Wine
Australia

National Vintage Report 2020

At a glance summary

- The Australian winegrape crush for 2020 is estimated to be 1.52 million tonnes
- The crush is 12 per cent below the 2019 harvest and 13 per cent below the 10-year average of 1.75 million tonnes
- The average winegrape purchase price increased by 5 per cent to $694 per tonne
- The total estimated value of the crush decreased by 9 per cent from $1.17 billion in 2019 to $1.07 billion, with the reduction in crush partly compensated for by the increase in average value
- South Australia was the largest contributor with 47 per cent of the national crush, followed by NSW (32 per cent) and Victoria (17 per cent)
- The largest individual region was the South Australian Riverland, accounting for 34 per cent of the national vintage, followed by Murray Darling–Swan Hill in Vic/NSW (25 per cent) and Riverina NSW (20 per cent)
- Red varieties overall were down by 11 per cent while white varieties were down by 13 per cent
- Shiraz was the largest variety with a crush of 376,000 tonnes, accounting for 25 per cent of the total crush – an increase in share of one percentage point
- Chardonnay was the second largest variety overall and largest white variety with 285,000 tonnes but declined by two precentage points to 19 per cent and reduced its share of the total crush
- Of the top 10 red varieties, Merlot and Mataro/Mourvèdre declined the most, while Durif, Ruby Cabernet and Petit Verdot all increased slightly against the general trend
- Of the top 10 white varieties, Riesling and Chardonnay declined the most, while Prosecco and Pinot Gris/Grigio were the only two that did not decline.

Overview of the 2020 winegrape crush

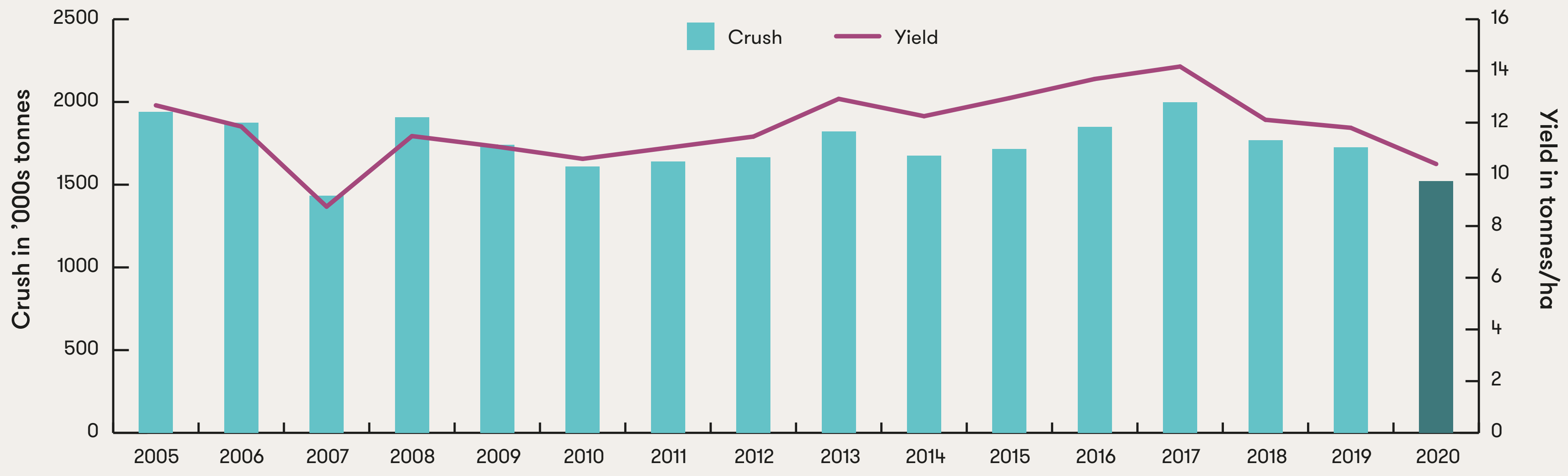
The 2020 Australian winegrape crush is estimated[1] to be 1.52 million tonnes – the equivalent of over 1 billion litres of wine. Approximately half of the crush came from South Australia, one-third from New South Wales and one-sixth from Victoria.

The 2020 crush was 12 per cent lower than the 2019 crush, and 13 per cent below the 10-year average of 1.75 million tonnes. It was the smallest crop since 2007 but in terms of yield it was most like 2010, when the crush was 1.61 million tonnes, but the vineyard area was about 4 per cent higher than the current area (see Figure 1).

A smaller crop was widely anticipated, given the dry conditions affecting much of Australia, compounded by bushfires and associated smoke damage in some regions as well as isolated frost, hail and flood events. These difficult conditions inevitably took their toll on crop potential; however, autumn temperatures were generally around average or slightly cooler, leading to ideal ripening and harvesting conditions, while the reduced yields resulted in more concentrated colours and flavours in the berries, which are expected to produce above-average quality wines. Virginia Willcock, chief winemaker at Vasse Felix in Margaret River, described the vintage as 'not a great vintage for accountants but a beautiful vintage for winemakers'[2].

Yields in the three large inland regions: Riverland (SA), Murray Darling–Swan Hill (VIC/NSW) and Riverina (NSW), which make up around three-quarters of the crush, were less affected than other regions due primarily to the availability of supplementary water. Together these regions were down by 4 per cent compared with 2019, while the remaining regions were down collectively by 34 per cent, with a wide range of individual variation.

