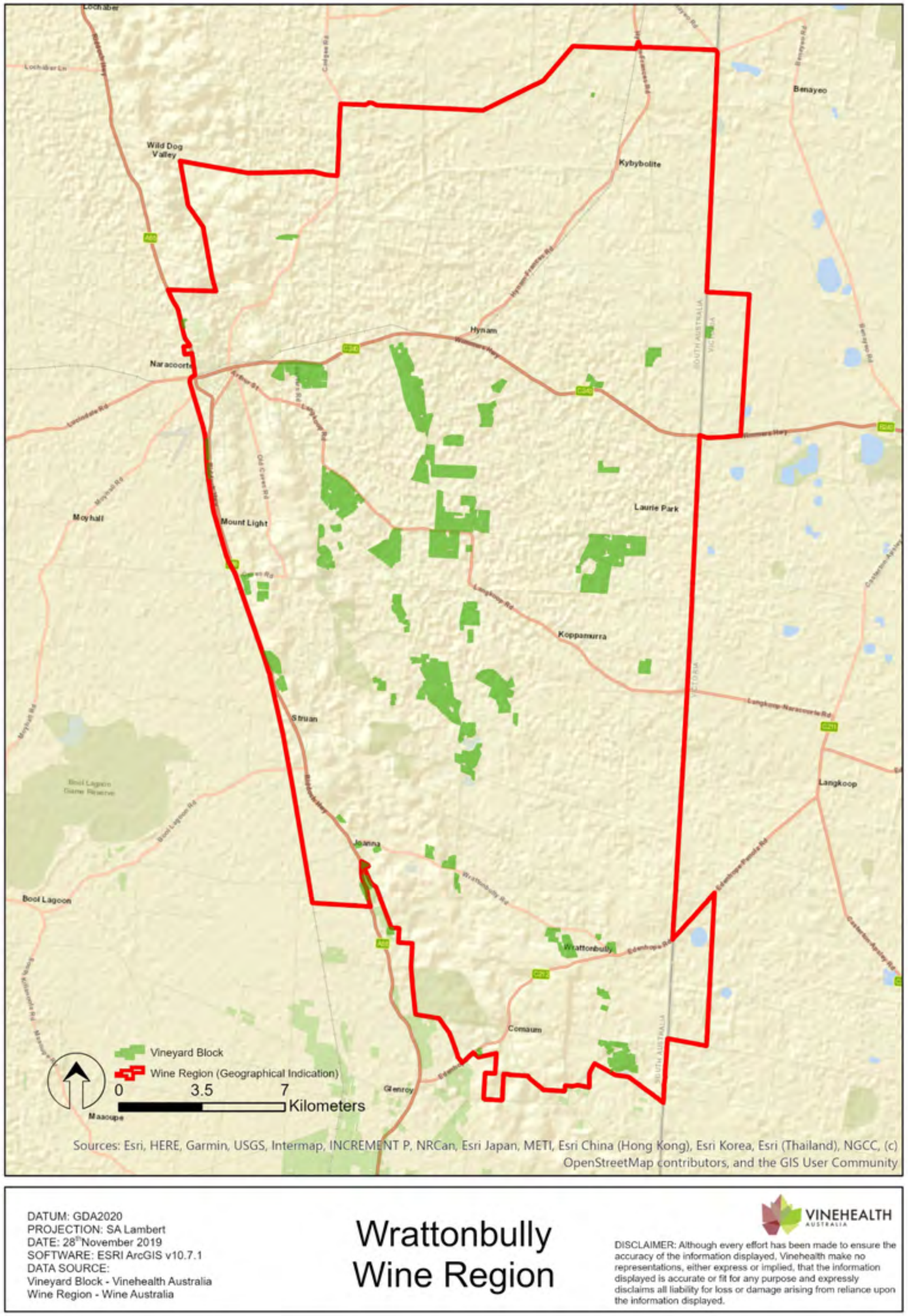


SA Winegrape Crush Survey 2022

Regional Summary Report

Wrattonbully Wine Region

Wine Australia July 2022

Wrattonbully

Vintage overview

VINTAGE REPORT

Coming out of winter, the 2021–22 season was looking fantastic with reasonable winter rainfall and near full soil moisture profiles. Moderate rainfall continued throughout early spring. The mild and dry conditions throughout late spring put the vine growth stages slightly behind average, with the majority of the flowering occurring from late November to early December.

