ 2,573,991	$ 2,720,374
All winegrapes	**Total**	**205,538**	**456,447**	**661,984**	**319,415,664**	**515,328,335**

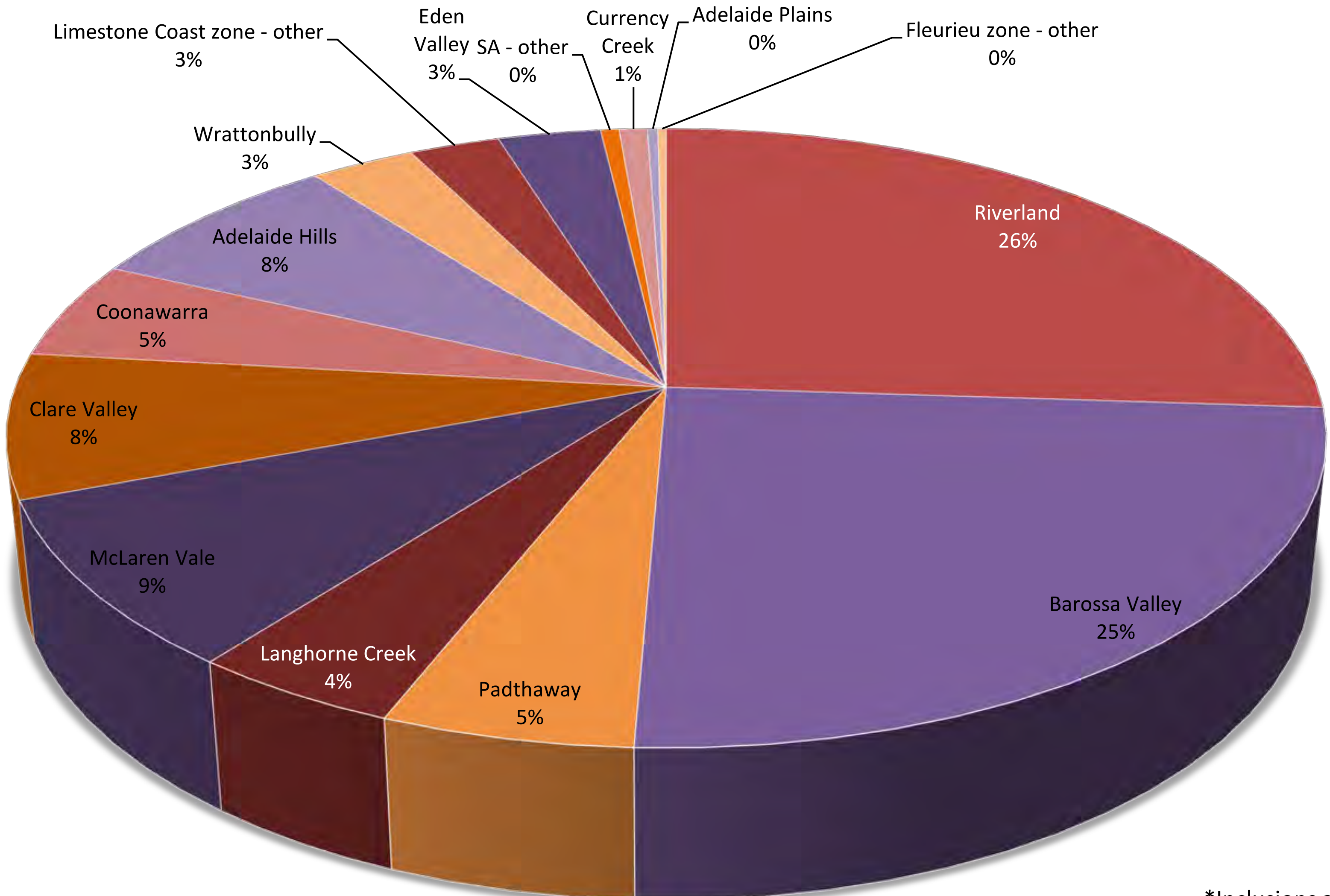
State summary 2023



*Inclusions as on page 8-9

State summary 2023

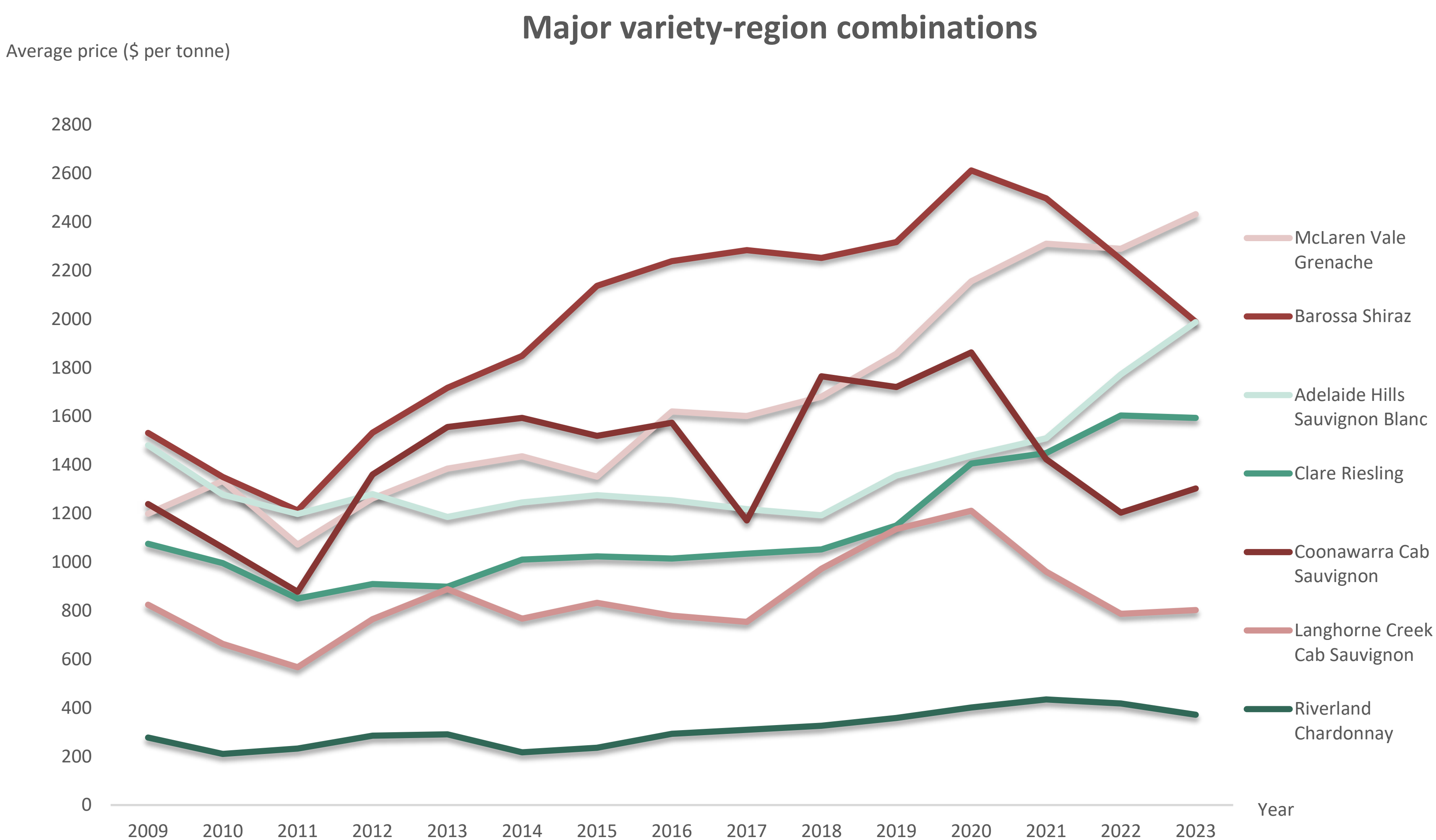
Share of crush value by region 2023



*Inclusions as on page 8-9

State summary 2023

Historical weighted average prices 2009 – 2023

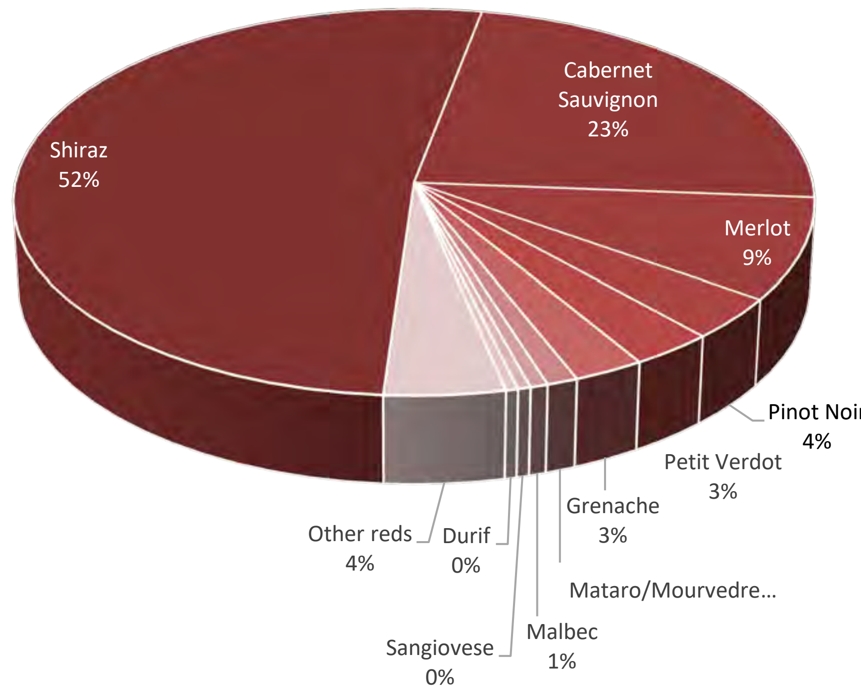


State summary 2023

Vintage summary by variety 2023 – red winegrapes

Variety	Purchased (tonnes)	Winery grown (tonnes)	Total crush 2023	Purchased as share of total
Red				
Barbera	45	20	65	69%
Cabernet Franc	196	201	398	49%
Cabernet Sauvignon	61,370	33,543	94,913	65%
Durif	1,625	207	1,831	89%
Graciano	88	34	122	72%
Grenache	7,182	3,462	10,643	67%
Lagrein	33	3	36	92%
Malbec	1,781	867	2,648	67%
Mataro/Mourvedre	3,637	1,025	4,662	78%
Merlot	21,254	13,676	34,931	61%
Montepulciano	242	154	395	61%
Muscat à Petits Grains Rouges	255	35	290	88%
Nebbiolo	25	28	53	47%
Nero d'Avola	95	64	159	60%
Other red	3,057	9,724	12,781	24%
Petit Verdot	6,085	6,347	12,432	49%
Pinot Meunier	153	13	166	92%
Pinot Noir	11,668	2,825	14,493	81%
Ruby Cabernet	727	922	1,650	44%
Sangiovese	828	1,093	1,921	43%
Shiraz	137,246	74,803	212,049	65%
Tempranillo	1,223	521	1,744	70%
Touriga Nacional	89	242	331	27%
Red Total	**258,904**	**149,810**	**408,715**	**63%**

Share of red crush by variety

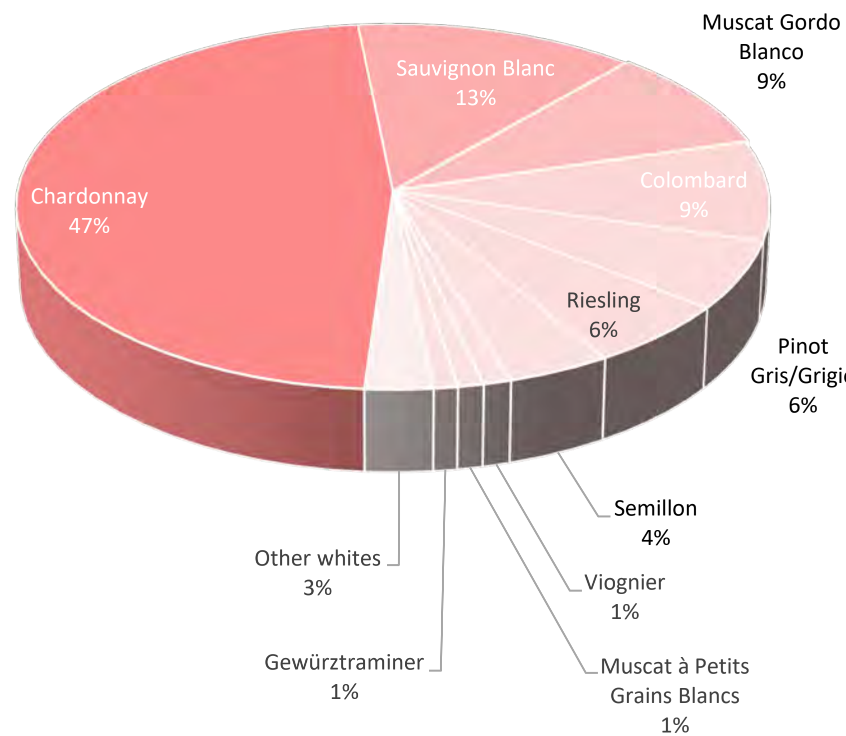


State summary 2023

Vintage summary by variety 2023 – white winegrapes

Variety	Purchased (tonnes)	Winery grown (tonnes)	Total crush 2023	Purchased as share of total
White				
Chardonnay	98,361	21,375	119,736	82%
Chenin blanc	1,269	12	1,280	99%
Colombard	20,293	2,173	22,466	90%
Fiano	267	212	479	56%
Gewürztraminer	956	1,459	2,415	40%
Grüner Veltliner	60	179	239	25%
Marsanne	46	75	121	38%
Muscat à Petits Grains Blancs	2,233	361	2,594	86%
Muscat Gordo Blanco	19,663	3,368	23,032	85%
Other white	666	565	1,232	54%
Pinot Gris/Grigio	11,433	3,856	15,289	75%
Prosecco	410	30	440	93%
Riesling	7,847	6,801	14,648	54%
Roussanne	54	33	87	62%
Sauvignon Blanc	24,829	8,222	33,051	75%
Semillon	5,605	4,804	10,409	54%
Verdelho	925	1,097	2,023	46%
Vermentino	558	374	933	60%
Viognier	2,067	732	2,799	74%
White Total	**197,542**	**55,727**	**253,270**	**78%**
Grand Total	**456,447**	**205,538**	**661,984**	**69%**

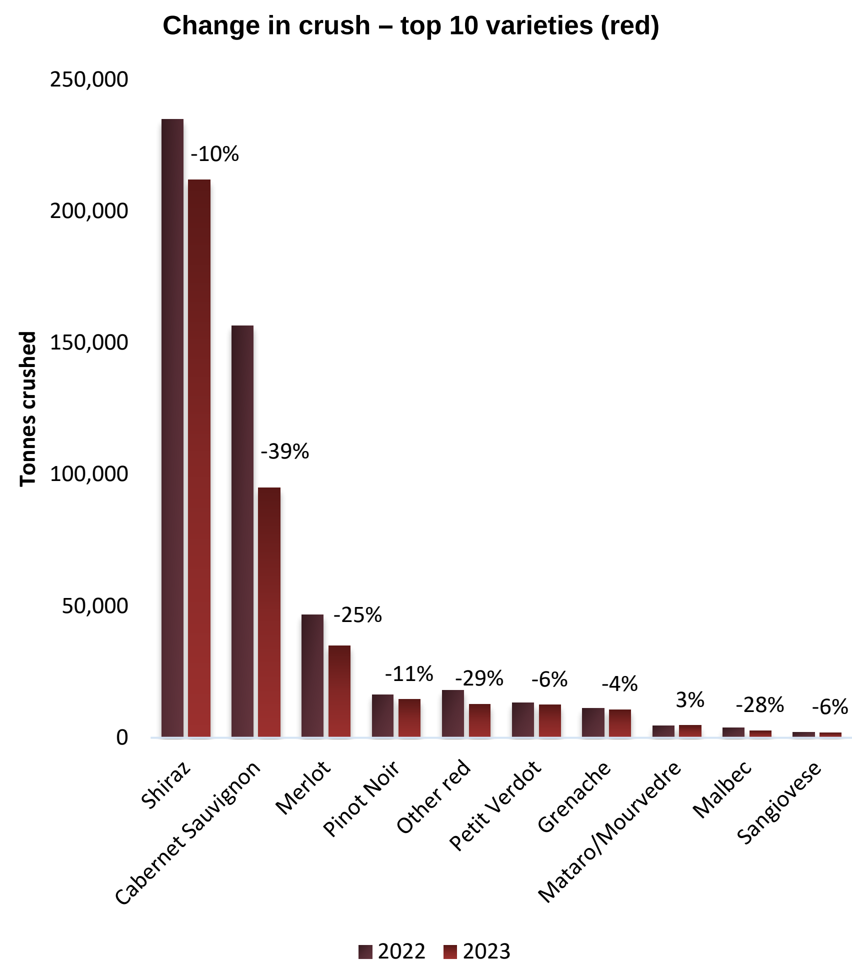
Share of white crush by variety



State summary 2023

Year-on-year comparison by variety 2023 vs 2022 – red winegrapes

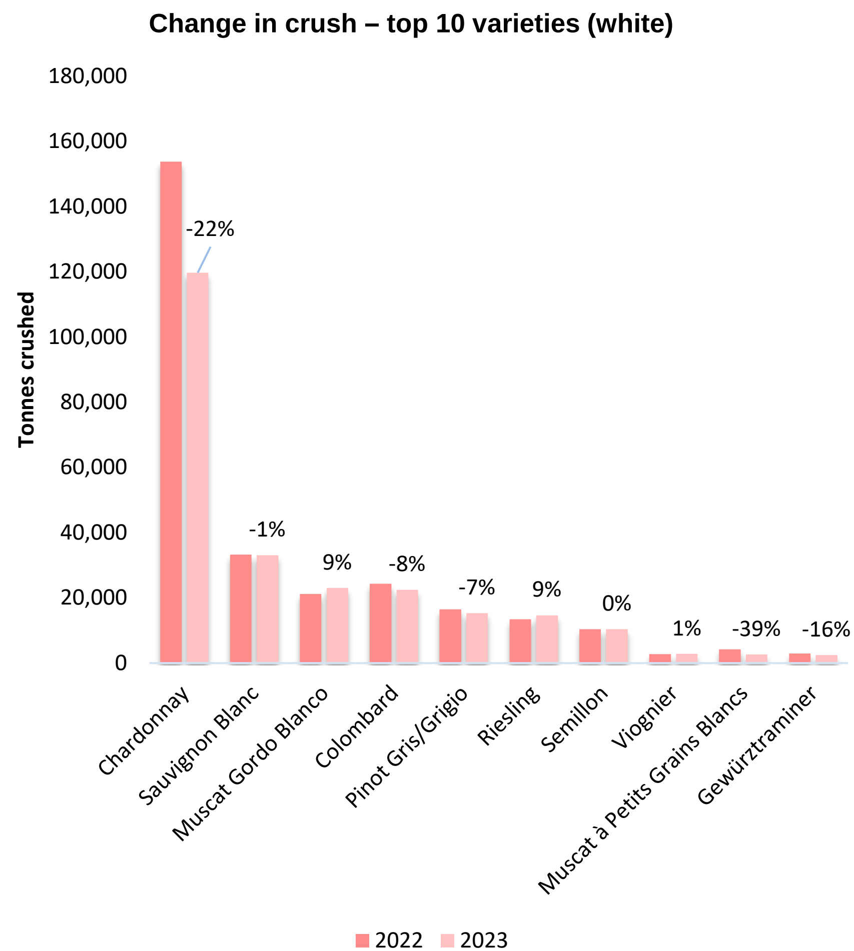
	2022	2023	% change
Red			
Shiraz	234,985	212,049	-10%
Cabernet Sauvignon	156,589	94,913	-39%
Merlot	46,790	34,931	-25%
Pinot Noir	16,341	14,493	-11%
Other red	17,971	12,781	-29%
Petit Verdot	13,280	12,432	-6%
Grenache	11,091	10,643	-4%
Mataro/Mourvedre	4,521	4,662	3%
Malbec	3,684	2,648	-28%
Sangiovese	2,043	1,921	-6%
Durif	1,693	1,831	8%
Tempranillo	2,481	1,744	-30%
Ruby Cabernet	1,978	1,650	-17%
Cabernet Franc	672	398	-41%
Montepulciano	543	395	-27%
Touriga Nacional	298	331	11%
Muscat à Petits Grains Rouges	296	290	-2%
Pinot Meunier	159	166	4%
Nero d'Avola	136	159	17%
Graciano	109	122	12%
Barbera	95	65	-32%
Nebbiolo	81	53	-34%
Lagrein	65	36	-44%
Red Total	**515,901**	**408,715**	**-21%**



State summary 2023

Year-on-year comparison by variety 2023 vs 2022 – white winegrapes

	2022	2023	% change
White			
Chardonnay	153,767	119,736	-22%
Sauvignon Blanc	33,275	33,051	-1%
Muscat Gordo Blanco	21,206	23,032	9%
Colombard	24,364	22,466	-8%
Pinot Gris/Grigio	16,444	15,289	-7%
Riesling	13,445	14,648	9%
Semillon	10,359	10,409	0%
Viognier	2,762	2,799	1%
Muscat à Petits Grains Blancs	4,251	2,594	-39%
Gewürztraminer	2,885	2,415	-16%
Verdelho	2,505	2,023	-19%
Chenin blanc	1,431	1,280	-11%
Other white	1,214	1,232	1%
Vermentino	963	933	-3%
Fiano	347	479	38%
Prosecco	512	440	-14%
Grüner Veltliner	265	239	-10%
Marsanne	96	121	26%
Roussanne	67	87	30%
White Total	**290,158**	**253,270**	**-13%**
Grand Total	**806,059**	**661,984**	**-18%**



State summary 2023

Current plantings by variety and year planted – red winegrapes

Variety	Area (hectares) Pre-2020	2020	2021	2022	Total area	% planted in 2022
Red winegrapes						
Aglianico	12	0	1	1	14	7%
Alicante Bouschet	21	0	0	0	21	0%
Barbera	31	0	0	1	32	3%
Cabernet Franc	154	0	1	0	155	0%
Cabernet Sauvignon	17,527	277	69	32	17,905	0%
Carignan	15	0	0	0	15	0%
Cinsault	10	0	0	0	10	0%
Dolcetto	20	0	0	1	21	5%
Durif (Petite Sirah)	88	13	1	0	102	0%
Gamay	8	1	3	5	17	29%
Graciano	19	1	0	0	20	0%
Grenache	1,594	66	44	17	1,721	1%
Lagrein	20	0	0	0	20	0%
Malbec	385	3	8	7	403	2%
Mataro (Mourvedre)	721	8	5	5	739	1%
Mencia	7	1	0	1	9	11%
Merlot	3,566	4	3	6	3,579	0%
Meunier (Pinot Meunier)	33	0	0	1	34	3%
Montepulciano	65	1	1	1	68	1%
Muscat A Petit Grains Rouge	6	0	0	0	6	0%
Nebbiolo	29	0	0	3	32	9%
Nero d'Avola	47	3	2	3	55	5%
Petit Verdot	655	1	0	0	656	0%
Pinot Noir	1,567	42	34	16	1,659	1%
Ruby Cabernet	128	1	0	5	134	4%
Sagrantino	11	0	0	0	11	0%
Sangiovese	187	1	2	12	202	6%
Saperavi	12	0	0	0	12	0%
Shiraz	27,772	458	154	73	28,457	0%
Tannat	8	0	0	0	8	0%
Tempranillo	315	5	8	4	332	1%
Touriga	62	0	0	0	62	0%
Zinfandel	29	0	0	0	29	0%
Other Red	149	1	7	3	160	3%
Total red varieties	**55,273**	**887**	**343**	**197**	**56,700**	**0%**

Source: Vinehealth Australia

State summary 2023

Current plantings by variety and year planted – white winegrapes and other grapes

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area	% planted in 2022
White winegrapes						
Arneis	11	0	0	1	12	8%
Chardonnay	8,090	12	7	27	8,136	0%
Chenin Blanc	100	0	0	3	103	3%
Colombard	703	0	0	0	703	0%
Doradillo	31	0	0	0	31	0%
Fiano	78	5	16	34	133	26%
Grenache Blanc	5	1	0	1	7	14%
Gruner Veltliner	25	0	1	0	26	0%
Marsanne	21	0	0	0	21	0%
Muscadelle (Tokay)	18	0	0	0	18	0%
Muscat A Petit Grains Blanc (White Frontignac)	157	0	0	0	157	0%
Muscat Gordo Blanco	805	1	0	0	806	0%
Palomino	11	0	0	0	11	0%
Pedro Ximenez	14	0	0	0	14	0%
Pinot Blanc	5	0	0	0	5	0%
Pinot Gris	1,132	5	16	6	1,159	1%
Prosecco	20	0	1	9	30	30%
Riesling	2,250	13	12	11	2,286	0%
Roussanne	22	0	0	1	23	4%
Sauvignon Blanc	2,179	5	19	18	2,221	1%
Savagnin	31	0	0	4	35	11%
Semillon	711	0	0	1	712	0%
Sultana	95	0	0	0	95	0%
Traminer (Gewurztraminer)	171	2	0	0	173	0%
Trebbiano	13	0	0	0	13	0%
Verdelho	134	0	0	0	134	0%
Vermentino	46	1	0	0	47	0%
Viognier	286	0	0	0	286	0%
Other White	79	3	9	9	100	9%
Total white varieties	**17,243**	**48**	**81**	**125**	**17,497**	**1%**
Unknown variety	1,041	53	0	0	1,094	0%
Rootstock	39	0	0	0	39	0%
Multi-purpose red	61	0	0	0	61	0%
Multi-purpose white	66	0	0	0	66	0%
Table grapes - red	16	1	0	1	18	6%
Table grapes - white	10	0	0	0	10	0%
Total all varieties	**73,749**	**989**	**424**	**323**	**75,485**	**0%**

Source: Vinehealth Australia

State summary 2023

Current plantings by zone, region and year planted

Zone	Region	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Barossa	Barossa Valley	11,427	146	98	29	11,700	0%
	Barossa zone - other	211	2	0	0	213	0%
	Eden Valley	2,267	12	16	4	2,299	0%
	Total for Barossa	**13,905**	**160**	**114**	**33**	**14,212**	**0%**
Far North	Southern Flinders Ranges	168	0	0	0	168	0%
	Total for Far North	**168**	**0**	**0**	**0**	**168**	**0%**
Fleurieu	Currency Creek	985	0	7	0	992	0%
	Fleurieu zone - other	156	0	0	0	156	0%
	Kangaroo Island	145	0	0	1	146	1%
	Langhorne Creek	5,818	48	14	4	5,884	0%
	McLaren Vale	7,193	116	42	24	7,375	0%
	Southern Fleurieu	452	0	0	0	452	0%
	Total for Fleurieu	**14,749**	**164**	**63**	**29**	**15,005**	**0%**
Limestone Coast	Coonawarra	5,641	98	22	28	5,789	0%
	Limestone Coast zone - other	1,761	3	2	5	1,771	0%
	Mount Benson	490	12	0	4	506	1%
	Mount Gambier	251	0	0	0	251	0%
	Padthaway	3,742	211	18	4	3,975	0%
	Robe	599	0	2	0	601	0%
	Wrattonbully	2,696	6	32	17	2,751	1%
	Total for Limestone Coast	**15,180**	**330**	**76**	**58**	**15,644**	**0%**
Lower Murray	Lower Murray zone - other	359	8	0	0	367	0%
	Riverland	20,080	163	101	102	20,446	0%
	Total for Lower Murray	**20,439**	**171**	**101**	**102**	**20,813**	**0%**
Mount Lofty Ranges	Adelaide Hills	3,589	56	22	41	3,708	1%
	Adelaide Plains	351	1	2	0	354	0%
	Clare Valley	4,953	96	45	60	5,154	1%
	Mount Lofty Ranges zone – other	345	11	1	0	357	0%
	Total for Mount Lofty Ranges	**9,238**	**164**	**70**	**101**	**9,573**	**1%**
The Peninsulas	The Peninsulas	70	0	0	0	70	0%
	Total for The Peninsulas	**70**	**0**	**0**	**0**	**70**	**0%**
	Total for all GIs	**73,749**	**989**	**424**	**323**	**75,485**	**0%**