Figure 1: Australian winegrape crush and average yield 2005–2020



1. Based on responses to the National Vintage Survey 2020

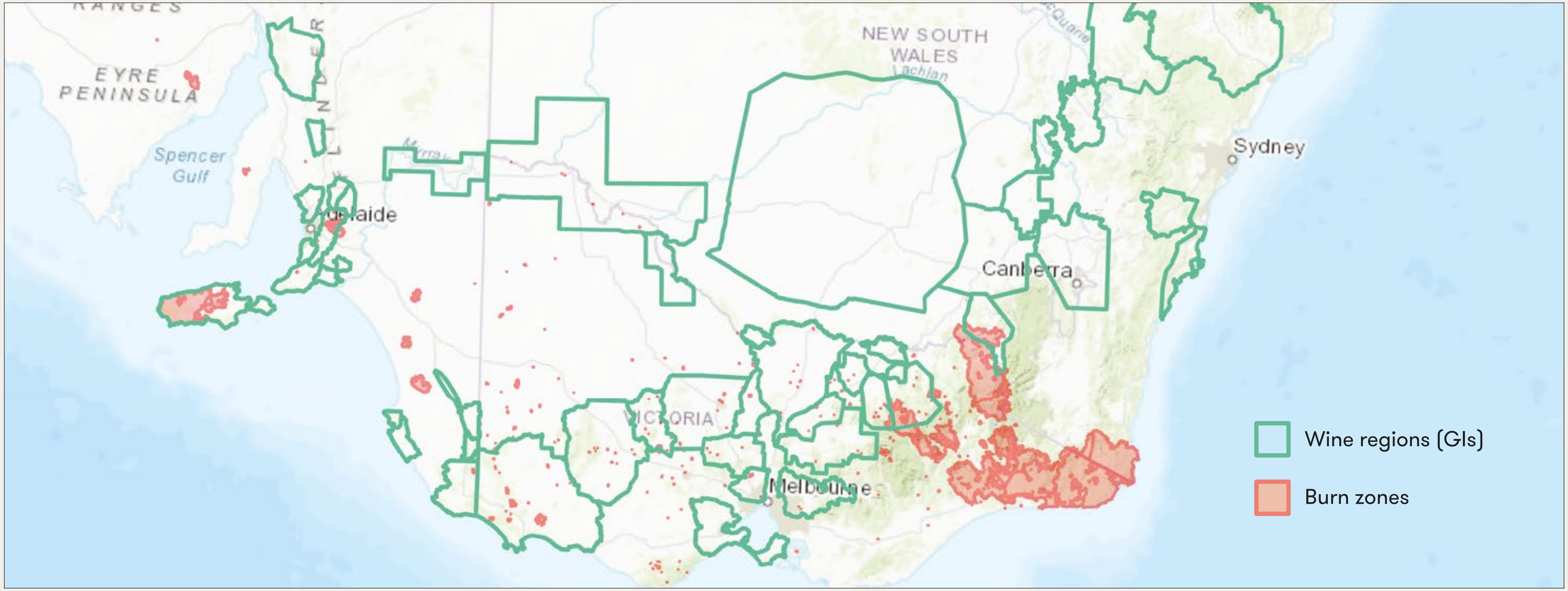
2. Wine Australia webinar, June 2020

Bushfire effects

Bushfires directly damaged vineyards in a small number of regions in 2020, while a larger number was affected by smoke damage. A supplementary survey was conducted by Wine Australia in conjunction with the National Vintage Survey 2020 to assess the effects of the bushfires on the crush. Results from the smoke survey indicated that approximately 40,000 tonnes of winegrapes were lost, rejected or substantially downgraded as a result of smoke or fire. While this represents a considerable loss on an individual basis, overall it equates to just 3 per cent of the national crush, meaning that the bushfires did not have as significant an impact as seasonal variations, weather events and drought.

The map below (Figure 2) shows the distribution of the major bushfires of the 2019–20 season in relation to Australia's winegrowing regions. There were reports of losses, rejection or positive smoke taint tests from 18 different regions, with the most affected (in terms of percentage crop reduction) being Hunter, Orange, Tumbarumba, Canberra District, Southern Highlands and Hilltops (NSW), Adelaide Hills and Kangaroo Island (South Australia) and Alpine Valleys, Beechworth and Glenrowan (Victoria). Most regions of Victoria and South Australia were unaffected, as were all the regions of Western Australia and Tasmania.

Figure 2: Distribution of bushfires relative to Australian wine regions February 2020

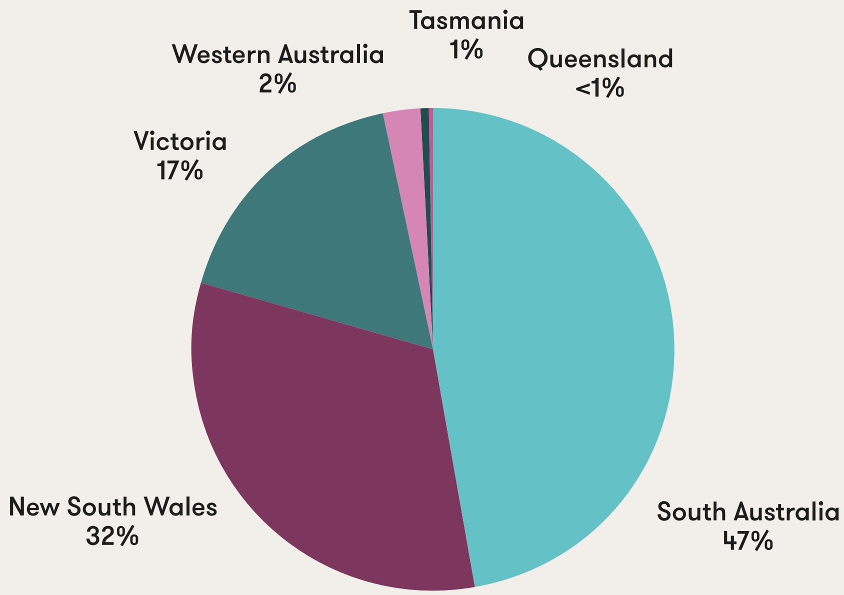


Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), © OpenStreetMap contributors, and the GIS User Community

Crush by state and region

South Australia accounted for an estimated 720,000 tonnes (47 per cent of the national crush). NSW was the second largest contributor with an estimated 491,000 tonnes[3] (32 per cent), followed by Victoria with 263,000 tonnes (17 per cent)[4].

Figure 3: Share of crush by state 2020



The largest individual region by crush size in 2020 was the South Australian Riverland, accounting for 34 per cent of the national vintage, followed by Murray Darling–Swan Hill in Vic/NSW (25 per cent) and Riverina NSW (20 per cent). All three increased their share compared with 2019. The fourth largest region in 2020 was McLaren Vale – reporting a larger crush than both Barossa Valley and Langhorne Creek for the first time since 2004. Margaret River jumped two places from 10th largest region in 2019 to 8th in 2020 (Table 1). According to the National Vineyard Scan 2019, McLaren Vale has an area of 7173 hectares compared with 11,156 hectares for the Barossa Valley and 6094 hectares for Langhorne Creek.

Outside of the top 10, the largest region by crush in NSW was Cowra and the largest in Victoria was King Valley. Tasmania reported 9166 tonnes and has a vineyard area of 1702 hectares (National Vineyard Scan 2019).

Table 1: Share of crush and planted area by region for top 10 regions

	Collected tonnes	% crush	Area	% area
Riverland	461,385	34%	21,816	15%
Murray Darling - Swan Hill	350,443	25%	15,577	11%
Riverina	268,547	20%	17,248	12%
McLaren Vale	28,751	2%	7,173	5%
Barossa Valley	28,326	2%	11,156	8%
Coonawarra	26,240	2%	5,293	4%
Langhorne Creek	24,286	2%	6,094	4%
Margaret River	21,312	2%	5,671	4%
Padthaway	16,428	1%	4,067	3%
Wrattonbully	12,372	1%	2,666	2%
All other regions	137,756	10%	49,583	34%
Total	**1,375,846**		**146,244**	

