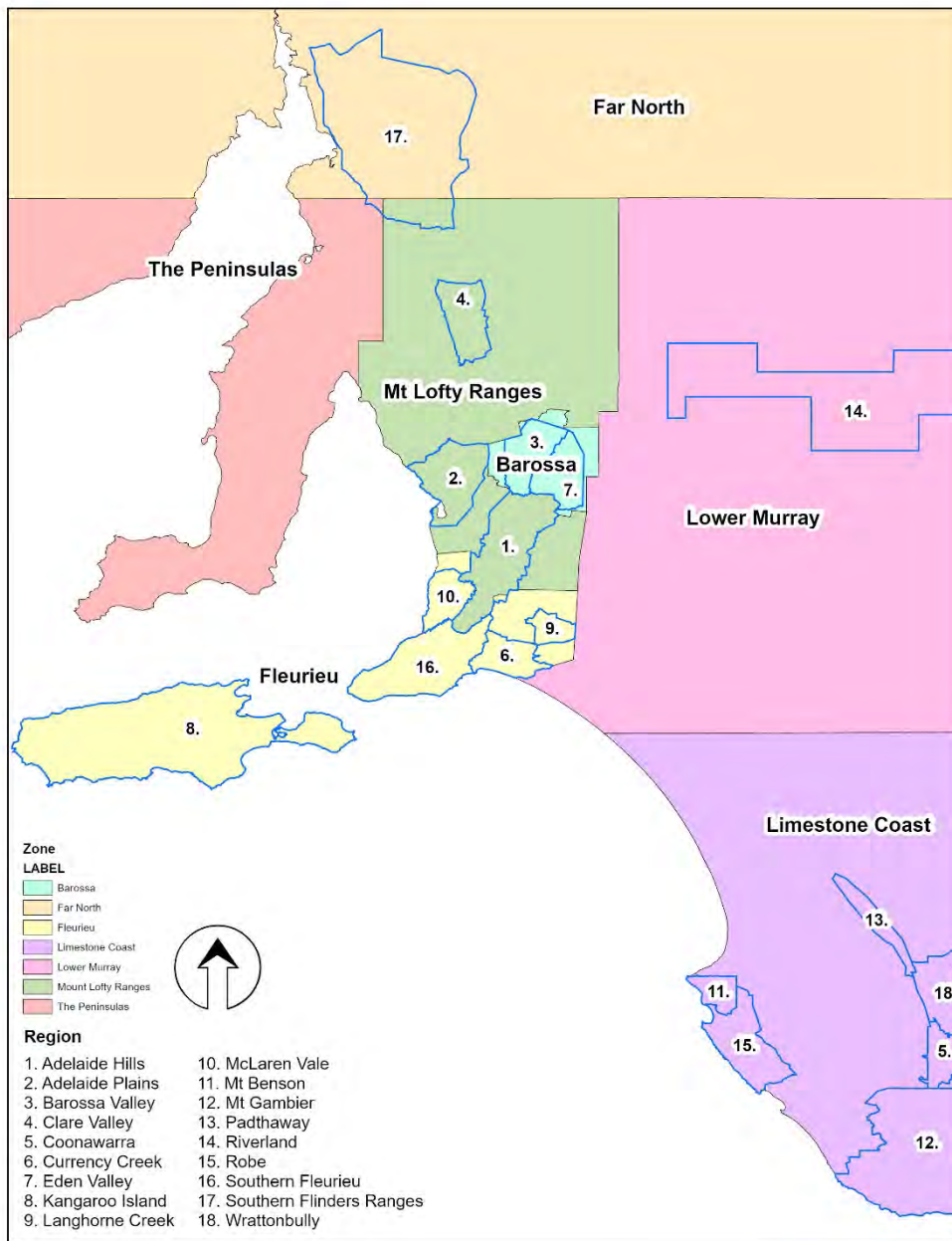


SA Winegrape Crush Survey 2024

South Australia State Summary Report

Wine Australia July 2024



Geographical Indication Zones and Regions in South Australia



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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

