



# SA Winegrape Crush Survey 2025

## Regional Summary Report

### McLaren Vale Wine Region

*Wine Australia July 2025*

DATUM: GDA2020  
PROJECTION: SA Lambert  
DATE: 15<sup>th</sup> February 2023  
SOFTWARE: ESRI ArcGIS v10.7.1  
DATA SOURCE:  
Vineyard Block - Vinehealth Australia  
Wine Region - Wine Australia

**McLaren Vale  
Wine Region**



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# McLaren Vale

## Vintage overview

### VINTAGE REPORT

One of intensity and vibrancy, the 2025 vintage was shaped by a warm, dry growing season in the McLaren Vale wine region – blending exceptional fruit quality with resilience.

Warmer than average maximum daily temperatures resulted in early bud burst, arriving nearly two weeks ahead of the long-term average. Warm, dry and calm conditions allowed for a short flowering period and even fruit set. Dry conditions minimised disease pressure allowing for healthy vine growth.

Consistently warm weather conditions encouraged an early veraison and start to vintage. The warm, dry conditions also led to slightly smaller berries with remarkable concentration – a hallmark of the 2025 vintage.

Harvest in the McLaren Vale wine region commenced at the end of January, continuing the trend of an early season – nearly two weeks ahead of schedule. A four-day heatwave in early February tested conditions, yet the fruit held up exceptionally well, reflecting both the resilience of the region's vineyards and the expertise of its growers. The early and compacted harvest concluded by the end of March.

While it was warmer than average, there were no damaging heatwaves, and peak maximum temperatures were similar to a "typical" summer.

Despite the dry weather, fruit showed excellent balance, flavour development, and structure, leading to high-quality outcomes in the winery.

Winemakers across McLaren Vale wine region are enthusiastic about the quality of Vintage 2025. Consistent ripening conditions produced wines of depth, concentration, vibrancy and fine natural tannin.

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

### OVERVIEW OF VINTAGE STATISTICS

The reported crush of McLaren Vale winegrapes in 2025 was 36,104 tonnes, up by 28 per cent compared with the prior year's crush. Over the past five years, the average reported crush for the McLaren Vale has been 31,146 tonnes, making this year's crush 16 per cent above the five-year (2020–2024) average.

There were a record 112 respondents to the survey who reported crushing grapes from McLaren Vale in 2025, compared with 98 in 2024.

The total value of winegrapes in 2025 was \$58 million, compared with \$46 million in 2024, an increase of 25 per cent. The overall average value declined by 1 per cent from \$1,593 in 2024 to \$1,571 per tonne.

Of the major varieties, Grenache had the highest average value at \$2,138 per tonne despite decreasing by 1 per cent. The largest variety, Shiraz also declined in average purchase value – down by 3 per cent to \$1,538 per tonne. On the other hand, Cabernet Sauvignon has started to see an increase (up 9 per cent) to \$1,647 per tonne after being in decline since 2020.

The price dispersion data shows an upward shift, with 54 per cent of all grapes being purchased at \$1,500 per tonne or above compared with 51 per cent in 2024.

According to Vinehealth Australia data, the total vineyard area in the McLaren Vale as at 30 April 2025 was 7,335 hectares, a net decrease of 48 hectares compared with the previous year and 79 hectares less than it was in 2021.

