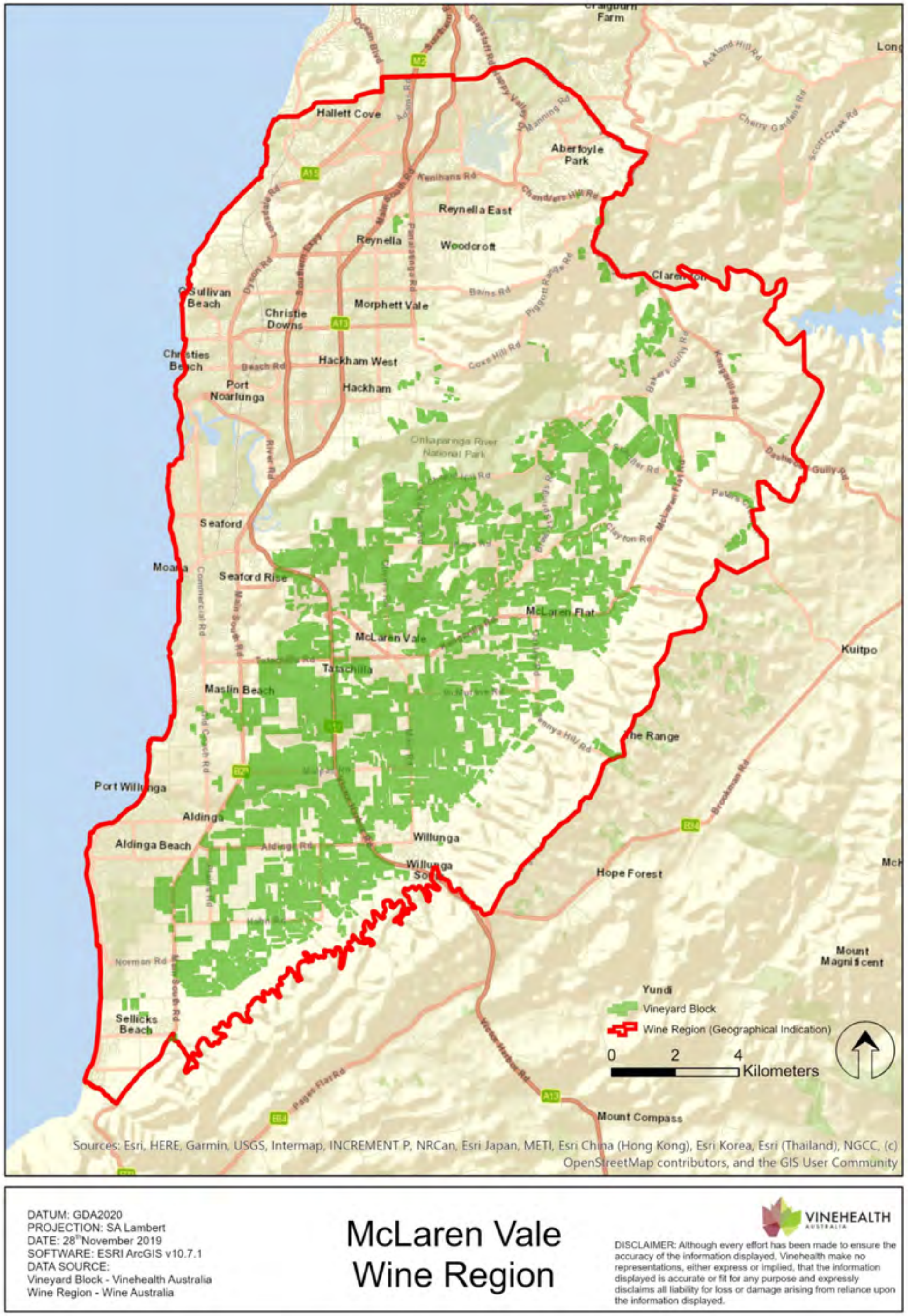


SA Winegrape Crush Survey 2022

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2022

McLaren Vale

Vintage overview

VINTAGE REPORT

There were key climatic similarities between Vintage 2022 and the preceding Vintage 2021. This bodes well for wine quality as Vintage 2021 is already highly regarded.

