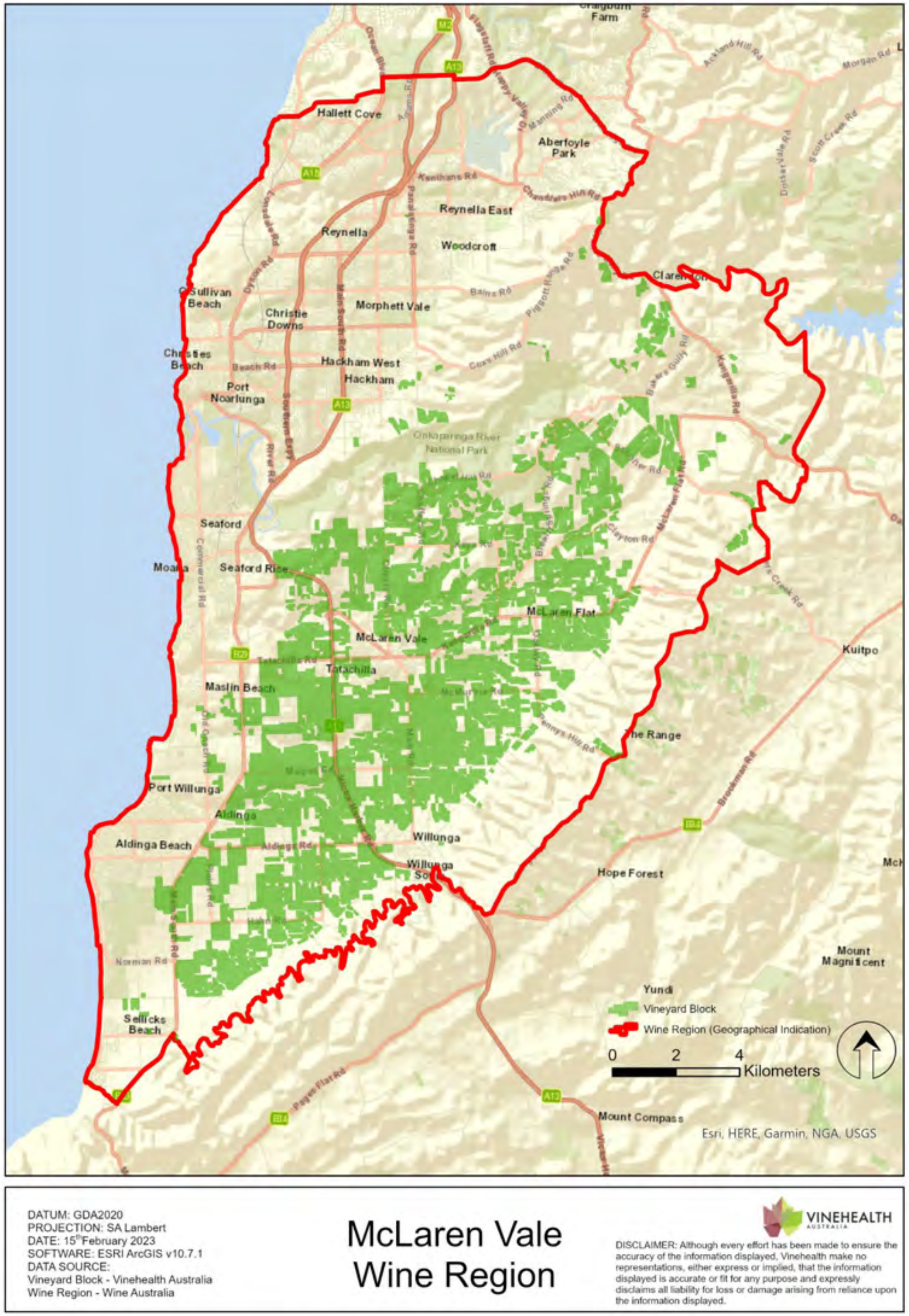


SA Winegrape Crush Survey 2023

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2023

McLaren Vale

Vintage overview

VINTAGE REPORT

The McLaren Vale wine region experienced good winter rains filling the soil profile in readiness for spring. Continued wet and cold conditions throughout spring delayed budburst and resulted in slower shoot growth. Spring rainfall was higher than the McLaren Vale winter average. Multiple rain events during spring resulted in increased disease pressure and inflorescence loss, some varieties being more affected than others.

Flowering occurred in late November and weather was mostly cool, wet, windy and cloudy adversely impacting on fruit set in across the region. With the advent of summer, rainfall stopped abruptly and conditions for December, January and February were dry and mild with only a few days above 40ºC.

