

The SA Winegrape Crush Survey 2024

A photograph of a vineyard on a hillside. The vineyard is planted in neat, parallel rows of young green grapevines. In the foreground, there is a field of tall, golden-brown grass. A single black cow is standing in the grass on the right side. In the middle ground, there are several trees and a small, light-colored building. The background shows a line of taller trees on the crest of the hill under a clear sky.

Prepared on behalf of

South Australian Wine Industry Association Inc

Wine Grape Council South Australia

Wine Australia July 2024

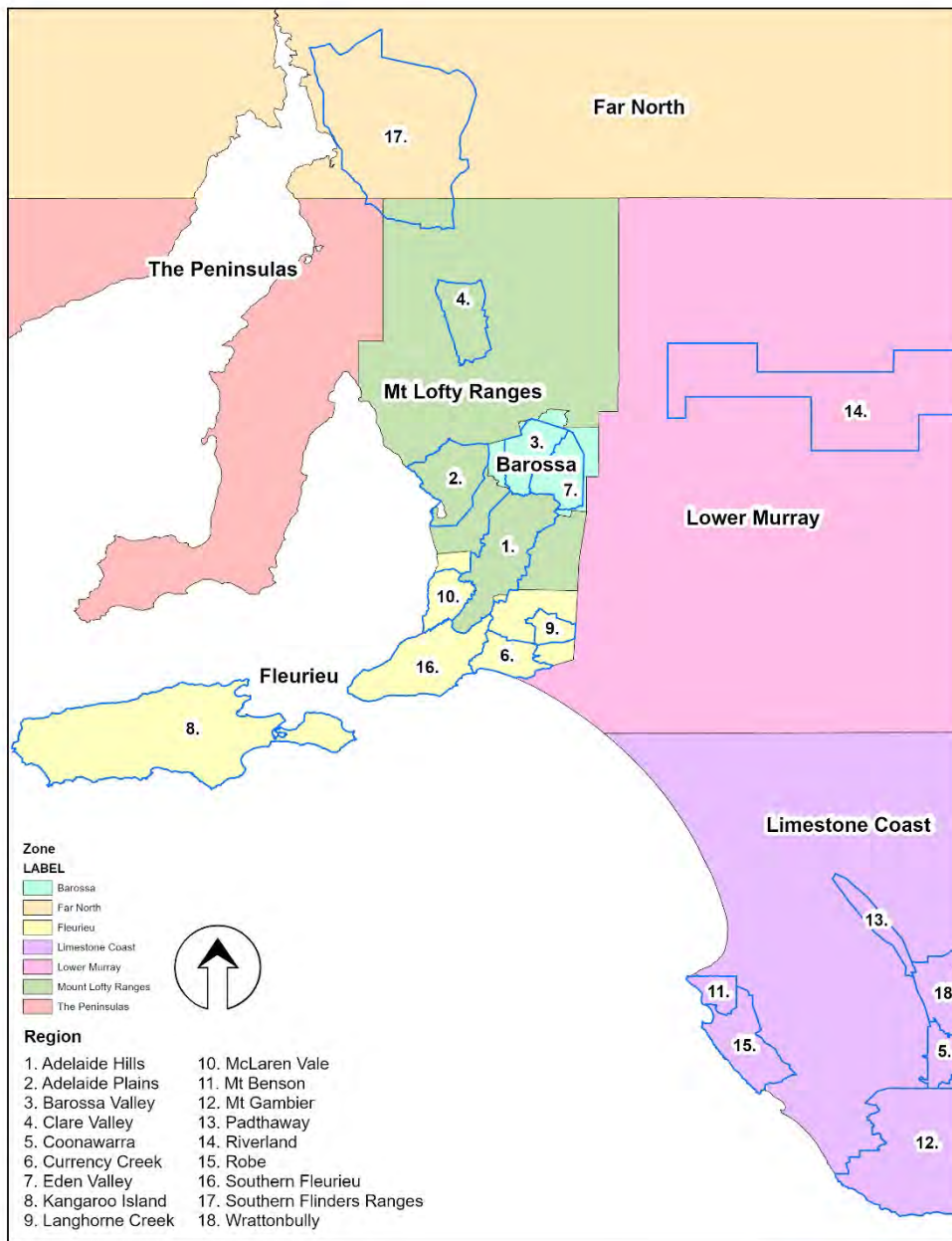
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SA Winegrape Crush Survey 2024

South Australia State Summary Report

Wine Australia July 2024



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



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State summary 2024

Overview of vintage statistics

State and regional overview

The total reported crush of South Australian winegrapes in 2024 was 619,400 tonnes. This was 6 per cent below the 2023 crush of 661,984 tonnes, and 19 per cent below both the 10-year average (2014-2023) of 769,014 tonnes and the 5-year average (2019–2023) of 765,996 tonnes. It was the second-smallest reported crush from South Australia since 2003.

There were 278 respondents reporting grapes crushed from SA regions in 2024, compared with 253 in 2023.

Despite the overall decline, many regions saw increases, particularly those in the Limestone Coast. Coonawarra was up by 33 per cent, Wrattontully was up by 15 per cent and Padthaway was up by 6 per cent. Padthaway moved up to be the second-largest region outside of the Riverland by crush size behind the Barossa Valley and just ahead of McLaren Vale. Clare Valley decreased the most (down 28 per cent) followed by the Barossa Valley (down 24 per cent) and the Adelaide Hills (down 21 per cent). Langhorne Creek was down 13 per cent.

After recording the lowest crush for 10 years with 410,888 tonnes in 2023, the Riverland saw a further 5 per cent decrease to 391,248 tonnes in 2024 – very similar to the 2013 crush of 396,199 tonnes. Its 2024 crush was also 16 per cent below its 10-year average of 467,597 tonnes.

The total estimated value of the crush was \$457 million, down \$58 million (11 per cent) compared with 2023, reflecting the decreased crush size combined with a 3.5 per cent decrease in the overall average value, which reduced from \$700 per tonne in 2023 to \$675 per tonne.

The weighted average prices for the top variety in each major region generally increased, with the exception of McLaren Vale Grenache (down 11 per cent to \$2166 per tonne after reaching a record of \$2432 per tonne in 2023) and Barossa Shiraz, which declined for the fourth year in a row to be \$1866 per tonne, its lowest since 2014. Adelaide Hills Sauvignon Blanc increased by 4 per cent to a new record \$2071 per tonne. Clare Riesling continued its steady rise, increasing by 3 per cent to \$1645 per tonne, making it the highest-valued major variety in the region for the first time since 2005.

Varietal overview

The red crush from South Australian vineyards was 365,582 tonnes in 2024, down by 11 per cent compared with 2023 and 25 per cent below the five-year average of 484,936 tonnes. Shiraz accounted for 47 per cent of the reds and decreased by 19 per cent while the other top varieties, Cabernet Sauvignon (down 6 per cent) and Merlot (down 13 per cent), also declined. Conversely, Pinot Noir (up 8 per cent) and Grenache (up 14 per cent) both increased, against the overall trend.

The white crush was virtually identical to the 2023 figure at 253,818 tonnes. It increased its share of the total crush from 38 per cent in 2023 to 41 per cent in 2024. The overall flat result was largely driven by a 10 per cent increase in Chardonnay, offset by a 16 per cent decrease in Sauvignon Blanc, a 15 per cent decrease in Muscat Gordo Blanco and a 24 per cent decrease in Semillon.

Vineyard plantings

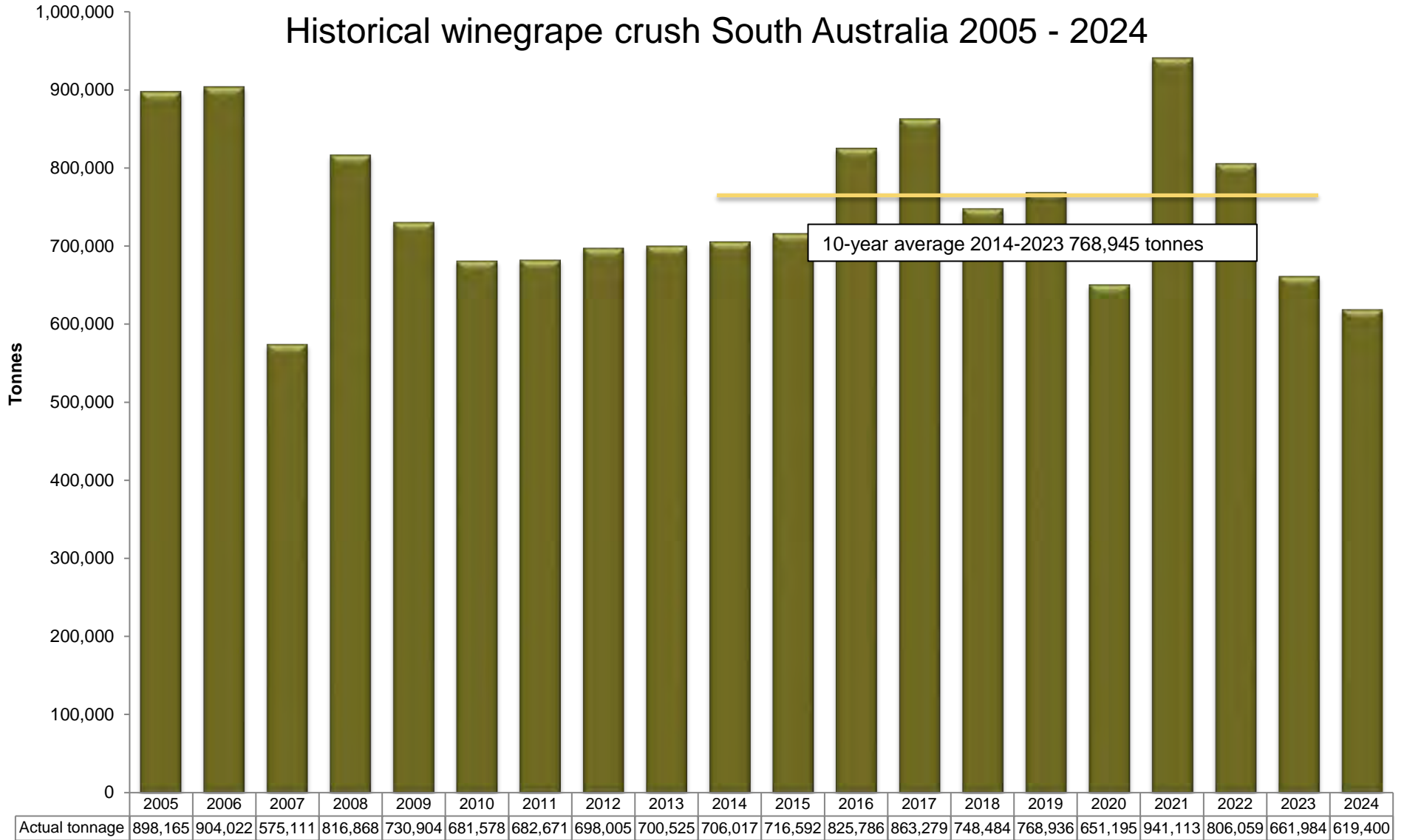
Planting data derived from the Vinehealth Australia vineyard register shows that there were 74,732 hectares planted to vines in South Australia as at 30 April 2024. This represents a net decrease of 753 hectares in the last 12 months.

The largest percentage decrease was in Limestone Coast Other (down 14 per cent), while Currency Creek had the largest increase (up 13 per cent).

Despite the net decrease, there were plantings over the last year, with a total of 337 hectares planted to winegrapes in the 2023–24 planting season (including topworking and replacements) compared with 509 hectares in the previous season. The most-planted varieties were Sauvignon Blanc (65 hectares), Pinot Noir (45 hectares) and Grenache (35 hectares). The largest area of new plantings in the state was in the Riverland (89 hectares) followed by the Barossa Valley (66 hectares).

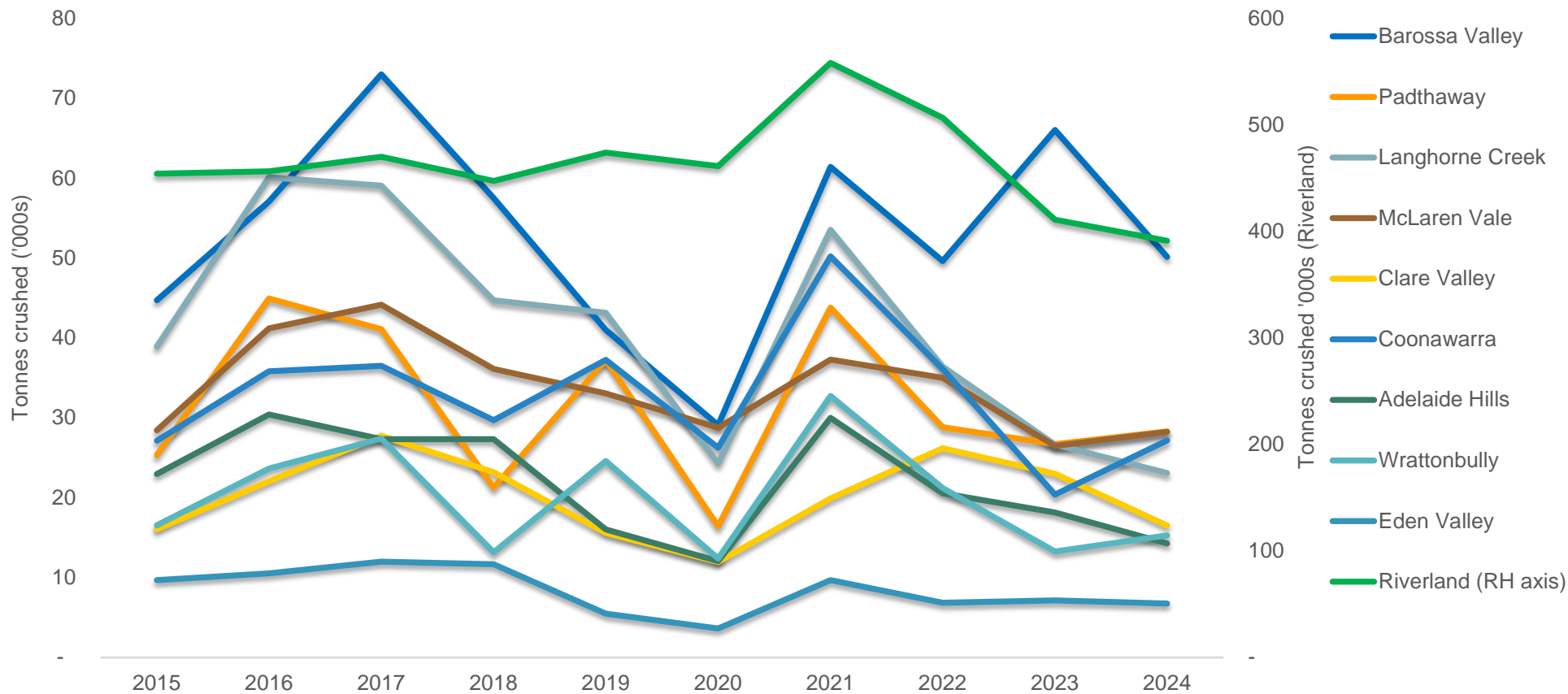
There were 3,182 vineyard owners registered with Vinehealth Australia as at 30 April 2024, compared with 3,234 in 2023.

State summary 2024



State summary 2024

Vintage (crush) by region 2015 - 2024



State summary 2024

Total crush by GI region 2024 vs 2023

GI Region	Purchased (tonnes)	Winery grown (tonnes)	2024	Region share of state	2023	% change
Adelaide Hills	9,601	4,674	14,275	2.3%	18,125	-21%
Adelaide Plains	1,560	38	1,598	<1%	1,520	5%
Barossa Valley	28,998	20,453	49,451	8.0%	64,952	-24%
Barossa zone other	62	633	694	0.1%	1,079	-36%
Clare Valley	8,226	8,272	16,498	2.7%	22,987	-28%
Coonawarra	6,898	20,245	27,143	4.4%	20,373	33%
Currency Creek	2,717	798	3,515	0.6%	3,880	-9%
Eden Valley	3,267	3,469	6,736	1.1%	7,129	-6%
Fleurieu zone other	696	-	696	<1%	696	0%
Kangaroo Island	-	127	127	<1%	124	2%
Langhorne Creek	17,847	5,255	23,102	3.7%	26,653	-13%
Limestone Coast zone other	2,884	225	3,109	<1%	4,969	-37%
Lower Murray zone other	2,405	88	2,493	<1%	4,052	-38%
McLaren Vale	17,682	10,560	28,242	4.6%	26,467	7%
Mount Benson	836	1,310	2,147	<1%	2,715	-21%
Mount Gambier	732	26	758	<1%	930	-18%
Mount Lofty Ranges zone other	475	28	503	<1%	612	-18%
Padthaway	22,506	5,776	28,282	4.6%	26,706	6%
Riverland	287,075	104,173	391,248	63.2%	410,888	-5%
Robe	165	2,803	2,969	<1%	2,783	7%
Southern Fleurieu	158	21	179	<1%	374	-52%
Southern Flinders Ranges	151	1	152	<1%	545	-72%
The Peninsulas	162	55	217	<1%	171	27%
Wrattonbully	10,103	5,166	15,268	2.5%	13,252	15%
Grand Total	425,205	194,195	619,400	100.0%	661,984	-6%

State summary 2024

Vintage summary by GI region 2024

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2024	Est value of purchased grapes	Est value of all grapes
Adelaide Hills	Red	1,530	3,450	4,980	\$7,902,720	\$11,182,347
	White	3,143	6,152	9,295	\$13,703,253	\$20,559,422
	Total	4,674	9,601	14,275	\$21,605,973	\$31,741,769
Adelaide Plains	Red	29	1,093	1,122	\$993,671	\$1,022,235
	White	10	466	476	\$522,531	\$532,450
	Total	38	1,560	1,598	\$1,516,202	\$1,554,685
Barossa Valley inc Barossa Zone other	Red	20,352	26,284	46,636	\$49,771,542	\$87,518,055
	White	733	2,776	3,509	\$2,612,624	\$3,405,873
	Total	21,085	29,060	50,145	\$52,384,167	\$90,923,929
Clare Valley	Red	4,423	3,763	8,186	\$5,794,001	\$12,811,762
	White	3,848	4,463	8,312	\$7,022,603	\$13,102,073
	Total	8,272	8,226	16,498	\$12,816,604	\$25,913,834
Coonawarra	Red	17,107	5,816	22,923	\$8,056,807	\$31,808,951
	White	3,138	1,082	4,220	\$1,126,918	\$4,329,992
	Total	20,245	6,898	27,143	\$9,183,726	\$36,138,942
Currency Creek	Red	348	2,241	2,589	\$2,502,487	\$2,892,452
	White	450	475	925	\$428,634	\$801,744
	Total	798	2,717	3,515	\$2,931,121	\$3,694,196
Eden Valley	Red	1,570	1,417	2,987	\$3,490,373	\$7,413,140
	White	1,899	1,850	3,749	\$3,360,330	\$6,949,486
	Total	3,469	3,267	6,736	\$6,850,703	\$14,362,626
Fleurieu zone - other inc Southern Fleurieu and Kangaroo Island	Red	103	142	245	\$163,676	\$312,439
	White	45	711	757	\$596,668	\$663,470
	Total	148	853	1,002	\$760,344	\$975,909

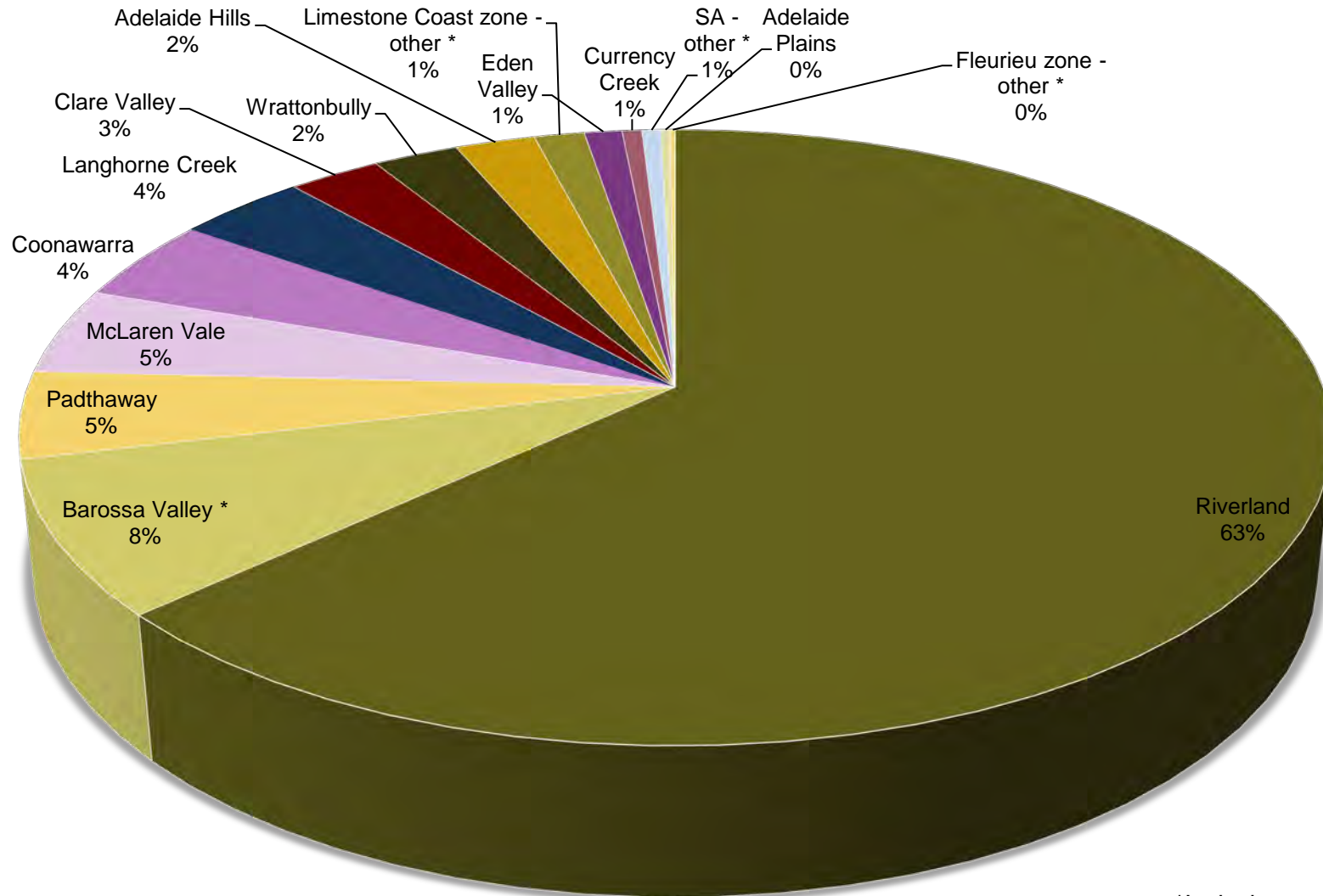
State summary 2024

Vintage summary by GI region 2024 (continued)

Region	Colour	Winery grown (tonnes)	Purchased (tonnes)	Total crush 2024	Est value of purchased grapes	Est value of all grapes
Langhorne Creek	Red	3,707	13,954	17,661	\$12,863,653	\$16,411,283
	White	1,548	3,893	5,441	\$2,926,125	\$4,926,198
	Total	5,255	17,847	23,102	\$15,789,778	\$21,337,481
Limestone Coast zone - other inc Robe, Mt Benson and Mt Gambier	Red	2,612	3,228	5,840	\$3,644,863	\$7,743,276
	White	1,753	1,389	3,142	\$1,863,846	\$4,283,752
	Total	4,365	4,618	8,983	\$5,508,709	\$12,027,028
McLaren Vale	Red	9,609	16,002	25,611	\$26,001,510	\$42,251,120
	White	951	1,680	2,631	\$2,172,129	\$3,696,976
	Total	10,560	17,682	28,242	\$28,173,638	\$45,948,096
Padthaway	Red	4,503	12,600	17,103	\$15,791,159	\$21,170,868
	White	1,273	9,906	11,179	\$8,655,147	\$9,709,558
	Total	5,776	22,506	28,282	\$24,446,307	\$30,880,427
Riverland	Red	71,886	124,833	196,719	\$29,561,260	\$46,704,996
	White	32,287	162,242	194,529	\$60,154,146	\$72,525,039
	Total	104,173	287,075	391,248	\$89,715,406	\$119,230,035
Wrattonbully	Red	3,564	7,311	10,875	\$10,298,471	\$15,384,471
	White	1,602	2,792	4,394	\$3,198,096	\$4,974,446
	Total	5,166	10,103	15,268	\$13,496,567	\$20,358,917
SA - other inc The Peninsulas and Southern Flinders Ranges	Red	67	2,038	2,105	\$1,416,660	\$1,495,152
	White	105	1,155	1,260	\$457,828	\$536,253
	Total	172	3,192	3,365	\$1,874,489	\$2,031,405
All winegrapes	Total	194,195	425,205	619,400	\$287,053,733	\$457,119,278

