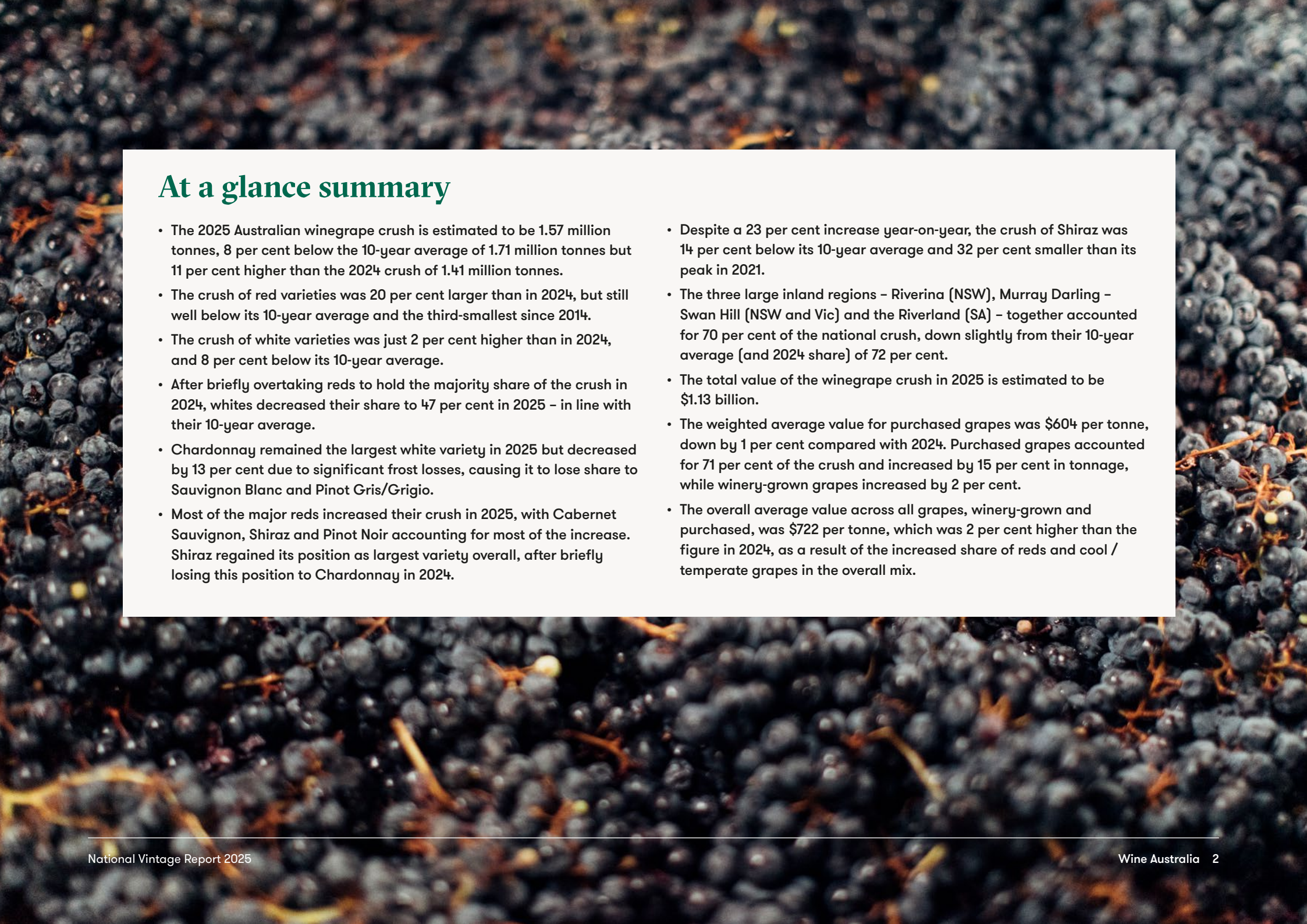
Wine Australia

National Vintage Report 2025



At a glance summary

- The 2025 Australian winegrape crush is estimated to be 1.57 million tonnes, 8 per cent below the 10-year average of 1.71 million tonnes but 11 per cent higher than the 2024 crush of 1.41 million tonnes.
- The crush of red varieties was 20 per cent larger than in 2024, but still well below its 10-year average and the third-smallest since 2014.
- The crush of white varieties was just 2 per cent higher than in 2024, and 8 per cent below its 10-year average.
- After briefly overtaking reds to hold the majority share of the crush in 2024, whites decreased their share to 47 per cent in 2025 – in line with their 10-year average.
- Chardonnay remained the largest white variety in 2025 but decreased by 13 per cent due to significant frost losses, causing it to lose share to Sauvignon Blanc and Pinot Gris/Grigio.
- Most of the major reds increased their crush in 2025, with Cabernet Sauvignon, Shiraz and Pinot Noir accounting for most of the increase. Shiraz regained its position as largest variety overall, after briefly losing this position to Chardonnay in 2024.
- Despite a 23 per cent increase year-on-year, the crush of Shiraz was 14 per cent below its 10-year average and 32 per cent smaller than its peak in 2021.
- The three large inland regions – Riverina (NSW), Murray Darling – Swan Hill (NSW and Vic) and the Riverland (SA) – together accounted for 70 per cent of the national crush, down slightly from their 10-year average (and 2024 share) of 72 per cent.
- The total value of the winegrape crush in 2025 is estimated to be $1.13 billion.
- The weighted average value for purchased grapes was $604 per tonne, down by 1 per cent compared with 2024. Purchased grapes accounted for 71 per cent of the crush and increased by 15 per cent in tonnage, while winery-grown grapes increased by 2 per cent.
- The overall average value across all grapes, winery-grown and purchased, was $722 per tonne, which was 2 per cent higher than the figure in 2024, as a result of the increased share of reds and cool / temperate grapes in the overall mix.

Overview of the 2025 winegrape crush

The 2025 Australian winegrape crush is estimated[1] to be 1.57 million tonnes, 11 per cent higher than the 2024 crush of 1.41[2] million tonnes but 8 per cent below the 10-year average (2015–2024) of 1.71 million tonnes (Figure 1).

The 2025 crush was the third vintage in a row to be below the long-term average. The succession of smaller vintages has seen the five-year average (2020–2024) fall to 1.60 million tonnes, 103,000 tonnes smaller than the 10-year average. The 2025 crush was only 2 per cent below this recent average.

The total estimated value of the 2025 crush is $1.13 billion, an increase of 14 per cent compared with 2024.

Figure 1: Australian winegrape crush 2015–2025

1 Based on responses to the National Vintage Survey 2025 and scaled up to account for non-responses

2 Department of Agriculture, Fisheries and Forestry, June 2025

Vintage conditions

The below-average sized crush in 2025 is likely to have been due to both seasonal factors and deliberate decisions by grapegrowers and winemakers to restrict production or intake.

Australia had its second-hottest year on record in 2024 and also the wettest year in over a decade. Record warm sea temperatures were a key feature of the calendar year, while El Niño and the Indian Ocean Dipole both remained generally neutral.

Rainfall across the whole year was well above the 1961–1990 average for Australia as a whole, leading to the wettest year since 2011. However, the rainfall distribution was quite uneven. Although most of Western Australia and inland NSW had high rainfall, total rainfall in many of the winegrowing regions of Australia was well below average – including south-eastern NSW, most of Victoria, southern and south-eastern South Australia and parts of Tasmania.

In an isolated extreme event in mid-September, temperatures across south-east Australia fell to at least 10 degrees below average, producing the coldest spring temperatures on record in many areas of South Australia, Victoria and the ACT. This cold snap led to widespread frost damage described as being like a 'blowtorch' across many regions, notably affecting early-ripening white varieties such as Chardonnay and Colombard.

At the opposite extreme, a heatwave across much of Victoria and South Australia in mid-December caused temperatures to rise well above average. The hot dry conditions caused a major bushfire in the Grampians National Park in Western Victoria, which had a devastating impact on the vineyards in that region.

Despite these major events, comments on the season provided by respondents to the 2025 National Vintage Survey were more positive than negative. The dry conditions in many regions led to low disease pressure, while several respondents reported growing conditions being much better than in the past few years. Standout regions were Geographe and Margaret River in Western Australia, Wrattonbully in South Australia and Orange in NSW in terms of good reported seasonal conditions.

Many of the negative comments related more to the economic than seasonal factors, with several reports of low demand, unsustainable grape prices and difficulties in selling fruit.

