

Wine
Australia



National Vintage Report 2026



At a glance summary

- The 2026 Australian winegrape crush is estimated¹ to be 1.27 million tonnes, 19 per cent lower than the 2025 vintage of 1.57 million tonnes² and the smallest in more than 25 years (since 2000).
- The very low crush in 2026 is believed to be a result of market conditions as well as climate and seasonal factors.
- The crush of red varieties decreased by 29 per cent to an estimated 596,226 tonnes, the lowest since 2000 and 35 per cent below its 10-year average.
- The crush of white grapes declined by 9 per cent to an estimated 669,445 tonnes, to be 14 per cent below its 10-year average and the second-smallest crush of white grapes in the past 20 years.
- White grapes accounted for 53 per cent of the total crush – up six percentage points from 2025 to its highest share since 2012 and only the second time since 2014 that it has had the majority share of the crush.
- There were double-digit declines for all the top 10 red varieties, with Shiraz and Malbec down the most (35 per cent each) and Petit Verdot the least (down 13 per cent).
- The Shiraz crush decreased by 35 per cent to fall to a 19 per cent share of the national crush – the first time in 15 years that its share has dropped below 20 per cent.
- Overall, the top 10 whites declined by 8 per cent, despite Chardonnay remaining almost identical to 2025. The largest decreases were in Semillon (down 32 per cent) and Colombard (down 21 per cent). Only Muscat à Petits Grains Blanc increased (up by 1 per cent).
- Chardonnay was the largest single variety by crush size in 2026, overtaking Shiraz. The crush of Chardonnay was almost identical to its 2025 figure but its share of the national crush increased to 23 per cent.
- The largest contributor to the crush was South Australia (SA), with an estimated crush of 658,087 tonnes, down 12 per cent compared with 2025. The reduction was less than for other states, leading to SA increasing its share of the national crush by 4 percentage points to 52 per cent at the expense of New South Wales (NSW) and Victoria.
- Purchased grapes accounted for 66 per cent of the crush and decreased by 29 per cent in tonnage, while winery-grown grapes accounted for 34 per cent and decreased by 10 per cent.
- The national weighted average value for purchased grapes was \$570 per tonne, down by \$34 per tonne (6 per cent) compared with 2025.
- The total estimated value of the 2026 vintage was \$837 million – down 26 per cent (nearly \$300 million) compared with 2025.

1. Based on responses to the National Vintage Survey 2026 and scaled up to account for non-responses

2. Department of Agriculture, Fisheries and Forestry (DAFF), June 2026

Overview of the 2026 winegrape crush

The 2026 Australian winegrape crush is estimated³ to be 1.27 million tonnes, the smallest in more than 25 years (since 2000).

The crush was 19 per cent lower than the 2025 vintage of 1.57 million tonnes and 25 per cent below the 10-year average (2016–2025) of 1.69 million tonnes (Figure 1).

Figure 1: Australian winegrape crush 2016–2026



3. Based on responses to the National Vintage Survey 2026 and scaled up to account for non-responses





Vintage conditions

The very low crush in 2026 highlights the combined impact of challenging market conditions and seasonal factors on production.

From a seasonal perspective, Australia experienced its fourth warmest year on record in 2025, with the national average temperatures 1.2°C above the 1961–1990 historical average. While annual national rainfall was 8 per cent higher than the 1961–1990 average, most wine-growing regions – including Tasmania, Victoria, South Australia, inland NSW and southern Western Australia (WA) – recorded below-average rainfall, with the increased rainfall concentrated in Queensland, northern WA and the Northern Territory.

Seasonal events during the growing season varied widely across regions, vineyards and months. National Vintage Survey respondents reported a wide range of significant challenges including late spring frosts, heatwaves, drought, hail and/or flooding. Yields were commonly reported to be below average as a result of one or more of these events.

Another common experience was that the 2025–26 season was long and late, with some regions still picking into June. Coonawarra reported having had the latest harvest since the 1970s.

At the same time, smaller berries, lower bunch weights and slower ripening were frequently associated with good flavour concentration, colour and structure, and some regions reported outstanding vintages despite the broader challenges.

Alongside seasonal pressures, respondents' comments pointed to serious market and financial strain. Many respondents identified issues impacting their businesses around oversupply, weak demand, low prices, cancelled or delayed contracts and grapes left unpicked, particularly for red varieties.

The National Vintage Survey cannot capture how many vineyards were left unharvested, as it only collects information from wineries on grape intake. Australia doesn't have a complete, up-to-date register of what is planted across its winegrape vineyards. Without this information, it is not possible to determine how much of the decline in production is due to reduced vineyard area versus other influences such as yield caps, unsold / unharvested grapes, resting vineyards or climate and seasonal effects. The National Vineyard Register project currently being undertaken by Wine Australia with funding from DAFF is expected to address this gap by building and populating a comprehensive register of all grapevine plantings across Australia.