State summary 2024

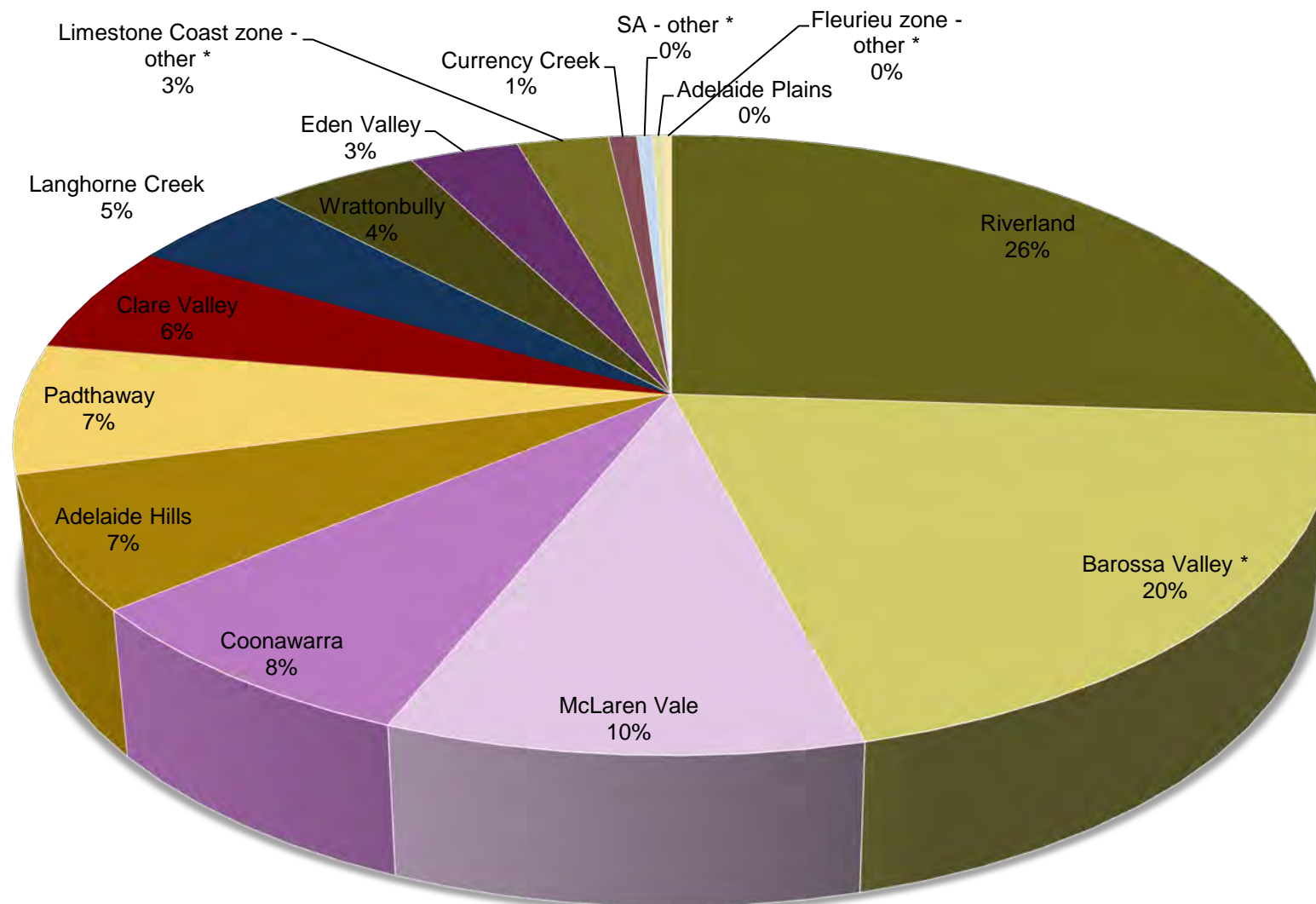
Share of crush volume by region 2024



*Inclusions as on page 6-7

State summary 2024

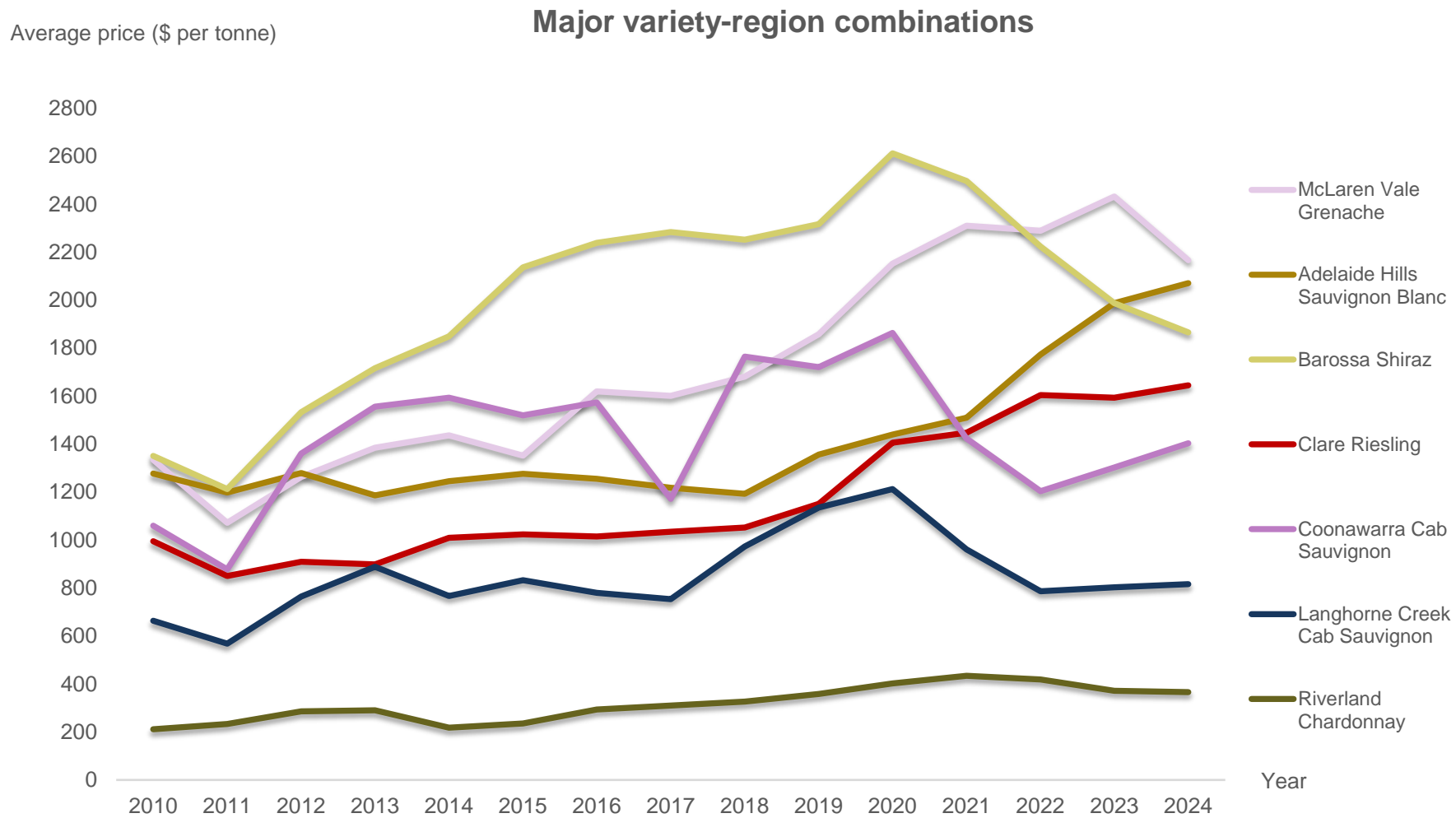
Share of crush value by region 2024



*Inclusions as on page 6-7

State summary 2024

Historical weighted average prices 2010 – 2024

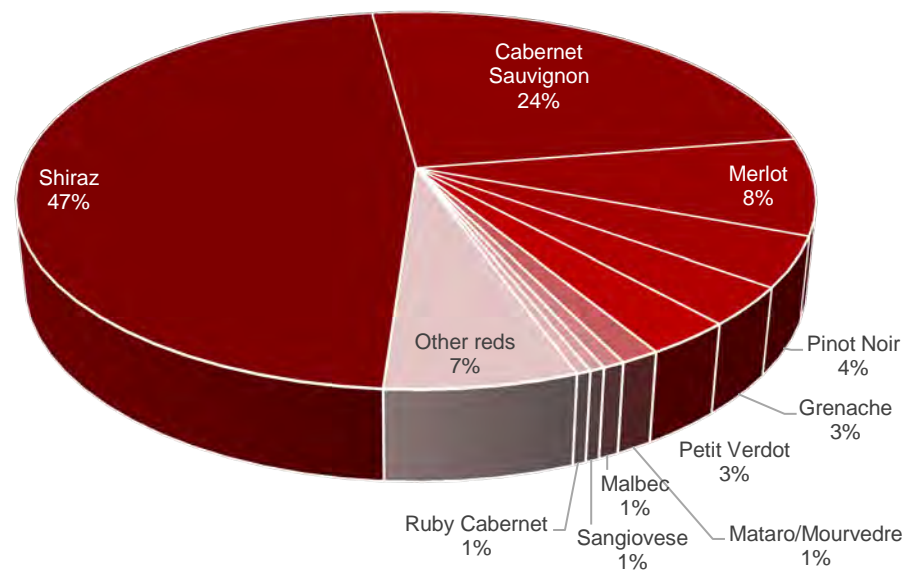


State summary 2024

Vintage summary by variety 2024 – red winegrapes

Variety	Purchased (tonnes)	Winery grown (tonnes)	Total crush 2024	Purchased as share of total
Barbera	32	20	52	61%
Cabernet Franc	183	300	483	38%
Cabernet Sauvignon	55,283	34,244	89,527	62%
Durif	1,071	81	1,152	93%
Graciano	76	25	101	75%
Grenache	8,073	4,088	12,160	66%
Lagrein	11	5	17	69%
Malbec	2,013	757	2,770	73%
Mataro/Mourvedre	3,795	1,182	4,976	76%
Merlot	16,443	13,920	30,363	54%
Montepulciano	366	173	539	68%
Muscat à Petits Grains Rouges	111	28	138	80%
Nebbiolo	39	52	91	43%
Nero d'Avola	41	73	114	36%
Other red	3,400	16,003	19,403	18%
Petit Verdot	5,127	5,920	11,047	46%
Pinot Meunier	126	8	133	94%
Pinot Noir	12,378	3,235	15,612	79%
Ruby Cabernet	897	921	1,818	49%
Sangiovese	1,085	817	1,902	57%
Shiraz	112,278	58,776	171,054	66%
Tempranillo	1,249	468	1,717	73%
Touriga Nacional	94	315	409	23%
Red Total	224,172	141,410	365,582	61%

Share of red crush by variety

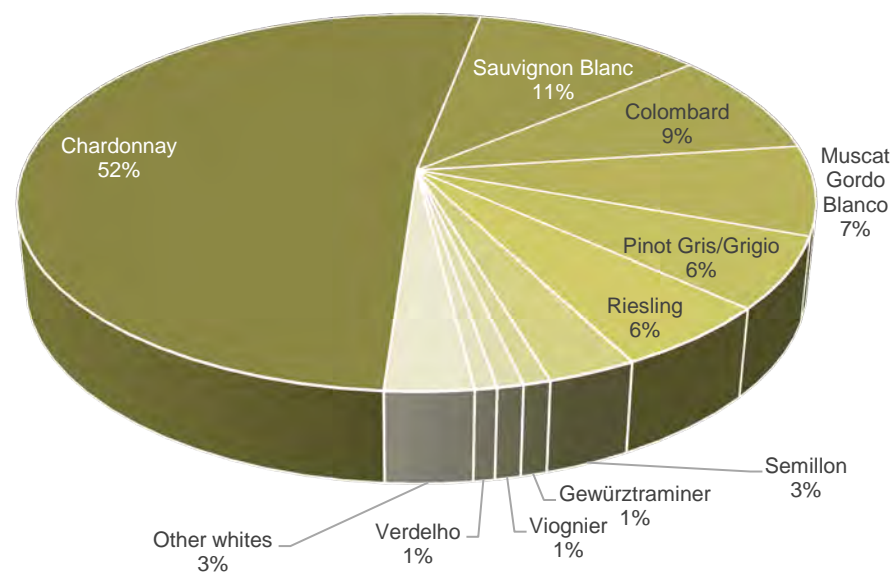


State summary 2024

Vintage summary by variety 2024 – white winegrapes

Variety	Purchased (tonnes)	Winery grown (tonnes)	Total crush 2024	Purchased as share of total
Chardonnay	109,463	22,326	131,789	83%
Chenin blanc	1,086	16	1,102	99%
Colombard	19,742	2,780	22,522	88%
Fiano	372	281	653	57%
Gewürztraminer	1,047	1,354	2,401	44%
Grüner Veltliner	23	163	186	12%
Marsanne	51	73	124	41%
Muscat à Petits Grains Blancs	1,018	518	1,535	66%
Muscat Gordo Blanco	17,396	2,095	19,492	89%
Other white	2,375	572	2,947	81%
Pinot Gris/Grigio	11,900	3,606	15,506	77%
Prosecco	509	25	534	95%
Riesling	8,203	6,215	14,419	57%
Roussanne	54	37	91	60%
Sauvignon Blanc	20,815	6,982	27,797	75%
Semillon	4,001	3,880	7,882	51%
Verdelho	990	940	1,930	51%
Vermentino	444	145	589	75%
Viognier	1,544	776	2,320	67%
White Total	201,033	52,785	253,818	79%
Grand Total	425,205	194,195	619,400	69%

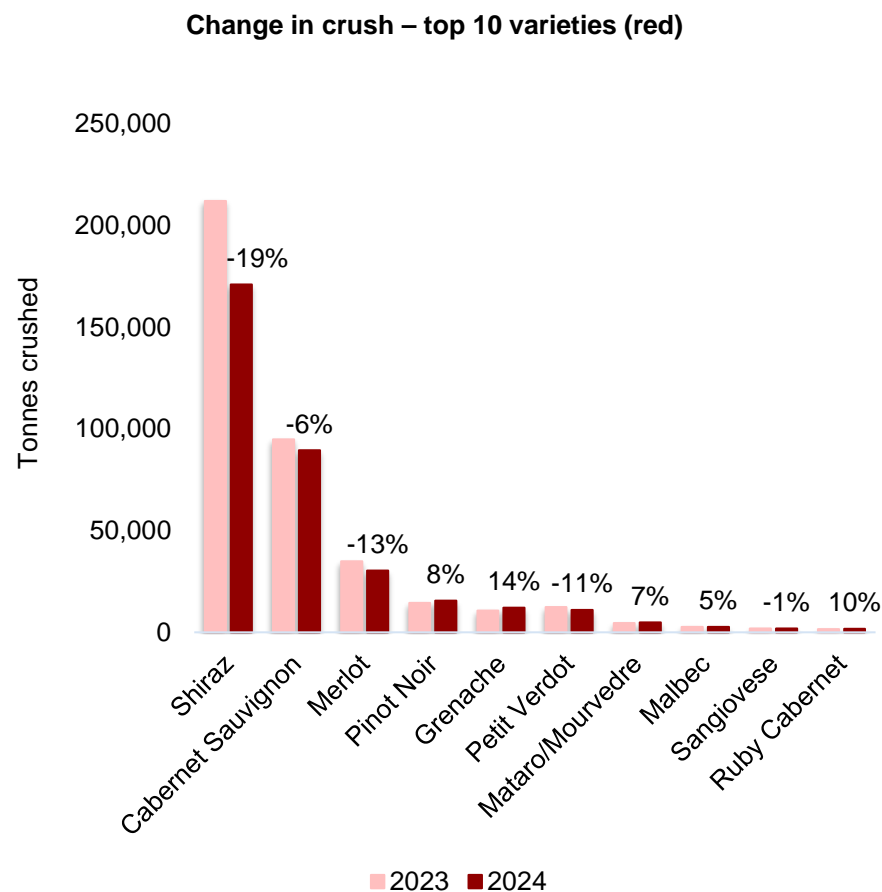
Share of white crush by variety



State summary 2024

Year-on-year comparison by variety 2024 vs 2023 – red winegrapes

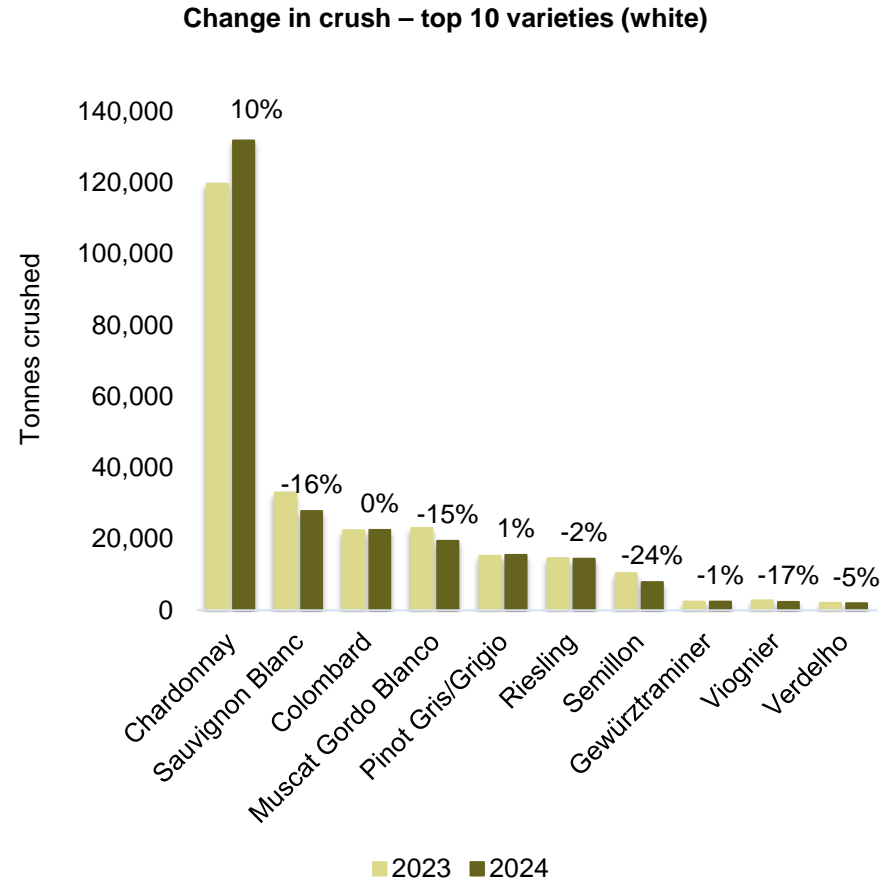
	2023	2024	% change
Red			
Shiraz	212,049	171,054	-19%
Cabernet Sauvignon	94,913	89,527	-6%
Merlot	34,931	30,363	-13%
Pinot Noir	14,493	15,612	8%
Grenache	10,643	12,160	14%
Petit Verdot	12,432	11,047	-11%
Mataro/Mourvedre	4,662	4,976	7%
Malbec	2,648	2,770	5%
Sangiovese	1,921	1,902	-1%
Ruby Cabernet	1,650	1,818	10%
Tempranillo	1,744	1,717	-2%
Durif	1,831	1,152	-37%
Montepulciano	395	539	36%
Cabernet Franc	398	483	22%
Touriga Nacional	331	409	24%
Muscat à Petits Grains Rouges	290	138	-52%
Pinot Meunier	166	133	-20%
Nero d'Avola	159	114	-28%
Graciano	122	101	-17%
Nebbiolo	53	91	71%
Barbera	65	52	-20%
Lagrein	36	17	-54%
Other red	12,781	19,403	52%
Red Total	408,715	365,582	-11%



State summary 2024

Year-on-year comparison by variety 2024 vs 2023 – white winegrapes

	2023	2024	% change
White			
Chardonnay	119,736	131,789	10%
Sauvignon Blanc	33,051	27,797	-16%
Colombard	22,466	22,522	0%
Muscat Gordo Blanco	23,032	19,492	-15%
Pinot Gris/Grigio	15,289	15,506	1%
Riesling	14,648	14,419	-2%
Semillon	10,409	7,882	-24%
Gewürztraminer	2,415	2,401	-1%
Viognier	2,799	2,320	-17%
Verdelho	2,023	1,930	-5%
Muscat à Petits Grains Blancs	2,594	1,535	-41%
Chenin blanc	1,280	1,102	-14%
Fiano	479	653	36%
Vermentino	933	589	-37%
Prosecco	440	534	21%
Grüner Veltliner	239	186	-22%
Marsanne	121	124	3%
Roussanne	87	91	4%
Other white	1,232	2,947	139%
White Total	253,270	253,818	0%
Grand Total	661,984	619,400	-6%



State summary 2024

Current plantings by variety and year planted – red winegrapes

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Aglianico	7	1	0	1	10	10%
Alicante Bouschet	16	0	0	0	16	0%
Barbera	22	0	1	0	24	0%
Cabernet Franc	134	1	0	2	136	2%
Cabernet Sauvignon	17,128	84	38	24	17,273	0%
Carignan	13	0	0	0	14	0%
Carmenere	4	0	0	0	4	0%
Cinsault	10	0	1	0	11	0%
Dolcetto	10	0	1	0	11	0%
Durif (Petite Sirah)	79	1	0	4	84	5%
Gamay	7	3	5	1	16	6%
Graciano	13	0	0	0	13	0%
Grenache	1641	55	32	35	1763	2%
Lagrein	10	0	0	0	10	0%
Malbec	375	7	7	0	389	0%
Mataro (Mourvedre)	684	6	5	12	706	2%
Mencia	8	1	1	0	9	0%
Merlot	3378	3	0	1	3382	0%
Meunier (Pinot Meunier)	23	0	1	0	24	0%
Montepulciano	58	1	0	1	60	2%
Muscat A Petit Grains Rouge	5	0	0	0	5	0%
Nebbiolo	18	0	3	2	22	9%
Nero d'Avola	46	2	4	3	54	6%
Petit Verdot	595	0	0	0	595	0%
Pinot Noir	1600	75	59	45	1,779	3%
Rubired	43	0	5	0	49	0%
Ruby Cabernet	113	0	0	0	113	0%
Sagrantino	6	0	0	0	7	0%
Sangiovese	169	1	16	9	195	5%
Saperavi	11	1	0	2	13	15%
Shiraz	27794	172	103	26	28,095	0%
Tannat	2	0	0	0	2	0%
Tempranillo	291	8	8	3	310	1%
Touriga	55	0	0	0	55	0%
Zinfandel	26	0	0	0	26	0%
Other Red	410	13	22	2	446	0%
Red winegrapes Total	54,805	436	310	172	55,722	0%

Source:
Vinehealth
Australia

State summary 2024

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

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
White winegrapes						
Arneis	7	0	1	0	7	0%
Chardonnay	7,954	6	34	11	8,005	0%
Chenin Blanc	92	0	0	0	92	0%
Colombard	690	0	0	0	690	0%
Doradillo	30	0	0	0	30	0%
Fiano	80	13	44	14	150	9%
Grenache Blanc	6	0	2	1	9	11%
Gruner Veltliner	22	1	0	3	26	12%
Marsanne	9	0	0	0	9	0%
Muscadelle (Tokay)	15	0	0	0	15	0%
Muscat A Petit Grains Blanc (White Frontignac)	152	0	0	0	152	0%
Muscat Gordo Blanco	791	0	0	0	791	0%
Palomino	8	0	0	0	8	0%
Pedro Ximenez	8	0	0	0	8	0%
Pinot Blanc	2	0	0	0	2	0%
Pinot Gris	1,132	16	14	27	1,189	2%
Prosecco	5	1	6	9	21	43%
Riesling	2,186	13	20	16	2,235	1%
Roussanne	15	0	0	0	16	0%
Sauvignon Blanc	2,161	26	42	65	2,294	3%
Savagnin	17	0	3	0	20	0%
Semillon	658	0	2	1	660	0%
Sultana	84	0	0	0	84	0%
Traminer (Gewurztraminer)	147	0	0	0	147	0%
Trebbiano	12	0	0	0	12	0%
Verdelho	104	0	0	0	104	0%
Vermentino	35	0	0	0	35	0%
Viognier	247	0	0	14	262	5%
Other White	341	11	31	5	389	1%
White winegrapes Total	17,009	88	199	166	17,461	1%
Unknown variety	1,361	0	0	0	1,361	0%
Rootstock	39	0	0	0	39	0%
Multi-purpose red	60	0	0	0	60	0%
Multi-purpose white	64	0	0	0	64	0%
Table grapes - red	15	0	1	0	16	0%
Table grapes - white	9	0	0	0	9	0%
Total all varieties	73,362	524	509	337	74,732	0%

Source:
Vinehealth
Australia

State summary 2024

Current plantings by zone, region and year planted

Zone	Region	Area (hectares)				Total area (Ha)	% planted in 2023
		Pre-2021	2021	2022	2023		
Barossa	Barossa Valley	11,506	106	41	66	11,718	1%
	Barossa zone - other	212	0	0	0	212	0%
	Eden Valley	2,256	17	6	13	2,292	1%
	Total for Barossa	13,974	123	47	79	14,223	1%
Far North	Southern Flinders Ranges	164	0	10	0	174	0%
	Total for Far North	164	0	10	0	174	0%
Fleurieu	Currency Creek	1,095	14	8	0	1,118	0%
	Fleurieu zone - other	154	0	0	0	154	0%
	Kangaroo Island	143	0	0	1	144	0%
	Langhorne Creek	5,741	16	20	0	5,777	0%
	McLaren Vale	7,245	56	48	34	7,383	1%
	Southern Fleurieu	447	0	0	0	447	0%
	Total for Fleurieu	14,825	85	77	34	15,021	0%
Limestone Coast	Coonawarra	5,681	23	22	6	5,731	0%
	Limestone Coast zone - other	1,463	7	18	31	1,520	2%
	Mount Benson	502	0	4	1	506	0%
	Mount Gambier	249	0	0	0	249	0%
	Padthaway	3,915	18	38	10	3,982	0%
	Robe	599	2	0	0	602	0%
	Wrattonbully	2,541	32	17	10	2,600	0%
Total for Limestone Coast	14,950	82	100	57	15,190	0%	
Lower Murray	Lower Murray zone - other	366				366	0%
	Riverland	19,932	148	157	89	20,326	0%
	Total for Lower Murray	20,298	148	157	89	20,693	0%
Mount Lofty Ranges	Adelaide Hills	3,574	24	53	53	3,705	1%
	Adelaide Plains	332	2	0	0	333	0%
	Clare Valley	4,817	58	65	23	4,963	1%
	Mount Lofty Ranges zone - other	355	1	0	1	357	0%
	Total for Mount Lofty Ranges	9,079	84	118	77	9,358	1%
The Peninsulas	The Peninsulas	71	2	0	0	73	1%
	Total for The Peninsulas	71	2	0	0	73	1%
	Total for all GIs	73,362	524	509	337	74,732	1%

Source:
Vinehealth
Australia

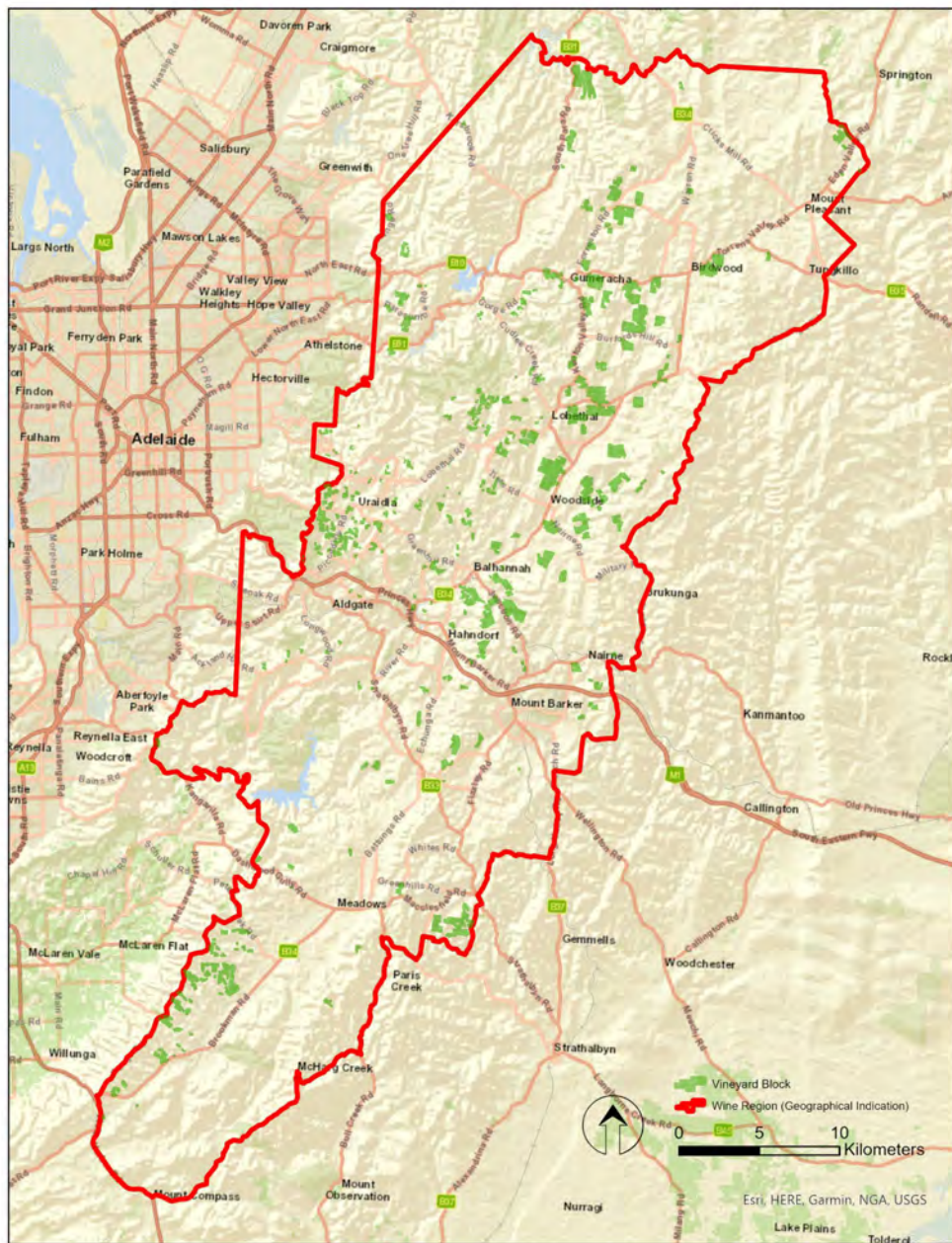
State summary 2024

Number of registered owners by region and property size

Zone	GI Region	< 10 ha		10 - <25 ha		25 - <50 ha		50 - <100 ha		100+ ha		Total	
		Area (ha)	# reg owners	Area (ha)	# reg owners	Area (ha)	# reg owners	Area (ha)	# reg owners	Area (ha)	# reg owners	Area (ha)	# registered owners
Barossa	Barossa Valley	1,297	316	2,147	136	2,525	75	1,578	24	4,171	17	11,718	568
	Barossa zone - other	17	3	10	1			60	1	126	1	212	6
	Eden Valley	390	89	499	33	468	14	306	4	629	4	2,292	144
Far North	Southern Flinders Ranges	13	4	81	5	30	1	51	1			174	11
Fleurieu	Currency Creek	70	12	172	11	149	4	65	1	661	2	1,118	30
	Fleurieu zone - other	24	7	33	2			97	1			154	10
	Kangaroo Island	106	20	38	3							144	23
Limestone Coast	Langhorne Creek	91	21	309	19	767	22	1,064	16	3,545	13	5,777	91
	McLaren Vale	1,547	363	1,728	110	1,426	43	749	10	1,933	8	7,383	534
	Southern Fleurieu	94	28	33	3	227	6	92	1			447	38
	Coonawarra	261	47	525	31	560	16	1,001	15	3,384	13	5,731	122
	Limestone Coast zone - other	35	10	40	3	60	2	52	1	1,332	6	1,520	22
	Mount Benson	24	4	85	5	27	1	212	3	159	1	506	14
	Mount Gambier	49	15	22	2	80	2	98	1			249	20
Lower Murray	Padthaway	23	3	34	3	277	7	777	10	2,871	12	3,982	35
	Robe	8	2	40	2	81	2	54	1	419	2	602	9
	Wrattonbully	60	11	218	13	490	12	566	8	1,265	5	2,600	49
	Lower Murray zone - other	47	11	203	11	117	4					366	26
	Riverland	2,430	514	3,740	244	2,862	83	2,541	36	8,753	34	20,326	911
Mt Lofty Ranges	Adelaide Hills	746	188	983	57	866	26	823	12	287	2	3,705	285
	Adelaide Plains	127	43	57	4	149	4					333	51
	Clare Valley	637	168	730	44	752	22	690	10	2,153	12	4,963	256
	Mt Lofty Ranges zone - other	85	26	75	5	90	3			108	1	357	35
The Peninsulas	The Peninsulas	8	3	32	3	33	1					73	7
Totals by size category		8,188	1,908	11,836	750	12,035	350	10,878	156	31,795	133		
Totals for SA												74,732	3,182

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 2024

Regional Summary Report

Adelaide Hills Wine Region

Wine Australia July 2024

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

Adelaide Hills Wine Region



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Adelaide Hills

Vintage overview

VINTAGE REPORT

A lingering summer ensured minimal disease and optimal ripening conditions for Vintage 2024 for the Adelaide Hills. However, conditions during flowering severely impacted the season outcome for grape growers as poor set generally resulted in diminished crops.

The forecast for the 2023/24 season was for hotter and drier El Niño conditions, which was initially confirmed by a warm and dry September and an earlier budburst than for the previous seasons in the 2020s. This followed winter rainfall which was 90 per cent of the Long-Term Average (LTA) for Lenswood (556mm) and included an unusually wet June when 200 per cent of the LTA (272mm) was recorded.

Optimal soil moisture profiles in spring ensured strong shoot growth and flower development, despite cool conditions. However, cold conditions persisted during flowering resulting in poor set, particularly in early flowering varieties. This, combined with above average rainfall in December and January (150 per cent of average) resulted in significant challenges with downy mildew and Botrytis infections. Vineyards with good spray programs (which included preventatives for powdery mildew) and with good coverage had minimal issues.

Fortunately, no rainfall in February and low rainfall in March meant that the harvest had no disease issues. Good-sized canopies and soil moisture management ensured that the only heatwave in mid-March (35-37°C for six days) resulted in good balances of malic and tartaric acid and excellent pH. Pristine fruit meant that winemakers are very pleased with the quality of Vintage 2024 albeit with a smaller than desired harvest.

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 2024 was 14,275 tonnes, down by 21 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Adelaide Hills has been 19,346 tonnes, making this year's crush 26 per cent below the five-year average.

There were 81 respondents to the survey who reported crushing grapes from the Adelaide Hills in 2024, compared with 83 in 2023.

The total value of winegrapes in 2024 was \$32 million, lower than last year, with the decreased production partly offset by an increase in the average purchase value of grapes, which was up by 3 per cent from \$2,189 to \$2,251 per tonne.

There were increases in average prices for the two largest varieties: Chardonnay up by 3 per cent to \$2,365 per tonne and Sauvignon Blanc up by 4 per cent to \$2,071 per tonne. On the other hand, Pinot Noir decreased by 3 per cent to \$2,476 per tonne.

The price dispersion data shows an upward shift in prices paid, with 78 per cent of all grapes being purchased at \$2000 per tonne or above compared with 67 per cent in 2023.

There were 53 hectares of new vines planted in the region in the 2023–24 season, the same as the previous season. Almost half of the new plantings were Pinot Noir (24 hectares).

The total vineyard area in the Adelaide Hills as at 30 April 2024 was 3,705 hectares—almost identical to 2023, and 125 hectares less than it was 5 years ago. The average vineyard size in Adelaide Hills is 11.7 hectares, compared with the state average of 16.1 hectares.