The National Vintage Survey cannot capture how many tonnes were *not* harvested or crushed, as it only collects information from wineries on grape intake. There is currently no accurate estimate of the national vineyard supply base; however, the South Australian Vineyard Register maintained by Vinehealth Australia shows that there has been almost no change in the total vineyard area for that state in the past five years, which suggests that a crush at least in line with the 2022 crush of 1.74 million tonnes would have been easily possible in 2025 without deliberate reductions for strategic reasons.

Vintage by colour and variety

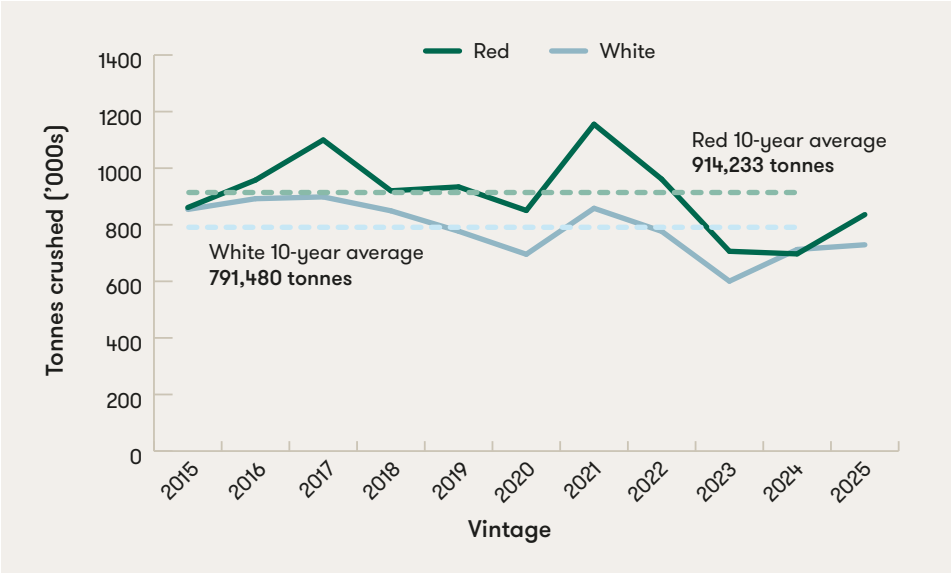
Overall, the crush in 2025 was 155,569 tonnes larger than in the previous year. Reds accounted for 89 per cent of the increase (138,960 tonnes), reversing the experience in 2024 when the overall increase was driven entirely by white varieties.

The crush of red varieties[3] in 2025 is estimated to be 835,958 tonnes, 20 per cent higher than in 2024. Despite the increase, the crush of red grapes is still estimated to be the third-smallest since 2014 (the last two years being the smallest), and was 9 per cent below its 10-year average of 914,233 tonnes.

The crush of white varieties in 2025 is estimated to be 729,177 tonnes, just 2 per cent higher than in 2024 and 8 per cent below its 10-year average of 791,480 tonnes.

Despite the short-term increases, the crush of both red and white varieties has shown signs of a declining trend over the past 10 years (Figure 2).

Figure 2: Winegrape crush by colour 2015–2025



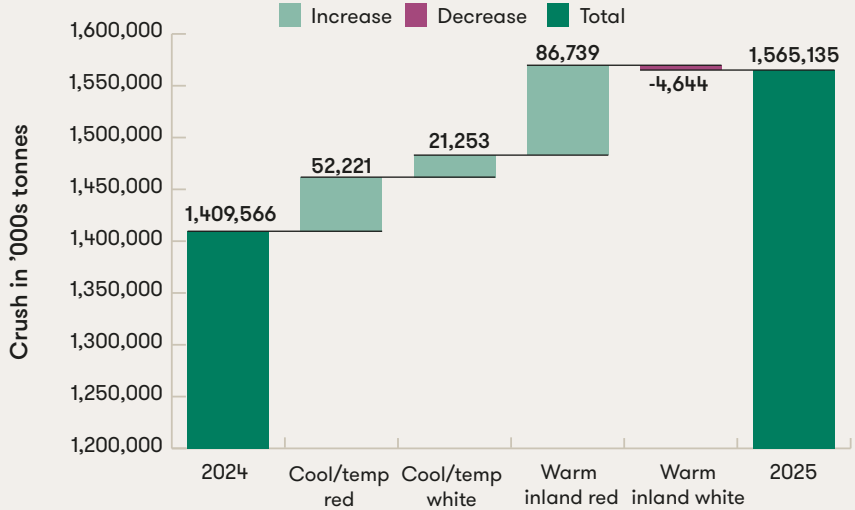
3 Grapes are classified according to their skin colour, even though some red grapes (eg Pinot Noir) may be used in white wine.

Both the warm inland[4] and the cool/temperate regions[5] contributed to the increase in the crush of reds, with the warm inland regions increasing by more in terms of tonnes, but slightly less relative to their share of the overall red crush (Figure 3).

The increase in whites came entirely from the cool / temperate regions, which increased by 21,253 tonnes (a 16 per cent increase), while the white crush from the warm inland regions decreased by 4,644 tonnes (-1 per cent).

After briefly overtaking reds to hold the majority share of the crush (51 per cent) in 2024, the different results for reds and whites in 2025 led to whites decreasing their share to 47 per cent – in line with their 10-year average share.

Figure 3: Change in crush by colour and location in 2025



4 The Riverland (South Australia), Murray Darling–Swan Hill (NSW and Victoria) and Riverina (NSW)

5 All other defined Geographical Indication (GI) regions except the three identified as warm inland

Top 10 varieties – white

Underpinning the overall decline in whites was a big decrease in Chardonnay – down an estimated 42,247 tonnes or 13 per cent – and a smaller decrease in Colombard (down an estimated 9,856 tonnes). These varieties were heavily impacted by the major spring frost events and had reductions across all the warm inland regions.

As a result, while Chardonnay remained the largest white variety in 2025 with 286,282 tonnes, it lost share to Sauvignon Blanc and Pinot Gris/Grigio, which both saw increases of over 30 per cent year-on-year.

Of the top 10, Prosecco had the largest increase in percentage terms – up 42 per cent to 24,488 tonnes – which saw it overtake Riesling to be the seventh-largest white variety nationally (Figure 4). Despite a 2 per cent decrease in crush, Muscat Gordo Blanco overtook Colombard due to the big reduction in the latter variety, while Semillon overtook both of them, jumping from sixth place to fourth place with a 16 per cent increase in crush size, most of it coming from Riverina.

This group of 10 made up 95 per cent of the total white crush in 2025, while the top three together accounted for 68 per cent.

Top 10 varieties – red

Most of the major reds increased, with Cabernet Sauvignon (up 40 per cent), Shiraz (up 23 per cent) and Pinot Noir (up 20 per cent) accounting for 96 per cent of the total net increase of 138,960 tonnes. The only varieties in the top 10 to decrease were Petit Verdot (down 26 per cent), Mataro/Mourvèdre (down 1 per cent) and Sangiovese (down 9 per cent).