The mild and dry conditions carried on throughout summer, allowing the vines to develop in near perfect conditions. There was a distinct lack of weather extremes with no wet cold spells or heat waves for the vines to contend with. The mild and dry conditions continued on into February, March and April which allowed for a slow and very even ripening of the fruit, with flavours, tannins and Baumés developing well across all varieties.

Harvesting of early white varieties commenced in late February, but with the cool and mild conditions, most of the harvesting of whites occurred in mid to late March which is slightly later than the long-term average. Excellent canopy conditions combined with favourable weather at harvest meant that the whites are showing strong varietal characters and high crisp natural acidity.

The cooler ripening conditions pushed the harvest of red varieties out and the early varieties commenced late in March. The bulk of red harvest didn't start until April, with most of the harvesting occurring in mid to late April in ideal weather conditions. The dry and mild conditions allowed for the red varieties to be harvested at optimal ripeness with fully ripe tannins and flavours, with more moderate Baumés than the past few seasons. It is one of those years that it is hard to pick out a standout variety as all varieties both reds and whites performed exceptionally well.

Tim Fletcher, Chairperson
Wrattonbully Wine Region Association.

OVERVIEW OF VINTAGE STATISTICS

After recording a record crush in 2021 of 32,763 tonnes, the 2022 crush was 35 per cent lower at 21,211 tonnes. Over the past five years (up to 2021), the average crush for Wrattonbully has been 22,054 tonnes, making this year's crush just 4 per cent below the five-year average.

There were 21 respondents to the survey who reported crushing grapes from Wrattonbully in 2022, compared with 23 in 2021.

The total estimated value of winegrapes from Wrattonbully in 2022 was just under $27 million, compared with $35 million in 2021. The decrease in production was partly offset by an overall increase in the average purchase value of grapes, which increased by 19 per cent from $1052 per tonne in 2021 to $1248 per tonne.

All varieties increased in average value. Cabernet Sauvignon was up 12 per cent to $1266 per tonne, Shiraz up 28 per cent to $1402 per tonne, Chardonnay up 16 per cent to $940 per tonne and Pinot Gris/Grigio up 17 per cent to $1359 per tonne.

It should be noted that these are weighbridge prices and do not include end-use bonuses. It has previously been found that Padthaway and Wrattonbully have larger adjustments made to their prices post-weighbridge than any other GI regions in South Australia, adding up to 30 per cent to the final value.

According to Vinehealth Australia data, the total vineyard area in Wrattonbully as at 30 April 2022 is 2750 hectares, 37 hectares more than in 2021 and around 100 hectares more than it was five years ago.

There were 12 hectares of new plantings in the 2021–22 planting season, 8 of which were Pinot Gris/Grigio and 4 per Shiraz.