The combination of late flowering and cool summer conditions resulted in a late harvest period. Once again cool wet autumn conditions combined to further slow ripening and prolong vintage.

In summary, vintage 2023 was cool and wet, harvest was later than usual, and yields were well below average. Whilst this has been a challenging season for grapegrowers and winemakers alike it has allowed their skills to shine, and we expect to see elegant wines that express terroir.

Jodie Armstrong, for McLaren Vale Grape, Wine and Tourism Association

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from McLaren Vale was 26,467 tonnes in 2023, 24 per cent below the 2022 reported crush of 34,990 tonnes and 22 per cent below the five-year average (2018–2022) of 34,037 tonnes. It was the lowest crush recorded for the region since the first SA Winegrape Crush Survey in 1993.

There were 86 respondents to the survey who reported crushing grapes from McLaren Vale in 2023, compared with a record 95 in 2022.

The total estimated value of winegrapes from McLaren Vale in 2023 was just under $45.5 million compared with just under $64 million in 2022 – a decrease of 29 per cent. The overall average value declined by 6 per cent from $1809 per tonne to $1693 per tonne.

Grenache had the highest average value at $2432 per tonne (up 6 per cent). Shiraz declined by 9 per cent to $1734 per tonne, while Cabernet Sauvignon was down 12 per cent to $1554 per tonne. These two varieties have both seen decreases of more than $400 per tonne since 2020.

The price dispersion data shows a downward shift in prices compared with last year, with 31 per cent of red grapes purchased at $2000 per tonne and above, compared with 41 per cent last year.

According to Vinehealth Australia data, the total vineyard area in McLaren Vale as at 30 April 2023 is 7375 hectares, nearly identical with the 7377 hectares in 2022. The total area is around 51 hectares more than it was 5 years ago.

There were 24 hectares of new plantings (including top-working and replacements) in the 2022-23 planting season, including 7 hectares of Grenache, 4 hectares of Sangiovese and 4 hectares of Fiano.

McLaren Vale

Winegrape intake summary table – red winegrapes

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	7	$16,286	$2,399	0%			7	$16,286
Cabernet Franc	34	$63,027	$1,872	3%	10	23%	44	$81,856
Cabernet Sauvignon	3,070	$4,766,689	$1,554	-12%	2,208	42%	5,278	$8,197,995
Durif	4				5	54%	9	$21,048
Graciano	30				18	37%	48	$108,077
Grenache	789	$1,917,666	$2,432	6%	1,031	57%	1,819	$4,424,089
Lagrein	3				1	23%	4	$7,780
Malbec	9	$17,304	$1,914	-11%	27	75%	36	$69,172
Mataro/Mourvedre	323	$617,548	$1,914	5%	277	46%	600	$1,148,478
Merlot	371	$401,846	$1,084	-14%	211	36%	582	$630,778
Montepulciano	25	$52,055	$2,049	-1%	5	16%	30	$61,746
Muscat à Petits Grains Rouges					10	100%	10	$15,137
Nebbiolo					0	100%	0	$1,266
Nero d'Avola	62	$134,750	$2,168	2%	19	23%	81	$174,986
Petit Verdot	4				76	94%	80	$130,251
Pinot Noir	253	$360,338	$1,425	6%	19	7%	272	$387,417
Sangiovese	89	$171,075	$1,930	1%	86	49%	174	$336,820
Shiraz	9,388	$16,282,298	$1,734	-9%	5,813	38%	15,201	$26,364,378
Tempranillo	88	$174,278	$1,989	-0%	114	56%	201	$400,422
Touriga Nacional	30	$64,311	$2,134	-5%	55	65%	85	$181,526
Other red	56	$104,256	$1,846	-7%	144	72%	200	$363,075
Red Total	**14,634**	**$25,234,116**	**$1,725**	**-8%**	**10,128**	**41%**	**24,762**	**$43,122,583**