There were 20 hectares of new plantings (including top-working and replacements) in the 2024–25 season, split almost evenly between red and white varieties. The most new plantings over the past three years have been in Grenache and 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 |
|-------------------------------|------------------|-----------------------|----------------------------------|------------------------------|-----------------------------|-----------------------------|------------------------|----------------------------------|
| <b>Red</b>                    |                  |                       |                                  |                              |                             |                             |                        |                                  |
| Barbera                       | 8                |                       |                                  |                              |                             |                             | 8                      | \$16,018                         |
| Cabernet Franc                | 15               | \$38,010              | \$2,558                          | 10%                          | 5                           | 24%                         | 20                     | \$50,074                         |
| Cabernet Sauvignon            | 3,212            | \$5,289,238           | \$1,647                          | 9%                           | 3,221                       | 50%                         | 6,433                  | \$10,593,423                     |
| Durif                         | 15               |                       |                                  |                              | 4                           | 21%                         | 19                     | \$50,246                         |
| Graciano                      | 35               | \$77,332              | \$2,181                          | -0%                          | 15                          | 29%                         | 50                     | \$109,545                        |
| Grenache                      | 1,117            | \$2,388,942           | \$2,138                          | -1%                          | 1,310                       | 54%                         | 2,428                  | \$5,190,033                      |
| Malbec                        | 9                |                       |                                  |                              | 11                          | 57%                         | 20                     | \$40,204                         |
| Mataro/Mourvedre              | 367              | \$851,557             | \$2,318                          | 8%                           | 259                         | 41%                         | 627                    | \$1,453,108                      |
| Merlot                        | 267              | \$264,888             | \$992                            | -4%                          | 198                         | 43%                         | 465                    | \$461,596                        |
| Montepulciano                 | 19               | \$39,495              | \$2,039                          | 9%                           | 27                          | 58%                         | 46                     | \$94,078                         |
| Muscat à Petits Grains Rouges | 22               |                       |                                  |                              | 15                          | 40%                         | 37                     | \$53,266                         |
| Nebbiolo                      |                  |                       |                                  |                              | 1                           | 100%                        | 1                      | \$3,318                          |
| Nero d'Avola                  | 52               | \$92,205              | \$1,770                          | -9%                          | 91                          | 64%                         | 143                    | \$252,899                        |
| Petit Verdot                  | 19               |                       |                                  |                              | 83                          | 81%                         | 102                    | \$86,463                         |
| Pinot Noir                    | 431              | \$482,684             | \$1,120                          | -20%                         | 40                          | 9%                          | 471                    | \$520,765                        |
| Sangiovese                    | 276              | \$498,688             | \$1,808                          | -7%                          | 163                         | 37%                         | 439                    | \$793,579                        |
| Shiraz                        | 13,667           | \$21,015,904          | \$1,538                          | -3%                          | 7,169                       | 34%                         | 20,837                 | \$32,041,864                     |
| Tempranillo                   | 204              | \$419,769             | \$2,054                          | 9%                           | 138                         | 40%                         | 343                    | \$703,631                        |
| Touriga Nacional              | 93               | \$173,447             | \$1,874                          | -8%                          | 109                         | 54%                         | 201                    | \$377,073                        |
| Other red                     | 75               | \$148,092             | \$1,975                          | 5%                           | 186                         | 71%                         | 261                    | \$498,500                        |
| <b>Red Total</b>              | <b>19,905</b>    | <b>\$31,901,834</b>   | <b>\$1,603</b>                   | <b>-1%</b>                   | <b>13,046</b>               | <b>40%</b>                  | <b>32,950</b>          | <b>\$53,389,684</b>              |

