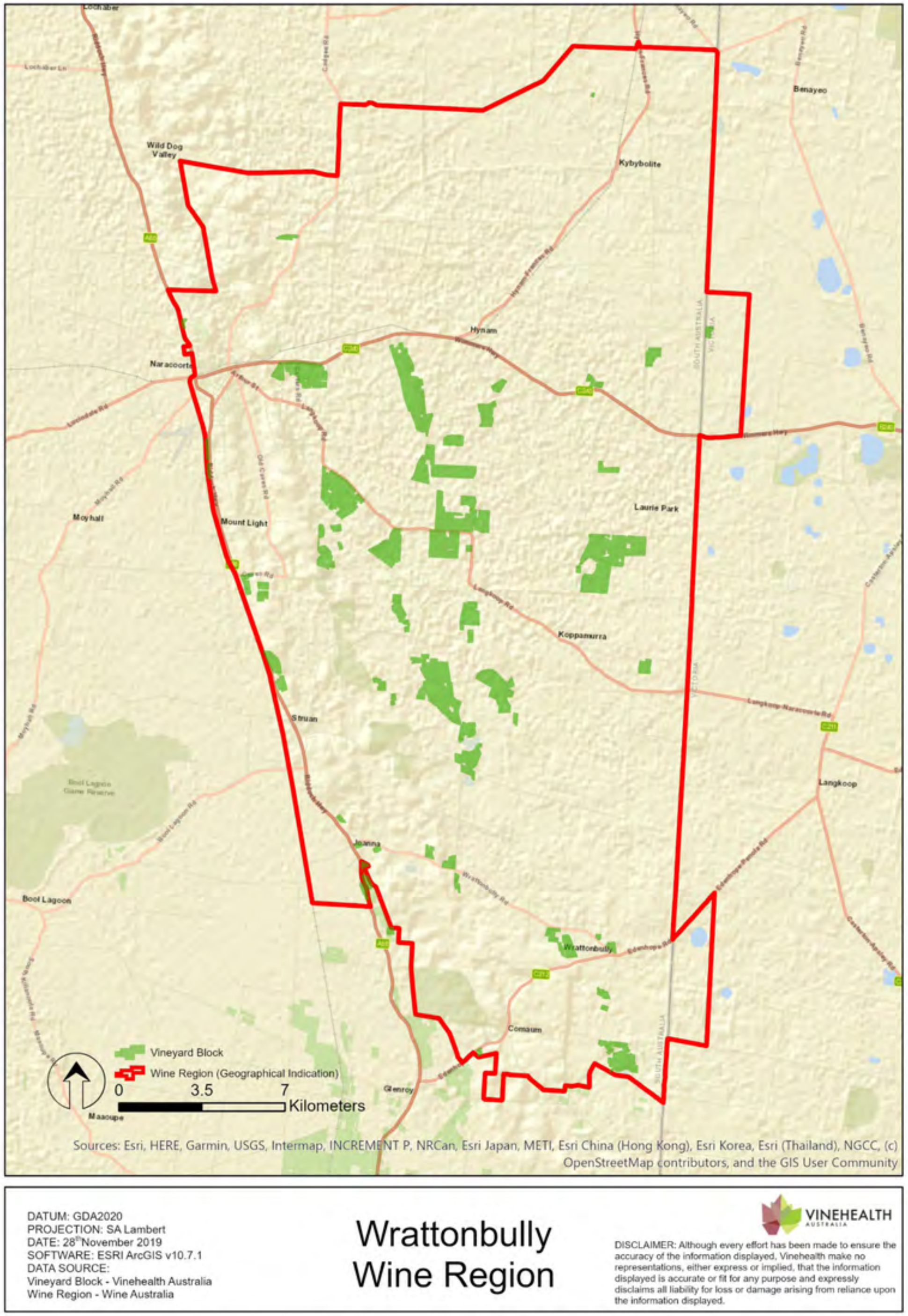


SA Winegrape Crush Survey 2023

Regional Summary Report

Wrattonbully Wine Region

Wine Australia July 2023

Wrattonbully

Vintage overview

VINTAGE REPORT

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

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

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

Tim Fletcher, Chairperson – Wrattonbully Wine Region Association.