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	11	\$32,754	\$2,909	8%	8	42%	19	\$56,611
Cabernet Franc	1				32	98%	33	\$75,179
Cabernet Sauvignon	67				80	54%	146	\$195,438
Malbec	4						4	\$6,715
Merlot	207	\$177,556	\$856	-13%	25	11%	232	\$198,790
Montepulciano	18	\$40,537	\$2,248	1%	2	8%	20	\$43,932
Nebbiolo	15	\$41,848	\$2,770	24%	36	71%	52	\$142,919
Nero d'Avola	15	\$29,885	\$2,018	0%			15	\$29,885
Pinot Meunier	66	\$169,665	\$2,570	-1%	1	1%	67	\$170,951
Pinot Noir	2,474	\$6,116,864	\$2,476	-3%	763	24%	3,237	\$8,005,991
Ruby Cabernet					6	100%	6	\$6,370
Sangiovese	69	\$156,341	\$2,260	16%	11	13%	80	\$180,118
Shiraz	343	\$619,564	\$1,805	-2%	522	60%	865	\$1,561,253
Tempranillo	79	\$189,308	\$2,409	6%	14	16%	93	\$224,060
Other red	81	\$231,375	\$2,852	10%	31	28%	112	\$284,137
Red Total	3,450	\$7,902,720	\$2,293	-1%	1,530	31%	4,980	\$11,182,347

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

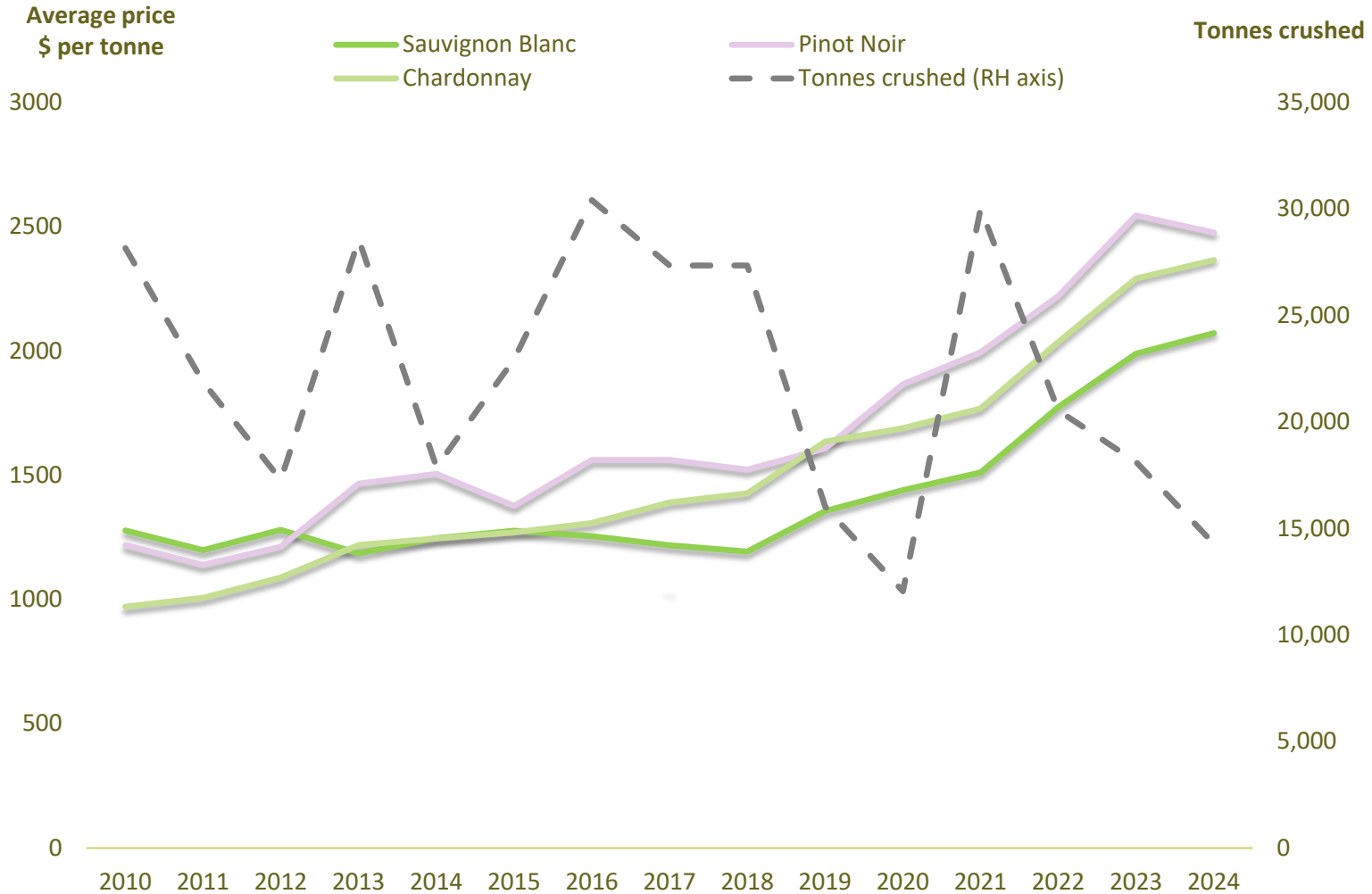
Winegrape intake summary table – white winegrapes

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	2,873	\$6,799,084	\$2,365	3%	938	25%	3,811	\$9,017,723
Fiano	12	\$31,650	\$2,622	0%			12	\$31,650
Gewürztraminer	49	\$101,469	\$2,079	3%	2	4%	51	\$105,523
Grüner Veltliner	23	\$54,883	\$2,388	9%	61	73%	84	\$200,571
Pinot Gris/Grigio	792	\$1,740,990	\$2,198	3%	535	40%	1,328	\$2,917,726
Prosecco	31				25	45%	57	\$66,567
Riesling	157	\$373,966	\$2,384	5%	40	20%	197	\$469,266
Sauvignon Blanc	2,117	\$4,384,253	\$2,071	4%	1,447	41%	3,565	\$7,382,391
Semillon	29				12	29%	41	\$88,250
Vermentino	18						18	\$27,498
Viognier	23	\$36,970	\$1,592	20%	7	22%	30	\$47,558
Other white	27	\$52,854	\$1,961	-6%	76	74%	103	\$204,698
White Total	6,152	\$13,703,253	\$2,227	5%	3,143	34%	9,295	\$20,559,422
Grand Total	9,601	\$21,605,973	\$2,251	3%	4,674	33%	14,275	\$31,741,769

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)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera					11	11
Cabernet Franc					1	1
Cabernet Sauvignon		8	18	35	6	67
Malbec				3	1	4
Merlot	52		151		4	207
Montepulciano					18	18
Nebbiolo					15	15
Nero d'Avola				4	11	15
Pinot Meunier				21	45	66
Pinot Noir				232	2,242	2,474
Sangiovese				14	56	69
Shiraz		10	110	105	118	343
Tempranillo				3	76	79
Other red					81	81
Red Total	52	18	279	417	2,684	3,450

Adelaide Hills

Price dispersion – purchased grapes (white)

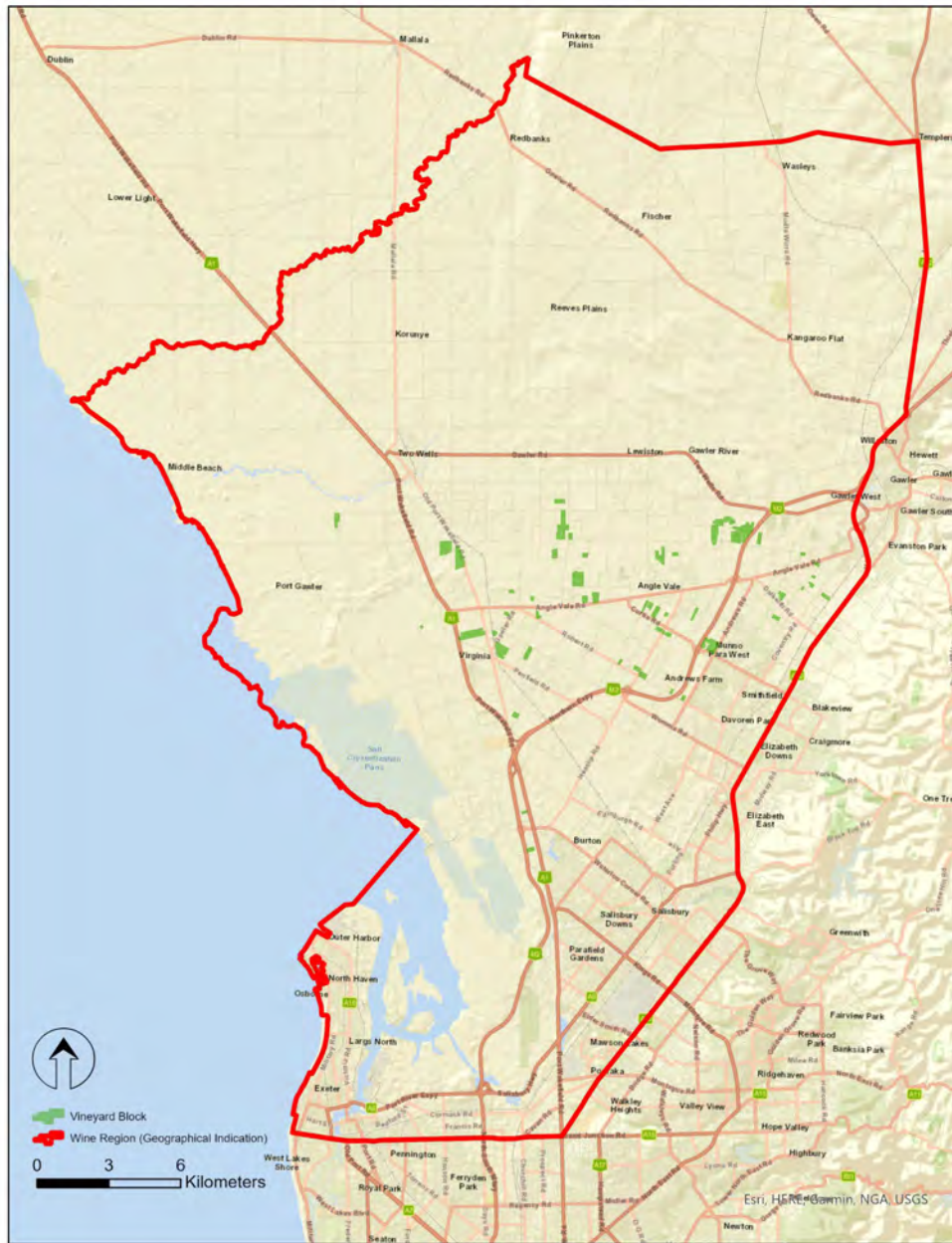
Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
White						
Chardonnay				247	2,626	2,873
Fiano					12	12
Gewürztraminer				5	44	49
Grüner Veltliner					23	23
Pinot Gris/Grigio			15	94	683	792
Prosecco			20	11		31
Riesling				11	146	157
Sauvignon Blanc			11	858	1,246	2,115
Semillon					29	29
Vermentino			8	10		18
Viognier				23	0	23
Other white				12	15	27
White Total			54	1,271	4,825	6,149
Total purchased	52	18	333	1,688	7,508	9,599

Adelaide Hills

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Barbera	6	0	1	0	7	0%
Cabernet Franc	6	0	0	2	7	29%
Cabernet Sauvignon	182	0	0	0	182	0%
Dolcetto	2	0	1	0	3	0%
Gamay	7	3	5	1	16	6%
Grenache	2	1	0	0	3	0%
Malbec	4	0	0	0	4	0%
Mencia	2	1	0	0	2	0%
Merlot	106	0	0	0	106	0%
Meunier (Pinot Meunier)	19	0	1	0	20	0%
Montepulciano	5	0	0	0	5	0%
Nebbiolo	13	0	3	2	18	11%
Nero d'Avola	4	0	0	0	4	0%
Pinot Noir	688	14	16	24	742	3%
Sangiovese	16	0	0	1	16	6%
Shiraz	367	0	4	0	372	0%
Tempranillo	33	0	0	0	33	0%
Other Red	15	1	1	1	17	6%
Red winegrapes Total	1,476	19	32	30	1,557	2%
White winegrapes						
Arneis	7	0	1	0	7	0%
Chardonnay	814	2	8	7	831	1%
Fiano	8	0	3	0	12	0%
Gruner Veltliner	20	1	0	0	21	0%
Pinot Blanc	2	0	0	0	2	0%
Pinot Gris	252	0	2	8	263	3%
Prosecco	5	0	0	0	5	0%
Riesling	39	0	4	0	44	0%
Sauvignon Blanc	832	1	0	7	840	1%
Savagnin	6	0	0	0	6	0%
Semillon	29	0	0	0	29	0%
Traminer (Gewurztraminer)	15	0	0	0	15	0%
Viognier	15	0	0	0	15	0%
Other White	13	0	4	0	16	0%
White winegrapes Total	2,057	5	22	23	2,106	1%
Unknown variety	39	0	0	0	39	0%
Rootstock	2	0	0	0	2	0%
All varieties Total	3,574	24	53	53	3,705	1%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

Adelaide Plains Wine Region

Wine Australia July 2024

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



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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	94						94	\$39,993
Durif	3						3	\$5,430
Graciano	2						2	\$4,088
Grenache	85				20	19%	105	\$105,230
Mataro/Mourvedre	67						67	\$120,024
Montepulciano	3				1	25%	4	\$7,301
Pinot Noir	95						95	\$129,718
Ruby Cabernet					2	100%	2	\$2,000
Sangiovese	3						3	\$4,306
Shiraz	735	\$586,408	\$798	-5%	5	1%	740	\$590,702
Tempranillo	7						7	\$13,444
Red Total	1,093	\$993,671	\$909	2%	29	3%	1,122	\$1,022,235
White								
Chardonnay	120	\$89,568	\$748	0%			120	\$89,568
Muscat Gordo Blanco					7	100%	7	\$6,620
Pinot Gris/Grigio	154						154	\$192,663
Sauvignon Blanc	140						140	\$166,568
Viognier	40						40	\$58,522
Other white	13				3	19%	16	\$18,510
White Total	466	\$522,531	\$1,121	-15%	10	2%	476	\$532,450
Grand Total	1,560	\$1,516,202	\$972	-2%	38	2%	1,598	\$1,554,685

There were 11 respondents to the survey who reported crushing grapes from the Adelaide Plains in 2024, compared with 10 in 2023.

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

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Cabernet Sauvignon	94					94
Durif					3	3
Graciano				2		2
Grenache			85			85
Mataro/Mourvedre				67		67
Montepulciano				3		3
Pinot Noir			63	32		95
Sangiovese				3		3
Shiraz	188	343	204			735
Tempranillo				7		7
Red Total	282	343	352	114	3	1,093
White						
Chardonnay	54	17	49			120
Pinot Gris/Grigio			154			154
Sauvignon Blanc	20		120			140
Viognier			40			40
Other white			13			13
White Total	74	17	375			466
Total purchased	356	360	728	114	3	1,593

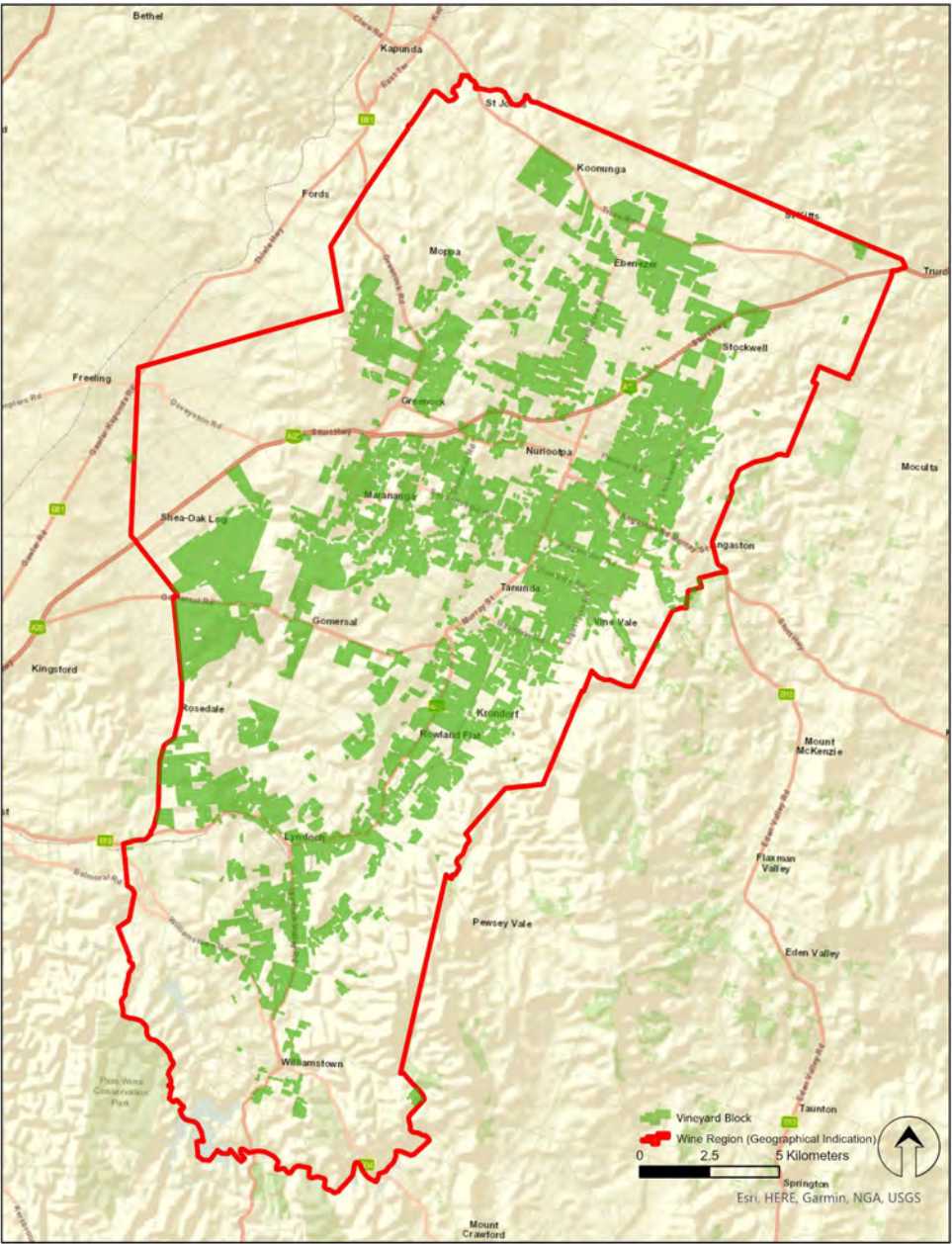
Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Adelaide Plains

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	46	0	0	0	46	0%
Grenache	19	0	0	0	19	0%
Mataro (Mourvedre)	7	0	0	0	7	0%
Merlot	13	0	0	0	13	0%
Pinot Noir	13	0	0	0	13	0%
Shiraz	127	2	0	0	129	0%
Other Red	13	0	0	0	13	0%
Red winegrapes Total	238	2	0	0	239	0%
White winegrapes						
Chardonnay	25	0	0	0	25	0%
Pinot Gris	32	0	0	0	32	0%
Sauvignon Blanc	16	0	0	0	16	0%
Other White	10	0	0	0	10	0%
White winegrapes Total	83	0	0	0	83	0%
Unknown variety	11	0	0	0	11	0%
All varieties Total	332	2	0	0	333	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

Barossa Valley Wine Region

Wine Australia July 2024

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



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Barossa Valley

Vintage overview

VINTAGE REPORT

After a long and late 2023 vintage, 2024 vintage proved to be quite the opposite.

Despite a reasonable break at the end of the 2023 harvest, the Barossa Valley did not receive the soaking winter rains growers had hoped for. Winter was 28 per cent below average rains and spring was even drier with only 48 per cent of average.

The dry winter and spring made the vines work during the early part of the growing season, and bud burst started in September, three weeks earlier than the year before. With dry springs came clear and cold and frosty nights, particularly in September and October. Some vineyards had significant damage that influenced their subsequent yield.

Windy weather and a heat spike in November caused issues with some vineyards where this was coincident with flowering and hence fruit set.

With some rain, and slightly cooler than average days, December and early January saw vines flourish and move quickly into their ripening phase. Veraison in many vineyards was a month earlier than 2023. January finished with average temperatures, but in February, with no rain and the temperature 2°C above average, vines ripened quickly, and harvest was away. Whites ripened quickly, retaining good fragrance and natural acids early. Reds, with small berries, show intensity and vibrancy.

The early season was a blessing for many who had already picked before an unseasonal heatwave in early March. Most varieties and vineyards were picked before Easter (end of March) with only the later ripening varieties Grenache and Mataro being harvested into April.

In 2024, quality across the board looks exceptional, although yields are variable. Particular standouts are Grenache and Cabernet, but that's not to take away from some exceptional parcels of Riesling, Semillon and Shiraz.

Louisa Rose on behalf of Barossa Australia.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Barossa Valley winegrapes in 2024 (including Barossa zone – other) was 50,145 tonnes, down by 24 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Barossa Valley has been 49,427 tonnes, making this year's crush 1 per cent above the five-year average.

There were 97 respondents to the survey who reported crushing grapes from the Barossa Valley in 2024, compared with 83 in 2023.

The total value of winegrapes in 2024 was \$91 million, compared with \$127 million in 2023, a decrease of 28 per cent. The overall average value declined by 5 per cent from \$1,897 to \$1,803 per tonne.

The major red varieties continued to decline in average value, with Shiraz down 6 per cent compared with 2023 to \$1866 per tonne, while Cabernet Sauvignon was down 5 per cent to \$1766 per tonne. NB These prices relate to Barossa Valley only. Grenache had the highest average value of the reds at \$2354 per tonne but declined by 2 per cent year-on-year.

The price dispersion data shows a downward shift in prices paid, with 41 per cent of red varieties purchased at \$2000 per tonne or above compared with 49 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in the Barossa Valley as at 30 April 2024 was 11,930 hectares, including 212 hectares in Barossa zone – other. This is virtually the same as last year and about 228 hectares more than it was 5 years ago. The average vineyard size in Barossa Valley is 14.2 hectares, compared with the state average of 16.1 hectares.

There were 66 hectares of new vines planted in the region in the 2023–24 season (including top-working and replacements) compared with 41 in the previous season. Of these, the main varieties planted were Shiraz and Grenache (both 24 hectares).

Barossa Valley

Barossa Valley* winegrape intake summary table – red varieties

* Includes Barossa zone other – 673 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	1						1	\$2,664
Cabernet Franc	22	\$22,333	\$1,005	-4%	19	47%	42	\$41,794
Cabernet Sauvignon	3,210	\$5,662,837	\$1,764	-5%	2,644	45%	5,854	\$10,328,567
Durif	47	\$76,527	\$1,637	-4%	26	36%	73	\$119,346
Graciano	15	\$25,410	\$1,676	20%	8	35%	23	\$38,970
Grenache	2,315	\$5,449,701	\$2,354	-2%	1,405	38%	3,720	\$8,756,850
Lagrein					0	100%	0	\$180
Malbec	18	\$32,799	\$1,811	-19%	87	83%	105	\$190,047
Mataro/Mourvedre	1,007	\$2,308,292	\$2,293	3%	677	40%	1,684	\$3,861,069
Merlot	301	\$359,954	\$1,194	-16%	690	70%	992	\$1,184,514
Montepulciano	50	\$102,395	\$2,056	2%	43	46%	93	\$190,554
Muscat à Petits Grains Rouges	3				18	87%	20	\$17,655
Nebbiolo					5	100%	5	\$13,962
Nero d'Avola	10	\$19,077	\$1,956	9%	31	76%	41	\$80,391
Petit Verdot	18				67	79%	85	\$149,874
Pinot Meunier					4	100%	4	\$8,094
Pinot Noir	118	\$180,454	\$1,533	24%	16	12%	133	\$207,910
Sangiovese	252	\$333,645	\$1,321	-1%	65	21%	318	\$420,124
Shiraz	18,381	\$34,277,032	\$1,865	-6%	14,246	44%	32,627	\$60,575,831
Tempranillo	255	\$451,186	\$1,772	-5%	71	22%	326	\$577,218
Touriga Nacional	17				101	85%	119	\$143,767
Other red	244	\$412,479	\$1,692	-4%	128	34%	372	\$608,673
Red Total	26,284	\$49,771,542	\$1,894	-5%	20,352	44%	46,636	\$87,518,055

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

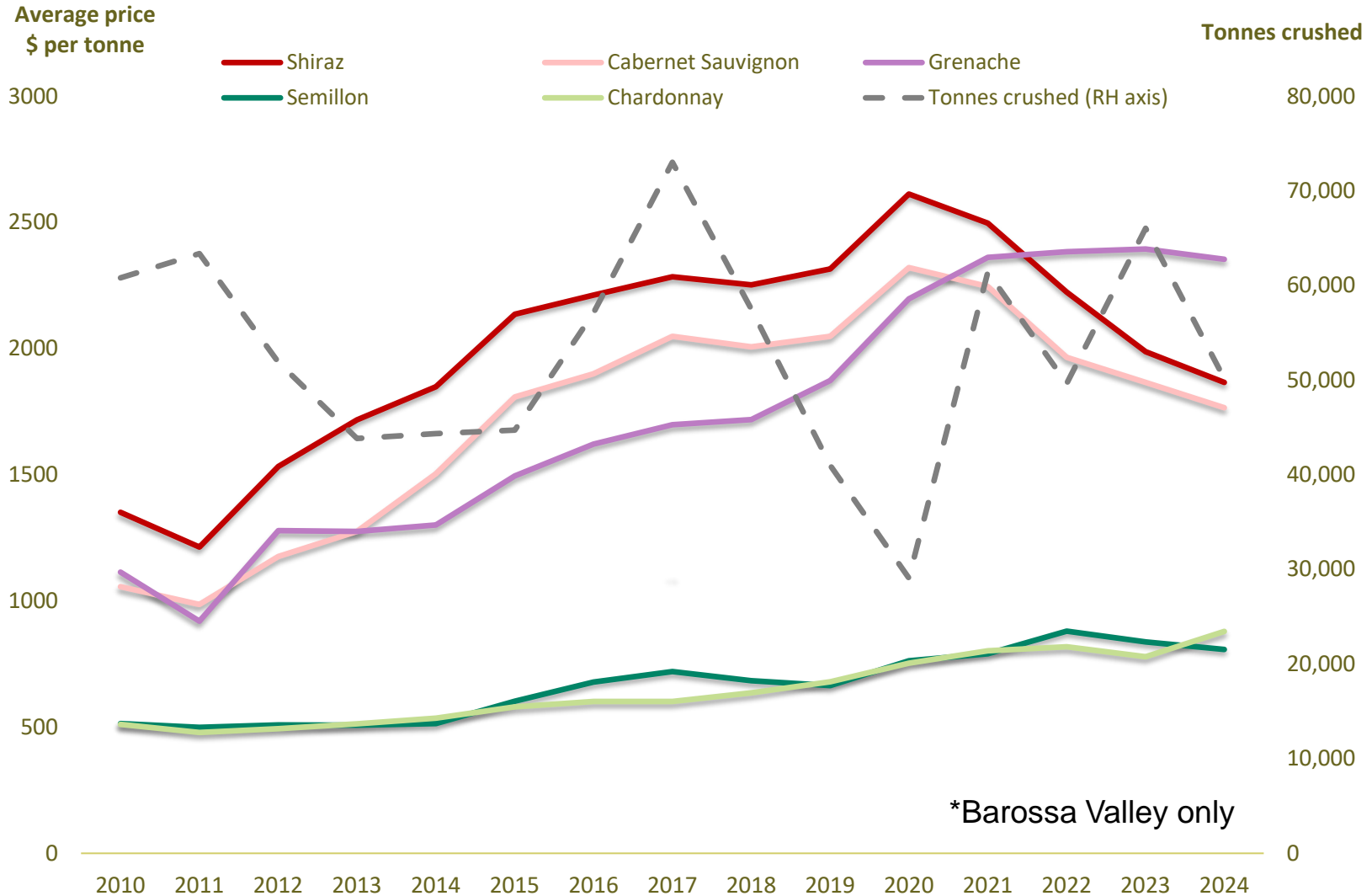
* Includes Barossa zone other – 22 tonnes

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	1,038	\$912,483	\$879	13%	99	9%	1,137	\$1,000,728
Chenin blanc	5				16	74%	21	\$35,110
Fiano	24				7	23%	31	\$55,695
Marsanne	15	\$28,202	\$1,851	-0%	56	79%	72	\$132,519
Muscat à Petits Grains Blancs	119	\$103,798	\$874	-10%	11	8%	130	\$113,397
Pinot Gris/Grigio	133	\$138,332	\$1,041	6%	41	23%	174	\$180,586
Prosecco	0						0	\$281
Riesling	316	\$273,885	\$867	-0%	88	22%	405	\$358,076
Roussanne	20	\$38,954	\$1,930	13%	11	35%	31	\$59,668
Sauvignon Blanc	204				21	9%	226	\$210,657
Semillon	555	\$470,353	\$848	1%	225	29%	780	\$661,205
Vermentino	70				7	9%	77	\$73,586
Viognier	211	\$256,183	\$1,214	-10%	61	22%	272	\$329,640
Other white	65	\$79,720	\$1,217	-2%	90	58%	155	\$194,727
White Total	2,776	\$2,612,624	\$941	3%	733	21%	3,509	\$3,405,873
Grand Total	29,060	\$52,384,167	\$1,803	-5%	21,085	42%	50,145	\$90,923,929

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 only

Barossa Valley

Price dispersion – purchased grapes (red)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera					1	1
Cabernet Franc		6	11	3		20
Cabernet Sauvignon		282	1,052	778	1,096	3,207
Durif			20	11	15	47
Graciano				15		15
Grenache	13		214	291	1,797	2,315
Malbec			3	4	11	18
Mataro/Mourvedre			16	217	774	1,007
Merlot		157	59	32	52	301
Montepulciano				22	27	50
Muscat à Petits Grains Rouges		2	1			3
Nero d'Avola				7	2	10
Petit Verdot			6	4	8	18
Pinot Noir			70		48	118
Sangiovese			210	6	37	252
Shiraz		3,114	3,930	4,685	6,647	18,377
Tempranillo			16	193	46	255
Touriga Nacional	6			11		17
Other red		4	108	25	107	244
Red Total	19	3,566	5,716	6,307	10,666	26,275