Source: Vinehealth Australia

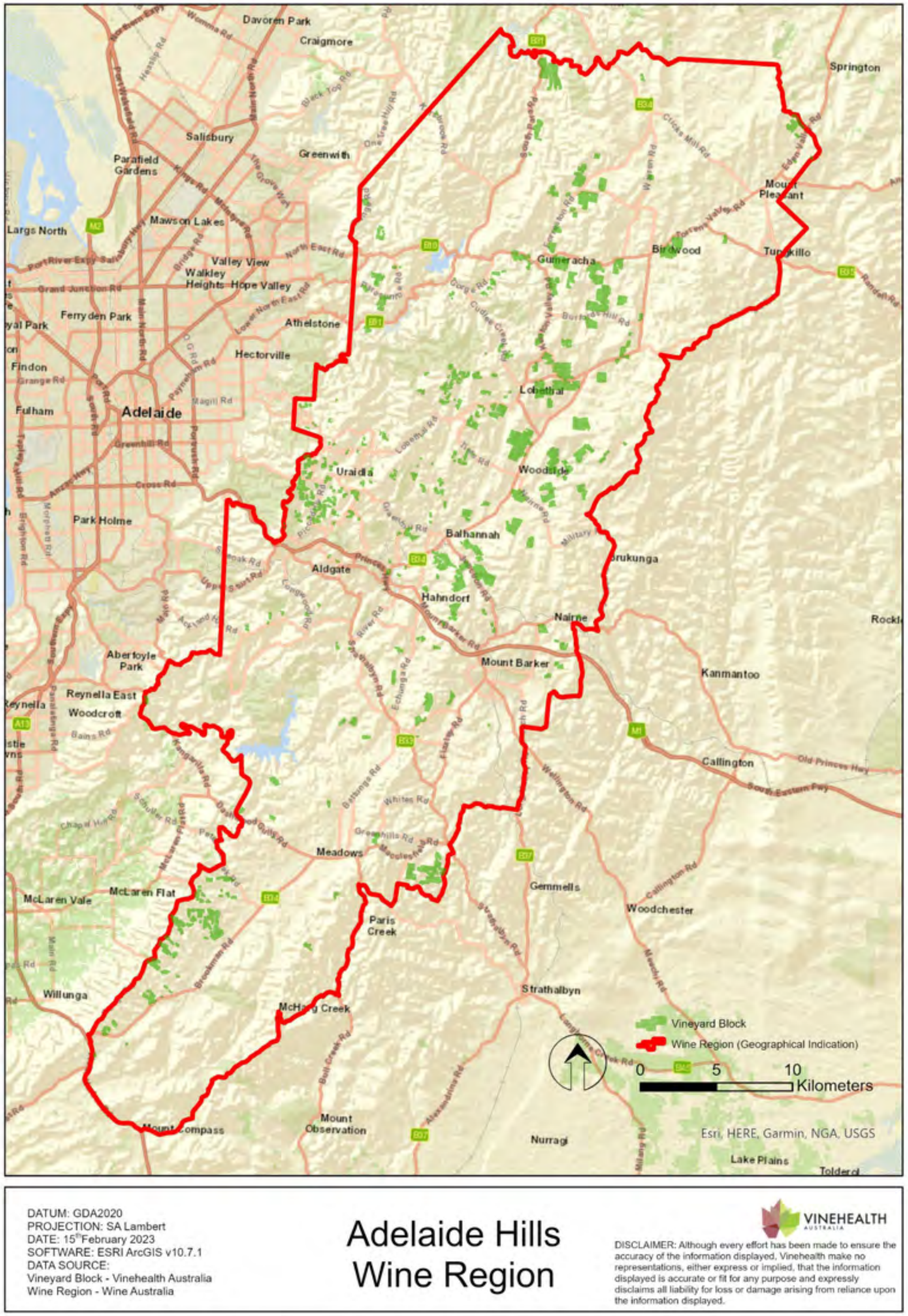
State summary 2023

Number of registered owners by region and property size

Zone	GI Region	< 10 ha Area (ha)	< 10 ha # reg owners	10 - <25 ha Area (ha)	10 - <25 ha # reg owners	25 - <50 ha Area (ha)	25 - <50 ha # reg owners	50 - <100 ha Area (ha)	50 - <100 ha # reg owners	100+ ha Area (ha)	100+ ha # reg owners	Total Area (ha)	Total # registered owners
Barossa	Barossa Valley	1,310	325	2,218	142	2,422	71	1,526	23	4,224	17	11,700	578
	Barossa zone - other	17	3	10	1	0	0	61	1	126	1	213	6
	Eden Valley	386	88	509	33	362	11	329	5	713	3	2,299	140
Far North	Southern Flinders Ranges	14	5	103	6	51	1	0	0	0	0	168	12
Fleurieu	Currency Creek	62	11	191	12	123	3	65	1	551	2	992	29
	Fleurieu zone - other	16	6	43	3	0	0	97	1	0	0	156	10
	Kangaroo Island	108	20	38	3	0	0	0	0	0	0	146	23
	Langhorne Creek	92	20	327	20	801	23	1,119	17	3,545	12	5,884	92
	McLaren Vale	1,579	368	1,806	114	1,180	36	853	12	1,957	8	7,375	538
	Southern Fleurieu	100	30	33	3	227	6	92	1	0	0	452	40
Limestone Coast	Coonawarra	258	46	573	35	556	16	930	14	3,472	10	5,789	121
	Limestone Coast zone - other	54	14	62	4	94	9	52	1	1,509	6	1,771	28
	Mount Benson	23	4	85	5	27	1	212	3	159	1	506	14
	Mount Gambier	51	16	22	2	80	2	98	1	0	0	251	21
	Padthaway	23	3	34	3	230	6	847	11	2,841	12	3,975	35
	Robe	8	2	39	2	81	2	54	1	419	2	601	9
	Wrattonbully	77	13	241	14	500	12	496	7	1,437	6	2,751	52
Lower Murray	Lower Murray zone - other	47	11	203	11	117	4	0	0	0	0	367	26
	Riverland	2,436	518	4,022	261	2,929	83	2,550	35	8,509	33	20,446	930
Mount Lofty Ranges	Adelaide Hills	738	189	987	58	792	24	917	14	274	2	3,708	287
	Adelaide Plains	132	44	41	3	181	4	0	0	0	0	354	51
	Clare Valley	637	171	717	42	744	22	731	10	2,325	13	5,154	258
	Mount Lofty Ranges zone - other	85	26	75	5	89	3	0	0	108	1	357	35
The Peninsulas	The Peninsulas	16	4	21	2	33	1	0	0	0	0	70	7
	Totals by size category	**8,269**	**1,937**	**12,400**	**784**	**11,619**	**340**	**11,029**	**158**	**32,169**	**129**		
	Totals for SA											**75,485**	**3,234**

Note: registered vineyard owners can have vineyards in multiple regions. The total number of registered owners is therefore lower than the sum of the category totals for number of registered owners as the grand total only counts each owner once.

Source: Vinehealth Australia



SA Winegrape Crush Survey 2023

Regional Summary Report

Adelaide Hills Wine Region

Wine Australia July 2023

Adelaide Hills

Vintage overview

VINTAGE REPORT

The vagaries of the 2022/2023 growing season will be long remembered by grape growers. Winter rainfall was close to average and the season began with full soil moisture profiles. Despite an unusually dry July, rainfall in June and August meant that access to vineyards was difficult early in the season, particularly in low-lying and steep sections. A wet October and very wet November (275% of the November Long-Term Average [LTA] rainfall for Lenswood) combined to make vineyard access extremely difficult, particularly for disease management. Shoot growth and development of flowers was slowed by cold as well as wet conditions which persisted into early December. Fortunately, conditions improved just after flowering commenced. A welcome break in the adverse weather reduced the risk of diseases but impacted on fruit set and crop levels, particularly in early flowering varieties.

The remainder of the growing season was relatively dry (at LTA levels) meaning that concerns over disease control were greatly reduced. Grape canopies were able to reach full size as they kept growing into early January. Good-sized canopies, a smaller than average crop together with a warm February enhanced early ripening. However, cooler than average conditions in March and April slowed ripening considerably with the latest crops having to hang into late April to May to reach target sugar levels.

Below average crop loads and a long cool ripening meant that the harvest period was one of the latest since the 1990s and early 2000s. These autumn conditions resulted in wines which will maintain the high quality for which the Adelaide Hills is renowned.

Richard Hamilton, Hamilton Viticulture Pty Ltd on behalf of Adelaide Hills Wine Region Inc.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Adelaide Hills winegrapes in 2023 was 18,125 tonnes, down by 12 per cent compared with the prior year’s crush. Over the past five years (up to 2022), the average crush for the Adelaide Hills has been 21,188 tonnes, making this year’s crush also 12 per cent below the five-year average.

There were 83 respondents to the survey who reported crushing grapes from the Adelaide Hills in 2023, compared with 95 in 2022.

The total value of winegrapes in 2023 was $39 million, the same as last year, with the decreased production partly offset by an increase in the average purchase value of grapes, which was up by 14 per cent from $1928 to $2189 per tonne.

There were increases in average prices for the three largest varieties: Sauvignon Blanc up by 12 per cent to $1988 per tonne, Chardonnay up by 13 per cent to $2290 per tonne and Pinot Noir up by 15 per cent to $2544 per tonne.

The price dispersion data shows an upward shift in prices paid, with 67 per cent of all grapes being purchased at $2000 per tonne or above compared with 37 per cent in 2022.

There were 41 hectares of new vines planted in the region in the 2022–23 season compared with 23 hectares in the previous season. A quarter of the new plantings were Pinot Noir (10 hectares).

The total vineyard area in the Adelaide Hills as at 30 April 2023 was 3708 hectares – almost identical to 2022, and 122 hectares less than the total area five years ago.

Adelaide Hills

Winegrape intake summary table – red winegrapes

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	26	$68,880	$2,695	16%	9	25%	34	$92,277
Cabernet Franc					5	100%	5	$7,039
Cabernet Sauvignon	296	$381,381	$1,289	-19%	46	13%	342	$440,531
Durif					4	100%	4	$3,856
Graciano	0						0	$1,152
Grenache	6						6	$11,348
Malbec	0						0	$306
Mataro/Mourvedre					2	100%	2	$3,976
Merlot	250	$245,117	$982	-6%	12	4%	261	$256,443
Montepulciano	26	$57,190	$2,217	2%			26	$57,190
Nebbiolo	15	$34,339	$2,242	-6%	25	62%	40	$89,675
Nero d'Avola	12						12	$18,328
Pinot Meunier	102	$263,645	$2,584	20%			102	$263,645
Pinot Noir	3,361	$8,551,554	$2,544	15%	786	19%	4,147	$10,551,784
Sangiovese	43	$84,636	$1,955	0%			43	$84,636
Shiraz	424	$776,990	$1,834	-2%	369	47%	793	$1,453,420
Tempranillo	100	$225,954	$2,268	9%	24	19%	123	$279,632
Other red	78	$201,508	$2,596	6%	19	20%	97	$251,838
Red Total	**4,737**	**$10,922,327**	**$2,306**	**14%**	**1,300**	**22%**	**6,037**	**$13,867,075**

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

Adelaide Hills

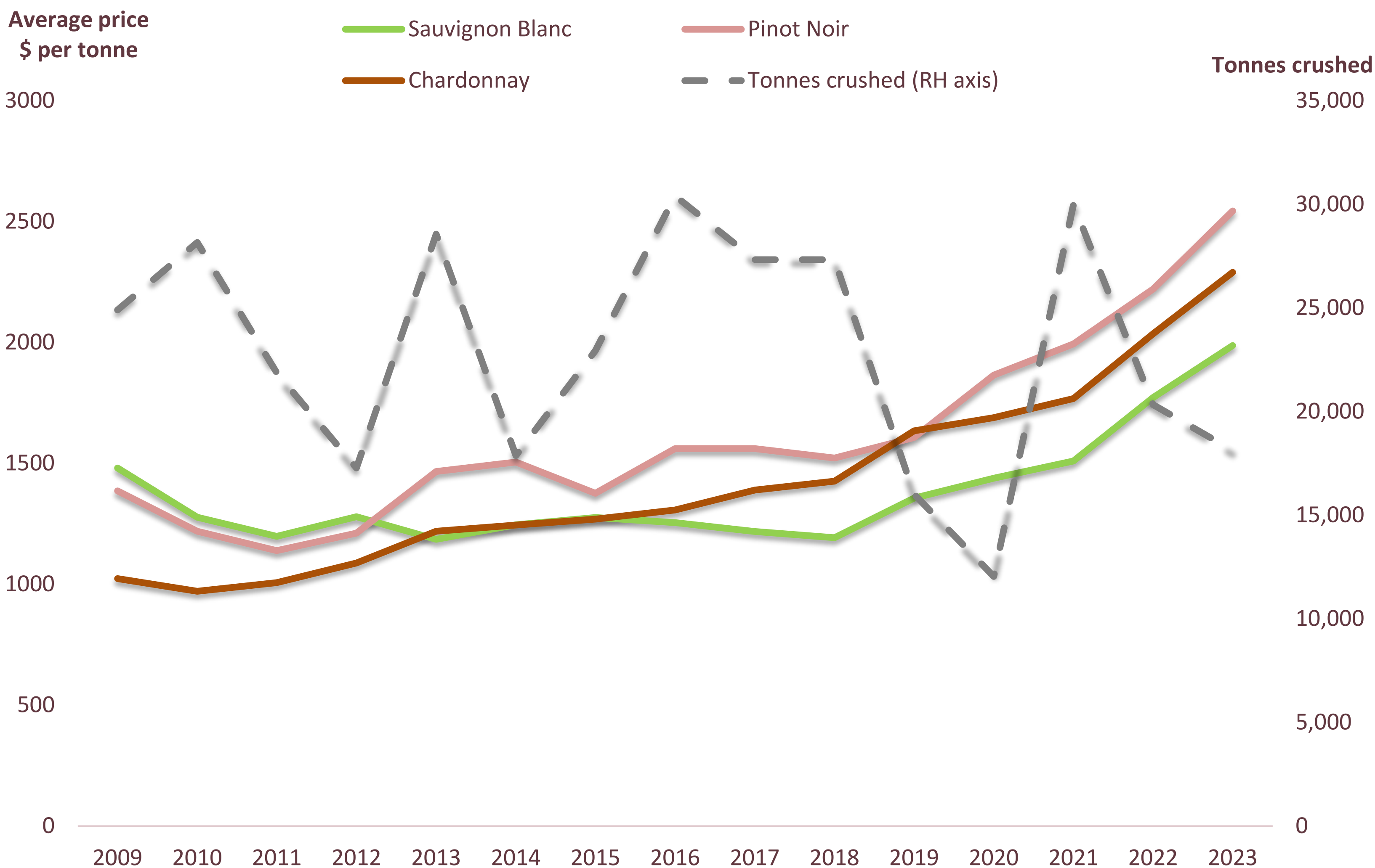
Winegrape intake summary table – white winegrapes

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	3,608	$8,265,374	$2,290	13%	855	19%	4,462	$10,223,016
Fiano	9				5	37%	14	$30,536
Gewürztraminer	39	$79,546	$2,021	3%	7	14%	46	$92,930
Grüner Veltliner	58	$126,566	$2,190	-4%	67	54%	125	$272,611
Muscat à Petits Grains Blancs	11						11	$14,784
Pinot Gris/Grigio	959	$2,047,523	$2,135	16%	497	34%	1,456	$3,107,735
Prosecco	28				30	52%	57	$61,043
Riesling	88	$200,222	$2,265	27%	44	33%	132	$299,202
Sauvignon Blanc	3,838	$7,629,528	$1,988	12%	1,755	31%	5,593	$11,119,512
Semillon	66				29	31%	96	$174,003
Vermentino	12						12	$22,050
Viognier	22	$28,922	$1,323	-10%	5	20%	27	$36,159
Other white	25	$52,421	$2,095	16%	32	56%	57	$116,198
White Total	**8,763**	**$18,636,610**	**$2,127**	**13%**	**3,326**	**28%**	**12,088**	**$25,569,780**
Grand Total	**13,500**	**$29,558,936**	**$2,189**	**14%**	**4,626**	**26%**	**18,125**	**$39,436,854**

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

Adelaide Hills

Historical weighted average price vs tonnes crushed



Adelaide Hills

Price dispersion – purchased grapes (red)

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Barbera					26	26
Cabernet Sauvignon		8	136	152		296
Graciano					0	0
Grenache					6	6
Malbec					0	0
Merlot			247	3		250
Montepulciano					26	26
Nebbiolo					15	15
Nero d'Avola		5			7	12
Pinot Meunier				18	84	102
Pinot Noir		32		388	2,941	3,361
Sangiovese				32	12	43
Shiraz			39	264	120	424
Tempranillo					100	100
Other red		6		5	67	78
Red Total		**50**	**422**	**862**	**3,403**	**4,737**

Adelaide Hills

Price dispersion – purchased grapes (white)

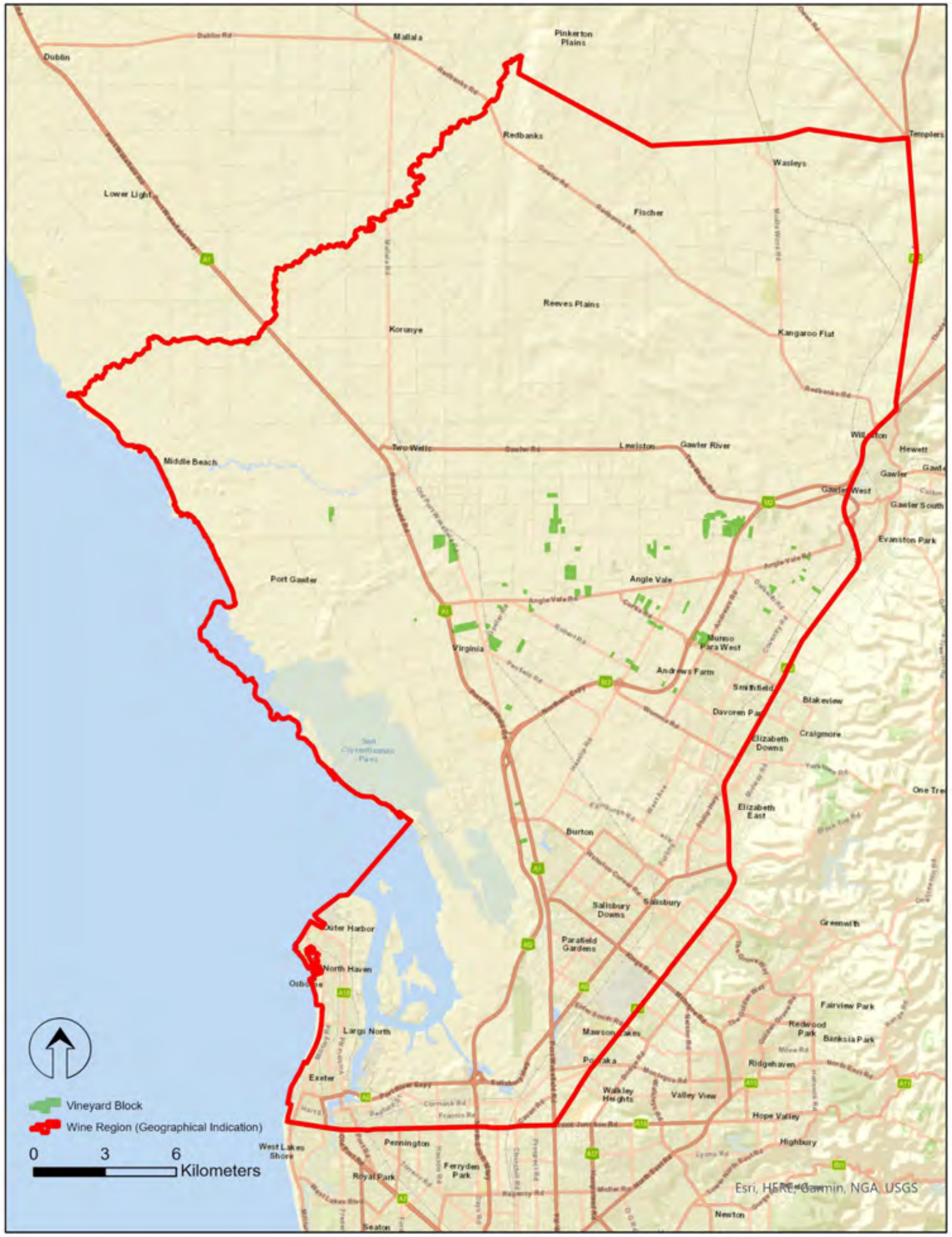
	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
White						
Chardonnay	15		14	840	2,739	3,608
Fiano					9	9
Gewürztraminer				5	35	39
Grüner Veltliner				11	47	58
Muscat à Petits Grains Blancs			11			11
Pinot Gris/Grigio				280	679	959
Prosecco			28			28
Riesling				13	76	88
Sauvignon Blanc			169	1,675	1,993	3,838
Semillon				33	33	66
Vermentino				12		12
Viognier			8	14		22
Other white				8	17	25
White Total	**15**		**229**	**2,892**	**5,627**	**8,763**
Total purchased	**15**	**50**	**651**	**3,754**	**9,029**	**13,500**

Adelaide Hills

Current plantings by variety and year planted

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Barbara	6	0	0	1	7	14%
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	197	0	0	0	197	0%
Dolcetto	1	0	0	1	2	50%
Gamay	6	1	2	5	14	36%
Grenache	2	0	1	0	3	0%
Malbec	2	1	0	0	3	0%
Mencia	2	0	0	0	2	0%
Merlot	121	0	0	0	121	0%
Meunier (Pinot Meunier)	19	0	0	1	20	5%
Montepulciano	5	0	0	0	5	0%
Nebbiolo	13	0	0	3	16	19%
Nero d'Avola	3	0	0	0	3	0%
Petit Verdot	2	0	0	0	2	0%
Pinot Noir	651	35	15	10	711	2%
Sangiovese	15	0	0	0	15	0%
Shiraz	387	4	0	4	395	1%
Tempranillo	31	0	0	0	31	0%
Other Red	14	0	0	1	15	2%
Total red varieties	**1,483**	**41**	**18**	**26**	**1,568**	**2%**
White winegrapes						
Arneis	5	0	0	1	6	17%
Chardonnay	811	9	2	1	823	0%
Fiano	9	0	0	3	12	25%
Gruner Veltliner	20	0	1	0	21	0%
Muscat Gordo Blanco	1	0	0	0	1	0%
Pinot Blanc	2	0	0	0	2	0%
Pinot Gris	251	2	0	1	254	0%
Prosecco	5	0	0	0	5	0%
Riesling	47	1	0	3	51	6%
Sauvignon Blanc	839	1	1	4	845	1%
Savagnin	6	0	0	0	6	0%
Semillon	30	0	0	0	30	0%
Traminer (Gewurztraminer)	13	2	0	0	15	0%
Viognier	15	0	0	0	15	0%
Other White	12	0	0	2	16	13%
Total white varieties	**2,066**	**15**	**4**	**15**	**2,100**	**1%**
Rootstock Block	2	0	0	0	2	0%
Unknown variety	38	0	0	0	38	0%
Total all varieties	**3,589**	**56**	**22**	**41**	**3,708**	**1%**

Source: Vinehealth Australia



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 15th February 2023
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Adelaide Plains Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

Adelaide Plains Wine Region

Wine Australia July 2023

Adelaide Plains

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	118	$62,747	$534	-9%			118	$62,747
Grenache	82				13	14%	96	$95,760
Mataro/Mourvedre	72						72	$110,282
Pinot Noir	58	$83,660	$1,454	0%			58	$83,660
Shiraz	809	$678,999	$839	-14%	2	0%	811	$680,938
Red Total	**1,139**	**$1,018,008**	**$894**	**-9%**	**16**	**1%**	**1,154**	**$1,033,387**
White								
Chardonnay	58						58	$51,085
Muscat Gordo Blanco					6	100%	6	$7,687
Pinot Gris/Grigio	78						78	$96,313
Sauvignon Blanc	192	$278,186	$1,447	0%			192	$278,186
Viognier	9						29	$41,905
Other white					3	100%	3	$3,874
White Total	**357**	**$467,489**	**$1,311**	**0%**	**9**	**2%**	**365**	**$479,051**
Grand Total	**1,495**	**$1,485,497**	**$994**	**-2%**	**25**	**2%**	**1,520**	**$1,512,438**

There were 10 respondents to the survey who reported crushing grapes from the Adelaide Plains in 2023, compared with 11 in 2022

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

Adelaide Plains

Price dispersion – purchased grapes

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Cabernet Sauvignon	84	31		3		118
Grenache			82			82
Mataro/Mourvedre		21		52		72
Pinot Noir	11		14	25	8	58
Shiraz	156	474	6	174		809
Red Total	**251**	**525**	**102**	**253**	**8**	**1,139**
White						
Chardonnay	13	15	31			58
Pinot Gris/Grigio			78			78
Sauvignon Blanc			56	136		192
Viognier			29			29
White Total	**13**	**15**	**194**	**136**		**357**
Total purchased	**263**	**540**	**296**	**388**	**8**	**1,495**

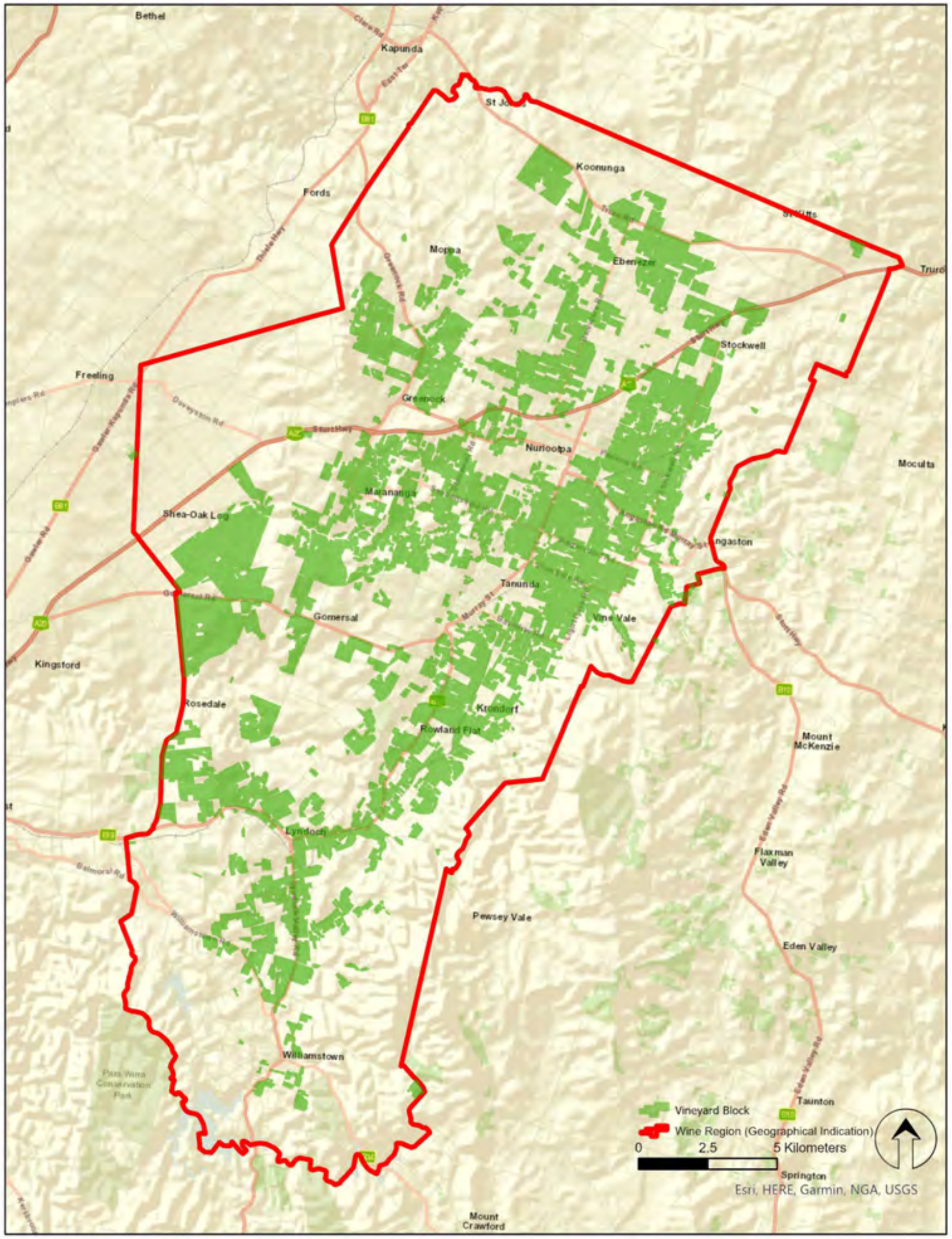
Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Adelaide Plains

Current plantings by variety and year planted

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Sauvignon	49	0	0	0	49	0%
Grenache	19	0	0	0	19	0%
Mataro (Mourvedre)	7	0	0	0	7	0%
Merlot	16	0	0	0	16	0%
Pinot Noir	13	0	0	0	13	0%
Shiraz	136	1	2	0	139	0%
Other Red	17	0	0	0	17	0%
Total red varieties	257	1	2	0	260	0%
White winegrapes						
Chardonnay	26	0	0	0	26	0%
Colombard	1	0	0	0	1	0%
Pinot Gris	32	0	0	0	32	0%
Riesling	1	0	0	0	1	0%
Sauvignon Blanc	16	0	0	0	16	0%
Other White	7	0	0	0	7	0%
Total white varieties	83	0	0	0	83	0%
Unknown variety	11	0	0	0	11	0%
Total all varieties	351	1	2	0	354	0%

Source: Vinehealth Australia



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 27th April 2022
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Barossa Valley Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

Barossa Valley Wine Region

Wine Australia July 2023

Barossa Valley

Vintage overview

VINTAGE REPORT

After a worryingly dry July where the Barossa Valley had only 54% of average rainfall, the skies opened and four months of well-above average rainfall followed. This filled dams and soil profiles but made it difficult to get onto vineyards in some places, which exacerbated the higher-than-normal disease pressure. Wet soils combined with cooler than average daytime temperatures in September and October caused vine growth to start 2-3 weeks later than usual.