In addition to this uncertainty, the survey response rate in 2026 was lower than usual, with 667 respondents reporting a crush compared with 751 respondents in 2025. This could be due to a reduction in the number of businesses crushing grapes, as suggested by anecdotal reports, but could also indicate a reduced capacity or willingness among struggling businesses to participate in the voluntary survey. While this does not affect the estimated crush figure at a national level, the increased non-response rate may account for some of the decrease in the reported crush at a regional level compared with 2025.

Vintage by colour and variety

Overall, the 2026 crush was 306,334 tonnes smaller than 2025, with red varieties accounting for 80 per cent of the decrease. This reverses the result seen in 2025 when the crush increased by 167,924 tonnes, driven largely by red varieties (87 per cent of the growth).

After increasing by 21 per cent in 2025, the crush of red varieties⁴ decreased by 243,560 tonnes (-29 per cent) in 2026 to an estimated 596,226 tonnes, the lowest since 2000 and 16 per cent smaller than the well below-average vintage of 2023. Conversely, the crush of white grapes declined by a more modest 62,774 tonnes (-9 per cent) to 669,445 tonnes. While still the second-smallest crush of white grapes in the past 20 years, it was 12 per cent higher than it was in the 2023 vintage.

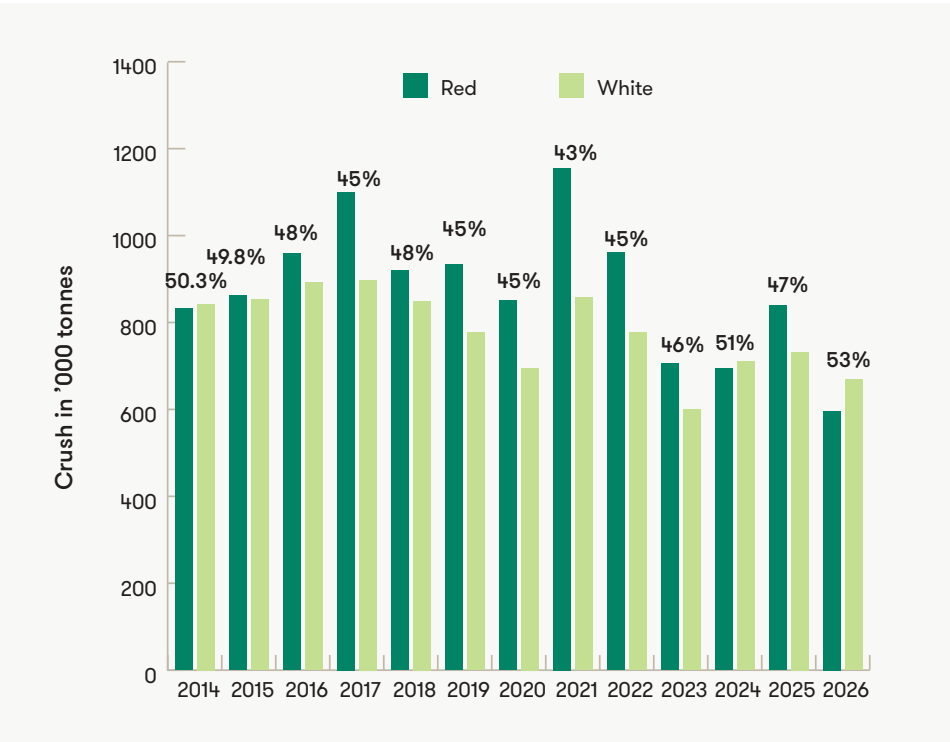


⁴ Grapes are classified according to their skin colour, even though some red grapes (e.g. Pinot Noir) may be used in white wine.

The more significant decline in the crush of reds resulted in a big jump in white’s share of the total crush – up six percentage points to 53 per cent – its highest share since 2012 and only the second time since 2014 that white varieties have accounted for the majority of the crush (Figure 2).

The crush of white varieties was 14 per cent below its 10-year average of 778,825 tonnes, while the crush of red varieties was 35 per cent below its 10-year average of 912,039 tonnes.