Barossa Valley

Price dispersion – purchased grapes (white)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
White						
Chardonnay	6	402	598	32		1,038
Chenin blanc			3		2	5
Fiano				24		24
Marsanne				5	10	15
Muscat à Petits Grains Blancs		55	64			119
Pinot Gris/Grigio		34	77	22		133
Prosecco			0			0
Riesling		297	6	11	2	316
Roussanne				12	8	20
Sauvignon Blanc		3	192	9		204
Semillon	41	330	159	7	18	555
Vermentino		56		14		70
Viognier			203	7	1	211
Other white		11	34	19	2	65
White Total	47	1,188	1,336	162	43	2,776
Total purchased	66	4,754	7,051	6,469	10,710	29,051

Barossa Valley

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

* Includes Barossa zone other – 208 hectares (red)

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Aglianico	2	1	0	0	3	0%
Alicante Bouschet	16	0	0	0	16	0%
Barbera	3	0	0	0	3	0%
Cabernet Franc	24	0	0	0	24	0%
Cabernet Sauvignon	1,663	17	1	1	1,682	0%
Carignan	8	0	0	0	8	0%
Cinsault	6	0	0	0	6	0%
Durif (Petite Sirah)	20	0	0	0	20	0%
Graciano	7	0	0	0	7	0%
Grenache	695	24	5	24	748	3%
Malbec	27	0	0	0	27	0%
Mataro (Mourvedre)	311	4	4	12	330	4%
Merlot	213	0	0	0	213	0%
Meunier (Pinot Meunier)	2	0	0	0	2	0%
Montepulciano	16	0	0	0	16	0%
Muscat A Petit Grains Rouge	2	0	0	0	2	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	29	0	0	0	29	0%
Sangiovese	27	0	0	4	31	13%
Saperavi	5	1	0	0	6	0%
Shiraz	7,622	57	26	24	7,729	0%
Tannat	2	0	0	0	2	0%
Tempranillo	78	0	0	2	79	3%
Touriga	17	0	0	0	17	0%
Zinfandel	13	0	0	0	13	0%
Other Red	34	2	0	0	36	0%
Red winegrapes Total	10,871	105	36	66	11,079	1%

Source:
Vinehealth
Australia

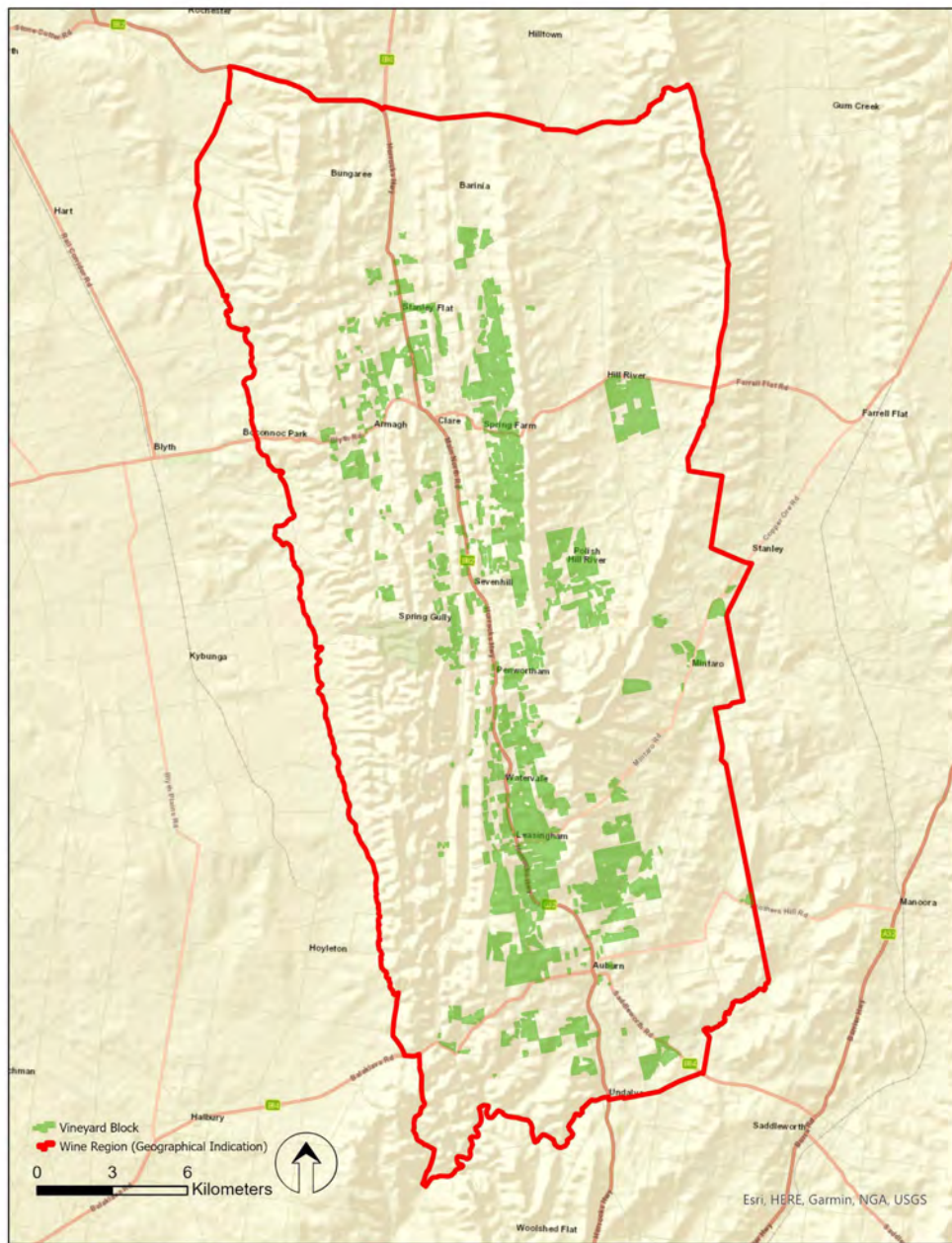
Barossa Valley

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

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

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
White winegrapes						
Chardonnay	228	0	0	0	228	0%
Chenin Blanc	11	0	0	0	11	0%
Fiano	5	0	0	0	5	0%
Grenache Blanc	3	0	2	0	5	0%
Marsanne	9	0	0	0	9	0%
Muscadelle (Tokay)	11	0	0	0	11	0%
Muscat A Petit Grains Blanc (White Frontignac)	38	0	0	0	38	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	116	0	0	0	116	0%
Roussanne	3	0	0	0	4	0%
Sauvignon Blanc	34	0	0	0	34	0%
Semillon	225	0	0	0	225	0%
Traminer (Gewurztraminer)	4	0	0	0	4	0%
Trebbiano	1	0	0	0	1	0%
Vermentino	8	0	0	0	8	0%
Viognier	41	0	0	0	41	0%
Other White	14	0	2	0	16	0%
White winegrapes Total	768	0	5	0	773	0%
Unknown variety	77	0	0	0	77	0%
Multi-purpose red	1	0	0	0	1	0%
Multi-purpose white	0	0	0	0	0	
Table red	0	0	0	0	0	
Total area	11,718	106	41	66	11,930	1%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

Clare Valley Wine Region

Wine Australia July 2024

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

Clare Valley Wine Region



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Clare Valley

Vintage overview

VINTAGE REPORT

Despite some challenges for growers this season, the 2024 vintage has produced wines with freshness, vibrancy and intensity of flavour.

The season began with a relatively dry winter and early spring, leading to an early budburst and flowering, followed by a wet period up until Christmas. This rain topped up the soil moisture profile ahead of a dry summer and autumn, providing close-to-perfect ripening weather with low disease pressure.

Riesling ripened relatively early and displays classic restraint and varietal precision, with red varieties benefiting from good levels of hang time.

While yields are down across the board this season, there are some solid Riesling yields in areas that escaped the frost which occurred in late October.

The regional crush is expected to be down on average due in part to the frost event which significantly impacted the southern end of the valley, and in part to the low demand for fruit.

Winemakers in the Clare Valley are pleased with the quality of both whites and reds as the 2024 wines begin to take shape.

Growers look forward to soaking winter rains to set up Clare Valley vineyards for the year ahead.

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

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Clare Valley winegrapes in 2024 was 16,498 tonnes, down by 28 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Clare Valley has been 19,321 tonnes, making this year's crush 15 per cent below the five-year average.

There were 45 respondents to the survey who reported crushing grapes from the Clare Valley in 2024, compared with 49 in 2023.

The total value of winegrapes in 2024 was \$26 million, compared with \$39 million in 2023, a decrease of 33 per cent. The overall average value declined by 8 per cent from \$1,688 in 2023 to \$1,558 per tonne.

Riesling overtook Shiraz as the largest variety for the first time in over a decade as the crush of Shiraz fell by nearly half. Riesling also recorded a 3 per cent increase in average price, to \$1,645 per tonne, whereas the average value for the major red varieties decreased, with Shiraz down by 14 per cent to \$1,610 per tonne and Cabernet Sauvignon down by 18 per cent to \$1,578 per tonne. This led to Riesling having the highest average value of the major varieties for the first time since 2005.

The price dispersion data shows a downward shift in prices paid, with 8 per cent of all grapes being purchased at \$2000 per tonne or above compared with 22 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in the Clare Valley as at 30 April 2024 was 4,963 hectares, a decrease of 191 hectares compared with the previous year and 53 less than it was in 2019. The average vineyard size in Clare Valley is 15 hectares, compared with the state average of 16.1 hectares.

There were 23 hectares of new vines planted in the region in the 2023–24 season (including top-working and replacements), compared with 65 in the previous season, with 8 hectares (one-third) being Riesling.

Clare Valley

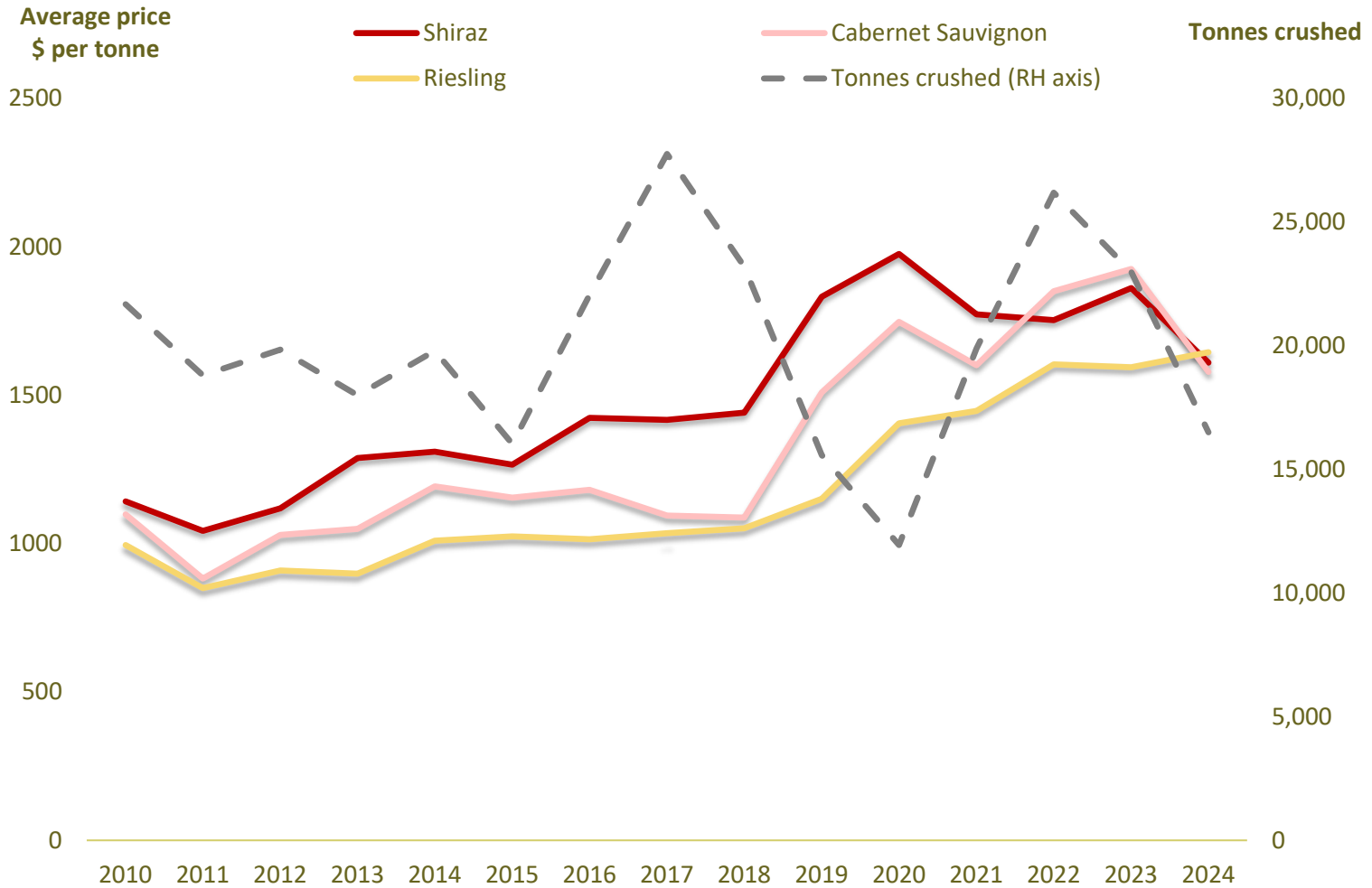
Winegrape intake summary table

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	6				7	53%	13	\$19,215
Cabernet Franc	17	\$25,511	\$1,465	6%	14	44%	31	\$45,906
Cabernet Sauvignon	828	\$1,306,868	\$1,578	-18%	914	52%	1,742	\$2,749,324
Grenache	117	\$198,975	\$1,707	1%	220	65%	337	\$574,497
Malbec	111	\$174,677	\$1,570	4%	172	61%	283	\$444,724
Mataro/Mourvedre	47	\$86,514	\$1,846	-2%	87	65%	134	\$247,756
Merlot	461	\$545,110	\$1,183	14%	84	15%	545	\$644,392
Montepulciano					8	100%	8	\$16,642
Nebbiolo					3	100%	3	\$7,957
Nero d'Avola					6	100%	6	\$10,591
Petit Verdot	73						73	\$118,120
Pinot Noir	3						3	\$3,486
Sangiovese	95	\$130,756	\$1,381	11%	180	66%	275	\$379,698
Shiraz	1,923	\$3,095,567	\$1,610	-14%	2,613	58%	4,536	\$7,301,467
Tempranillo	82	\$99,390	\$1,206	-18%	94	53%	176	\$212,467
Touriga Nacional					15	100%	15	\$25,129
Other red					6	100%	6	\$10,391
Red Total	3,763	\$5,794,001	\$1,540	-15%	4,423	54%	8,186	\$12,811,762
White								
Chardonnay	372	\$436,685	\$1,173	12%	154	29%	526	\$617,353
Fiano	38	\$64,005	\$1,668	0%	119	76%	158	\$262,926
Gewürztraminer	81	\$90,478	\$1,121	-9%	13	14%	94	\$104,933
Pinot Gris/Grigio	196	\$288,074	\$1,473	3%	392	67%	588	\$865,747
Riesling	3,658	\$6,017,355	\$1,645	3%	2,976	45%	6,634	\$10,913,318
Sauvignon Blanc	7				21	76%	28	\$19,415
Semillon	95	\$96,420	\$1,015	3%	35	27%	130	\$132,461
Verdelho					5	100%	5	\$6,256
Vermentino	15						15	\$22,095
Viognier					27	100%	27	\$38,483
Other white	2				105	98%	107	\$119,085
White Total	4,463	\$7,022,603	\$1,573	4%	3,848	46%	8,312	\$13,102,073
Grand Total	8,226	\$12,816,604	\$1,558	-8%	8,272	50%	16,498	\$25,913,834

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	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	Total purchased
Red						
Barbera				6		6
Cabernet Franc			11	4	2	17
Cabernet Sauvignon			83	696	50	828
Grenache			14	73	29	117
Malbec			23	88		111
Mataro/Mourvedre			14	20	13	47
Merlot		6	455			461
Petit Verdot			2	71		73
Pinot Noir			3			3
Sangiovese			38	57		95
Shiraz	29	72	246	1,466	110	1,923
Tempranillo	21		30	31		82
Red Total	50	79	919	2,511	204	3,763
White						
Chardonnay			372			372
Fiano				27	12	38
Gewürztraminer			70	11		81
Pinot Gris/Grigio			143	37	16	196
Riesling		8	857	2,380	413	3,658
Sauvignon Blanc		7				7
Semillon		34	61			95
Vermentino				15		15
Other white				2		2
White Total		48	1,503	2,471	441	4,463
Total purchased	50	127	2,422	4,983	645	8,226

Clare Valley

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Franc	13	0	0	0	13	0%
Cabernet Sauvignon	1,038	10	0	3	1,050	0%
Carmenere	4	0	0	0	4	0%
Grenache	71	6	1	1	78	1%
Malbec	83	0	7	0	90	0%
Mataro (Mourvedre)	33	0	0	0	33	0%
Merlot	196	0	0	0	196	0%
Montepulciano	2	0	0	0	2	0%
Nero d'Avola	7	0	0	0	7	0%
Petit Verdot	9	0	0	0	9	0%
Sangiovese	35	1	9	0	45	0%
Shiraz	1,914	21	8	0	1,944	0%
Tempranillo	32	2	0	0	34	0%
Touriga	3	0	0	0	3	0%
Zinfandel	3	0	0	0	3	0%
Other Red	25	0	0	0	25	0%
Red winegrapes Total	3,467	41	25	4	3,537	0%
White winegrapes						
Chardonnay	90	0	0	0	90	0%
Fiano	10	4	22	2	38	5%
Gruner Veltliner	2	0	0	2	4	50%
Muscat Gordo Blanco	2	0	0	0	2	0%
Pinot Gris	64	3	4	4	74	5%
Riesling	1,049	8	12	8	1,077	1%
Sauvignon Blanc	14	0	0	0	14	0%
Semillon	51	0	0	0	51	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	22	2	2	2	28	7%
White winegrapes Total	1,339	17	40	19	1,414	1%
Unknown variety	10	0	0	0	10	0%
Rootstock	1	0	0	0	1	0%
Table red	0	0	0	0	0	
Table white	0	0	0	0	0	
All varieties Total	4,817	58	65	23	4,963	1%

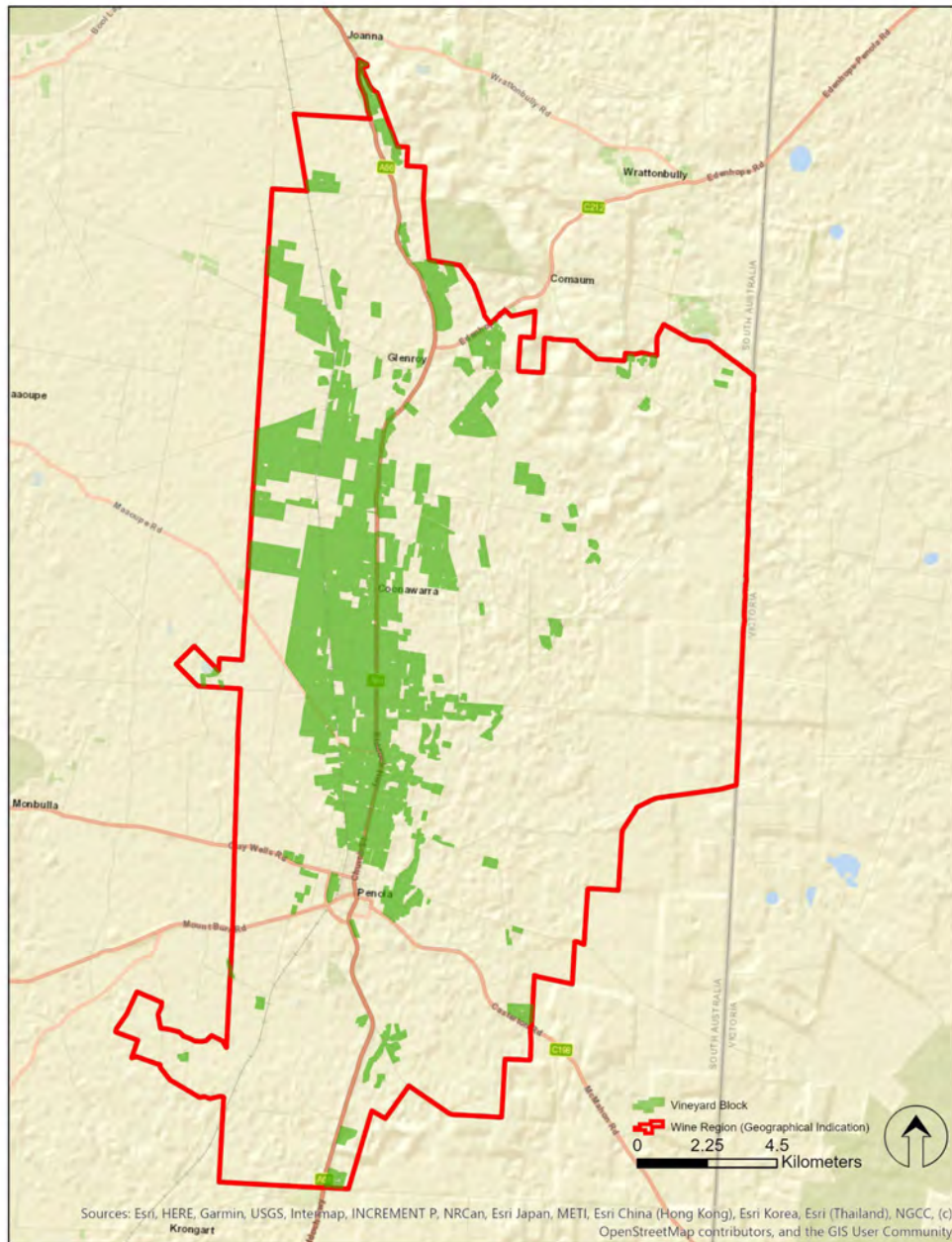
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2024

Regional Summary Report

Coonawarra Wine Region

Wine Australia July 2024



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 29th November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Coonawarra Wine Region



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Coonawarra

Vintage overview

VINTAGE REPORT

The 2024 Vintage in Coonawarra was unlike any other in the modern era.

The growing season was set up by an El Niño influence with a warmer and drier preceding winter. This resulted in early budburst and start to the season. Then, unexpectedly, Coonawarra had cooler and wetter weather in late spring and early summer, resulting in good shoot growth and healthy canopies.

There were some minor frost events throughout spring, but frost protection effectively mitigated fruit and vine damage. The cold wet weather in November and December, throughout flowering and fruit set, resulted in low to moderate yields.

The early onset of an incredibly strong Bonney Upwelling off the Limestone Coast (a local oceanographic phenomenon that drops ocean surface temperature considerably and restrains temperatures across the region) moderated the weather and had a particular impact on the night temperatures through December and well into the New Year.

With the New Year came changing weather patterns. Warm and dry conditions with cool nights were optimal for quality in the ripening phase.

Leading into harvest, Coonawarra experienced mild to warm and dry conditions, punctuated with bursts of heat, without any unwanted rain.

Vintage was slightly earlier than average, with the majority of reds harvested throughout late March and April.

Vintage 2024 points to an exceptionally good vintage with lovely firm acidity in the whites and a strong red wine vintage, with very intense colours, bold tannins and depth of varietal fruit flavours.

Coonawarra Vignerons Board (Coonawarra Grape and Wine Incorporated)

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Coonawarra winegrapes in 2024 was 27,143 tonnes, up by 33 per cent compared with the prior year's crush. Over the past five years, the average crush for the Coonawarra has been 34,035 tonnes, making this year's crush 20 per cent below the five-year (2019–2023) average.

There were 36 respondents to the survey who reported crushing grapes from the Coonawarra in 2024, compared with 38 in 2023.

The total value of winegrapes in 2024 was \$36 million, compared with \$26 million in 2023, an increase of 37 per cent. The overall average value increased by 3 per cent from \$1,289 in 2023 to \$1,331 per tonne.

The overall increase in average value was driven by Cabernet Sauvignon, (up by 8 per cent to \$1404 per tonne). On the other hand, Shiraz was down by 1 per cent to \$1489 per tonne. Despite the decrease, Shiraz had the highest average value of the major varieties for the second year in a row.

The price dispersion data shows very little change in the distribution of prices, with 32 per cent of all grapes being purchased at \$1500 per tonne or above compared with 31 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in Coonawarra as at 30 April 2024 was 5,731 hectares, a decrease of 58 hectares compared with the previous year and 5 more than it was in 2019. The average vineyard size in Coonawarra is 31 hectares, nearly double the state average of 16.1 hectares.

There were 6 hectares of new vines planted in the region in the 2023–24 season, all of which were Cabernet Sauvignon. There were 15 hectares of Cabernet Sauvignon and 7 hectares of Shiraz planted in the previous season.

Coonawarra

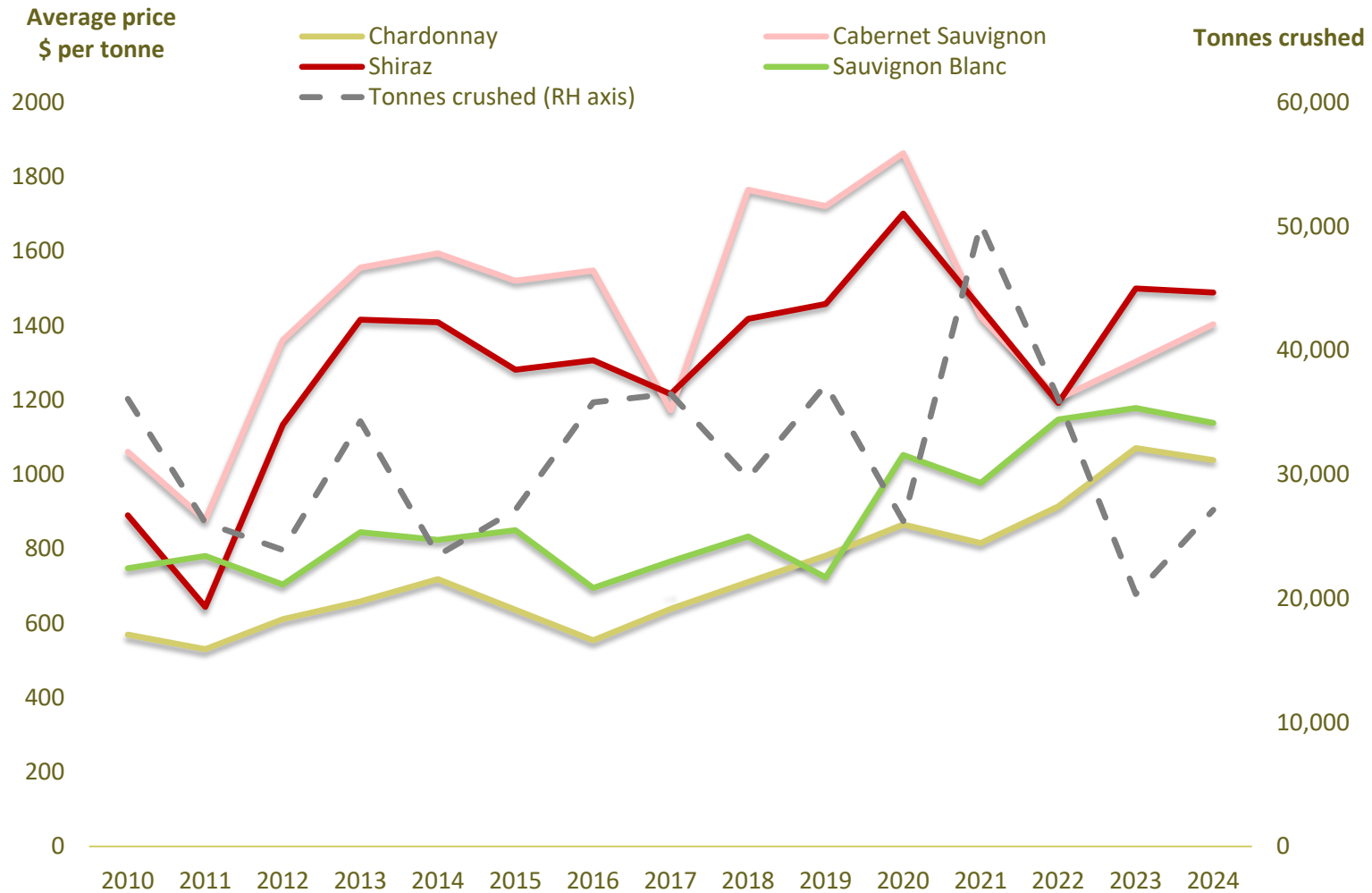
Winegrape intake summary table

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								
Barbera					4	100%	4	\$8,505
Cabernet Franc	24	\$29,713	\$1,260	0%	117	83%	141	\$177,323
Cabernet Sauvignon	4,175	\$5,860,171	\$1,404	8%	10,528	72%	14,703	\$20,639,402
Grenache					2	100%	2	\$3,160
Malbec	18				99	85%	117	\$198,356
Merlot	465	\$445,911	\$960	-10%	1,509	76%	1,974	\$1,894,102
Nebbiolo	6						6	\$12,000
Petit Verdot	17				53	76%	70	\$34,841
Pinot Meunier					3	100%	3	\$5,529
Pinot Noir	68	\$111,177	\$1,648	10%	161	70%	229	\$376,671
Sangiovese					7	100%	7	\$10,531
Shiraz	1,039	\$1,547,210	\$1,489	-1%	4,614	82%	5,653	\$8,418,884
Tempranillo					9	100%	9	\$17,005
Other red	6				0	8%	6	\$12,642
Red Total	5,816	\$8,056,807	\$1,385	3%	17,107	75%	22,923	\$31,808,951
White								
Chardonnay	691	\$717,478	\$1,039	-3%	1,786	72%	2,476	\$2,572,423
Gewürztraminer					11	100%	11	\$13,913
Riesling	93	\$87,953	\$943	-10%	424	82%	518	\$488,353
Sauvignon Blanc	265	\$301,309	\$1,138	-3%	685	72%	949	\$1,080,483
Semillon	34				218	87%	252	\$151,033
Viognier					1	100%	1	\$1,069
Other white					13	100%	13	\$22,719
White Total	1,082	\$1,126,918	\$1,041	-4%	3,138	74%	4,220	\$4,329,992
Grand Total	6,898	\$9,183,726	\$1,331	3%	20,245	75%	27,143	\$36,138,942

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			20	4		24
Cabernet Sauvignon	281	599	1,718	1,040	536	4,175
Malbec				18		18
Merlot	91	56	317	1		465
Nebbiolo					6	6
Petit Verdot	17					17
Pinot Noir			38	20	10	68
Shiraz			493	484	61	1,039
Other red					6	6
Red Total	389	654	2,586	1,567	619	5,816
White						
Chardonnay	18	153	519			691
Riesling		44	49			93
Sauvignon Blanc			265			265
Semillon		34				34
White Total	18	231	833			1,082
Total purchased	408	885	3,420	1,567	619	6,898

Coonawarra

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Franc	24	0	0	0	24	0%
Cabernet Sauvignon	3,658	19	15	6	3,698	0%
Malbec	18	1	0	0	19	0%
Merlot	344	0	0	0	344	0%
Meunier (Pinot Meunier)	2	0	0	0	2	0%
Petit Verdot	18	0	0	0	18	0%
Pinot Noir	32	0	0	0	32	0%
Shiraz	1,132	2	7	0	1,141	0%
Other Red	7	0	0	0	7	0%
Red winegrapes Total	5,236	23	22	6	5,287	0%
White winegrapes						
Chardonnay	250	0	0	0	250	0%
Riesling	45	0	0	0	45	0%
Sauvignon Blanc	84	0	0	0	84	0%
Semillon	10	0	0	0	10	0%
Other White	10	0	0	0	10	0%
White winegrapes Total	399	0	0	0	399	0%
Unknown variety	45	0	0	0	45	0%
All varieties Total	5,681	23	22	6	5,731	0%

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2024

Regional Summary Report

Currency Creek Wine Region

Wine Australia July 2024



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 14th May 2024
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Currency Creek Wine Region



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Currency Creek

Vintage overview

VINTAGE REPORT

Average winter rainfall followed by cool summer conditions resulted in a prolonged but well-balanced vintage for the Currency Creek Wine Region.