The later season continued through spring and into summer, as the vines didn't flower in many cases until December. Set was very dependent on the weather on the day of flowering, but in general reasonable crops were set. It was great to see many vineyards that had been hit by hail in October 2021 recover and look terrific.

Much of the summer rain that was predicted didn't fall in the Barossa, with the region receiving only 43mm, or 56% of average. Summer days were sunny, with both maximum and minimum temperatures average and no heatwaves. Vines ripened slowly in this balmy weather, with veraison not occurring in many varieties until February.

Harvest eventually started in early March for some lighter white crops, but not until the middle of March for even the earliest red sites and varieties.

March and April continued to be relatively fine with just below average rainfall and temperatures. There were many grapes still to be harvested after Easter, and some of the later sites and varieties were not harvested until May. The hard work that was needed in the vineyard this year has in most cases paid off, as the long hang time has resulted in some exceptional flavours and structure. Reds have intense, rich and balanced flavours and colours; whites have lovely aromatics, finesse and great natural acidity. The early standout is Cabernet Sauvignon.

Louisa Rose on behalf of Barossa Australia.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Barossa Valley winegrapes (including Barossa zone – other) was 66,031 tonnes in 2023, 33 per cent above the 2022 reported crush of 49,640 tonnes and only 10 per cent below the record crush in 2017 of 73,009 tonnes. Over the past five years (up to 2022), the average crush for the Barossa Valley has been 47,724 tonnes, making this year's crush 38 per cent above the five-year average.

There were 83 respondents to the survey who reported crushing grapes from the Barossa Valley in 2023, compared with 88 in 2022.

The total estimated value of winegrapes in 2023 was $126.8 million compared with $101.4 million in 2022. The higher production eased the 7 per cent overall decrease in the average purchase value of grapes, which decreased from $2033 to $1897 per tonne.

The major red varieties declined in average value, with the exception of Merlot, which was up 10 per cent to $1423 per tonne, and Grenache which stayed at $2395 per tonne. Shiraz continued to decrease from its peak of $2612 per tonne in 2020; it was down 11 per cent to $1988 per tonne. NB These prices relate to Barossa Valley only.

The price dispersion data shows a slight downward shift, with 49 per cent of red varieties purchased at $2000 and above, compared with 51 per cent in 2022.

According to Vinehealth Australia data, the total vineyard area in the Barossa Valley as at 30 April 2023 was 11,913 hectares, including 213 hectares in Barossa zone – other. This is virtually the same as last year and about 259 hectares more than it was 5 years ago.

There were 29 hectares of new vines planted in the region in the 2022-23 season (including top-working and replacements). Of these, there were 16 hectares of Shiraz and 5 hectares of Grenache planted.

Barossa Valley

Barossa Valley* winegrape intake summary table – red varieties

** Includes Barossa zone other – 1077 tonnes*

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	2						2	$4,880
Cabernet Franc	43	$44,930	$1,043	0%	16	27%	59	$61,418
Cabernet Sauvignon	4,820	$8,992,457	$1,866	-5%	4,237	47%	9,057	$16,883,060
Durif	61	$104,720	$1,712	-11%	28	32%	89	$153,043
Graciano	22	$30,456	$1,397	0%	7	25%	29	$40,585
Grenache	2,509	$6,008,889	$2,395	0%	1,274	34%	3,783	$9,058,626
Malbec	63	$141,566	$2,244	9%	71	53%	134	$300,944
Mataro/Mourvedre	714	$1,582,642	$2,218	-1%	506	42%	1,220	$2,705,654
Merlot	506	$719,894	$1,423	10%	792	61%	1,298	$1,846,589
Montepulciano	54	$109,123	$2,019	2%	82	60%	136	$275,028
Muscat à Petits Grains Rouges	2				25	93%	26	$26,137
Nero d'Avola	14	$25,992	$1,800	0%	35	71%	49	$88,144
Petit Verdot	18	$26,127	$1,443	-17%	60	77%	78	$112,262
Pinot Meunier					6	100%	6	$12,231
Pinot Noir	98	$121,730	$1,237	-10%	32	25%	131	$161,849
Sangiovese	250	$333,372	$1,331	-14%	73	22%	323	$429,929
Shiraz	25,078	$49,883,686	$1,989	-11%	19,572	44%	44,651	$89,319,440
Tempranillo	262	$488,088	$1,861	2%	72	22%	334	$621,970
Touriga Nacional	10				85	90%	95	$151,438
Other red	308	$541,487	$1,756	14%	123	29%	432	$747,635
Red Total	**34,836**	**$69,177,288**	**$1,985**	**-8%**	**27,095**	**44%**	**61,931**	**$123,000,863**

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

Barossa Valley

Barossa Valley* winegrape intake summary table – white varieties

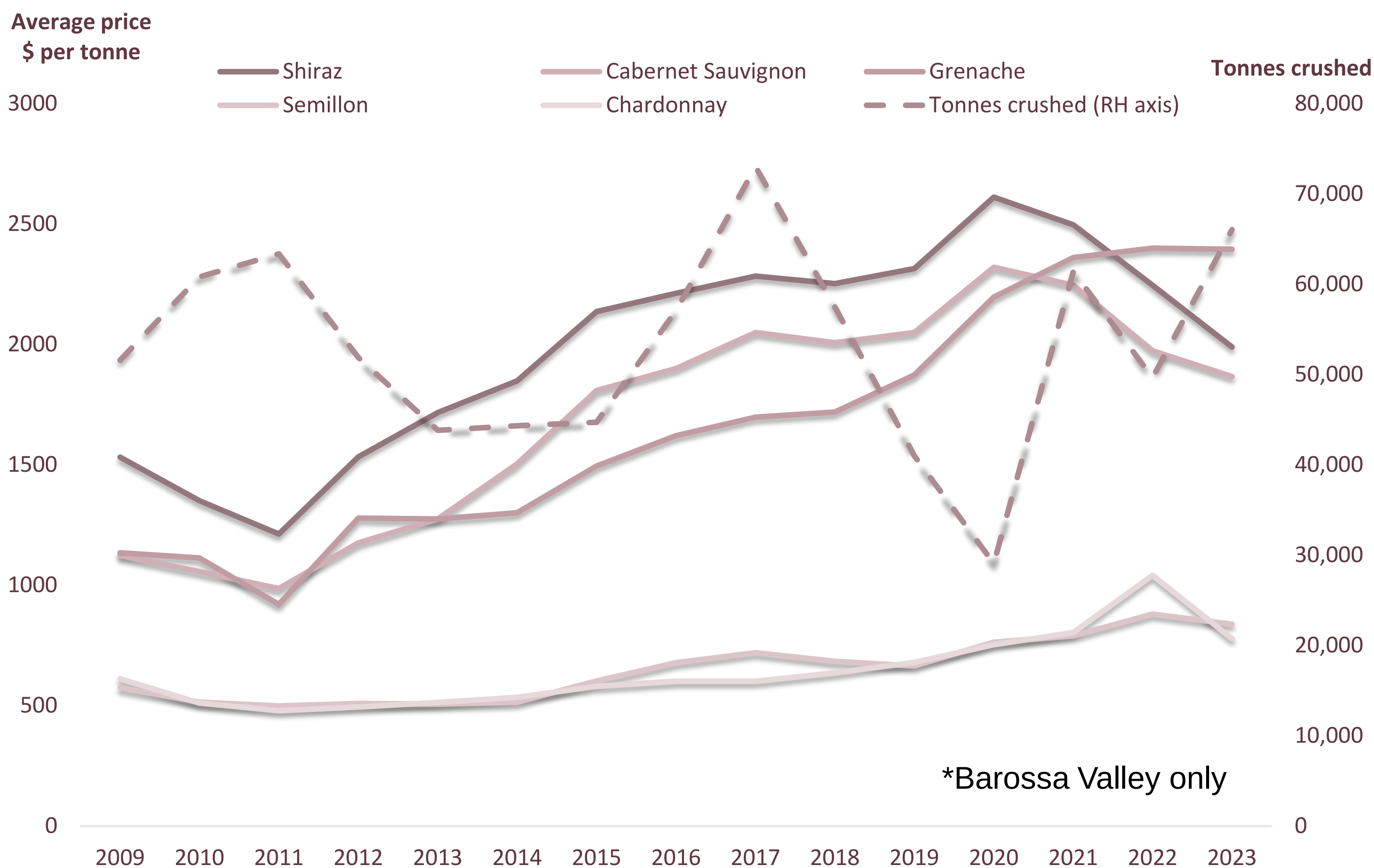
** Includes Barossa zone other – 3 tonnes*

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	848	$660,382	$778	-5%	240	22%	1,088	$847,112
Chenin blanc	18						18	$26,231
Fiano	3				29	90%	33	$52,048
Gewürztraminer	15						15	$10,416
Marsanne	18	$32,986	$1,852	11%	51	74%	69	$127,265
Muscat à Petits Grains Blancs	132	$127,351	$967	-3%	97	42%	229	$221,205
Pinot Gris/Grigio	136	$133,749	$986	-11%	82	38%	218	$214,667
Riesling	476	$414,104	$870	-5%	96	17%	572	$497,597
Roussanne	16	$27,774	$1,701	0%	3	16%	19	$33,107
Sauvignon Blanc	222				39	15%	261	$236,244
Semillon	816	$683,918	$838	-6%	204	20%	1,020	$854,398
Vermentino	109	$103,980	$958	0%	11	9%	120	$114,438
Viognier	286	$386,318	$1,351	-6%	42	13%	328	$442,645
Other white	22	$26,937	$1,236	-27%	90	81%	112	$134,609
White Total	**3,116**	**$2,840,332**	**$911**	**-3%**	**984**	**24%**	**4,100**	**$3,811,981**
Grand Total	**37,952**	**$72,017,620**	**$1,897**	**-7%**	**28,079**	**43%**	**66,031**	**$126,812,844**

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

Barossa Valley

Historical weighted average price* vs tonnes crushed



Barossa Valley

Price dispersion – purchased grapes (red)

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Barbera					2	2
Cabernet Franc		9	29	5		43
Cabernet Sauvignon	57	201	1,569	700	2,293	4,820
Durif			33	4	25	61
Graciano			6	16		22
Grenache	15		91	223	2,181	2,509
Malbec			7	28	28	63
Mataro/Mourvedre			21	121	568	710
Merlot	63	192	61	67	123	506
Montepulciano				29	25	54
Muscat à Petits Grains Rouges		1	1			2
Nero d'Avola				14		14
Petit Verdot			8	6	4	18
Pinot Noir	9	4	56		29	98
Sangiovese			226	13	12	250
Shiraz	294	1,865	6,503	4,714	11,675	25,051
Tempranillo			13	216	33	262
Touriga Nacional				10		10
Other red			104	50	154	308
Red Total	**437**	**2,272**	**8,727**	**6,217**	**17,151**	**34,805**

Barossa Valley

Price dispersion – purchased grapes (white)

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
White						
Chardonnay	123	531	173	22		848
Chenin blanc			6	12		18
Fiano				3		3
Gewürztraminer		15				15
Marsanne				6	12	18
Muscat à Petits Grains Blancs		33	95	3		132
Pinot Gris/Grigio		46	75	14		136
Riesling		167	301	9		476
Roussanne				16		16
Sauvignon Blanc		6	216			222
Semillon	51	542	182	17	17	809
Vermentino		89		19		109
Viognier			253	30	3	286
Other white		1	17	3		22
White Total	**174**	**1,429**	**1,318**	**155**	**32**	**3,109**
Total purchased	**611**	**3,702**	**10,046**	**6,373**	**17,183**	**37,914**

Barossa Valley

Barossa Valley* current plantings by variety and year planted – red varieties

** Includes Barossa zone other – 211 hectares (red)*

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
	Area (hectares)					
Red winegrapes						
Aglianico	2	0	0	0	2	0%
Alicante Bouschet	15	0	0	0	15	0%
Barbera	3	0	0	0	3	0%
Cabernet Franc	24	0	0	0	24	0%
Cabernet Sauvignon	1,657	38	13	1	1,709	0%
Carignan	8	0	0	0	8	0%
Cinsault	5	0	0	0	5	0%
Durif (Petite Sirah)	21	0	0	0	21	0%
Graciano	7	0	0	0	7	0%
Grenache	649	46	24	5	724	1%
Malbec	27	1	0	0	28	0%
Mataro (Mourvedre)	300	7	4	4	315	1%
Merlot	219	0	0	0	219	0%
Meunier	2	0	0	0	2	0%
Montepulciano	16	0	0	0	16	0%
Muscat A Petit Grains Rouge	1	0	0	0	1	0%
Nebbiolo	3	0	0	0	3	0%
Nero D'Avola	11	0	0	0	11	0%
Petit Verdot	17	0	0	0	17	0%
Pinot Noir	30	0	0	0	30	0%
Sangiovese	27	0	0	0	27	0%
Saperavi	6	0	0	0	6	0%
Shiraz	7,568	53	55	16	7,692	0%
Tannat	2	0	0	0	2	0%
Tempranillo	80	1	0	0	81	0%
Touriga	18	0	0	0	18	0%
Zinfandel	13	0	0	0	13	0%
Other Red	36	0	0	0	36	0%
Total red varieties	**10,767**	**146**	**96**	**26**	**11,035**	**0%**

Source: Vinehealth Australia

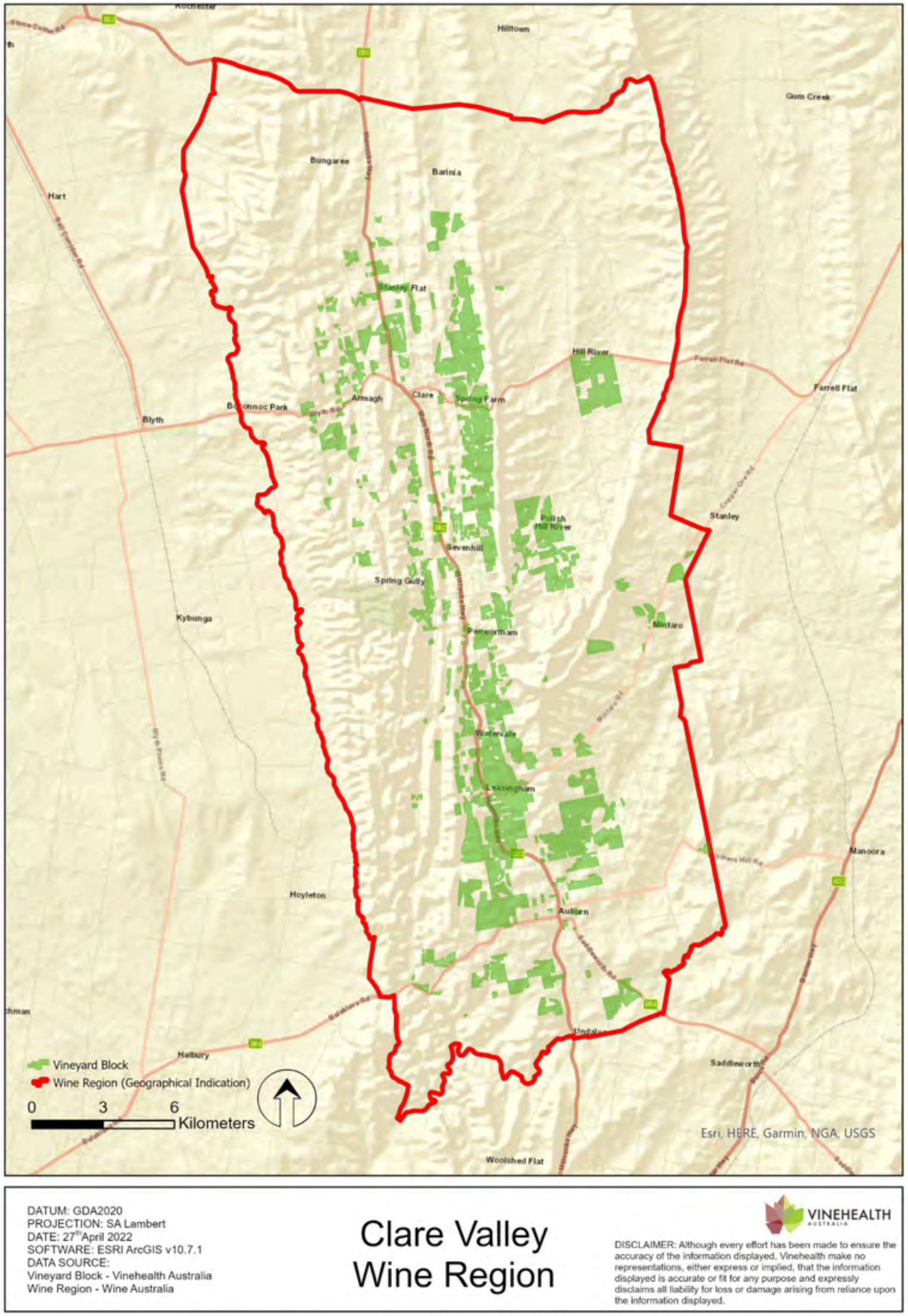
Barossa Valley

Barossa Valley* current plantings by variety and year planted – white varieties

** Includes Barossa zone other – 2 hectares (white)*

Variety	Area (hectares) Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
White winegrapes						
Chardonnay	232	0	0	0	232	0%
Chenin Blanc	10	0	0	0	10	0%
Fiano	5	0	0	0	5	0%
Grenache Blanc	2	1	0	1	4	25%
Marsanne	9	0	0	0	9	0%
Muscadelle (Tokay)	11	0	0	0	11	0%
Muscat A Petit Grains Blanc (White Frontignac)	39	0	0	0	39	0%
Muscat Gordo Blanco	1	0	0	0	1	0%
Palomino	3	0	0	0	3	0%
Pedro Ximenez	5	0	0	0	5	0%
Pinot Gris	11	0	0	0	11	0%
Riesling	118	0	0	0	118	0%
White winegrapes						
Roussanne	4	0	0	0	4	0%
Sauvignon Blanc	39	1	0	0	40	0%
Semillon	231	0	0	0	231	0%
Traminer	5	0	0	0	5	0%
Vermentino	8	0	0	0	8	0%
Viognier	41	0	0	0	41	0%
Other White	15	0	2	2	19	11%
Total white varieties	**789**	**2**	**2**	**3**	**796**	**0%**
Unknown variety	81	0	0	0	81	0%
Multi-purposed red	1	0	0	0	1	0%
Total all varieties	**11,638**	**148**	**98**	**29**	**11,913**	**0%**

Source: Vinehealth Australia



SA Winegrape Crush Survey 2023

Regional Summary Report

Clare Valley Wine Region

Wine Australia July 2023

Clare Valley

Vintage overview

VINTAGE REPORT

Patience, crop management and keeping a watchful eye on the weather were the keys to success in vintage 2023.

The 2022 growing season was one with challenging conditions. The winter-spring period was the wettest since 2016, with close to 700mm falling in the second half of the year which, coupled with cool conditions in September and October, led to budburst being late for most varieties and slower than normal spring growth. Therefore, flowering was three weeks later than average, in early December rather than mid-November, and - reminiscent of the ‘old days’ - harvest did not begin until early March.

The wetter than average spring and early summer, along with some small hail flurries, made for increased disease pressure. Cool weather conditions and solid crops slowed ripening, but minimal rain from Christmas until the end of March kept any disease at bay and led to a sound harvest of pristine, quintessential Clare Valley Riesling, showing fantastic flavour ripeness and natural acidity.

Rain in April delayed the harvest of red varieties and increased disease pressure, especially for late Botrytis infection. Management of crops was challenging in the later part of the season with some of the heavier crops struggling to fully ripen and wineries leaving some of these hanging, rather than picking lower quality fruit.

Seasonal and market conditions have given winemakers the luxury of selecting the best parcels of red fruit which will result in some exceptional quality red wines, with Cabernet Sauvignon looking to be the standout. The long ripening period has led to complexity of flavours and has produced an elegant style of red wine for which the Clare Valley is known.

Anna Baum, Executive Officer – Clare Valley Wine & Grape Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Clare Valley winegrapes was 22,987 tonnes, down by 12 per cent on the 2022 crush of 26,194 tonnes and 19 per cent above the five-year average of 19,364 tonnes (2018–2022). It was the fourth-largest crush in the past 10-year period.

There were 49 respondents to the survey who reported crushing grapes from the Clare Valley in 2023, compared with 52 in 2022.

The total estimated value of winegrapes in 2023 was just under $39 million compared with $43 million in 2022 (a decrease of 10 per cent). The lower production was slightly offset by a 3 per cent increase in the average purchase value of grapes, which increased from $1633 in 2022 to $1688 per tonne.

The average value for the major red varieties increased, with Shiraz, the largest variety, up by 6 per cent to $1862 per tonne an Cabernet Sauvignon up 4 per cent to $1926 per tonne. The average value for Cabernet Sauvignon was higher than that of Shiraz for the second year in a row.

The price dispersion data reflects a small downward shift in prices paid, with 22 per cent of grapes being purchased at $2000 per tonne and above, compared with 24 per cent in 2022.

According to Vinehealth Australia data, the total vineyard area in the Clare Valley as at 30 April 2023 was 5154 hectares, a decrease of 35 hectares compared with the previous year and 94 hectares more than the total area in 2018.

There were 60 hectares of new vines planted in the region in the 2022-23 season (including top-working and replacements), with 22 hectares being Fiano (a 61 per cent increase in total area for this variety).