OVERVIEW OF VINTAGE STATISTICS

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

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

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

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

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

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

Wrattonbully

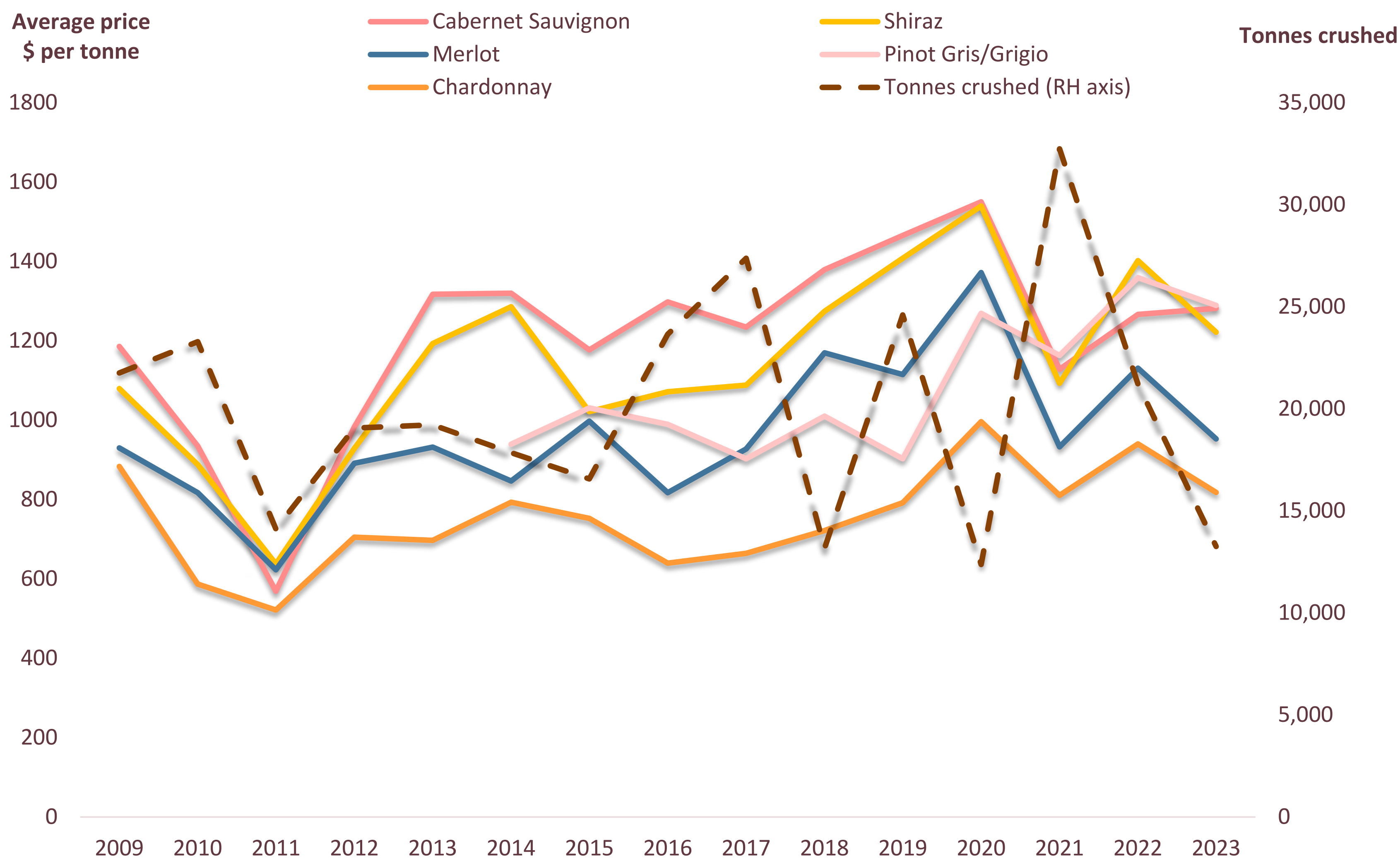
Winegrape intake summary table

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

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

Wrattonbully

Historical weighted average price vs tonnes crushed



Wrattonbully

Price dispersion – purchased grapes

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

Wrattonbully

Current plantings by variety and year planted

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

Source: Vinehealth Australia

Explanations and definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

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

Total crush

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

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

Calculated average purchase value

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

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

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

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

Important note on average purchase value

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

Price dispersion data

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

Estimated total value of all grapes

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

Explanations and definitions - continued

PLANTING DATA

Source of planting data tables

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

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

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

Explanatory notes for planting data tables

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

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

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

Acknowledgements

AUSTRALIAN NATIONAL VINTAGE SURVEY

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