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

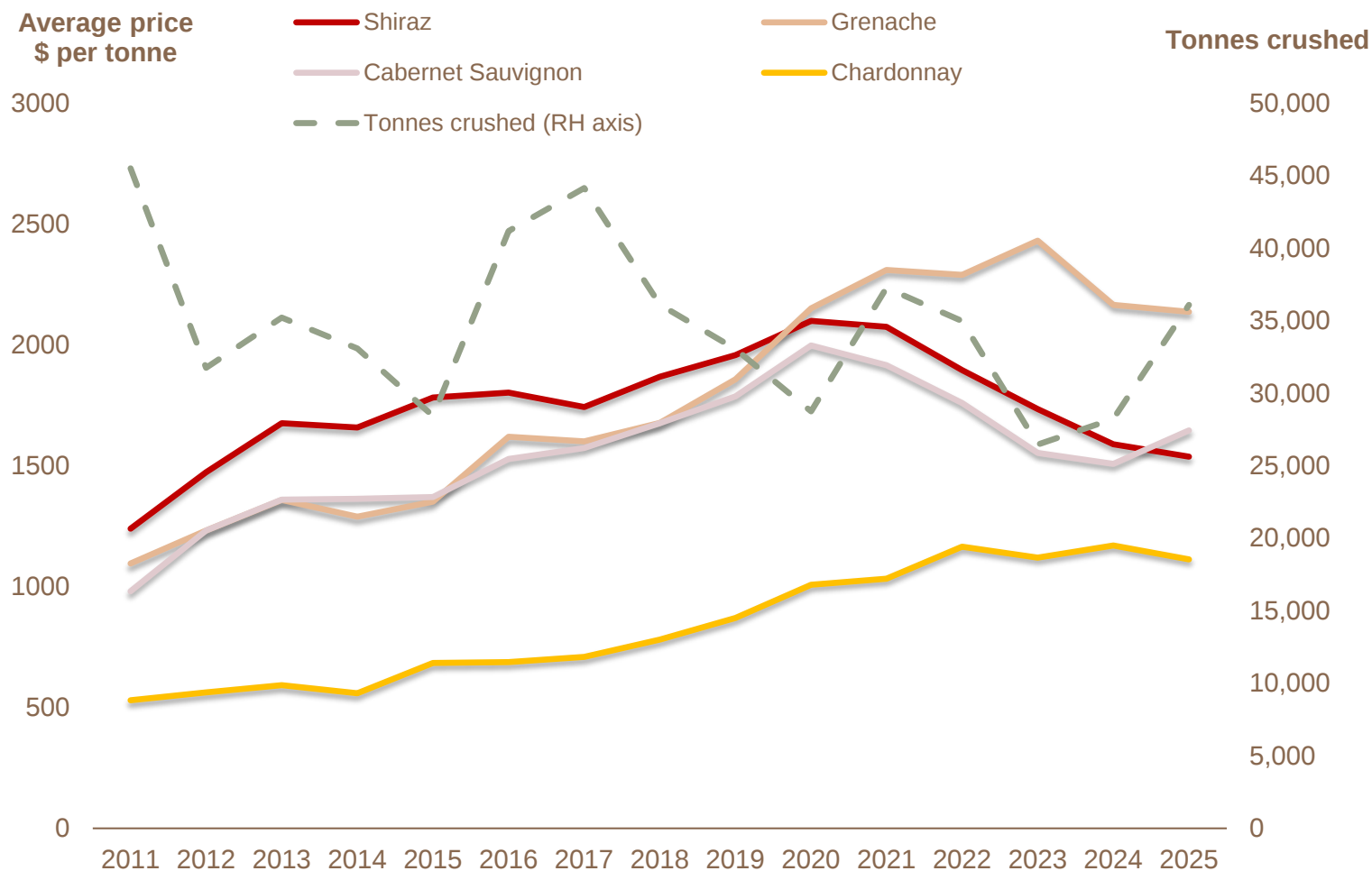
## Winegrape intake summary table – white winegrapes

