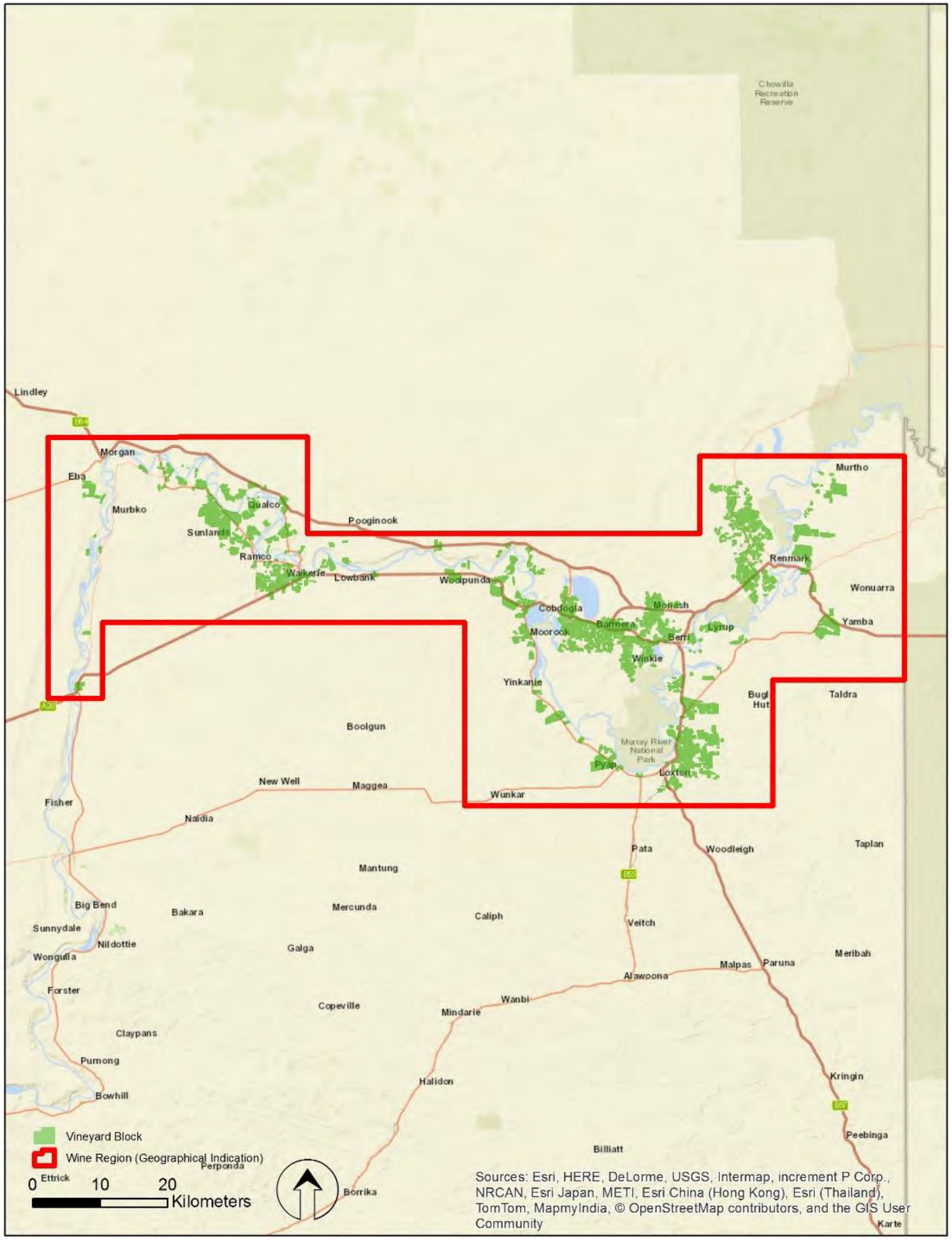



DATUM: GDA94
PROJECTION: MGA Zone 54
DATE: 8th March 2017
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Riverland Wine Region

Vinehealth Australia

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.

# SA Winegrape Crush Survey

# Regional Summary Report 2018

# Riverland Wine Region

*Wine Australia August 2018*

# Riverland

## Vintage overview

### VINTAGE REPORT

The 2018 vintage highlight was the demand for fruit and lack of rain during vintage which was a pleasant change for growers. The winemakers were actively competing for the major reds and whites, culminating in higher prices for most varieties.