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

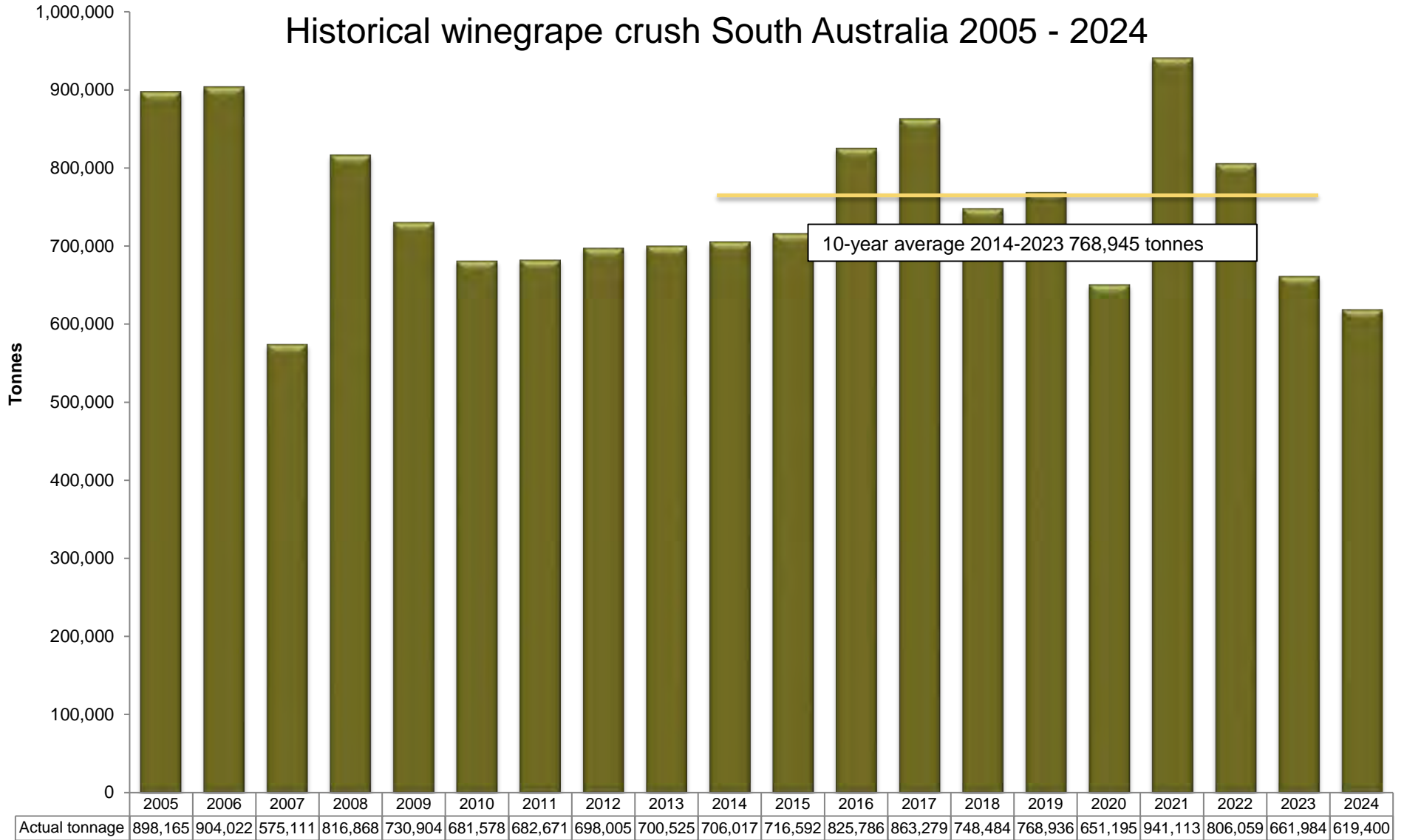
Planting data derived from the Vinehealth Australia vineyard register shows that there were 74,732 hectares planted to vines in South Australia as at 30 April 2024. This represents a net decrease of 753 hectares in the last 12 months.

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).

