

SA Winegrape Crush Survey 2021

Regional Summary Report

McLaren Vale Wine Region

Wine Australia July 2021



Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCan, Esri Japan, METI, Esri China (Hong Kong), Esri Korea, Esri (Thailand), NGCC, (c) OpenStreetMap contributors, and the GIS User Community

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PROJECTION: SA Lambert
DATE: 28 November 2019
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

The local wine community is heralding Vintage 2021 as one of the best of the century. Vineyards in the McLaren Vale Wine Region were generally more productive, producing higher yields at harvest, compared to recent seasons. Importantly the increase in vine yields was combined with excellent quality which was well received by the region's winemakers.

Overall, the season was average for rainfall, but rain fell primarily early in the growing season well before there was ripening fruit which can be damaged by wet weather. The weather was also warmer than average for both daytime and night-time temperatures.

November 2020 was the driest since 1990 and was a definite hard end to Spring. November also proved to have the equal highest average daily maximum temperature for the growing season (27.5°C tied with January). This is a rare occurrence. One of the warmest days for the season was on November 27th which was 38.8°C.

There was mild weather through December. There were only two days above 35°C. January was slightly hotter but still below average. The temperatures in February were ideal with no days above 35°C and temperatures staying around the high 20s and low 30s each day.

Veraison in red grapes and softening in whites was later than typical, early February, and ripening was steady. There were a few rain events of 10-20mm during ripening, but this had only a minor effect on harvest.

It was a long, drawn out vintage compared to what has been the recent experience. Grape picking took 8 weeks to complete starting at full pace in the first week of March and ending in the second week of April. The reports from winemakers on wine quality has been good, with winemaking made easier by cool weather and gentle ripening.

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

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from McLaren Vale was 36,659 tonnes in 2021, up by 28 per cent compared with the 2020 reported crush of 28,751 tonnes. The crush was almost identical to the five-year average (2016–2020) of 36,653 tonnes. McLaren Vale slipped from third-largest to sixth-largest region by reported crush size in 2021 as other regions had larger yield increases.

There were 85 respondents to the survey who reported crushing grapes from McLaren Vale in 2021, the same number as last year. 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 2021 was just under \$72 million compared with \$56 million in 2020. There was virtually no overall change in the average value, which was \$1946 per tonne in 2021, compared with \$1951 per tonne in 2020.

There were small decreases in average value for Shiraz (down 1 per cent to \$2076 per tonne) and Cabernet Sauvignon (down 4 per cent to \$1916 per tonne) while Grenache increased by 7 per cent to \$2311 and Chardonnay increased by 3 per cent to \$1033 per tonne. Grenache consolidated its position as the highest value variety in McLaren Vale.

The price dispersion data shows a similar distribution to last year, with 46 per cent of red grapes purchased at \$2000 per tonne and above, compared with 44 per cent last year.

According to Vinehealth Australia data, the total vineyard area in McLaren Vale as at 30 April 2021 is 7414 hectares, compared with 7349 hectares in 2019. The total area is around 50 hectares more than it was 5 years ago.

There were 85 hectares of new plantings (including top-working and replacements) in the 2020-21 planting season, the majority being Shiraz.

McLaren Vale

Winegrape intake summary table – reds

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	% change in average value	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Total value all grapes
Red								
Barbera	3				5	60%	8	\$12,750
Cabernet Franc	44	\$58,701	\$1,349	-24%	12	22%	56	\$75,551
Cabernet Sauvignon	3,260	\$6,247,704	\$1,916	-4%	2,574	44%	5,834	\$11,179,550
Durif	15	\$21,534	\$1,475	-21%	9	37%	23	\$34,145
Graciano	16	\$35,727	\$2,205	13%	36	69%	52	\$114,315
Grenache	1,126	\$2,600,886	\$2,311	7%	916	45%	2,042	\$4,718,186
Lagrein					5	100%	5	\$6,615
Malbec	11	\$19,618	\$1,827	-2%	12	52%	23	\$41,297
Mataro/Mourvedre	457	\$815,420	\$1,784	-5%	196	30%	653	\$1,165,344
Merlot	569	\$714,857	\$1,256	5%	427	43%	996	\$1,251,439
Montepulciano	19	\$32,446	\$1,693	-5%	17	46%	36	\$60,382
Nebbiolo	0				6	94%	6	\$19,200
Nero d'Avola	30	\$68,165	\$2,298	-6%	53	64%	83	\$189,908
Petit Verdot	60	\$71,210	\$1,187	22%	202	77%	262	\$311,156
Pinot Noir	266	\$319,225	\$1,198	3%			266	\$319,225
Sangiovese	244	\$399,339	\$1,639	-6%	169	41%	413	\$676,849
Shiraz	14,103	\$29,273,883	\$2,076	-1%	8,718	38%	22,821	\$47,369,092
Tempranillo	184	\$354,071	\$1,922	5%	135	42%	320	\$613,833
Touriga Nacional	29	\$59,508	\$2,086	0%	71	71%	100	\$208,540
Other red	96	\$188,489	\$1,966	1%	223	70%	318	\$582,592
Red Total	20,532	\$41,287,084	\$2,011	-1%	13,785	40%	34,317	\$68,949,970

