

SA Winegrape Crush Survey

Regional Summary Report 2018

Limestone Coast Zone – other

Wine Australia August 2018



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 9th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

**Mount Benson, Robe, Mt Gambier,
and Limestone Coast other
Wine Regions**



DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth make no representations, either express or implied, that the information displayed is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information displayed.

Limestone Coast zone - other

Vintage overview

Limestone Coast zone (other) includes the GI regions of Mt Benson, Mount Gambier and Robe, and the vineyards around Bordertown, Lucindale, and Beachport, as well as those near but outside the declared GI regions of Padthaway, Coonawarra and Wrattenbully. The total area of vines included in this definition is around 2,094 hectares.

Vintage report – Mount Benson

Mount Benson had an average winter and spring rainfall with a nice dry and calm flowering, leading to the potential for excellent yields. The region was affected by a late season frost which hit in early November with some growers more affected than others. Overall damage was around 20% of the region. We had an above average warm summer with nice dry conditions which kept disease pressure at a minimum and allowed for steady ripening and an early harvest.

Conditions during harvest were excellent, with nice steady warm weather leading to easy ripening and excellent quality. Yields were moderate overall, with some varieties cropping above average and some below average. Sauvignon Blanc and Shiraz are the main standouts for quality this year with other winemakers also particularly happy with Merlot, Cabernet Sauvignon and Pinot Gris. Overall a standout vintage, whites are highly aromatic and attractive with reds showing elegance, finesse and balance.

Anita Goode, President, Mount Benson Vignerons

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from the Limestone Coast zone (other) was 16,478 tonnes, compared with 22,154 tonnes in 2017, a decline of 26%. The 2018 crush was 7% below the five-year average (2013-2017) of 17,687 tonnes. The largest crush in the five-year period was the 2017 crush, while the lowest was 12,728 tonnes in 2014.

The total estimated value of fruit from this area was \$15.5 million, down 9% (\$1.5 million) from last year's total value of \$17 million, due to significant increases in the average prices paid for most varieties.

The average prices of all the major red varieties increased: Shiraz by 39% to \$1182 per tonne, Cabernet Sauvignon by 34% to \$1056 per tonne and Merlot by 7% to \$763 per tonne. These increases more than compensated for declines in 2017. In the white varieties, a decrease in the average price for Chardonnay of 5% per tonne to \$647 was offset by an increase of 3% in the average price for Sauvignon Blanc, to \$859 per tonne.

The price dispersion data shows an upward shift for red varieties, with 8% of red tonnages purchased at \$1500 per tonne or above, compared with 5% in 2017, while for the whites 86% of all fruit was purchased at between \$600 and \$1500 per tonne – down from 91% in 2017 as more was priced at below \$600 per tonne.

There were no changes to the plantings in these regions in the 2017 planting season. As at 30 April 2018, there was a total of 2,094 hectares planted, with the largest area being in Robe (738 hectares).

The variety distributions are quite different between the areas; Robe's leading variety is Cabernet Sauvignon and 70% of all plantings are red, while Mount Gambier has 64% white varieties, with Sauvignon Blanc accounting for 39% of all plantings. Mount Benson has a similar balance of red and white to Robe, but has more Shiraz than Cabernet Sauvignon.

Limestone Coast zone - other

Winegrape intake summary table

Incorporates Mount Benson (2813 tonnes), Mt. Gambier (1134 tonnes), Robe (2879 tonnes) and Limestone Coast zone – other including Bordertown (9652 tonnes)