Clare Valley

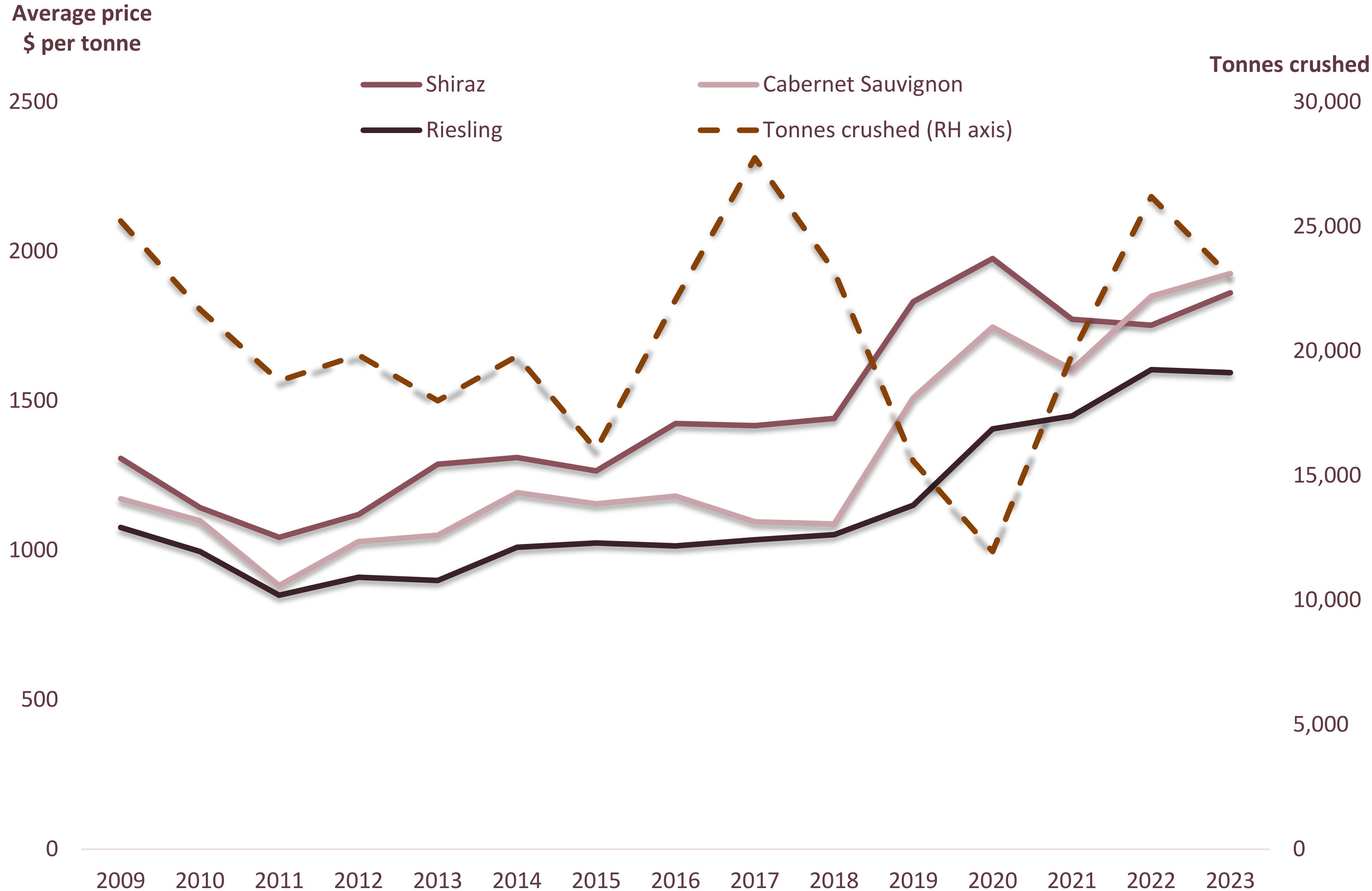
Winegrape intake summary table

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								
Barbera					11	100%	11	$23,251
Cabernet Franc	15	$20,915	$1,381	-10%	20	56%	35	$47,862
Cabernet Sauvignon	2,035	$3,918,539	$1,926	4%	1,857	48%	3,892	$7,495,049
Grenache	94	$158,191	$1,685	-16%	300	76%	394	$663,192
Malbec	129	$194,968	$1,511	-9%	216	63%	345	$521,810
Mataro/Mourvedre	103	$194,222	$1,892	-0%	33	24%	136	$257,121
Merlot	404	$419,272	$1,038	2%	393	49%	797	$827,425
Montepulciano					9	100%	9	$18,338
Nero d'Avola					9	100%	9	$17,650
Petit Verdot	61						61	$98,214
Pinot Noir					55	100%	55	$128,686
Sangiovese	84	$104,406	$1,247	1%	206	71%	289	$360,827
Shiraz	3,563	$6,630,733	$1,862	6%	4,385	55%	7,947	$14,792,716
Tempranillo	70	$102,856	$1,473	36%	104	60%	174	$256,351
Touriga Nacional					7	100%	7	$13,480
Other red					4	100%	4	$3,820
Red Total	**6,557**	**$11,842,316**	**$1,806**	**4%**	**7,609**	**54%**	**14,166**	**$25,525,794**
White								
Chardonnay	421	$439,726	$1,045	14%	222	35%	643	$671,837
Fiano	16				76	83%	92	$172,350
Gewürztraminer	78	$96,213	$1,231	17%	35	31%	113	$139,235
Pinot Gris/Grigio	232	$330,938	$1,424	19%	416	64%	648	$923,029
Riesling	3,643	$5,807,333	$1,594	-1%	3,248	47%	6,891	$10,984,627
Sauvignon Blanc					31	100%	31	$46,380
Semillon	93	$91,615	$989	51%	99	52%	191	$189,112
Verdelho					7	100%	7	$8,899
Vermentino					6	100%	6	$8,609
Viognier					65	100%	65	$94,412
Other white					133	100%	133	$153,290
White Total	**4,483**	**$6,795,160**	**$1,516**	**3%**	**4,338**	**49%**	**8,821**	**$13,391,791**
Grand Total	**11,040**	**$18,637,476**	**$1,688**	**3%**	**11,947**	**52%**	**22,987**	**$38,917,574**

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

Clare Valley

Historical weighted average price vs tonnes crushed



Clare Valley

Price dispersion – purchased grapes

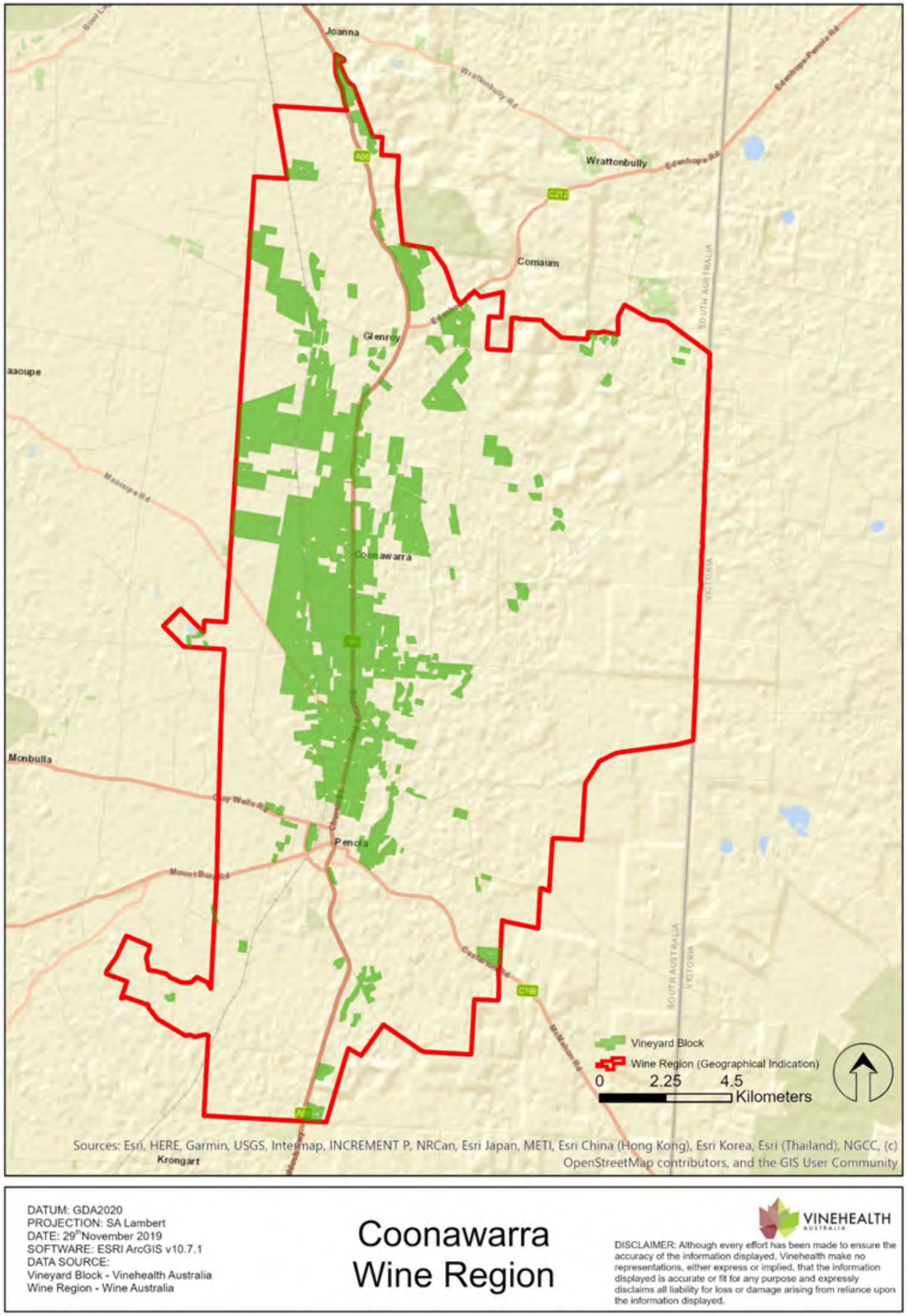
	Tonnes purchased in each segment				
Varieties	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red					
Cabernet Franc		8	7		15
Cabernet Sauvignon		334	752	949	2,035
Grenache		37	37	21	94
Malbec		32	97		129
Mataro/Mourvedre		10	24	69	103
Merlot		404			404
Petit Verdot		2	59		61
Sangiovese		84			84
Shiraz	27	417	1,887	1,227	3,557
Tempranillo		28	42		70
Red Total	**27**	**1,355**	**2,904**	**2,265**	**6,551**
White					
Chardonnay		421			421
Fiano			16		16
Gewürztraminer		70	2	6	78
Pinot Gris/Grigio		175	45	12	232
Riesling	5	1,127	2,347	158	3,637
Semillon	22	71			93
White Total	**27**	**1,864**	**2,410**	**177**	**4,477**
Total purchased	**53**	**3,219**	**5,314**	**2,442**	**11,028**

Clare Valley

Current plantings by variety and year planted

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Franc	13	0	0	0	13	0%
Cabernet Sauvignon	1,105	8	0	0	1,113	0%
Grenache	61	9	4	1	75	1%
Malbec	83	0	0	7	90	8%
Mataro (Mourvedre)	33	0	0	0	33	0%
Merlot	220	0	0	0	220	0%
Montepulciano	1	1	0	0	2	0%
Nero D'Avola	5	2	0	0	7	0%
Petit Verdot	9	0	0	0	9	0%
Pinot Noir	8	0	0	0	8	0%
Sangiovese	34	1	2	9	46	20%
Shiraz	1,939	59	21	8	2,027	0%
Tempranillo	33	0	2	0	35	0%
Other Red	22	0	0	0	22	0%
Total red varieties	**3,566**	**80**	**29**	**25**	**3,700**	**1%**
White winegrapes						
Chardonnay	113	0	0	0	113	0%
Fiano	9	1	4	22	36	61%
Muscat Gordo Blanco	1	1	0	0	2	0%
Pinot Gris	67	0	2	4	73	5%
White winegrapes						
Riesling	1,050	12	7	7	1,076	1%
Sauvignon Blanc	14	0	0	0	14	0%
Semillon	61	0	0	0	61	0%
Traminer (Gewurztraminer)	21	0	0	0	21	0%
Vermentino	5	0	0	0	5	0%
Viognier	10	0	0	0	10	0%
Other White	26	2	3	2	33	6%
Total white varieties	**1,377**	**16**	**16**	**35**	**1,444**	**2%**
Unknown variety	9	0	0	0	9	0%
Rootstock Block	1	0	0	0	1	0%
Total all varieties	**4,953**	**96**	**45**	**60**	**5,154**	**1%**

Source: Vinehealth Australia



SA Winegrape Crush Survey 2023

Regional Summary Report

Coonawarra Wine Region

Wine Australia July 2023

Coonawarra

Vintage overview

VINTAGE REPORT

The 2023 vintage had its challenges, with both viticulturists and winemakers confronted with less than perfect conditions. However, winemakers are optimistic there will be some very good quality wines from the 2023 vintage.

Coonawarra experienced average rainfall through the 2022 winter months and into spring, which was beneficial in recharging the aquifer and ensuring the growing season commenced with full soil moisture profiles.

Increased moisture and cooler conditions on account of a La Niña system meant there were no spring frosts; however, this did result in greater downy mildew pressure. Increased preventative copper sprays, along with additional focus on canopy management, helped to mitigate this disease pressure.

The cool and wet spring transitioned to warm and dry conditions in January, with below-average rainfall and above-average temperatures. The warmer conditions were well-timed for flowering, which occurred in early December rather than the usual November timing. Most varieties flowered within a 2-week period, although timing was everything, with a few windy days causing damage to flowers and yield reductions for some blocks.

The trend returned to cooler, wetter weather patterns from February, which persisted throughout vintage.

Vintage commenced in late March with the white varieties, which had thrived and display refined varietal characteristics and good natural acidity. Cabernet Sauvignon and Shiraz, the major red varieties, were harvested from early-April to mid-May. This was later than usual and resulted in sugar levels lower than the past few years but reminiscent of the great Coonawarra reds from the 1980’s and 1990’s.

Despite the challenges and some losses due to Botrytis infection late in the season, the diligence of vineyard teams paid off with good quality grapes being delivered to wineries.

Coonawarra Vignerons Board (Coonawarra Grape and Wine Incorporated)

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Coonawarra winegrapes was 20,373 tonnes in 2023, 44 per cent below the crush of 36,122 tonnes in 2022 and 43 per cent below the five-year (2018–2022) average crush of 35,899 tonnes.

There was 38 respondents to the survey who reported crushing grapes from Coonawarra in 2023, compared with 48 in 2022.

The total estimated value of Coonawarra winegrapes in 2023 was just over $26 million compared with $41 million in 2022. The lower production was partly offset by a 13 per cent increase in the average purchase value, which increased from $1145 per tonne in 2022 to $1289 per tonne.

The average value of the top three red varieties increased; Cabernet Sauvignon was up by 8 per cent to $1303 per tonne, Shiraz up by 26 per cent to $1500 per tonne and Merlot up by 55 per cent to $1068 per tonne. The average price of Shiraz was $197 (15 per cent) higher than Cabernet Sauvignon, the first time the average value of Shiraz has ever exceeded that of Cabernet Sauvignon by a significant amount in this region. White varieties also increased in average value, with Chardonnay up 17 per cent to $1071 per tonne and Sauvignon Blanc up 3 per cent to $1178 per tonne.

The price dispersion data shows an upward shift in prices paid, with only 8 per cent of grapes purchased at below $600 per tonne, compared with 31 per cent in 2022.

According to Vinehealth Australia data, the total vineyard area in Coonawarra as at 30 April 2023 was 5789 hectares, 42 hectares less than last year, and virtually identical to what it was five years ago.

New plantings in the region have increased marginally from 22 hectares in the 2021–22 season to 28 hectares in 2022–23, of which 21 hectares planted were of Cabernet Sauvignon and the balance being Shiraz.

Coonawarra

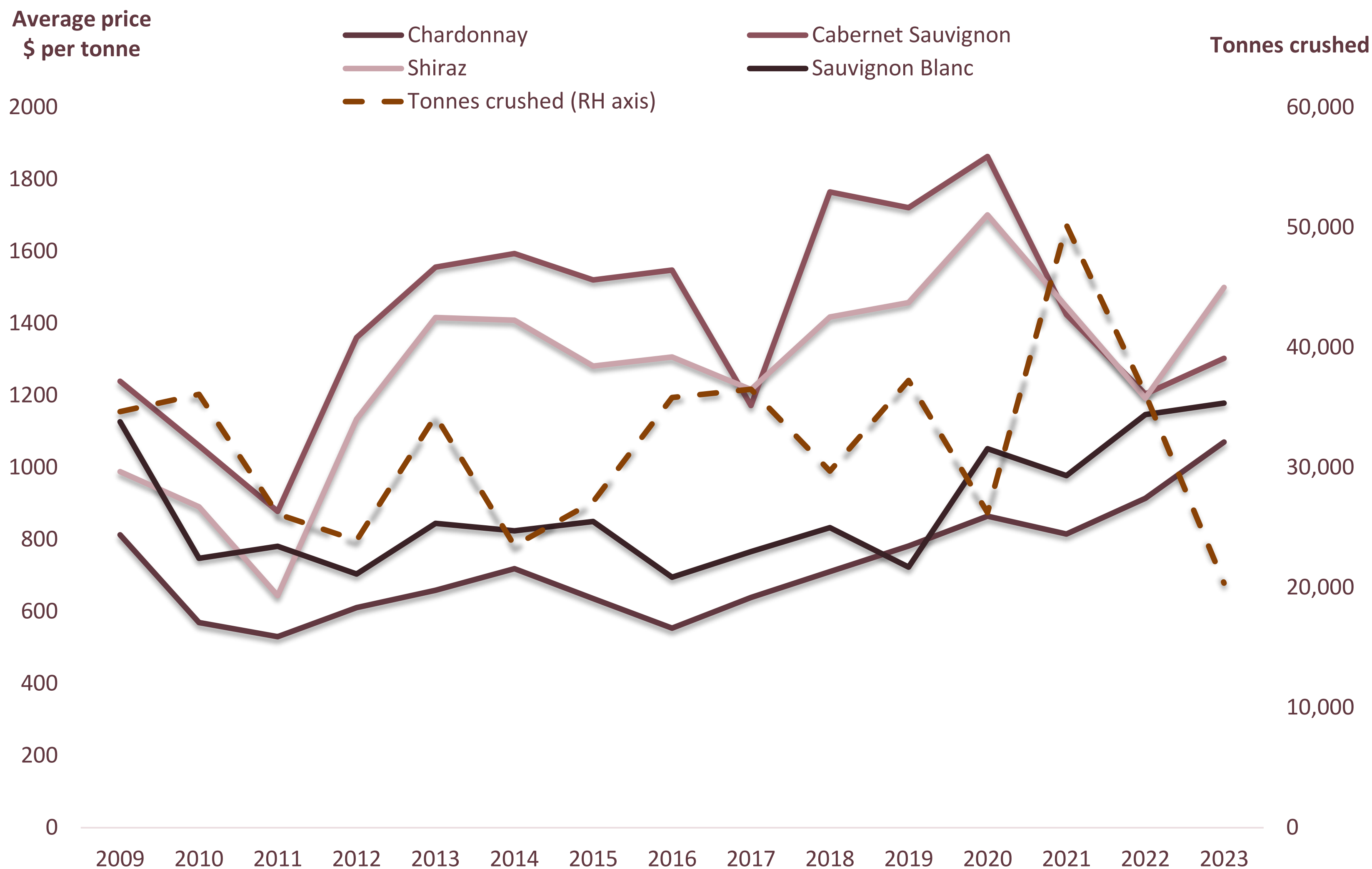
Winegrape intake summary table

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	8				55	88%	63	$70,676
Cabernet Sauvignon	2,172	$2,829,648	$1,303	8%	8,162	79%	10,334	$13,465,538
Malbec	8				21	73%	29	$57,682
Merlot	201	$214,775	$1,068	55%	1,376	87%	1,577	$1,684,912
Petit Verdot	13				190	94%	203	$101,451
Pinot Meunier					5	100%	5	$11,270
Pinot Noir	74	$111,472	$1,505	-4%	184	71%	258	$387,788
Shiraz	756	$1,134,322	$1,500	26%	4,048	84%	4,804	$7,206,002
Tempranillo					10	100%	10	$17,929
Other red	8						8	$16,212
Red Total	**3,239**	**$4,337,141**	**$1,339**	**15%**	**14,051**	**81%**	**17,291**	**$23,019,461**
White								
Chardonnay	541	$579,415	$1,071	17%	933	63%	1,474	$1,578,008
Gewürztraminer					6	100%	6	$6,772
Pinot Gris/Grigio	16				15	47%	31	$30,730
Riesling	27	$27,719	$1,042	0%	294	92%	321	$334,119
Sauvignon Blanc	194	$228,630	$1,178	3%	874	82%	1,069	$1,258,831
Semillon	17				160	91%	177	$106,180
Viognier					0	100%	0	$470
Other white					6	100%	6	$10,208
White Total	**795**	**$861,930**	**$1,085**	**13%**	**2,288**	**74%**	**3,083**	**$3,325,317**
Grand Total	**4,034**	**$5,199,071**	**$1,289**	**13%**	**16,339**	**80%**	**20,373**	**$26,344,778**

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

Coonawarra

Historical weighted average price vs tonnes crushed



Coonawarra

Price dispersion – purchased grapes

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Cabernet Franc			8			8
Cabernet Sauvignon	268	73	1,017	653	160	2,172
Malbec					8	8
Merlot		58	143			201
Petit Verdot	13					13
Pinot Noir		15	20	26	14	74
Shiraz	47	22	384	255	48	756
Other red					8	8
Red Total	**328**	**169**	**1,571**	**935**	**237**	**3,239**
White						
Chardonnay		125	345	71		541
Pinot Gris/Grigio			16			16
Riesling			24	3		27
Sauvignon Blanc			194			194
Semillon		17				17
White Total		**142**	**579**	**74**		**795**
Total purchased	**328**	**311**	**2,151**	**1,008**	**237**	**4,034**

Coonawarra

Current plantings by variety and year planted

	Area (hectares)					
Variety	**Pre-2020**	**2020**	**2021**	**2022**	**Total area (Ha)**	**% planted in 2022**
Red winegrapes						
Cabernet Franc	25	0	0	0	25	0%
Cabernet Sauvignon	3,628	97	20	21	3,766	1%
Malbec	18	0	0	0	18	0%
Merlot	348	1	0	0	349	0%
Meunier	2	0	0	0	2	0%
Petit Verdot	18	0	0	0	18	0%
Pinot Noir	31	0	0	0	31	0%
Shiraz	1,141	0	2	7	1,150	1%
Tempranillo	2	0	0	0	2	0%
Other Red	5	0	0	0	5	0%
Total red varieties	**5,218**	**98**	**22**	**28**	**5,366**	**1%**
White winegrapes						
Chardonnay	246	0	0	0	246	0%
Riesling	45	0	0	0	45	0%
Sauvignon Blanc	87	0	0	0	87	0%
Semillon	11	0	0	0	11	0%
Other White	10	0	0	0	10	0%
Total white varieties	**399**	**0**	**0**	**0**	**399**	**0%**
Unknown variety	24	0	0	0	24	0%
Total all varieties	**5,641**	**98**	**22**	**28**	**5,789**	**0%**

Source: Vinehealth Australia

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Currency Creek Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

Currency Creek Wine Region

Wine Australia July 2023

Currency Creek

Vintage overview

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Currency Creek winegrapes was 3,880 tonnes in 2023, 10 per cent lower than the prior year's crush of 4,294 tonnes and 9 per cent lower than the five-year (2018-2022) average crush of 4,266 tonnes.

It was the second-smallest reported crush since 2007, less than half the record crush of 10,169 tonnes in 2016.

There were 11 respondents to the survey who reported crushing grapes from Currency Creek in 2023, compared with 12 in 2022.

The total estimated value of Currency Creek winegrapes in 2023 was $4.2 million compared with $4.1 million in 2022. The lower production was offset by a 9 per cent increase in the average purchase value of grapes, which increased from $1007 per tonne overall in 2022 to $1097 per tonne.

The average value of the red varieties increased by 27 per cent, with Shiraz up by 41 per cent to $1116 per tonne. White varieties decreased overall by 16 per cent, with Sauvignon Blanc down by 18 per cent to $931 per tonne.

The price dispersion data shows a downward shift in prices paid, with 1 per cent of grapes purchased at above $1500 per tonne, compared with 7 per cent in 2022.

According to Vinehealth Australia data, the total vineyard area in Currency Creek as at 30 April 2023 was 992 hectares, 12 hectares less than last year, and 18 hectares more than the total area five years ago.

There have been virtually no new plantings in the region for the last three years.

Currency Creek

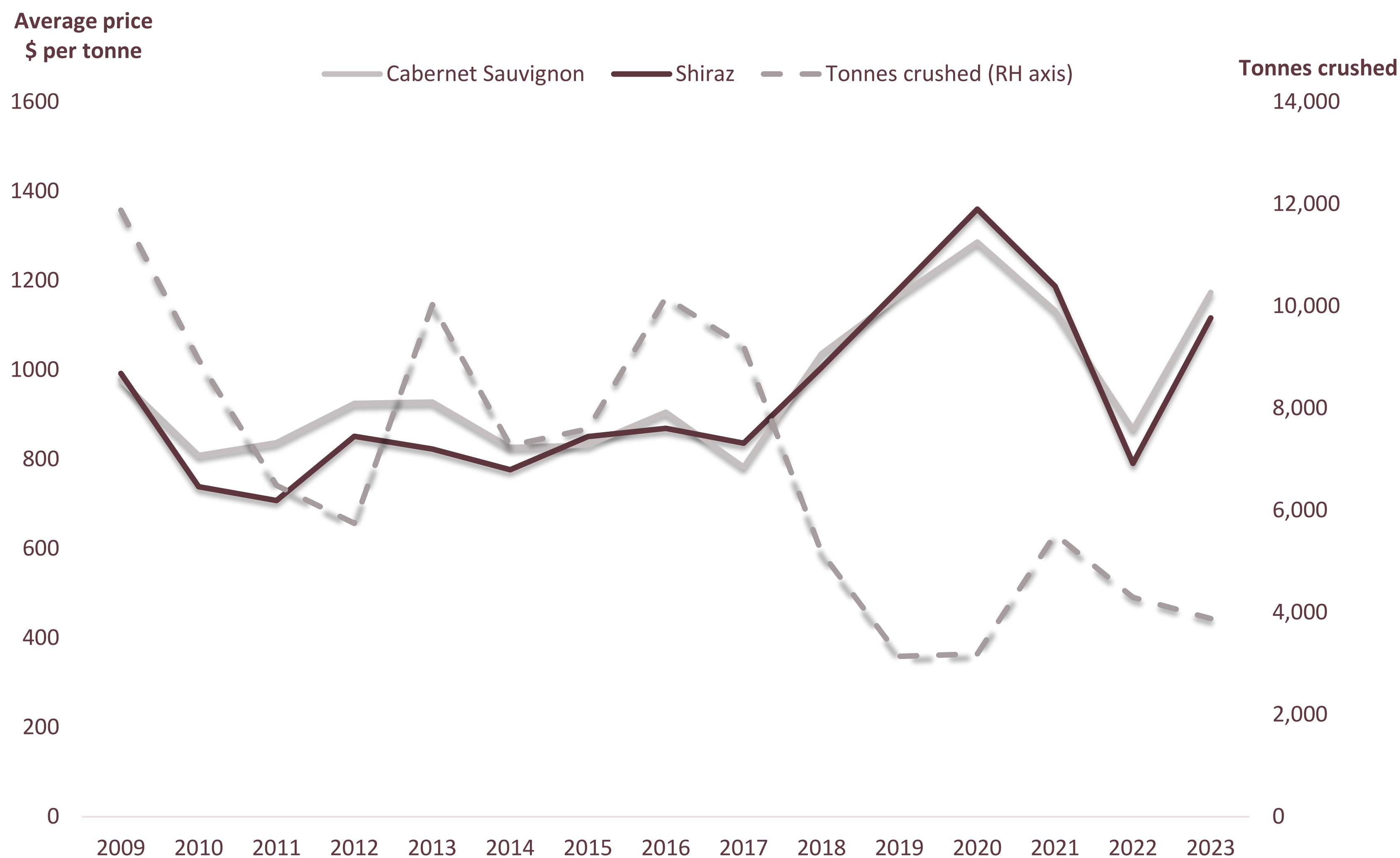
Winegrape intake summary table

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	1,144				79	6%	1,223	$1,435,162
Grenache	32						32	$28,962
Malbec	10				16	61%	27	$36,072
Merlot	338				13	4%	350	$291,937
Petit Verdot	20						20	$24,282
Pinot Noir	34						34	$38,679
Sangiovese	23						23	$35,100
Shiraz	1,044	$1,166,046	$1,116	41%	212	17%	1,256	$1,402,316
Tempranillo	15						15	$22,735
Red Total	**2,661**	**$2,953,629**	**$1,110**	**27%**	**320**	**11%**	**2,981**	**$3,315,245**
White								
Chardonnay	80				284	78%	364	$288,903
Fiano	2						2	$4,000
Gewürztraminer	62						62	$46,785
Pinot Gris/Grigio	221	$278,078	$1,257	-0%			221	$278,078
Roussanne	5						5	$7,028
Sauvignon Blanc	205	$191,062	$931	-18%	16	7%	222	$206,307
Vermentino	19						19	$26,964
Viognier	3						3	$4,950
White Total	**599**	**$622,483**	**$1,040**	**-16%**	**300**	**33%**	**899**	**$863,015**
Grand Total	**3,260**	**$3,576,112**	**$1,097**	**9%**	**620**	**16%**	**3,880**	**$4,178,260**