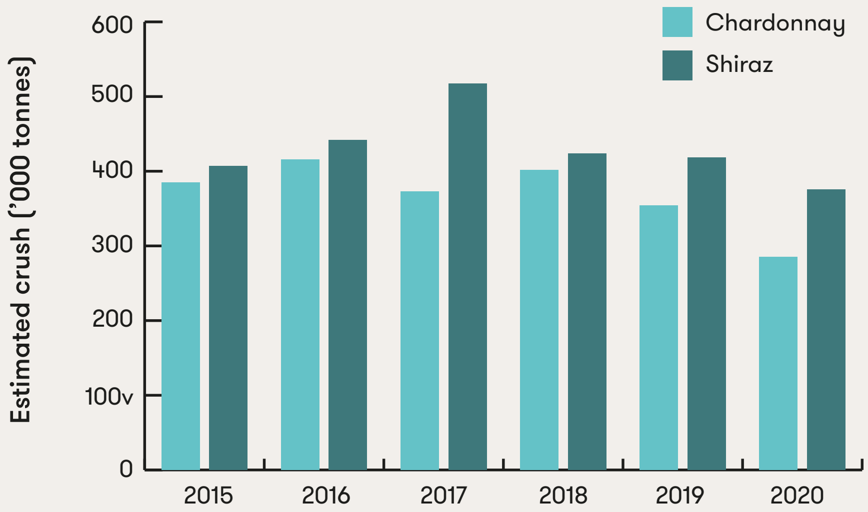
3. Murray Darling – Swan Hill is split between NSW (45 per cent) and Victoria (55 per cent).
4. These estimates are higher than the tonnes collected from each state, as they are raised to allow for the national estimated non-response rate of 9.5 per cent. Therefore, they do not match the figures in the state and regional summary tables, where only the collected tonnes are reported.

Crush by colour and variety

The overall reduction of 200,000 tonnes compared with 2019 was split almost 50:50 between red and white varieties. The crush of red grapes[5] in 2020 is estimated to be 836,462 tonnes – a reduction of 105,000 tonnes or 11 per cent compared with 2019. The white crush was 684,146 tonnes – down by just under 100,000 tonnes, which was slightly more in percentage terms (13 per cent). This led to the white crush reducing its share of the total to 45 per cent – down from 46 per cent in 2019 and 48 per cent in 2018.

The main contributor to the reduction in white crush was Chardonnay, which was down by 70,000 tonnes (19 per cent) compared with 2019. Chardonnay remained the second largest variety overall with 285,000 tonnes, but lost ground to Shiraz, which declined by 10 per cent (45,000 tonnes) to 376,000 tonnes (see Figure 4). Despite the decline, Shiraz fared relatively well compared with other varieties and increased its share by one percentage point to 45 per cent of all red varieties and 25 per cent of the total crush.

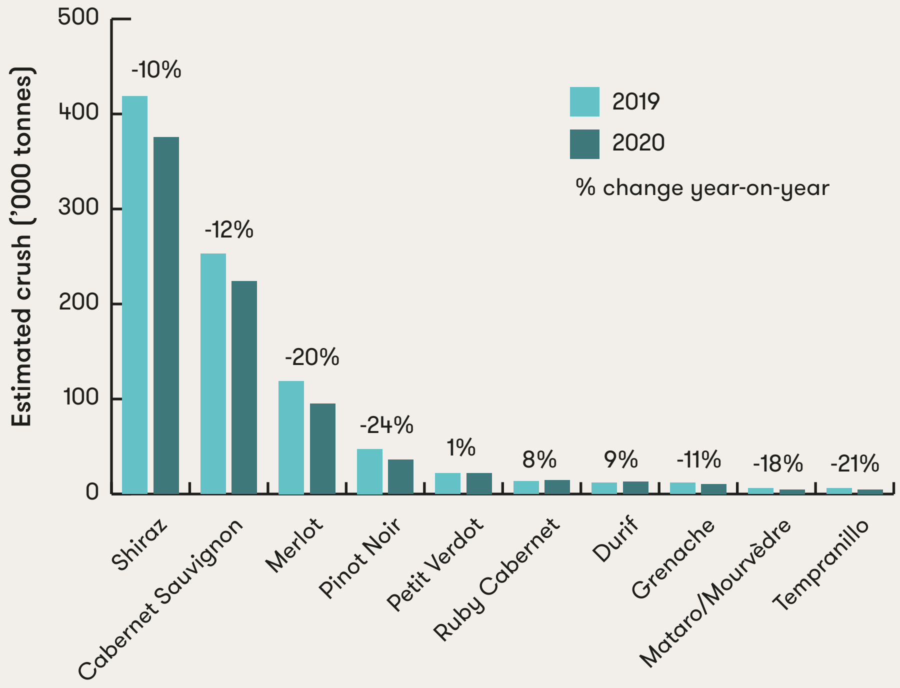
Figure 4: Chardonnay vs Shiraz crush 2015–2020



5. Pinot Noir is counted in the red crush although some of it is used to make white (sparkling) wine.

Of the top 10 red varieties (see Figure 5), Merlot was down by the most (20 per cent) while Durif and Ruby Cabernet increased by 9 per cent and 8 per cent respectively. Durif overtook Grenache to be the 7th largest red variety. The estimated crush of Durif has more than doubled in five years, from just under 6000 tonnes in 2015 to nearly 13,000 tonnes in 2020. Three-quarters of the Durif is grown in Riverina. Australian exports of Durif increased by 6 per cent in the 2019 calendar year. Exports of this variety[6] to the USA accounted for 34 per cent of all Durif exports and grew by 22 per cent.

Figure 5: Comparison of 2019 and 2020 crush for top 10 red varieties

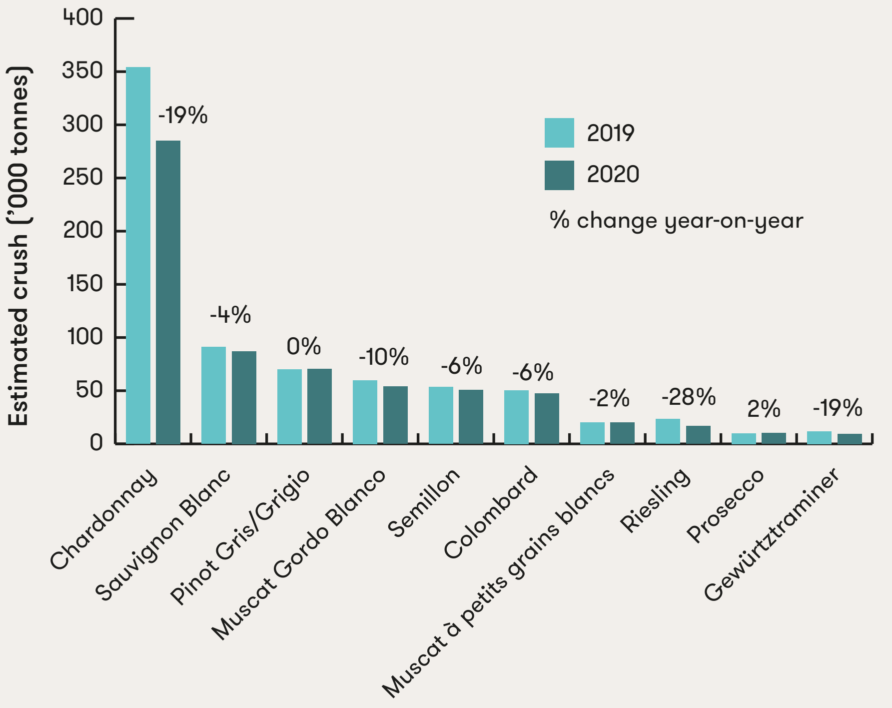


6. Based on variety content including blends containing Durif but not necessarily labelled with the variety

Figure 6 shows that all the top 10 white varieties decreased in 2020 compared with the previous year, except for Pinot Gris/Grigio, which was almost identical at just over 70,000 tonnes and Prosecco, which increased by 2 per cent to just over 11,000 tonnes and moved up to 9th place, overtaking Gewürztraminer. More than half the Prosecco produced in Australia comes from the King Valley.

