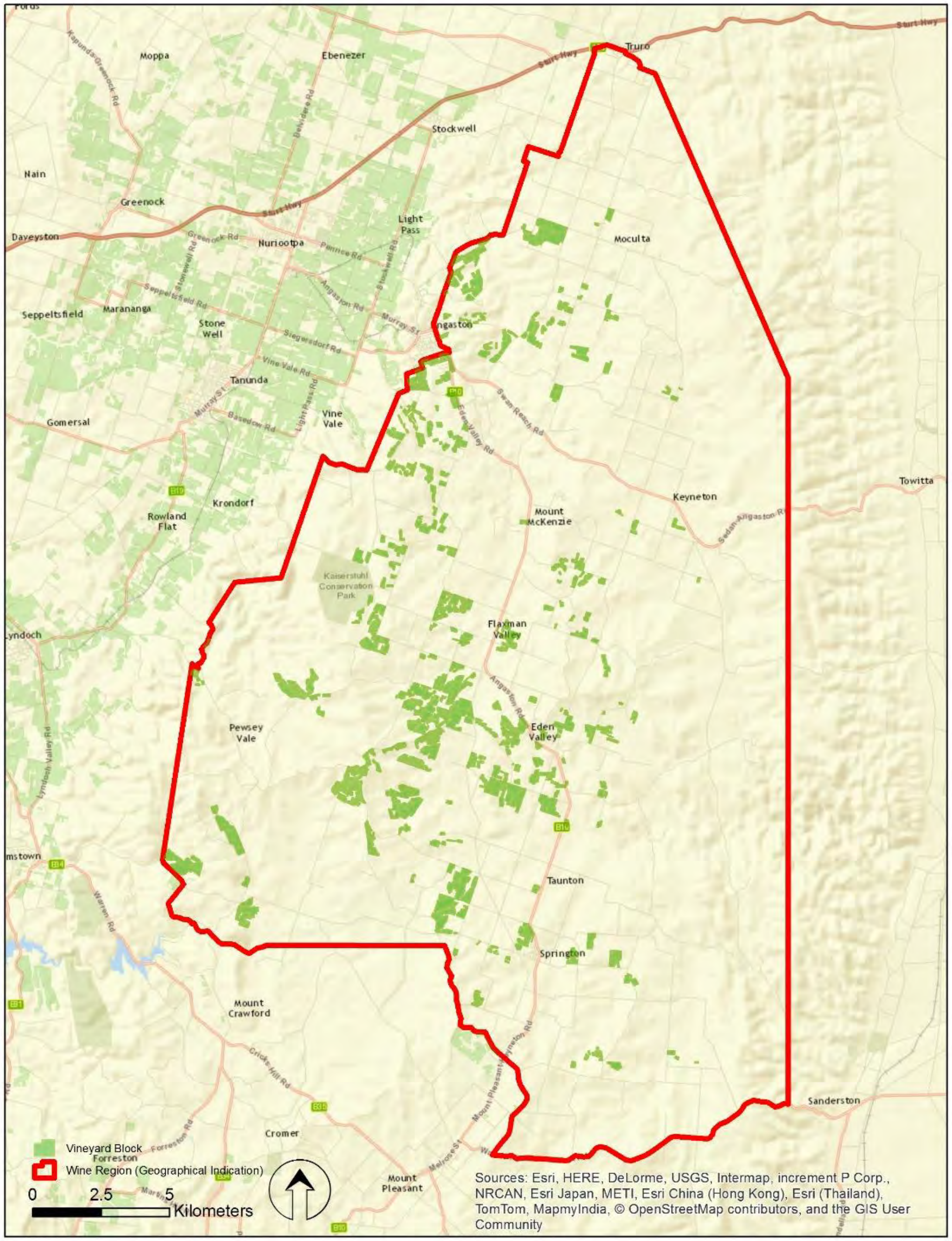


DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Eden Valley
Wine Region

Vinehealth Australia

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# SA Winegrape Crush Survey

# Regional Summary Report 2018

# Eden Valley Wine Region

*Wine Australia August 2018*

# Eden Valley

## Vintage overview

### VINTAGE REPORT

The 2018 vintage in Eden Valley will be one to savour.

"Flavours and colours in reds are wonderful, and natural acids in the Eden Valley whites surprisingly high, with early standout varieties this year including Riesling, Chardonnay, Shiraz, Grenache and Cabernet", said Yalumba head of winemaking Louisa Rose.

