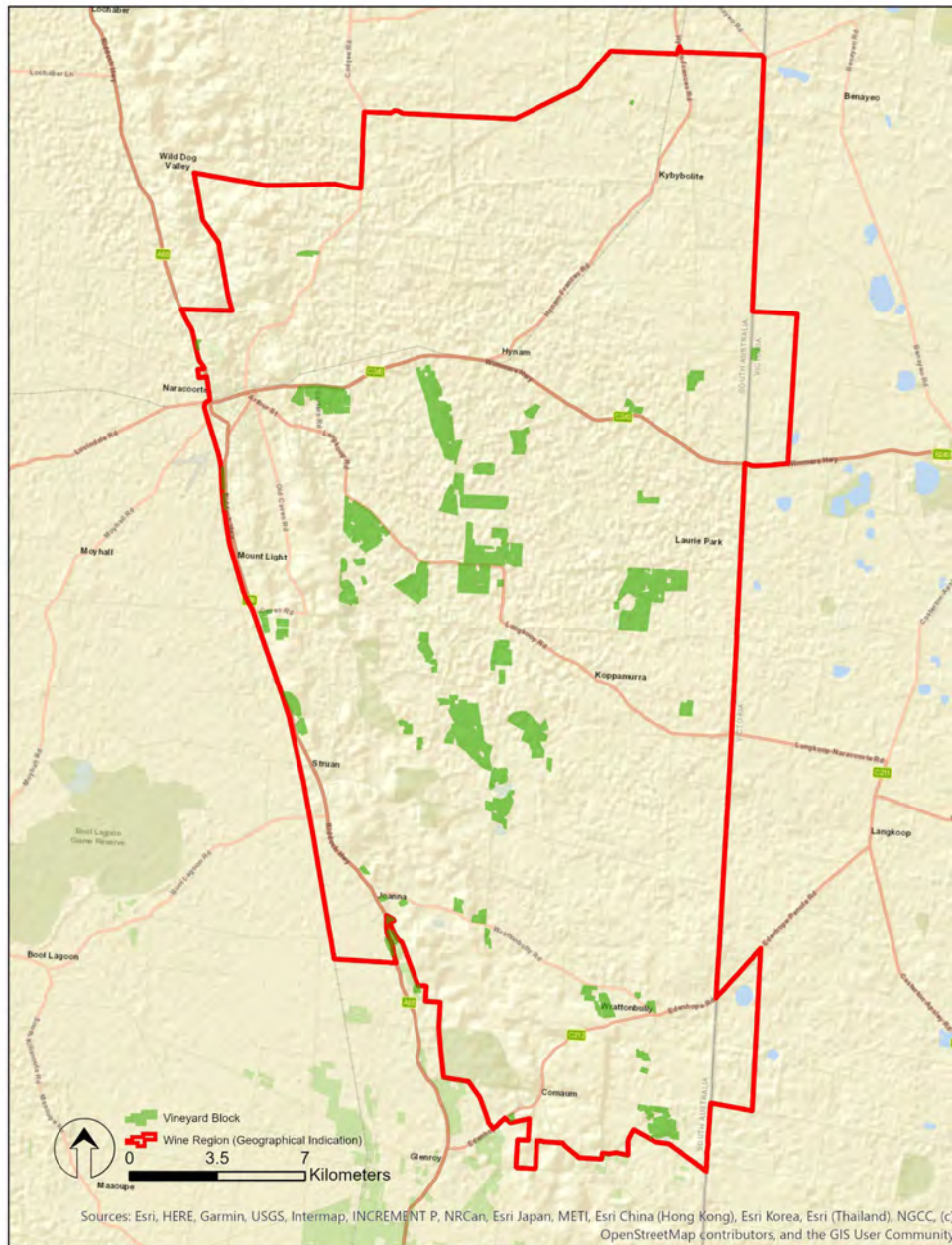


SA Winegrape Crush Survey 2024

Regional Summary Report

Wrattonbully 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

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

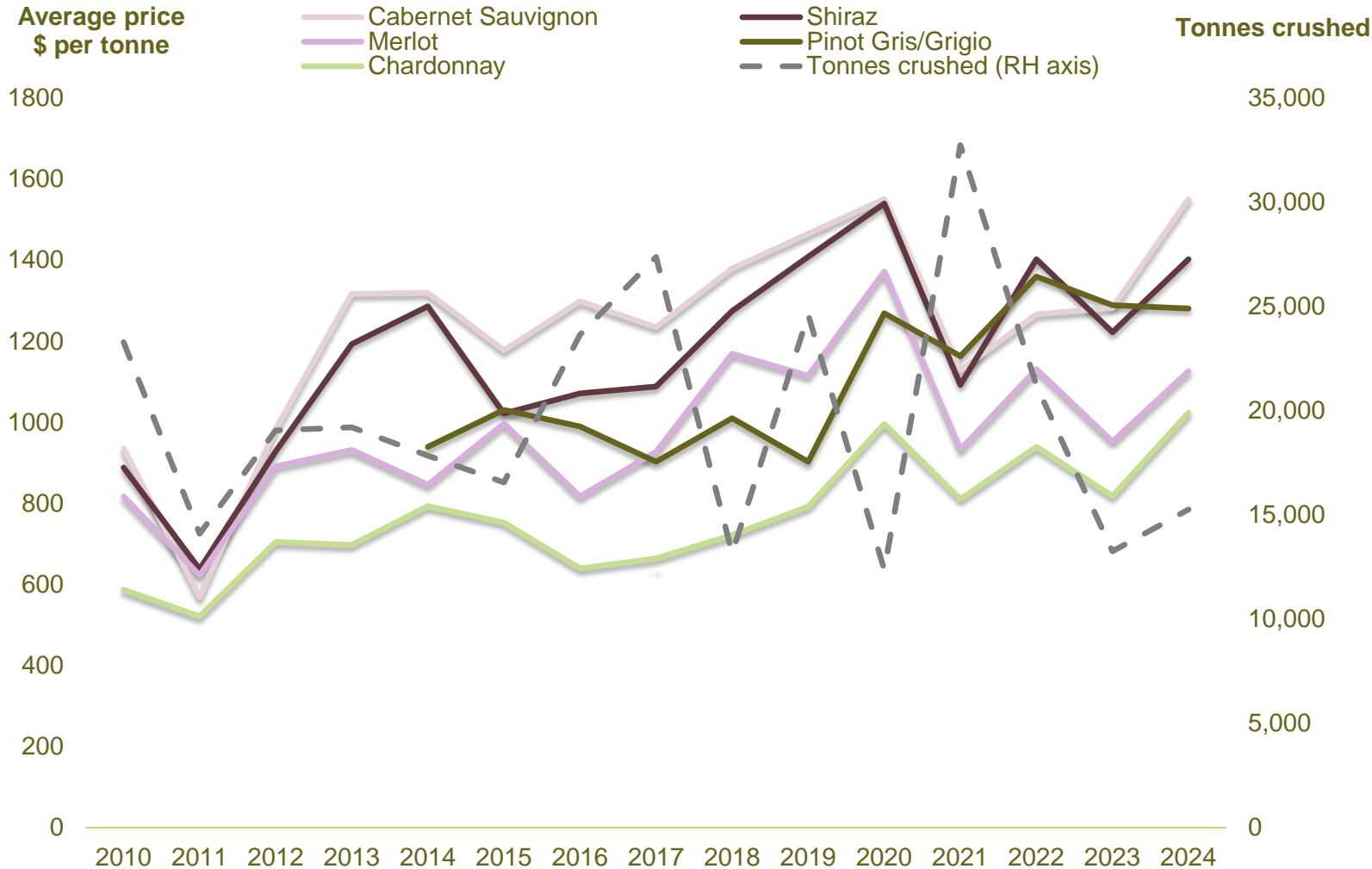
Winegrape intake summary table

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.

Wrattobully

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

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

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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