Riesling suffered the biggest decrease – down 28 per cent to just under 17,000 tonnes, dropping below Muscat à Petits Grains Blancs to 8th place in the top 10. This is the first time since at least 2001 that the crush of Riesling has fallen below 20,000 tonnes. At its peak in 2005, it was over 40,000 tonnes. Around one-third of Riesling comes from the Clare Valley, with the Riverland, Riverina, Eden Valley and Padthaway the other significant contributors in terms of tonnage.

Figure 6: Comparison of 2019 and 2020 crush for top 10 white varieties



Other varieties

The top 10 red and top 10 white varieties together account for 95 per cent of the total crush in 2020. The remaining 68,942 tonnes are made up of a further 63 red and 51 white varieties. Some of these are individually reported in the regional summary tables while others are grouped under 'other red' or 'other white' because of their small volumes and/or small number of reporting wineries. There is a list on page 16 of the minor varieties crushed in Australia, as reported by respondents to the National Vintage Survey 2020.

Crush by winery size

The Australian wine sector is made up of a small number of large wine businesses and a large number of small wine businesses. According to the Wine Industry Directory 2020[7], there are 2230 wineries in Australia, over half of which crush less than 50 tonnes, while only 40 (2 per cent) crush more than 5000 tonnes. This is consistent with the Department of Agriculture, Water and the Environment levies report: in 2018–19, there were 2154 winegrape levy-payers, of whom 591 (27 per cent) crushed less than 10 tonnes and 52 (2 per cent) crushed 3000 tonnes or more.

In 2020, there were 505 respondents to the National Vintage Survey, plus a further 113 who reported a zero crush for the 2020 vintage. The distribution of responses reflects the overall structure of the Australian wine sector, with the largest size category accounting for 2 per cent of respondents and 60 per cent of the crush, while the smallest size category accounted for 41 per cent of the responses and less than 1 per cent of the crush (Figure 7 and 8, Table 2).

According to the results of the National Vintage Survey, the largest 20 wine businesses accounted for approximately 72 per cent of the total crush and the top 50 accounted for approximately 85 per cent. However, it should be noted that the small business contribution is very important to the accuracy of the report at the individual regional level, particularly for the smaller regions.

Table 2: Crush by winery size 2020

	# of respondents	% of reported crush	% of respondents
50,000 tonnes +	8	60%	2%
5,000–49,999 tonnes	28	30%	6%
1,000–4,999 tonnes	35	6%	7%
500–999 tonnes	38	2%	8%
50–499 tonnes	188	2%	37%
Under 50 tonnes	208	0.3%	41%
Total	**505**	**100%**	**100%**

7. Published by Winetitles

Figure 7: Share of responses by winery size

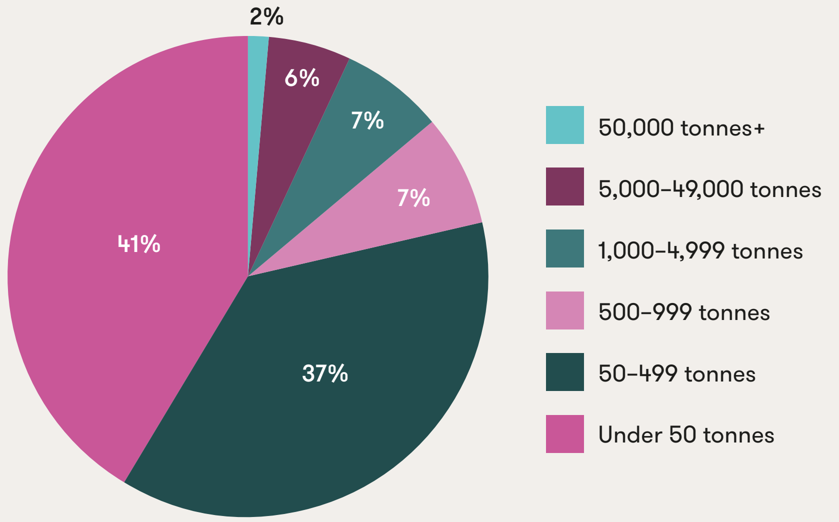
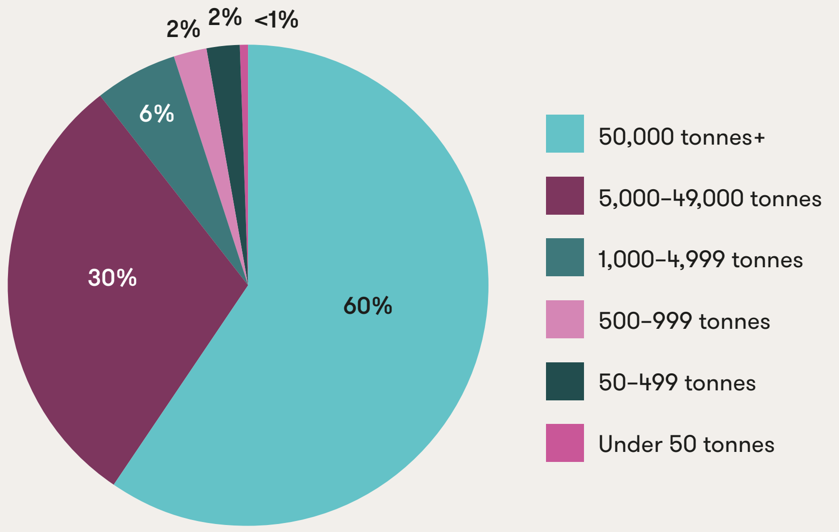


Figure 8: Share of reported crush by winery size



Analysis of grape purchases

The winegrapes reported in the National Vintage Survey are classified as either 'winery grown' or 'purchased' – ie bought from an independent supplier. There is a wide spectrum of business models, from wineries that only use their own fruit and do not purchase any grapes, to those that purchase all their grapes and grapegrowers who do not make any wine. In between, many wine businesses are both winemakers and grapegrowers – either predominantly selling their grapes but keeping some back for their own wine production, or growing some grapes and purchasing the balance of their supply from grapegrowers. There are estimated to be 2230 wineries in Australia and around 6,200 winegrape growers.

Of the 505 respondents to the National Vintage Survey 2020, 332 (66 per cent) reported purchasing grapes. Of these, 101 (20 per cent) only reported purchased fruit – i.e. did not grow any of their own, while 231 (46% of all respondents) had a mix of purchased and own-grown fruit (see Figure 9).