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

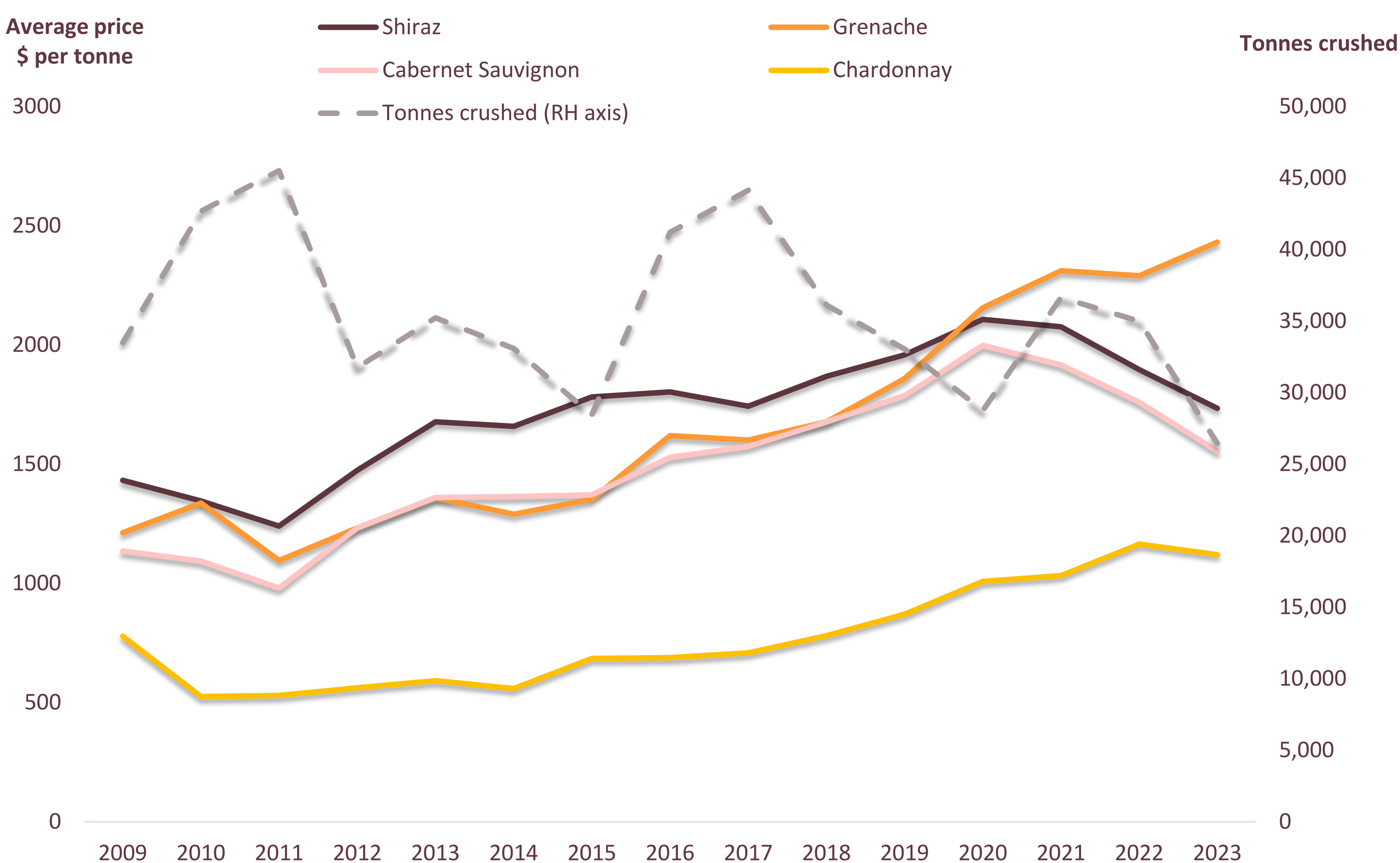
Winegrape intake summary table – white winegrapes

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	704	$788,422	$1,120	-4%	96	12%	800	$896,472
Chenin blanc	17	$37,240	$2,239	52%	7	30%	24	$53,520
Fiano	51	$92,573	$1,819	-7%	95	65%	146	$265,734
Marsanne	28				23	45%	52	$82,768
Muscat à Petits Grains Blancs	12	$16,831	$1,380	13%	5	31%	18	$24,240
Muscat Gordo Blanco					5	100%	5	$6,022
Pinot Gris/Grigio					97	100%	97	$137,919
Riesling	101	$137,663	$1,357	-6%	5	5%	107	$144,694
Roussanne					25	100%	25	$51,456
Sauvignon Blanc	35	$51,502	$1,461	-9%	65	65%	100	$145,938
Semillon	0				46	99%	46	$69,585
Verdelho	58	$67,162	$1,164	3%	7	11%	65	$75,519
Vermentino	26	$49,509	$1,940	-5%	28	53%	54	$104,314
Viognier	42	$65,073	$1,545	-2%	79	65%	122	$187,681
Other white	18	$38,552	$2,150	8%	28	61%	46	$81,038
White Total	**1,092**	**$1,390,448**	**$1,273**	**0%**	**613**	**36%**	**1,705**	**$2,326,901**
Grand Total	**15,726**	**$26,624,564**	**$1,693**	**-6%**	**10,741**	**41%**	**26,467**	**$45,449,484**