Figure 4: Estimated crush of top 10 white varieties and year-on-year change

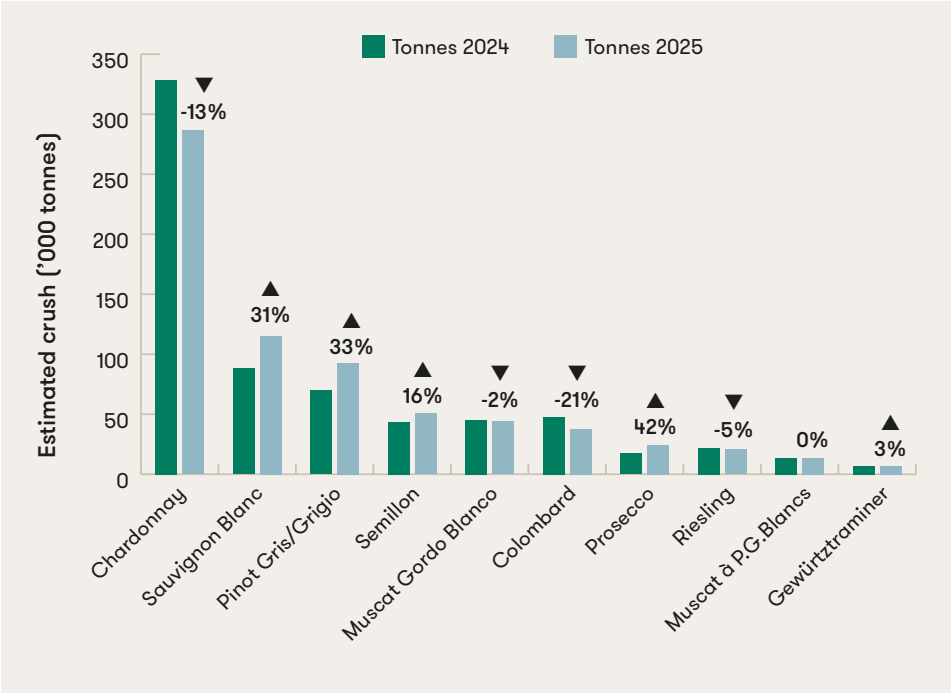
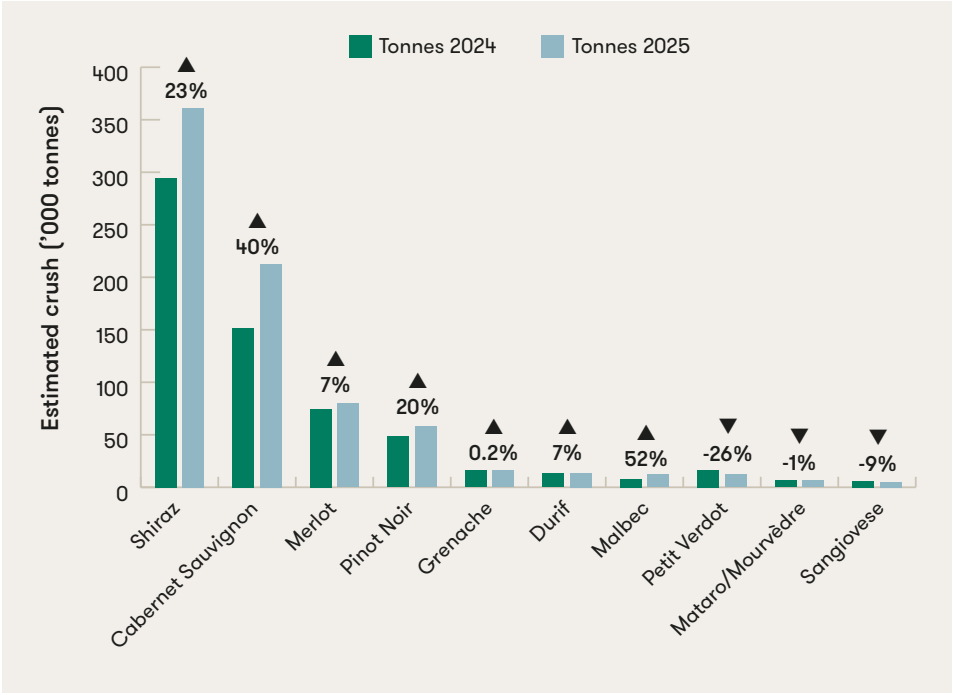


Figure 5: Estimated crush of top 10 red varieties and year-on-year change



After reducing by nearly 50,000 tonnes in 2024, Shiraz increased by 67,103 tonnes to 361,461 tonnes. Despite the increase, it was still the third-smallest crush of Shiraz since 2011 – excluding the past two record-low vintages in 2023 and 2024.

Ruby Cabernet decreased by 32 per cent and dropped out of the top 10, after reappearing at number 9 in 2024 with a 59 per cent increase in crush. It was replaced by Sangiovese, which squeaked in ahead of Tempranillo by just 49 tonnes (Figure 5).

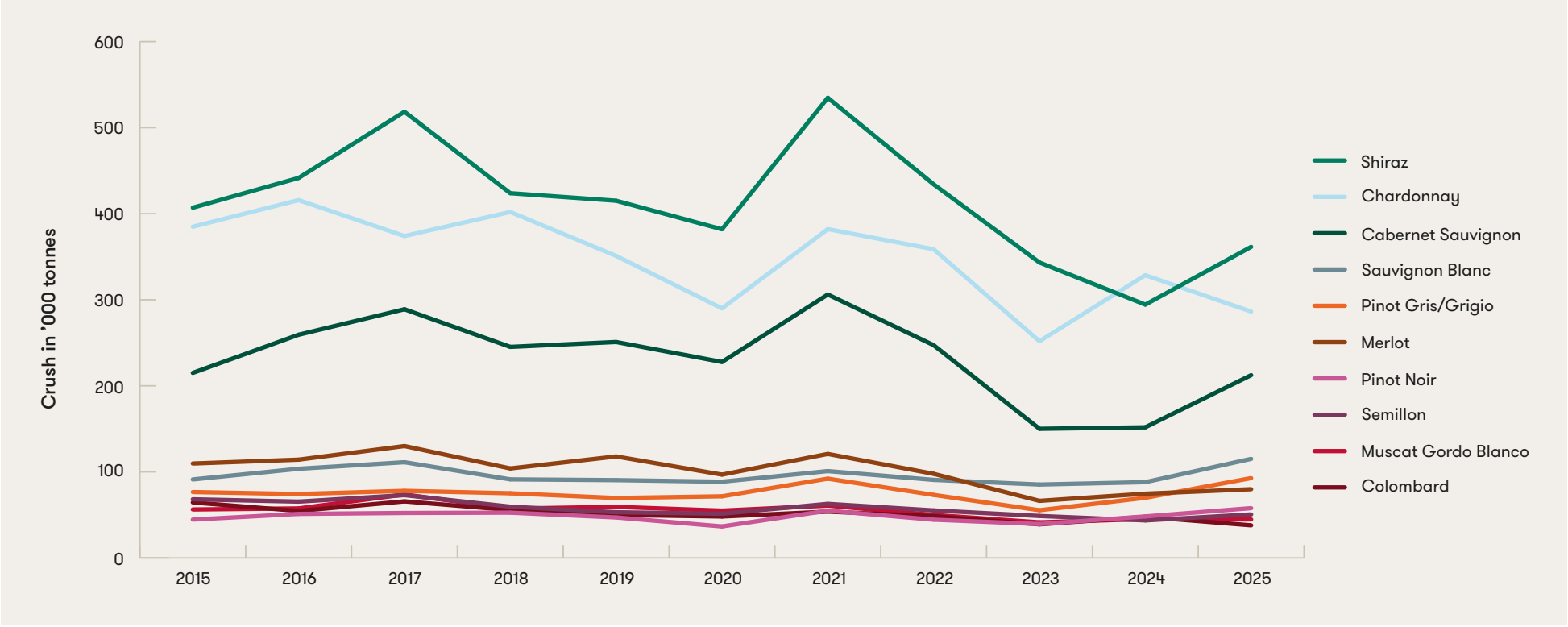
The top 10 reds accounted for 93 per cent of the red crush, up from 91 per cent in 2024.