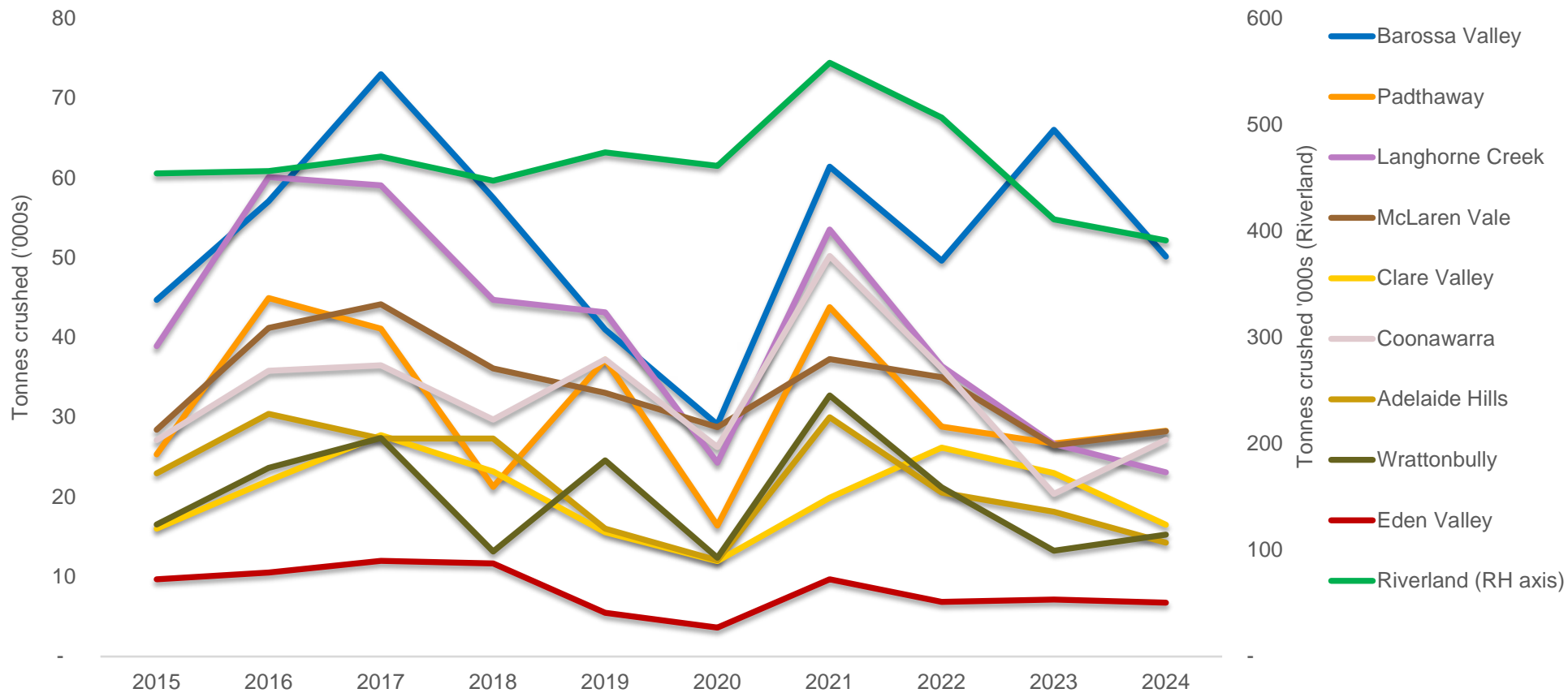
There were 3,182 vineyard owners registered with Vinehealth Australia as at 30 April 2024, compared with 3,234 in 2023.