The growing season started off well, with Winter 2017 rainfall around 10% higher than average. Spring rainfall was only slightly below average (98%) in Eden Valley, with December rainfall 88%. Eden Valley fared better than Barossa Valley, where December rainfall was only 57% of average.

Drier soils, combined with warmer than average October and November days meant the vine canopies grew quickly; flowering well and setting a good number of bunches.

January and February were warm and dry, with very warm temperatures in February slowing down the pace of ripening.

Eden Valley Shiraz and Cabernet Sauvignon continued to be harvested throughout April. The 28-30mm of rain on 14/15 April did not cause any major problems for picking – and will be a welcome post-harvest watering for most Barossa growers.

*Nicki Robins, Barossa Grape & Wine Association*

### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Eden Valley in 2018 was 11,593 tonnes, 3% lower than the 2017 harvest of 11,975 tonnes.

The five-year average crush for Eden Valley from 2013-2017 is 9,577 tonnes, making the 2018 harvest 21% above the average and the second highest since 2011.

The estimated value of fruit from the region in 2018 was just under $22 million, very similar to last year, reflecting the combination of a slightly lower tonnage and a small increase in the region's overall average grape value. There were increases for all the top four varieties: Shiraz up 11% to $2636 per tonne, Cabernet Sauvignon up 15% to $2354 per tonne, Riesling up 2% to $1605 per tonne and Chardonnay up 3% to $1243 per tonne.

The price dispersion data shows that nearly 60% of red tonnages were purchased at $2000+ per tonne, and in the whites, 29% were purchased between $1500 and $2000 and 7% at above $2000. This distribution is very similar to last year's.

There were just 5 hectares of new plantings in Eden Valley in the 2017 planting season, compared with 42 in 2016. The total planted area as at 30 April 2018 was 2,335 hectares, very slightly lower than the 2,346 hectares in 2017, and 3% higher than it was in 2013 (2,261 hectares).

# Eden Valley

## Winegrape intake summary table

| | Total tonnes purchased | Price dispersion - number of tonnes in each price range < $300 | $300 to <$600 | $600 to <$1500 | $1500 to <$2000 | $2000+ | total value purchased grapes | Average purch. value per tonne | Change in price YoY | Winery grown fruit | Share of winery grown | Total crushed | Est total value ALL grapes |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Red** | | | | | | | | | | | | | |
| Cabernet Franc | 17 | | | | | 17 | | | | 11 | 39% | 28 | $62,942 |
| Cabernet Sauvignon | 566 | | | | 176 | 390 | $1,332,451 | $2,354 | 15% | 813 | 59% | 1,379 | $3,246,117 |
| Grenache | 27 | | | | 7 | 20 | $73,257 | $2,734 | 30% | 9 | 25% | 36 | $98,055 |
| Mataro/Mourvedre | 7 | | | | 4 | 3 | | | | 34 | 83% | 41 | $97,976 |
| Merlot | 205 | | | 123 | 82 | | $259,248 | $1,264 | -6% | 82 | 28% | 287 | $362,376 |
| Montepulciano | | | | | | | | | | 11 | 100% | 11 | $20,615 |
| Nero d'Avola | 2 | | | | 2 | | | | | | 0% | 2 | $4,072 |
| Petit Verdot | 14 | | | | | 14 | | | | 40 | 74% | 54 | $107,160 |
| Pinot Noir | 190 | | | 180 | 10 | | $223,940 | $1,181 | -3% | 78 | 29% | 268 | $316,378 |
| Shiraz | 1,858 | | | | 544 | 1,313 | $4,898,848 | $2,636 | 11% | 1,536 | 45% | 3,394 | $8,947,777 |
| Tempranillo | 49 | | | 7 | 42 | | $77,350 | $1,587 | | 22 | 31% | 71 | $112,668 |
| Other red | 5 | | | 5 | | | | | | 7 | 56% | 12 | $12,674 |
| **Red total** | **2,939** | | | **315** | **867** | **1,756** | **$6,956,640** | **$2,367** | **9%** | **2,642** | **47%** | **5,582** | **$13,388,809** |
| **White** | | | | | | | | | | | | | |
| Chardonnay | 613 | | | 453 | 160 | | $762,606 | $1,243 | 3% | 817 | 57% | 1,431 | $1,778,550 |
| Gewurztraminer | 47 | | | 47 | | | | | | 30 | 40% | 77 | $89,192 |
| Muscat Blanc a Petits Grains | 29 | | | 24 | 5 | | $26,614 | $912 | -3% | 1 | 3% | 30 | $27,325 |
| Pinot Gris/Grigio | 120 | | | 116 | 4 | | $154,810 | $1,292 | 0% | 141 | 54% | 261 | $336,500 |
| Riesling | 1,212 | | | 580 | 466 | 166 | $1,945,385 | $1,605 | 2% | 1,921 | 61% | 3,134 | $5,028,655 |
| Roussanne | 54 | | | 54 | | | | | | 11 | 17% | 65 | $88,223 |
| Sauvignon Blanc | 125 | | | 125 | | | $113,069 | $904 | -9% | 213 | 63% | 338 | $305,537 |
| Semillon | 163 | | 8 | 154 | | | $118,817 | $731 | -3% | 42 | | 205 | $149,801 |
| Viognier | 182 | | 19 | 40 | 113 | 11 | $287,397 | $1,576 | -6% | 183 | 50% | 365 | $575,761 |
| Other white | 17 | | | 17 | | | | | | 89 | 84% | 106 | $143,586 |
| **White total** | **2,563** | | **27** | **1,611** | **748** | **177** | **$3,559,133** | **$1,389** | **3%** | **3,449** | **57%** | **6,012** | **$8,523,130** |
| **Grand total** | **5,502** | | **27** | **1,926** | **1,615** | **1,934** | **$10,515,773** | **$1,911** | **8%** | **6,091** | **53%** | **11,593** | **$21,911,939** |