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

Currency Creek

Historical weighted average price vs tonnes crushed



Currency Creek

Price dispersion – purchased grapes

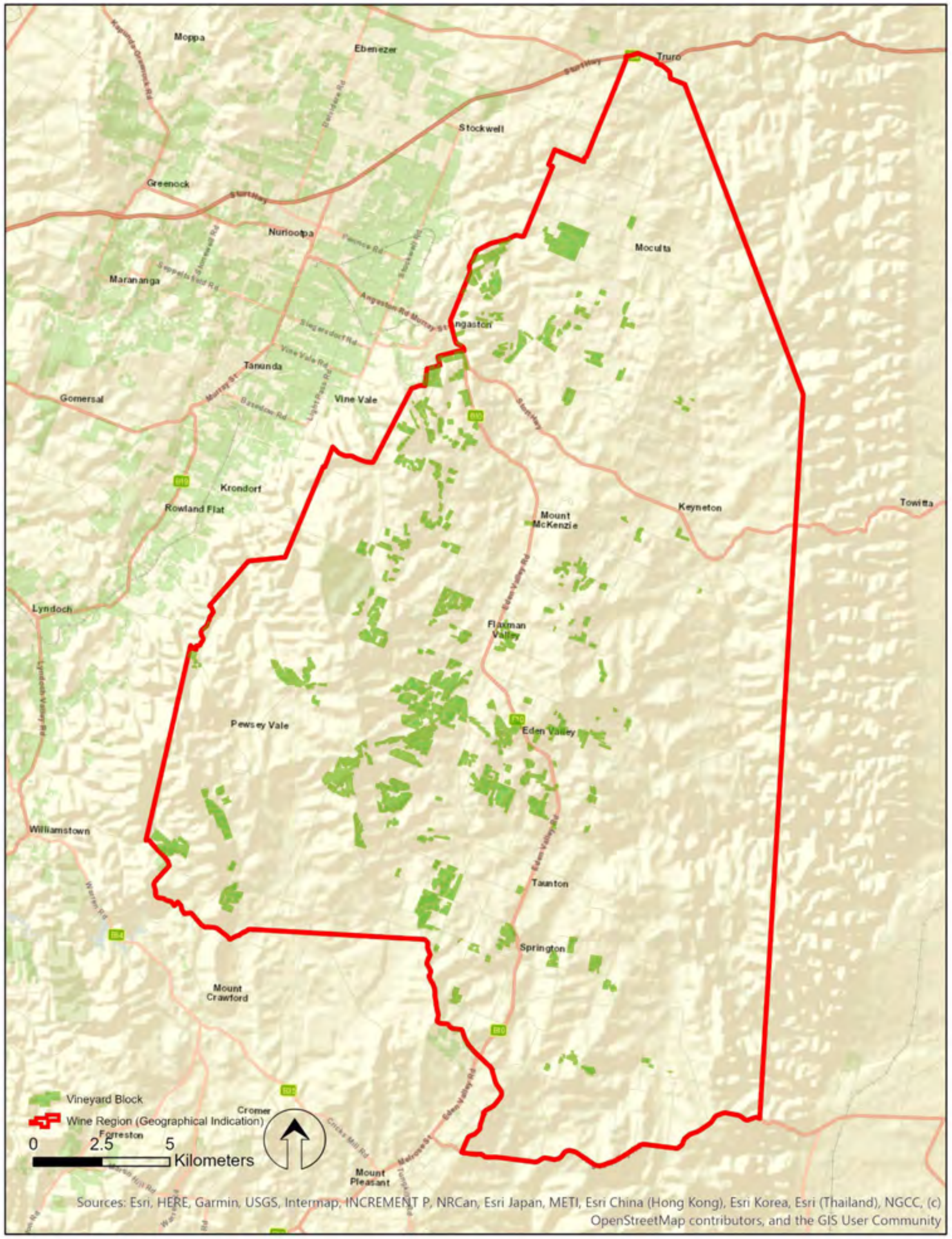
	Tonnes purchased in each segment				
Varieties	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red					
Cabernet Sauvignon		1,144			1,144
Grenache		32			32
Malbec		10			10
Merlot	338				338
Petit Verdot		20			20
Pinot Noir		34			34
Sangiovese			23		23
Shiraz		1,044			1,044
Tempranillo	1		15		15
Red Total	**338**	**2,285**	**38**		**2,661**
White					
Chardonnay	70	10			80
Fiano				2	2
Gewürztraminer	62				62
Pinot Gris/Grigio		221			221
Roussanne		5			5
Sauvignon Blanc	138	67			205
Vermentino		19			19
Viognier			3		3
White Total	**271**	**323**	**3**	**2**	**599**
Total purchased	**609**	**2,608**	**42**	**2**	**3,260**

Currency Creek

Current plantings by variety and year planted

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Sauvignon	288	0	0	0	288	0%
Grenache	11	0	0	0	11	0%
Merlot	57	0	0	0	57	0%
Pinot Noir	12	0	0	0	12	0%
Shiraz	347	0	0	0	347	0%
Other Red	29	0	0	0	29	0%
Total red varieties	**744**	**0**	**0**	**0**	**744**	**0%**
White winegrapes						
Chardonnay	122	0	0	0	122	0%
Pinot Gris	31	0	0	0	31	0%
Riesling	10	0	0	0	10	0%
Sauvignon Blanc	56	0	0	0	56	0%
Semillon	8	0	0	0	8	0%
Viognier	2	0	0	0	2	0%
Other White	10	0	7	0	17	0%
Total white varieties	**239**	**0**	**7**	**0**	**246**	**0%**
Unknown variety	2	0	0	0	2	0%
Total all varieties	**985**	**0**	**7**	**0**	**992**	**0%**

Source: Vinehealth Australia



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Eden Valley Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

Eden Valley Wine Region

Wine Australia July 2023

Eden Valley

Vintage overview

VINTAGE REPORT

Eden Valley vineyards entered the growing season with above average soil moisture, which saw strong budburst across most vineyards.

With a combination of Negative IOD and La Niña climatic patterns, spring rainfall was one of the wettest on record. The constant rain created significant Downy Mildew disease risk and made it difficult to get onto Eden Valley vineyards in some places. However, the majority of growers kept the disease at bay with diligent spray programs.

Happily, the rain caused run-off into most Eden Valley dams this season - for the first time in many years.

Due to reasonably large canopies after the wet spring, followed by a mild start to summer, fruit was harvested 4 to 6 weeks later than the 10-year average (for example, Eden Valley Shiraz, usually harvested in mid-March, was picked from mid-April to early May).

2023 yields varied across the region. Due to the cool conditions during flowering (September and October were cooler than average) fruit-set was sub-optimal in some areas.

Nicki Robins, Viticultural Development Manager

Barossa Australia

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Eden Valley winegrapes was 7129 tonnes in 2023, an increase of 4 per cent compared with the 2022 vintage. Over the past five years (up to 2022), the average crush for Eden Valley has been 7453 tonnes, making this year's crush 4 per cent below the five-year average.

There were 44 respondents to the survey who reported crushing grapes from Eden Valley in 2023, compared with 39 in 2022.

The total estimated value of winegrapes in 2023 increased by 7 per cent from $14 million to $15 million, as a result of increased production combined with a small overall increase in the average purchase value of grapes, which increased by 4 per cent from $2085 to $2163 per tonne.

The average value for Shiraz, the largest red variety, stayed the same at $2646 per tonne whereas Cabernet Sauvignon was down by 3 per cent to $2200 per tonne. Pinot Noir increased by 9 per cent to $1690 per tonne. The average value for whites increased by 5 per cent overall; Riesling was up 3 per cent to $1999 per tonne and Chardonnay was up 9 per cent to $1745 per tonne.

The price dispersion also showed an upward shift, with 52 per cent of all varieties purchased at $2000 and above, compared with 43 per cent in 2022.

According to Vinehealth Australia data, there were 4 hectares of new vines planted in the 2022–2023 season, compared with 18 hectares in the 2021-22 season. Of the new plantings, 2 hectares were Grenache, which resulted in a 7 per cent increase in the total area of this variety.

The total vineyard area in Eden Valley as at 30 April 2023 was 2299 hectares, approximately 36 hectares less than it was five years ago.

Eden Valley

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	6				20	78%	26	$67,088
Cabernet Sauvignon	183	$402,158	$2,200	-3%	484	73%	667	$1,467,976
Graciano					2	100%	2	$2,983
Grenache	20	$62,050	$3,105	-13%			20	$62,050
Lagrein					2	100%	2	$3,042
Malbec					1	100%	1	$1,498
Mataro/Mourvedre	7				36	85%	43	$113,008
Merlot	37	$40,648	$1,088	-19%	109	74%	147	$159,370
Montepulciano	5				2	27%	7	$13,400
Petit Verdot					7	100%	7	$11,140
Pinot Noir	119	$201,280	$1,690	9%	63	35%	182	$307,693
Shiraz	1,514	$3,996,024	$2,646	0%	921	38%	2,434	$6,432,050
Tempranillo	33				10	24%	43	$127,833
Other red	5				4	42%	9	$12,494
Red Total	**1,929**	**$4,848,035**	**$2,519**	**1%**	**1,661**	**46%**	**3,590**	**$8,781,625**
White								
Chardonnay	392	$684,952	$1,745	9%	447	53%	840	$1,465,825
Gewürztraminer	15				6	29%	21	$20,863
Grüner Veltliner					6	100%	6	$12,026
Muscat à Petits Grains Blancs	10				1	12%	12	$10,849
Pinot Gris/Grigio	87	$124,546	$1,438	4%	111	56%	198	$284,529
Riesling	957	$1,912,723	$1,999	3%	906	49%	1,863	$3,724,907
Roussanne	30				4	13%	34	$81,792
Sauvignon Blanc	57	$64,784	$1,143	10%	61	52%	118	$134,669
Semillon	133	$101,312	$764	-2%	32	20%	165	$126,032
Viognier	149	$281,792	$1,890	-14%	84	36%	233	$441,068
Other white	19				31	62%	50	$116,029
White Total	**1,848**	**$3,310,257**	**$1,791**	**5%**	**1,692**	**48%**	**3,539**	**$6,418,589**
Grand Total	**3,776**	**$8,158,292**	**$2,163**	**4%**	**3,353**	**47%**	**7,129**	**$15,200,216**

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

Eden Valley

Price dispersion – purchased grapes

	Tonnes purchased in each segment				
Varieties	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red					
Cabernet Franc				6	6
Cabernet Sauvignon		6	90	87	183
Grenache			1	19	20
Mataro/Mourvedre				7	7
Merlot	13	23		1	37
Montepulciano				5	5
Pinot Noir		47	18	54	119
Shiraz	21	163	318	1,012	1,514
Tempranillo				33	33
Other red		5			5
Red Total	**34**	**244**	**428**	**1,223**	**1,929**
White					
Chardonnay	3	3	327	59	392
Gewürztraminer		15			15
Muscat à Petits Grains Blancs	7	4			10
Pinot Gris/Grigio		50	36	1	87
Riesling	9		383	565	957
Roussanne				30	30
Sauvignon Blanc		53	3		57
Semillon	122	9	2		133
Viognier		33	33	83	149
Other white		1		18	19
White Total	**140**	**167**	**785**	**756**	**1,848**
Total purchased	**174**	**411**	**1,212**	**1,978**	**3,776**

Eden Valley

Current plantings by variety and year planted

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	335	1	0	0	336	0%
Grenache	22	0	5	2	29	7%
Mataro (Mourvedre)	16	0	0	0	16	0%
Merlot	50	0	0	0	50	0%
Montepulciano	3	0	0	0	3	0%
Petit Verdot	7	0	0	0	7	0%
Pinot Noir	54	0	0	0	54	0%
Shiraz	810	8	2	0	820	0%
Tempranillo	12	0	2	0	14	0%
Other Red	13	0	1	0	14	0%
Total red varieties	**1,328**	**9**	**10**	**2**	**1,349**	**0%**
White winegrapes						
Chardonnay	240	0	0	0	240	0%
Muscat A Petit Grains Blanc (White Frontignac)	6	0	0	0	6	0%
Pinot Gris	35	3	2	0	40	0%
Riesling	521	0	4	1	526	0%
Sauvignon Blanc	37	0	0	0	37	0%
Semillon	15	0	0	0	15	0%
Traminer (Gewurztraminer)	14	0	0	0	14	0%
Viognier	33	0	0	0	33	0%
Other White	21	0	0	1	22	5%
Total white varieties	**922**	**3**	**6**	**2**	**933**	**0%**
Unknown variety	17	0	0	0	17	0%
Total all varieties	**2,267**	**12**	**16**	**4**	**2,299**	**0%**

Source: Vinehealth Australia

SA Winegrape Crush Survey 2023

Regional Summary Report

Fleurieu zone - other

Wine Australia July 2023

Fleurieu zone - other

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								
Malbec	12						12	$12,460
Shiraz	144	$122,304	$849	-2%			144	$122,304
Red Total	**156**	**$134,764**	**$861**	**-6%**			**156**	**$134,764**
White								
Chardonnay	242	$154,836	$641	-2%			242	$154,836
Pinot Gris/Grigio	127						127	$122,228
Prosecco	15						15	$13,314
Riesling	33						33	$28,271
Sauvignon Blanc	123						123	$135,641
White Total	**540**	**$454,290**	**$841**	**5%**			**540**	**$454,290**
Grand Total	**696**	**$589,054**	**$846**	**-1%**			**696**	**$589,054**

There were 8 respondents to the survey who reported crushing grapes from Fleurieu Zone – other in 2023, compared with 10 in 2022.

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

Fleurieu zone - other

Price dispersion – purchased grapes

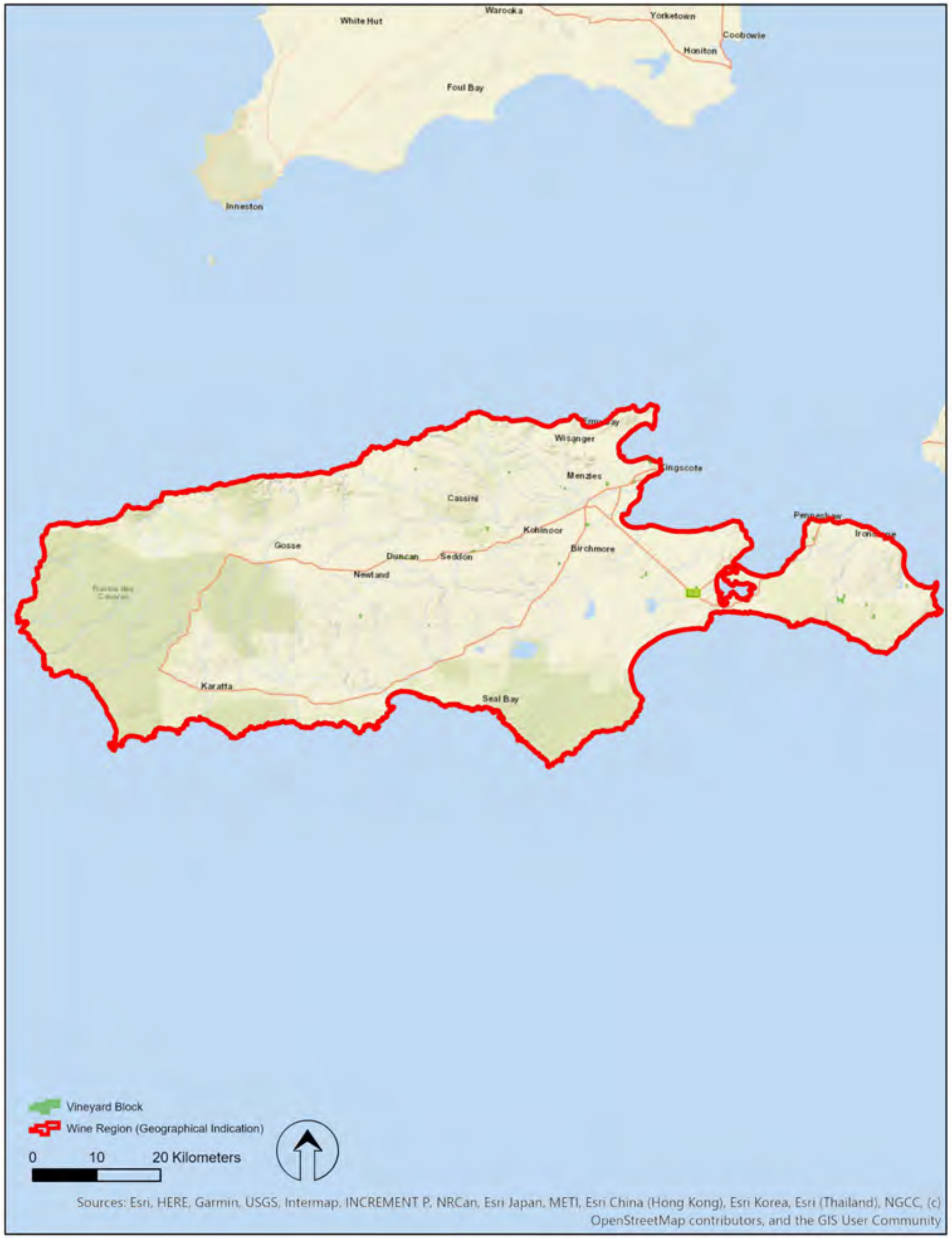
	Tonnes purchased in each segment				
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**>$2000**	**Total purchased**
Red					
Malbec			12		12
Shiraz	97		40	8	144
Red Total	**97**		**52**	**8**	**156**
White					
Chardonnay		242			242
Pinot Gris/Grigio			127		127
Prosecco		11	4		15
Riesling		33			33
Sauvignon Blanc			123		123
White Total		**286**	**255**		**540**
Total purchased	**97**	**286**	**307**	**8**	**696**

Fleurieu zone - other

Current plantings by variety and year planted

	Area (hectares)					
Variety	**Pre-2020**	**2020**	**2021**	**2022**	**Total area (Ha)**	**% planted in 2022**
Red winegrapes						
Cabernet Sauvignon	20	0	0	0	20	0%
Grenache	1	0	0	0	1	0%
Shiraz	67	0	0	0	67	0%
Other Red	3	0	0	0	3	0%
Total red varieties	**91**	**0**	**0**	**0**	**91**	**0%**
White winegrapes						
Chardonnay	29	0	0	0	29	0%
Pinot Gris	16	0	0	0	16	0%
Riesling	2	0	0	0	2	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	4	0	0	0	4	0%
Total white varieties	**64**	**0**	**0**	**0**	**64**	**0%**
Unknown variety	1	0	0	0	1	0%
Total all varieties	**156**	**0**	**0**	**0**	**156**	**0%**

Source: Vinehealth Australia



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Kangaroo Island
Wine Region

VINEHEALTH AUSTRALIA

SA Winegrape Crush Survey 2023

Regional Summary Report

Kangaroo Island Wine Region

Wine Australia July 2023

Kangaroo Island

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					27	100%	27	$38,561
Malbec					0	100%	0	$618
Merlot					9	100%	9	$8,803
Montepulciano					4	100%	4	$8,982
Pinot Noir					5	100%	5	$10,849
Shiraz					39	100%	39	$61,658
Red Total					**85**	**100%**	**85**	**$129,471**
White								
Chardonnay					8	100%	8	$11,264
Pinot Gris/Grigio					18	100%	18	$24,973
Roussanne					1	100%	1	$2,178
Sauvignon Blanc					10	100%	10	$14,773
Other white					3	100%	3	$4,310
White Total					**40**	**100%**	**40**	**$57,498**
Grand Total					**124**	**100%**	**124**	**$186,969**

There were 4 respondents to the survey who reported crushing grapes from Kangaroo Island in 2023, compared with 6 in 2022.

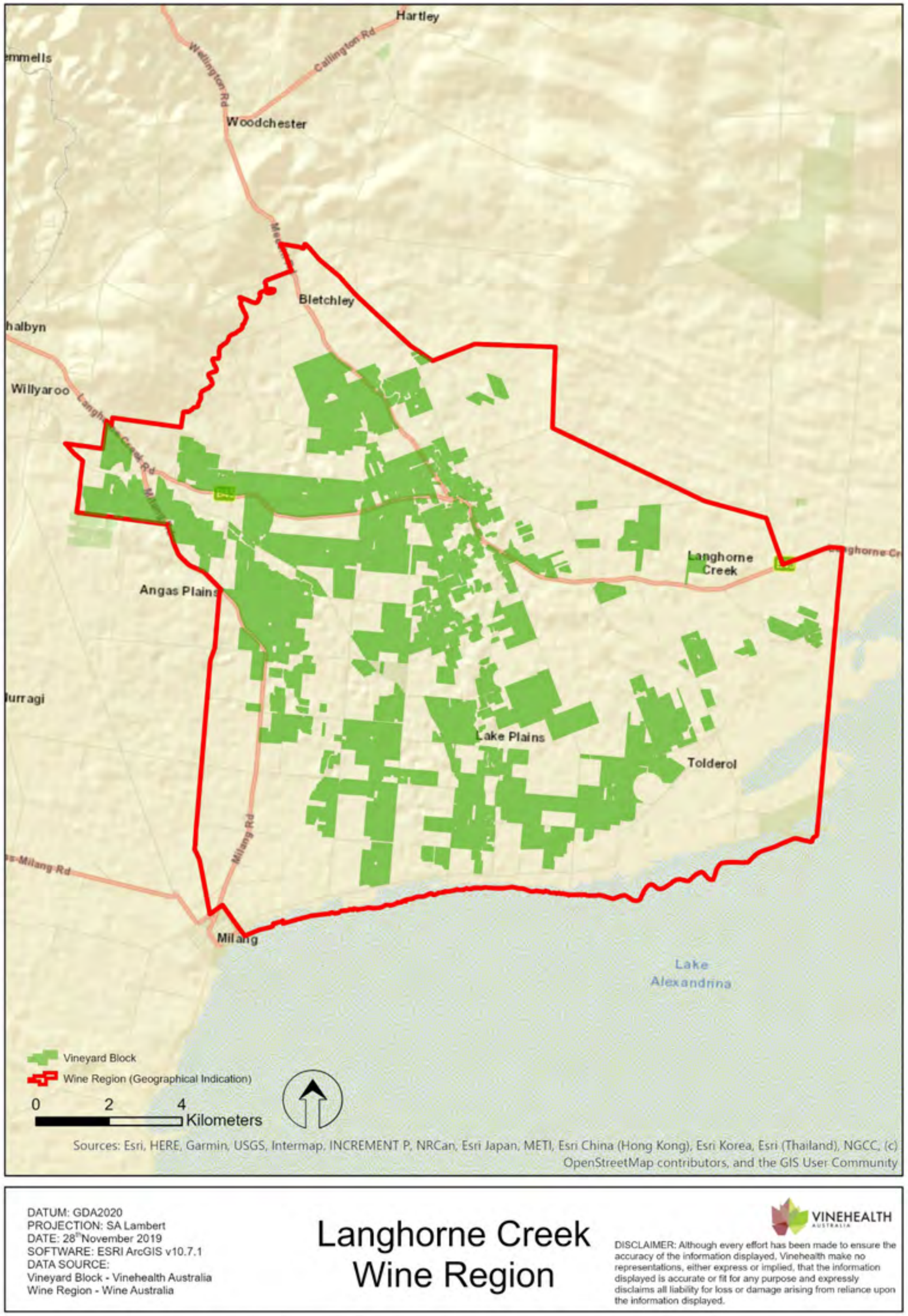
Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Kangaroo Island

Current plantings by variety and year planted

Area (hectares)						
Variety	**Pre-2020**	**2020**	**2021**	**2022**	**Total area (Ha)**	**% planted in 2022**
Red winegrapes						
Cabernet Franc	4	0	0	0	4	0%
Cabernet Sauvignon	43	0	0	0	43	0%
Grenache	1	0	0	0	1	0%
Malbec	4	0	0	0	4	0%
Merlot	4	0	0	0	4	0%
Pinot Noir	1	0	0	0	1	0%
Shiraz	44	0	0	0	44	0%
Other Red	4	0	0	0	4	0%
Total red varieties	**105**	**0**	**0**	**0**	**105**	**0%**
White winegrapes						
Chardonnay	9	0	0	0	9	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	2	0	0	0	2	0%
Sauvignon Blanc	9	0	0	0	9	0%
Semillon	1	0	0	0	1	0%
Other White	3	0	0	1	4	25%
Total white varieties	**25**	**0**	**0**	**1**	**26**	**4%**
Unknown variety	15	0	0	0	15	0%
Total all varieties	**145**	**0**	**0**	**1**	**146**	**1%**

Source: Vinehealth Australia



SA Winegrape Crush Survey 2023

Regional Summary Report

Langhorne Creek Wine Region

Wine Australia July 2023

Langhorne Creek

Vintage overview

VINTAGE REPORT

It was a late, long, and tough vintage all round in 2023, but patience paid off and wines will shine from the Langhorne Creek 2023 vintage.

The growing season began on a foundation of above-average winter rainfall during June and July 2022, with a small measure of flooding in a few locations on the natural floodplain vineyards. During flowering the October rainfall tripled its monthly average and November rainfall was higher again than average for this time of year in the region.

A short flowering period was challenged by cold winds and rain during spring and some early flowering varieties were negatively impacted. Generally, fruit set in the region's key varieties, Shiraz, and Cabernet Sauvignon, was even but average to below-average in yield.

The harvest of white varieties started around two weeks later than usual in mid-February, with local reds following at least three weeks later around mid- March. The bulk of the region's fruit that was destined for harvest was taken in by mid to late April, and final loads moved out in the first week of May.

It is no secret that the 2023 vintage held significant challenges, not only from seasonal climatic conditions, but also market and supply/demand pressures across the industry which resulted in substantial quantities of red grapes, particularly Shiraz and Cabernet Sauvignon, not being taken this year. The good news lies in the quality of the fruit taken, with standout varieties from this year in Langhorne Creek being beautiful Cabernet Sauvignon and Grenache with some excellent Malbec and great parcels of Shiraz.

Lian Jaensch – Langhorne Creek Grape and Wine Incorporated – with thanks for additional input to Paul Hotker (Bleasdale Vineyards) and Rebecca Willson (Bremerton)

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Langhorne Creek was 26,653 tonnes in 2023, a reduction of 27 per cent compared with the 2022 vintage. Over the past five years (up to 2022), the average crush for Langhorne Creek has been 40,407 tonnes, making this year's crush 34 per cent below the five-year average. It was the fifth-lowest reported crush since 1998.

There were 49 respondents to the survey who reported crushing grapes from Langhorne Creek in 2023, compared to 51 in 2022.

The total estimated value of winegrapes from Langhorne Creek in 2023 was $22.9 million compared with $30.6 million in 2022, a decrease of 25 per cent. The average purchase value of grapes increased by 1 per cent overall from $842 per tonne in 2022 to $852 per tonne.

The top red variety, Shiraz, was down by 3 per cent to $899 per tonne whereas Cabernet Sauvignon was up by 2 per cent to $803 per tonne. White varieties fared slightly better overall: Chardonnay was down by 1 per cent to $666, Sauvignon Blanc increased by 19 per cent to $1069 per tonne and Pinot Gris/Grigio increased by 10 per cent to $1066 per tonne. The average value for Pinot Gris/Grigio has stayed higher than Shiraz and Cabernet Sauvignon for the second year in a row.

The price dispersion data shows a slight upward shift in prices, with 44 per cent of grapes purchased at more than $900 per tonne compared with 39 per cent in 2022.

According to Vinehealth Australia data, the total vineyard area in Langhorne Creek as at 30 April 2023 is 5884 hectares, compared with 5972 hectares in 2022. The total area is around 52 hectares less than it was 5 years ago.

There were just 4 hectares of new plantings in Langhorne Creek in the 2022-23 planting season, of which 3 hectares were Cabernet Sauvignon.

