SA Winegrape Crush Survey

Regional Summary Report 2018

Fleurieu Zone – other

Wine Australia August 2018

Fleurieu zone - other

Vintage overview

Fleurieu zone (other) includes the GI regions Southern Fleurieu and Kangaroo Island, as well as any other plantings in the zone that are near but outside the larger GI regions of Currency Creek, McLaren Vale and Langhorne Creek. The total area of vines included in this definition is 852 hectares.

OVERVIEW OF VINTAGE STATISTICS

The harvest from the Fleurieu zone - other areas was 4,200 tonnes in 2018, a 34% increase on the 3,053 tonnes crushed in 2017 and the highest since 2008.

Over the past five years, the average crush across Fleurieu zone – other has been 3,105 tonnes. The 2018 crush was 35% above the average. The minimum crush over the period was 2,831 tonnes in 2013.

The total estimated value of grapes from Fleurieu zone - other in 2018 was $3.7 million, compared with $2.8 million in 2017. This was a result of the higher tonnage combined with higher average prices for most varieties. The average purchase price for Shiraz increased by 16% to $1037 per tonne, while Cabernet Sauvignon increased by 13% to $1,213 per tonne. These increases reversed similar sized decreases last year.

On the other hand, Chardonnay declined by 15% to $528 per tonne and Sauvignon Blanc decreased by 9% to $700 per tonne.

The price dispersion data shows that 2% of red grapes were purchased at below $600 per tonne compared with 5% in 2017 – an upward shift in the price dispersion since last year. Conversely, for white varieties 37% were purchased at below $600 per tonne compared with 24% in 2017.

There have been no reported new plantings in Southern Fleurieu, Kangaroo Island, or elsewhere in Fleurieu zone – other for the past three years. The total area as at April 30, 2018 is 852 hectares – 90 hectares less than at the same time last year, and 120 hectares less than in 2013.

Fleurieu zone - other

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	5					5				10	66%	15	$33,365
Cabernet Sauvignon	277			260		17	$336,060	$1,213	13%	156	36%	433	$525,522
Grenache										7	100%	7	$2,881
Malbec	5			5						8	64%	13	$12,940
Merlot	68		25	43						77	53%	145	$105,091
Pinot Noir	126			105		22				8	6%	135	$169,501
Sangiovese										15	100%	15	$5,936
Shiraz	1,260		4	1,204	10	42	$1,305,700	$1,037	16%	165	12%	1,425	$1,477,247
Tempranillo	3					3				1	31%	5	$12,690
Red total	**1,744**		**29**	**1,616**	**10**	**89**	**$1,874,830**	**$1,075**	**12%**	**449**	**20%**	**2,193**	**$2,345,172**
White													
Chardonnay	509		383	126			$268,684	$528	-15%	85	14%	594	$313,614
Pinot Gris/Grigio	397			397						262	40%	659	$559,929
Riesling										5	100%	5	$1,644
Sauvignon Blanc	307		27	275	5		$214,757	$700	-9%	380	55%	687	$480,835
Semillon	54		54							7	11%	61	$24,356
Viognier										1	100%	1	$798
White total	**1,266**		**463**	**798**	**5**		**$842,098**	**$665**	**-7%**	**741**	**37%**	**2,007**	**$1,381,175**
Grand total	**3,010**		**492**	**2,415**	**14**	**89**	**$2,716,928**	**$902**	**5%**	**1,189**	**28%**	**4,200**	**$3,726,347**

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

Fleurieu zone - other

Current plantings by variety and year planted

Southern Fleurieu

	Year planted					
Variety	**Pre-2015**	**2015**	**2016**	**2017**	**Total area**	**% planted in 2017**
Red						
Cabernet Sauvignon	70	0	0	0	70	0%
Merlot	36	0	0	0	36	0%
Other red	4	0	0	0	4	0%
Pinot Noir	30	0	0	0	30	0%
Shiraz	124	0	0	0	124	0%
Total red varieties	**264**	**0**	**0**	**0**	**264**	**0%**
White						
Chardonnay	88	0	0	0	88	0%
Other white	5	0	0	0	5	0%
Pinot Gris	25	0	0	0	25	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	69	0	0	0	69	0%
Semillon	22	0	0	0	22	0%
Viognier	9	0	0	0	9	0%
Total white varieties	**221**	**0**	**0**	**0**	**221**	**0%**
Unknown variety	3	0	0	0	3	0%
Total all varieties	**488**	**0**	**0**	**0**	**488**	**0%**

Source: Vinehealth Australia

Fleurieu zone - other

Current plantings by variety and year planted

Year planted

Kangaroo Island

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
Cabernet Franc	5	0	0	0	5	0%
Cabernet Sauvignon	41	0	0	0	42	1%
Merlot	5	0	0	0	5	0%
Other red	7	0	0	0	7	0%
Shiraz	48	0	0	0	48	0%
Chardonnay	8	0	0	0	8	0%
Other white	4	0	0	0	4	0%
Riesling	3	0	0	0	3	0%
Sauvignon Blanc	7	0	0	0	7	0%
Unknown variety	5	0	0	0	5	0%
Total all varieties	**134**	**0**	**0**	**0**	**134**	**0%**

Fleurieu zone (other)

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
Cabernet Sauvignon	34	0	0	0	34	0%
Shiraz	92	0	0	0	92	0%
Other red	4	0	0	0	4	0%
Chardonnay	29	0	0	0	29	0%
Pinot Gris	16	0	0	0	16	0%
Sauvignon Blanc	13	0	0	0	13	0%
Other white	6	0	0	0	6	0%
Unknown variety	36	0	0	0	36	0%
Total all varieties	**230**	**0**	**0**	**0**	**230**	**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 pg6: Ian Routledge / Wine Australia

Disclaimer

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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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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