Despite a relatively dry winter, even for the Riverland, budburst was even and the timing was about on par with previous years; however, the dry soil caused many growers to irrigate a bit earlier than normal. From October to December we had one good rain each month which did not cause any disease problems, allowing growers to minimise downy mildew sprays.

From early December onwards there was very little rain, with above average temperatures and a four day stretch in mid-January of above 40 degrees. Apart from a little leaf scorch this did not appear to do any damage to the fruit unlike other years.

Harvest of the whites started in late January which is about normal. They came in quite quickly and due to the lack of rain it was good clean fruit which resulted in good quality wine. Reports indicate that the yields for all the white varieties except Chardonnay will be below the 3-year average.

Unlike the last few years where we had the reds ripening at the same time as the whites, the wineries were able to process most of the whites before the reds really started. The reds' ripening also slowed from about the middle of February until early March; however they increased after that creating a frenzy to get them crushed within the preferred parameters.

The crop levels for all the reds, while being below last year's exceptionally high levels, were close to the three year average. Vintage was all over by early April, about three weeks earlier than the extended 2017 vintage.

*Jim Caddy, CCW*

### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from the Riverland in 2018 was 447,410 tonnes, 5% below the near-record 2017 crush of 470,123 tonnes, but just above the five-year (2013-2017) average crush for the Riverland of 442,774 tonnes.

Despite the reduced tonnage, the total estimated value of all grapes increased by 9%, from $162 million to $176 million, as a result of a 14% increase in the overall average price paid.

The average prices for all major red varieties increased. Shiraz was up by 23% to $487 per tonne, and Cabernet Sauvignon by 19% to $466 per tonne. For whites, Chardonnay increased by 5% to $327 per tonne, despite having an increased tonnage against the general trend. Sauvignon Blanc increased by 8% to $411 per tonne. These increases follow similar increases in 2017, and the average prices for all the top three varieties are now the highest since 2008.

The price dispersion data shows an upward shift in dispersion, with purchases of more red varieties shifting into the $600 per tonne or above bracket than last year, and very few red grapes purchased at below $300 per tonne. For the whites, 28% were purchased at below $300 per tonne, compared with 35% in 2017.

There were 56 hectares of new plantings in the 2017 planting season, compared with 202 hectares the previous year. Cabernet Sauvignon (19 hectares) and Pinot Gris/Grigio (14 hectares) were the main contributors to the new plantings. The non-bearing area of Pinot Gris is currently over one-third of its total area.

There was a net increase in total vineyard area in the Riverland of around 35 hectares after a decline of 300 hectares last year. The total planted area is 20,339 hectares, 400 hectares less than it was in 2013.

# Riverland

## Winegrape intake summary table - red

| | 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** | | | | | | | | | | | | | |
| Barbera | 6 | | 6 | | | | | | | 23 | 80% | 29 | $10,911 |
| Cabernet Franc | 4 | | 4 | | | | | | | | 0% | 4 | $1,517 |
| Cabernet Sauvignon | 49,489 | | 49,266 | 222 | | | $23,062,955 | $466 | 19% | 13,968 | 22% | 63,457 | $29,572,576 |
| Dolcetto | 3 | | 3 | | | | | | | | 0% | 3 | $1,228 |
| Durif | 563 | | 192 | 371 | 1 | | $329,254 | $585 | 18% | 271 | 32% | 834 | $487,585 |
| Grenache | 3,329 | | 3,308 | 21 | | | $1,322,198 | $397 | 19% | 362 | 10% | 3,691 | $1,465,902 |
| Lagrein | 22 | | 6 | 13 | 3 | | $20,786 | $926 | 2% | | 0% | 22 | $20,786 |
| Malbec | 194 | | 194 | | | | | | | 92 | 32% | 286 | $105,813 |
| Mataro/Mourvedre | 2,641 | | 2,597 | 45 | | | $1,173,026 | $444 | 26% | 168 | 6% | 2,809 | $1,247,517 |
| Merlot | 17,001 | | 16,958 | 43 | | | $7,609,007 | $448 | 15% | 7,316 | 30% | 24,317 | $10,883,243 |
| Montepulciano | 109 | | 49 | 56 | 5 | | $73,885 | $676 | 8% | 48 | 31% | 157 | $106,317 |
| Muscat Rouge a Petits Grains | 185 | | 185 | | | | | | | | 0% | 185 | $81,063 |
| Petit Verdot | 5,734 | | 5,709 | 25 | | | $2,399,952 | $419 | 18% | 5,946 | 51% | 11,681 | $4,888,664 |
| Pinot Noir | 7,734 | | 7,734 | | | | $3,355,645 | $434 | 13% | 1,043 | 12% | 8,777 | $3,808,125 |
| Ruby Cabernet | 903 | | 890 | 12 | | | $380,278 | $421 | 20% | 974 | 52% | 1,876 | $790,423 |
| Sangiovese | 73 | | 71 | 2 | | | $33,382 | $458 | | 317 | 81% | 390 | $178,763 |
| Shiraz | 86,072 | | 85,264 | 808 | | | $41,883,819 | $487 | 23% | 24,213 | 22% | 110,286 | $53,666,304 |
| Tarrango | 210 | 210 | | | | | | | | | 0% | 210 | $49,672 |
| Tempranillo | 663 | | 663 | | | | $303,070 | $457 | 7% | 222 | 25% | 886 | $404,696 |
| Other red | 1,125 | | 1,079 | 41 | 4 | | $533,935 | $475 | 2% | 605 | 35% | 1,729 | $821,020 |
| **Red total** | **176,062** | **210** | **174,180** | **1,659** | **13** | | **$82,688,619** | **$470** | **20%** | **55,569** | **24%** | **231,631** | **$108,592,124** |