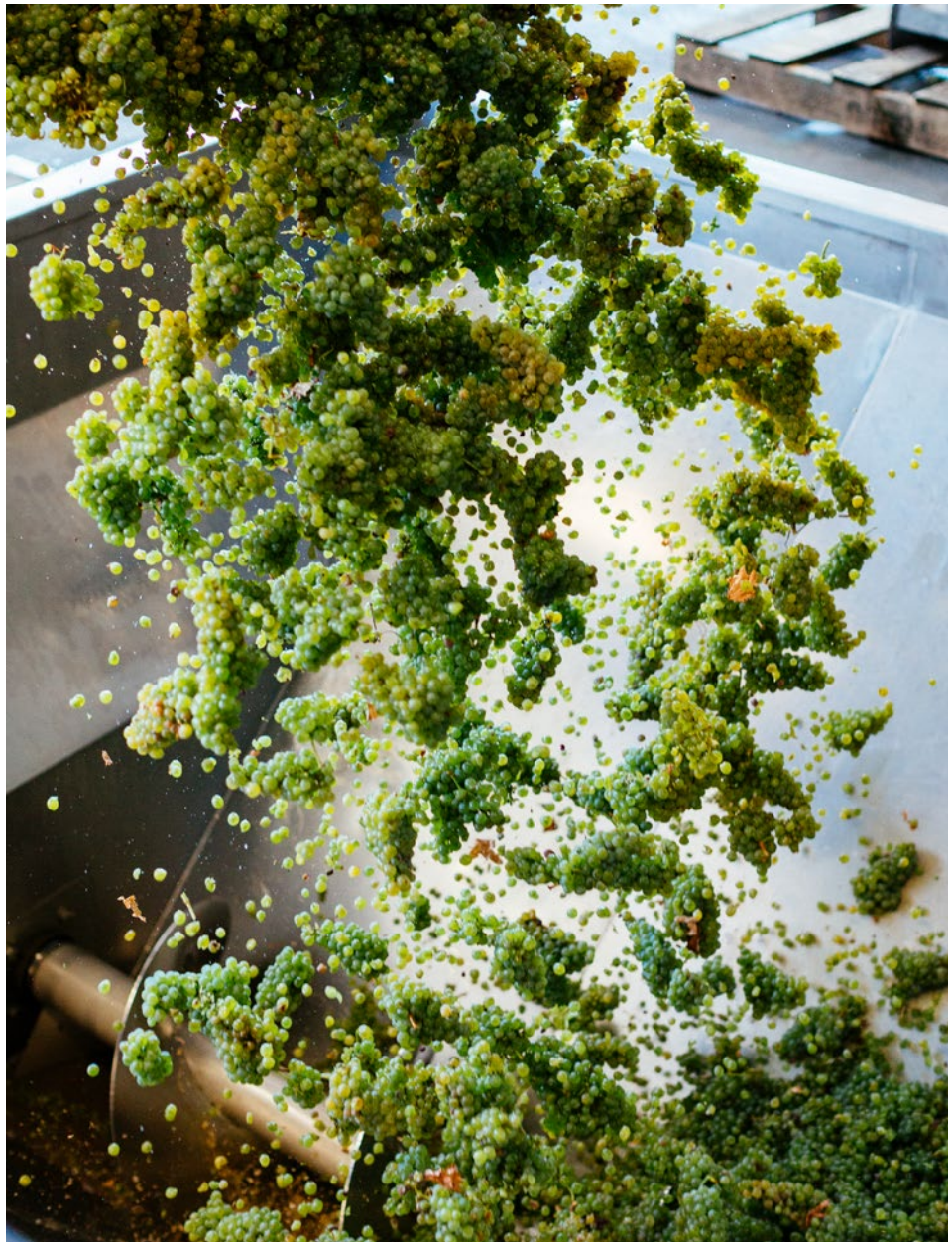
The top 10 reds and top 10 whites accounted for 94 per cent of the total estimated crush in 2025, up from 93 per cent in 2024.

The top 10 varieties overall comprised six whites and four reds. The composition did not change in 2025 compared with the previous year, but Chardonnay lost its briefly held number one position from 2024, while Pinot Gris/Grigio overtook Merlot for the first time, to take fifth position and give whites three of the top five positions for the first time. The top 10 varieties have not changed significantly for at least 10 years, falling into two distinct groups: the top three and the rest (Figure 6).

Details of all the major varieties can be found in table 4 on page 15.

Figure 6: Estimated crush of top 10 varieties over time





Other varieties

In addition to the top 10 reds and top 10 whites, respondents to the survey reported a further 67 red and 65 white varieties, accounting for the remaining 6 per cent of the crush (95,531 tonnes). Some of these are individually reported in the national and regional intake summary tables, while others are grouped under 'other red' or 'other white' because of their small volumes and/or small number of reporting wineries. Table 5 on page 16 provides more detail on the minor varieties crushed in Australia, as reported by respondents to the National Vintage Survey 2025. There are 55 varieties listed in table 4 that were reported by at least three different wineries. Total reported crush figures can be provided for these on request. There are a further 26 red and 31 white varieties reported by fewer than three wineries in 2025 – including some that are not identified by name. These are not listed individually, to protect the confidentiality of the respondents.

Vintage by state and region

South Australia (SA) accounted for the largest share of the national crush by size, with 747,688 tonnes (48 per cent). This was 8 per cent higher than the very low 2024 crush, but still 13 per cent below its 10-year average of 857,640 tonnes.

New South Wales (NSW) was the next largest, with a 31 per cent share of the crush by size (478,186 tonnes). This was in line with its 10-year average and 16 per cent larger than the 2024 crush.

The third-largest state by crush size was Victoria. The estimated crush from Victorian vineyards was 277,701 tonnes, up 13 per cent year-on-year and 1 per cent below its 10-year average.

These three states together accounted for 96 per cent of the crush (Figure 7).

Of the smaller states, Western Australia (WA) was the largest with an estimated 42,019 tonnes, 3 per cent higher than the previous year and 5 per cent above its 10-year average. For the second year in a row, Tasmania is estimated to have had a record crush – this time 18,764 tonnes, a further 12 per cent above the previous record of 16,804 tonnes in 2024. Two consecutive years of very good flowering conditions leading to increased yields, combined with ongoing new planting of vineyards, have seen the crush increase by 61 per cent in two years (since 2023).

The estimated crush from Queensland also increased slightly, up 1 per cent compared with 2024, but from a very small base. Variations in the response rate from year to year are likely to have a particularly large impact on the figures from these smaller states, including Queensland.

While the share of crush size by state has remained fairly constant over the past 10 years, the share of value has changed. In particular, SA has declined in value share from a peak of 62 per cent in 2016 to a low of 51 per cent in 2025. Correspondingly, NSW and Victoria have both increased their share of value, up from 31 per cent combined in 2016 to 36 per cent in 2025 (Figure 8). However, SA's share of crush value has remained higher than its share of the crush size, meaning that it has a higher overall average value than the other two large states.

Figure 7: Share of national crush and change in crush by state in 2025

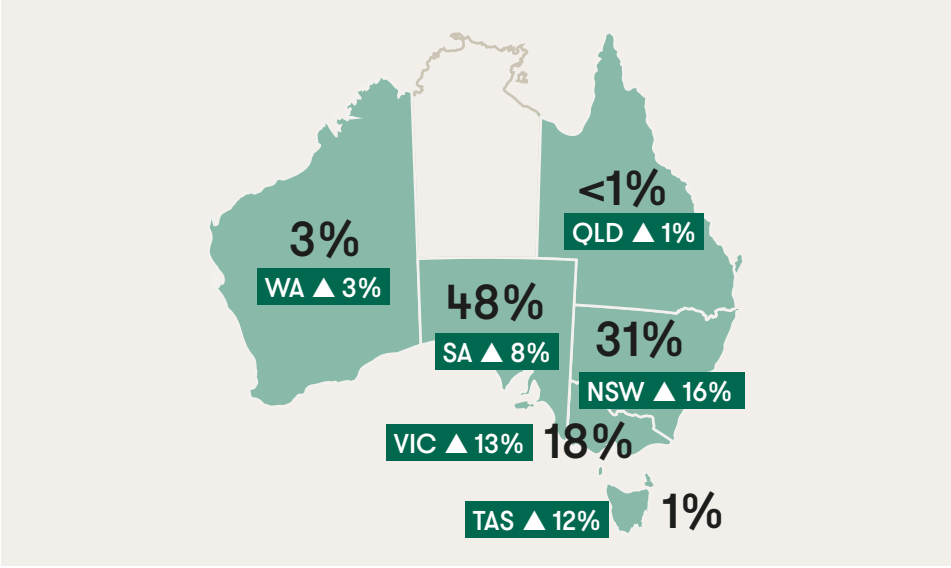
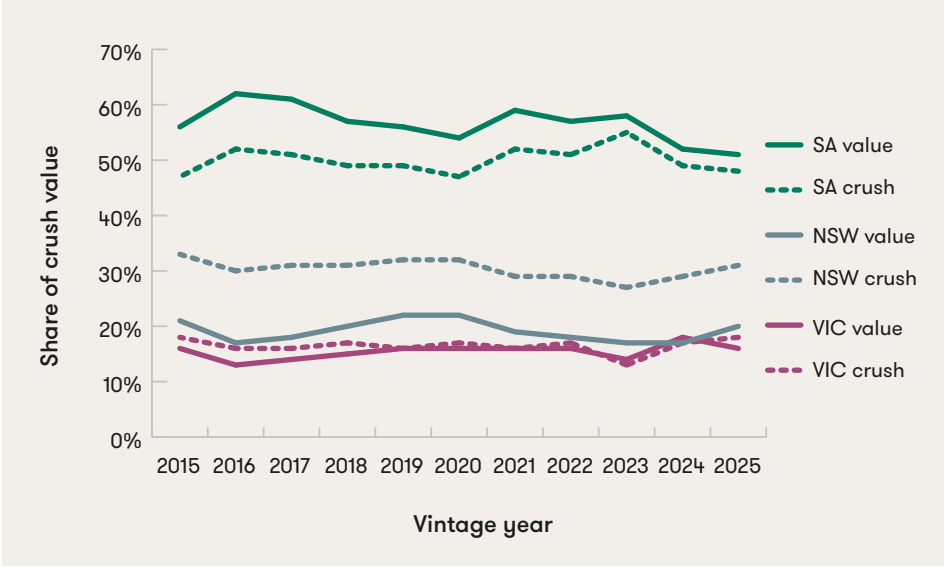