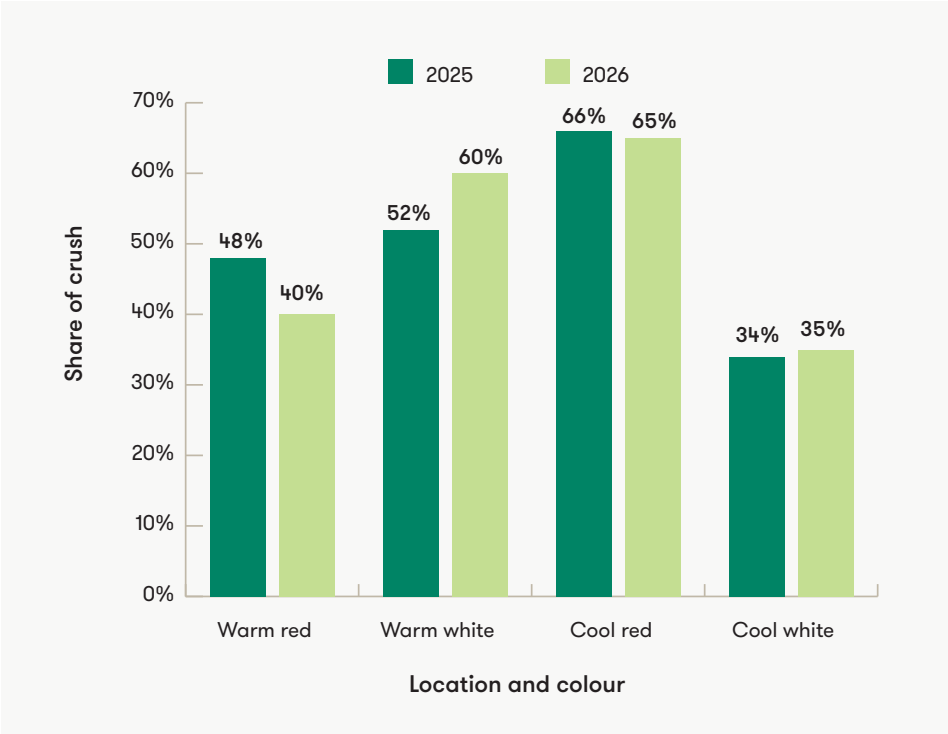
Figure 2: Winegrape crush by colour 2014–2026 and white percentage of total



The shift in the colour mix of the crush was even more pronounced in the warm inland regions⁵, where the red crush declined by 33 per cent compared to a 6 per cent decline in whites. This reduced the red varieties' share of the crush from 48 per cent to 40 per cent, while whites increased correspondingly from a 52 per cent to a 60 per cent share.

In contrast, there was little change in the cool / temperate regions⁶, where reds accounted for 65 per cent of the crush in 2026, down only slightly from 66 per cent in 2025 (Figure 3).

Figure 3: Share of crush by colour and location in 2026 vs 2025



5. The Riverland (SA), Murray Darling-Swan Hill (NSW and Victoria) and Riverina (NSW)
6. All other defined Geographical Indication (GI) regions and zones except the three identified as warm inland



Crush by variety

The composition of the top 10 varieties did not change in 2026. This group has not changed significantly overall for at least 10 years, falling into two distinct groups – the top three varieties and the rest. There are four reds and six whites in the top 10.

While the composition did not change, there was a significant decrease in the crush of Shiraz, which saw it lose its number one position to Chardonnay for the second time in the past three years.

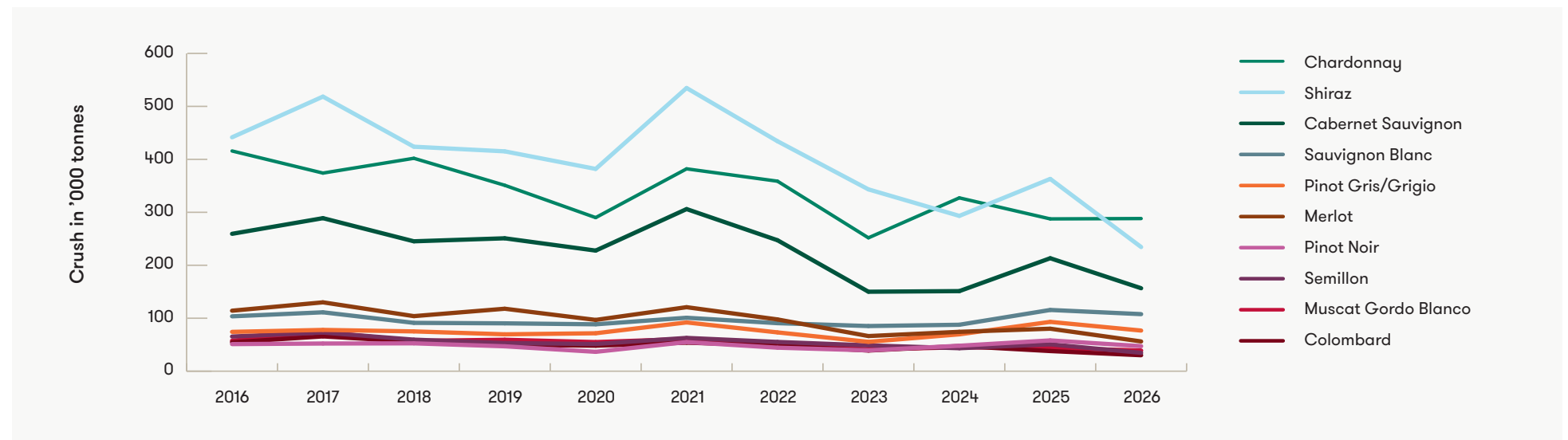
Shiraz decreased by 128,656 tonnes (35 per cent) accounting for 42 per cent of the total net decline in the crush, while the crush of Chardonnay remained almost identical to 2025. Although Chardonnay's crush (288,183 tonnes) was 16 per cent below its 10-year average, it became the largest variety by share at 23 per cent (up from 18 per cent in 2025). Shiraz fell to 234,377 tonnes – 44 per cent below its

10-year average –and its share of the national crush fell to 19 per cent. This was the first time in 15 years that Shiraz has dropped below a 20 per cent share of the national crush.