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

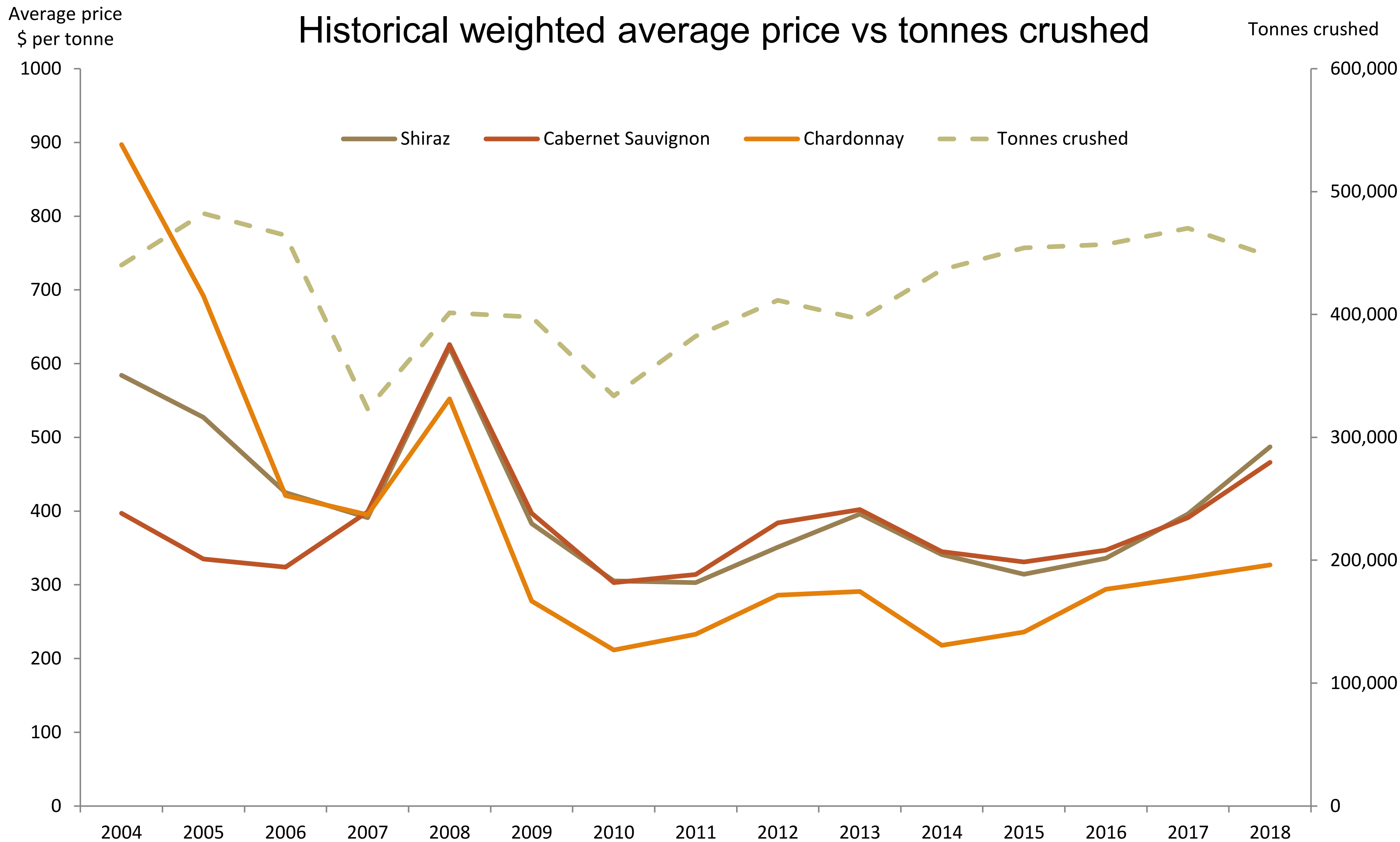
# Riverland

## Winegrape intake summary table - white

| | 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **White** | | | | | | | | | | | | | |
| Canada Muscat | 33 | | 33 | | | | | | | 98 | 75% | 131 | $65,450 |
| Chardonnay | 101,989 | | 101,629 | 359 | | | $33,346,022 | $327 | 5% | 19,929 | 16% | 121,918 | $39,861,919 |
| Chenin blanc | 1,559 | 1,550 | 10 | | | | $387,444 | $248 | 10% | 11 | | 1,570 | $390,181 |
| Colombard | 23,087 | 23,080 | 7 | | | | $5,541,579 | $240 | 8% | 3,477 | 13% | 26,563 | $6,376,073 |
| Doradillo | 42 | 42 | | | | | | | | 7 | 14% | 49 | $10,976 |
| Fiano | 148 | | 145 | 4 | | | | | | 3 | 2% | 152 | $69,900 |
| Gewurztraminer | 1,350 | 7 | 1,343 | | | | $464,969 | $344 | -9% | 1,411 | 51% | 2,761 | $951,067 |
| Moscato Giallo | 66 | | 66 | | | | | | | | 0% | 66 | $19,812 |
| Muscadelle (Tokay) | 32 | 32 | | | | | | | | 37 | 54% | 70 | $20,605 |
| Muscat Blanc a Petits Grains | 3,619 | 57 | 3,562 | | | | $1,181,559 | $326 | 6% | 447 | 11% | 4,066 | $1,327,393 |
| Muscat Gordo Blanco | 21,927 | 21,581 | 346 | | | | $5,211,809 | $238 | 3% | 2,204 | 9% | 24,131 | $5,735,781 |