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 (red)

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Barbera					7	7
Cabernet Franc			18	3	14	34
Cabernet Sauvignon	28	44	1,415	1,050	533	3,070
Durif					4	4
Graciano					30	30
Grenache			22	125	641	789
Lagrein					3	3
Malbec				4	5	9
Mataro/Mourvedre		3	41	180	99	323
Merlot		151	177	40	3	371
Montepulciano				6	19	25
Nero d'Avola					62	62
Petit Verdot				4		4
Pinot Noir			154	89	9	253
Sangiovese				57	32	89
Shiraz	175	229	3,292	2,710	2,982	9,388
Tempranillo				40	48	88
Touriga Nacional				8	22	30
Other red			10	8	38	56
Red Total	**202**	**427**	**5,129**	**4,324**	**4,551**	**14,633**

McLaren Vale

Price dispersion – purchased grapes (white)

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
White						
Chardonnay		16	602	52	33	704
Chenin blanc			2		14	17
Fiano				25	26	51
Marsanne				28		28
Muscat à Petits Grains Blancs			10	2		12
Riesling	9		45	47		101
Sauvignon Blanc			30		6	35
Semillon				0		0
Verdelho			46	11		58
Vermentino				10	15	26
Viognier		7		35		42
Other white				2	16	18
White Total	**9**	**23**	**736**	**213**	**111**	**1,092**
Total purchased	**212**	**450**	**5,865**	**4,537**	**4,662**	**15,726**

McLaren Vale

Current plantings by variety and year planted - reds

	Area (hectares)					
Variety	Pre-2020	2020	2021	2022	Total area (Ha)	% planted in 2022
Red winegrapes						
Aglianico	5	0	1	1	7	14%
Barbera	12	0	0	0	12	0%
Cabernet Franc	22	0	0	0	22	0%
Cabernet Sauvignon	1,298	27	0	0	1,325	0%
Carignan	6	0	0	0	6	0%
Cinsault	3	0	0	0	3	0%
Durif	5	0	0	0	5	0%
Graciano	5	1	0	0	6	0%
Grenache	457	11	11	7	486	1%
Malbec	13	0	0	0	13	0%
Mataro (Mourvedre)	92	0	1	1	94	1%
Mencia	6	1	0	0	7	0%
Merlot	182	0	0	0	182	0%
Montepulciano	19	0	0	1	20	5%
Nebbiolo	2	0	0	0	2	0%
Nero D'Avola	25	0	2	2	29	7%
Petit Verdot	44	0	0	0	44	0%
Pinot Noir	46	0	0	0	46	0%
Sagrantino	7	0	0	0	7	0%
Sangiovese	41	0	0	4	45	9%
Saperavi	3	0	0	0	3	0%
Shiraz	4,113	67	12	1	4,193	0%
Tempranillo	65	4	3	1	73	1%
Touriga	21	0	0	0	21	0%
Zinfandel	4	0	0	0	4	0%
Other Red	28	0	0	0	28	0%
Total red varieties	**6,524**	**111**	**30**	**18**	**6,683**	**0%**

Source: Vinehealth Australia

McLaren Vale

Current plantings by variety and year planted - whites

	Area (hectares)					
Variety	**Pre-2020**	**2020**	**2021**	**2022**	**Total area (Ha)**	**% planted in 2022**
White winegrapes						
Chardonnay	264	0	0	0	264	0%
Chenin Blanc	14	0	0	0	14	0%
Fiano	29	4	8	4	45	9%
Grenache Blanc	2	0	0	0	2	0%
Muscat A Petit Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris	23	0	3	0	26	0%
Riesling	27	0	0	0	27	0%
Roussanne	12	0	0	0	12	0%
Sauvignon Blanc	39	0	0	0	39	0%
Semillon	16	0	0	0	16	0%
Verdelho	15	0	0	0	15	0%
Vermentino	5	1	0	0	6	0%
Viognier	49	0	0	0	49	0%
Other White	26	0	1	2	29	7%
Total white varieties	**531**	**5**	**12**	**6**	**554**	**1%**
Rootstock Block	4	0	0	0	4	0%
Unknown variety	134	0	0	0	134	0%
Total all varieties	**7,193**	**116**	**42**	**24**	**7,375**	**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 91 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 2023).

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

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.
- Planting data tables are current as at 30 April 2023 and include all plantings from the 2022–23 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 wine sector National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association and the Wine Grape Council 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

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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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