Pinot Gris/Grigio consolidated its position in the top five, widening the gap over Merlot, which ranked sixth for the second consecutive year. Merlot may also fall below Pinot Noir in coming years, which would make Pinot Noir the third-largest red variety (noting that not all Pinot Noir is used to make still red wine).

Rounding out the top 10, Muscat Gordo Blanco, Semillon and Colombard all declined to well below their 10-year averages. All the top 10 varieties recorded year-on-year declines except Chardonnay, and only Sauvignon Blanc and Pinot Gris/Grigio were above their 10-year averages (Figure 4).

Figure 4: Estimated crush of top 10 varieties 2016–2026



Top 10 varieties – white

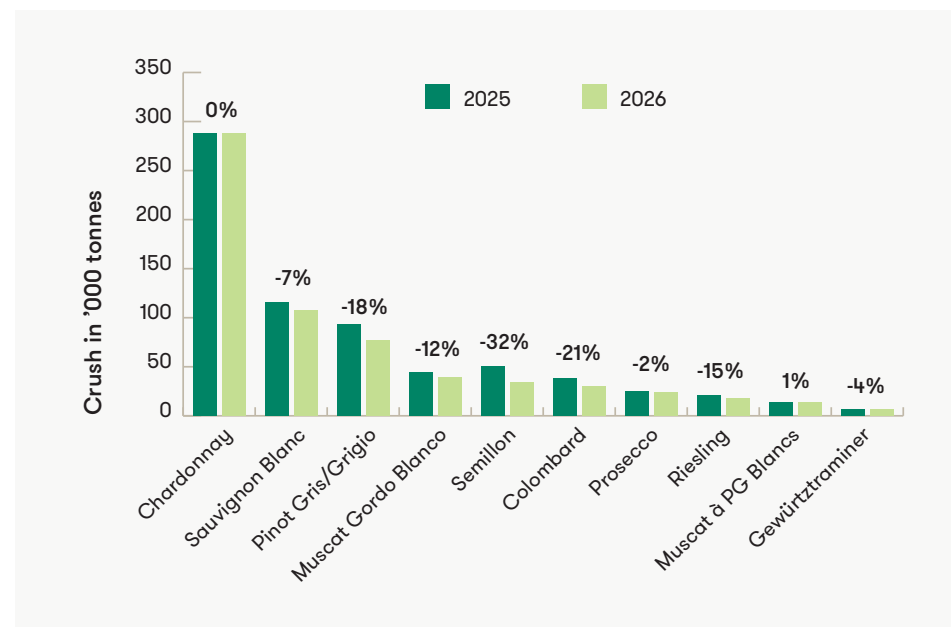
Overall, the top 10 whites declined by 8 per cent, despite Chardonnay's crush remaining almost identical to 2025. The largest decreases were in Semillon (down 32 per cent) and Colombard (down 21 per cent), while Sauvignon Blanc decreased by 7 per cent and Prosecco by 2 per cent. Only Muscat à Petits Grains Blanc increased (up by 1 per cent). See Figure 5.

As a result, Chardonnay increased its share of white varieties by 4 percentage points from 39 per cent to 43 per cent, mainly at the expense of Pinot Gris/Grigio and Semillon.

Semillon dropped from fourth to fifth place, overtaken by Muscat Gordo Blanco.

This group of 10 made up 95 per cent of the total white crush in 2026, while the top three together accounted for 71 per cent.

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



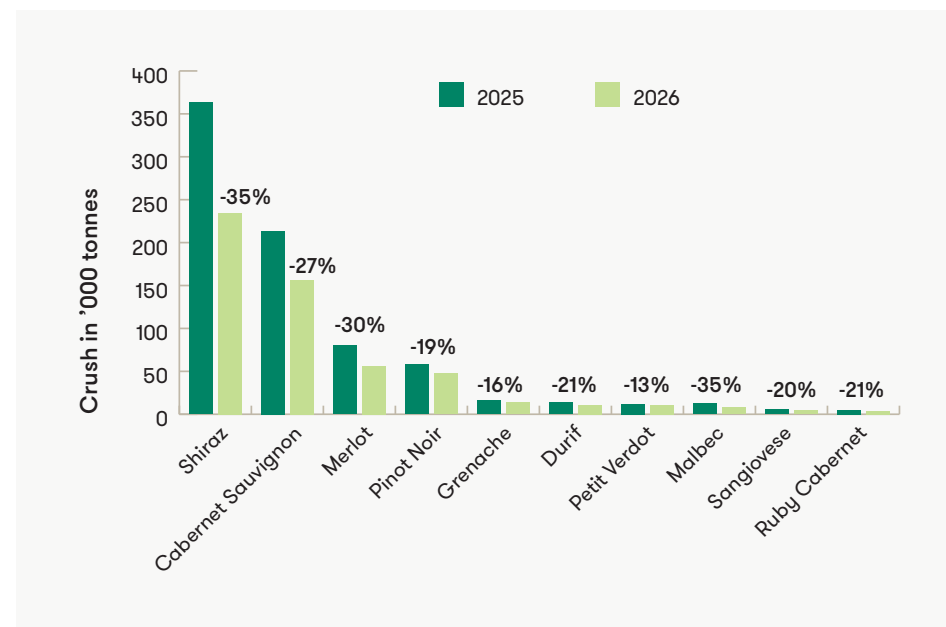
Top 10 varieties – red

The top 10 red varieties declined by much more than the whites – down by 30 per cent overall. Individually, all top 10 varieties recorded double-digit declines, with Shiraz and Malbec down the most (35 per cent each) and Petit Verdot the least (down 13 per cent). The only change in ranking was Malbec dropping to eighth position below Petit Verdot.