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

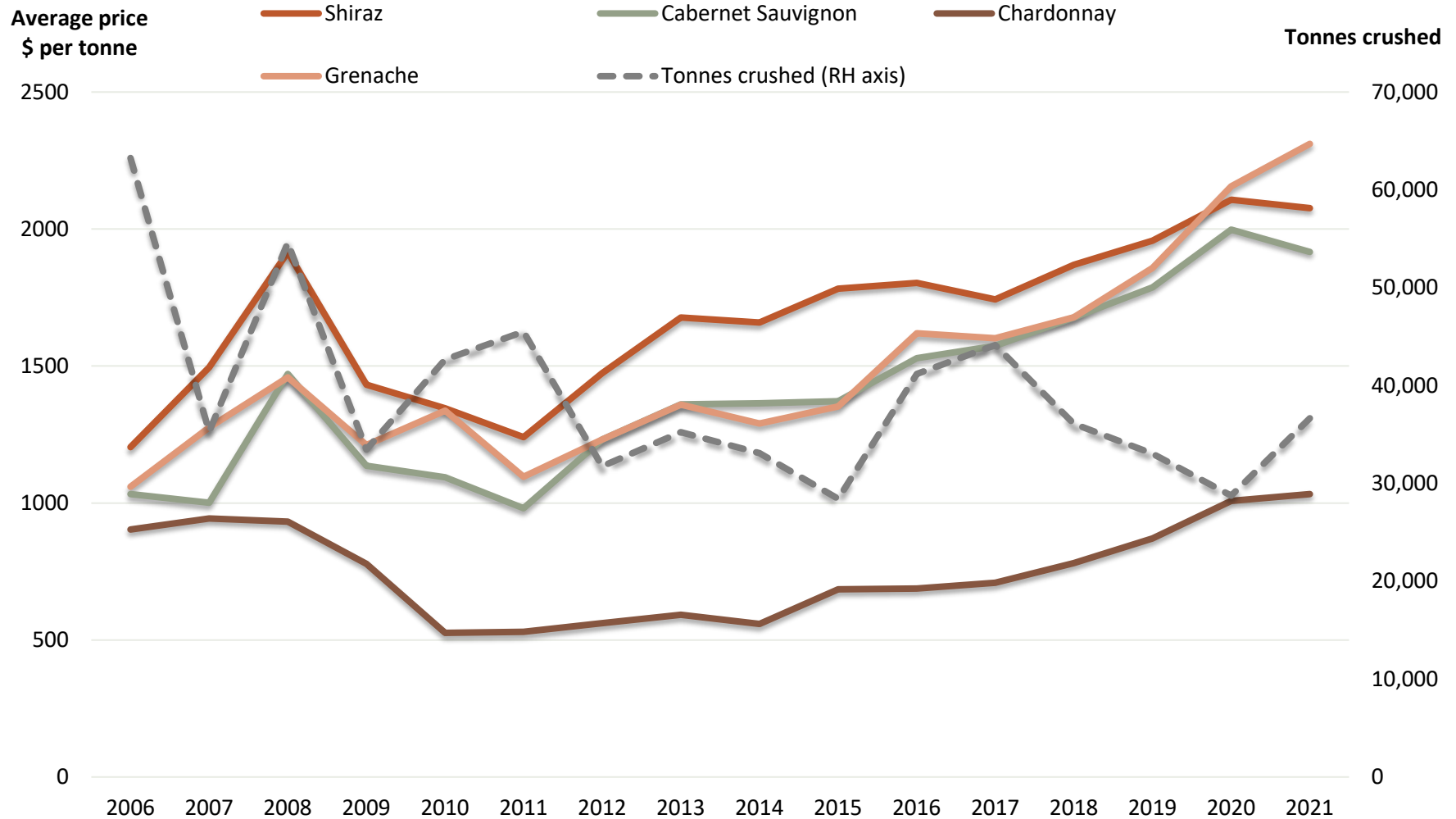
Winegrape intake summary table – whites

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	% change in average value	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Total value all grapes
White								
Chardonnay	1,070	\$1,105,490	\$1,033	3%	149	12%	1,219	\$1,259,448
Chenin blanc	95	\$143,300	\$1,501	0%	33	26%	128	\$192,714
Fiano	23	\$43,464	\$1,865	14%	119	84%	142	\$265,101
Marsanne	57				56	49%	114	\$182,201
Muscat à petits grains blancs	36				9	19%	44	\$54,320
Muscat Gordo Blanco					3	100%	3	\$3,440
Pinot Gris/Grigio					96	100%	96	\$121,106
Prosecco	8				15	65%	23	\$36,175
Riesling	102	\$132,159	\$1,294	5%			102	\$132,159
Roussanne	18				32	65%	49	\$49,390
Sauvignon Blanc	21	\$23,584	\$1,099	-3%	27	56%	49	\$53,300
Verdelho	105				4	3%	109	\$103,058
Vermentino	31	\$66,690	\$2,185	-22%	38	55%	68	\$149,440
Viognier	99	\$151,192	\$1,527	10%	58	37%	157	\$239,247
Other white	12				27	70%	38	\$50,105
White Total	1,678	\$1,949,580	\$1,162	3%	664	28%	2,342	\$2,891,203
Grand Total	22,209	\$43,236,664	\$1,946	-0%	14,449	39%	36,659	\$71,841,173

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)

Varieties	Tonnes purchased in each price segment					Total tonnes purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera				3		3
Cabernet Franc	17			16	10	44
Cabernet Sauvignon	14	48	269	1,751	1,177	3,260
Durif	2		8	3	2	15
Graciano					15	15
Grenache	2	5	46	174	894	1,120
Malbec				11		11
Mataro/Mourvedre			10	330	117	457
Merlot	12	10	436	107	4	569
Montepulciano				19		19
Nebbiolo					0	0
Nero d'Avola					30	30
Petit Verdot			45	13	2	60
Pinot Noir			240	21	5	266
Sangiovese			108	102	35	244
Shiraz	79	59	676	5,496	7,744	14,054
Tempranillo				93	91	184
Touriga Nacional				6	23	29
Other red				27	69	96
Red Total	126	123	1,838	8,172	10,217	20,476

McLaren Vale

Price dispersion – purchased grapes (whites)

Varieties	Tonnes purchased in each price segment					Total tonnes purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
White						
Chardonnay	34	453	397	186		1,070
Chenin blanc			4	91		95
Fiano				11	13	23
Marsanne				57		57
Muscat à petits grains blancs			34	1		36
Prosecco			3	5		8
Riesling		11	42	49		102
Roussanne			18			18
Sauvignon Blanc			21			21
Verdelho		82	23			105
Vermentino				18	13	31
Viognier		16		83	0	99