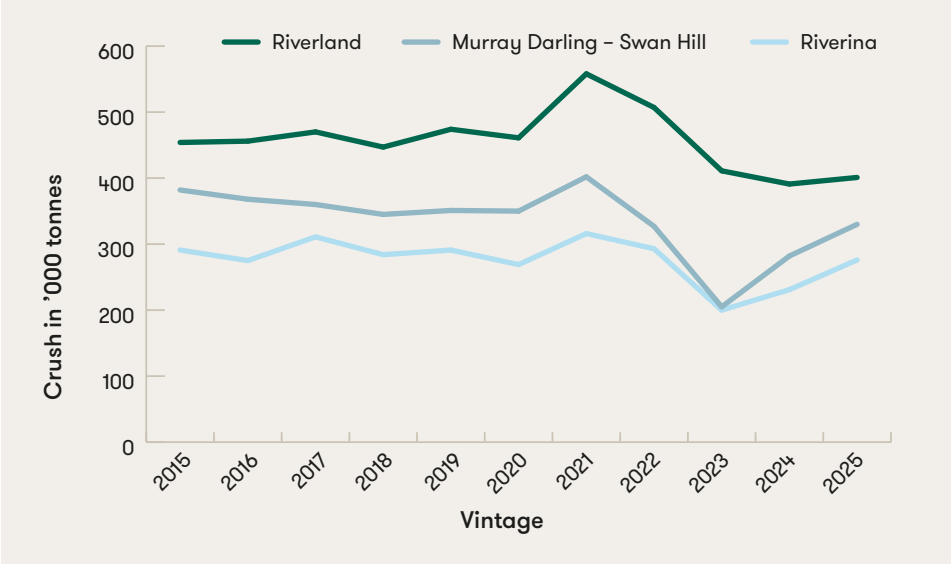
Figure 8: Share of crush size and value over time (largest 3 states)



The three large inland regions – Riverina (NSW), Murray Darling – Swan Hill (NSW and Vic) and the Riverland (SA) – together accounted for 70 per cent of the national crush, down slightly from their 10-year average (and 2024 share) of 72 per cent. The collected crush[6] from these inland regions combined was 1.01 million tonnes, 7 per cent below the 10-year average of 1.09 million tonnes but around 100,000 tonnes (11 per cent) higher than the previous year's crush of 909,039 tonnes.

The overall increase in the crush from the inland regions was driven by substantial increases from Murray Darling – Swan Hill (up 17 per cent) and the Riverina (up 19 per cent), combined with a small increase (3 per cent) in the crush from the Riverland. Despite the increases, all three regions crushed less than they did in 2015. After a period of very consistent vintages between 2015 and 2020, each region had an increase of 15 per cent or more in 2021, followed by decreases of 27–30 per cent between 2021 and 2024 (Figure 9).

Figure 9: Crush over time from the three major warm inland regions



6 Figures quoted at the regional level are the collected (reported) figures, not estimated figures (ie not raised by the non-response rate). See the method section for more details.

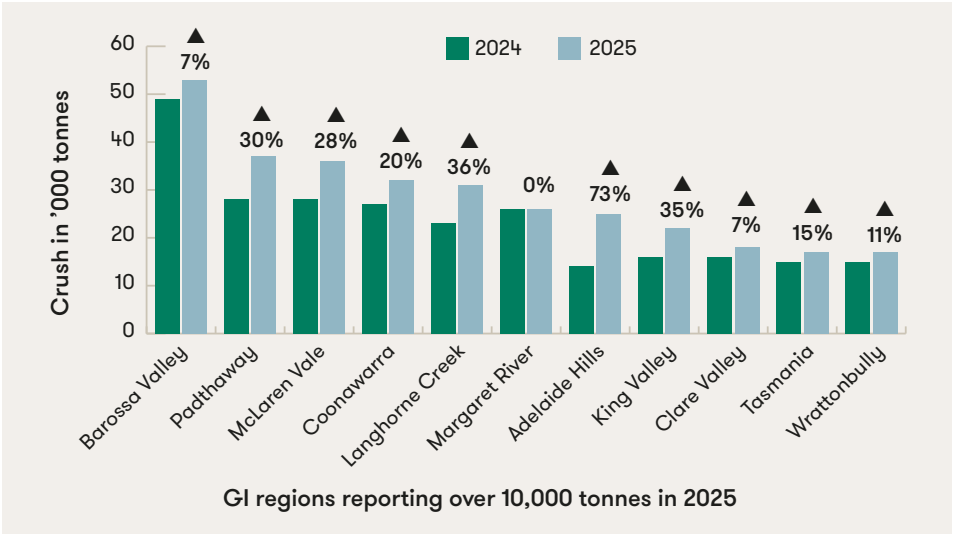
Crush from cool/temperate regions

Outside of the warm inland regions, there was a crush reported from a further 60 GI[7] regions and 14 other GI designations (zones) in 2025[8].

Of the 37 GI regions that reported a crush of over 1,000 tonnes, only four had a smaller reported crush in 2025 than in 2024[9]. Most regions reported double-digit increases, indicating widespread improvements in growing conditions and/or requirement for grapes. The largest 11 regions (all those with a crush over 10,000 tonnes) had a combined increase of 21 per cent in tonnes crushed and accounted for 22 per cent of the national crush. Of this group, the Adelaide Hills had the largest increase (up 73 per cent) followed by Langhorne Creek (up 36 per cent) and King Valley (up 35 per cent) – see Figure 10.

Details of the reported crush by state and region can be found in table 6 on pages 17–19.

Figure 10: Crush for largest cool / temperate regions in 2025 and year-on-year change



7 Geographical Indication

8 Tasmania is classified as a GI region as well as a state, and Gippsland is included as a region by convention, although it is in fact a GI zone.

9 Eden Valley, Goulburn Valley, Rutherglen and Pemberton.

Crush and value of purchased grapes

In 2025, there were 25,623 separate batches of purchased grapes reported in the National Vintage Survey by 455 different respondents, comprising a total of 1,019,037 tonnes with a value of $620.5 million[10].

The weighted average value calculated across all purchased grapes[11] was $604 per tonne, down by $10 per tonne (1 per cent) compared with 2024.

The reduction in the overall average purchase value was the result of a decrease in the average purchase value for both red and white grapes from cool / temperate regions, offsetting increases in the average purchase value for both red and white grapes from warm inland regions. These increases were despite substantial increases in tonnes for the warm inland regions – particularly for reds (see Table 1). However, it should be noted that the increase in average value can relate to factors such as a change in the varietal mix (e.g. a higher proportion of more highly priced varieties), yield caps or contract arrangements that predate the current vintage.