Variable weather during spring resulted in some yield variations within the district between both blocks and varieties. Bunch numbers were excellent overall, but berry set was variable. A mild and wet spring and early summer increased disease pressure throughout the growing season, incidence was high but severity low. Overall canopies were more vigorous allowing for healthy balanced ripeness across all varieties.

White varieties benefited from some early cooler climatic conditions and the maritime influence of the Southern Ocean.

Continued cooler than average mean temperatures through January and February eventually delayed harvest across most red varieties by 14-21 days when compared to the historical average start dates, many reds being picked after Easter.

The March and April temperatures continued to be below average, despite some heat spikes. Night-time temperatures were particularly low and were accompanied by frequent heavy dews.

Yields were below expected estimates overall, particularly in some red blocks where berry set was influenced by spring weather.

Early reds like Sangiovese were picked from the 28th of February; the second week of March saw the Cabernet Sauvignon and Shiraz harvested. Red varieties benefited greatly from the mild last few weeks of the summer. Currency Creek consistently produces high quality Shiraz and Cabernet Sauvignon; this year had its challenges but was no exception. These young red wines are already showing lifted and fruit-forward characteristics.

*Nathan Shaw, President
Currency Creek Wine Region*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Currency Creek winegrapes in 2024 was 3,515 tonnes, down by 9 per cent compared with the prior year's crush. Over the past five years, the average crush for the Currency Creek has been 4,007 tonnes, making this year's crush 12 per cent below the five-year (2019–2023) average.

It was the fourth-smallest reported crush since 2008, less than half the record crush of 10,169 tonnes in 2016.

There were 8 respondents to the survey who reported crushing grapes from the Currency Creek in 2024, compared with 11 in 2023.

The total value of winegrapes in 2024 was \$3.7 million, compared with \$4.2 million in 2023, a decrease of 12 per cent. The overall average value declined by 2 per cent from \$1,097 in 2023 to \$1,080 per tonne.

Due to the small number of purchasers, the average value of most varieties cannot be reported. The average value for white varieties decreased overall by 13 per cent, with Sauvignon Blanc down by 4 per cent to \$896 per tonne.

The price dispersion data shows a downward shift in prices paid, with 26 per cent of grapes purchased at \$600 per tonne or below, compared with 19 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in Currency Creek as at 30 April 2024 was 1,118 hectares, an increase of 126 hectares compared with the previous year and 123 more than it was in 2019.

There have been virtually no new plantings in the region for the last four years. Therefore, the increase in total area must be due to data corrections.

Currency Creek

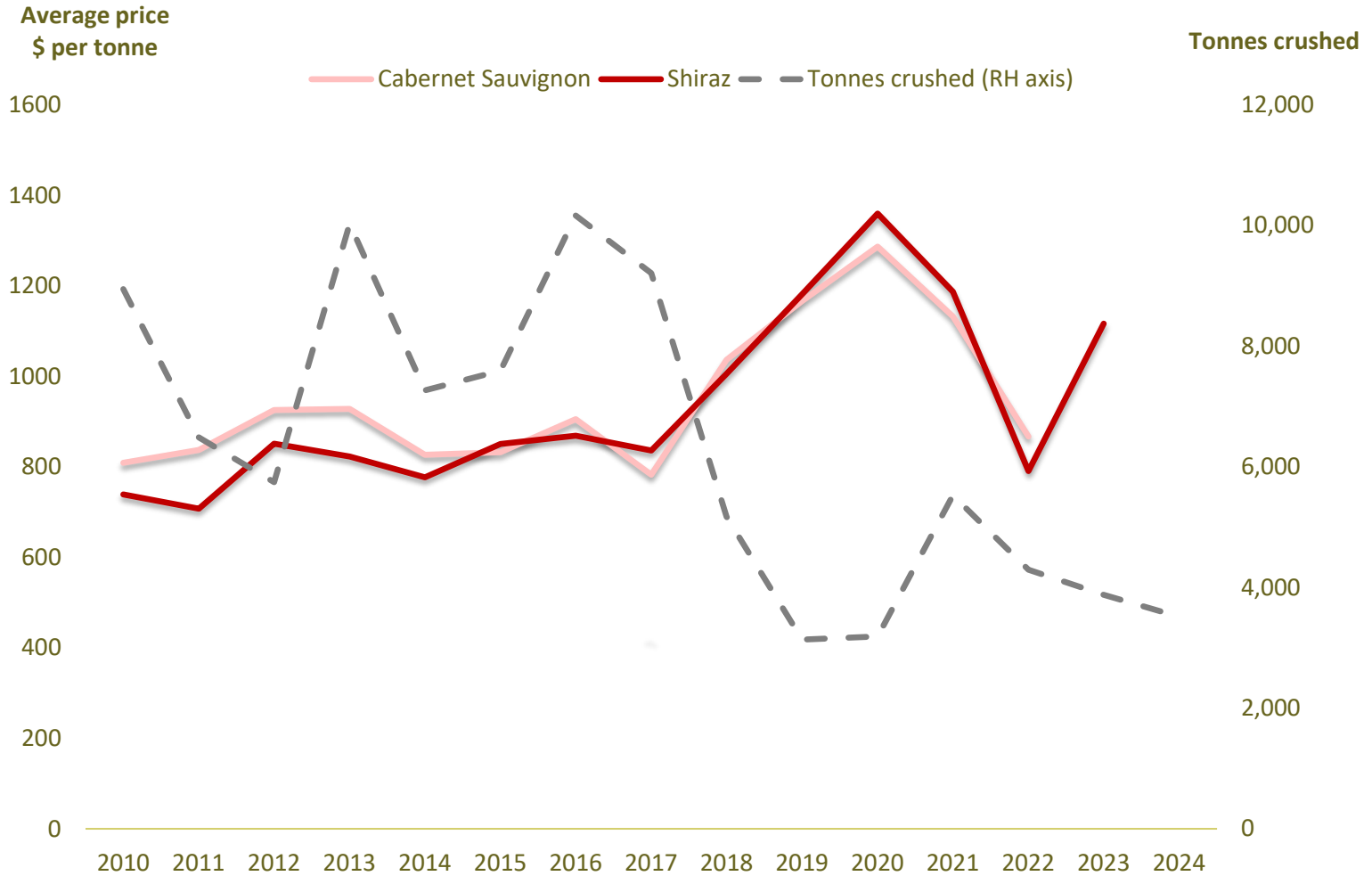
Winegrape intake summary table

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	1,011				60	6%	1,071	\$1,256,561
Grenache	79						79	\$71,334
Malbec	9						9	\$11,853
Merlot	267				25	9%	293	\$244,536
Nebbiolo	0						0	\$528
Petit Verdot	19						19	\$22,538
Pinot Noir	25						25	\$27,390
Sangiovese	31						31	\$46,157
Shiraz	786				263	25%	1,049	\$1,191,306
Tempranillo	14						14	\$20,250
Red Total	2,241				348	13%	2,589	\$2,892,452
White								
Chardonnay	122				403	77%	525	\$431,211
Gewürztraminer	34						34	\$25,575
Pinot Gris/Grigio	31						31	\$31,548
Roussanne	1						1	\$915
Sauvignon Blanc	260	\$233,284	\$896	-4%	47	15%	308	\$275,693
Vermentino	21						21	\$29,932
Viognier	5						5	\$6,870
White Total	475	\$428,634	\$906	-13%	450	49%	925	\$801,744
Grand Total	2,717	\$2,931,121	\$1,080	-2%	798	23%	3,515	\$3,694,196

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

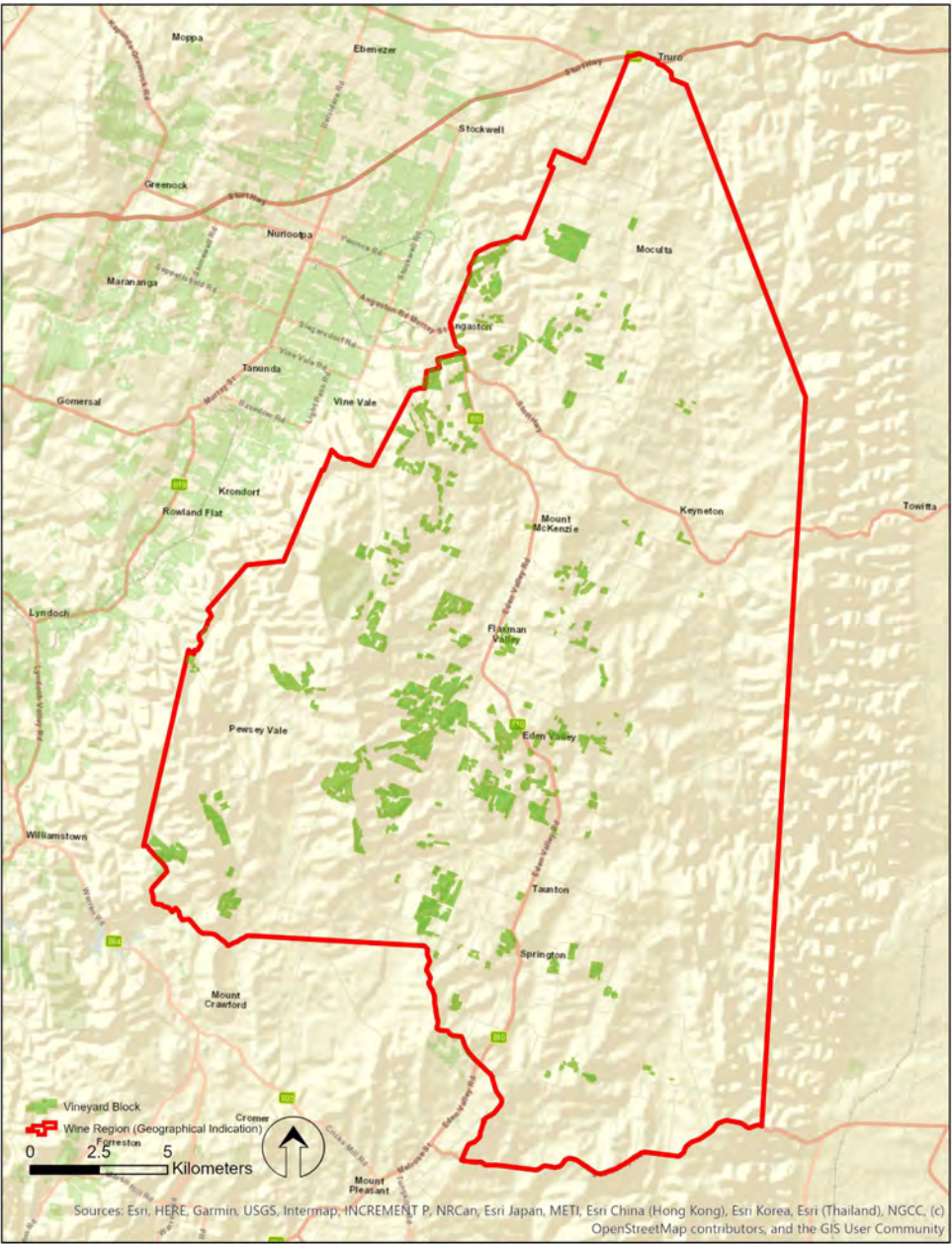
Varieties	Tonnes purchased in each segment			Total purchased
	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	
Red				
Cabernet Sauvignon	44	967		1,011
Grenache		79		79
Malbec		9		9
Merlot	267			267
Nebbiolo		0		0
Petit Verdot		19		19
Pinot Noir		25		25
Sangiovese		4	28	31
Shiraz	67	719		786
Tempranillo			14	14
Red Total	378	1,822	41	2,241
White				
Chardonnay	87	35		122
Gewürztraminer	34			34
Pinot Gris/Grigio		31		31
Roussanne	1			1
Sauvignon Blanc	201	60		260
Vermentino		21		21
Viognier			5	5
White Total	323	147	5	475
Total purchased	702	1,969	46	2,717

Currency Creek

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	288	0	0	0	288	0%
Merlot	57	0	0	0	57	0%
Pinot Noir	12	0	5	0	16	0%
Shiraz	347	0	4	0	351	0%
Other Red	40	0	0	0	40	0%
Red winegrapes Total	744	0	8	0	753	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	7	0	0	62	0%
Semillon	8	0	0	0	8	0%
Viognier	2	0	0	0	2	0%
Other White	11	7	0	0	18	0%
White winegrapes Total	239	14	0	0	252	0%
Unknown variety	113	0	0	0	113	0%
All varieties Total	1,095	14	8	0	1,118	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

Eden Valley Wine Region

Wine Australia July 2024

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

Eden Valley Wine Region



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Eden Valley

Vintage overview

VINTAGE REPORT

Winter saw below-average rains in Eden Valley (216 mm) and spring was even drier with only 119 mm (76 per cent of average). Rainfall was variable across the region, and some missed out on much of the rain.

Over the whole calendar year 2023, Eden Valley had average rainfall, although it didn't fall with the usual pattern.

The dry winter and spring made the vines work during the early part of the growing season, and bud burst started in September, three weeks earlier than the year before. Damaging frosts particularly, in September and October meant some vineyards had significant damage that influenced their subsequent yield.

Daytime temperatures in October and November were close to average, although windy weather and a heat spike in the middle of November did cause issues with flowering and hence fruit set in some vineyards.

With some rain, and slightly cooler than average days, December and early January saw vines flourish and move quickly into their ripening phase.

February, March and April remained dry, with many vineyards having more than 50 days with no recorded rainfall. An unseasonal heatwave in early March caused short-lived concern, but those vines that still had grapes recovered well in the following cooler weather.

Most varieties and vineyards were picked before Easter (end of March) with only the later ripening varieties and sites picking into April.

In 2024, quality across the board looks exceptional, although yields were variable. The whites are electric – with great natural acids and fine aromas, Riesling of course stands out, as do most of the other varieties.

*Louisa Rose, Yalumba Wines
On behalf of Barossa Australia*

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Eden Valley winegrapes in 2024 was 6,736 tonnes, down by 6 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Eden Valley has been 6,548 tonnes, making this year's crush very similar to the five-year average.

There were 46 respondents to the survey who reported crushing grapes from the Eden Valley in 2024, compared with 44 in 2023.

The total value of winegrapes in 2024 decreased by 6 per cent from \$15 million to \$14 million, as a result of the reduced crush combined with a small overall decrease in the average purchase value of grapes, which was down by 3 per cent from \$2163 to \$2097 per tonne.

The average value for the two largest varieties increased: Shiraz up by 3 per cent to \$2715 per tonne and Riesling up 1 per cent to \$2281 per tonne.

The price dispersion data shows a downward shift, with 45 per cent of all grapes being purchased at \$2000 per tonne or above compared with 52 per cent in 2023.

According to Vinehealth Australia data, there were 13 hectares of new vines planted in the region in the 2023–24 season compared with 6 hectares in the previous season. More than half of the new plantings (7 hectares) were Riesling. The average vineyard size in Eden Valley is 13.7 hectares, compared with the state average of 16.1 hectares.

The total vineyard area in the Eden Valley as at 30 April 2024 was 2,292 hectares, approximately 41 hectares less than it was in 2019.

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								
Barbera					1	100%	1	\$2,227
Cabernet Franc	14				16	53%	30	\$77,240
Cabernet Sauvignon	111	\$259,214	\$2,339	6%	365	77%	476	\$1,113,951
Durif					16	100%	16	\$15,562
Graciano					3	100%	3	\$6,182
Grenache	24	\$74,411	\$3,043	-2%	48	66%	72	\$220,543
Lagrein					5	100%	5	\$9,916
Malbec					0	100%	0	\$600
Mataro/Mourvedre	3				64	95%	67	\$165,688
Merlot	72	\$62,966	\$872	-20%	68	49%	141	\$122,514
Montepulciano	6				8	58%	14	\$28,920
Nebbiolo					1	100%	1	\$3,264
Petit Verdot					6	100%	6	\$8,048
Pinot Noir	147	\$232,223	\$1,576	-7%	9	6%	156	\$245,876
Shiraz	1,018	\$2,763,859	\$2,715	3%	939	48%	1,957	\$5,314,785
Tempranillo	21				13	39%	34	\$67,180
Other red					6	100%	6	\$10,646
Red Total	1,417	\$3,490,373	\$2,464	-2%	1,570	53%	2,987	\$7,413,140
White								
Chardonnay	461	\$803,927	\$1,744	-0%	380	45%	841	\$1,467,070
Gewürztraminer	7				4	40%	11	\$13,190
Grüner Veltliner					5	100%	5	\$10,331
Muscat à Petits Grains								
Blancs	22	\$19,216	\$878	0%	4	16%	26	\$22,777
Pinot Gris/Grigio	81	\$126,752	\$1,558	8%	93	53%	175	\$272,137
Riesling	1,029	\$2,077,445	\$2,020	1%	1,252	55%	2,281	\$4,605,836
Roussanne	30				4	11%	34	\$49,988
Sauvignon Blanc	22				39	64%	62	\$74,118
Semillon	95	\$71,430	\$754	-1%	26	22%	121	\$91,150
Viognier	87	\$152,920	\$1,767	-6%	64	42%	150	\$265,339
Other white	17				27	61%	44	\$77,550
White Total	1,850	\$3,360,330	\$1,816	1%	1,899	51%	3,749	\$6,949,486
Grand Total	3,267	\$6,850,703	\$2,097	-3%	3,469	51%	6,736	\$14,362,626

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

Varieties	Tonnes purchased in each segment				Total purchased
	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red					
Cabernet Franc				14	14
Cabernet Sauvignon			46	65	111
Grenache			1	23	24
Mataro/Mourvedre				3	3
Merlot	61	11			72
Montepulciano				6	6
Pinot Noir		61	67	20	147
Shiraz	25	81	279	633	1,018
Tempranillo				21	21
Red Total	87	153	392	785	1,417
White					
Chardonnay	4		393	64	461
Gewürztraminer		5	2		7
Muscat à Petits Grains Blancs	17	5			22
Pinot Gris/Grigio		23	58		81
Riesling		22	404	602	1,029
Roussanne		13	18		30
Sauvignon Blanc		22			22
Semillon	87	6	2		95
Viognier		30	29	28	87
Other white			17		17
White Total	108	126	924	693	1,850
Total purchased	194	279	1,316	1,479	3,267

Eden Valley

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Franc	6	0	0	0	6	0%
Cabernet Sauvignon	334	0	0	0	334	0%
Grenache	26	5	2	1	34	3%
Mataro (Mourvedre)	16	0	0	0	16	0%
Merlot	49	0	0	0	49	0%
Montepulciano	5	0	0	0	5	0%
Petit Verdot	7	0	0	0	7	0%
Pinot Noir	54	0	0	0	54	0%
Shiraz	800	2	0	1	804	0%
Tempranillo	12	2	0	0	14	0%
Other Red	12	0	0	0	13	0%
Red winegrapes Total	1,321	10	3	2	1,336	0%
White winegrapes						
Chardonnay	239	0	0	0	239	0%
Muscat A Petit Grains Blanc (White Frontignac)	6	0	0	0	6	0%
Pinot Gris	38	2	0	3	43	7%
Riesling	517	4	4	7	532	1%
Sauvignon Blanc	35	0	0	0	35	0%
Semillon	15	0	0	0	15	0%
Traminer (Gewurztraminer)	14	0	0	0	14	0%
Viognier	32	0	0	0	32	0%
Other White	21	1	0	1	23	4%
White winegrapes Total	918	8	4	11	940	1%
Unknown variety	17	0	0	0	17	0%
All varieties Total	2,256	17	6	13	2,292	1%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

Fleurieu zone - other

Wine Australia July 2024

DATUM: GDA2020
 PROJECTION: SA Lambert
 DATE: 21st December 2021
 SOFTWARE: ESRI ArcGIS v10.8.1
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

**Fleurieu
 Wine Zone**



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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								
Cabernet Sauvignon	10						10	\$9,620
Grenache	10						10	\$9,950
Malbec	4						4	\$4,320
Shiraz	17						17	\$18,345
Tempranillo	10						10	\$18,594
Red Total	51						51	\$60,829
White								
Chardonnay	327	\$208,747	\$638	-0%			327	\$208,747
Pinot Gris/Grigio	182						182	\$183,114
Prosecco	10						10	\$13,585
Sauvignon Blanc	114						114	\$127,683
Vermentino	12						12	\$15,418
White Total	645	\$548,547	\$851	1%			645	\$548,547
Grand Total	696	\$609,376	\$876	4%			696	\$609,376

There were 8 respondents to the survey who reported crushing grapes from Fleurieu Zone – other in 2024, the same number as in 2023.

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	\$1500-<\$2000	Total purchased
Red					
Cabernet Sauvignon			10		10
Grenache			10		10
Malbec			4		4
Shiraz	8		2	7	17
Tempranillo				10	10
Red Total	8		26	17	51
White					
Chardonnay		327			327
Pinot Gris/Grigio			182		182
Prosecco			10		10
Sauvignon Blanc			107	7	114
Vermentino			12		12
White Total		327	311	7	645
Total purchased	8	327	337	24	696

Fleurieu zone - other

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	17	0	0	0	17	0%
Grenache	1	0	0	0	1	0%
Shiraz	68	0	0	0	68	0%
Other Red	3	0	0	0	3	0%
Red winegrapes Total	89	0	0	0	89	0%
White winegrapes						
Chardonnay	29	0	0	0	29	0%
Other White	36	0	0	0	36	0%
White winegrapes Total	65	0	0	0	65	0%
All varieties Total	154	0	0	0	154	0%

Source:
Vinehealth
Australia

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					22	100%	22	\$31,033
Malbec					1	100%	1	\$689
Merlot					4	100%	4	\$3,661
Montepulciano					1	100%	1	\$1,022
Pinot Noir					4	100%	4	\$10,064
Shiraz					51	100%	51	\$77,374
Red Total					82	100%	82	\$123,845
White								
Chardonnay					9	100%	9	\$12,716
Pinot Gris/Grigio					14	100%	14	\$20,265
Riesling					7	100%	7	\$10,544
Roussanne					1	100%	1	\$1,198
Sauvignon Blanc					13	100%	13	\$19,027
Other white					2	100%	2	\$3,052
White Total					45	100%	45	\$66,802
Grand Total					127	100%	127	\$190,647

There were 4 respondents to the survey who reported crushing grapes from Kangaroo Island in 2024, the same number as in 2023.

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

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	43	0	0	0	43	0%
Malbec	1	0	0	0	1	0%
Merlot	4	0	0	0	4	0%
Shiraz	44	0	0	0	44	0%
Other Red	10	0	0	0	10	0%
Red winegrapes Total	102	0	0	0	102	0%
White winegrapes						
Chardonnay	9	0	0	0	9	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other White	7	0	0	1	8	13%
White winegrapes Total	25	0	0	1	26	4%
Unknown variety	16	0	0	0	16	0%
All varieties Total	143	0	0	1	144	1%

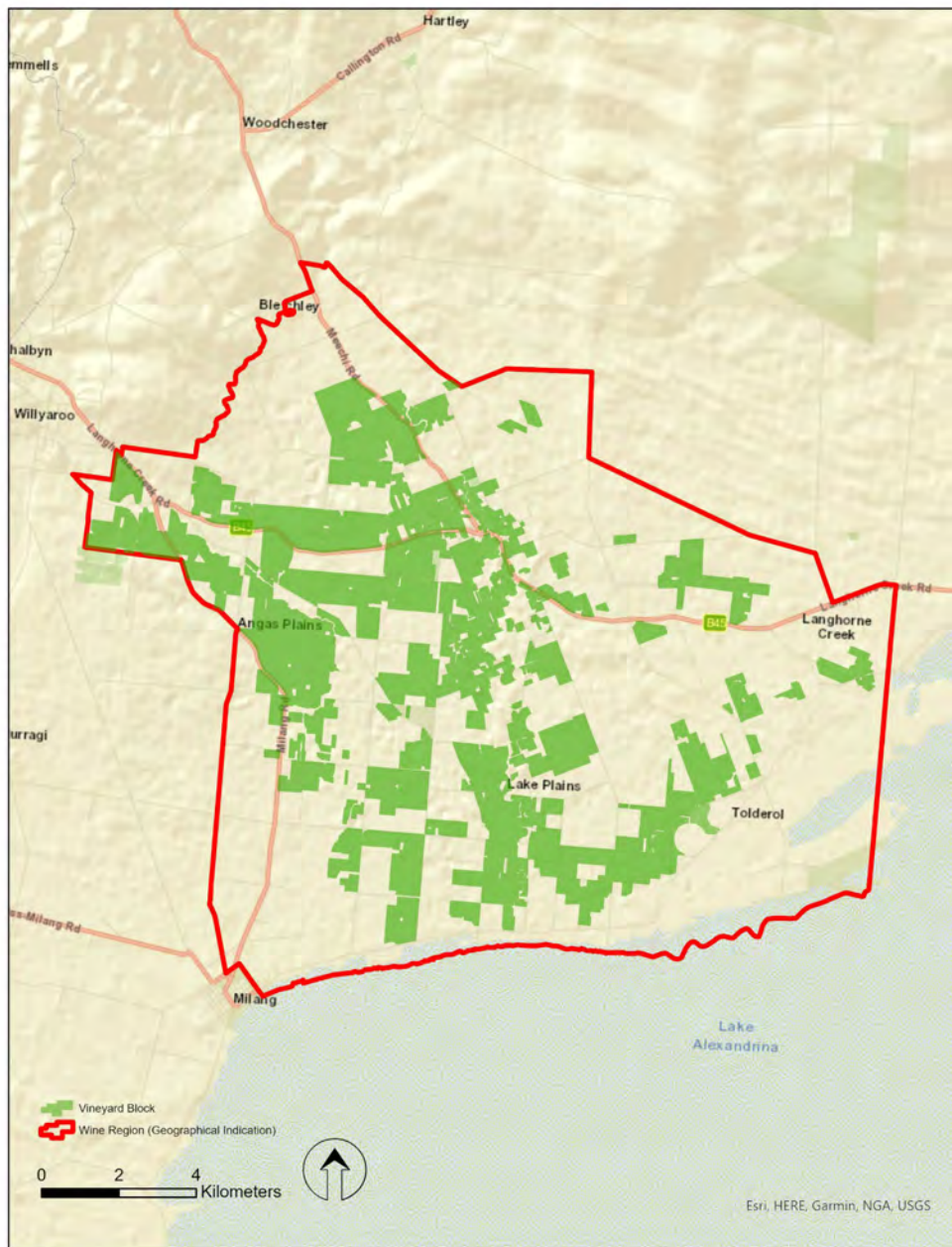
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2024

Regional Summary Report

Langhorne Creek Wine Region

Wine Australia July 2024



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 14 May 2024
SOFTWARE: ESRI ArcGIS v10.8.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Langhorne Creek Wine Region



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Langhorne Creek

Vintage overview

VINTAGE REPORT

The vintage 2024 season presented a few challenges during the growing season, but Langhorne Creek continues to produce wine of excellent quality.

Early and late winter rainfall was above-average, and a few riverside vineyards also received a small flood, giving the soil a good soak. September and October were very dry and a few growers suffered minor frost damage and crop losses. An early but windy and cool extended flowering period in October challenged berry set and uniformity. This was followed soon after by a particularly wet November, December and January. This was good for vines that had achieved berry set but sent many vines into a vegetative cycle with some bunch shatter and further crop losses.

The mild summer was great for vine development and maintaining acidity, with a few warm periods in February pushing vines towards a focus on ripening fruit. Generally, yields were reduced due to the poor flowering period, despite the rainfall that followed flowering. The larger canopy growth from additional rainfall reduced levels of sunburn whilst maintaining acidity and aromatic compounds. That is, up until the Adelaide Cup weekend in mid-March, when the region experienced 4 hot days combined with above-average night temperatures in the low 20's.

Harvest began on the last day of January with the intake of fruit for sparkling base. The white wine intake began in early February and the red grape harvest kicked in early and pushed along rapidly until the 8th of March when the region held its breath to ride out the heat. This period put vines, people, and ferments under pressure but consistent monitoring, adaptation, overnight pressing and hard work, maintained quality.

The bulk of the Langhorne Creek vintage concluded by the second week of April with Shiraz, Cabernet Sauvignon and other late varieties completing the winery intakes.

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

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Langhorne Creek winegrapes in 2024 was 23,102 tonnes, down by 13 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for Langhorne Creek has been 36,799 tonnes, making this year's crush 37 per cent below the five-year average. It was the lowest reported crush since 2008.

There were 47 respondents to the survey who reported crushing grapes from the Langhorne Creek in 2024, compared with 49 in 2023.

The total value of winegrapes in 2024 was \$21 million, compared with \$23 million in 2023, a decrease of 7 per cent. The decreased crush was partly offset by an increase in the average purchase value of grapes, which was up by 4 per cent from \$852 to \$884 per tonne.