| Pinot Gris/Grigio | 2,225 | | 2,225 | | | | $1,134,167 | $510 | 1% | 556 | 20% | 2,781 | $1,417,376 |
| Riesling | 2,249 | 65 | 2,184 | | | | $763,157 | $339 | 6% | 597 | 21% | 2,847 | $965,900 |
| Roussanne | 7 | 7 | | | | | | | | | 0% | 7 | $1,890 |
| Sauvignon Blanc | 12,523 | | 12,523 | | | | $5,144,411 | $411 | 8% | 3,344 | 21% | 15,867 | $6,517,891 |
| Semillon | 4,014 | 2,739 | 1,275 | | | | $1,153,063 | $287 | 7% | 3,658 | 48% | 7,672 | $2,203,994 |
| Sultana | 486 | 466 | 20 | | | | $116,819 | $240 | 12% | | 0% | 486 | $116,819 |
| Verdelho | 1,901 | 747 | 1,154 | | | | $721,591 | $380 | 11% | 72 | 4% | 1,973 | $748,857 |
| Vermentino | 338 | 35 | 208 | 95 | | | $157,743 | $467 | 13% | 234 | 41% | 572 | $267,015 |
| Viognier | 1,007 | 79 | 737 | 191 | | | $435,326 | $432 | 18% | 504 | 33% | 1,511 | $653,134 |
| Other white | 413 | 400 | 4 | 9 | | | $99,777 | $242 | 0% | 175 | 30% | 588 | $142,107 |
| **White total** | **179,016** | **50,888** | **127,470** | **658** | | | **$55,985,057** | **$313** | **6%** | **36,764** | **17%** | **215,779** | **$67,864,140** |
| **Grand total** | **355,078** | **51,098** | **301,650** | **2,317** | **13** | | **$138,673,676** | **$391** | **14%** | **92,332** | **21%** | **447,410** | **$176,456,265** |