| 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 |
|-------------------------------|------------------|-----------------------|----------------------------------|------------------------------|-----------------------------|-----------------------------|------------------------|----------------------------------|
| <b>White</b>                  |                  |                       |                                  |                              |                             |                             |                        |                                  |
| Chardonnay                    | 1,396            | \$1,553,521           | \$1,113                          | -5%                          | 138                         | 9%                          | 1,535                  | \$1,703,422                      |
| Chenin Blanc                  | 41               | \$63,049              | \$1,527                          | -3%                          | 33                          | 45%                         | 74                     | \$113,745                        |
| Fiano                         | 217              | \$424,967             | \$1,954                          | 17%                          | 203                         | 48%                         | 420                    | \$820,836                        |
| Marsanne                      | 32               |                       |                                  |                              | 43                          | 58%                         | 75                     | \$104,356                        |
| Muscat à Petits Grains Blancs | 21               | \$24,010              | \$1,144                          | 0%                           | 14                          | 39%                         | 35                     | \$39,681                         |
| Muscat Gordo Blanco           | 13               |                       |                                  |                              |                             |                             | 13                     | \$12,550                         |
| Pinot Gris/Grigio             |                  |                       |                                  |                              | 122                         | 100%                        | 122                    | \$173,712                        |
| Prosecco                      | 43               |                       |                                  |                              |                             |                             | 43                     | \$72,615                         |
| Riesling                      | 69               |                       |                                  |                              | 9                           | 11%                         | 77                     | \$104,197                        |
| Roussanne                     |                  |                       |                                  |                              | 30                          | 100%                        | 30                     | \$38,888                         |
| Sauvignon Blanc               | 55               | \$68,806              | \$1,255                          | -42%                         | 89                          | 62%                         | 143                    | \$179,955                        |
| Semillon                      |                  |                       |                                  |                              | 45                          | 100%                        | 45                     | \$56,118                         |
| Verdelho                      | 79               |                       |                                  |                              | 69                          | 47%                         | 147                    | \$197,068                        |
| Vermentino                    | 39               | \$72,362              | \$1,848                          | -6%                          | 46                          | 54%                         | 85                     | \$157,381                        |
| Viognier                      | 91               | \$121,321             | \$1,327                          | 0%                           | 82                          | 47%                         | 174                    | \$230,421                        |
| Other white                   | 55               | \$93,033              | \$1,689                          | -9%                          | 82                          | 60%                         | 137                    | \$242,193                        |
| <b>White Total</b>            | <b>2,151</b>     | <b>\$2,747,904</b>    | <b>\$1,278</b>                   | <b>-1%</b>                   | <b>1,004</b>                | <b>32%</b>                  | <b>3,154</b>           | <b>\$4,247,136</b>               |
| <b>Grand Total</b>            | <b>22,055</b>    | <b>\$34,649,738</b>   | <b>\$1,571</b>                   | <b>-1%</b>                   | <b>14,049</b>               | <b>39%</b>                  | <b>36,104</b>          | <b>\$57,636,821</b>              |

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                          |        |              |               |                | 8       | 8               |
| Cabernet Franc                   |        |              |               | 4              | 11      | 15              |
| Cabernet Sauvignon               | 43     | 18           | 989           | 1,348          | 813     | 3,212           |
| Durif                            |        |              | 3             |                | 12      | 15              |
| Graciano                         |        |              |               | 2              | 34      | 35              |
| Grenache                         | 30     | 30           | 124           | 314            | 617     | 1,115           |
| Malbec                           |        |              |               |                | 9       | 9               |
| Mataro/Mourvedre                 |        |              | 10            | 138            | 219     | 367             |
| Merlot                           | 24     | 62           | 152           | 28             |         | 265             |
| Montepulciano                    |        |              |               | 3              | 17      | 19              |
| Muscat à Petits Grains Rouges    |        |              | 5             | 17             |         | 22              |
| Nero d'Avola                     |        | 6            | 6             | 10             | 30      | 52              |
| Petit Verdot                     | 11     |              | 8             |                |         | 19              |
| Pinot Noir                       | 32     | 62           | 295           |                | 42      | 431             |
| Sangiovese                       |        |              | 10            | 207            | 59      | 276             |
| Shiraz                           | 1,900  | 735          | 4,001         | 3,984          | 3,042   | 13,663          |
| Tempranillo                      |        |              |               | 53             | 151     | 204             |
| Touriga Nacional                 |        |              | 1             | 35             | 56      | 93              |
| Other red                        |        |              |               | 28             | 47      | 75              |
| Red Total                        | 2,041  | 913          | 5,606         | 6,172          | 5,165   | 19,896          |