Figure 9: Respondents by grape supply

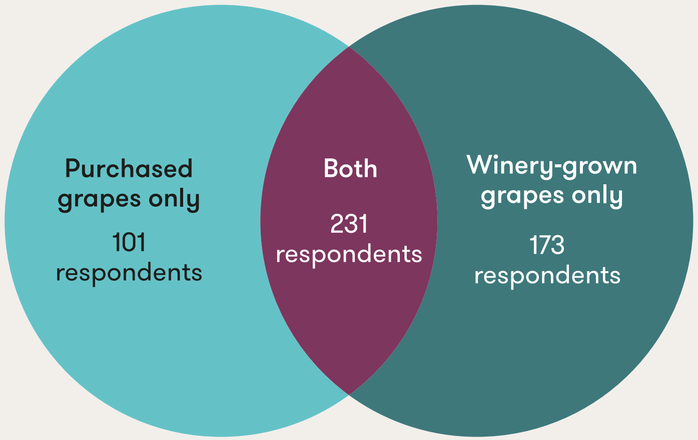


Table 3: Respondents by business model (grape supply)

	# respondents	% total
Some purchased	332	66%
All winery grown	173	34%
Both	231	46%
Some grown	404	80%
All purchased	101	20%
Total	**505**	**100%**

There were 926,160 tonnes of purchased grapes reported in 2020 – accounting for 67 per cent of the total collected tonnes. The purchases were made up of 27,432 individual batches[8] with a total reported value of $642,864,923.

The average value across all purchases in 2020 was $694 per tonne, an increase of 5 per cent on the 2019 average value of $663 per tonne.

The average value of reds increased by 3 per cent ($28 per tonne) to $871 per tonne, while the average value of whites increased by 5 per cent ($25 per tonne) to $486 per tonne (Table 4).

Table 4: Tonnes purchased and average value year-on-year comparison

Colour	2019 Purchased tonnes	2019 Average value ($/tonne)	2020 Purchased tonnes	2020 Average value ($/tonne)	% change in average value
Red	557,863	$843	500,009	$871	3%
White	497,185	$461	426,151	$486	5%
Total	**1,055,049**	**$663**	**926,160**	**$694**	**5%**

8. Most transactions represent individual purchases but some respondents choose to group transactions by variety and region, which does not affect the average value but makes the price dispersion analysis slightly less accurate.

The differential between reds and whites has been increasing since 2011, when the overall average price reached a low of $413 per tonne. Since then, winegrape prices have generally been rising, although the lowest price for whites was $344 per tonne in 2014 (see Figure 10). The average value for reds is now at 74 per cent of its peak ($933 in 2001), while the average value for whites is at 63 per cent of its peak ($766 in 2003).

The increasing differential between average prices for red and white varieties may be contributing to a change in the varietal mix. While seasonal factors have a strong effect, there appears to be a slight downward trend in the share of white varieties, since it peaked at 50 per cent in 2015 (Figure 11).

Figure 10: Comparison of red and white average winegrape purchase value 2007–2020

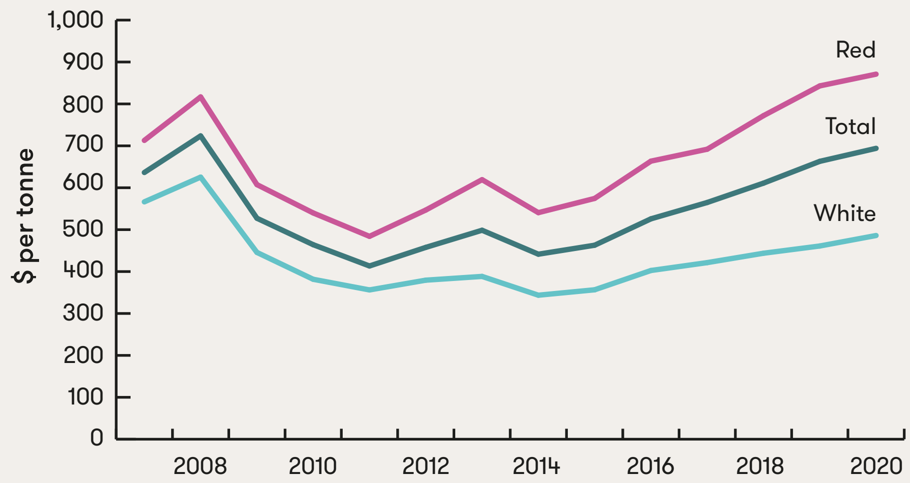
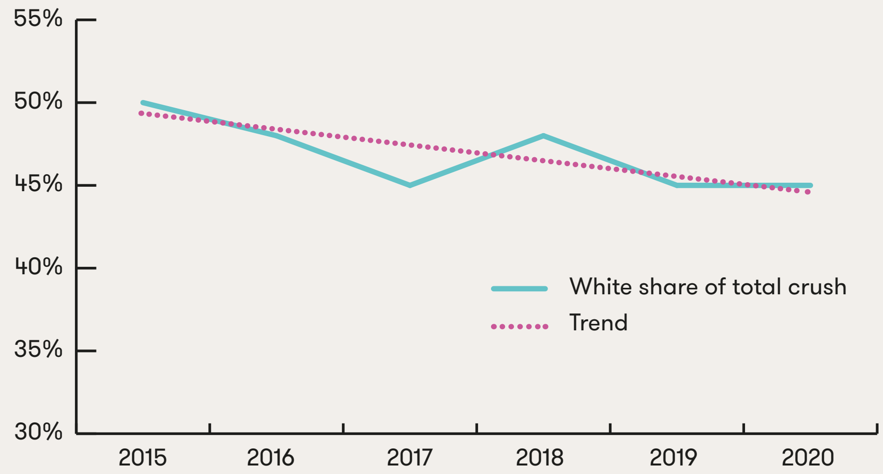


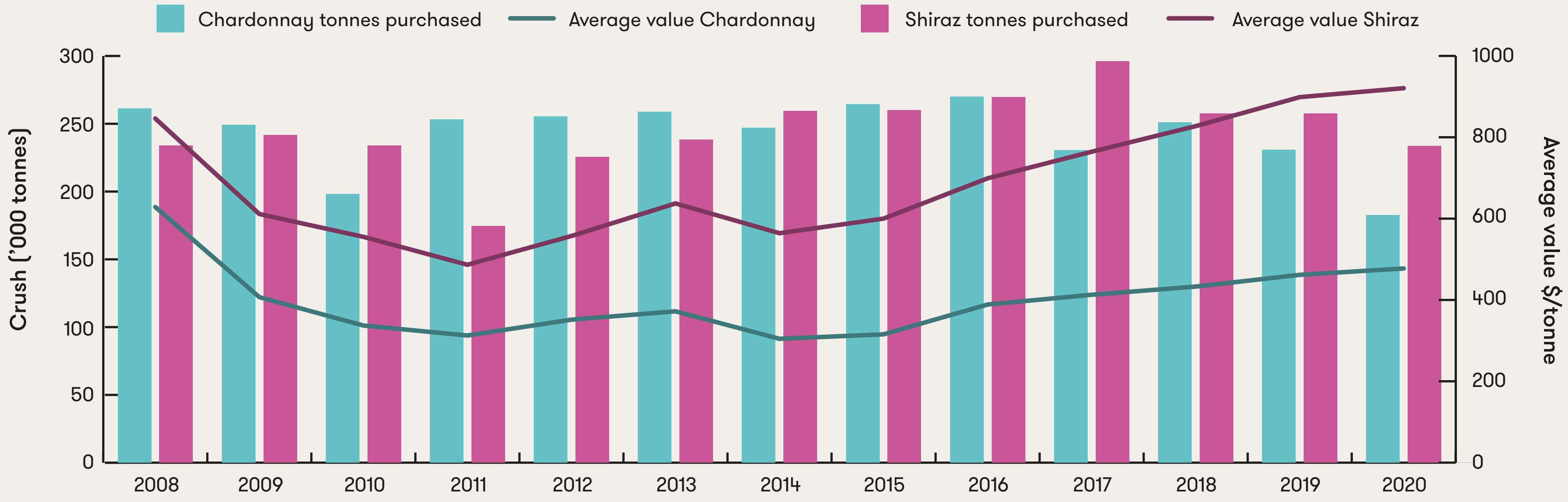
Figure 11: White share of total crush 2015–2020 (source: ABS and Wine Australia)