Mataro/Mourvèdre fell out of the top 10 after a 38 per cent decline in crush, narrowly overtaken by Ruby Cabernet by just one tonne (Figure 6). Tempranillo declined by 38 per cent, remaining outside the top 10 for the second year in a row, but by a greater margin than in 2025.

It is not possible to determine whether these changes were driven primarily by seasonal impacts or a reduction in demand for the varieties.

Figure 6: Estimated crush of top 10 red varieties and year-on-year change



Other varieties

The top 10 red and top 10 white varieties accounted for 94 per cent of the total estimated crush in 2026, the same as in 2025.

In addition to the top 10 reds and top 10 whites, respondents to the survey reported a further 70 red and 60 white varieties, accounting for the remaining 6 per cent of the crush (81,452 tonnes).

Some of these varieties are individually reported in the National Vintage Report and on the Wine Australia Vintage Survey Dashboard, while others are grouped under 'other red' or 'other white' because of their small volumes and/or small number of reporting wineries.

Overall, the other reds decreased by -16 per cent. However, some varieties showed smaller decreases – including Montepulciano (down -9 per cent) and Nero d'Avola (down -1 per cent) – while Nebbiolo increased by 6 per cent against the overall trend.

In the whites, the varieties outside the top 10 also decreased by -16 per cent overall, with Fiano (-1 per cent), Gewürztraminer (down -4 per cent) and Prosecco (down -2 per cent) showing smaller decreases individually, while Muscat à Petits Grains Blancs increased by 1 per cent.

These varieties are very small and therefore subject to greater variations due to reporting differences between years. However, these results may also reflect changing consumer demands, including a shift towards lighter reds and alternative and sparkling whites.

Details of all the major varieties can be found in table 3 on page 19.

Table 4 on page 20 provides more detail on the minor varieties crushed in Australia, as reported by respondents to the National Vintage Survey 2026. There are 74 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 30 red and 26 white varieties reported by fewer than three wineries in 2026 – including some that are not identified by name. These are not listed individually, to protect the confidentiality of the respondents' data.



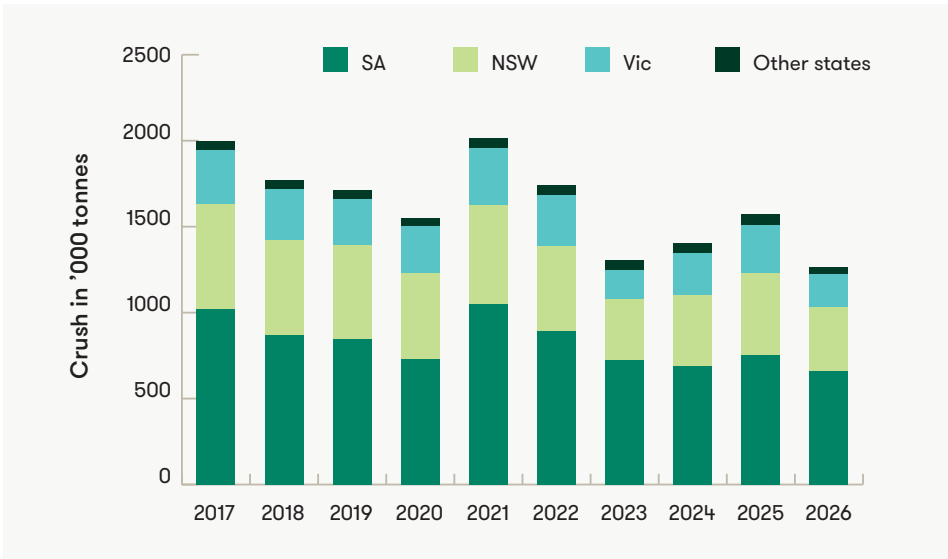
Vintage by state and region

South Australia (SA), New South Wales (NSW) and Victoria together accounted for 97 per cent of the crush.

The SA crush is estimated to be 658,087 tonnes, down 12 per cent from 2025 and 23 per cent below its 10-year average. It was the smallest estimated crush for SA since 2000, and 35 per cent below its highest estimated crush of over 1 million tonnes in 2017. Despite this, the reduction was smaller than in other states, resulting in SA increasing its share of the national crush by 4 percentage points to 52 per cent, slightly above its 10-year average share (50 per cent).