# McLaren Vale

## Price dispersion – purchased grapes (white)

| Varieties                     | Tonnes purchased in each segment |              |               |                |              | Total purchased |
|-------------------------------|----------------------------------|--------------|---------------|----------------|--------------|-----------------|
|                               | <\$600                           | \$600-<\$900 | \$900-<\$1500 | \$1500-<\$2000 | >\$2000      |                 |
| <b>White</b>                  |                                  |              |               |                |              |                 |
| Chardonnay                    | 44                               | 43           | 1,247         | 62             |              | 1,396           |
| Chenin Blanc                  |                                  |              | 9             | 28             | 5            | 41              |
| Fiano                         |                                  |              |               | 97             | 121          | 217             |
| Marsanne                      |                                  |              | 32            |                |              | 32              |
| Muscat à Petits Grains Blancs |                                  |              | 16            | 5              |              | 21              |
| Muscat Gordo Blanco           |                                  |              | 13            |                |              | 13              |
| Prosecco                      |                                  |              |               | 32             | 11           | 43              |
| Riesling                      |                                  |              | 42            | 26             |              | 69              |
| Sauvignon Blanc               |                                  | 12           | 31            | 12             |              | 55              |
| Verdelho                      |                                  |              | 70            |                | 9            | 79              |
| Vernmentino                   |                                  |              |               | 32             | 7            | 39              |
| Viognier                      |                                  | 16           | 63            | 12             |              | 91              |
| Other white                   |                                  |              | 24            | 15             | 15           | 54              |
| <b>White Total</b>            | <b>44</b>                        | <b>72</b>    | <b>1,546</b>  | <b>321</b>     | <b>167</b>   | <b>2,150</b>    |
| <b>Total purchased</b>        | <b>2,085</b>                     | <b>984</b>   | <b>7,152</b>  | <b>6,492</b>   | <b>5,332</b> | <b>22,046</b>   |

# McLaren Vale

## Current plantings by variety and year planted - reds

| Variety                     | Area (hectares) |           |           |           | Total area (Ha) | % planted in 2024 |
|-----------------------------|-----------------|-----------|-----------|-----------|-----------------|-------------------|
|                             | Pre-2022        | 2022      | 2023      | 2024      |                 |                   |
| <b>Red Winegrapes</b>       |                 |           |           |           |                 |                   |
| Aglianico                   | 3               |           | 2         |           | 5               |                   |
| Barbera                     | 11              |           |           |           | 11              |                   |
| Cabernet Franc              | 18              |           |           |           | 18              |                   |
| Cabernet Sauvignon          | 1,278           |           |           | 3         | 1,280           | 0%                |
| Carignan                    | 6               |           |           |           | 6               |                   |
| Cinsault                    | 3               | 1         | 1         |           | 5               |                   |
| Durif (Petite Sirah)        | 5               |           |           |           | 5               |                   |
| Graciano                    | 8               |           |           |           | 8               |                   |
| Grenache                    | 497             | 14        | 18        | 1         | 530             | 0%                |
| Malbec                      | 12              |           |           |           | 12              |                   |
| Mataro (Mourvedre)          | 97              | 1         |           |           | 98              |                   |
| Mencia                      | 6               | 1         |           |           | 7               |                   |
| Merlot                      | 166             |           |           |           | 166             |                   |
| Montepulciano               | 18              |           | 1         |           | 19              |                   |
| Nero d'Avola                | 26              | 3         | 3         | 1         | 33              | 3%                |
| Other Red                   | 28              |           | 0         |           | 28              |                   |
| Petit Verdot                | 35              |           |           |           | 35              |                   |
| Pinot Noir                  | 42              |           | 2         |           | 45              |                   |
| Sagrantino                  | 5               |           |           |           | 5               |                   |
| Sangiovese                  | 43              | 7         | 4         | 1         | 55              | 2%                |
| Saperavi                    | 3               |           | 2         |           | 5               |                   |
| Shiraz                      | 4,122           | 4         |           | 3         | 4,130           | 0%                |
| Tempranillo                 | 73              | 1         | 1         | 2         | 77              | 3%                |
| Touriga                     | 22              |           |           |           | 22              |                   |
| Zinfandel                   | 3               |           |           |           | 3               |                   |
| <b>Red Winegrapes Total</b> | <b>6,532</b>    | <b>31</b> | <b>33</b> | <b>11</b> | <b>6,607</b>    | <b>0%</b>         |