Other white				11	1	12
White Total	34	562	543	513	26	1,678
Total purchased	160	685	2,381	8,685	10,242	22,153

McLaren Vale

Current plantings by variety and year planted – reds

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
Red winegrapes						
Barbera	11	0	0	0	11	0%
Cabernet Franc	22	0	0	0	22	0%
Cabernet Sauvignon	1,328	12	13	19	1,372	1%
Carignan	4	1	0	0	5	0%
Cinsault	3	0	0	0	3	0%
Durif (Petite Sirah)	5	0	0	0	5	0%
Graciano	5	0	0	1	6	17%
Grenache	450	4	2	8	464	2%
Malbec	11	1	0	0	12	0%
Mataro (Mourvedre)	91	0	0	0	91	0%
Merlot	186	0	0	0	186	0%
Montepulciano	15	2	2	0	19	0%
Nero d'Avola	19	0	2	0	21	0%
Other Red	37	1	0	0	38	1%
Petit Verdot	45	0	0	0	45	0%
Pinot Noir	46	0	0	0	46	0%
Sagrantino	7	0	0	0	7	0%
Sangiovese	40	0	0	0	40	0%
Shiraz	4,062	57	31	49	4,199	1%
Tempranillo	64	0	0	2	66	3%
Touriga	17	0	1	0	18	0%
Zinfandel	4	0	0	0	4	0%
Total red varieties	6,472	78	51	79	6,680	1%

Source:
Vinehealth
Australia

McLaren Vale

Current plantings by variety and year planted – whites

Variety	Pre-2018	2018	2019	2020	Total area	% planted in 2020
White winegrapes						
Aglianico	3	0	1	1	5	20%
Chardonnay	274	2	0	0	276	0%
Chenin Blanc	15	0	0	0	15	0%
Fiano	20	0	8	4	32	13%
Muscat A Petit Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris	23	0	0	0	23	0%
Riesling	31	0	0	0	31	0%
Rousanne	12	0	0	0	12	0%
Sauvignon Blanc	45	0	0	0	45	0%
Semillon	17	0	0	0	17	0%
Verdelho	14	0	0	0	14	0%
Vermentino	4	0	0	1	5	20%
Viognier	50	0	0	0	50	0%
Other White	27	0	0	0	27	0%
Total white varieties	545	2	9	6	562	1%
Rootstock Block	4	0	0	0	4	0%
Multi-purpose white	3	0	0	0	3	0%
Table red	0	0	0	0	0	0%
Table white	0	0	0	0	0	0%
Unknown variety	165	0	0	0	165	0%
Total all varieties	7,189	80	60	85	7,414	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 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 2021).

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 not collected by the Australian National Vintage 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.

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 2021 and include all plantings from the 2020–21 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 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

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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.

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