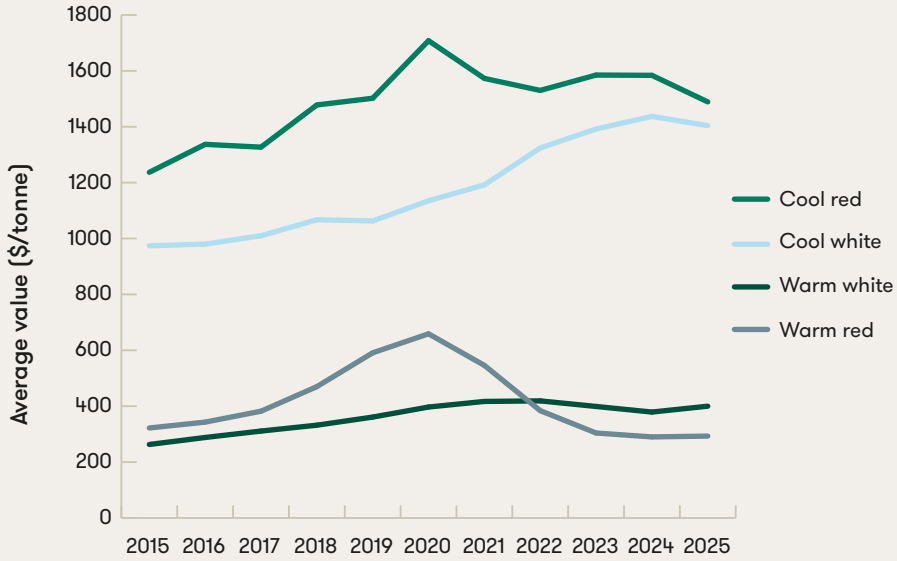
Table 1: Average value and year-on-year changes for grapes by source and colour

		Average value ($/tonne)		Change in average value YoY	10-year average (2015–2024)	Change in reported tonnes purchased
		2024	2025			
Cool/ temperate	Red	1584	1489	-6%	1471	22%
	White	1437	1404	-2%	1147	20%
	Total	**1533**	**1460**	**-5%**	**1366**	**21%**
Warm inland	Red	290	293	1%	442	40%
	White	379	400	6%	353	4%
	Total	**344**	**351**	**2%**	**394**	**18%**
All regions	**Total**	**614**	**604**	**-1%**	**612**	**18%**

The average value for cool / temperate whites decreased by 2 per cent in 2025 after reaching a new record of $1437 per tonne in 2024. The average value for reds from cool / temperate regions decreased by 6 per cent to $1489 per tonne – the lowest figure since 2018.

Across the warm inland regions, the average value for reds saw a small increase of 1 per cent to $293 per tonne, which was still 32 per cent below the 10-year average and 55 per cent below the peak of $659 per tonne in 2020. The average value for white grapes increased by 6 per cent to $400 per tonne, which was 12 per cent above the 10-year average and 4 per cent below its peak of $419 per tonne in 2022. For the fourth year in a row, the average value for inland whites was higher than for reds (Figure 11).

Figure 11: Average winegrape purchase value by source and colour 2015–2025



10 Note: the figures in this section have not been raised to allow for the non-response rate.

11 Excluding any where the price paid was not provided

Average values for major inland varieties

The top three red and top three white varieties across the three inland regions – Cabernet Sauvignon, Merlot, Shiraz, Chardonnay, Pinot Gris/Grigio and Sauvignon Blanc – together accounted for 57 per cent of all grapes purchased in 2025.

The average value increased year-on-year for each of these varieties – with the exception of Sauvignon Blanc, which decreased by 1 per cent. This was despite significant increases in the tonnes purchased for all these varieties except Chardonnay (down 14 per cent) – see Table 2.

Table 2: Average value for warm inland major varieties and year-on-year change in crush and average value

Variety	Average value 2024	Average value 2025	Change in average value	Change in tonnes purchased
Cabernet Sauvignon	241	264	9%	63%
Merlot	279	286	2%	26%
Shiraz	249	257	3%	46%
Chardonnay	372	394	6%	-14%
Pinot Gris/Grigio	461	491	7%	37%
Sauvignon Blanc	496	492	-1%	42%

Total crush value

The value of the crush is determined based on the value of purchased grapes. The winegrape batches reported in the National Vintage Survey are classified as either 'winery grown' – i.e. grown by the winery that crushed them, or 'purchased' – i.e. bought from an independent third party[12].

In 2025, it is estimated that winery grown grapes accounted for 29 per cent of the crush, compared with 32 per cent in 2024, and increased by 2 per cent, whereas the crush of purchased grapes increased by an estimated 15 per cent.

An analysis of the prices paid for purchased grapes enables an estimation to be made of the value of the grapes at a region–variety level, which in turn can be aggregated to a regional or national level. Winery grown grapes are assigned the same value as purchased grapes of the same region–variety combination.

Based on this analysis, the total value of the winegrape crush in 2025 is estimated[13] to be $1.13 billion. The overall average value across all grapes, winery-grown and purchased, was $722 per tonne, which was 2 per cent higher than the figure in 2024, as a result of the increased share of reds and cool / temperate grapes in the overall mix.

12 This could be an independent grapegrower or another winery choosing to sell some grapes from its own vineyards

13 Including the non-response share

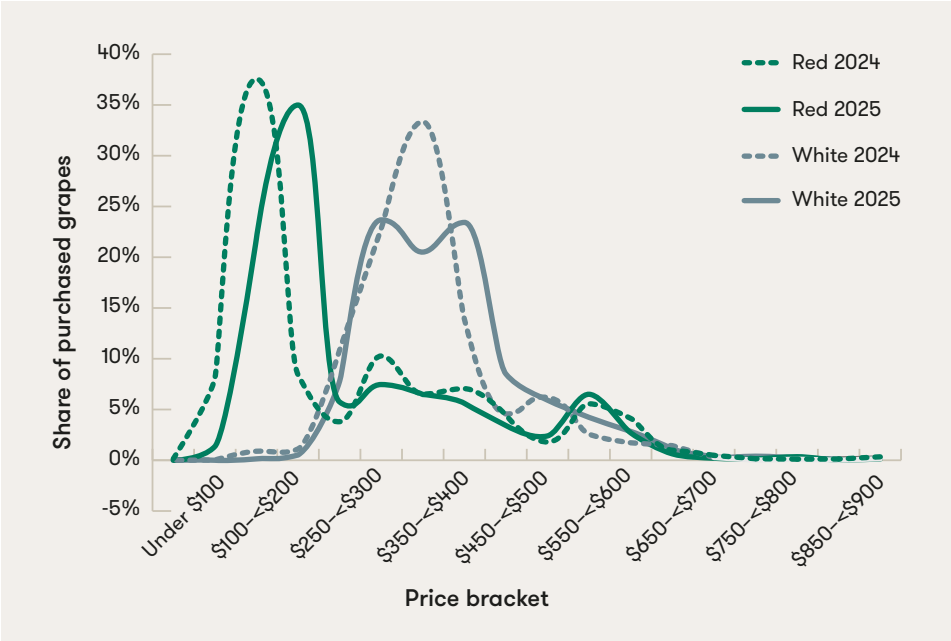
Price dispersion

Warm inland

The range (dispersion) of prices paid can be determined from an analysis of the batch data. Each individual batch is assigned to a price segment and the amount and share purchased in each segment is calculated.

The distribution of prices for warm inland grapes generally showed an upward shift in 2025. For reds, there was an increase in the percentage purchased at between $200–$300 per tonne (up from 12 per cent in 2024 to 41 per cent in 2025) and a corresponding decrease in the percentage purchased at <$200 per tonne (down from 46 per cent in 2024 to 23 per cent). This reversed the result in 2024 for these lowest price brackets and saw them return to the approximate distribution of 2023. However, nearly two-thirds of purchases of inland red grapes (64 per cent) in 2025 were at below $300 per tonne (Figure 12).

Figure 12: Price dispersion for warm inland purchased grapes 2024 vs 2025



In the case of whites, the share of grapes purchased at $400 and above increased from less than one-third (31 per cent) to nearly half (47 per cent). By comparison, only 22 per cent of red grapes were purchased at $400 and above.

The chart shows clearly the difference in the distribution of prices paid for red compared with white varieties, which has reversed since 2021.

Cool temperate

There was very little change in the price dispersion for the cool / temperate purchased grapes, except for a slight increase in the share of reds purchased at below $600 per tonne (up from 5 per cent to 11 per cent) at the expense of the categories above $600 per tonne. The dispersion for reds and whites is quite similar in 2025, except for a greater share of reds being purchased at > $1500 per tonne compared with whites (41 per cent compared with 33 per cent) – see Figure 13.

Figure 13: Price dispersion for cool / temperate purchased grapes 2024 vs 2025

Crush by winery size and business model

In 2025, there were 746 respondents to the National Vintage Survey, an increase of 33 respondents (5 per cent) compared with the previous record response number of 713 in 2024. There were a further 83 who reported a zero crush for the 2025 vintage, making an overall 42 per cent response rate out of 1980[14] eligible businesses who received the survey invitation.