There were increases in average prices for the three largest red varieties: Shiraz up by 3 per cent to \$923 per tonne, Cabernet Sauvignon up by 2 per cent to \$816 per tonne and Merlot up by 26 per cent to \$704 per tonne. The top white variety (in tonnage terms), Chardonnay, declined by 1 per cent in average value to \$658 per tonne. Pinot Gris/Grigio increased by 1 per cent to \$1076 per tonne.

The price dispersion data shows little change, although the percentage of grapes purchased at below \$600 per tonne decreased from 21 per cent to 19 per cent.

According to Vinehealth Australia data, the total vineyard area in Langhorne Creek as at 30 April 2024 was 5,777 hectares, a decrease of 107 hectares compared with the previous year and 182 less than it was 5 years ago. The average vineyard size in Langhorne Creek is 44.1 hectares, compared with the state average of 16.1 hectares.

There were no reported new plantings in the region this year, compared with 20 hectares in the previous season, split evenly between red and white.

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								
Cabernet Franc	5				16	75%	22	\$23,650
Cabernet Sauvignon	3,952	\$3,224,883	\$816	2%	779	16%	4,731	\$3,860,896
Durif	168						168	\$33,688
Graciano					4	100%	4	\$6,675
Grenache	762	\$832,136	\$1,092	9%	448	37%	1,210	\$1,321,575
Lagrein	3						3	\$3,192
Malbec	424	\$500,556	\$1,180	1%	68	14%	492	\$580,453
Mataro/Mourvedre	3				3	46%	6	\$6,180
Merlot	888	\$625,348	\$704	26%	437	33%	1,325	\$933,215
Montepulciano	17	\$36,570	\$2,136	-6%	12	42%	30	\$63,229
Nebbiolo					2	100%	2	\$4,119
Nero d'Avola					1	100%	1	\$1,846
Petit Verdot	2				20	89%	23	\$25,174
Pinot Meunier	60						60	\$59,500
Pinot Noir	755	\$1,076,180	\$1,425	-2%	329	30%	1,084	\$1,544,607
Ruby Cabernet					3	100%	3	\$3,280
Sangiovese	117	\$161,581	\$1,379	3%	10	8%	127	\$175,509
Shiraz	6,764	\$6,248,216	\$923	3%	1,557	19%	8,321	\$7,685,392
Tempranillo	12				10	47%	22	\$31,472
Touriga Nacional	8						8	\$14,652
Other red	13				7	37%	20	\$32,980
Red Total	13,954	\$12,863,653	\$921	7%	3,707	21%	17,661	\$16,411,283

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

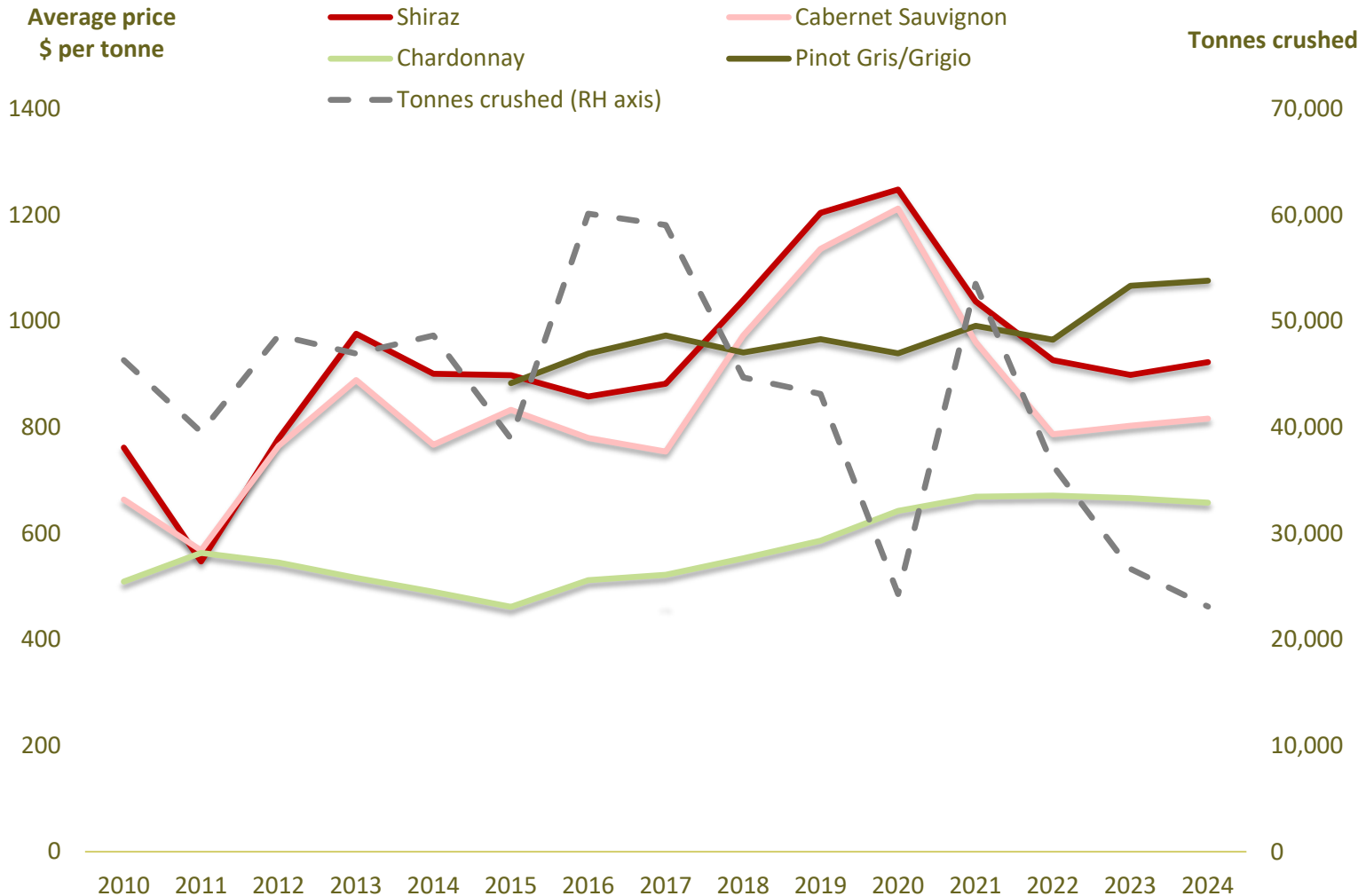
Winegrape intake summary table – white winegrapes

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	3,054	\$2,008,982	\$658	-1%	268	8%	3,322	\$2,184,981
Fiano	26	\$49,217	\$1,912	7%	5	17%	31	\$59,046
Marsanne					1	100%	1	\$996
Muscat à Petits Grains Blancs					20	100%	20	\$23,315
Pinot Gris/Grigio	395	\$425,365	\$1,076	1%	35	8%	430	\$463,230
Riesling					911	100%	911	\$1,411,800
Sauvignon Blanc	389	\$409,697	\$1,054	-1%	240	38%	629	\$662,911
Verdelho					54	100%	54	\$62,839
Vermentino	29				7	19%	36	\$40,439
Other white					9	100%	9	\$16,639
White Total	3,893	\$2,926,125	\$752	-6%	1,548	28%	5,441	\$4,926,198
Grand Total	17,847	\$15,789,778	\$884	4%	5,255	23%	23,102	\$21,337,481

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

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Cabernet Franc			5			5
Cabernet Sauvignon	1,091	1,101	1,683	64	12	3,952
Durif	168					168
Grenache			762			762
Lagrein			3			3
Malbec			405	19		424
Mataro/Mourvedre			3			3
Merlot	109	774	5			888
Montepulciano				6	11	17
Petit Verdot			2			2
Pinot Meunier			60			60
Pinot Noir			377	379		755
Sangiovese			105	10		115
Shiraz	882	2,480	3,159	147	96	6,764
Tempranillo			3	9		12
Touriga Nacional				8		8
Other red			10		2	13
Red Total	2,250	4,355	6,583	642	122	13,952
White						
Chardonnay	1,181	1,599	275			3,054
Fiano				8	18	26
Pinot Gris/Grigio			379	16		395
Sauvignon Blanc			389			389
Vermentino			29			29
White Total	1,181	1,599	1,072	24	18	3,893
Total purchased	3,431	5,953	7,655	665	140	17,845

Langhorne Creek

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Franc	9	0	0	0	9	0%
Cabernet Sauvignon	1,891	5	2	0	1,898	0%
Dolcetto	8	0	0	0	8	0%
Durif (Petite Sirah)	7	0	0	0	7	0%
Grenache	78	0	2	0	80	0%
Lagrein	10	0	0	0	10	0%
Malbec	94	4	0	0	98	0%
Mataro (Mourvedre)	8	0	0	0	8	0%
Merlot	376	0	0	0	376	0%
Nero d'Avola	0	0	1	0	1	0%
Petit Verdot	9	0	0	0	9	0%
Pinot Noir	100	2	2	0	105	0%
Sangiovese	15	0	0	0	15	0%
Shiraz	2,295	5	0	0	2,300	0%
Tempranillo	5	0	2	0	7	0%
Zinfandel	7	0	0	0	7	0%
Other Red	27	0	0	0	27	0%
Red winegrapes Total	4,938	16	10	0	4,964	0%
White winegrapes						
Chardonnay	433	0	0	0	433	0%
Fiano	7	0	2	0	10	0%
Pinot Gris	50	0	0	0	50	0%
Riesling	138	0	0	0	138	0%
Sauvignon Blanc	75	0	5	0	80	0%
Verdelho	8	0	0	0	8	0%
Other White	30	0	3	0	33	0%
White winegrapes Total	741	0	10	0	751	0%
Unknown variety	56	0	0	0	56	0%
Rootstock	6	0	0	0	6	0%
All varieties Total	5,741	16	20	0	5,777	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

Limestone Coast zone - other

Limestone Coast zone - other includes any vineyards in the Limestone Coast zone that are outside the GI regions of Coonawarra, Padthaway, Wrattenbully, Mount Benson, Robe and Mount Gambier.

Wine Australia July 2024

DATUM: GDA2020
 PROJECTION: SA Lambert
 DATE: 06th July 2021
 SOFTWARE: ESRI ArcGIS v10.8.1
 DATA SOURCE:
 Vineyard Block - Vinehealth Australia
 Wine Region - Wine Australia

**Limestone Coast
 Wine Zone**



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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	73						73	\$89,914
Cabernet Sauvignon	262	\$287,212	\$1,098	6%	114	30%	376	\$412,335
Malbec	79						79	\$93,552
Mataro/Mourvedre	199						199	\$159,320
Merlot	605				46	7%	650	\$554,210
Montepulciano	4						4	\$6,112
Nebbiolo					2	100%	2	\$4,144
Pinot Noir	31				31	51%	62	\$52,483
Shiraz	1,127				3	0%	1,129	\$1,392,999
Other red	57	\$60,554	\$1,063	0%			57	\$60,554
Red Total	2,436	\$2,627,745	\$1,079	1%	195	7%	2,631	\$2,825,624
White								
Chardonnay	264	\$221,645	\$840	-1%	30	10%	294	\$246,838
Pinot Gris/Grigio	78						78	\$100,660
Prosecco	14						14	\$18,603
Sauvignon Blanc	41						41	\$50,945
Semillon	32						32	\$24,204
Vermentino	20						20	\$14,333
White Total	449	\$430,390	\$959	8%	30	6%	479	\$455,583
Grand Total	2,884	\$3,058,135	\$1,060	2%	225	7%	3,109	\$3,281,206

There were 11 respondents to the survey who reported crushing grapes from Limestone Coast zone – other in 2024, compared with 13 in 2023.

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

Varieties	Tonnes purchased in each segment				Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	
Red					
Cabernet Franc			73		73
Cabernet Sauvignon	29	47	176	10	262
Malbec			79		79
Mataro/Mourvedre		199			199
Merlot		605			605
Montepulciano				4	4
Pinot Noir		31			31
Shiraz		189	938		1,127
Other red		14	43		57
Red Total	29	1,085	1,308	14	2,436
White					
Chardonnay		264			264
Pinot Gris/Grigio			59	19	78
Prosecco			14		14
Sauvignon Blanc			41		41
Semillon		32			32
Vermentino		20			20
White Total		317	113	19	449
Total purchased	29	1,401	1,421	33	2,884

Limestone Coast zone - other

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Franc	31	0	0	0	31	0%
Cabernet Sauvignon	580	0	0	0	580	0%
Malbec	22	2	0	0	24	0%
Merlot	162	0	0	0	162	0%
Petit Verdot	25	0	0	0	25	0%
Pinot Noir	11	5	0	16	32	50%
Shiraz	400	0	5	0	405	0%
Other Red	57	0	3	0	60	0%
Red winegrapes Total	1,289	7	8	16	1,320	1%
White winegrapes						
Chardonnay	116	0	0	0	116	0%
Pinot Gris	24	0	3	0	28	0%
Sauvignon Blanc	20	0	0	15	35	43%
Other White	15	0	7	0	22	0%
White winegrapes Total	174	0	10	15	200	8%
All varieties Total	1,463	7	18	31	1,520	2%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2024

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



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McLaren Vale

Vintage overview

VINTAGE REPORT

The McLaren Vale wine region experienced average winter rainfall and a mild winter. Early spring was drier than normal, characterised by higher-than-average daily temperatures and colder than average nights. These conditions led to frost damage in some low-lying vineyards, particularly in areas around Kangarilla and along Pedler Creek, and delayed budburst. On the positive side, the dry conditions resulted in low disease pressure.

From Mid-November rain fell and cool to mild temperatures combined to produce challenging climatic conditions when combined with a high wind event and an unusual day in November where some vineyard temperatures reached 40°C. Growers rallied to the challenges.

Capfall commenced in October and continued into November, with extended flowering as a result of cooler than normal temperatures. There were a couple of high rainfall events occurring at the end of November.

Summer was the wettest since 2002, with rainfall occurring through December and into January. Similar to 2023, rain eased in January and has not been felt again throughout autumn.

From late January 2024 temperatures climbed, and the combination of high temperatures and small bunches (due to poor set), resulted in a short period of veraison. Once again high winds plagued some pockets of the region and further reduced yield.

Hot dry conditions resulted in a compacted vintage; whites were picked in the first two weeks and the majority of reds harvested before an early Easter. The late ripening reds, including Grenache, were picked post-Easter. Grenache crops fared well this season, with good set and veraison occurring after the main heat extremes, and higher yields than most.

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

OVERVIEW OF VINTAGE STATISTICS

The reported crush of McLaren Vale winegrapes in 2024 was 28,242 tonnes, up by 7 per cent compared with the prior year's crush. Over the past five years, the average reported crush for the McLaren Vale has been 32,108 tonnes, making this year's crush 12 per cent below the five-year (2019–2023) average.

There were a record 98 respondents to the survey who reported crushing grapes from McLaren Vale in 2024, compared with 86 in 2023.

The total value of winegrapes in McLaren Vale in 2024 was \$45.9 million, an increase of 1 per cent compared with 2023. The overall average value declined by 6 per cent from \$1,693 in 2023 to \$1,593 per tonne.

Of the major varieties, Grenache had the highest average value at \$2166 per tonne (down 11 per cent). Shiraz declined by 8 per cent to \$1589 per tonne, while Cabernet Sauvignon was down 3 per cent to \$1508 per tonne. These latter two varieties have both seen decreases of more than \$400 per tonne since 2020, while Grenache continued to increase until 2024.

The price dispersion data shows a downward shift, with 24 per cent of all grapes being purchased at \$2000 per tonne or above compared with 30 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in the McLaren Vale as at 30 April 2024 was 7,383 hectares, a net increase of 8 hectares compared with the previous year and 46 more than it was in 2019. The average vineyard size in McLaren Vale is 11.2 hectares, compared with the state average of 16.1 hectares.

There were 34 hectares of new plantings (including top-working and replacements) in the 2023–24 season, including 11 hectares of Grenache, 4 hectares of Sangiovese and 7 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	5						5	\$10,883
Cabernet Franc	20	\$46,557	\$2,327	24%	2	7%	22	\$50,235
Cabernet Sauvignon	2,847	\$4,293,829	\$1,508	-3%	1,829	39%	4,675	\$7,051,580
Durif	6				1	19%	8	\$11,535
Graciano	33	\$71,137	\$2,182	0%	10	23%	43	\$92,829
Grenache	1,065	\$2,307,767	\$2,166	-11%	1,575	60%	2,640	\$5,719,746
Malbec	1				14	93%	15	\$30,156
Mataro/Mourvedre	335	\$717,193	\$2,142	12%	233	41%	568	\$1,215,516
Merlot	309	\$319,790	\$1,035	-4%	156	34%	465	\$481,110
Montepulciano	20	\$38,030	\$1,877	-8%	33	62%	54	\$100,608
Muscat à Petits Grains Rouges	1				9	90%	10	\$16,736
Nebbiolo					3	100%	3	\$7,877
Nero d'Avola	16	\$30,671	\$1,942	-10%	35	69%	51	\$98,335
Petit Verdot	9				65	87%	74	\$107,781
Pinot Noir	261	\$363,740	\$1,392	-2%	26	9%	288	\$400,513
Sangiovese	250	\$485,374	\$1,945	1%	140	36%	389	\$756,763
Shiraz	10,544	\$16,756,418	\$1,589	-8%	5,164	33%	15,708	\$24,962,710
Tempranillo	180	\$340,320	\$1,886	-5%	124	41%	304	\$573,939
Touriga Nacional	42	\$85,764	\$2,048	-4%	46	52%	88	\$179,619
Other red	57	\$107,510	\$1,881	2%	145	72%	202	\$382,649
Red Total	16,002	\$26,001,510	\$1,625	-6%	9,609	38%	25,611	\$42,251,120

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

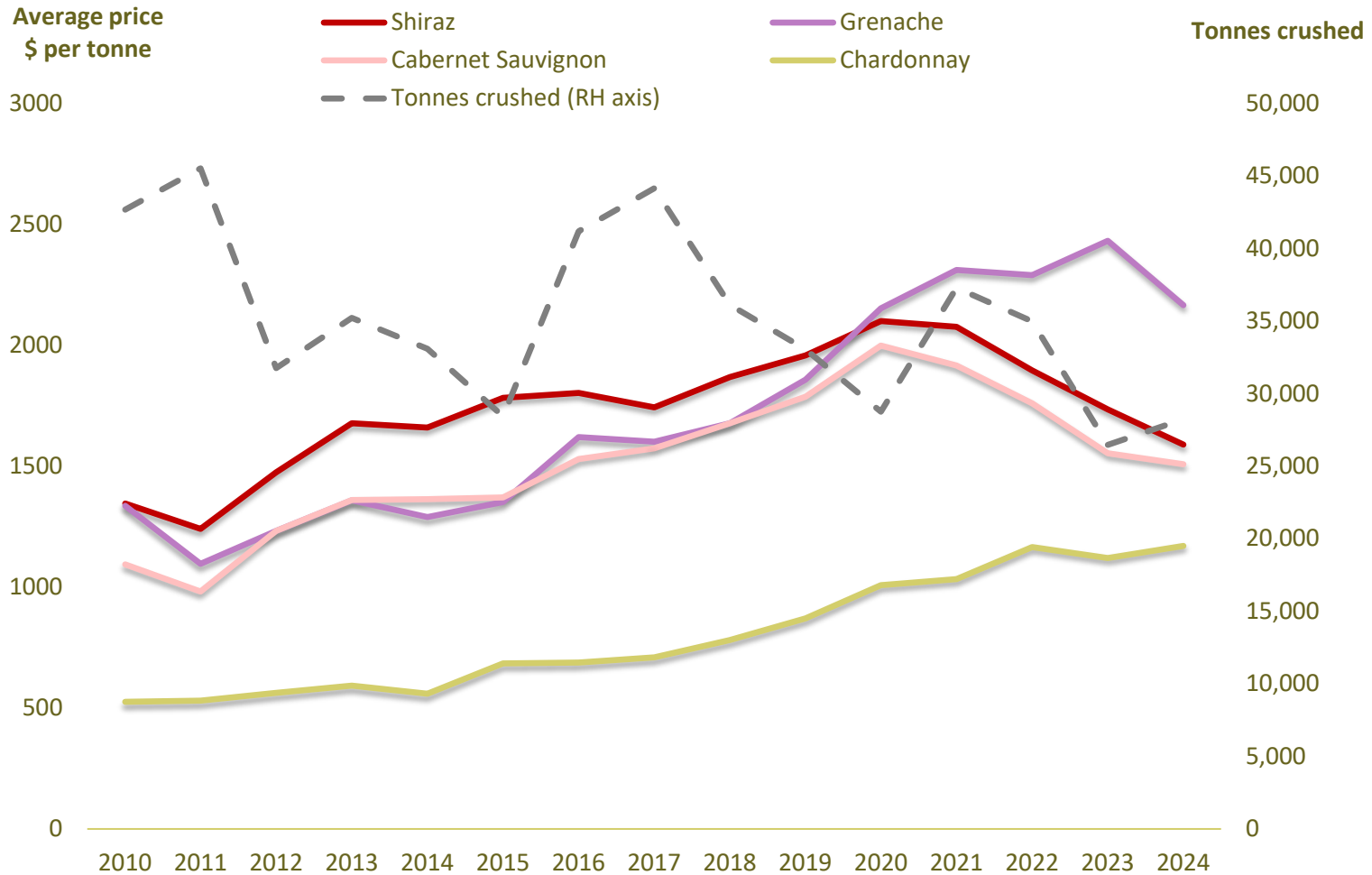
Winegrape intake summary table – white winegrapes

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	1,211	\$1,417,898	\$1,170	4%	183	13%	1,394	\$1,631,808
Chenin blanc	58	\$91,846	\$1,569	-30%			58	\$91,846
Fiano	129	\$215,712	\$1,668	-8%	112	46%	241	\$402,801
Gewürztraminer	6						6	\$5,990
Marsanne	36				16	31%	52	\$87,669
Muscat à Petits Grains Blancs	3				17	83%	20	\$38,874
Pinot Gris/Grigio					107	100%	107	\$151,608
Prosecco	9						9	\$15,470
Riesling	51				25	33%	76	\$111,585
Roussanne					21	100%	21	\$28,441
Sauvignon Blanc	17	\$36,101	\$2,154	47%	145	90%	162	\$348,044
Semillon					48	100%	48	\$57,824
Verdelho	66						66	\$74,690
Vermentino	42	\$82,246	\$1,969	2%	48	54%	90	\$177,490
Viognier	32				162	83%	194	\$328,634
Other white	20	\$36,437	\$1,858	-14%	67	77%	86	\$144,200
White Total	1,680	\$2,172,129	\$1,293	2%	951	36%	2,631	\$3,696,976
Grand Total	17,682	\$28,173,638	\$1,593	-6%	10,560	37%	28,242	\$45,948,096

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)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera					5	5
Cabernet Franc				8	12	20
Cabernet Sauvignon	16	43	1,442	1,007	338	2,847
Durif				6		6
Graciano				5	27	33
Grenache			167	246	653	1,065
Malbec					1	1
Mataro/Mourvedre			25	150	160	335
Merlot		97	185	25	2	309
Montepulciano				12	8	20
Muscat à Petits Grains Rouges				1		1
Nero d'Avola			2		13	16
Petit Verdot			9			9
Pinot Noir			208	35	18	261
Sangiovese				163	86	250
Shiraz	791	379	4,027	2,743	2,603	10,543
Tempranillo			34	49	97	180
Touriga Nacional				15	27	42
Other red				25	32	57
Red Total	807	520	6,100	4,490	4,084	16,001

McLaren Vale

Price dispersion – purchased grapes (white)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
White						
Chardonnay			1,087	89	35	1,211
Chenin blanc			4	42	12	58
Fiano			36	50	44	129
Gewürztraminer			6			6
Marsanne				36		36
Muscat à Petits Grains Blancs				3		3
Prosecco				9		9
Riesling			25	25		51
Sauvignon Blanc			1		16	17
Verdelho			66			66
Vermentino				14	28	42
Viognier			0	32		32
Other white		6		2	12	20
White Total		6	1,226	302	146	1,680
Total purchased	807	526	7,326	4,792	4,230	17,681

McLaren Vale

Current plantings by variety and year planted - reds

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Aglianico	5	1	0	1	7	14%
Barbera	12	0	0	0	12	0%
Cabernet Franc	21	0	0	0	21	0%
Cabernet Sauvignon	1,294	1	0	0	1,295	0%
Carignan	5	0	0	0	6	0%
Cinsault	3	0	1	0	4	0%
Durif (Petite Sirah)	5	0	0	0	5	0%
Graciano	6	0	0	0	6	0%
Grenache	468	19	14	11	512	2%
Malbec	13	0	0	0	13	0%
Mataro (Mourvedre)	95	2	1	0	97	0%
Mencia	6	0	1	0	7	0%
Merlot	176	0	0	0	176	0%
Montepulciano	19	0	0	1	20	5%
Nebbiolo	2	0	0	0	2	0%
Nero d'Avola	24	2	3	2	31	7%
Petit Verdot	41	0	0	0	41	0%
Pinot Noir	45	0	0	0	45	0%
Sagrantino	6	0	0	0	7	0%
Sangiovese	43	0	7	4	54	7%
Saperavi	3	0	0	2	5	40%
Shiraz	4,134	13	4	0	4,152	0%
Tempranillo	69	4	1	1	73	1%
Touriga	21	0	0	0	21	0%
Zinfandel	3	0	0	0	3	0%
Other Red	25	1	0	0	26	0%
Red winegrapes Total	6,546	43	31	22	6,641	0%

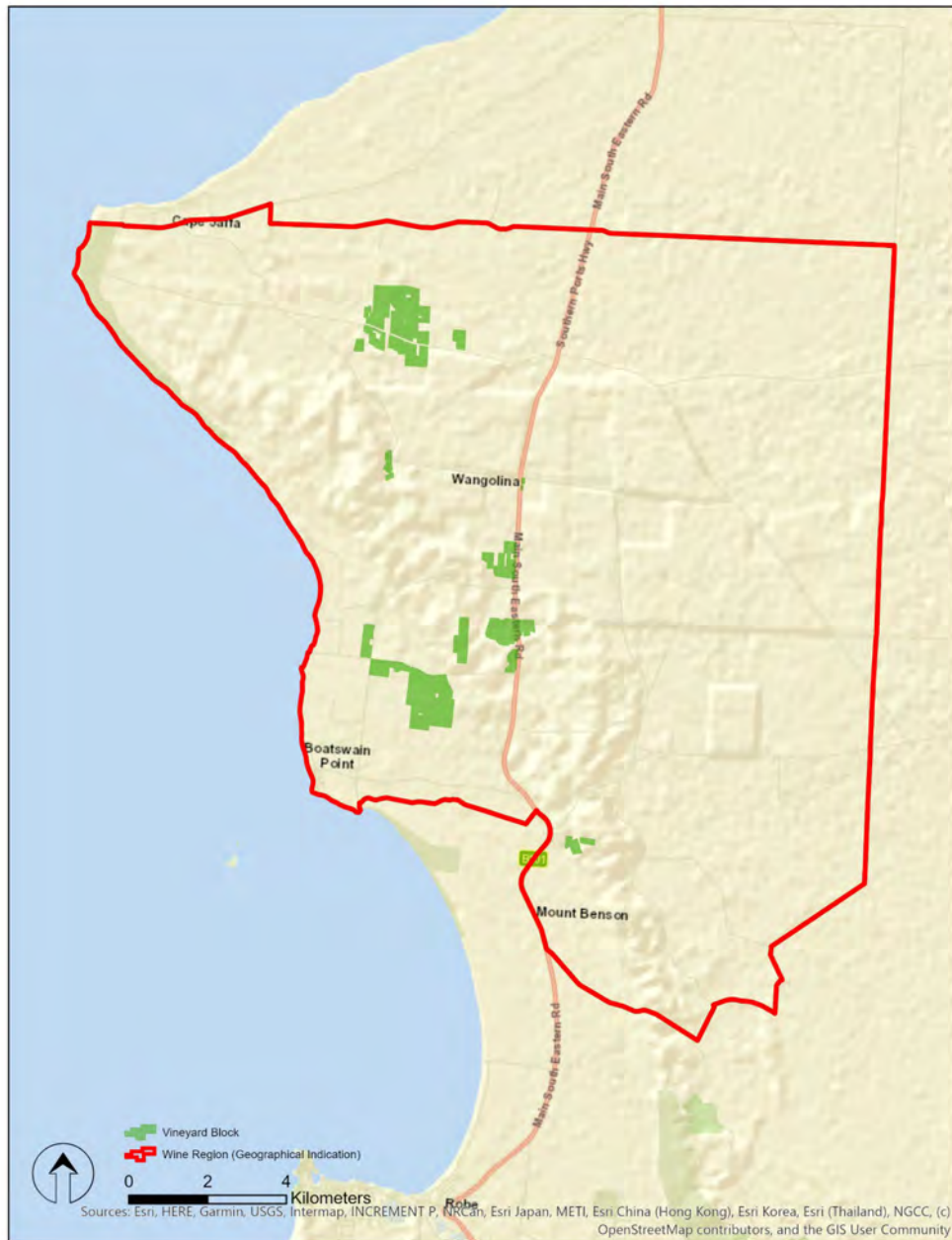
Source:
Vinehealth
Australia

McLaren Vale

Current plantings by variety and year planted – whites and others

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
White winegrapes						
Chardonnay	256	0	0	0	256	0%
Chenin Blanc	13	0	0	0	13	0%
Fiano	35	8	16	7	68	10%
Grenache Blanc	3	0	0	1	4	25%
Muscat A Petit Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris	23	3	0	0	26	0%
Riesling	26	0	0	0	26	0%
Roussanne	12	0	0	0	12	0%
Sauvignon Blanc	38	0	0	0	38	0%
Semillon	15	0	0	0	15	0%
Verdelho	15	0	0	0	15	0%
Vermentino	6	0	0	0	6	0%
Viognier	47	0	0	3	49	6%
Other White	30	1	1	1	33	3%
White winegrapes Total	529	12	18	12	571	2%
Unknown variety	165	0	0	0	165	0%
Rootstock	4	0	0	0	4	0%
Multi-purpose white	0	0	0	0	0	
Table red	0	0	0	0	0	
All varieties Total	7,245	56	48	34	7,383	1%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

Mount Benson Wine Region

Wine Australia July 2024

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

Mount Benson Wine Region



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Mount Benson

Vintage overview

VINTAGE REPORT

Mount Benson Vintage 2024 was challenging.

After three lower rainfall years, a fourth came along with winter rains stopping in mid-July. A dry mild spring followed, with budburst primarily in early to mid-September. The mild spring contributed to good early shoot growth. Frost wise, Mount Benson fared better than most regions with no to minimal frost damage this year. The long mild growing season has seen our white grapes ripen steadily.