In 2020, the total tonnes of Chardonnay purchased was the lowest recorded since 2001[9], despite six years of annual increases in the average price for Chardonnay. While seasonal factors were the main driver in 2020, the decrease in Chardonnay was greater than that for Shiraz. Planting data for South Australia shows that the area of Chardonnay in South Australia has decreased by 1000 hectares since 2015, while Shiraz has increased by 1700 hectares over the same timeframe[10].

Figure 12 shows that the increase in average value for Shiraz is far outpacing that for Chardonnay, leading to strong demand signals favouring Shiraz.

Figure 12: Comparison of Shiraz and Chardonnay tonnes purchased and average value 2008–2020



9. Some of the decrease can be attributed to recent changes in ownership of large vineyards, which has transferred the fruit from the 'purchased' into the 'winery grown' category. However, the relative decrease has been greater for Chardonnay than for Shiraz.
10. Source: Vinehealth Australia

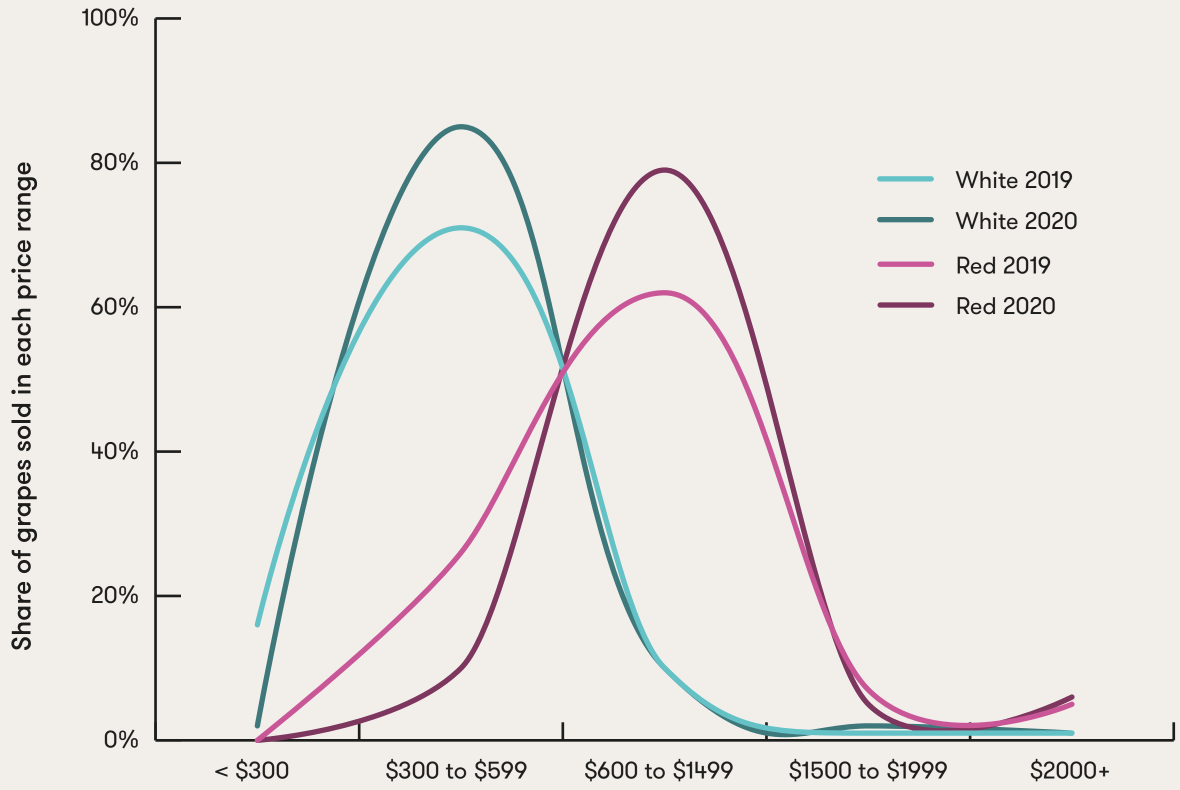
Price dispersion

The dispersion of prices paid can be determined from an analysis of the batch data. Each batch is assigned to a price segment and the volume purchased in each segment determined. The dispersion analysis for 2020 indicates an upward shift in prices at the lower end of the spectrum but little movement at the top end. The proportion of white grapes purchased at less than $300 per tonne reduced from 16 per cent to 2 per cent, with a corresponding increase in the share purchased at $300-$600 per tonne from 71 per cent to 85 per cent. For reds, the share purchased at $600-$1500 per tonne increased from 62 per cent to 79 per cent, with a corresponding reduction in the lower price segment (Figure 13).

Estimated value of the Australian winegrape crush

Using the average value calculated for each variety and assigning the same value to winery grown fruit gives an estimate of the value of the total crush. In 2020, the estimated value of the total crush was down 9 per cent to $1.07 billion compared with $1.17 billion in 2019 (see Table 5). The 9 per cent reduction reflects the reduction in tonnage partly offset by the increase in average value.