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

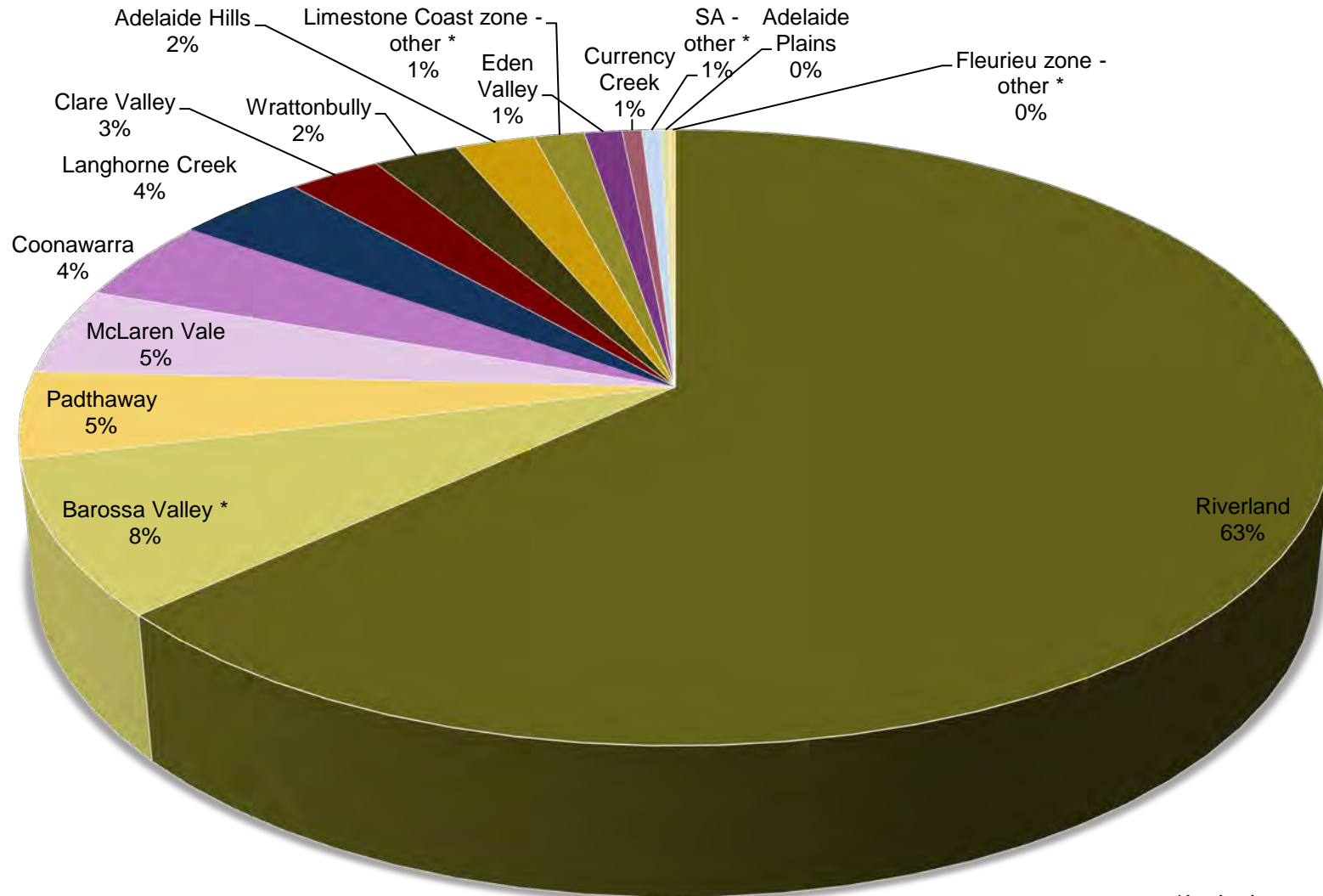
State summary 2024

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

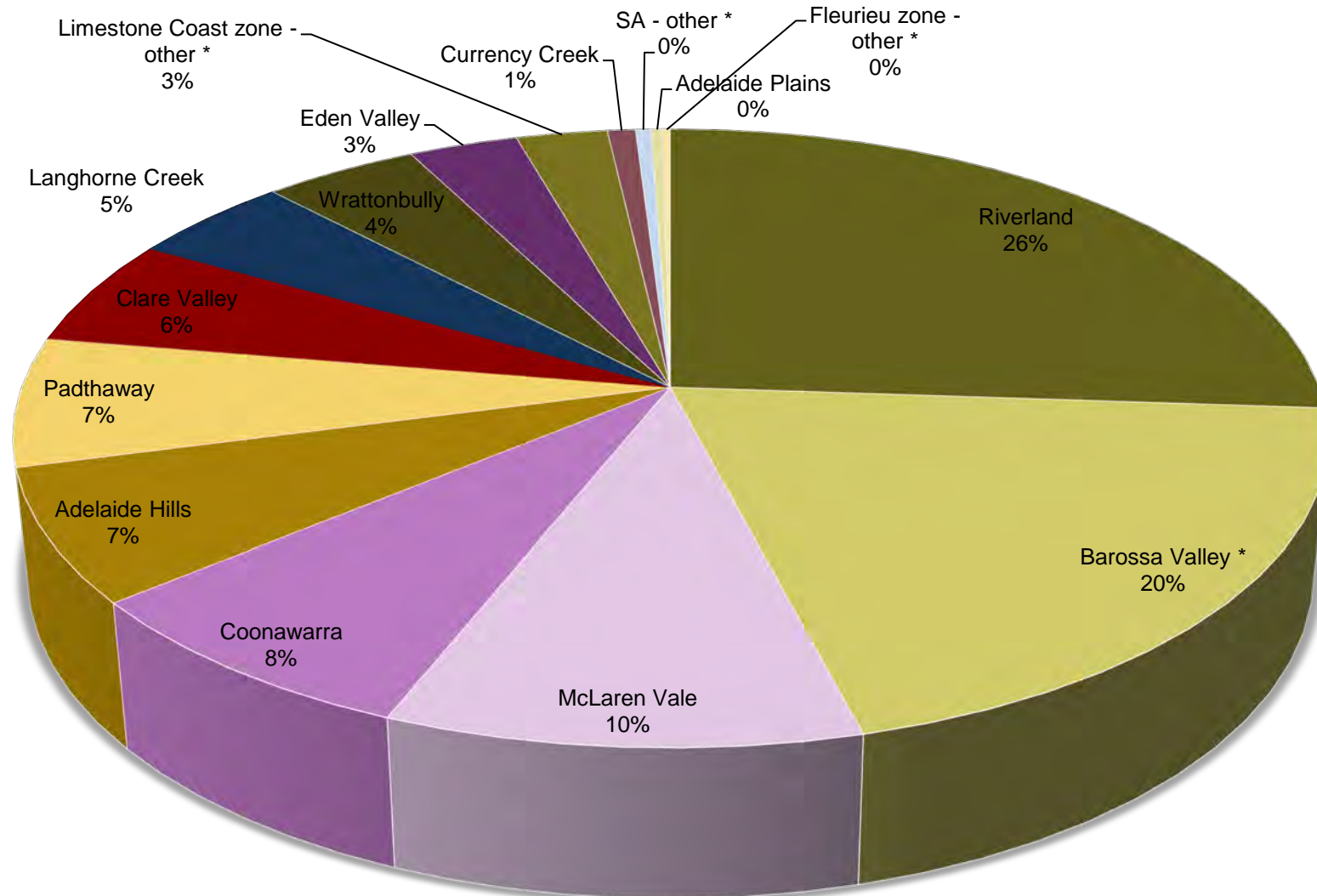
Share of crush volume by region 2024



