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SA Winegrape Crush Survey

Regional Summary Report 2017

Currency Creek Wine Region

Wine Australia July 2017

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

Currency Creek Wine Region



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Currency Creek

Vintage overview

VINTAGE REPORT

After a variable start to bud burst and the season providing many disease challenges during the growing period and around veraison, a stretch of about four weeks of ideal ripening weather in the middle of vintage saved the season at Currency Creek.

Good late winter rainfall created ideal opening sub-soil moisture, a situation that prevailed during the whole growing season. Shoot length was short during the early part of the season due to cooler than average temperatures but caught up later in the season.

The weather conditions at flowering were variable but allowed good fruit set in most red varieties as well as Sauvignon Blanc and Pinot Gris. Chardonnay was the big loser with very poor set leading to severely reduced yields.

Disease pressure throughout the season was high, resulting in double the normal number of fungicides being applied, and harvest was three weeks later than average.

Whites benefited from the cooler climatic conditions and maritime influence of the Currency Creek region, with good fruit ripeness and naturally balanced acidity.

The reds were left hanging to gain full physiological maturity and were picked very late this year, with first fruit coming in from about 10th April and a compressed harvest program completed by 3rd May. Such prolonged hang time resulted in great varietal character and colour and red variety yields were generally as expected.

David Watkins, Currency Creek Wine Region Association

OVERVIEW OF VINTAGE STATISTICS

The reported harvest from Currency Creek in 2017 was 9,211 tonnes, down on the 2016 harvest of 10,169 tonnes but up on the 2014 harvest of 7,595 tonnes.

Over the past five years, the average crush for the region is 8,855 tonnes. The 2016 crush was the highest in the five year period, while the minimum crush over the period was 7,269 tonnes in 2014. The 2017 crush was 4% above the five-year average.

The value of fruit from the region was \$7 million, compared with \$8.5 million in 2016, as a result of the lower tonnes crushed and a decline in average prices. Average prices for the two main varieties both declined – Shiraz by 4% to \$836 per tonne and Cabernet Sauvignon by 14% to \$783 per tonne.

The price dispersion data shows that 83% of red tonnages were purchased at between \$600 and \$1500, while 41% of the white tonnes were purchased within the same price.

There were no new plantings recorded for the region for the second year in a row. Total plantings are 968 hectares, three-quarters of which are red varieties.

Currency Creek

Winegrape intake summary table

Variety	Tonnes purchased	E (less than \$300)	D (\$300-\$600)	C (\$600-\$1,500)	B (\$1,500-\$2,000)	A (above \$2000)	Total value purchased	Calc avg. purch value per tonnes	Change in price YoY	Winery grown fruit	Share of own grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Sauvignon	804	11%	7%	92%			\$629,481	\$783	-14%	1672	65%	2556	\$2,000,100
Durif										73	100%	73	\$59,522
Grenache										73	100%	73	\$59,752
Lagrein	10											10	\$11,374
Malbec										9	100%	9	\$7,153
Merlot	91									454	83%	545	\$399,976
Nero d'Avola	9											9	\$10,318
Pinot Noir										44	100%	44	\$36,422
Sangiovese	39											39	\$35,355
Shiraz	1155	25%	13%	83%	4%		\$966,005	\$836	-4%	1873	57%	3315	\$2,771,236
Tempranillo	42	17%		67%	33%		\$45,750	\$1,097	-12%			49	\$53,430
Total red	2152	18%	11%	86%	3%		\$1,765,205	\$820	-7%	4197	62%	6722	\$5,444,637
White													
Chardonnay	130		97%	3%			\$57,225	\$441		656	83%	786	\$346,538
Gewurztraminer										122	100%	122	\$84,536
Pinot Gris/Grigio	49			100%			\$53,260	\$1,082	-6%	272	85%	321	\$347,648
Prosecco	33											33	\$42,770
Sauvignon Blanc	186		72%	28%			\$109,683	\$590	-4%	998	84%	1184	\$698,767
Vermentino	42											42	\$41,203
Total white	440		59%	41%			\$304,141	\$691	-4%	2049	82%	2489	\$1,561,462
Total all varieties	2592	15%	19%	78%	2%	0%	\$2,069,346	\$798	-7%	6246	68%	9211	\$7,006,099

Currency Creek

Current plantings by variety and year planted

Variety	Current area in hectares				2016 Total area	% planted in 2016
	Pre-2014	2014	2015	2016		
Red winegrapes						
Cabernet Sauvignon	291	2	0	0	294	0%
Grenache	11	0	0	0	11	0%
Lagrein	1	0	0	0	1	0%
Merlot	61	0	0	0	61	0%
Nebbiolo	1	0	0	0	1	0%
Other Red	2	15	0	0	17	0%
Petit Verdot	4	0	0	0	4	0%
Pinot Noir	11	0	0	0	11	0%
Sangiovese	4	0	0	0	4	0%
Shiraz	326	3	0	0	329	0%
Tempranillo	5	0	0	0	5	0%
Total red varieties	716	20	0	0	736	0%
White winegrapes						
Chardonnay	111	0	0	0	111	0%
Other White	18	0	0	0	18	0%
Pinot Gris	17	12	0	0	29	0%
Sauvignon Blanc	55	0	0	0	55	0%
Semillon	8	0	0	0	8	0%
Vermentino	2	0	0	0	2	0%
Viognier	6	0	0	0	6	0%
Total white varieties	218	12	0	0	230	0%
Unknown variety	2	0	0	0	2	0%
Total all varieties	936	32	0	0	968	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 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 88%; 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 2017).

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.

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. It should also be noted that in minor varieties there may sometimes be very few purchases contributing towards a calculated average purchase value.

Price dispersion data (shaded columns in Intake Summary tables)

All purchases for each variety are grouped into categories according to the price paid for that fruit. The tonnes in each category are converted into a percentage of the total tonnes purchased, giving an indication of what share of fruit was purchased in each price range category. The categories are given nominal titles of A to E for convenience but these do not correspond with grades used by any particular winery.

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 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 cont.d

PLANTING DATA

Source of planting data tables

Planting data is not collected by the 2017 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.

Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from Vinehealth Australia.

For more information on registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2017 and include all plantings from the 2016 planting season.
2. 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 2017 report compared with previous reports.
3. 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 variations between tables.

AUSTRALIAN WINE SECTOR SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian Wine Sector 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 provided by Brendan Tully, Vinehealth Australia.

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

Disclaimer

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Any questions about the report should be directed to:

Wine Australia
+618 8228 2000
information@wineaustralia.com