This has produced wines with great natural acidity, aromatic and full flavour profiles. The warmer weather prior to Easter helped with ripening of reds, many were able to be picked at slightly lower Baume while having full flavour, though the wines may end up a bit lighter.

The overall yields of both red and whites were down by 40%. The flow on effects of the Chinese tariffs saw some grapes remain unharvested. The ongoing dry conditions meant that more irrigation was applied as well.

In all, another challenging year in the vineyard and winery.

Jason Dodson

Mount Benson Vignerons' Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Mount Benson winegrapes in 2024 was 2,147 tonnes, down by 21 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Mount Benson has been 2,932 tonnes, making this year's crush 27 per cent below the five-year average.

There were 8 respondents to the survey who reported crushing grapes from the Mount Benson in 2024, compared with 9 in 2023.

The total value of winegrapes in 2024 was \$2.3 million, compared with \$2.2 million in 2023, an increase of 4 per cent. The reduction in tonnes was partly offset by an increase in the overall average value, which increased by 31 per cent from \$847 in 2023 to \$1,113 per tonne.

The average value for Shiraz was static at \$1014 per tonne, while the average value for Sauvignon Blanc, the largest white variety, was up 26 per cent to \$1323 per tonne. The overall increase was larger than either of these individual increases as a result of an increased share of (higher-valued) white varieties in the mix.

The price dispersion data shows an upward shift in prices paid, with 52 per cent of all grapes being purchased at more than \$900 per tonne compared with 35 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in Mount Benson as at 30 April 2024 was 506 hectares, the same as the previous year and only marginally more than it was in 2019 (up by 3 hectares).

There was just 1 hectare of new vines planted in the region in the 2023–24 season compared with 4 in the previous season.

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 share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Cabernet Franc					3	100%	3	\$4,315
Cabernet Sauvignon	93				177	65%	270	\$262,795
Merlot	47				284	86%	331	\$235,509
Petit Verdot					3	100%	3	\$3,599
Pinot Noir					6	100%	6	\$14,581
Shiraz	396	\$419,983	\$1,060	0%	223	36%	619	\$656,019
Red Total	537	\$544,349	\$1,014	0%	694	56%	1,231	\$1,176,817
White								
Chardonnay	37				157	81%	195	\$233,712
Pinot Gris/Grigio	22				192	90%	214	\$256,656
Riesling					17	100%	17	\$26,127
Sauvignon Blanc	235	\$310,933	\$1,323	26%	249	51%	484	\$640,861
Semillon	5						5	\$4,344
White Total	299	\$385,943	\$1,289	19%	616	67%	915	\$1,161,700
Grand Total	836	\$930,292	\$1,113	31%	1,310	61%	2,147	\$2,338,517

There were 8 respondents to the survey who reported crushing grapes from Mount Benson in 2024, compared with 9 in 2023.

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-<\$900	\$900-<\$1500	\$1500-<\$2000	Total purchased
Red				
Cabernet Sauvignon	75		18	93
Merlot	47			47
Shiraz	269	36	91	396
Red Total	392	36	108	537
White				
Chardonnay		37		37
Pinot Gris/Grigio		22		22
Sauvignon Blanc		139	96	235
Semillon	5			5
White Total	5	198	96	299
Total purchased	397	234	205	836

Mount Benson

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	113	0	0	0	113	0%
Merlot	50	0	0	0	50	0%
Shiraz	187	0	0	0	187	0%
Other Red	5	0	4	0	9	0%
Red winegrapes Total	355	0	4	0	359	0%
White winegrapes						
Chardonnay	33	0	0	0	33	0%
Pinot Gris	42	0	0	0	42	0%
Sauvignon Blanc	61	0	0	0	61	0%
Other White	11	0	0	1	12	8%
White winegrapes Total	147	0	0	1	148	1%
All varieties Total	502	0	4	1	506	0%

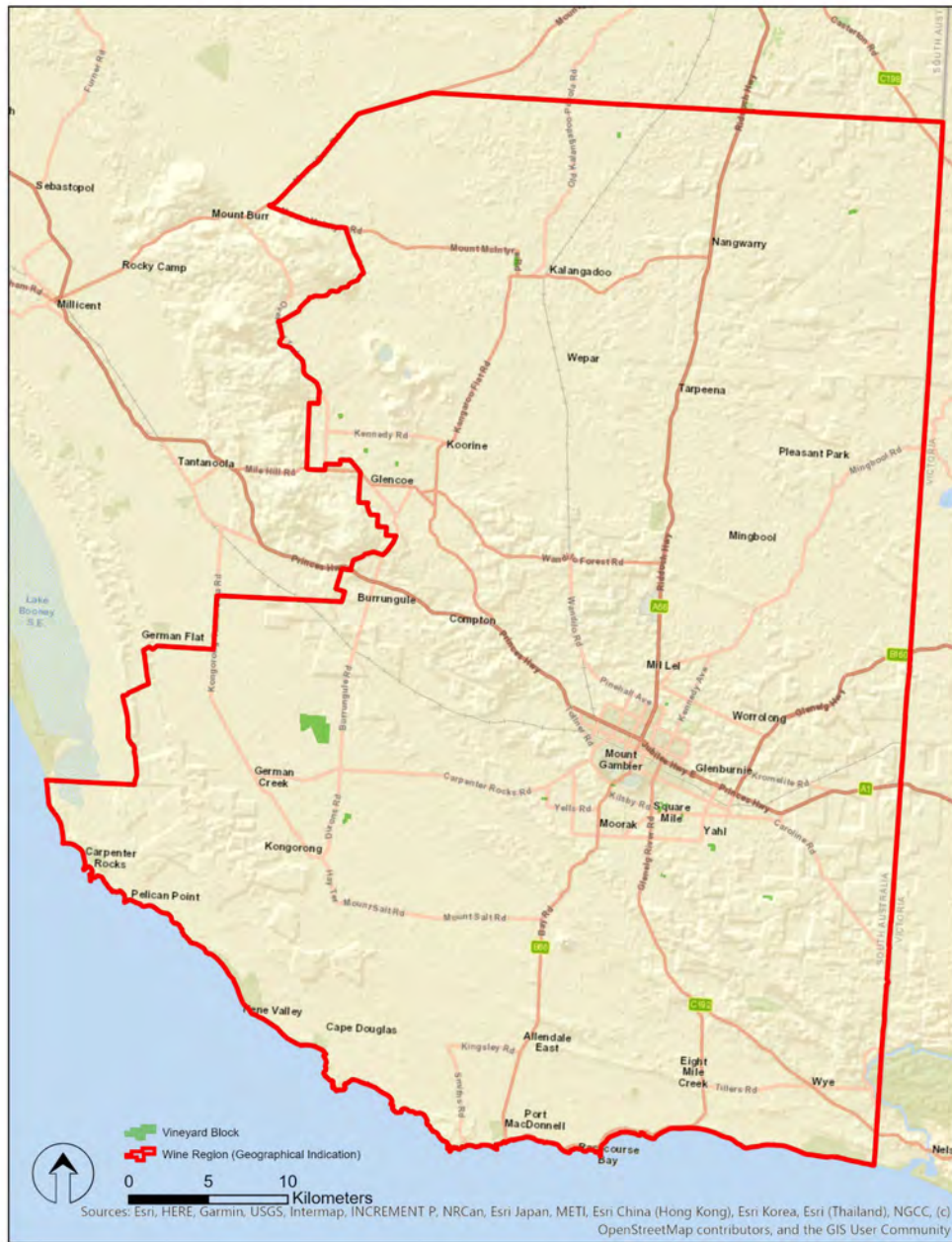
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2024

Regional Summary Report

Mount Gambier Wine Region

Wine Australia July 2024



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

Mount Gambier Wine Region



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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	121	\$261,213	\$2,163	4%	12	9%	133	\$287,213
Red Total	121	\$261,213	\$2,163	4%	12	9%	133	\$287,213
White								
Chardonnay	112	\$175,762	\$1,568	1%			112	\$175,762
Pinot Gris/Grigio	13				7	35%	20	\$37,302
Riesling	22				7	24%	29	\$54,232
Sauvignon Blanc	465	\$758,646	\$1,632	3%			465	\$758,646
White Total	612	\$999,513	\$1,634	3%	14	2%	626	\$1,025,942
Grand Total	732	\$1,260,726	\$1,722	2%	26	3%	758	\$1,313,155

There were 12 respondents to the survey who reported crushing grapes from Mount Gambier in 2024, compared with 11 in 2023.

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

Varieties	Tonnes purchased in each segment			Total purchased
	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red				
Pinot Noir	16	65	40	121
Red Total	16	65	40	121
White				
Chardonnay	33	79		112
Pinot Gris/Grigio		5	8	13
Riesling		10	12	22
Sauvignon Blanc	62	402		465
White Total	95	496	20	612
Total purchased	111	561	60	732

Mount Gambier

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	0%
Pinot Noir	67	0	0	0	67	0%
Other Red	0	0	0	0	0	
Red winegrapes Total	76	0	0	0	76	0%
White winegrapes						
Chardonnay	40	0	0	0	40	0%
Pinot Gris	14	0	0	0	14	0%
Sauvignon Blanc	95	0	0	0	95	0%
Other White	6	0	0	0	6	0%
White winegrapes Total	156	0	0	0	156	0%
Unknown variety	17	0	0	0	17	0%
All varieties Total	249	0	0	0	249	0%

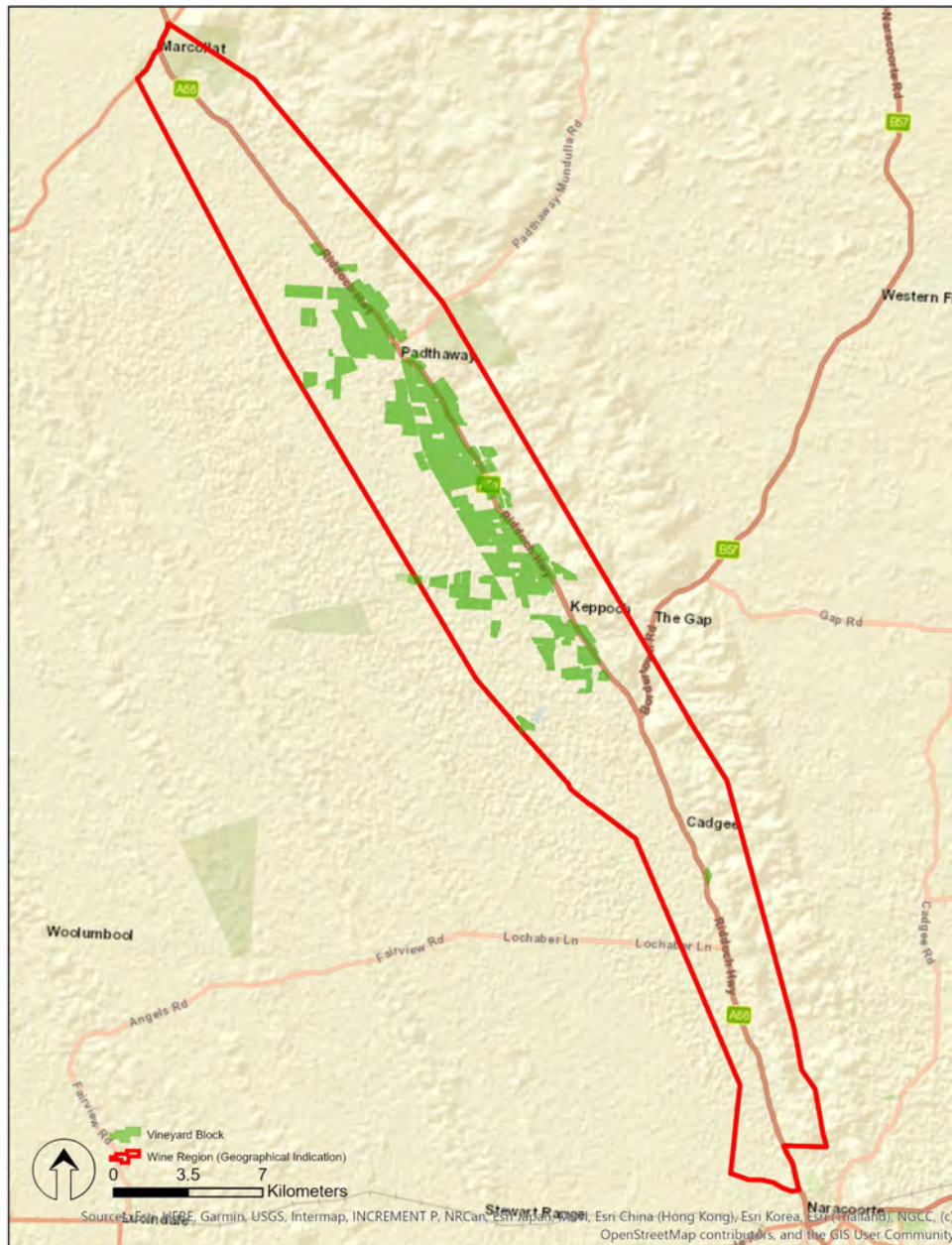
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2024

Regional Summary Report

Padthaway Wine Region

Wine Australia July 2024



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

Padthaway Wine Region



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Padthaway

Vintage overview

VINTAGE REPORT

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

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

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

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

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

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

OVERVIEW OF VINTAGE STATISTICS

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

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

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

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

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

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

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

Padthaway

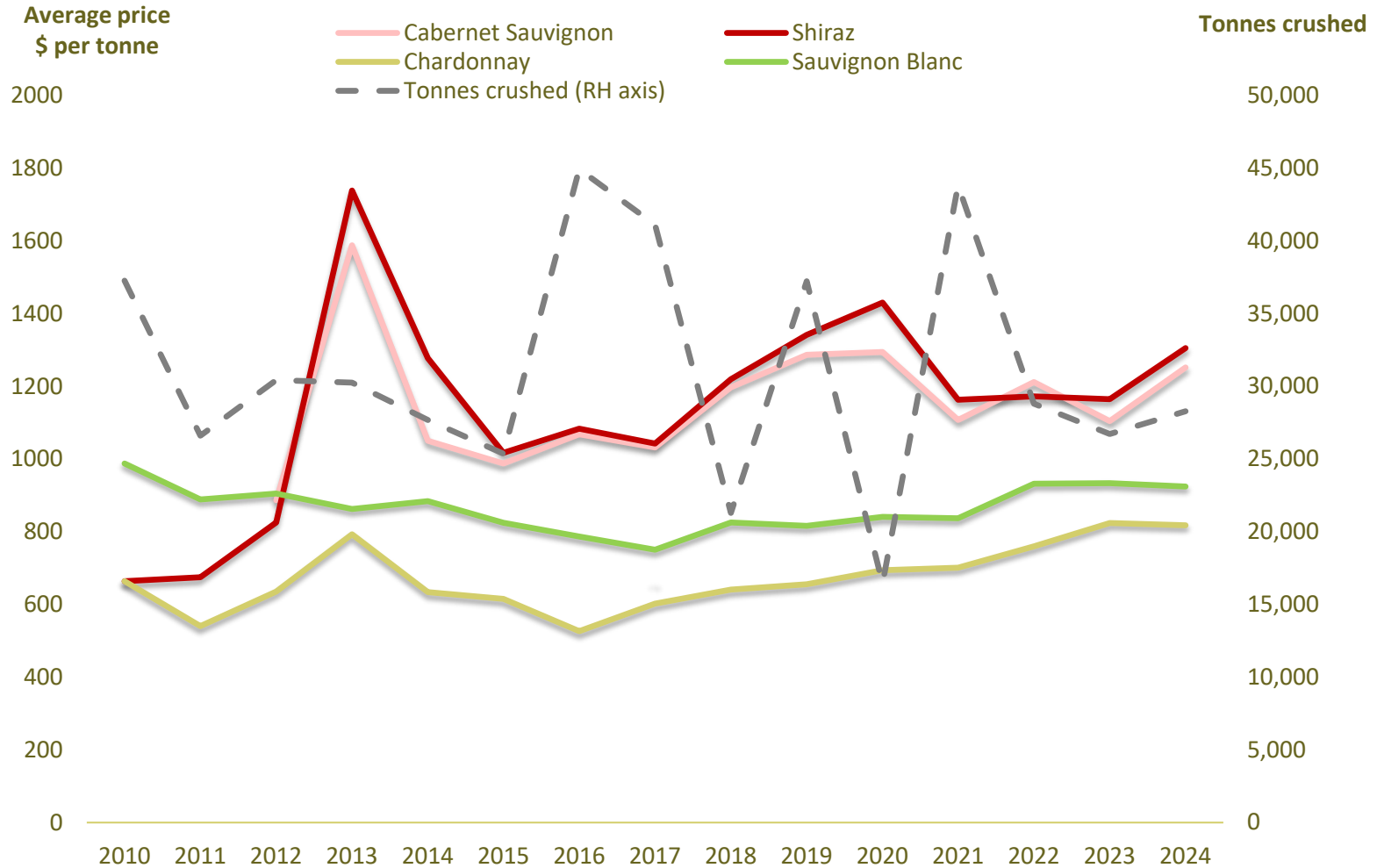
Winegrape intake summary table

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

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

Padthaway

Historical weighted average price vs tonnes crushed



Padthaway

Price dispersion – purchased grapes

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Cabernet Sauvignon	42	338	2,731	1,013		4,124
Graciano			6			6
Malbec			1,242			1,242
Merlot	112	563				674
Pinot Noir			440	428		868
Sangiovese			50			50
Shiraz	245	493	3,843	727	323	5,631
Tempranillo					5	5
Red Total	398	1,394	8,311	2,169	328	12,600
White						
Chardonnay		3,944	1,132			5,075
Gewürztraminer		68	5			73
Pinot Gris/Grigio		249	1,838			2,088
Riesling		1,526				1,526
Sauvignon Blanc		209	768			977
Verdelho			115			115
Viognier			53			53
White Total		5,996	3,910			9,906
Total purchased	398	7,390	12,221	2,169	328	22,506

Padthaway

Current plantings by variety and year planted

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

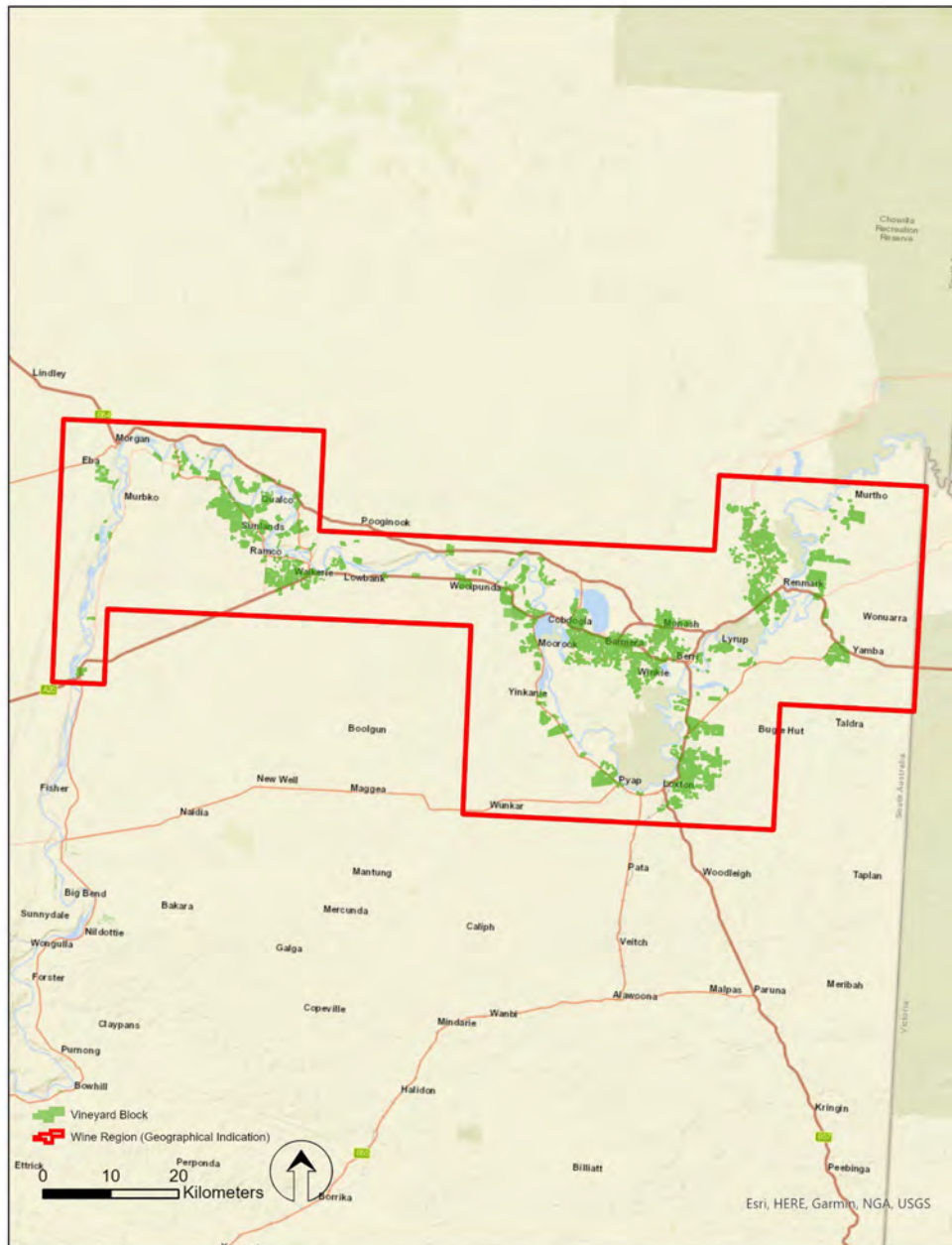
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2024

Regional Summary Report

Riverland Wine Region

Wine Australia July 2024



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

Riverland Wine Region



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Riverland

Vintage overview

VINTAGE REPORT

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

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

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

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

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

Charles Matheson
Grower Engagement Officer, Riverland Wine

OVERVIEW OF VINTAGE STATISTICS

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

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

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

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

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

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

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

Riverland

Winegrape intake summary table – reds

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

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

Riverland

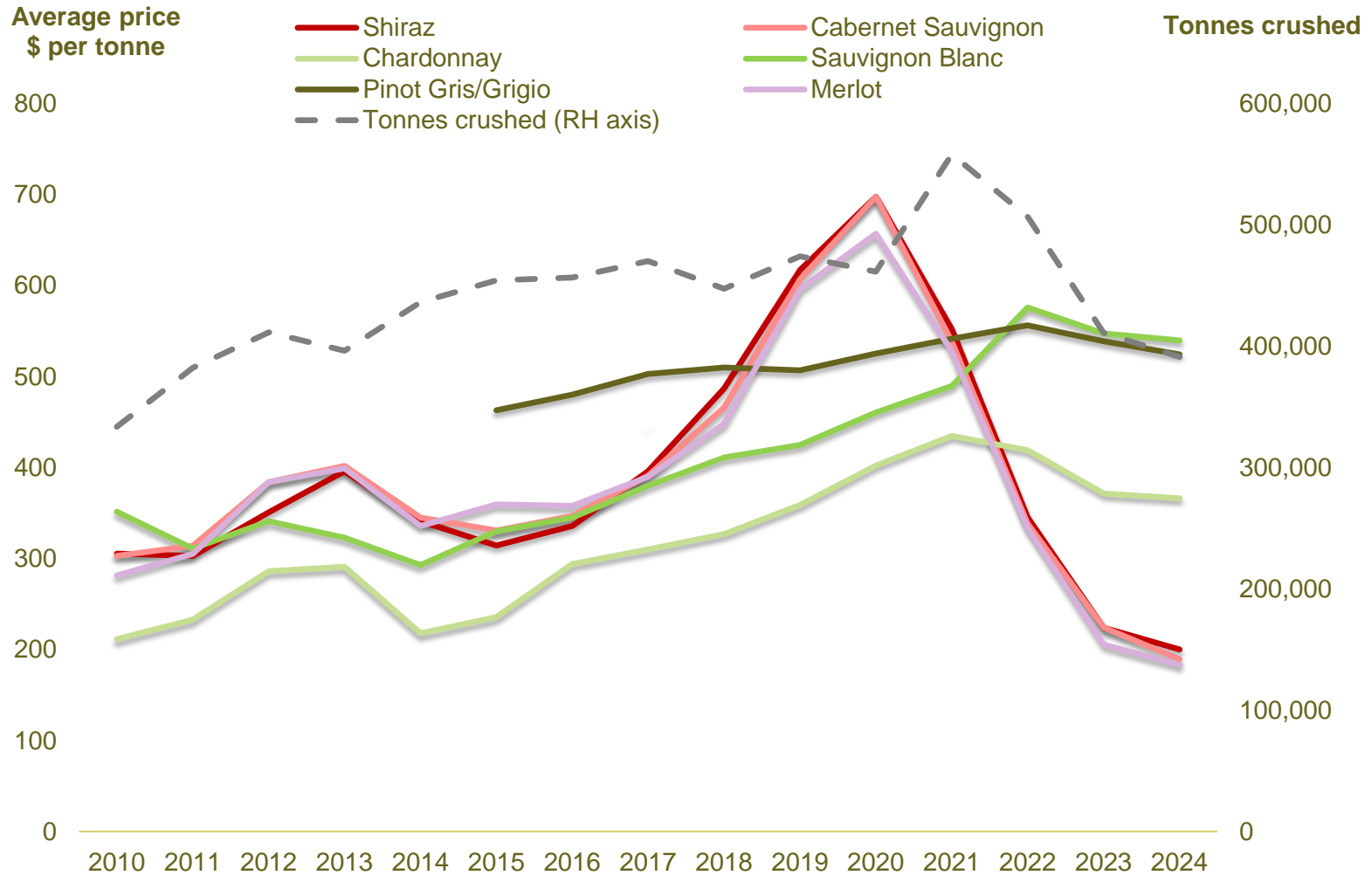
Winegrape intake summary table – whites

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

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

Riverland

Historical weighted average price vs tonnes crushed



Riverland

Price dispersion – purchased grapes (red)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera	6					6
Cabernet Franc	4					4
Cabernet Sauvignon	31,171	147				31,318
Durif	720	128				847
Graciano	3	18				20
Grenache	3,402	179	18			3,600
Lagrein	5		4			9
Malbec	46					46
Mataro/Mourvedre	1,774	342				2,115
Merlot	10,913					10,913
Montepulciano	173	53	20			246
Muscat à Petits Grains Rouges	107					107
Nebbiolo	2					2
Nero d'Avola		1				1
Petit Verdot	4,938	36				4,975
Pinot Noir	218	6,044	307			6,569
Ruby Cabernet	897					897
Sangiovese	121					121
Shiraz	58,229	1,170	122			59,521
Tempranillo	515	12	22			549
Touriga Nacional	26					26
Other red	2,628	310	2		3	2,942
Red Total	115,895	8,440	495		3	124,833

Riverland

Price dispersion – purchased grapes (white)

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

Riverland

Current plantings by variety and year planted - reds

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

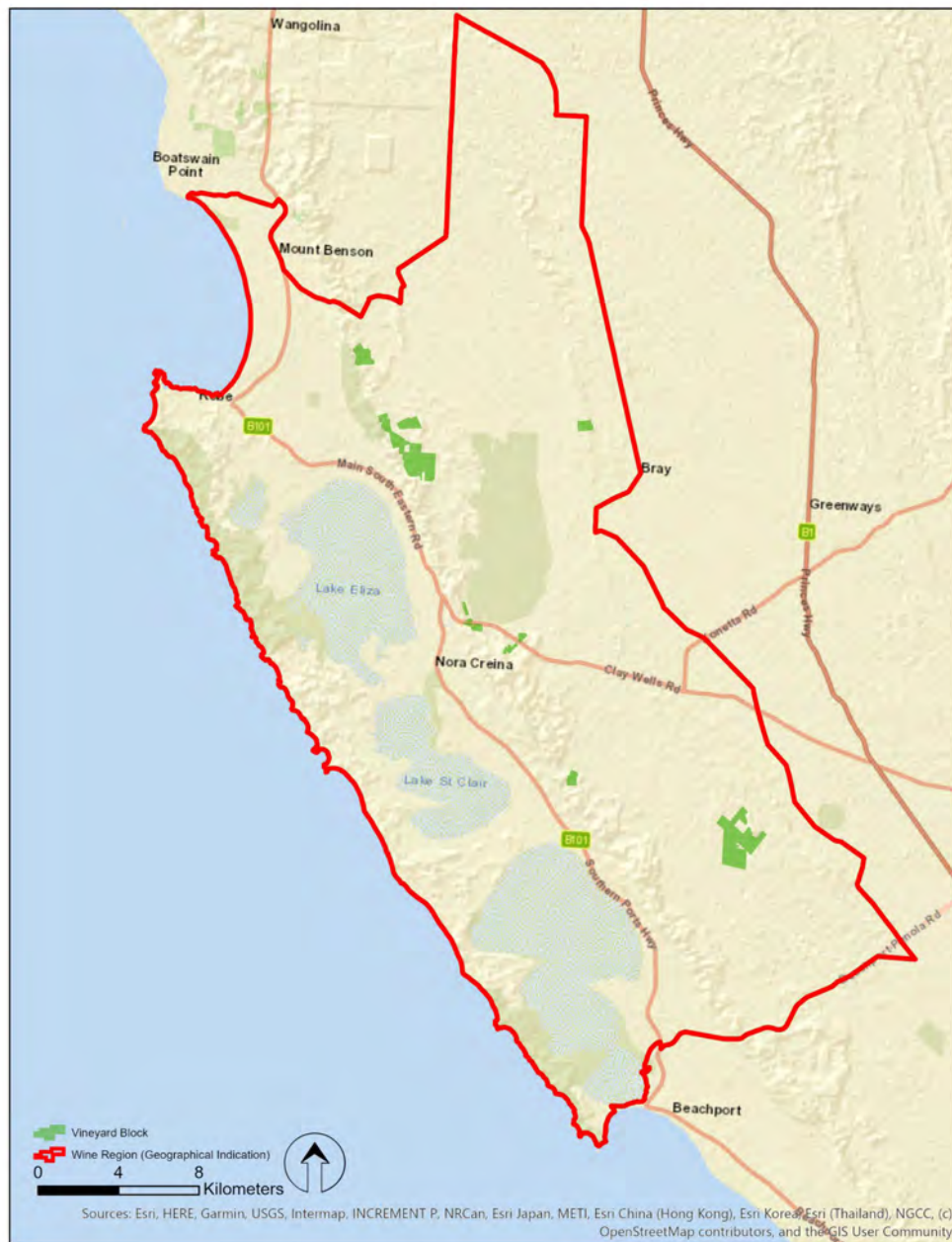
Source:
Vinehealth
Australia

Riverland

Current plantings by variety and year planted – whites and other

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
White winegrapes						
Chardonnay	4,134	1	26	4	4,165	0%
Chenin Blanc	68	0	0	0	68	0%
Colombard	675	0	0	0	676	0%
Doradillo	30	0	0	0	30	0%
Fiano	14	0	0	4	17	24%
Muscadelle (Tokay)	4	0	0	0	4	0%
Muscat A Petit Grains Blanc (White Frontignac)	98	0	0	0	98	0%
Muscat Gordo Blanco	786	0	0	0	786	0%
Palomino	5	0	0	0	5	0%
Pedro Ximenez	4	0	0	0	4	0%
Pinot Gris	289	0	5	11	305	4%
Prosecco	0	1	6	9	16	56%
Riesling	80	0	0	1	81	1%
Sauvignon Blanc	564	18	34	33	649	5%
Savagnin	8	0	3	0	11	0%
Semillon	292	0	2	1	294	0%
Sultana	84	0	0	0	84	0%
Traminer (Gewurztraminer)	71	0	0	0	71	0%
Trebbiano	12	0	0	0	12	0%
Verdelho	81	0	0	0	81	0%
Vermentino	16	0	0	0	16	0%
Viognier	90	0	0	12	102	12%
Other White	31	0	4	0	35	0%
White winegrapes Total	7,437	20	79	75	7,611	1%
Unknown variety	695	0	0	0	695	0%
Rootstock	26	0	0	0	26	0%
Multi-purpose red	59	0	0	0	59	0%
Multi-purpose white	64	0	0	0	64	0%
Table red	14	0	1	0	15	0%
Table white	9	0	0	0	9	0%
Total area	19,932	148	157	89	20,326	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

Robe Wine Region

Wine Australia July 2024

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



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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	57				426	88%	483	\$802,504
Merlot					15	100%	15	\$13,991
Pinot Noir					646	100%	646	\$1,585,000
Shiraz	78				614	89%	692	\$1,034,835
Tempranillo					10	100%	10	\$17,292
Red Total	135				1,710	93%	1,846	\$3,453,621
White								
Chardonnay					897	100%	897	\$1,322,906
Pinot Gris/Grigio	30						30	\$48,000
Sauvignon Blanc					132	100%	132	\$191,607
Semillon					64	100%	64	\$78,015
White Total	30				1,093	97%	1,123	\$1,640,528
Grand Total	165	\$259,556	\$1,571	0%	2,803	94%	2,969	\$5,094,149

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

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
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	2	0	0	7	0%
Red winegrapes Total	461	2	0	0	464	0%
White winegrapes						
Chardonnay	110	0	0	0	110	0%
Sauvignon Blanc	10	0	0	0	10	0%
Other White	18	0	0	0	18	0%
White winegrapes Total	138	0	0	0	138	0%
All varieties Total	599	2	0	0	602	0%

Source:
Vinehealth
Australia



SA Winegrape Crush Survey 2024

Regional Summary Report

Southern Fleurieu Wine Region

Wine Australia July 2024

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

Southern Fleurieu Wine Region



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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	15				15	51%	30	\$29,580
Pinot Noir	19				6	24%	25	\$41,903
Shiraz	55						55	\$51,873
Tempranillo	3						3	\$4,410
Red Total	91	\$102,847	\$1,124	-14%	21	19%	112	\$127,766
White								
Chardonnay	46						46	\$29,284
Pinot Gris/Grigio	12						12	\$12,929
Sauvignon Blanc	8						8	\$5,908
White Total	66	\$48,121	\$726	-35%			66	\$48,121
Grand Total	158	\$150,968	\$957	-22%	21	12%	179	\$175,886

There were 7 respondents to the survey who reported crushing grapes from Southern Fleurieu in 2024, compared with 8 in 2023.