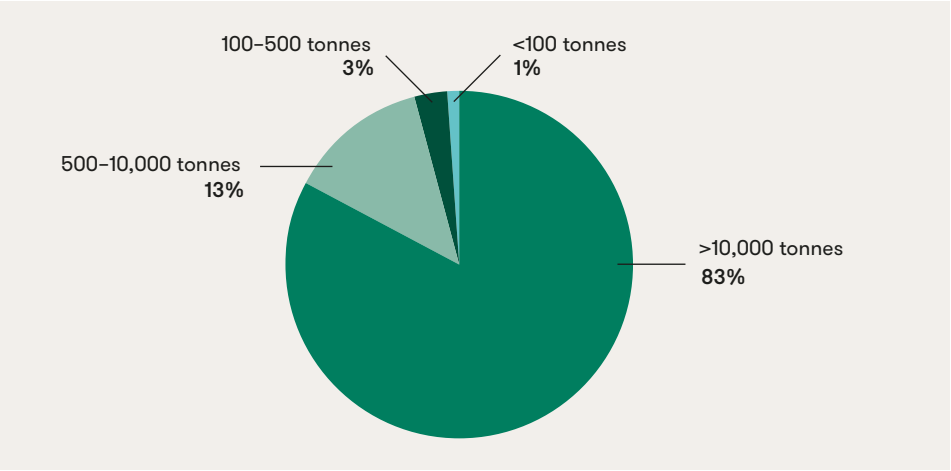
Overall, a total of 1,439,276 tonnes was reported to the National Vintage Survey in 2025. It is estimated that the tonnes reported accounted for 92 per cent of the total Australian winegrape crush in 2025[15], up from 89 per cent in 2024 and a record since the National Vintage Survey started in 2015. However, it should be noted that the response rate is uneven across regions, with higher non-response rates generally in smaller regions with a lower percentage of purchased fruit.

Wine Australia would like to acknowledge and thank the wine businesses that took the time to respond to the survey. The contribution of all wineries is very important to the accuracy of the report in providing a picture of the distribution, value and changes in the crush by variety in Australia.

Of the 746 respondents, there were 291 (39 per cent) that only reported crushing their own grapes, while 126 (17 per cent) only reported purchased grapes – i.e. did not crush any own grown fruit. The remaining 329 (44 per cent) had a mix of own grown and purchased fruit. This group accounted for 85 per cent of the crush.

Respondents were classified into size categories based on their crush. There were 21 respondents from the largest size category (>10,000 tonnes), accounting for 3 per cent of respondents and 83 per cent of the reported crush, while there were 473 respondents from the smallest size category (<100 tonnes), accounting for 63 per cent of the responses and 1 per cent of the crush (Figure 14).

Figure 14: Share of reported crush by winery size category



Based on the responses to the survey and other sources, the estimated population of wineries by size category in the Australian wine sector is as shown in Table 3.

Table 3: Estimated number of Australian wine businesses by size category in 2025

Crush (tonnes)	Approximate 9-litre case equivalent	Respondents 2025	Est total wineries
<10	<1,000	143	550
10–100	1,000–5,000	330	1050
100–250	5000–20,000	111	180
250–500	20,000–50,000	51	75
500–1000	50,000–100,000	33	40
1000–6000	100,000–500,000	50	55
>6000	>500,000	28	30
Total		**746**	**1980**

14 Of the 2042 businesses initially sent a survey, 62 reported that they do not crush grapes or were no longer in business.

15 See Method section

Table 4: Estimated crush by variety in 2025

Variety	Estimated tonnes	Per cent change in estimated tonnes	Share of national crush	Estimated value all grapes
Red				
Barbera	501	22%	0%	611,751
Cabernet Franc	735	-4%	0%	1,132,679
Cabernet Sauvignon	212,367	40%	14%	145,495,070
Durif	13,867	7%	1%	5,989,729
Graciano	204	-49%	0%	329,820
Grenache	16,055	0%	1%	20,992,805
Lagrein	192	146%	0%	195,091
Malbec	12,236	52%	1%	9,785,330
Mataro/Mourvedre	6,360	-1%	0%	8,005,837
Merlot	79,858	7%	5%	32,637,933
Montepulciano	1,015	-12%	0%	1,008,741
Muscat à Petits Grains Rouges	1,268	10%	0%	985,872
Nebbiolo	352	4%	0%	1,011,121
Nero d'Avola	1,369	49%	0%	1,403,370
Other red	41,222	-8%	3%	20,582,904
Petit Verdot	12,040	-26%	1%	3,077,187
Pinot Meunier	781	10%	0%	2,102,261
Pinot Noir	57,834	20%	4%	109,802,977
Ruby Cabernet	4,995	-32%	0%	1,418,997
Sangiovese	5,312	-9%	0%	5,757,451
Shiraz	361,461	23%	23%	271,996,649
Tempranillo	5,263	35%	0%	5,410,260
Touriga Nacional	672	3%	0%	863,217
Red Total	**835,958**	**20%**	**53%**	**650,597,052**

Variety	Estimated tonnes	Per cent change in estimated tonnes	Share of national crush	Estimated value all grapes
White				
Chardonnay	286,282	-13%	18%	195,675,955
Chenin blanc	2,981	-6%	0%	2,086,529
Colombard	37,846	-21%	2%	11,100,467
Fiano	4,828	86%	0%	3,716,571
Gewürztraminer	6,920	3%	0%	2,920,412
Grüner Veltliner	357	39%	0%	737,606
Marsanne	1,078	47%	0%	1,058,800
Muscat à Petits Grains Blancs	13,397	0%	1%	4,609,289
Muscat Gordo Blanco	44,085	-2%	3%	14,224,157
Other white	13,646	13%	1%	8,513,310
Pinot Gris/Grigio	92,714	33%	6%	70,743,436
Prosecco	24,488	42%	2%	22,089,228
Riesling	20,810	-5%	1%	27,163,025
Roussanne	527	6%	0%	452,490
Sauvignon Blanc	115,110	31%	7%	82,270,409
Semillon	50,563	16%	3%	24,709,622
Verdelho	6,275	12%	0%	3,689,456
Vermentino	2,246	53%	0%	1,576,714
Viognier	5,025	18%	0%	3,233,872
White Total	**729,177**	**2%**	**47%**	**480,571,347**
Grand Total	**1,565,135**	**11%**	**100%**	**1,131,168,400**

Table 5: Varieties outside the top 10 reds and whites reported in the National Vintage Survey 2025

These varieties were outside the top 10 for each colour but reported individually in the regional summary tables.

Reds	Whites
Barbera	Chenin Blanc
Cabernet Franc	Fiano
Graciano	Grüner Veltliner
Lagrein	Marsanne
Montepulciano	Roussanne
Muscat à Petits Grains Rouges	Verdelho
Nebbiolo	Vermentino
Nero d'Avola	Viognier
Pinot Meunier	
Ruby Cabernet	
Tempranillo	
Touriga Nacional	

Varieties grouped as 'other' in regional intake summary reports but which have at least three wineries reporting them in total.[16]

Other reds		Other whites
Aglianico	Trousseau	Albarino
Alicante Bouschet	Zinfandel/Primitivo	Arinto
Carignan		Arneis
Carmenère		Canada Muscat
Chambourcin		Clairette
Cinsaut		Falanghina
Colorino		Garganega
Counoise		Greco
Dolcetto		Grenache Blanc
Gamay		Grenache Gris
Isabella		Grillo
Lambrusco Maestri		Gros Manseng
Marzemino		Inzolia
Mencia		Moscato Giallo
Mondeuse		Muscadelle
Muscat Hamburg		Orange Muscat
Negroamaro		Other white
Other red		Palomino
Rubired		Pecorino
Sagrantino		Pedro Ximenez
Saperavi		Picpoul
Souzao		Pinot blanc
Tannat		Savagnin
Teroldego		Trebbiano
Tinta Amarela		Verdejo
Tinta Barroca		Verduzzo
Tinta Câo		

16 There are a further 26 red and 31 white varieties reported by at least one winery in 2025 – including some that are not identified by name. These are not identified, to protect the confidentiality of the respondents.