Source:  
Vinehealth  
Australia

# McLaren Vale

Current plantings by variety and year planted – whites and others

| Variety                                        | Area (hectares) |           |           |           | Total area (Ha) | % planted in 2024 |
|------------------------------------------------|-----------------|-----------|-----------|-----------|-----------------|-------------------|
|                                                | Pre-2022        | 2022      | 2023      | 2024      |                 |                   |
| <b>White Winegrapes</b>                        |                 |           |           |           |                 |                   |
| Chardonnay                                     | 236             |           |           | 2         | 238             | 1%                |
| Chenin Blanc                                   | 13              | 1         |           | 1         | 15              | 7%                |
| Fiano                                          | 48              | 16        | 11        | 1         | 76              | 1%                |
| Grenache Blanc                                 | 3               |           | 1         | 3         | 7               | 43%               |
| Grenache Gris                                  | 2               |           |           | 1         | 2               | 50%               |
| Muscat A Petit Grains Blanc (White Frontignac) | 9               |           |           |           | 9               |                   |
| Other White                                    | 30              | 2         | 3         | 2         | 36              | 6%                |
| Pinot Gris                                     | 24              |           |           |           | 24              |                   |
| Riesling                                       | 26              |           |           |           | 26              |                   |
| Roussanne                                      | 12              | 0         | 0         |           | 12              |                   |
| Sauvignon Blanc                                | 34              |           |           |           | 34              |                   |
| Semillon                                       | 15              |           |           |           | 15              |                   |
| Verdelho                                       | 13              |           |           |           | 13              |                   |
| Vermentino                                     | 5               |           | 1         |           | 7               |                   |
| Viognier                                       | 44              |           |           |           | 44              |                   |
| <b>White Winegrapes Total</b>                  | <b>514</b>      | <b>19</b> | <b>16</b> | <b>10</b> | <b>559</b>      | <b>2%</b>         |
| Multi-purpose white                            | 0               |           |           |           | 0               |                   |
| Rootstock                                      | 4               |           |           |           | 4               |                   |
| Table red                                      | 0               |           |           |           | 0               |                   |
| Unknown variety                                | 165             |           |           |           | 165             |                   |
| <b>Grand Total</b>                             | <b>7,216</b>    | <b>50</b> | <b>49</b> | <b>20</b> | <b>7,335</b>    | <b>0%</b>         |

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 reported to have been 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 in 2025 is 92 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, leased or associated vineyards ("own grown") and fruit purchased from other grape producers ("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 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 2025).

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 (price dispersion), differences in quality 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 2025 and include all plantings from the 2024–25 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.
- Zeros (0) in the planting tables indicate a planting of less than 0.5 ha.
- The totals by year planted may not align with the total areas, as new plantings without a year are not captured.
- Rounding of individual variety areas may produce slight discrepancies in total areas in the planting tables.



# 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 Wine Grape Council SA.

The survey publication is available on the Vinehealth Australia website [vinehealth.com.au](http://vinehealth.com.au) and via links from the Wine Grape Council SA website [wgcsa.com.au](http://wgcsa.com.au) and the South Australian Wine Industry Association website [www.winesa.asn.au](http://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>

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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 and innovation, 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 research development and adoption investments.

## Credits

Image (Eden Valley vineyard) – Wine Australia

GI maps – Vinehealth Australia