Langhorne Creek

Winegrape intake summary table – red winegrapes

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	7						7	$7,476
Cabernet Franc	5				3	41%	8	$8,902
Cabernet Sauvignon	5,337	$4,285,313	$803	2%	1,592	23%	6,929	$5,563,268
Durif	220						220	$33,027
Graciano					7	100%	7	$12,916
Grenache	149	$149,627	$1,004	-2%	653	81%	802	$805,870
Lagrein	22						22	$26,348
Malbec	484	$564,648	$1,167	-5%	115	19%	599	$698,357
Mataro/Mourvedre	36				4	11%	41	$25,828
Merlot	1,351	$754,693	$559	-11%	461	25%	1,812	$1,011,966
Montepulciano	17	$38,578	$2,276	0%	11	39%	28	$62,781
Nebbiolo					1	100%	1	$1,426
Nero d'Avola	4				2	38%	6	$10,657
Petit Verdot	23	$19,459	$847	0%	18	43%	41	$34,437
Pinot Meunier	50						50	$49,820
Pinot Noir	590	$857,109	$1,452	34%	323	35%	913	$1,325,783
Sangiovese	114	$152,366	$1,341	2%	10	8%	123	$165,224
Shiraz	7,057	$6,342,365	$899	-3%	2,415	26%	9,472	$8,513,252
Tempranillo	30	$46,694	$1,538	42%	2	6%	32	$49,770
Touriga Nacional	14						14	$24,842
Other red	56	$36,500	$649	-30%	7	11%	63	$49,187
Red Total	**15,565**	**$13,423,844**	**$862**	**-0%**	**5,623**	**27%**	**21,188**	**$18,481,137**

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

Langhorne Creek

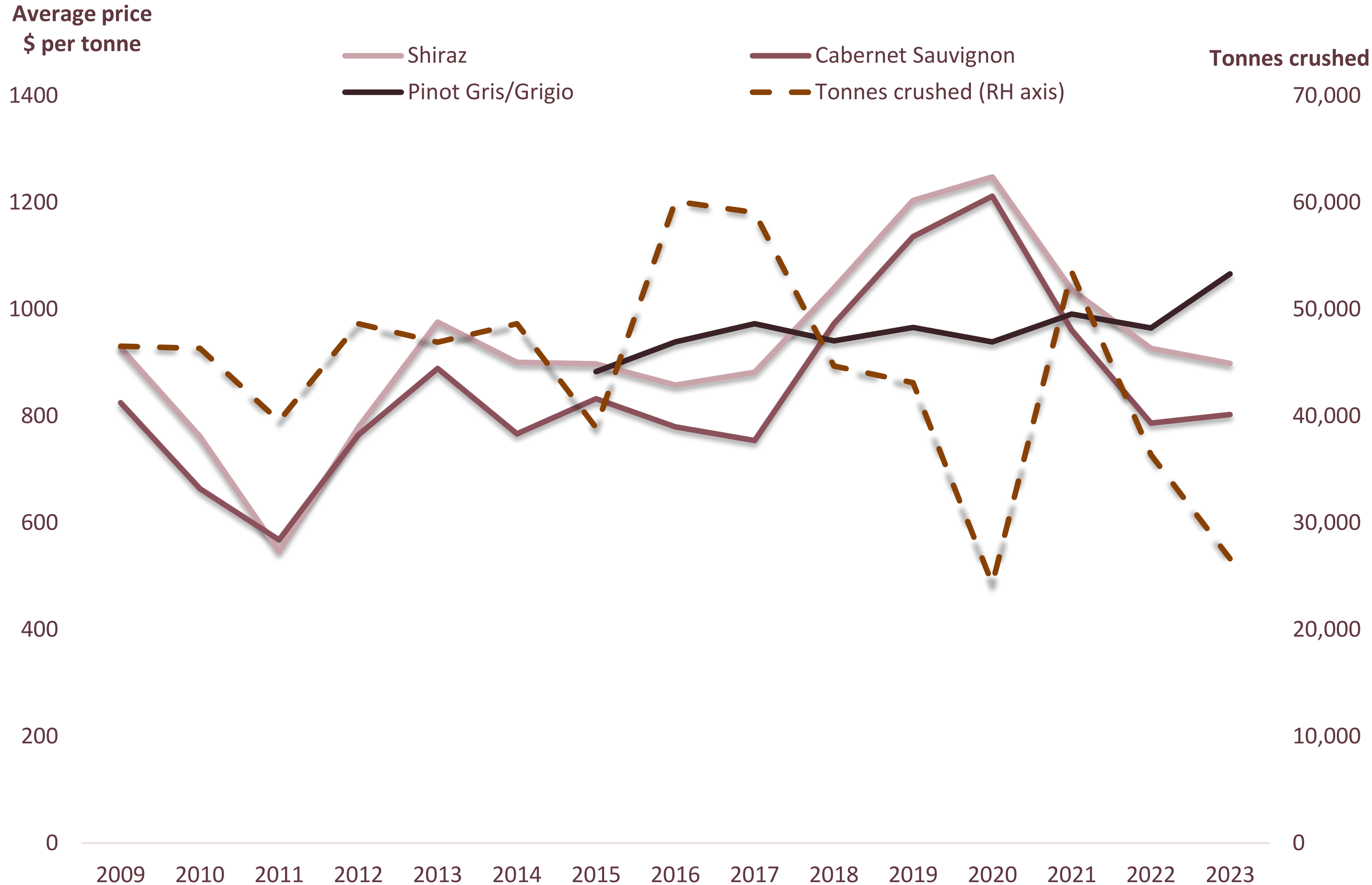
Winegrape intake summary table – white winegrapes

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	1,817	$1,210,714	$666	-1%	411	18%	2,228	$1,484,238
Chenin blanc					4	100%	4	$5,390
Fiano	20	$35,135	$1,781	-2%	6	22%	25	$45,047
Marsanne					0	100%	0	$517
Muscat à Petits Grains Blancs					11	100%	11	$12,679
Pinot Gris/Grigio	317	$337,862	$1,066	10%	137	30%	454	$483,611
Prosecco	4						4	$7,215
Riesling	71				1,787	96%	1,857	$1,485,912
Sauvignon Blanc	424	$453,278	$1,069	19%	307	42%	731	$780,909
Verdelho					71	100%	71	$85,238
Vermentino	45	$48,286	$1,082	0%	11	20%	56	$60,366
Viognier	24						24	$15,483
Other white					1	100%	1	$2,027
White Total	**2,721**	**$2,164,645**	**$796**	**8%**	**2,744**	**50%**	**5,465**	**$4,468,631**
Grand Total	**18,286**	**$15,588,489**	**$852**	**1%**	**8,367**	**31%**	**26,653**	**$22,949,768**

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

Langhorne Creek

Historical weighted average price vs tonnes crushed



Langhorne Creek

Price dispersion – purchased grapes

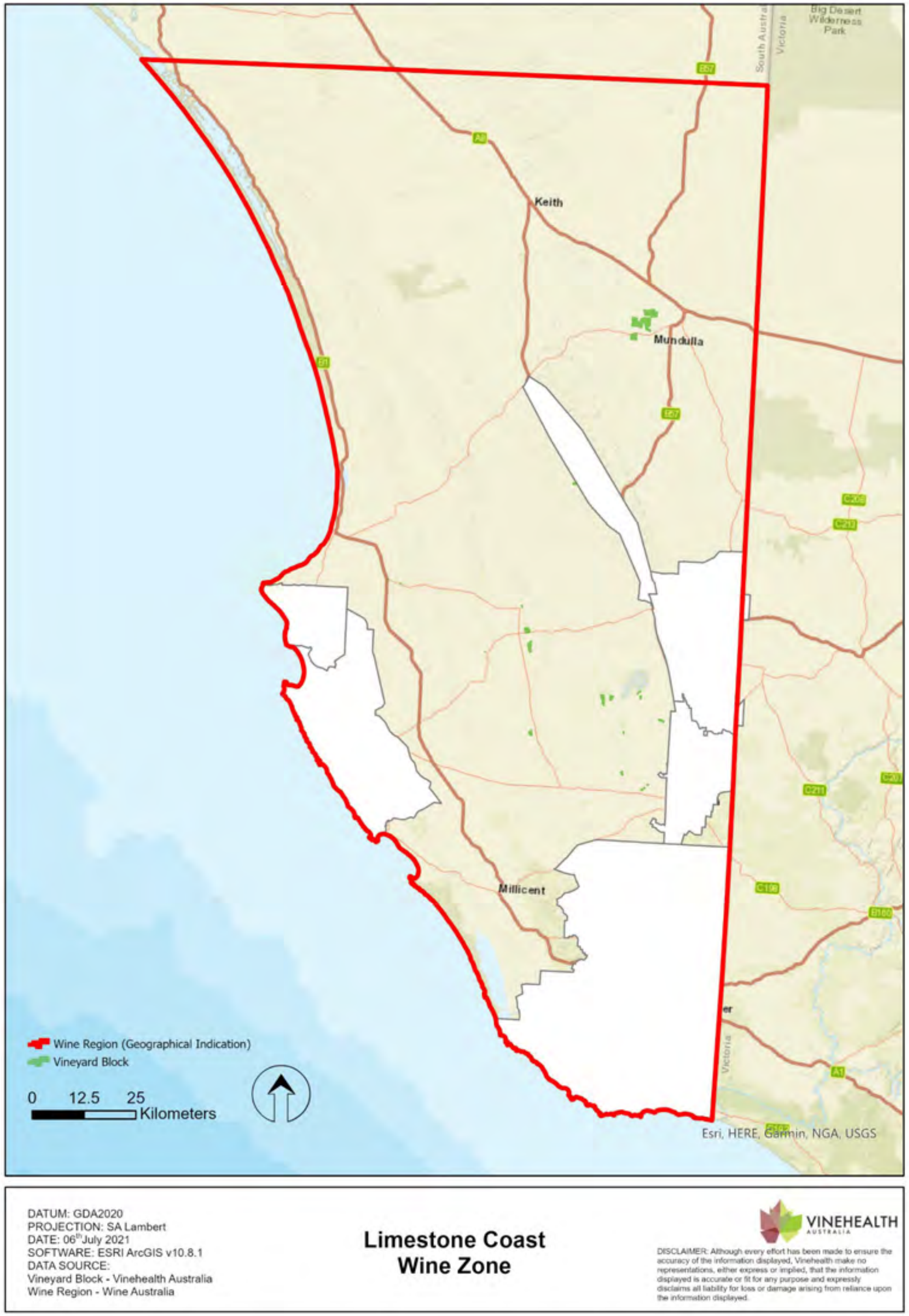
	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Barbera			7			7
Cabernet Franc			5			5
Cabernet Sauvignon	1,309	1,449	2,396	21	54	5,228
Durif	220					220
Grenache		6	141		2	149
Lagrein			22			22
Malbec	1	54	305	124		484
Mataro/Mourvedre		34	2			36
Merlot	694	617	40			1,351
Montepulciano					17	17
Nero d'Avola				4		4
Petit Verdot		19	4			23
Pinot Meunier			50			50
Pinot Noir			269	321		590
Sangiovese			104	10		114
Shiraz	1,420	2,305	3,120	140	71	7,057
Tempranillo			6	24		30
Touriga Nacional				14		14
Other red	24	16	16			56
Red Total	**3,668**	**4,501**	**6,486**	**658**	**144**	**15,456**
White						
Chardonnay	202	1,615				1,817
Fiano				14	6	20
Pinot Gris/Grigio			299	18		317
Prosecco				4		4
Riesling		71				71
Sauvignon Blanc		31	394			424
Vermentino			45			45
Viognier		24				24
White Total	**202**	**1,741**	**737**	**35**	**6**	**2,721**
Total purchased	**3,869**	**6,241**	**7,223**	**693**	**150**	**18,177**

Langhorne Creek

Current plantings by variety and year planted

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Franc	9	0	0	0	9	0%
Cabernet Sauvignon	1,940	11	5	3	1,959	0%
Dolcetto	8	0	0	0	8	0%
Grenache	78	0	0	0	78	0%
Lagrein	10	0	0	0	10	0%
Malbec	101	0	4	0	105	0%
Mataro	8	0	0	0	8	0%
Merlot	375	1	0	0	376	0%
Nero D'Avola	0	0	0	1	1	100%
Petit Verdot	10	0	0	0	10	0%
Pinot Noir	101	0	2	0	103	0%
Sangiovese	15	0	0	0	15	0%
Shiraz	2,276	36	3	0	2,315	0%
Tempranillo	5	0	0	0	5	0%
Zinfandel	7	0	0	0	7	0%
Other Red	31	0	0	0	31	0%
Total red varieties	**4,974**	**48**	**14**	**4**	**5,040**	**0%**
White winegrapes						
Chardonnay	458	0	0	0	458	0%
Fiano	7	0	0	0	7	0%
Pinot Gris	50	0	0	0	50	0%
Riesling	160	0	0	0	160	0%
Sauvignon Blanc	75	0	0	0	75	0%
Semillon	1	0	0	0	1	0%
Verdelho	8	0	0	0	8	0%
Other White	29	0	0	0	29	0%
Total white varieties	**788**	**0**	**0**	**0**	**788**	**0%**
Unknown variety	50	0	0	0	50	0%
Rootstock Block	6	0	0	0	6	0%
Total all varieties	**5,818**	**48**	**14**	**4**	**5,884**	**0%**

Source: Vinehealth Australia



SA Winegrape Crush Survey 2023

Regional Summary Report

Limestone Coast zone - other

Wine Australia July 2023

Limestone Coast zone - other

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	81				3	4%	85	$104,102
Cabernet Sauvignon	490	$505,320	$1,032	49%	550	53%	1,039	$1,072,632
Malbec	103						103	$121,660
Mataro/Mourvedre	207						207	$165,912
Merlot	590				498	46%	1,088	$926,840
Montepulciano	6						6	$9,735
Nebbiolo					2	100%	2	$5,246
Petit Verdot	3				6	67%	9	$16,272
Pinot Noir	97	$163,199	$1,690	11%	33	25%	129	$218,218
Shiraz	1,168	$1,363,004	$1,167	42%	18	1%	1,185	$1,383,758
Tempranillo	3				10	78%	13	$18,466
Other red	58	$61,938	$1,062	17%			58	$61,938
Red Total	**2,805**	**$3,002,473**	**$1,070**	**37%**	**1,120**	**29%**	**3,925**	**$4,104,779**
White								
Chardonnay	416	$352,713	$849	2%	459	52%	875	$742,378
Muscat à Petits Grains Blancs	9						9	$4,725
Pinot Gris/Grigio	90	$96,442	$1,069	6%			90	$96,442
Prosecco	16						16	$22,194
Sauvignon Blanc	20						20	$22,624
Semillon	23						23	$17,588
Verdelho	10						10	$5,055
White Total	**585**	**$521,340**	**$891**	**-3%**	**459**	**44%**	**1,044**	**$911,005**
Grand Total	**3,390**	**$3,523,813**	**$1,039**	**30%**	**1,579**	**32%**	**4,969**	**$5,015,784**

There were 13 respondents to the survey who reported crushing grapes from Limestone Coast zone – other in 2023, compared with 16 in 2022.

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

Limestone Coast zone - other

Price dispersion – purchased grapes

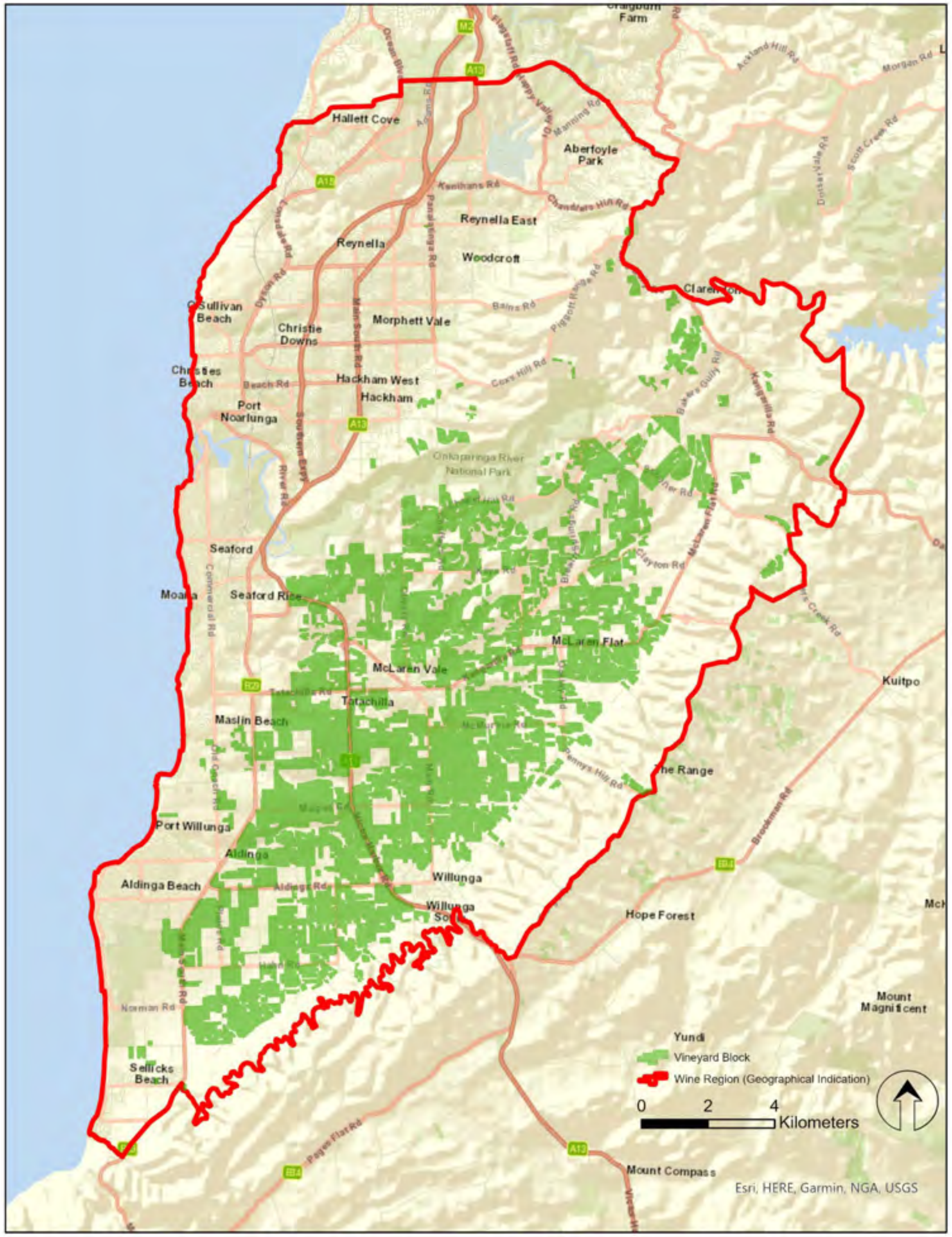
	Tonnes purchased in each segment				
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**Total purchased**
Red					
Cabernet Franc			81		81
Cabernet Sauvignon	103	53	333		490
Malbec			103		103
Mataro/Mourvedre		207			207
Merlot		590			590
Montepulciano				6	6
Petit Verdot				3	3
Pinot Noir		18		79	97
Shiraz	132	103	933		1,168
Tempranillo			3		3
Other red		15	44		58
Red Total	**235**	**985**	**1,496**	**88**	**2,805**
White					
Chardonnay		298	118		416
Muscat à Petits Grains Blancs	9				9
Pinot Gris/Grigio			81	10	90
Prosecco			16		16
Sauvignon Blanc			20		20
Semillon		23			23
Verdelho	10				10
White Total	**20**	**321**	**235**	**10**	**585**
Total purchased	**255**	**1,306**	**1,731**	**98**	**3,390**

Limestone Coast zone - other

Current plantings by variety and year planted

Variety	Area (hectares) Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Franc	31	0	0	0	31	0%
Cabernet Sauvignon	707	0	0	0	707	0%
Malbec	21	0	2	0	23	0%
Merlot	259	0	0	0	259	0%
Petit Verdot	41	0	0	0	41	0%
Pinot Noir	11	0	0	0	11	0%
Shiraz	463	3	0	5	471	1%
Other Red	60	0	0	0	60	0%
Total red varieties	**1,593**	**3**	**2**	**5**	**1,603**	**0%**
White winegrapes						
Chardonnay	120	0	0	0	120	0%
Pinot Gris	13	0	0	0	13	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	17	0	0	0	17	0%
Semillon	3	0	0	0	3	0%
Other White	11	0	0	0	11	0%
Total white varieties	**168**	**0**	**0**	**0**	**168**	**0%**
Total all varieties	**1,761**	**3**	**2**	**5**	**1,771**	**0%**

Source: Vinehealth Australia



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 15th February 2023
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

McLaren Vale Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2023

McLaren Vale

Vintage overview

VINTAGE REPORT

The McLaren Vale wine region experienced good winter rains filling the soil profile in readiness for spring. Continued wet and cold conditions throughout spring delayed budburst and resulted in slower shoot growth. Spring rainfall was higher than the McLaren Vale winter average. Multiple rain events during spring resulted in increased disease pressure and inflorescence loss, some varieties being more affected than others.

Flowering occurred in late November and weather was mostly cool, wet, windy and cloudy adversely impacting on fruit set in across the region. With the advent of summer, rainfall stopped abruptly and conditions for December, January and February were dry and mild with only a few days above 40ºC.

The combination of late flowering and cool summer conditions resulted in a late harvest period. Once again cool wet autumn conditions combined to further slow ripening and prolong vintage.

In summary, vintage 2023 was cool and wet, harvest was later than usual, and yields were well below average. Whilst this has been a challenging season for grapegrowers and winemakers alike it has allowed their skills to shine, and we expect to see elegant wines that express terroir.

Jodie Armstrong, for McLaren Vale Grape, Wine and Tourism Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from McLaren Vale was 26,467 tonnes in 2023, 24 per cent below the 2022 reported crush of 34,990 tonnes and 22 per cent below the five-year average (2018–2022) of 34,037 tonnes. It was the lowest crush recorded for the region since the first SA Winegrape Crush Survey in 1993.

There were 86 respondents to the survey who reported crushing grapes from McLaren Vale in 2023, compared with a record 95 in 2022.

The total estimated value of winegrapes from McLaren Vale in 2023 was just under $45.5 million compared with just under $64 million in 2022 – a decrease of 29 per cent. The overall average value declined by 6 per cent from $1809 per tonne to $1693 per tonne.

Grenache had the highest average value at $2432 per tonne (up 6 per cent). Shiraz declined by 9 per cent to $1734 per tonne, while Cabernet Sauvignon was down 12 per cent to $1554 per tonne. These two varieties have both seen decreases of more than $400 per tonne since 2020.

The price dispersion data shows a downward shift in prices compared with last year, with 31 per cent of red grapes purchased at $2000 per tonne and above, compared with 41 per cent last year.

According to Vinehealth Australia data, the total vineyard area in McLaren Vale as at 30 April 2023 is 7375 hectares, nearly identical with the 7377 hectares in 2022. The total area is around 51 hectares more than it was 5 years ago.

There were 24 hectares of new plantings (including top-working and replacements) in the 2022-23 planting season, including 7 hectares of Grenache, 4 hectares of Sangiovese and 4 hectares of Fiano.

McLaren Vale

Winegrape intake summary table – red winegrapes

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	7	$16,286	$2,399	0%			7	$16,286
Cabernet Franc	34	$63,027	$1,872	3%	10	23%	44	$81,856
Cabernet Sauvignon	3,070	$4,766,689	$1,554	-12%	2,208	42%	5,278	$8,197,995
Durif	4				5	54%	9	$21,048
Graciano	30				18	37%	48	$108,077
Grenache	789	$1,917,666	$2,432	6%	1,031	57%	1,819	$4,424,089
Lagrein	3				1	23%	4	$7,780
Malbec	9	$17,304	$1,914	-11%	27	75%	36	$69,172
Mataro/Mourvedre	323	$617,548	$1,914	5%	277	46%	600	$1,148,478
Merlot	371	$401,846	$1,084	-14%	211	36%	582	$630,778
Montepulciano	25	$52,055	$2,049	-1%	5	16%	30	$61,746
Muscat à Petits Grains Rouges					10	100%	10	$15,137
Nebbiolo					0	100%	0	$1,266
Nero d'Avola	62	$134,750	$2,168	2%	19	23%	81	$174,986
Petit Verdot	4				76	94%	80	$130,251
Pinot Noir	253	$360,338	$1,425	6%	19	7%	272	$387,417
Sangiovese	89	$171,075	$1,930	1%	86	49%	174	$336,820
Shiraz	9,388	$16,282,298	$1,734	-9%	5,813	38%	15,201	$26,364,378
Tempranillo	88	$174,278	$1,989	-0%	114	56%	201	$400,422
Touriga Nacional	30	$64,311	$2,134	-5%	55	65%	85	$181,526
Other red	56	$104,256	$1,846	-7%	144	72%	200	$363,075
Red Total	**14,634**	**$25,234,116**	**$1,725**	**-8%**	**10,128**	**41%**	**24,762**	**$43,122,583**

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

McLaren Vale

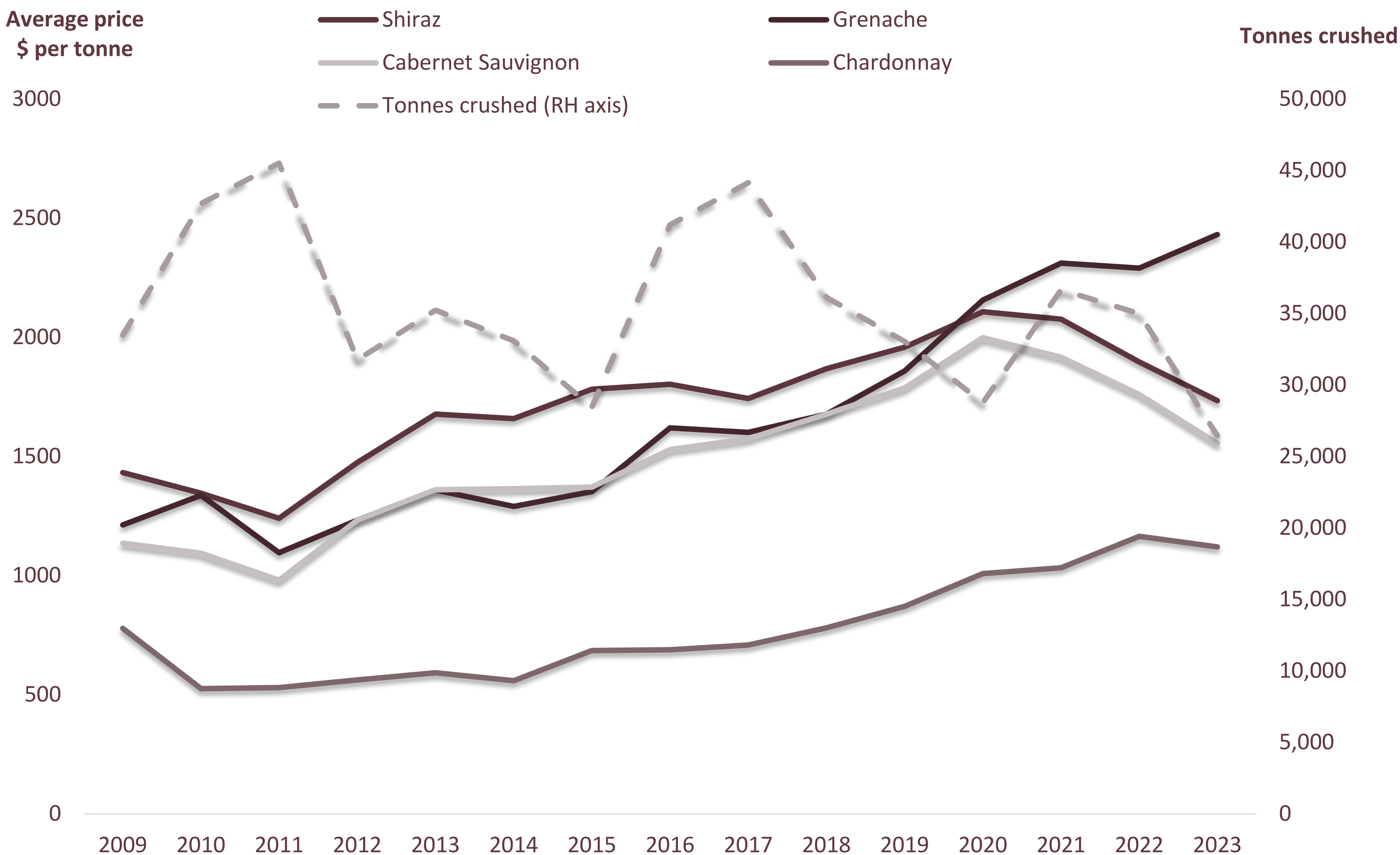
Winegrape intake summary table – white winegrapes