Figure 13: Price dispersion for red and white purchased grapes 2020 vs 2019



	< $300	$300 to $599	$600 to $1499	$1500 to $1999	$2000+
White 2019	16%	71%	10%	1%	1%
White 2020	2%	85%	10%	2%	1%
Red 2019	0%	26%	62%	7%	5%
Red 2020	0%	10%	79%	5%	6%

Table 5: Crush by major variety 2020

Major varieties	2020 tonnes	Per cent change in tonnes	2020 weighted average purchase price	Percent change in price	Est total value ALL grapes
Red					
Shiraz	375,618	-10%	$921	2%	$345,838,727
Cabernet Sauvignon	223,942	-12%	$876	4%	$196,276,126
Merlot	95,195	-20%	$671	4%	$63,894,213
Pinot Noir	35,958	-24%	$1,083	6%	$38,944,747
Petit Verdot	22,179	1%	$577	13%	$12,787,196
Ruby Cabernet	14,706	8%	$560	5%	$8,232,640
Durif	12,796	9%	$691	-1%	$8,837,815
Grenache	10,596	-11%	$1,209	23%	$12,812,663
Mataro/Mourvèdre	4,807	-18%	$984	15%	$4,730,761
Tempranillo	4,744	-21%	$995	-4%	$4,718,618
Other red	35,920	10%			$28,013,576
Red Total	**836,462**	**-11%**	**$871**	**3%**	**$725,087,083**
White					
Chardonnay	285,204	-19%	$477	3%	$136,157,927
Sauvignon Blanc	87,071	-4%	$592	4%	$51,518,880
Pinot Gris/Grigio	70,415	0%	$643	2%	$45,282,353
Muscat Gordo Blanco	54,044	-10%	$324	17%	$17,509,622
Semillon	50,504	-6%	$437	7%	$22,068,637
Colombard	47,318	-6%	$314	14%	$14,868,775
Muscat à petits grains blancs	20,017	-2%	$362	2%	$7,251,323
Riesling	16,819	-28%	$990	9%	$16,648,500
Prosecco	10,188	2%	$791	-5%	$8,062,677
Gewürztraminer	9,545	-19%	$384	0%	$3,665,705
Other white	33,021	-16%			$17,259,136
White Total	**684,146**	**-13%**	**$486**	**5%**	**$340,293,534**
Grand Total	**1,520,608**	**-12%**	**$694**	**5%**	**$1,065,380,618**

Table 6: Crush by state and region 2020

Region	Tonnes purchased	Winery grown tonnes	Winery grown share	Total collected tonnes[11]	Share of national crush	Number of respondents
Murray Darling - Swan Hill	**235,221**	**115,221**	**33%**	**350,443**	**25.5%**	**38**
Murray Darling - Swan Hill	235,221	115,221	33%	350,443	25.5%	38
New South Wales (excluding Murray Darling – Swan Hill)	**196,984**	**89,922**	**31%**	**286,905**	**20.9%**	**62**
Big Rivers zone other	1,814	5,555	75%	7,369	0.5%	<5
Central Ranges zone other	958	228	19%	1,187	0.1%	7
Cowra	2,725	30	1%	2,755	0.2%	8
Gundagai	377	-	0%	377	0.0%	<5
Hastings River	-	10	100%	10	0.0%	<5
Hilltops	929	114	11%	1,043	0.1%	9
Hunter	880	1,278	59%	2,158	0.2%	23
Mudgee	657	1,094	62%	1,751	0.1%	5
New England Australia	-	17	100%	17	0.0%	<5
Northern Rivers zone other	8	-	0%	8	0.0%	<5
Orange	478	979	67%	1,457	0.1%	17
Perricoota	223	-	0%	223	0.0%	<5
Riverina	187,935	80,612	30%	268,547	19.5%	18
Shoalhaven Coast	-	5	100%	5	0.0%	<5
Queensland	**12**	**161**	**93%**	**172**	**0.0%**	**13**
Granite Belt	10	57	85%	67	0.0%	9
Queensland zone other	1	66	98%	67	0.0%	4
South Burnett	1	39	99%	39	0.0%	<5
South Australia	**453,624**	**197,571**	**30%**	**651,195**	**47.3%**	**244**
Adelaide Hills	8,632	3,417	28%	12,049	0.9%	72
Adelaide Plains	2,121	4	0%	2,125	0.2%	8
Barossa Valley	17,506	10,820	38%	28,326	2.1%	80
Barossa zone other	-	743	100%	743	0.1%	<5
Clare Valley	5,890	6,056	51%	11,946	0.9%	42
Coonawarra	8,165	18,076	69%	26,240	1.9%	36
Currency Creek	1,521	1,668	52%	3,189	0.2%	17

11. The total collected tonnes are lower than the total estimated tonnes reported in the National Vintage Report due to the estimated non-response rate of 9.5%

Table 6: Crush by state and region 2020 (continued)

Region	Tonnes purchased	Winery grown tonnes	Winery grown share	Total collected tonnes[11]	Share of national crush	Number of respondents
Eden Valley	1,825	1,799	50%	3,624	0.3%	41
Fleurieu zone other	2,033	134	6%	2,167	0.2%	11
Kangaroo Island	19	126	87%	145	0.0%	<5
Langhorne Creek	17,778	6,508	27%	24,286	1.8%	49
Limestone Coast zone other	2,252	4,877	68%	7,129	0.5%	21
Lower Murray zone other	4,027	90	2%	4,117	0.3%	9
McLaren Vale	18,183	10,568	37%	28,751	2.1%	85
Mount Benson	1,389	872	39%	2,260	0.2%	10
Mount Gambier	391	258	40%	649	0.0%	7
Mount Lofty Ranges zone other	575	29	5%	604	0.0%	7
Padthaway	11,104	5,324	32%	16,428	1.2%	21
Riverland	344,087	117,299	25%	461,385	33.5%	66
Robe	189	1,168	86%	1,356	0.1%	5
Southern Fleurieu	601	7	1%	608	0.0%	11
Southern Flinders Ranges	375	241	39%	615	0.0%	5
The Peninsulas	75	5	6%	79	0.0%	<5
Wrattonbully	4,889	7,483	60%	12,372	0.9%	24
Tasmania	**2,467**	**6,699**	**73%**	**9,166**	**0.7%**	**10**
Tasmania	2,467	6,699	73%	9,166	0.7%	10
Victoria (excluding Murray Darling – Swan Hill)	**18,439**	**26,499**	**59%**	**44,938**	**3.3%**	**150**
Alpine Valleys	504	-	0%	504	0.0%	<5
Beechworth	-	17	100%	17	0.0%	<5
Bendigo	1,260	140	10%	1,400	0.1%	12
Central Victoria zone other	435	2,072	83%	2,507	0.2%	<5
Geelong	153	831	84%	984	0.1%	10
Gippsland	-	149	100%	149	0.0%	<5
Glenrowan	18	363	95%	381	0.0%	<5
Goulburn Valley	3,189	3,223	50%	6,412	0.5%	18
Grampians	487	885	65%	1,372	0.1%	11
Heathcote	2,154	4,896	69%	7,049	0.5%	38

11. The total collected tonnes are lower than the total estimated tonnes reported in the National Vintage Report due to the estimated non-response rate of 9.5%

Table 6: Crush by state and region 2020 (continued)