Vines held condition well due to a cool summer, and winemaking was made easier by gentle ripening conditions. While it was a wet La Niña-influenced year for other parts of Australia, McLaren Vale vineyards received below average rainfall. Like the previous year, the season started with above average winter and early spring rains, before experiencing dry conditions throughout summer and autumn, leading to lower rainfall overall.

Unfortunately, tonnages were lower than those of 2021. The lower yields were largely due to cold and windy weather during flowering (mid spring). Additionally, November was about 1.5°C cooler than average. This contributed to a lower percentage of berry set, with fewer berries per bunch. Berry set was lowest for vineyards close to the Gulf of St Vincent where they are most exposed to cold south-westerly winds.

Like 2021, the 2022 season had a mild summer without heatwave conditions. January and February 2022 recorded no days above 40°C. The mild summer was followed by a warm autumn. This produced a gentle and slow ripening period and delayed harvest. Both seasons had late Veraison colour change dates, and correspondingly later harvest dates.

Grape picking took eight weeks to complete starting at full pace in the first week of March and ending in the second week of April. Both 2021 and 2022 vintages were drawn out compared with recent experience.

Overall, we would rank Vintage 2022 right up there for quality. Reds have intense, rich and balanced flavours and colours. Whites have pretty aromatics and natural acidity.

James Hook, for McLaren Vale Grape, Wine and Tourism Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from McLaren Vale was 34,990 tonnes in 2022, down by 6 per cent compared with the 2021 reported crush of 37,278 tonnes. The crush was just below the five-year average (2017–2021) of 35,869 tonnes. McLaren Vale moved up to fifth-largest region, overtaking Padthaway and just below Coonawarra.

There were a record 95 respondents to the survey who reported crushing grapes from McLaren Vale in 2022, compared with 86 in 2021. Despite this, it is known that the non-response rate in terms of tonnes is relatively high in this region and the true crush is likely to be closer to 50,000 tonnes.

The total estimated value of winegrapes from McLaren Vale in 2022 was just under $64 million compared with $73 million in 2021 – a decrease of 13 per cent. The overall average value declined by 7 per cent from $1946 per tonne to $1809 per tonne.

Grenache had the highest average value at $2290 per tonne (down 1 per cent) followed by Shiraz (down 9 per cent to $1896 per tonne). Cabernet Sauvignon decreased by 8 per cent to $1760 per tonne, while the average value for Chardonnay increased by 13 per cent to $1165 per tonne.

The price dispersion data shows a slight downward shift in prices compared with last year, with 41 per cent of red grapes purchased at $2000 per tonne and above, compared with 50 per cent last year.

According to Vinehealth Australia data, the total vineyard area in McLaren Vale as at 30 April 2022 is 7377 hectares, compared with 7414 hectares in 2021. The total area is around 60 hectares more than it was 5 years ago.

There were 41 hectares of new plantings (including top-working and replacements) in the 2021-22 planting season, including 12 hectares of Shiraz, 10 hectares of Grenache and 9 hectares of Fiano.