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

# Riverland


Historical weighted average price vs tonnes crushed
Average price
$ per tonne
Tonnes crushed
Shiraz
Cabernet Sauvignon
Chardonnay
Tonnes crushed
1000
900
800
700
600
500
400
300
200
100
0
600,000
500,000
400,000
300,000
200,000
100,000
0
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018

# Riverland

## Current plantings by variety and year planted – white winegrapes

| Variety | Year planted: Pre-2015 | 2015 | 2016 | 2017 | Total area | % planted in 2017 |
|---|---|---|---|---|---|---|
| **White winegrapes** | | | | | | |
| Chardonnay | 4,445 | 0 | 2 | 0 | 4,447 | 0% |
| Chenin Blanc | 84 | 0 | 0 | 0 | 84 | 0% |
| Colombard | 783 | 1 | 0 | 0 | 784 | 0% |
| Doradillo | 36 | 0 | 0 | 0 | 36 | 0% |
| Muscadelle (Tokay) | 11 | 0 | 0 | 0 | 11 | 0% |
| Muscat A Petit Grains Blanc (White Frontignac) | 127 | 0 | 0 | 0 | 127 | 0% |
| Muscat Gordo Blanco | 962 | 6 | 0 | 1 | 968 | 0% |
| Palomino | 8 | 0 | 0 | 0 | 8 | 0% |
| Pinot Gris | 94 | 7 | 33 | 14 | 148 | 10% |
| Riesling | 167 | 0 | 0 | 0 | 167 | 0% |
| Sauvignon Blanc | 519 | 0 | 16 | 6 | 541 | 1% |
| Semillon | 335 | 0 | 0 | 0 | 335 | 0% |
| Sultana | 146 | 0 | 0 | 0 | 146 | 0% |
| Traminer (Gewurztraminer) | 115 | 0 | 0 | 0 | 115 | 0% |
| Trebbiano | 15 | 0 | 0 | 0 | 15 | 0% |
| Verdelho | 93 | 0 | 0 | 0 | 93 | 0% |
| Vermentino | 17 | 0 | 0 | 0 | 17 | 0% |
| Viognier | 120 | 0 | 0 | 0 | 120 | 0% |
| Other white | 57 | 4 | 1 | 0 | 62 | 0% |
| **Total white varieties** | **8,134** | **18** | **52** | **21** | **8,225** | **0%** |

*Source: Vinehealth Australia*

# Riverland

## Current plantings by variety and year planted – white winegrapes

| | Year planted | | | | | |
|---|---|---|---|---|---|---|
| **Variety** | **Pre-2015** | **2015** | **2016** | **2017** | **Total area** | **% planted in 2017** |
| **Red winegrapes** | | | | | | |
| Cabernet Sauvignon | 3,200 | 28 | 30 | 19 | 3,277 | 1% |
| Grenache | 341 | 0 | 0 | 0 | 341 | 0% |
| Malbec | 23 | 0 | 3 | 0 | 26 | 0% |
| Mataro (Mourvedre) | 239 | 0 | 0 | 0 | 239 | 0% |
| Merlot | 1,169 | 9 | 4 | 3 | 1,185 | 0% |
| Petit Verdot | 496 | 0 | 0 | 0 | 496 | 0% |
| Pinot Noir | 290 | 0 | 0 | 0 | 290 | 0% |
| Ruby Cabernet | 120 | 0 | 0 | 0 | 120 | 0% |
| Sangiovese | 14 | 0 | 0 | 4 | 18 | 20% |
| Shiraz | 5,366 | 65 | 92 | 3 | 5,526 | 0% |
| Tempranillo | 52 | 2 | 0 | 0 | 54 | 0% |
| Other red | 125 | 9 | 21 | 6 | 161 | 4% |
| **Total red varieties** | **11,435** | **113** | **150** | **35** | **11,733** | **0%** |
| Unknown variety | 246 | 0 | 0 | 0 | 246 | 0% |
| Rootstock Block | 25 | 0 | 0 | 0 | 25 | 0% |
| Table grapes - red | 28 | 1 | 0 | 0 | 29 | 0% |
| Table grapes - white | 11 | 16 | 0 | 0 | 27 | 0% |
| Multi-purpose red | 62 | 0 | 0 | 0 | 63 | 0% |
| Multi-purpose white | 25 | 2 | 0 | 0 | 27 | 0% |
| **Total all varieties** | **19,966** | **150** | **202** | **56** | **20,375** | **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:

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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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