Table 6: Crush by state and region 2025 (collected tonnes)

State and region	Tonnes purchased	Tonnes own grown	Total tonnes	Share winery grown	Share of national crush	# respondents
New South Wales	**338,905**	**100,827**	**439,733**	**23%**	**31%**	**147**
Big Rivers zone other	1,027	-	1,027	0%	0.1%	2
Canberra District	133	608	742	82%	0.1%	15
Central Ranges zone other	263	504	767	66%	0.1%	8
Cowra	1,977	62	2,038	3%	0.1%	4
Gundagai	5,735	28	5,763	0%	0.4%	8
Hastings River	-	0	0	100%	0.0%	1
Hilltops	437	9	446	2%	0.0%	25
Hunter	1,677	3,959	5,635	70%	0.4%	55
Mudgee	1,120	781	1,901	41%	0.1%	17
Murray Darling - Swan Hill NSW	74,725	65,735	140,460	47%	10%	22
New England Australia	-	31	31	100%	0.0%	1
Orange	454	3,586	4,040	89%	0.3%	35
Perricoota	659	-	659	0%	0.0%	2
Riverina	250,233	25,415	275,648	9%	19.2%	12
Shoalhaven Coast	6	47	53	89%	0.0%	3
South Coast zone other	-	6	6	100%	0.0%	1
Southern NSW zone other	-	2	2	100%	0.0%	1
Tumbarumba	460	54	514	11%	0.0%	18
Queensland	**64**	**650**	**715**	**91%**	**0.0%**	**19**
Granite Belt	63	590	653	90%	0.0%	16
Queensland zone other	-	56	56	100%	0.0%	2
South Burnett	1	4	5	80%	0.0%	2
South Australia	**484,127**	**203,437**	**687,564**	**30%**	**47.8%**	**311**
Adelaide Hills	15,230	9,533	24,763	38%	1.7%	113
Adelaide Plains	1,648	19	1,667	1%	0.1%	10
Barossa Valley	33,621	19,479	53,100	37%	3.7%	105
Barossa zone other	2	491	493	100%	0.0%	3
Clare Valley	8,077	9,502	17,579	54%	1.2%	44

Table 6: Crush by state and region 2025 (collected tonnes) (continued)

State and region	Tonnes purchased	Tonnes own grown	Total tonnes	Share winery grown	Share of national crush	# respondents
Coonawarra	9,687	22,769	32,457	70%	2.3%	37
Currency Creek	3,953	1,563	5,516	28%	0.4%	18
Eden Valley	3,179	3,164	6,343	50%	0.4%	51
Fleurieu zone other	905	-	905	0%	0.1%	4
Kangaroo Island	31	127	159	80%	0.0%	5
Langhorne Creek	21,566	9,902	31,467	31%	2.2%	43
Limestone Coast zone other	8,330	798	9,128	9%	0.6%	17
Lower Murray zone other	3,114	76	3,190	2%	0.2%	7
McLaren Vale	22,055	14,049	36,104	39%	2.5%	112
Mount Benson	1,493	1,996	3,489	57%	0.2%	8
Mount Gambier	827	26	853	3%	0.1%	13
Mount Lofty Ranges zone other	239	24	264	9%	0.0%	4
Padthaway	29,477	7,400	36,878	20%	2.6%	16
Riverland	310,405	91,054	401,459	23%	27.9%	47
Robe	83	3,919	4,002	98%	0.3%	4
Southern Fleurieu	59	35	94	37%	0.0%	4
Southern Flinders Ranges	442	-	442	0%	0.0%	3
The Peninsulas	250	37	287	13%	0.0%	4
Wrattonbully	9,453	7,474	16,927	44%	1.2%	23
Tasmania	**3,830**	**13,425**	**17,255**	**78%**	**1.2%**	**16**
Tasmania	3,830	13,425	17,255	78%	1.2%	16
Victoria	**173,224**	**82,146**	**255,370**	**32%**	**18%**	**228**
Alpine Valleys	2,542	171	2,713	6%	0.2%	16
Beechworth	295	376	671	56%	0.0%	9
Bendigo	1,246	177	1,423	12%	0.1%	13
Central Victoria zone other	-	3,547	3,547	100%	0.2%	1
Geelong	419	934	1,353	69%	0.1%	15
Gippsland	104	267	371	72%	0.0%	9
Glenrowan	2	759	761	100%	0.1%	3

Table 6: Crush by state and region 2025 (collected tonnes) (continued)

State and region	Tonnes purchased	Tonnes own grown	Total tonnes	Share winery grown	Share of national crush	# respondents
Goulburn Valley	1,931	2,667	4,598	58%	0.3%	11
Grampians	230	1,622	1,853	88%	0.1%	10
Heathcote	6,917	939	7,856	12%	0.5%	41
Henty	22	394	415	95%	0.0%	3
King Valley	11,804	10,322	22,126	47%	1.5%	33
Macedon Ranges	63	346	409	85%	0.0%	21
Mornington Peninsula	446	2,053	2,500	82%	0.2%	37
Murray Darling – Swan Hill VIC	142,764	46,397	189,161	25%	13%	30
North East Victoria zone other	15	134	148	90%	0.0%	4
Port Phillip zone other	-	10	10	100%	0.0%	2
Pyrenees	55	1,412	1,467	96%	0.1%	15
Rutherglen	414	1,858	2,272	82%	0.2%	19
Strathbogie Ranges	316	1,637	1,953	84%	0.1%	4
Sunbury	-	19	19	100%	0.0%	1
Upper Goulburn	560	100	660	15%	0.0%	5
Western Victoria zone other	83	20	103	20%	0.0%	5
Yarra Valley	2,997	5,985	8,982	67%	0.6%	42
Western Australia	**18,886**	**19,754**	**38,640**	**51%**	**2.7%**	**116**
Blackwood Valley	893	191	1,084	18%	0.1%	7
Central Western Australia	3	4	7	62%	0.0%	1
Eastern Plains, Inland and North of WA	-	2	2	100%	0.0%	1
Geographe	1,041	768	1,810	42%	0.1%	23
Great Southern	3,464	2,690	6,155	44%	0.4%	31
Manjimup	2	120	122	98%	0.0%	3
Margaret River	12,784	12,877	25,661	50%	1.8%	75
Pemberton	509	1,128	1,637	69%	0.1%	12
Perth Hills	37	46	83	55%	0.0%	3
Swan District	152	1,928	2,080	93%	0.1%	17
Grand Total	**1,019,037**	**420,240**	**1,439,276**	**29%**	**100.0%**	**746**

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.

Wine grapes levy payers (approximately 2,000 businesses) are sent a request for crush data in late April. Wine Tasmania conducts the survey in Tasmania in collaboration with Wine Australia to ensure alignment of results and to minimise survey load on wineries.

Respondents are 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.

In 2025, responses were received from 746 businesses[16], including all wineries known to have crushed over 10,000 tonnes. This represented a response rate of 42 per cent of eligible entities that received a survey invitation. The reported (collected) tonnage is estimated to account for 92 per cent of all winegrapes crushed in 2025 (a record response).

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 Fisheries and Forestry (DAFF) 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[17]. 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 DAFF figure[18] for the previous vintage to provide an estimate for the current vintage.

2025 estimated crush calculation

Change in crush from respondents who responded in both 2024 and 2025	11.0%
DAFF figure for 2024	1,409,566 tonnes
Calculation: 1,409,566 × (1 + 0.11) = 1,565,135	
Wine Australia estimated crush for 2024	1,565,135 tonnes

Reconciliation of crush estimate in 2024

Wine Australia estimate in 2024 survey	1,427,008 tonnes (June 2024)
DAFF figure for 2024	1,409,566 tonnes (as at June 2025)

The Wine Australia estimate for the 2024 crush was within 1.2 per cent of the DAFF figure for levy returns from the 2024 vintage, as at June 2025.

It should be noted that the 2024 figures reported in this 2025 report will vary slightly from what was reported last year, as they have been adjusted based on using the updated DAFF recorded figure for 2024 and incorporating late responses and data corrections.

16 Plus a further 83 that reported crushing zero tonnes in 2025

17 The tonnage collected from this group is 96% of the total collected crush in 2025 and 88 per cent of the estimated crush

18 In fact, the DAFF figure can continue to change for many months as late returns are received. The latest available figure is used in this calculation, which is from June 2025.

Notes on the calculation of average value and valuation of own grown fruit

The average value is calculated at the variety/region level by dividing the total amount paid for all purchased grapes of that variety/region by the tonnes for which purchase value is provided.

Where tonnes purchased have been reported without a price attached, these tonnes are not included in the calculation of the average price for that variety.

The value of own 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 own grown fruit, by definition, does not have a commercial purchase value.

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 regional intake summary reports to protect confidentiality. However, the calculated value is included in the total purchase value for red and white varieties overall.

Please direct any questions on this report's method and data to Peter Bailey Manager, Market Insights at Wine Australia: peter.bailey@wineaustralia.com.

Wine Australia

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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Disclaimer

About Wine Australia

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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 R&I investments.