McLaren Vale

Winegrape intake summary table – reds

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Barbera	17				4	18%	21	$45,870
Cabernet Franc	41	$74,257	$1,826	35%	8	16%	48	$88,095
Cabernet Sauvignon	3,299	$5,787,047	$1,760	-8%	3,249	50%	6,547	$11,505,052
Durif	11	$18,322	$1,678	14%	4	28%	15	$25,570
Graciano	19				23	54%	41	$95,354
Grenache	945	$2,163,165	$2,290	-1%	781	45%	1,726	$3,951,398
Lagrein	2				4	61%	6	$9,687
Malbec	29	$62,520	$2,143	17%	28	49%	57	$122,283
Mataro/Mourvedre	318	$580,509	$1,824	2%	188	37%	506	$922,883
Merlot	541	$683,747	$1,264	1%	314	37%	855	$1,080,580
Montepulciano	41	$84,082	$2,063	22%	52	56%	93	$192,008
Muscat à Petits Grains Rouges					22	100%	22	$27,399
Nebbiolo					8	100%	8	$20,038
Nero d'Avola	67	$143,526	$2,135	-7%	25	27%	92	$196,956
Petit Verdot	11				147	93%	158	$241,925
Pinot Noir	314	$420,172	$1,340	12%	41	11%	354	$474,478
Sangiovese	266	$509,726	$1,913	17%	194	42%	460	$880,446
Shiraz	12,317	$23,307,179	$1,896	-9%	8,184	40%	20,500	$38,823,095
Tempranillo	171	$342,097	$1,995	4%	166	49%	338	$673,418
Touriga Nacional	25	$56,996	$2,242	7%	70	73%	95	$213,973
Other red	84	$167,469	$1,997	2%	199	70%	283	$503,235
Red Total	**18,518**	**$34,502,677**	**$1,867**	**-7%**	**13,709**	**43%**	**32,227**	**$60,093,744**