*Inclusions as on page 6-7

State summary 2024

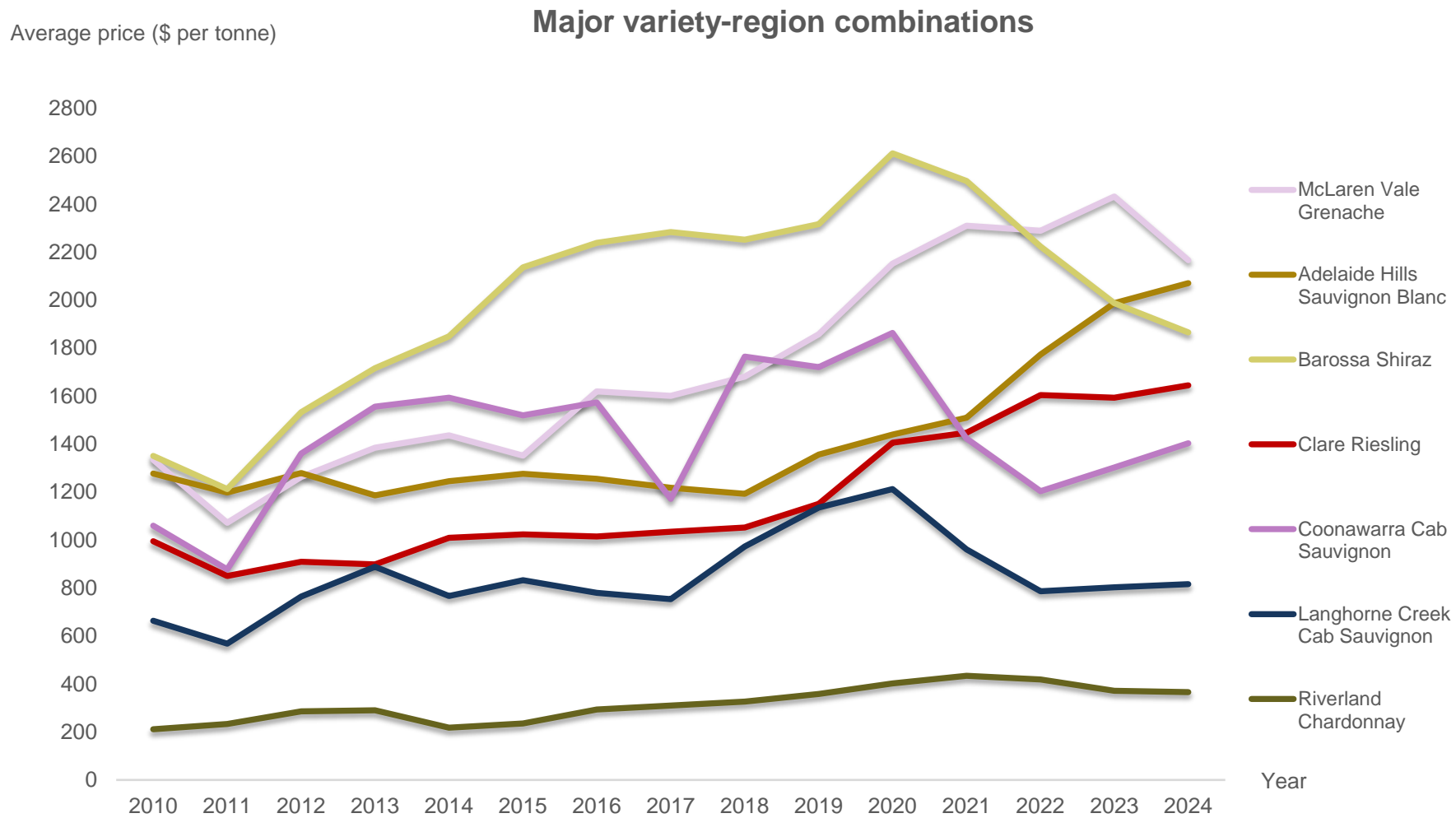
Share of crush value by region 2024



*Inclusions as on page 6-7

State summary 2024

Historical weighted average prices 2010 – 2024

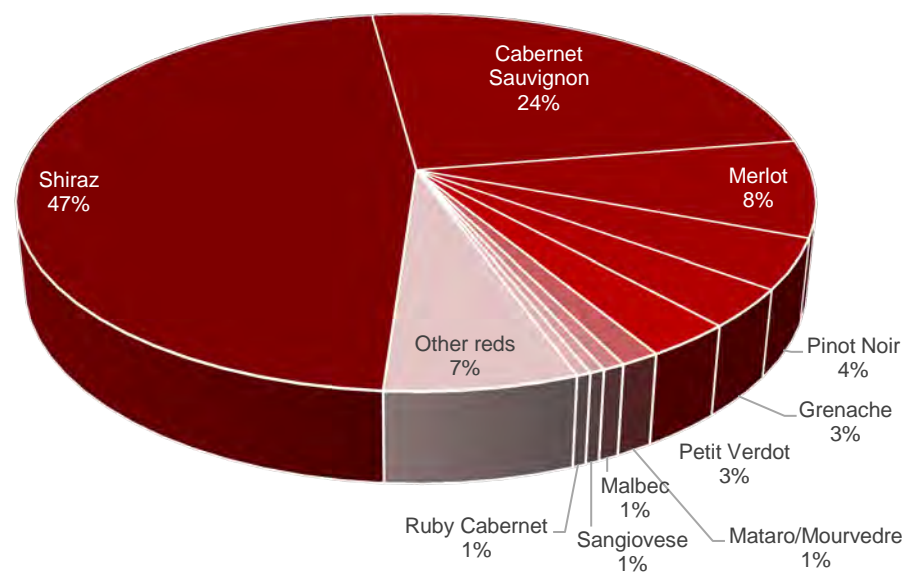