The next largest state by crush was NSW with 375,603 tonnes, down 22 per cent compared with 2025 and 26 per cent below its 10-year average. The NSW share of the national crush was 30 per cent, marginally down from 31 per cent in 2025 but in line with its average 10-year share.

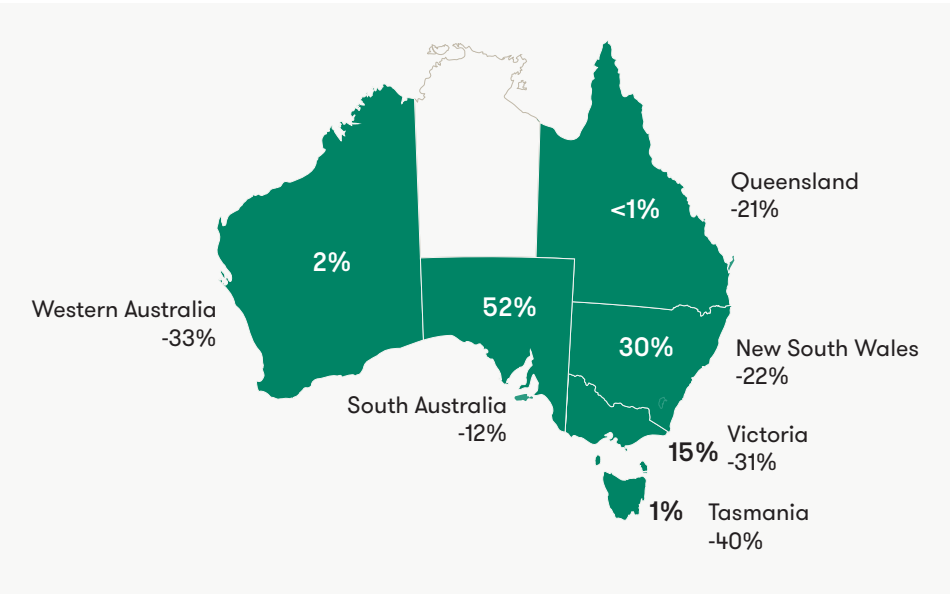
Figure 7: Crush by state 2017–2026



Victoria ranked third with an estimated crush of 191,765 tonnes, down 31 per cent year-on-year and also 31 per cent below its 10-year average. Victoria’s share of the national crush decreased by three percentage points from 18 per cent in 2025 to 15 per cent in 2026 – its second-lowest share since 2015.

The three smaller states together accounted for just over 3 per cent of the total estimated national crush. Western Australia (WA) recorded the largest crush with an estimated 28,378 tonnes – down 33 per cent year-on-year and 31 per cent below its 10-year average. Tasmania experienced the largest percentage decrease – down 40 per cent to 11,219 tonnes following two years of record crops, although this was still only 15 per cent below its 10-year average. Queensland decreased by 21 per cent year-on-year but remained broadly in line with its 10-year average. Survey response rates are generally lower in these states, which means that the overall non-response rate may be too low to fully account for their missing tonnes. See Figures 7 and 8.

Figure 8: Share of national crush by state in 2026 and year-on-year change in crush





Crush from inland regions

The three large inland regions – Riverina (NSW), Murray Darling – Swan Hill (NSW and Vic) and the Riverland (SA) – together accounted for 71 per cent of the national crush, down slightly from their 10-year average of 72 per cent but 1 percentage point higher than the previous year (70 per cent).

The collected crush⁷ from these inland regions combined was 782,716 tonnes, 23 per cent lower than the previous year and 27 per cent lower than the 10-year average of 1.07 million tonnes.

The crush from all three regions declined, with the biggest decrease in percentage terms coming from Murray Darling – Swan Hill (down 28 per cent) and the smallest from the Riverland (down 16 per cent). All three regions had reductions of 35 per cent or more compared with their peaks in 2021 (See figure 9 on next page).

Crush from cool / temperate regions

Outside of the warm inland regions, the Australian winegrape crush came from a further 71 GI⁸ regions and other GI designations (zones) in 2026⁹.

The combined crush from this ‘rest of Australia’ group was 319,796 tonnes, slightly less than that of the Riverland and around 100,000 tonnes more than either Murray Darling – Swan Hill or Riverina.

The cool / temperate regions (as a group) declined by a similar amount to the inland regions – down 25 per cent year-on-year, 25 per cent below their 10-year average and down 39 per cent since 2021.