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

McLaren Vale

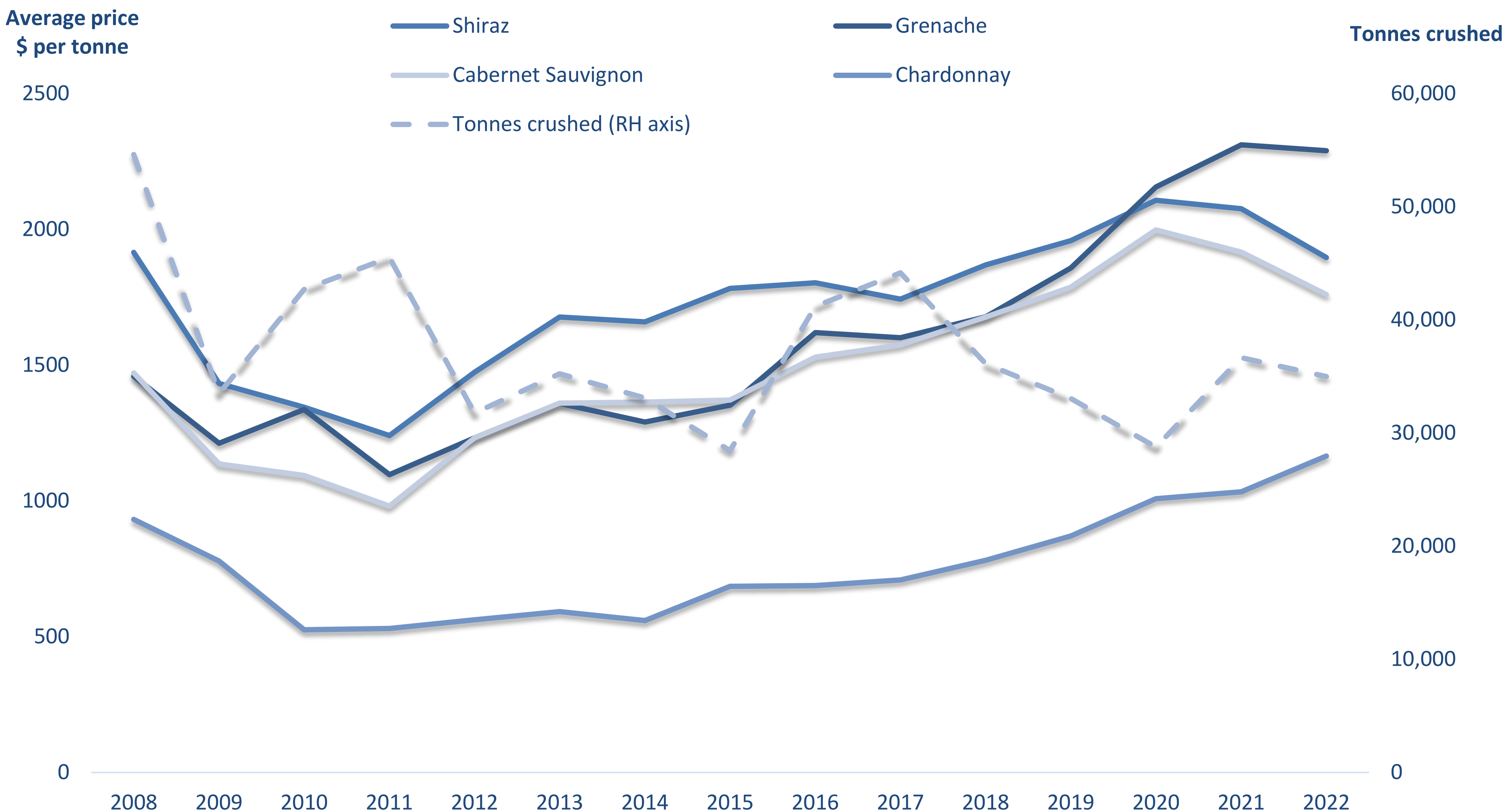
Winegrape intake summary table – whites

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
White								
Chardonnay	1,377	$1,604,478	$1,165	13%	257	16%	1,634	$1,903,829
Chenin blanc	45	$66,903	$1,478	-2%	28	39%	74	$108,840
Fiano	49	$96,765	$1,959	5%	72	59%	121	$237,031
Gewürztraminer	6						6	$7,319
Marsanne	13				30	69%	44	$69,632
Muscat à Petits Grains Blancs	50	$61,704	$1,223	0%	8	14%	59	$71,962
Pinot Gris/Grigio					112	100%	112	$147,711
Prosecco	4						4	$7,403
Riesling	76	$109,908	$1,442	11%	14	15%	90	$129,446
Roussanne					12	100%	12	$22,115
Sauvignon Blanc	78	$125,440	$1,599	46%	100	56%	179	$285,866
Semillon					56	100%	56	$62,003
Verdelho	115	$129,619	$1,128	0%	15	11%	130	$146,342
Vermentino	25	$51,785	$2,039	-7%	38	60%	63	$129,136
Viognier	87	$137,916	$1,581	4%	59	40%	146	$230,772
Other white	32	$64,588	$1,989	0%	1	4%	34	$67,807
White Total	**1,960**	**$2,485,331**	**$1,268**	**9%**	**803**	**29%**	**2,763**	**$3,627,213**
Grand Total	**20,478**	**$36,988,009**	**$1,809**	**-7%**	**14,512**	**41%**	**34,990**	**$63,720,957**

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

McLaren Vale

Historical weighted average price vs tonnes crushed



McLaren Vale

Price dispersion – purchased grapes (reds)

	Tonnes purchased in each segment						
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Unspecified**	**Total purchased**
Red							
Barbera					17		17
Cabernet Franc			22	7	12		41
Cabernet Sauvignon	35	69	564	1,843	787		3,299
Durif			5	2	4		11
Graciano					19		19
Grenache		0	35	114	795		945
Lagrein				2			2
Malbec				24	5		29
Mataro/Mourvedre		3	20	229	67		318
Merlot		48	358	89	45		541
Montepulciano				5	35		41
Nero d'Avola				27	40		67
Petit Verdot			2	9			11
Pinot Noir			251	35	27		314
Sangiovese				207	59		266
Shiraz	68	372	1,698	4,713	5,436	31	12,317
Tempranillo				67	104		171
Touriga Nacional				1	24		25
Other red				21	63	0	84
Red Total	**103**	**492**	**2,956**	**7,398**	**7,539**	**31**	**18,518**

McLaren Vale

Price dispersion – purchased grapes (whites)

	Tonnes purchased in each segment						
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Unspecified**	**Total purchased**
Chardonnay		426	770	181			1,377
Chenin blanc			10	35			45
Fiano				18	31		49
Gewürztraminer			6				6
Marsanne				13			13
Muscat à Petits Grains Blancs			47	4			50
Prosecco				4			4
Riesling			23	53			76
Sauvignon Blanc			38		40		78
Verdelho			100	15			115
Vermentino				5	21		25
Viognier		11		77	0		87
Other white				24	8		32
White Total		**437**	**994**	**429**	**100**		**1,960**
Total purchased	**103**	**928**	**3,950**	**7,826**	**7,640**	**31**	**20,478**