Wrattonbully

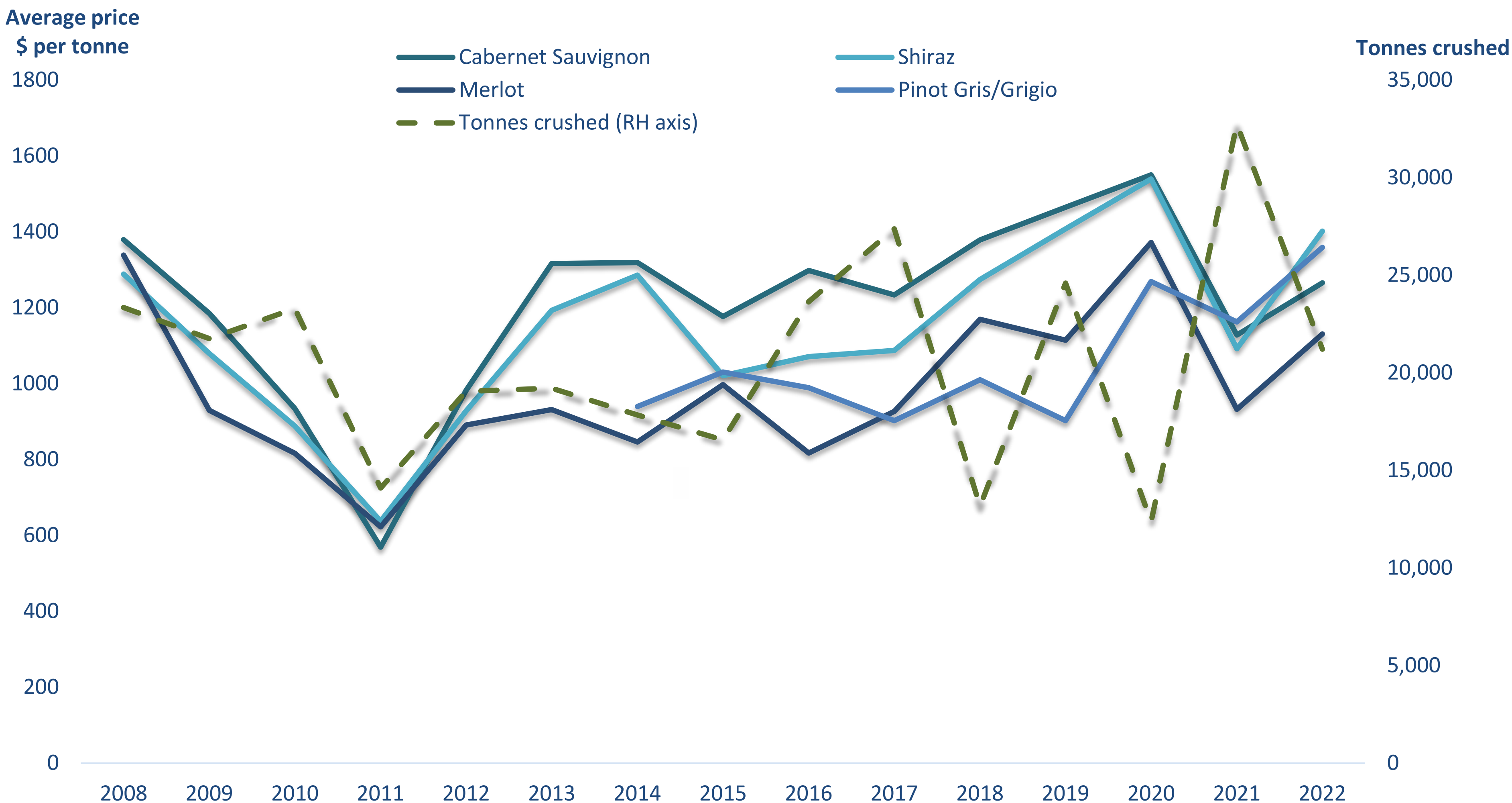
Winegrape intake summary table

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Barbera	5				5	51%	10	$19,620
Cabernet Franc					5	100%	5	$7,647
Cabernet Sauvignon	2,931	$3,710,441	$1,266	12%	5,900	67%	8,831	$11,181,011
Grenache					77	100%	77	$168,538
Malbec	75	$87,986	$1,167	4%	90	55%	166	$193,565
Merlot	647	$731,698	$1,131	21%	1,456	69%	2,103	$2,378,387
Petit Verdot	4				54	92%	59	$81,984
Pinot Noir	149	$230,490	$1,545	36%	240	62%	389	$601,774
Sangiovese					47	100%	47	$71,119
Shiraz	1,737	$2,424,871	$1,402	28%	3,256	65%	4,993	$6,989,957
Tempranillo	25				12	33%	37	$66,645
Other red					8	100%	8	$20,225
Red Total	**5,573**	**$7,246,125**	**$1,302**	**19%**	**11,151**	**67%**	**16,724**	**$21,780,472**
White								
Chardonnay	891	$837,518	$940	16%	1,246	58%	2,138	$2,008,520
Fiano	5				6	55%	11	$21,460
Pinot Gris/Grigio	358	$486,859	$1,359	17%	1,108	76%	1,466	$1,993,143
Prosecco	52						52	$51,700
Riesling	23				49	68%	72	$64,413
Sauvignon Blanc	177	$171,190	$966	22%	450	72%	628	$606,141
Semillon					58	100%	58	$63,414
Viognier					64	100%	64	$90,772
White Total	**1,506**	**$1,577,499**	**$1,047**	**22%**	**2,981**	**66%**	**4,487**	**$4,899,563**
Grand Total	**7,079**	**$8,823,624**	**$1,248**	**19%**	**14,131**	**67%**	**21,211**	**$26,680,035**

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

Wrattonbully

Historical weighted average price vs tonnes crushed



Wrattonbully

Price dispersion – purchased grapes

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Barbera					5	5
Cabernet Sauvignon	639	224	816	1,052	200	2,931
Malbec			66		10	75
Merlot	37	132	478			647
Petit Verdot			4			4
Pinot Noir			34	115		149
Shiraz		188	904	541	104	1,737
Tempranillo				25		25
Red Total	**676**	**543**	**2,302**	**1,733**	**319**	**5,573**
White						
Chardonnay	10	208	673			891
Fiano					5	5
Pinot Gris/Grigio			194	164		358
Prosecco			52			52
Riesling			23			23
Sauvignon Blanc		27	150			177
White Total	**10**	**235**	**1,092**	**164**	**5**	**1,506**
Total purchased	**686**	**778**	**3,394**	**1,897**	**324**	**7,079**

Wrattonbully

Current plantings by variety and year planted