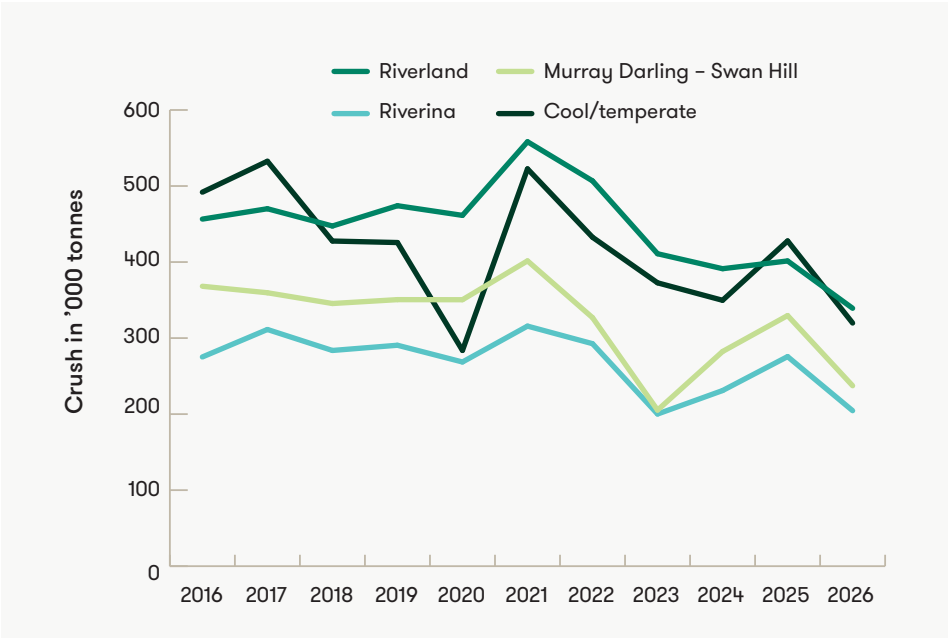
Over the past 5 years, the crush from the cool / temperate regions has closely matched that of the Riverland – despite the significant differences between this group and the Riverland region in terms of seasonal effects, grape and wine specifications and demand drivers. (Figure 9).

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

8. Geographical Indication

9. Tasmania is classified as a GI region as well as a state.

Figure 9: Crush over time from each of the three major warm inland regions and the cool/temperate regions (combined)



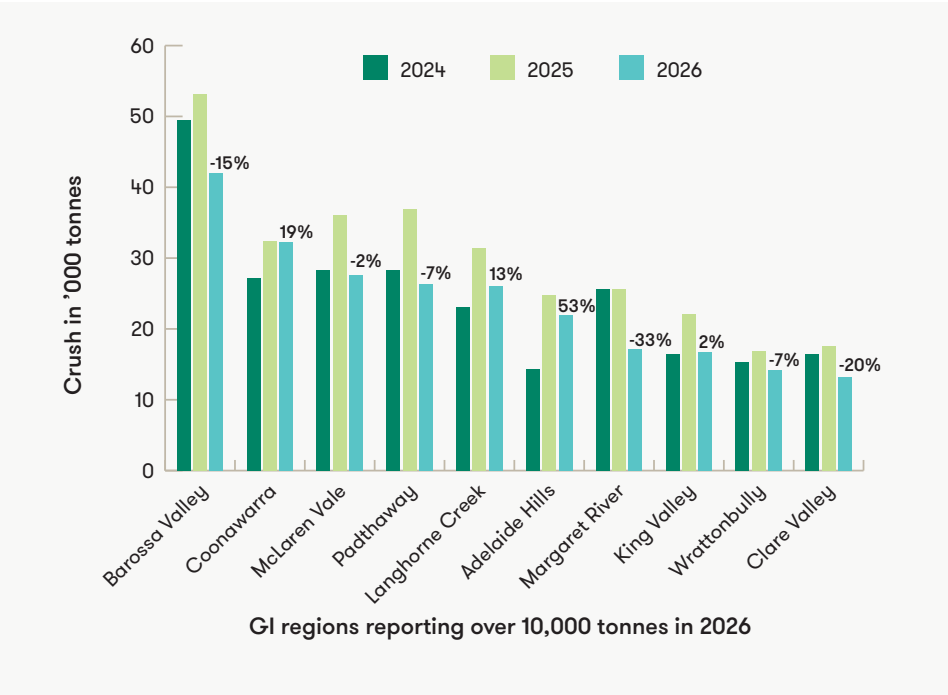
Top 10 cool / temperate regions

Among cool / temperate GIs, 10 GI regions reported a crush of more than 10,000 tonnes in 2026. Only two of these were outside SA.

All of these regions saw year-on-year declines in crush, with all but one declining by more than 10 per cent and most by more than 20 per cent. The exception was Coonawarra, which decreased by just -0.5 per cent and moved to second position behind Barossa Valley, overtaking both Padthaway and McLaren Vale.

However, over a two-year period, the outcomes were more variable. While most regions saw an increase in 2025 compared with 2024, the overall change across the two years ranged from an increase of 53 per cent for the Adelaide Hills to a decrease of 33 per cent for Margaret River (see Figure 10). In many cases, crush at a regional level in 2026 returned to similar sizes reported in 2024.

Figure 10: Crush for largest cool / temperate regions 2024–2026 and percentage change over 2 years



Details of the reported crush by state and region can be found in table 5 on pages 21–23.

Crush and value of purchased grapes

The National Vintage Survey distinguishes between tonnes of grapes grown by the business that crushed them (‘own grown’ or ‘winery grown’) and tonnes purchased from an independent business/grower. Reported prices paid for purchased grapes are used to calculate the average value of the grapes and the total value of the vintage.