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			15			15
Pinot Noir			8	8	4	19
Shiraz		33	22			55
Tempranillo				3		3
Red Total		33	44	11	4	91
White						
Chardonnay	33	13				46
Pinot Gris/Grigio			12			12
Sauvignon Blanc		8				8
White Total	33	22	12			66
Total purchased	33	54	56	11	4	158

Southern Fleurieu

Current plantings by variety and year planted

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	73	0	0	0	73	0%
Malbec	1	0	0	0	1	0%
Merlot	35	0	0	0	35	0%
Pinot Noir	27	0	0	0	27	0%
Shiraz	127	0	0	0	127	0%
Other Red	4	0	0	0	4	0%
Red winegrapes Total	266	0	0	0	266	0%
White winegrapes						
Chardonnay	67	0	0	0	67	0%
Pinot Gris	25	0	0	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%
White winegrapes Total	181	0	0	0	181	0%
All varieties Total	447	0	0	0	447	0%

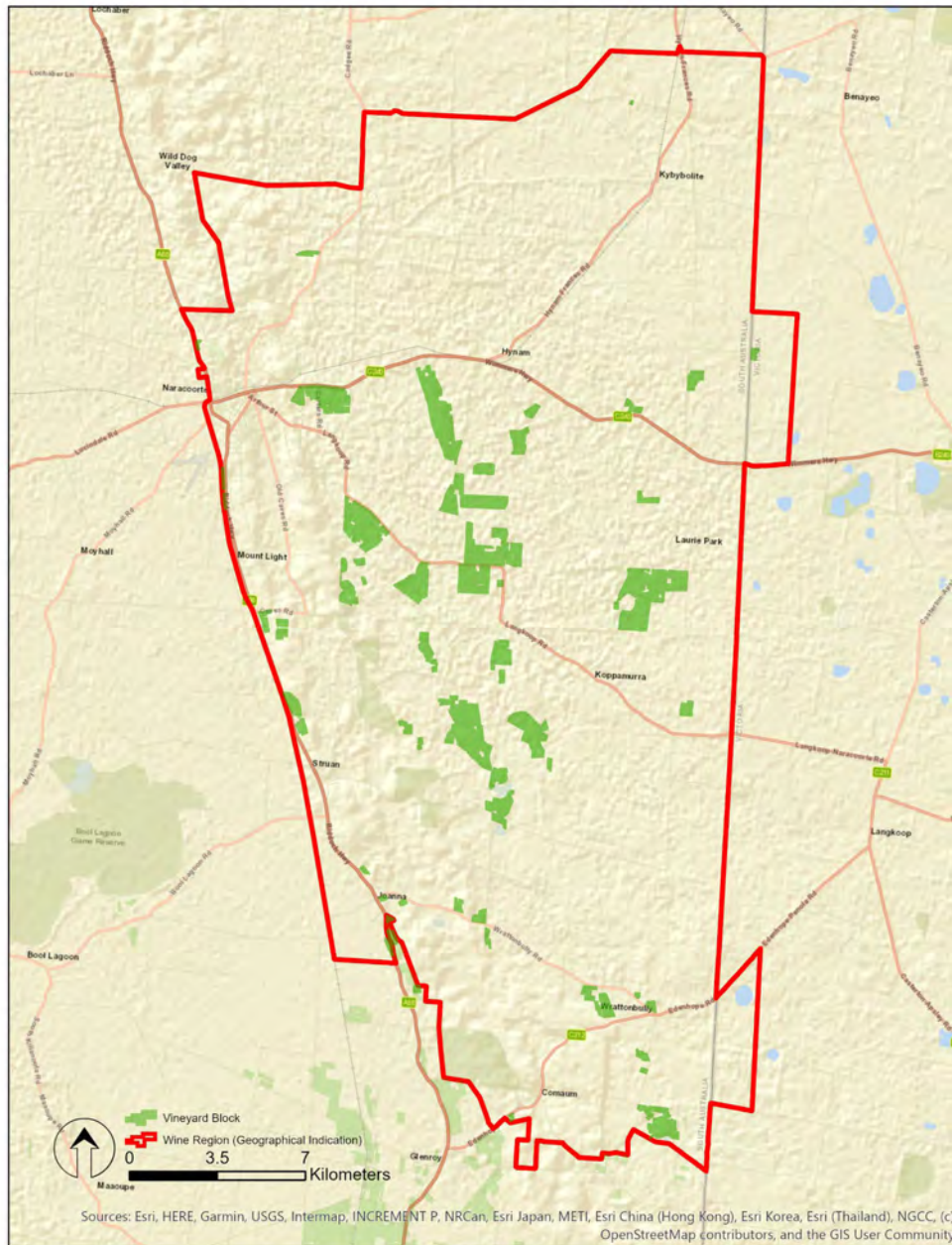
Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2024

Regional Summary Report

Wrattonbully Wine Region

Wine Australia July 2024



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

Wrattonbully Wine Region



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Wrattobully

Vintage overview

VINTAGE REPORT

The 2024 Vintage in Wrattobully was early relative to recent vintages, but back to a more traditional timeframe.

Winter started out wet in June but soon dried out with drier than normal conditions in July and August. These conditions continued into the start of spring, leading to an early budburst and good early growth in all varieties.

Good canopy growth continued during spring and early summer with the help of some large rain events which varied greatly from site to site throughout the region. Unfortunately, there were isolated hail events that affected some vineyards in the western part of the region. Flowering was early and progressed quickly for most varieties, while set varied from vineyard to vineyard but in general was good.

Disease pressure increased significantly leading up to Christmas with several large rain events resulting in spray programs having to be shortened to mitigate the risks. Fortunately, the weather dried up in early January, a relief for many growers and winemakers.

With the drier conditions the white harvest commenced in late February for some sparkling base; quickly followed on into dry whites from early to mid-March. The very favourable weather conditions followed by a heat spike over a few days resulted in the red harvest closely following over the next month in a compressed picking window.

From all reports at this early stage, the wines look fresh and vibrant displaying characters of a cooler vintage, not unlike 2004 according to winemakers. Cabernet is looking particularly strong, a variety the region consistently produces well.

In closing the 2024 vintage will be remembered for perfect picking conditions from start to finish. It was fortunate that the rain stopped when it did, otherwise it might have been a whole different story.

Will Malone, Chairperson – Wrattobully Wine Region Association.

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Wrattobully winegrapes in 2024 was 15,268 tonnes, up by 15 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for the Wrattobully has been 20,835 tonnes, making this year's crush 27 per cent below the five-year average. It was the sixth-lowest crush in the past 20-year period.

There were 20 respondents to the survey who reported crushing grapes from the Wrattobully in 2024, compared with 22 in 2023.

The total value of winegrapes in 2024 was \$20.4 million, compared with \$15.6 million in 2023, an increase of 31 per cent. The increase was driven by the increased production combined with an increase of 14 per cent in the overall average value, which was up by 14 per cent from \$1,172 per tonne in 2023 to \$1,336 per tonne.

All varieties increased in average value except for Pinot Gris/Grigio which was down 1 per cent to \$1280 per tonne. Cabernet Sauvignon was up 21 per cent to \$1550 per tonne, Shiraz was up 15 per cent to \$1402 per tonne and Chardonnay was up 25 per cent to \$1023 per tonne.

The price dispersion showed an upward shift, with 26 per cent of grapes purchased at \$1500 per tonne or more, compared with 20 per cent in 2023.

According to Vinehealth Australia data, the total vineyard area in Wrattobully as at 30 April 2024 was 2,600 hectares, a decrease of 151 hectares compared with the previous year and 78 less than it was in 2019. The average vineyard size in Wrattobully is 38.8 hectares, compared with the state average of 16.1 hectares.

There were 10 hectares of new plantings in the 2023–24 season (all of which were Cabernet Sauvignon), compared with 17 hectares in the previous season.

Wrattobully

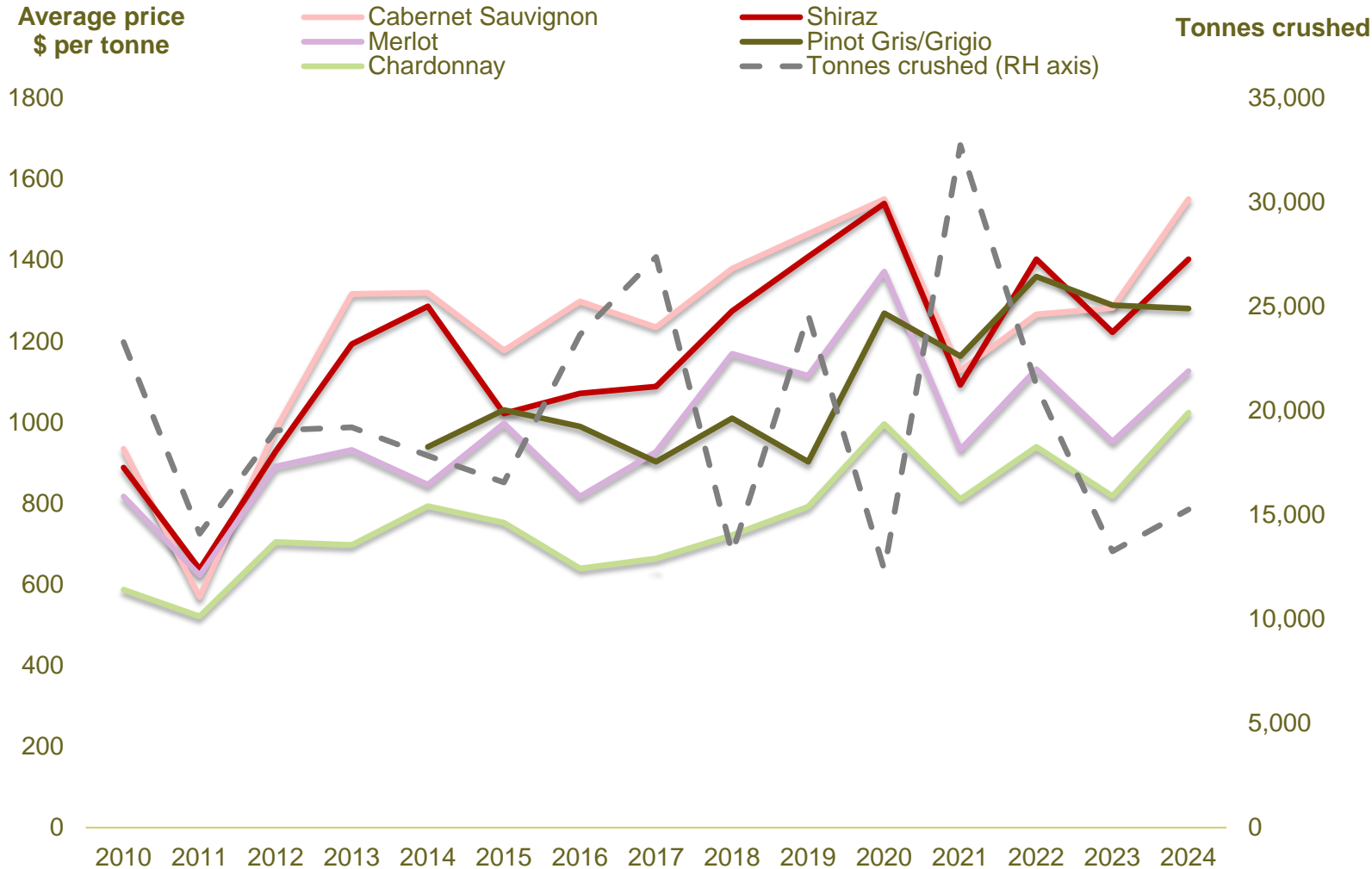
Winegrape intake summary table

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	2						2	\$4,176
Cabernet Franc	4				5	57%	8	\$15,770
Cabernet Sauvignon	2,751	\$4,264,988	\$1,550	21%	1,358	33%	4,109	\$6,369,472
Grenache					87	100%	87	\$171,389
Malbec	58	\$92,700	\$1,600	49%	90	61%	148	\$237,424
Merlot	1,045	\$1,177,288	\$1,127	18%	592	36%	1,637	\$1,843,862
Petit Verdot	14						14	\$24,844
Pinot Noir	824	\$1,040,257	\$1,263	4%	167	17%	991	\$1,251,014
Sangiovese					51	100%	51	\$76,767
Shiraz	2,580	\$3,617,333	\$1,402	15%	1,214	32%	3,794	\$5,319,613
Tempranillo	33						33	\$70,140
Red Total	7,311	\$10,298,471	\$1,409	16%	3,564	33%	10,875	\$15,384,471
White								
Chardonnay	1,274	\$1,303,786	\$1,023	25%	661	34%	1,935	\$1,980,000
Fiano	9						9	\$17,320
Gewürztraminer	2						2	\$2,720
Pinot Gris/Grigio	1,269	\$1,624,381	\$1,280	-1%	260	17%	1,529	\$1,956,952
Prosecco	24						24	\$24,100
Riesling	22				73	77%	95	\$81,015
Sauvignon Blanc	187	\$198,865	\$1,062	13%	474	72%	661	\$702,104
Semillon					69	100%	69	\$84,109
Viognier	4				66	94%	70	\$126,126
White Total	2,792	\$3,198,096	\$1,146	11%	1,602	36%	4,394	\$4,974,446
Grand Total	10,103	\$13,496,567	\$1,336	14%	5,166	34%	15,268	\$20,358,917

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

Wrattenbully

Historical weighted average price vs tonnes crushed



Wrattobully

Price dispersion – purchased grapes

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera					2	2
Cabernet Franc				4		4
Cabernet Sauvignon	24	135	1,360	940	293	2,751
Malbec			26	8	24	58
Merlot		188	768	89		1,045
Petit Verdot				14		14
Pinot Noir			595	229		824
Shiraz		211	1,643	577	149	2,580
Tempranillo					33	33
Red Total	24	533	4,393	1,860	501	7,311
White						
Chardonnay	37	488	589	160		1,274
Fiano					9	9
Gewürztraminer			2			2
Pinot Gris/Grigio			1,236	33		1,269
Prosecco			24			24
Riesling		22				22
Sauvignon Blanc		78	83	27		187
Viognier				4		4
White Total	37	588	1,934	224	9	2,792
Total purchased	61	1,121	6,326	2,085	510	10,103

Wrattobully

Current plantings by variety and year planted

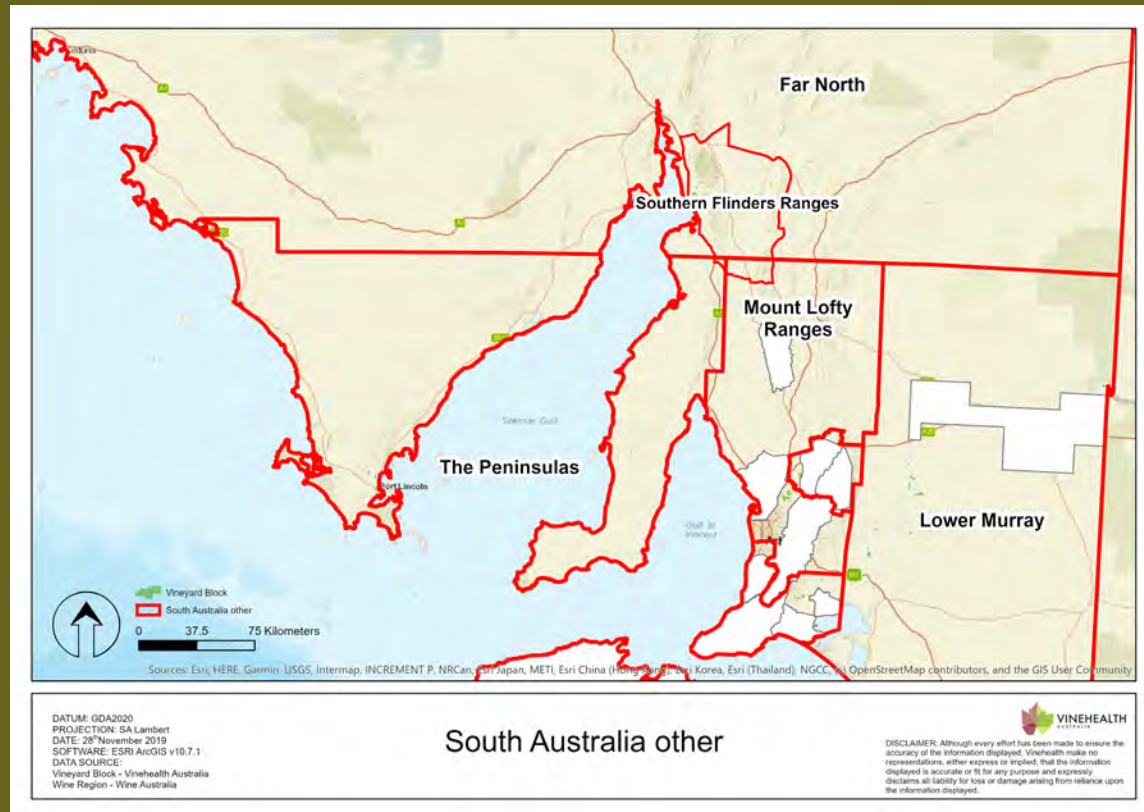
Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	1,173	13	3	10	1,199	1%
Malbec	11	0	0	0	11	0%
Merlot	202	0	0	0	202	0%
Pinot Noir	63	0	0	0	63	0%
Shiraz	737	9	6	0	752	0%
Tempranillo	9	1	0	0	10	0%
Other Red	16	0	0	0	16	0%
Red winegrapes Total	2,210	24	9	10	2,252	0%
White winegrapes						
Chardonnay	154	0	0	0	154	0%
Pinot Gris	99	8	0	0	107	0%
Sauvignon Blanc	50	0	0	0	50	0%
Other White	22	0	8	0	30	0%
White winegrapes Total	325	8	8	0	341	0%
Unknown variety	6	0	0	0	6	0%
All varieties Total	2,541	32	17	10	2,600	0%

Source:
Vinehealth
Australia

SA Winegrape Crush Survey 2024

GI Summary Report

SA – other



Wine Australia July 2024

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	309	\$92,904	\$300	53%	1	0%	311	\$93,328
Grenache	16						16	\$7,810
Merlot	189	\$45,550	\$242	13%			189	\$45,550
Shiraz	736	\$140,875	\$191	27%	18	2%	754	\$144,243
Red Total	1,250	\$287,140	\$230	37%	19	1%	1,269	\$290,931
White								
Chardonnay	803	\$286,924	\$357	-7%	12	2%	815	\$291,362
Colombard	40				13	25%	53	\$15,260
Muscat Gordo Blanco	35				23	40%	58	\$16,779
Pinot Gris/Grigio	112	\$60,822	\$545	-1%			112	\$60,822
Riesling	14						14	\$5,688
Sauvignon Blanc	152	\$82,870	\$546	-2%	20	12%	172	\$93,953
White Total	1,155	\$457,828	\$396	-11%	69	6%	1,224	\$483,865
Grand Total	2,405	\$744,968	\$310	12%	88	4%	2,493	\$774,795

There were 9 respondents to the survey who reported crushing grapes from Lower Murray Zone – other in 2024, compared with 7 in 2023.

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)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	61	0	0	0	61	0%
Merlot	18	0	0	0	18	0%
Shiraz	141	0	0	0	141	0%
Other Red	18	0	0	0	18	0%
Red winegrapes Total	238	0	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%
Riesling	10	0	0	0	10	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	6	0	0	0	6	0%
White winegrapes Total	112	0	0	0	112	0%
Unknown variety	16	0	0	0	16	0%
All varieties Total	366	0	0	0	366	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								
Mataro/Mourvedre	19						19	\$52,080
Montepulciano	2						2	\$3,111
Nebbiolo	16						16	\$22,736
Sangiovese	97	\$142,360	\$1,475	-0%			97	\$142,360
Shiraz	342				27	7%	369	\$501,176
Tempranillo					1	100%	1	\$1,471
Red Total	475	\$684,391	\$1,441	1%	28	6%	503	\$722,934
Grand Total	475	\$684,391	\$1,441	1%	28	6%	503	\$722,934

There were 7 respondents to the survey who reported crushing grapes from Mount Lofty Ranges zone – other in 2024, compared with 6 in 2023.

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	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	72	0	0	0	72	0%
Grenache	4	0	0	0	4	0%
Mataro (Mourvedre)	7	0	0	0	7	0%
Merlot	6	0	0	0	6	0%
Montepulciano	3	1	0	0	4	0%
Petit Verdot	6	0	0	0	6	0%
Sangiovese	12	0	0	0	12	0%
Shiraz	198	0	0	1	199	1%
Tempranillo	5	0	0	0	5	0%
Other Red	7	0	0	0	7	0%
Red winegrapes Total	320	1	0	1	322	0%
White winegrapes						
Chardonnay	4	0	0	0	4	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	5	0	0	0	5	0%
Viognier	1	0	0	0	1	0%
Other White	2	0	0	0	2	0%
White winegrapes Total	19	0	0	0	19	0%
Unknown variety	17	0	0	0	17	0%
All varieties Total	355	1	0	1	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	4						4	\$2,912
Shiraz	147						147	\$124,334
Red Total	151						151	\$127,246
White								
Riesling					1	100%	1	\$1,551
White Total					1	100%	1	\$1,551
Grand Total	151				1	1%	152	\$128,797

There were 3 respondents to the survey who reported crushing grapes from Southern Flinders Ranges in 2024, compared with 4 in 2023.

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

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	9	0	0	0	9	0%
Merlot	6	0	0	0	6	0%
Shiraz	123	0	10	0	133	0%
Other Red	0	0	0	0	0	
Red winegrapes Total	138	0	10	0	148	0%
White winegrapes						
Other White	1	0	0	0	1	0%
White winegrapes Total	1	0	0	0	1	0%
Unknown variety	26	0	0	0	26	0%
All varieties Total	164	0	10	0	174	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	46				4	7%	49	\$98,389
Merlot					3	100%	3	\$2,505
Shiraz	116				14	11%	130	\$253,147
Red Total	162				20	11%	182	\$354,041
White								
Chardonnay					4	100%	4	\$6,092
Riesling					8	100%	8	\$12,792
Sauvignon Blanc					12	100%	12	\$17,720
Semillon					6	100%	6	\$7,298
Viognier					5	100%	5	\$6,935
White Total					35	100%	35	\$50,838
Grand Total	162				55	25%	217	\$404,879

There were 5 respondents to the survey who reported crushing grapes from the Peninsulas in 2024, compared with 4 in 2023.

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

Variety	Area (hectares)				Total area (Ha)	% planted in 2023
	Pre-2021	2021	2022	2023		
Red winegrapes						
Cabernet Sauvignon	10	0	0	0	10	0%
Merlot	2	0	0	0	2	0%
Shiraz	14	0	0	0	14	0%
Other Red	1	1	0	0	2	0%
Red winegrapes Total	26	1	0	0	27	0%
White winegrapes						
Chardonnay	2	0	0	0	2	0%
Riesling	3	1	0	0	4	0%
Sauvignon Blanc	2	0	0	0	3	0%
Other White	4	0	0	0	4	0%
White winegrapes Total	11	1	0	0	12	0%
Unknown variety	34	0	0	0	34	0%
All varieties Total	71	2	0	0	73	0%

Source:
Vinehealth
Australia

Explanations and definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from Wine Australia.

Total crush

The **total crushed** is the total tonnes of grapes reported to have been crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey in 2024 is 88 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

Reported fruit is separated into fruit produced from the winery's own, leased or associated vineyards ("own grown") and fruit purchased from other grape producers ("purchased").

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – not including specific amounts paid for freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2024).

The **calculated average purchase value** per tonne is the average amount paid per tonne of fruit across all wineries.

Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements.

Average and total purchase values are not reported where there are fewer than three purchasers of a variety in a particular region. However, the values are included in the calculation of totals for each region.

Important note on average purchase value

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices (price dispersion), differences in quality or variables that go into individual contracts.

Price dispersion data

All purchases for each variety are grouped into price segments according to the price paid for that batch of fruit. The sum of tonnes in all the price segments may not match the total tonnes purchased where there are tonnes reported without an associated price.

Estimated total value of all grapes

The estimated total value of all grapes is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value for the same variety across similar regions, or across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

Explanations and definitions - continued

PLANTING DATA

Source of planting data tables

Planting data is obtained from the vineyard register maintained by Vinehealth Australia.

Vinehealth Australia is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of vineyard owners in the state. Vineyard owners with plantings of 0.5 hectares or more are required to register with Vinehealth Australia, and provide details of any changes made to these vineyard plantings within three months of any such change. This information is kept strictly confidential and provided for this survey in a deidentified and aggregated manner.

For more information on the planting data in this report or about registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.

Explanatory notes for planting data tables

To protect confidentiality, the following rules are applied to reporting varieties:

- Where there are fewer than 10 registered owners with plantings of a particular variety across the state, that variety is not separately identified in either the state or the regional reports but is grouped with “other red/white”, AND
- Where there are fewer than three registered owners with a particular grape variety in a given region, that variety is not separately identified in the regional report but is grouped with “other red/white” unless it is a white variety listed in the top seven, or red variety in the top five by planted area for the state for the current year.
- Planting data tables are current as at 30 April 2024 and include all plantings from the 2023–24 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.

- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or top-worked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- The totals by year planted may not align with the total areas, as new plantings without a year are captured in the pre-2021 bucket, but not against the individual reported years.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.



Acknowledgements

AUSTRALIAN NATIONAL VINTAGE SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian wine sector National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association and Wine Grape Council SA.

The survey publication is available on the Vinehealth Australia website vinehealth.com.au and via links from the Wine Grape Council SA website wgcsa.com.au and the South Australian Wine Industry Association website www.winesa.asn.au.

Survey results from 2015 onwards are available on the Wine Australia interactive Vintage Survey Dashboard:

<https://marketexplorer.wineaustralia.com/vintage-survey>

Disclaimer

This information has been made available to assist on the understanding that Wine Australia is not rendering professional advice. Wine Australia does not accept responsibility for the results of any actions taken on the basis of the information contained in this report, nor for the accuracy, currency or completeness of any material contained in it. Wine Australia expressly disclaims all and any liability and responsibility to any person in respect of consequences of anything done in respect of reliance, whether wholly or in part, upon this report.

Note: data published in this report supercedes that in earlier reports. Minor variations in reported figures can occur due to data revisions.

Any questions about the report should be directed to:

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About Wine Australia

Wine Australia supports a competitive wine sector by investing in research and innovation, growing domestic and international markets, protecting the reputation of Australian wine.

Wine Australia is an Australian Commonwealth Government statutory authority, established under the *Wine Australia Act 2013*, and funded by grape growers and winemakers through levies and user-pays charges and the Australian Government, which provides matching funding for research development and adoption investments.

Credits

Image (Fleurieu vineyard) – Nigel Wood

GI maps – Vinehealth Australia