State summary 2024

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

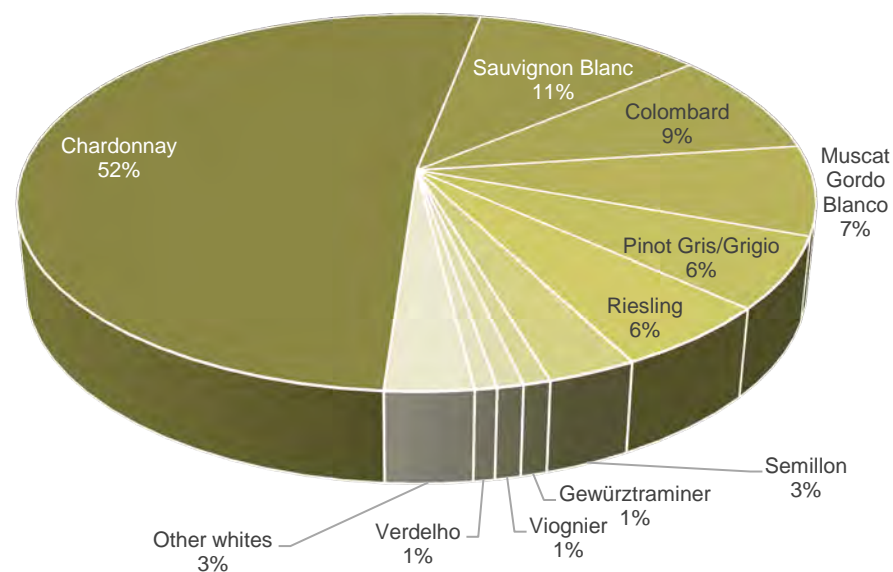


State summary 2024

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%

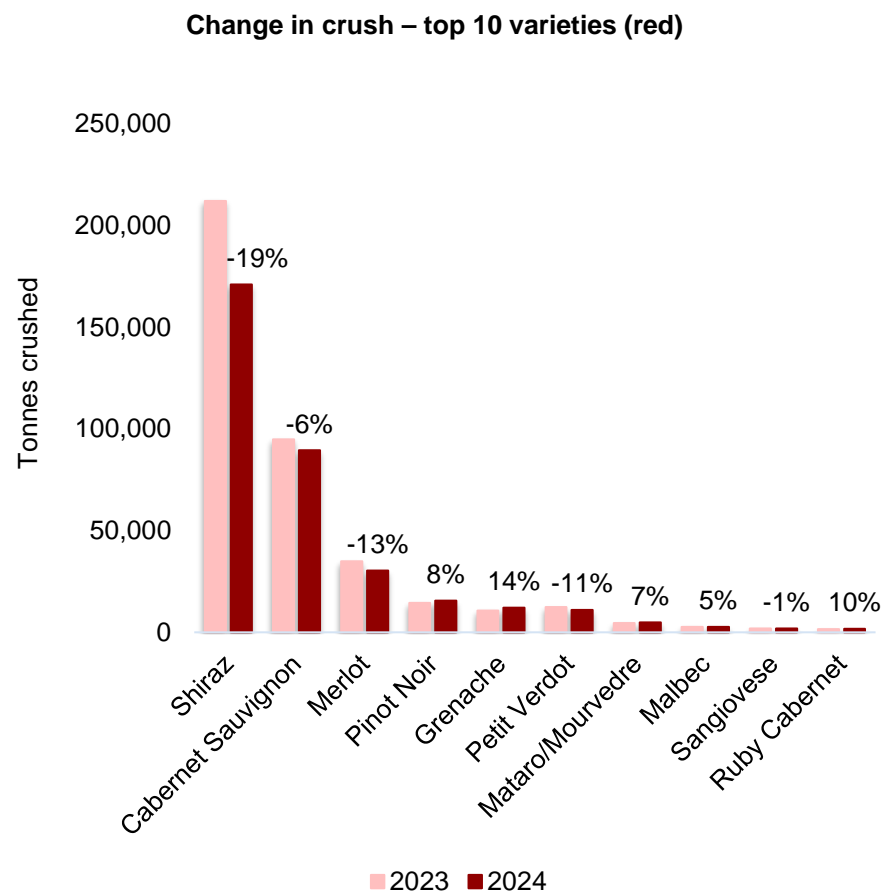
Share of white crush by variety