Area (hectares)						
Variety	**Pre-2019**	**2019**	**2020**	**2021**	**Total area (Ha)**	**% planted in 2021**
Red winegrapes						
Cabernet Sauvignon	1,230	71	0	0	1,301	*0%*
Grenache	0	3	0	0	3	*0%*
Malbec	6	5	0	0	11	*0%*
Merlot	223	0	0	0	223	*0%*
Pinot Noir	63	0	0	0	63	*0%*
Shiraz	730	36	6	4	776	*1%*
Tempranillo	9	0	0	0	9	*0%*
Other Red	11	0	0	0	11	*0%*
Total red varieties	**2,272**	**115**	**6**	**4**	**2,397**	***0%***
White winegrapes						
Chardonnay	156	0	0	0	156	*0%*
Pinot Gris	99	0	0	8	107	*7%*
Riesling	7	0	0	0	7	*0%*
Sauvignon Blanc	59	0	0	0	59	*0%*
Semillon	3	0	0	0	3	*0%*
Other White	14	0	0	0	14	*0%*
Total white varieties	**338**	**0**	**0**	**8**	**346**	***2%***
Unknown variety	7	0	0	0	7	*0%*
Total all varieties	**2,617**	**115**	**6**	**12**	**2,750**	***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 89 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

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

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receival – not including specific amounts paid for freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2022).

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 (shaded columns in Intake Summary tables)

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 2022 and include all plantings from the 2021–22 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 National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association, Wine Grape Growers South Australia and Primary Industries and Regions SA.

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

Survey results from 2015 onwards are available on the Wine Australia interactive Vintage Survey Dashboard:
https://marketexplorer.wineaustralia.com/vintage-survey

About Wine Australia

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

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

Credits

Images – Wine Australia
GI maps – Vinehealth Australia

Disclaimer

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

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

Any questions about the report should be directed to:

Wine Australia Market Insights
+61 8 8228 2000
Market.Insights@wineaustralia.com