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	704	$788,422	$1,120	-4%	96	12%	800	$896,472
Chenin blanc	17	$37,240	$2,239	52%	7	30%	24	$53,520
Fiano	51	$92,573	$1,819	-7%	95	65%	146	$265,734
Marsanne	28				23	45%	52	$82,768
Muscat à Petits Grains Blancs	12	$16,831	$1,380	13%	5	31%	18	$24,240
Muscat Gordo Blanco					5	100%	5	$6,022
Pinot Gris/Grigio					97	100%	97	$137,919
Riesling	101	$137,663	$1,357	-6%	5	5%	107	$144,694
Roussanne					25	100%	25	$51,456
Sauvignon Blanc	35	$51,502	$1,461	-9%	65	65%	100	$145,938
Semillon	0				46	99%	46	$69,585
Verdelho	58	$67,162	$1,164	3%	7	11%	65	$75,519
Vermentino	26	$49,509	$1,940	-5%	28	53%	54	$104,314
Viognier	42	$65,073	$1,545	-2%	79	65%	122	$187,681
Other white	18	$38,552	$2,150	8%	28	61%	46	$81,038
White Total	**1,092**	**$1,390,448**	**$1,273**	**0%**	**613**	**36%**	**1,705**	**$2,326,901**
Grand Total	**15,726**	**$26,624,564**	**$1,693**	**-6%**	**10,741**	**41%**	**26,467**	**$45,449,484**

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

McLaren Vale

Historical weighted average price vs tonnes crushed



McLaren Vale

Price dispersion – purchased grapes (red)

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Barbera					7	7
Cabernet Franc			18	3	14	34
Cabernet Sauvignon	28	44	1,415	1,050	533	3,070
Durif					4	4
Graciano					30	30
Grenache			22	125	641	789
Lagrein					3	3
Malbec				4	5	9
Mataro/Mourvedre		3	41	180	99	323
Merlot		151	177	40	3	371
Montepulciano				6	19	25
Nero d'Avola					62	62
Petit Verdot				4		4
Pinot Noir			154	89	9	253
Sangiovese				57	32	89
Shiraz	175	229	3,292	2,710	2,982	9,388
Tempranillo				40	48	88
Touriga Nacional				8	22	30
Other red			10	8	38	56
Red Total	**202**	**427**	**5,129**	**4,324**	**4,551**	**14,633**

McLaren Vale

Price dispersion – purchased grapes (white)

Varieties	<$600	$600-<$900	$900-<$1500	$1500-<$2000	>$2000	Total purchased
			Tonnes purchased in each segment			
White						
Chardonnay		16	602	52	33	704
Chenin blanc			2		14	17
Fiano				25	26	51
Marsanne				28		28
Muscat à Petits Grains Blancs			10	2		12
Riesling	9		45	47		101
Sauvignon Blanc			30		6	35
Semillon				0		0
Verdelho			46	11		58
Vermentino				10	15	26
Viognier		7		35		42
Other white				2	16	18
White Total	**9**	**23**	**736**	**213**	**111**	**1,092**
Total purchased	**212**	**450**	**5,865**	**4,537**	**4,662**	**15,726**

McLaren Vale

Current plantings by variety and year planted - reds

	Area (hectares)					
Variety	**Pre-2020**	**2020**	**2021**	**2022**	**Total area (Ha)**	**% planted in 2022**
Red winegrapes						
Aglianico	5	0	1	1	7	14%
Barbera	12	0	0	0	12	0%
Cabernet Franc	22	0	0	0	22	0%
Cabernet Sauvignon	1,298	27	0	0	1,325	0%
Carignan	6	0	0	0	6	0%
Cinsault	3	0	0	0	3	0%
Durif	5	0	0	0	5	0%
Graciano	5	1	0	0	6	0%
Grenache	457	11	11	7	486	1%
Malbec	13	0	0	0	13	0%
Mataro (Mourvedre)	92	0	1	1	94	1%
Mencia	6	1	0	0	7	0%
Merlot	182	0	0	0	182	0%
Montepulciano	19	0	0	1	20	5%
Nebbiolo	2	0	0	0	2	0%
Nero D'Avola	25	0	2	2	29	7%
Petit Verdot	44	0	0	0	44	0%
Pinot Noir	46	0	0	0	46	0%
Sagrantino	7	0	0	0	7	0%
Sangiovese	41	0	0	4	45	9%
Saperavi	3	0	0	0	3	0%
Shiraz	4,113	67	12	1	4,193	0%
Tempranillo	65	4	3	1	73	1%
Touriga	21	0	0	0	21	0%
Zinfandel	4	0	0	0	4	0%
Other Red	28	0	0	0	28	0%
Total red varieties	**6,524**	**111**	**30**	**18**	**6,683**	**0%**

Source: Vinehealth Australia

McLaren Vale

Current plantings by variety and year planted - whites

	Area (hectares)					
Variety	**Pre-2020**	**2020**	**2021**	**2022**	**Total area (Ha)**	**% planted in 2022**
White winegrapes						
Chardonnay	264	0	0	0	264	0%
Chenin Blanc	14	0	0	0	14	0%
Fiano	29	4	8	4	45	9%
Grenache Blanc	2	0	0	0	2	0%
Muscat A Petit Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris	23	0	3	0	26	0%
Riesling	27	0	0	0	27	0%
Roussanne	12	0	0	0	12	0%
Sauvignon Blanc	39	0	0	0	39	0%
Semillon	16	0	0	0	16	0%
Verdelho	15	0	0	0	15	0%
Vermentino	5	1	0	0	6	0%
Viognier	49	0	0	0	49	0%
Other White	26	0	1	2	29	7%
Total white varieties	**531**	**5**	**12**	**6**	**554**	**1%**
Rootstock Block	4	0	0	0	4	0%
Unknown variety	134	0	0	0	134	0%
Total all varieties	**7,193**	**116**	**42**	**24**	**7,375**	**0%**

Source: Vinehealth Australia

SA Winegrape Crush Survey 2023

Regional Summary Report

Mount Benson Wine Region

Wine Australia July 2023

Mount Benson

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	121				249	67%	370	$365,407
Merlot	22				234	91%	256	$179,111
Shiraz	411				609	60%	1,020	$580,173
Red Total	**554**				**1,092**	**66%**	**1,646**	**$1,124,691**
White								
Chardonnay	40				260	87%	300	$270,407
Pinot Gris/Grigio	82	$107,142	$1,304	0%	67	45%	149	$194,583
Riesling					11	100%	11	$16,558
Sauvignon Blanc	297	$312,718	$1,053	-3%	304	51%	600	$632,529
Semillon	8						8	$6,024
White Total	**427**	**$462,280**	**$1,083**	**3%**	**642**	**60%**	**1,069**	**$1,120,101**
Grand Total	**981**	**$830,847**	**$847**	**-22%**	**1,734**	**64%**	**2,715**	**$2,244,792**

There were 9 respondents to the survey who reported crushing grapes from Mount Benson in 2023, compared with 7 in 2022.

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

Mount Benson

Price dispersion – purchased grapes

	Tonnes purchased in each segment				
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**Total purchased**
Red					
Cabernet Sauvignon	56		66		121
Merlot		22			22
Shiraz	116	290		5	411
Red Total	**172**	**312**	**66**	**5**	**554**
White					
Chardonnay			40		40
Pinot Gris/Grigio			50	32	82
Sauvignon Blanc		147	71	79	297
Semillon		8			8
White Total		**154**	**161**	**111**	**427**
Total purchased	**172**	**466**	**227**	**116**	**981**

Mount Benson

Current plantings by variety and year planted

	Area (hectares)					
Variety	**Pre-2020**	**2020**	**2021**	**2022**	**Total area (Ha)**	**% planted in 2022**
Red winegrapes						
Cabernet Sauvignon	113	0	0	0	113	0%
Merlot	50	0	0	0	50	0%
Pinot Noir	2	0	0	4	6	67%
Shiraz	175	12	0	0	187	0%
Other Red	3	0	0	0	3	0%
Total red varieties	**343**	**12**	**0**	**4**	**359**	**1%**
White winegrapes						
Chardonnay	33	0	0	0	33	0%
Pinot Gris	42	0	0	0	42	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	61	0	0	0	61	0%
Semillon	4	0	0	0	4	0%
Other White	4	0	0	0	4	0%
Total white varieties	**147**	**0**	**0**	**0**	**147**	**0%**
Total all varieties	**490**	**12**	**0**	**4**	**506**	**1%**

Source: Vinehealth Australia

SA Winegrape Crush Survey 2023

Regional Summary Report

Mount Gambier Wine Region

Wine Australia July 2023

Mount Gambier

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								
Pinot Noir	167	$347,842	$2,085	17%	2	1%	169	$352,221
Red Total	**167**	**$347,842**	**$2,085**	**17%**	**2**	**1%**	**169**	**$352,221**
White								
Chardonnay	105	$164,138	$1,556	17%			105	$164,138
Pinot Gris/Grigio	11						11	$19,800
Riesling	15						15	$27,978
Sauvignon Blanc	629	$1,001,151	$1,591	1%			629	$1,001,151
White Total	**761**	**$1,213,067**	**$1,594**	**3%**			**761**	**$1,213,067**
Grand Total	**928**	**$1,560,908**	**$1,682**	**7%**	**2**	**0%**	**930**	**$1,565,288**

There were 11 respondents to the survey who reported crushing grapes from Mount Gambier in 2023, compared with 9 in 2022.

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

Mount Gambier

Price dispersion – purchased grapes

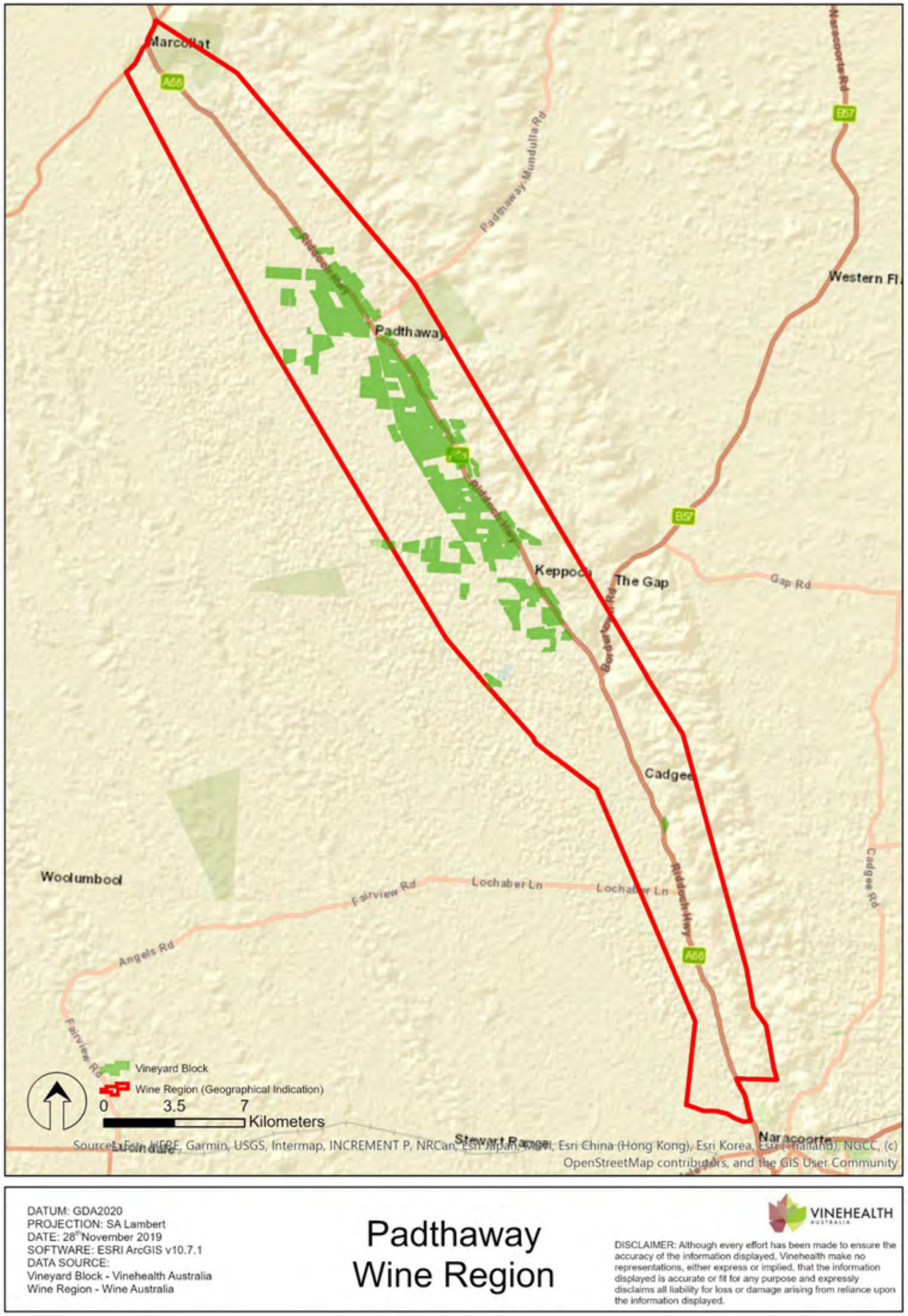
Tonnes purchased in each segment				
Varieties	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red				
Pinot Noir		95	71	167
Red Total		**95**	**71**	**167**
White				
Chardonnay	35	71		105
Pinot Gris/Grigio		11		11
Riesling		15		15
Sauvignon Blanc	49	580		629
White Total	**84**	**677**		**761**
Total purchased	**84**	**772**	**71**	**928**

Mount Gambier

Current plantings by variety and year planted

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	0%
Pinot Noir	69	0	0	0	69	0%
Total red varieties	**78**	**0**	**0**	**0**	**78**	**0%**
White winegrapes						
Chardonnay	40	0	0	0	40	0%
Pinot Gris	14	0	0	0	14	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	95	0	0	0	95	0%
Semillon	1	0	0	0	1	0%
Total white varieties	**155**	**0**	**0**	**0**	**155**	**0%**
Unknown varieties	18	0	0	0	18	0%
Total all varieties	**251**	**0**	**0**	**0**	**251**	**0%**

Source: Vinehealth Australia



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

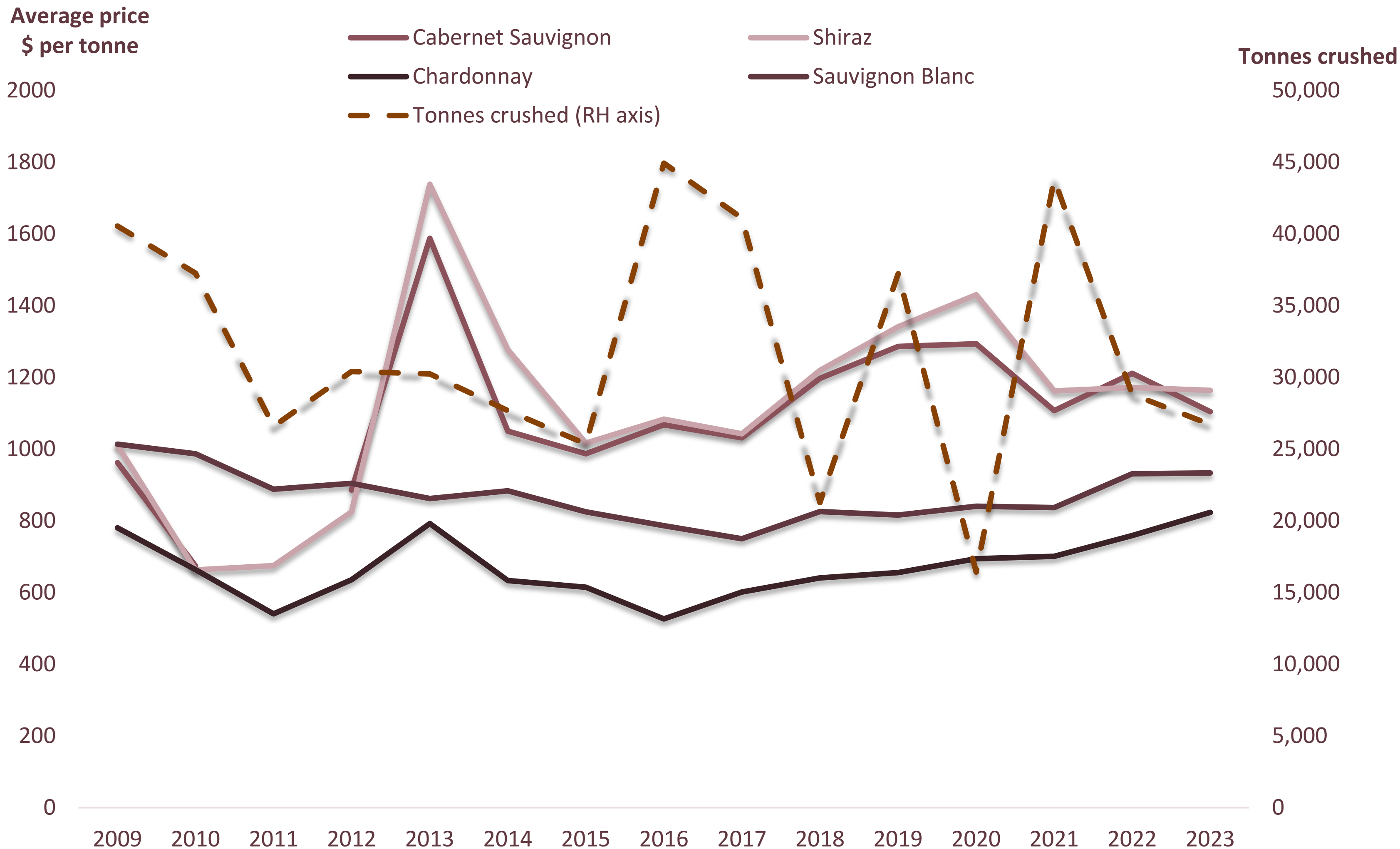
Winegrape intake summary table

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

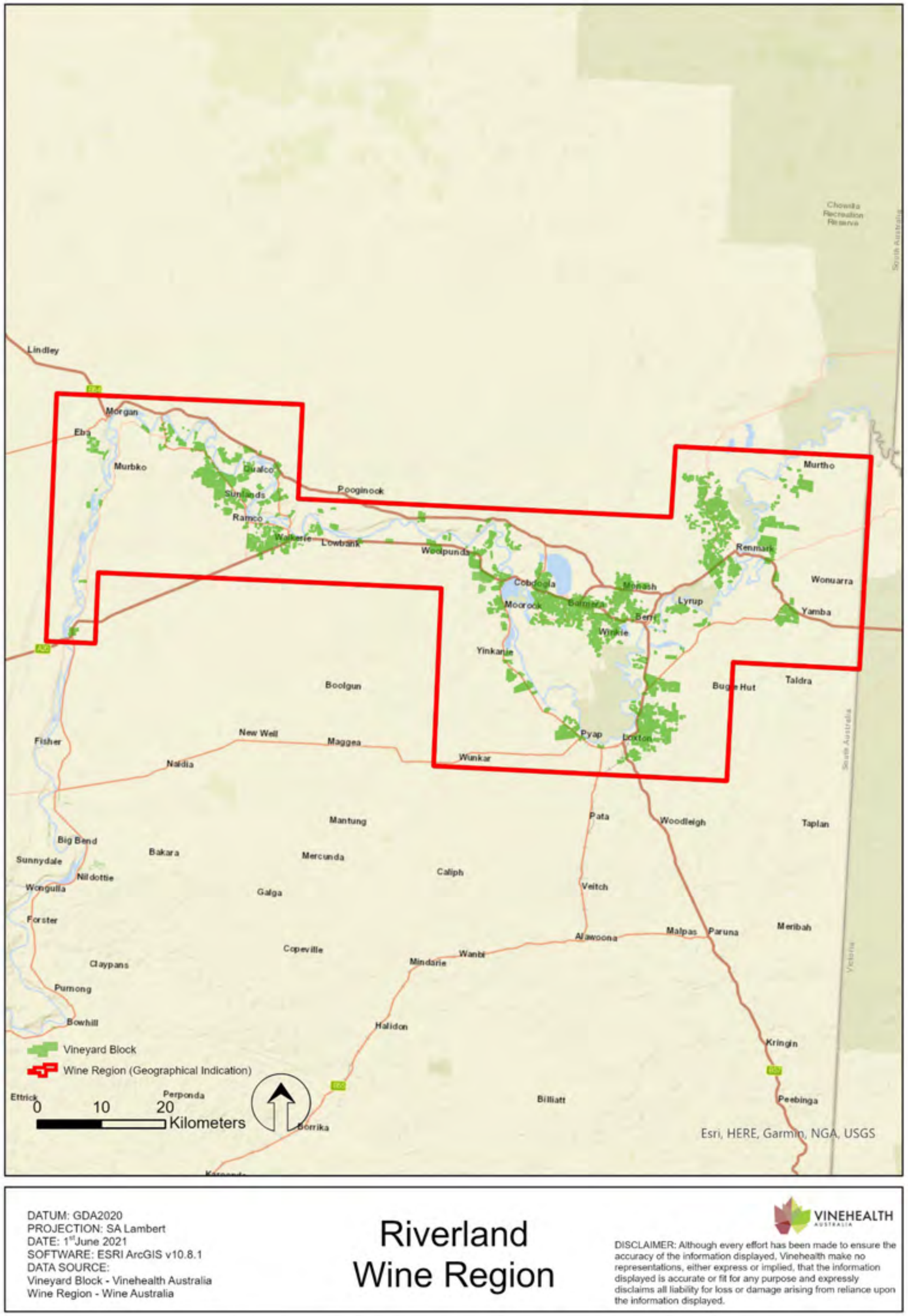
	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Cabernet Sauvignon	577	243	2,680	761		4,261
Graciano				12		12
Malbec			780			780
Merlot	192	337	107			637
Pinot Noir		160	226	211		597
Sangiovese			5	17	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



SA Winegrape Crush Survey 2023

Regional Summary Report

Riverland Wine Region

Wine Australia July 2023

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

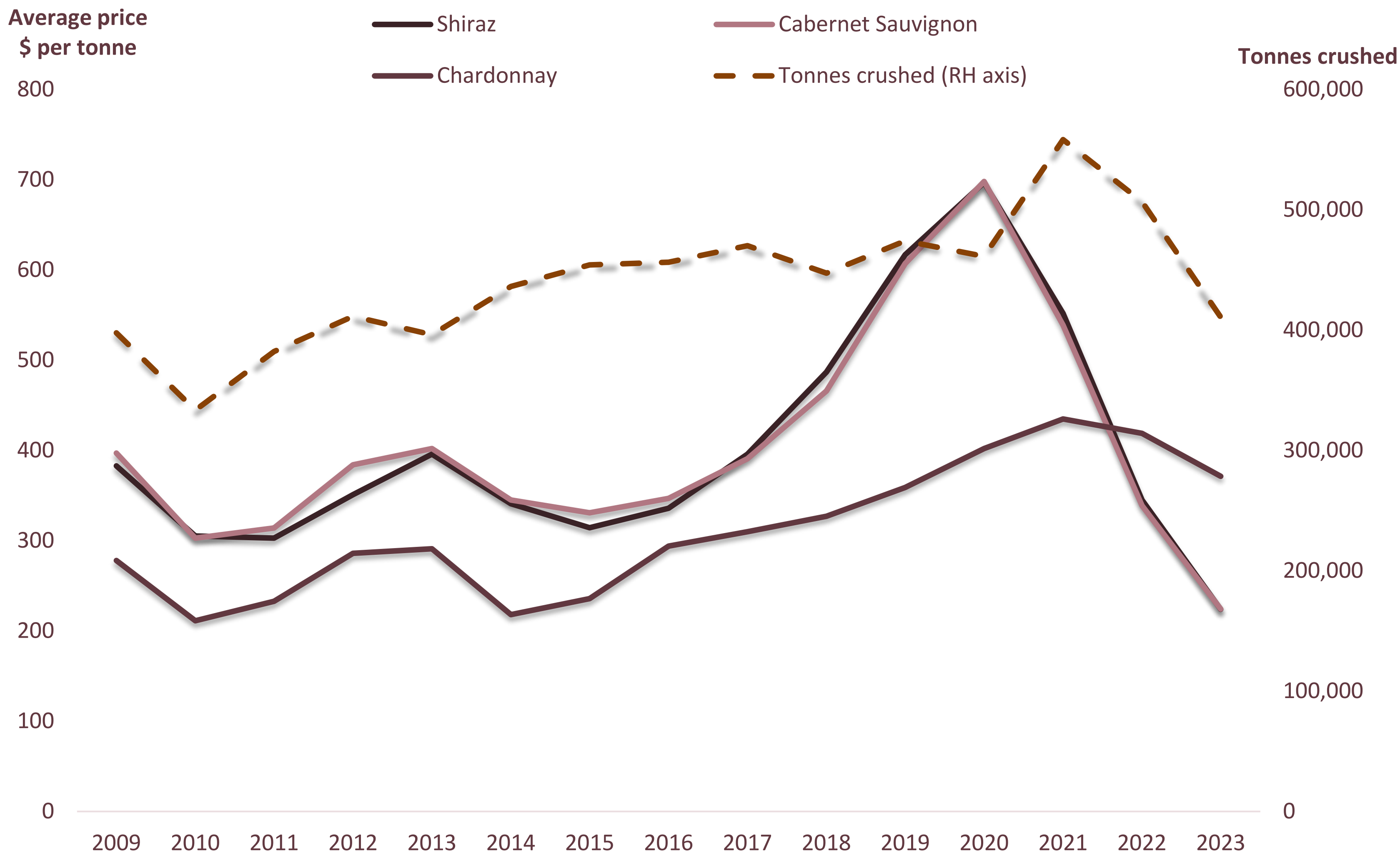
Winegrape intake summary table – whites

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)

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
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

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 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

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 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

DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Robe
Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

Robe Wine Region

Wine Australia July 2023

Robe

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					326	100%	326	$457,842
Merlot					14	100%	14	$12,944
Pinot Noir					595	100%	595	$1,394,883
Shiraz	94				451	83%	545	$871,584
Tempranillo					9	100%	9	$16,803
Red Total	**94**				**1,395**	**94%**	**1,489**	**$2,754,056**
White								
Chardonnay					916	100%	916	$1,268,379
Pinot Gris/Grigio	35						35	$53,280
Sauvignon Blanc					180	100%	180	$266,877
Semillon					165	100%	165	$197,199
White Total	**35**				**1,260**	**97%**	**1,295**	**$1,785,736**
Grand Total	**129**				**2,655**	**95%**	**2,783**	**$4,539,792**

There were 4 respondents to the survey who reported crushing grapes from Robe in 2023, compared with 6 in 2022.