Region	Tonnes purchased	Winery grown tonnes	Winery grown share	Total collected tonnes[11]	Share of national crush	Number of respondents
Henty	6	225	97%	231	0.0%	<5
King Valley	5,654	5,156	48%	10,810	0.8%	21
Macedon Ranges	15	30	67%	44	0.0%	7
Mornington Peninsula	596	1,107	65%	1,703	0.1%	28
North East Victoria zone other	19	23	55%	42	0.0%	<5
North West Victoria zone other	31	116	79%	147	0.0%	<5
Port Phillip zone other	9	16	64%	25	0.0%	<5
Pyrenees	353	617	64%	970	0.1%	14
Rutherglen	162	2,077	93%	2,239	0.2%	10
Strathbogie Ranges	176	1,130	87%	1,305	0.1%	8
Sunbury	47	-	0%	47	0.0%	<5
Upper Goulburn	338	18	5%	356	0.0%	8
Western Victoria zone other	38	-	0%	38	0.0%	2
Yarra Valley	2,796	3,410	55%	6,206	0.5%	38
Western Australia	**19,414**	**13,613**	**41%**	**33,027**	**2.4%**	**89**
Blackwood Valley	631	-	0%	631	0.0%	6
Central Western Australia	2	-	0%	2	0.0%	<5
Geographe	1,141	502	31%	1,643	0.1%	20
Great Southern	3,505	1,945	36%	5,450	0.4%	27
Manjimup	13	3	17%	16	0.0%	<5
Margaret River	12,528	8,784	41%	21,312	1.5%	59
Peel	-	12	100%	12	0.0%	<5
Pemberton	812	473	37%	1,285	0.1%	15
Perth Hills	115	33	22%	148	0.0%	8
Swan District	667	1,861	74%	2,528	0.2%	14
Grand Total	**926,160**	**449,686**	**33%**	**1,375,846**	**100.0%**	**505[12]**

11. The total collected tonnes are lower than the total estimated tonnes reported in the National Vintage Report due to the estimated non-response rate of 9.5%
12. The total number of respondents is less than the sum of respondents for individual regions/states as respondents can source fruit from multiple regions.

Varieties outside the top 10 reported in the National Vintage Survey 2020

These varieties were outside the top 10 for each colour but reported individually in the regional summary tables, as there are always at least three wineries per region reporting the variety. These are listed in order of reported crush volume:

Reds:

- Malbec
- Sangiovese
- Muscat à petits grains rouges
- Nero d'Avola
- Montepulciano
- Barbera
- Cabernet Franc
- Touriga Nacional
- Pinot Meunier
- Graciano
- Nebbiolo
- Lagrein

Whites:

- Verdelho
- Viognier
- Chenin blanc
- Fiano
- Vermentino
- Marsanne
- Roussanne
- Grüner Veltliner

Varieties grouped as 'other' in regional summary reports but which have at least three wineries reporting them in total – listed alphabetically.[13]

Other reds:

- Aglianico
- Alicante Bouschet
- Black Muscat
- Carignan
- Carmenere
- Chambourcin
- Cinsaut
- Counoise
- Dolcetto
- Gamay
- Lambrusco
- Mencia
- Negroamaro
- Rubired
- Sagrantino
- Saperavi
- Souzao
- Tannat
- Tarrango
- Tinta Barroca
- Tinta Cao
- Zinfandel

Other whites:

- Albarino
- Arinto
- Arneis
- Canada Muscat
- Doradillo
- Greco
- Grenache Blanc
- Moscato Giallo
- Muscadelle (Tokay)
- Orange Muscat
- Palomino Fino
- Pedro Xímenez
- Pinot blanc
- Savagnin
- Sultana
- Trebbiano
- Verdejo
- Verduzzo

13. There are a further 29 red and 25 white varieties reported by at least one winery – including some that are not identified by name. These are not listed to protect the confidentiality of the respondents.

Method

The National Vintage Survey is a single annual crush and price survey conducted by Wine Australia on behalf of the Australian wine sector. This report has been prepared by Wine Australia based on an analysis of survey results.

All known wine businesses were surveyed. Wine Tasmania conducted the survey in Tasmania in collaboration with Wine Australia to ensure alignment of method and to minimise survey load.

Respondents were asked to provide individual transaction data by variety and region for grape purchases and a summary of their own (winery) grown fruit by variety and region. This enables accurate reporting of crush (production) and price dispersion data by variety and GI region as well as at a national and state level.

Responses were received from 505 businesses, including all wineries known to have crushed over 1,000 tonnes. The collected tonnage is estimated to account for 90.5 per cent of all winegrapes crushed in 2020.

Calculating the national crush estimate

At a national level, the data collected has been scaled up to provide an estimate of the actual crush by variety (including non-collected tonnes).

The actual crush figure for each vintage is taken to be the figure provided by the Department of Agriculture (now Department of Agriculture Water and the Environment) levies unit, which collects levies based on crush and is the most accurate crush figure available. This figure is updated as levy returns are received and is not finalised until at least 12-18 months after the vintage it refers to. Therefore, Wine Australia prepares an early estimate of the crush for the wine sector based on the survey results.

The crush estimate is based on calculating the ratio of tonnes collected in the survey in the current year to the tonnes collected from the same respondents in the previous year[13]. This is assumed to be representative of the overall change in crush volume between the two years, although it can be affected by other factors including changes of ownership and business decisions around use of fruit.

This change in crush is applied to the final Dept of Agriculture figure[14] for the previous vintage to provide an estimate for the current vintage.

The Wine Australia estimate in the 2019 survey was 1,728,454 tonnes. This estimate was within 3,000 tonnes (0.2 per cent) of the Department of Agriculture figure as at May 2020.

2020 estimated crush calculation

Change in crush from respondents who responded in 2019 and 2020: -11.9%

Department of Agriculture figure for 2019: 1,725,758 tonnes

Calculation: 1,725,758 × (1 – 0.119) = 1,520,608

Wine Australia estimated crush for 2020: 1,520,608 tonnes

It should be noted that the 2019 figures reported in this report will vary slightly from what was reported last year, as they have been adjusted based on using the updated Department of Agriculture recorded figure for 2019 and incorporating late responses.

13. The tonnage collected from this group is 89% of the total estimated crush

14. In fact, the Dept of Agriculture figure can continue to change for many months as late returns are received. The latest available figure (used in this calculation) is from May 2020.

Notes on the regional summary tables

Individual regional tables and state reports prepared based on the survey results use the collected figures rather than scaled-up figures, and are therefore likely to underestimate their total crush but do not build in any assumptions, which would be less reliable at a variety-region level of detail.

Where tonnes purchased have been reported without a price attached, these tonnes are not included in the price dispersion section of the table or in the calculation of the average price for that variety. Therefore the total tonnes purchased may be higher than the sum of tonnes in each price bracket and the average purchase value may be higher than the total reported value divided by the total reported tonnes for that variety.

Where there are fewer than three wineries reporting a purchase of a particular variety, the total purchase value and average price are not displayed in the report to protect confidentiality. However, the calculated value is included in the total purchase value for red and white varieties overall.

The value of winery-grown fruit is estimated using the same calculated average purchase value as applies for purchased fruit of that variety in that region. Where there are no purchases of a particular variety, the average for that variety across all similar regions is used to estimate the value, or – if that is not available – then the average for red or white in the same region is used. It should be noted that this figure is an estimate only as winery-grown fruit by definition does not have a commercial purchase value.

Note: there are variations in the calculation of total winegrape value depending on whether the calculation is made at a varietal/regional or varietal/national level as a result of changes in the proportion of own grown and purchased fruit.

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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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Disclaimer

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 and administering the Export and Regional Wine Support Package (ERWSP).

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 and funds the ERWSP.