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					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
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
Cabernet Franc	59		59							117	67%	175	\$87,640
Cabernet Sauvignon	2,264			2,084	135	45	\$2,391,597	\$1,056	34%	1,970	47%	4,234	\$4,472,129
Malbec	54			54						76	58%	131	\$101,402
Mataro/Mourvedre	265			265			\$186,911	\$706	1%	214	45%	479	\$337,921
Merlot	637		129	507			\$485,458	\$763	7%	1,576	71%	2,213	\$1,687,527
Petit Verdot	183		89	95			\$119,916	\$654		142	44%	326	\$213,014
Pinot Noir	375			375			\$397,173	\$1,060	1%	336	47%	711	\$753,483
Shiraz	2,595			2,287	252	56	\$3,067,088	\$1,182	39%	1,263	33%	3,858	\$4,559,123
Tempranillo										29	100%	29	\$43,490
Red total	6,432		277	5,667	387	101	\$6,719,582	\$1,045	30%	5,723	47%	12,155	\$12,255,731
White													
Chardonnay	809		254	555			\$523,342	\$647	-5%	1,520	65%	2,329	\$1,506,512
Marsanne	7			7							0%	7	\$4,080
Muscat Blanc a Petits Grains	27			27							0%	27	\$23,958
Pinot Gris/Grigio	127			127			\$139,886	\$1,103		2	2%	129	\$142,202
Sauvignon Blanc	1,357		55	1,303			\$1,165,721	\$859	3%	330	20%	1,687	\$1,448,885
Semillon	9		9							136	94%	145	\$72,400
White total	2,336		318	2,018			\$1,861,337	\$797	1%	1,988	46%	4,323	\$3,198,037
Grand total	8,767		594	7,685	387	101	\$8,580,919	\$979	22%	7,711	47%	16,478	\$15,453,768

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

Limestone Coast zone - other

Current plantings by variety and year planted

Mount Benson

Variety	Year planted				Total area	% planted in 2017
	Pre-2015	2015	2016	2017		
Red winegrapes						
Cabernet Sauvignon	114	0	0	0	114	0%
Merlot	52	0	0	0	52	0%
Pinot Noir	2	0	0	0	2	0%
Shiraz	167	0	4	0	171	0%
Other red	5	0	0	0	5	0%
Total red varieties	340	0	4	0	344	0%
White winegrapes						
Chardonnay	39	0	0	0	39	0%
Pinot Gris	42	0	0	0	42	0%
Sauvignon Blanc	67	0	0	0	67	0%
Other white	17	0	0	0	17	0%
Total white varieties	164	0	0	0	164	0%
Total all varieties	504	0	4	0	508	0%

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

Mount Gambier

Year planted

Variety	Pre-2015	2015	2016	2017	Total area	% planted in 2017
Red winegrapes						
Cabernet Sauvignon	10	0	0	0	10	0%
Merlot	1	0	0	0	1	0%
Pinot Noir	79	0	0	0	79	0%
Shiraz	0	0	0	0	0	0%
Other red	0	0	0	0	0	0%
Total red varieties	90	0	0	0	90	0%
White winegrapes						
Chardonnay	42	0	0	0	42	0%
Pinot Gris	14	0	0	0	14	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	98	0	0	0	98	0%
Semillon	1	0	0	0	1	0%
Other white	1	0	0	0	1	0%
Total white varieties	161	0	0	0	161	0%
Total all varieties	251	0	0	0	251	0%

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

Robe

Variety	Year planted				Total area	% planted in 2017
	Pre-2015	2015	2016	2017		
Red winegrapes						
Cabernet Sauvignon	235	0	0	0	235	0%
Merlot	58	0	0	0	58	0%
Pinot Noir	46	0	0	0	46	0%
Shiraz	171	0	0	0	171	0%
Other red	5	0	0	0	5	0%
Total red varieties	515	0	0	0	515	0%
White winegrapes						
Chardonnay	76	0	0	0	76	0%
Pinot Gris	15	0	0	0	15	0%
Sauvignon Blanc	43	0	0	0	43	0%
Semillon	12	0	0	0	12	0%
Total white varieties	147	0	0	0	147	0%
Unknown variety	76	0	0	0	76	0%
Total all varieties	738	0	0	0	738	0%

Source: Vinehealth Australia

Limestone Coast zone - other

Current plantings by variety and year planted

Limestone Coast zone (other)	Year planted				Total area	% planted in 2017
	Pre-2015	2015	2016	2017		
Variety						
Red winegrapes						
Cabernet Sauvignon	344	0	0	0	344	0%
Merlot	45	0	0	0	45	0%
Pinot Noir	10	0	0	0	10	0%
Shiraz	136	0	0	0	136	0%
Other red	5	0	0	0	5	0%
Total red varieties	540	0	0	0	540	0%
White winegrapes						
Chardonnay	41	0	0	0	41	0%
Pinot Gris	1	0	0	0	1	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other white	2	0	0	0	2	0%
Total white varieties	57	0	0	0	57	0%
Total all varieties	597	0	0	0	597	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 8: 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 receipt – 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.