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

Robe

Current plantings by variety and year planted

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Sauvignon	218	0	0	0	218	0%
Merlot	14	0	0	0	14	0%
Pinot Noir	61	0	0	0	61	0%
Shiraz	164	0	0	0	164	0%
Other Red	5	0	2	0	7	0%
Total red varieties	**462**	**0**	**2**	**0**	**464**	**0%**
White winegrapes						
Chardonnay	109	0	0	0	109	0%
Pinot Gris	6	0	0	0	6	0%
Sauvignon Blanc	10	0	0	0	10	0%
Semillon	12	0	0	0	12	0%
Total white varieties	**137**	**0**	**0**	**0**	**137**	**2%**
Total all varieties	**599**	**0**	**2**	**0**	**601**	**0%**

Source: Vinehealth Australia

SA Winegrape Crush Survey 2023

Regional Summary Report

Southern Fleurieu Wine Region

Wine Australia July 2023

Southern Fleurieu

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	65	$74,206	$1,138	20%			65	$74,206
Pinot Noir	50						50	$126,368
Shiraz	122	$103,918	$855	-3%			122	$103,918
Tempranillo	2						2	$5,616
Red Total	**238**	**$310,108**	**$1,301**	**48%**			**238**	**$310,108**
White								
Chardonnay	25						25	$14,421
Pinot Gris/Grigio	62						62	$74,473
Sauvignon Blanc	48	$61,918	$1,282	0%			48	$61,918
White Total	**135**	**$150,812**	**$1,115**	**2%**			**135**	**$150,812**
Grand Total	**374**	**$460,920**	**$1,234**	**30%**			**374**	**$460,920**

There were 8 respondents to the survey who reported crushing grapes from Southern Fleurieu in 2023, the same number as in 2022.

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

Southern Fleurieu

Price dispersion – purchased grapes

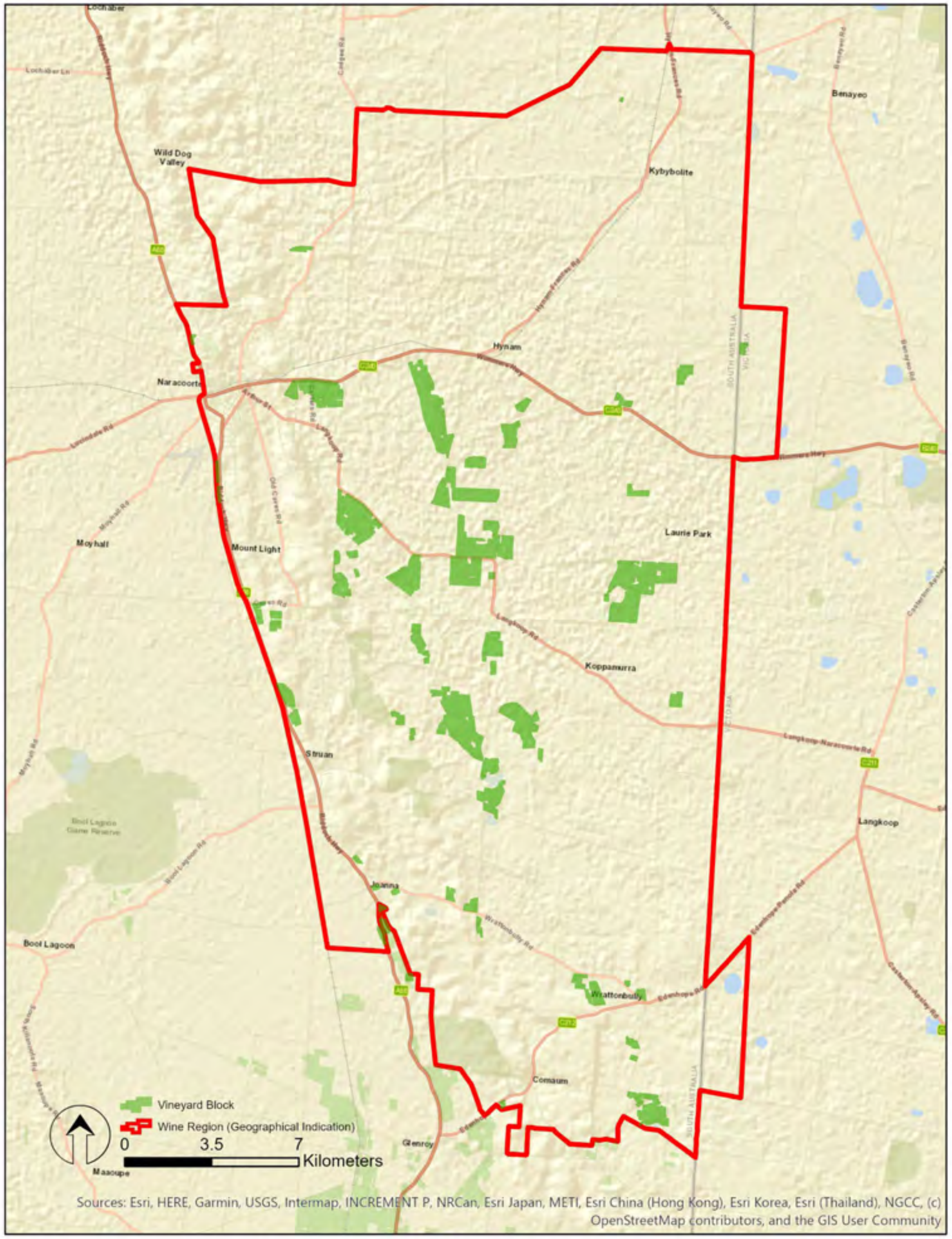
	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Cabernet Sauvignon	20	27			18	65
Pinot Noir				30	20	50
Shiraz	64	37			20	122
Tempranillo					2	2
Red Total	**85**	**64**		**30**	**60**	**238**
White						
Chardonnay	17	9				25
Pinot Gris/Grigio			62			62
Sauvignon Blanc			48			48
White Total	**17**	**9**	**110**			**135**
Total purchased	**101**	**73**	**110**	**30**	**60**	**374**

Southern Fleurieu

Current plantings by variety and year planted

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
	Area (hectares)					
Red winegrapes						
Cabernet Sauvignon	75	0	0	0	75	0%
Grenache	1	0	0	0	1	0%
Malbec	1	0	0	0	1	0%
Merlot	35	0	0	0	35	0%
Pinot Noir	27	0	0	0	27	0%
Shiraz	130	0	0	0	130	1%
Other Red	2	0	0	0	2	0%
Total red varieties	**271**	**0**	**0**	**0**	**271**	**0%**
White winegrapes						
Chardonnay	67	0	0	0	67	0%
Pinot Gris	25	0	8	0	25	0%
Sauvignon Blanc	61	0	0	0	61	0%
Savagnin	3	0	0	0	3	0%
Semillon	13	0	0	0	13	0%
Viognier	9	0	0	0	9	0%
Other White	3	0	0	0	3	0%
Total white varieties	**181**	**0**	**0**	**0**	**181**	**0%**
Total all varieties	**452**	**0**	**0**	**0**	**452**	**0%**

Source: Vinehealth Australia



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Wrattonbully Wine Region

VINEHEALTH AUSTRALIA

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SA Winegrape Crush Survey 2023

Regional Summary Report

Wrattonbully Wine Region

Wine Australia July 2023

Wrattonbully

Vintage overview

VINTAGE REPORT

Vintage 2023 will be remembered as a test of wills for the whole season. Coming out of winter was looking fantastic with solid winter rainfall and near full soil moisture profiles, but moderate rainfall continued throughout early spring, and the cold and moist conditions put the vine growth stages behind average. These wet conditions continued into later spring with rain events becoming closer together more intense, which made it near impossible to keep protective covers on the vines. These cool conditions pushed the majority of the flowering out to December with some effect on flowering leading to lower-than-average yields across all varieties.

The tough conditions continued into summer. This time it was the cool and overcast conditions slowing vine development, leading to a late veraison and pushing harvesting of all varieties back another week or so. Harvesting of early white varieties commenced in early March, but with the cool and mild conditions, the majority of the harvesting of whites occurred later in March and even into April, which is 2 weeks later than the long-term average. The mild conditions, combined with a favourable break in the weather at harvest, have meant the whites are looking good across the board, showing strong varietal characters and high crisp natural acidity.

The cooler ripening conditions pushed the harvesting of red varieties out, with the early varieties commencing in late in March. The bulk of red harvest didn't start until April, with most of the harvesting occurring in mid to late April. This coincided with a return to cool and wet conditions, making rates of sugar accumulation very slow and proving a testing time for growers and winemakers in deciding the optimal time to pick. It will come down to the condition of the fruit and picking decisions that determines the results for the red wines.

Tim Fletcher, Chairperson – Wrattonbully Wine Region Association.

OVERVIEW OF VINTAGE STATISTICS

The Wrattonbully reported crush in 2023 was 13,252 tonnes, 38 per cent lower than the 2022 crush of 21,211 tonnes. Over the past five years (up to 2022), the average crush for Wrattonbully has been 20,816 tonnes, making this year's crush 36 per cent below the five-year average. It was the fourth-lowest crush in the past 20-year period.

There were 22 respondents to the survey who reported crushing grapes from Wrattonbully in 2023, compared with 21 in 2022.

The total estimated value of winegrapes from Wrattonbully in 2023 was $15.6 million, compared with just under $27 million in 2022. The average purchase value of grapes overall decreased by 6 per cent from $1248 per tonne in 2022 to $1172 per tonne.

All varieties decreased in average value except for Cabernet Sauvignon which was up 1 per cent to $1282 per tonne. Shiraz was down 13 per cent to $1222 per tonne, Chardonnay was also down 13 per cent to $817 per tonne and Pinot Gris/Grigio was down 5 per cent to $1289 per tonne.

According to Vinehealth Australia data, the total vineyard area in Wrattonbully as at 30 April 2023 is 2751 hectares, virtually the same as 2022 and 71 hectares more than it was five years ago.

There were 17 hectares of new plantings in the 2022–23 planting season, evenly split between red and white varieties.

Wrattonbully

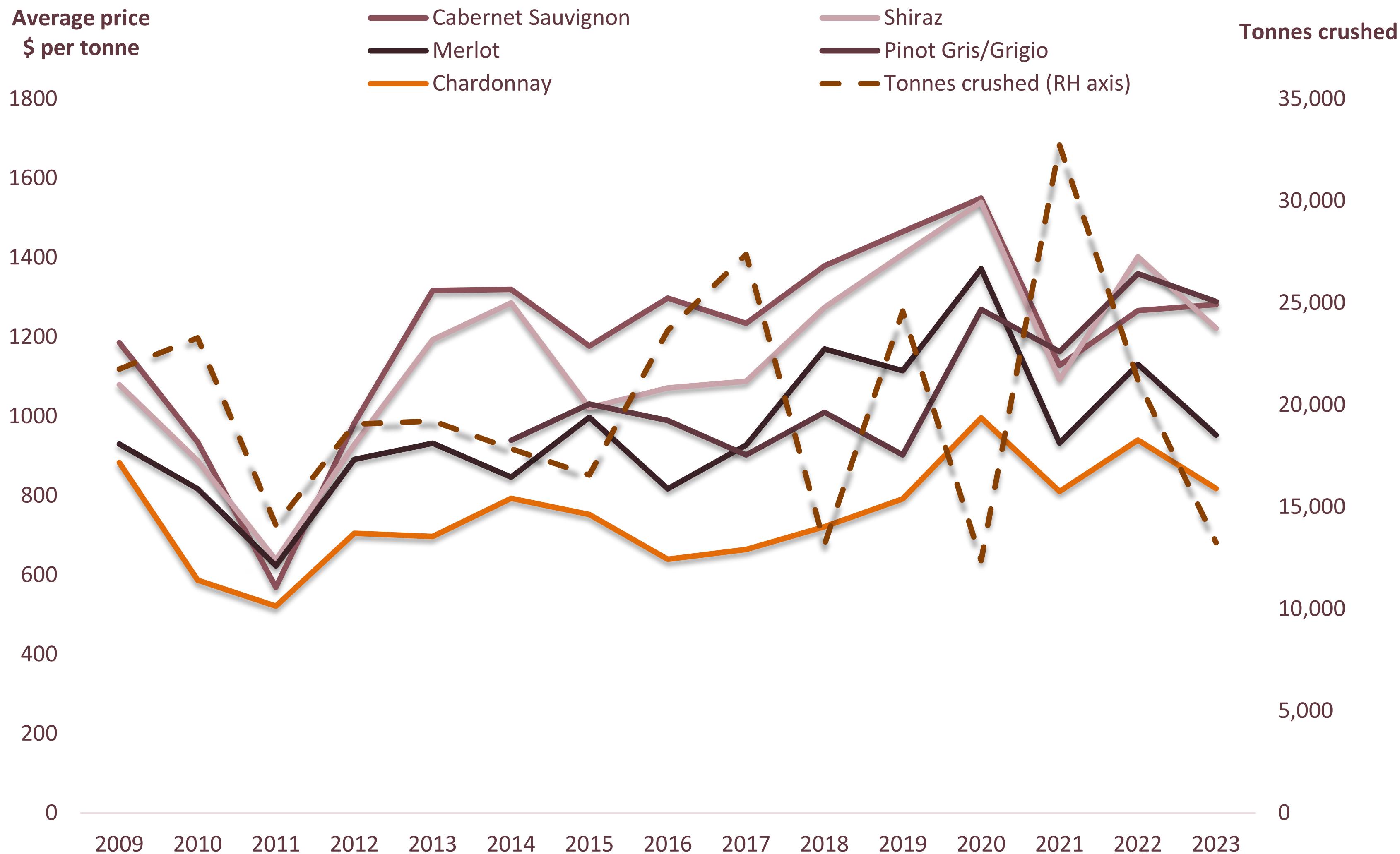
Winegrape intake summary table

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					3	100%	3	$3,924
Cabernet Sauvignon	2,439	$3,126,530	$1,282	1%	1,268	34%	3,707	$4,752,275
Grenache					36	100%	36	$80,380
Malbec	38	$40,625	$1,070	-8%	96	72%	134	$142,896
Merlot	673	$641,160	$952	-16%	451	40%	1,124	$1,070,287
Petit Verdot	4						4	$5,320
Pinot Noir	604	$730,794	$1,209	-22%	64	10%	668	$808,027
Sangiovese					48	100%	48	$69,577
Shiraz	2,762	$3,374,383	$1,222	-13%	1,779	39%	4,541	$5,547,837
Tempranillo	13				3	17%	15	$27,198
Red Total	**6,533**	**$7,941,420**	**$1,216**	**-7%**	**3,745**	**36%**	**10,278**	**$12,507,720**
White								
Chardonnay	942	$769,973	$817	-13%	256	21%	1,198	$979,213
Fiano	15						15	$30,200
Gewürztraminer	1						1	$1,511
Pinot Gris/Grigio	785	$1,012,170	$1,289	-5%	241	23%	1,026	$1,322,708
Prosecco	27						27	$27,060
Riesling	24				40	62%	64	$57,438
Sauvignon Blanc	203	$191,084	$943	-2%	343	63%	546	$514,634
Semillon					45	100%	45	$53,898
Viognier					52	100%	52	$75,703
White Total	**1,998**	**$2,053,886**	**$1,028**	**-2%**	**976**	**33%**	**2,974**	**$3,062,364**
Grand Total	**8,530**	**$9,995,307**	**$1,172**	**-6%**	**4,722**	**36%**	**13,252**	**$15,570,084**

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

Wrattonbully

Historical weighted average price vs tonnes crushed



Wrattonbully

Price dispersion – purchased grapes

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Cabernet Sauvignon	225	244	1,362	450	158	2,439
Malbec			38			38
Merlot	136	96	377	64		673
Petit Verdot			4			4
Pinot Noir			489	115		604
Shiraz	369	259	1,302	654	175	2,759
Tempranillo				13		13
Red Total	**730**	**598**	**3,573**	**1,295**	**333**	**6,530**
White						
Chardonnay	194	383	365			942
Fiano					15	15
Gewürztraminer			1			1
Pinot Gris/Grigio			727	59		785
Prosecco			27			27
Riesling			24			24
Sauvignon Blanc		84	118			203
White Total	**194**	**467**	**1,263**	**59**	**15**	**1,998**
Total purchased	**924**	**1,066**	**4,836**	**1,354**	**348**	**8,528**

Wrattonbully

Current plantings by variety and year planted

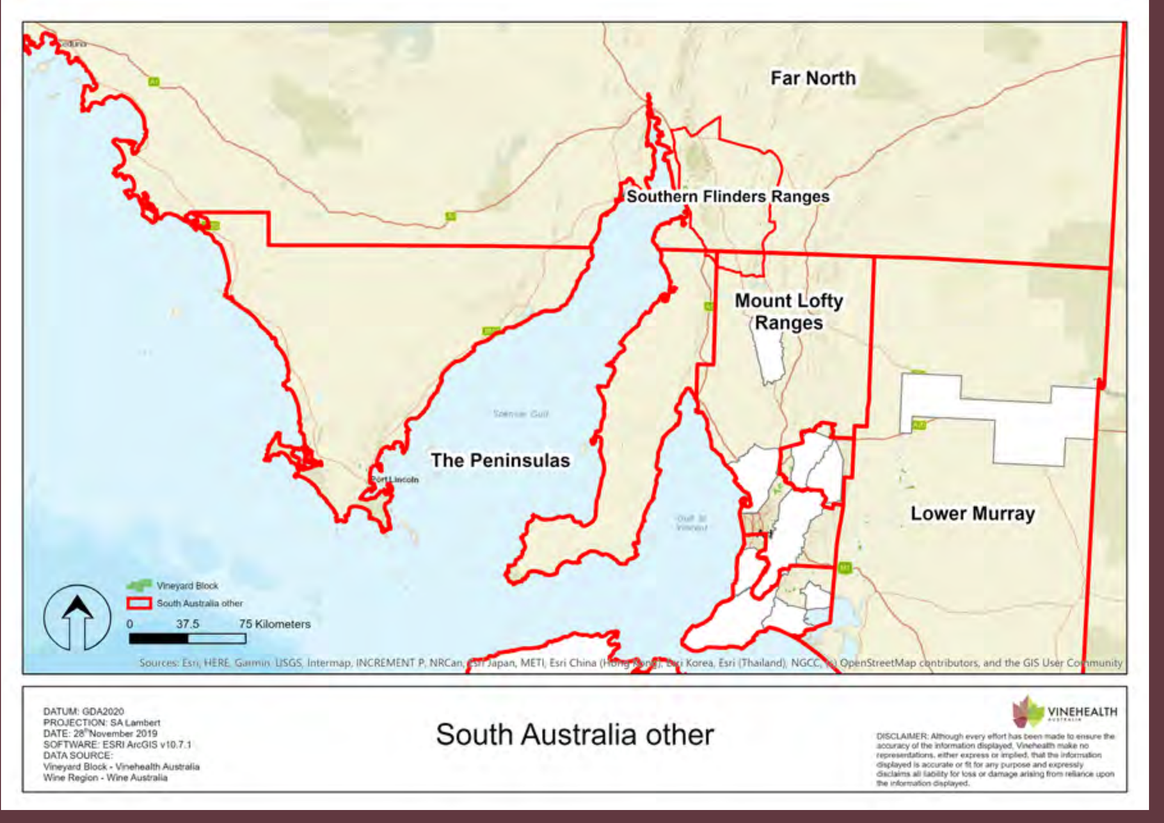
Variety	Area (hectares) Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Sauvignon	1,284	0	13	3	1,300	0%
Grenache	3	0	0	0	3	0%
Malbec	11	0	0	0	11	0%
Merlot	209	0	0	0	209	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	761	6	9	6	782	1%
Other Red	28	0	2	0	30	0%
Total red varieties	**2,359**	**6**	**24**	**9**	**2,398**	**0%**
White winegrapes						
Chardonnay	157	0	0	0	157	0%
Pinot Gris	99	0	8	0	107	0%
Riesling	8	0	0	0	8	0%
Sauvignon Blanc	59	0	0	0	59	0%
Other White	14	0	0	8	22	36%
Total white varieties	**337**	**0**	**8**	**8**	**353**	**2%**
Total all varieties	**2,696**	**6**	**32**	**17**	**2,751**	**1%**

Source: Vinehealth Australia

SA Winegrape Crush Survey 2023

GI Summary Report

SA – other



Wine Australia July 2023

Lower Murray zone - other

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	638	$124,778	$196	-50%			638	$124,778
Merlot	190	$40,511	$213	-38%			190	$40,511
Shiraz	1,635	$247,288	$151	-57%			1,635	$247,288
Red Total	**2,463**	**$412,576**	**$168**	**-54%**			**2,463**	**$412,576**
White								
Chardonnay	840	$322,246	$384	-8%			840	$322,246
Colombard	65						65	$18,975
Muscat Gordo Blanco	35						35	$10,208
Pinot Gris/Grigio	140	$77,111	$553	-5%			140	$77,111
Riesling	17						17	$7,650
Sauvignon Blanc	492	$275,035	$559	-4%			492	$275,035
White Total	**1,589**	**$711,224**	**$448**	**1%**			**1,589**	**$711,224**
Grand Total	**4,052**	**$1,123,800**	**$277**	**-32%**			**4,052**	**$1,123,800**

There were 7 respondents to the survey who reported crushing grapes from Lower Murray Zone – other in 2023, compared with 8 in 2022.

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

Lower Murray zone - other

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	61	0	0	0	61	0%
Grenache	2	0	0	0	2	0%
Merlot	18	0	0	0	18	0%
Petit Verdot	6	0	0	0	6	0%
Pinot Noir	1	0	0	0	1	0%
Shiraz	133	8	0	0	141	0%
Other Red	9	0	0	0	9	0%
Total red varieties	**230**	**8**	**0**	**0**	**238**	**0%**
White winegrapes						
Chardonnay	65	0	0	0	65	0%
Colombard	14	0	0	0	14	0%
Muscat Gordo Blanco	3	0	0	0	3	0%
Pinot Gris	4	0	0	0	4	0%
Riesling	10	0	0	0	10	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	3	0	0	0	3	0%
Total white varieties	**112**	**0**	**0**	**0**	**112**	**0%**
Unknown variety	17	0	0	0	17	0%
Total all varieties	**359**	**8**	**0**	**0**	**367**	**0%**

Source: Vinehealth Australia

Mount Lofty Ranges zone - other

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	78				3	4%	81	$61,459
Malbec					1	100%	1	$1,993
Mataro/Mourvedre	14						14	$38,304
Nebbiolo	9						9	$11,900
Sangiovese	71	$105,842	$1,481	13%			71	$105,842
Shiraz	390				45	10%	435	$653,312
Red Total	**562**	**$800,354**	**$1,425**	**1%**	**50**	**8%**	**611**	**$872,810**
White								
Chardonnay					0	100%	0	$526
Viognier					0	100%	0	$701
White Total					**1**	**100%**	**1**	**$1,227**
Grand Total	**562**	**$800,354**	**$1,425**	**1%**	**51**	**8%**	**612**	**$874,037**

There were 6 respondents to the survey who reported crushing grapes from Mount Lofty Ranges zone – other in 2023, compared with 9 in 2022.

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

Mount Lofty Ranges zone - other

Current plantings by variety and year planted

Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
	Area (hectares)					
Red winegrapes						
Cabernet Sauvignon	72	0	0	0	72	0%
Grenache	4	0	0	0	4	0%
Mataro	7	0	0	0	7	0%
Merlot	6	0	0	0	6	0%
Montepulciano	3	0	1	0	4	0%
Petit Verdot	6	0	0	0	6	0%
Sangiovese	12	0	0	0	12	0%
Shiraz	188	11	0	0	199	0%
Tempranillo	5	0	0	0	5	0%
Other Red	8	0	0	0	8	0%
Total red varieties	**311**	**11**	**1**	**0**	**323**	**0%**
White winegrapes						
Chardonnay	4	0	0	0	4	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	5	0	0	0	5	0%
Semillon	1	0	0	0	1	0%
Viognier	1	0	0	0	1	0%
Total white varieties	**17**	**0**	**0**	**0**	**17**	**0%**
Unknown variety	17	0	0	0	17	0%
Total all varieties	**345**	**11**	**1**	**0**	**357**	**0%**

Source: Vinehealth Australia

Southern Flinders Ranges

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	62				1	2%	63	$42,758
Merlot	42				1	2%	43	$23,474
Nebbiolo					1	100%	1	$2,851
Shiraz	435	$386,480	$888	-13%	1	0%	436	$387,368
Red Total	**539**	**$451,484**	**$838**	**-15%**	**4**	**1%**	**543**	**$456,451**
White								
Riesling					1	100%	1	$1,499
Semillon					1	100%	1	$1,197
White Total					**2**	**100%**	**2**	**$2,696**
Grand Total	**539**	**$451,484**	**$838**	**-15%**	**6**	**1%**	**545**	**$459,148**

There were 4 respondents to the survey who reported crushing grapes from Southern Flinders Ranges in 2023, compared with 5 in 2022.

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

Southern Flinders Ranges

Current plantings by variety and year planted

	Area (hectares)					
Variety	**Pre-2020**	**2020**	**2021**	**2022**	**Total area (Ha)**	**% planted in 2022**
Red winegrapes						
Cabernet Sauvignon	12	0	0	0	12	0%
Merlot	6	0	0	0	6	0%
Shiraz	123	0	0	0	123	0%
Other Red	0	0	0	0	0	0%
Total red varieties	**141**	**0**	**0**	**0**	**141**	**0%**
White winegrapes						
Other White	1	0	0	0	1	0%
Total white varieties	**1**	**0**	**0**	**0**	**1**	**0%**
Unknown variety	26	0	0	0	26	0%
Total all varieties	**168**	**0**	**0**	**0**	**168**	**0%**

Source: Vinehealth Australia

The Peninsulas

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	36				8	19%	45	$68,135
Merlot					2	100%	2	$1,686
Shiraz	91				11	10%	101	$159,573
Red Total	**127**				**21**	**14%**	**148**	**$229,395**
White								
Chardonnay					4	100%	4	$5,208
Fiano					0	100%	0	$704
Riesling					3	100%	3	$4,647
Sauvignon Blanc					10	100%	10	$14,803
Semillon					3	100%	3	$3,952
Viognier					3	100%	3	$4,681
White Total					**24**	**100%**	**24**	**$33,994**
Grand Total	**127**				**44**	**26%**	**171**	**$263,388**

There were 4 respondents to the survey who reported crushing grapes from the Peninsulas in 2023, the same as in 2022.

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

The Peninsulas

Current plantings by variety and year planted

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	0%
Grenache	1	0	0	0	1	0%
Merlot	2	0	0	0	2	0%
Shiraz	13	0	0	0	13	0%
Total red varieties	**25**	**0**	**0**	**0**	**25**	**0%**
White winegrapes						
Chardonnay	2	0	0	0	2	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	2	0	0	0	2	0%
Semillon	1	0	0	0	1	0%
Other White	3	0	0	0	3	0%
Total white varieties	**11**	**0**	**0**	**0**	**11**	**0%**
Unknown variety	34	0	0	0	34	0%
Total all varieties	**70**	**0**	**0**	**0**	**70**	**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 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

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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