

Lower Murray zone - other

Winegrape intake summary table

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Cabernet Sauvignon	638	\$124,778	\$196	-50%			638	\$124,778
Merlot	190	\$40,511	\$213	-38%			190	\$40,511
Shiraz	1,635	\$247,288	\$151	-57%			1,635	\$247,288
Red Total	2,463	\$412,576	\$168	-54%			2,463	\$412,576
White								
Chardonnay	840	\$322,246	\$384	-8%			840	\$322,246
Colombard	65						65	\$18,975
Muscat Gordo Blanco	35						35	\$10,208
Pinot Gris/Grigio	140	\$77,111	\$553	-5%			140	\$77,111
Riesling	17						17	\$7,650
Sauvignon Blanc	492	\$275,035	\$559	-4%			492	\$275,035
White Total	1,589	\$711,224	\$448	1%			1,589	\$711,224
Grand Total	4,052	\$1,123,800	\$277	-32%			4,052	\$1,123,800

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

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

Lower Murray zone - other

Current plantings by variety and year planted

Area (hectares)						
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Cabernet Sauvignon	61	0	0	0	61	0%
Grenache	2	0	0	0	2	0%
Merlot	18	0	0	0	18	0%
Petit Verdot	6	0	0	0	6	0%
Pinot Noir	1	0	0	0	1	0%
Shiraz	133	8	0	0	141	0%
Other Red	9	0	0	0	9	0%
Total red varieties	230	8	0	0	238	0%
White winegrapes						
Chardonnay	65	0	0	0	65	0%
Colombard	14	0	0	0	14	0%
Muscat Gordo Blanco	3	0	0	0	3	0%
Pinot Gris	4	0	0	0	4	0%
Riesling	10	0	0	0	10	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other White	3	0	0	0	3	0%
Total white varieties	112	0	0	0	112	0%
Unknown variety	17	0	0	0	17	0%
Total all varieties	359	8	0	0	367	0%

Source:
Vinehealth
Australia

Mount Lofty Ranges zone - other

Winegrape intake summary table

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Cabernet Sauvignon	78				3	4%	81	\$61,459
Malbec					1	100%	1	\$1,993
Mataro/Mourvedre	14						14	\$38,304
Nebbiolo	9						9	\$11,900
Sangiovese	71	\$105,842	\$1,481	13%			71	\$105,842
Shiraz	390				45	10%	435	\$653,312
Red Total	562	\$800,354	\$1,425	1%	50	8%	611	\$872,810
White								
Chardonnay					0	100%	0	\$526
Viognier					0	100%	0	\$701
White Total					1	100%	1	\$1,227
Grand Total	562	\$800,354	\$1,425	1%	51	8%	612	\$874,037

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

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

Mount Lofty Ranges zone - other

Current plantings by variety and year planted

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

Source:
Vinehealth
Australia

Southern Flinders Ranges

Winegrape intake summary table

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush (tonnes)	Total crushed (tonnes)	Estimated total value all grapes
Red								
Cabernet Sauvignon	62				1	2%	63	\$42,758
Merlot	42				1	2%	43	\$23,474
Nebbiolo					1	100%	1	\$2,851
Shiraz	435	\$386,480	\$888	-13%	1	0%	436	\$387,368
Red Total	539	\$451,484	\$838	-15%	4	1%	543	\$456,451
White								
Riesling					1	100%	1	\$1,499
Semillon					1	100%	1	\$1,197
White Total					2	100%	2	\$2,696
Grand Total	539	\$451,484	\$838	-15%	6	1%	545	\$459,148

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

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

Southern Flinders Ranges

Current plantings by variety and year planted

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

Source:
Vinehealth
Australia

The Peninsulas

Winegrape intake summary table

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Cabernet Sauvignon	36				8	19%	45	\$68,135
Merlot					2	100%	2	\$1,686
Shiraz	91				11	10%	101	\$159,573
Red Total	127				21	14%	148	\$229,395
White								
Chardonnay					4	100%	4	\$5,208
Fiano					0	100%	0	\$704
Riesling					3	100%	3	\$4,647
Sauvignon Blanc					10	100%	10	\$14,803
Semillon					3	100%	3	\$3,952
Viognier					3	100%	3	\$4,681
White Total					24	100%	24	\$33,994
Grand Total	127				44	26%	171	\$263,388

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

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

The Peninsulas

Current plantings by variety and year planted

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

Source:
Vinehealth
Australia

Explanations and definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

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

Total crush

The total crushed is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 91 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – not including specific amounts paid for freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2023).

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

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

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

Important note on average purchase value

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

Price dispersion data

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

Estimated total value of all grapes

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

Explanations and definitions - continued

PLANTING DATA

Source of planting data tables

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

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

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

Explanatory notes for planting data tables

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

- Where there are fewer than 10 registered owners with plantings of a particular variety across the state, that variety is not separately identified in either the state or the regional reports but is grouped with “other red/white”, AND
- Where there are fewer than three registered owners with a particular grape variety in a given region, that variety is not separately identified in the regional report but is grouped with “other red/white” unless it is a white variety listed in the top seven, or red variety in the top five by planted area for the state for the current year.
- Planting data tables are current as at 30 April 2023 and include all plantings from the 2022–23 planting season.

- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.
- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or top-worked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.



Acknowledgements

AUSTRALIAN NATIONAL VINTAGE SURVEY

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

Wine Australia Market Insights

+61 8 8228 2000

Market.Insights@wineaustralia.com

About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), growing domestic and international markets, protecting the reputation of Australian wine.

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

Credits

Images – Wine Australia

GI maps – Vinehealth Australia