State summary 2024

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

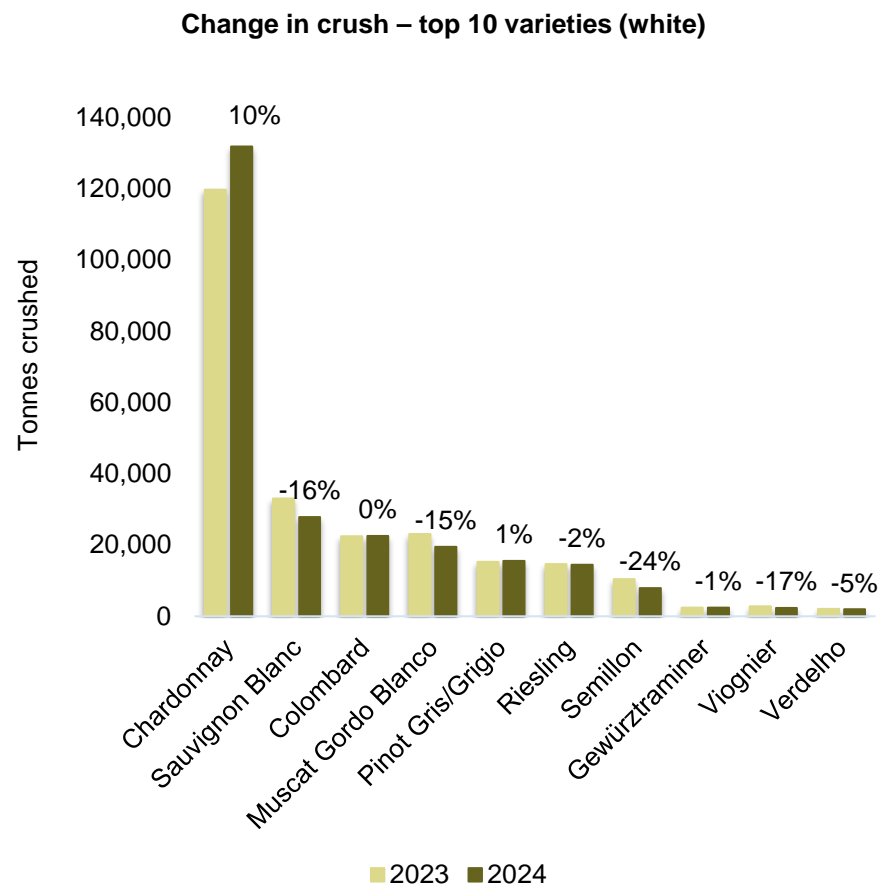
	2023	2024	% change
Red			
Shiraz	212,049	171,054	-19%
Cabernet Sauvignon	94,913	89,527	-6%
Merlot	34,931	30,363	-13%
Pinot Noir	14,493	15,612	8%
Grenache	10,643	12,160	14%
Petit Verdot	12,432	11,047	-11%
Mataro/Mourvedre	4,662	4,976	7%
Malbec	2,648	2,770	5%
Sangiovese	1,921	1,902	-1%
Ruby Cabernet	1,650	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

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