McLaren Vale

Current plantings by variety and year planted – reds

	Area (hectares)					
Variety	**Pre-2019**	**2019**	**2020**	**2021**	**Total area (Ha)**	**% planted in 2021**
Red winegrapes						
Aglianico	3	1	0	1	5	*20%*
Barbera	13	0	0	0	13	*0%*
Cabernet Franc	22	0	0	0	22	*0%*
Cabernet Sauvignon	1,299	11	29	0	1,339	*0%*
Carignan	5	0	0	0	5	*0%*
Cinsault	3	0	0	0	3	*0%*
Durif (Petite Sirah)	5	0	0	0	5	*0%*
Graciano	5	0	1	0	6	*0%*
Grenache	452	2	10	10	474	*2%*
Malbec	13	0	0	0	13	*0%*
Mataro (Mourvedre)	93	0	0	1	94	*1%*
Merlot	186	0	0	0	186	*0%*
Montepulciano	17	2	0	0	19	*0%*
Nebbiolo	2	0	0	0	2	*0%*
Nero d'Avola	18	3	0	2	23	*9%*
Petit Verdot	44	0	0	0	44	*0%*
Pinot Noir	46	0	0	0	46	*0%*
Sangiovese	42	0	0	0	42	*0%*
Saperavi	3	0	0	0	3	*0%*
Shiraz	4,096	31	63	12	4,202	*0%*
Tempranillo	65	0	4	4	73	*5%*
Touriga	20	1	0	0	21	*0%*
Zinfandel	4	0	0	0	4	*0%*
Other Red	36	0	0	1	37	*3%*
Total red varieties	**6,492**	**51**	**107**	**31**	**6,681**	***0%***

Source: Vinehealth Australia

McLaren Vale

Current plantings by variety and year planted – whites

	Area (hectares)					
Variety	**Pre-2019**	**2019**	**2020**	**2021**	**Total area (Ha)**	**% planted in 2021**
White winegrapes						
Chardonnay	277	0	0	0	277	*0%*
Chenin Blanc	15	0	0	0	15	*0%*
Colombard	1	0	0	0	1	*0%*
Fiano	20	8	4	9	41	*22%*
Muscat A Petit Grains Blanc (White Frontignac)	10	0	0	0	10	*0%*
Pinot Gris	23	0	0	0	23	*0%*
Riesling	28	0	0	0	28	*0%*
Roussanne	12	0	0	0	12	*0%*
Sauvignon Blanc	39	0	0	0	39	*0%*
Semillon	17	0	0	0	17	*0%*
Verdelho	15	0	0	0	15	*0%*
Vermentino	5	0	1	0	6	*0%*
Viognier	49	0	0	0	49	*0%*
Other White	27	2	0	0	29	*0%*
Total white varieties	**538**	**10**	**5**	**9**	**562**	***2%***
Rootstock Block	4	0	0	0	4	*0%*
Unknown variety	130	0	0	0	130	*0%*
Total all varieties	**7,164**	**61**	**112**	**40**	**7,377**	**1%**

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 89 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 specific amounts paid for 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 2022).

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. However the values are included in the calculation of totals for each 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 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.

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.

Explanatory notes for planting data tables

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 seven, or red variety in the top five by planted area for the state for the current year.

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- Planting data tables are current as at 30 April 2022 and include all plantings from the 2021–22 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 top-worked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current 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.

Acknowledgements

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.

The survey publication is available on 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 www.winesa.asn.au.

Survey results from 2015 onwards are available on the Wine Australia interactive Vintage Survey Dashboard:
https://marketexplorer.wineaustralia.com/vintage-survey

About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), growing domestic and international markets, protecting the reputation of Australian wine.

Wine Australia is an Australian Commonwealth Government statutory authority, established under the *Wine Australia Act 2013*, and funded by grape growers and winemakers through levies and user-pays charges and the Australian Government, which provides matching funding for RDA investments.

Credits

Images – Wine Australia
GI maps – Vinehealth 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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