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

# Eden Valley

## Current plantings by variety and year planted

| | Year planted | | | | | |
|---|---|---|---|---|---|---|
| Variety | Pre-2015 | 2015 | 2016 | 2017 | Total area | % planted in 2017 |
| **Red winegrapes** | | | | | | |
| Cabernet Franc | 5 | 0 | 0 | 0 | 5 | 0% |
| Cabernet Sauvignon | 324 | 2 | 14 | 0 | 340 | 0% |
| Grenache | 20 | 0 | 0 | 0 | 20 | 0% |
| Mataro (Mourvedre) | 16 | 0 | 0 | 0 | 16 | 0% |
| Merlot | 68 | 0 | 0 | 0 | 68 | 0% |
| Petit Verdot | 7 | 0 | 0 | 0 | 7 | 0% |
| Pinot Noir | 59 | 1 | 0 | 3 | 63 | 4% |
| Shiraz | 742 | 1 | 27 | 3 | 773 | 0% |
| Tempranillo | 9 | 0 | 0 | 0 | 9 | 0% |
| Other red | 13 | 0 | 0 | 0 | 13 | 0% |
| **Total red varieties** | **1,262** | **4** | **42** | **5** | **1,313** | **0%** |
| **White winegrapes** | | | | | | |
| Chardonnay | 257 | 7 | 0 | 0 | 264 | 0% |
| Muscat A Petit Grains Blanc (White Frontignac) | 7 | 0 | 0 | 0 | 7 | 0% |
| Pinot Gris | 36 | 0 | 0 | 0 | 36 | 0% |
| Riesling | 539 | 2 | 0 | 0 | 541 | 0% |
| Sauvignon Blanc | 54 | 0 | 0 | 0 | 54 | 0% |
| Semillon | 24 | 0 | 0 | 0 | 24 | 0% |
| Traminer (Gewurztraminer) | 17 | 0 | 0 | 0 | 17 | 0% |
| Viognier | 42 | 0 | 0 | 0 | 42 | 0% |
| Other white | 21 | 1 | 0 | 0 | 22 | 0% |
| **Total white varieties** | **998** | **10** | **0** | **0** | **1,008** | **0%** |
| Unknown variety | 14 | 0 | 0 | 0 | 14 | 0% |
| **Total all varieties** | **2,274** | **14** | **42** | **5** | **2,335** | **0%** |

*Source: Vinehealth Australia*

# Explanations and definitions

## 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.

Maps and planting data tables are provided by Vinehealth Australia (see notes on planting data tables pg 20).

The survey publication is available on Wine Australia's website wineaustralia.com, 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 winesa.com.au

### Photo credits

Cover image: Andre Castelluci / Wine Australia
Image pg 5: Ian Routledge / Wine 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
+618 8228 2000
market/insights@wineaustralia.com

# Explanations and definitions - continued

**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 85 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 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 2018).

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.

**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 not collected by the 2018 Australian Wine Sector Survey. The information 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.

**Explanatory notes for planting data tables**

Regions are defined according to the Register of Australian Geographical Indications.

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 six, 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 2018 and include all plantings from the 2017 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 topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the 2018 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.

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.

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