In 2026, there were 22,788 separate batches of purchased grapes reported in the National Vintage Survey by 408 different purchasers. The total amount of purchased grapes reported was 724,715 tonnes, with a total value at the crusher of \$413.6 million¹⁰.

The total reported tonnes purchased was down 29 per cent compared with 2025, while the total of ‘own grown’ grapes declined by a smaller 10 per cent. As a result, the share of own grown fruit increased from 29 per cent in 2025 to 34 per cent in 2026.

The weighted average value calculated across all purchased grapes¹¹ was \$570 per tonne, down \$34 per tonne (6 per cent) compared with 2025.

The combination of the 29 per cent reduction in tonnes purchased and the 6 per cent decline in the overall average value led to a reduction of 33 per cent (\$207 million) in the total value of the purchased grapes.

The reduction in overall average purchase value was seen across warm inland and cool / temperate regions and for both reds and whites. Cool / temperate reds and whites were both down by 3 per cent year-on-year, while across the warm inland regions, reds were down by 1 per cent and whites down by 12 per cent.

Although the year-on-year changes were fairly similar across the categories in 2026, longer-term trends are more varied. The average purchase value for warm inland reds was 32 per cent below its 10-year average, whereas the average purchase value for whites – despite the 12 per cent reduction – was only 5 per cent below its 10-year average. In the case of the cool / temperate regions, the reds were also 5 per cent below their 10-year average, while – conversely – whites were 13 per cent above their 10-year average (Table 1).

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

11. The calculation excludes any batches where the price paid was not provided



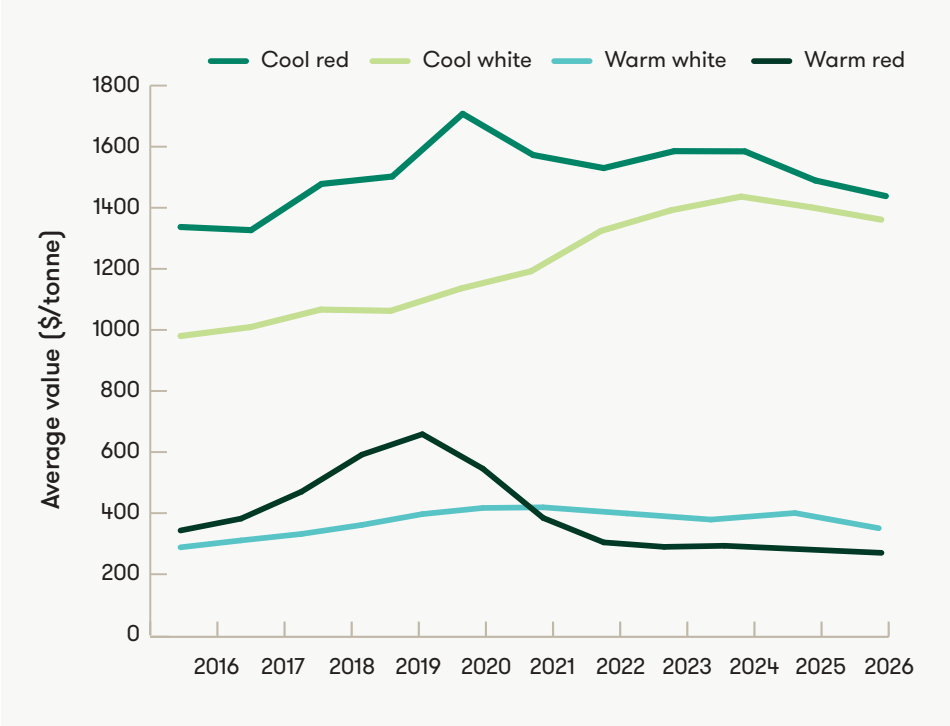
Table 1: Average purchase value and year-on-year changes for grapes by source and colour

		Average purchase value (\$/tonne)		Change in average value YoY	10-year average (2016–2025)	Change in average value vs 10-year average
		2025	2026			
Cool/temperate	Red	1489	1438	-3%	1511	-5%
	White	1401	1361	-3%	1200	13%
	Total	1459	1410	-3%	1411	0%
Warm inland	Red	293	291	-1%	426	-32%
	White	400	351	-12%	370	-5%
	Total	351	329	-6%	400	-18%
All regions	Total	604	570	-6%	626	-9%

The effect of the decline in average value for warm inland reds relative to its long-term average was to reduce the overall average value to \$570 per tonne – 9 per cent below the 10-year average. It was the lowest overall average value since 2017.

After falling dramatically between 2020 and 2023, the average value for warm inland reds has been stable for the past four years, remaining around \$60–\$100 per tonne below that of warm inland whites (Figure 11).

Figure 11: Average winegrape purchase value by source and colour 2016–2026



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 73 per cent of all grapes purchased from the inland regions in 2026.

The average value decreased year-on-year for all these varieties except Shiraz, which increased by 3 per cent (but from a lower starting point than the others). It returned to having the highest average value of the three major red varieties after being the lowest in 2025. Cabernet Sauvignon and Merlot both saw decreases in average value, to be even lower than the Shiraz value had been in 2025.

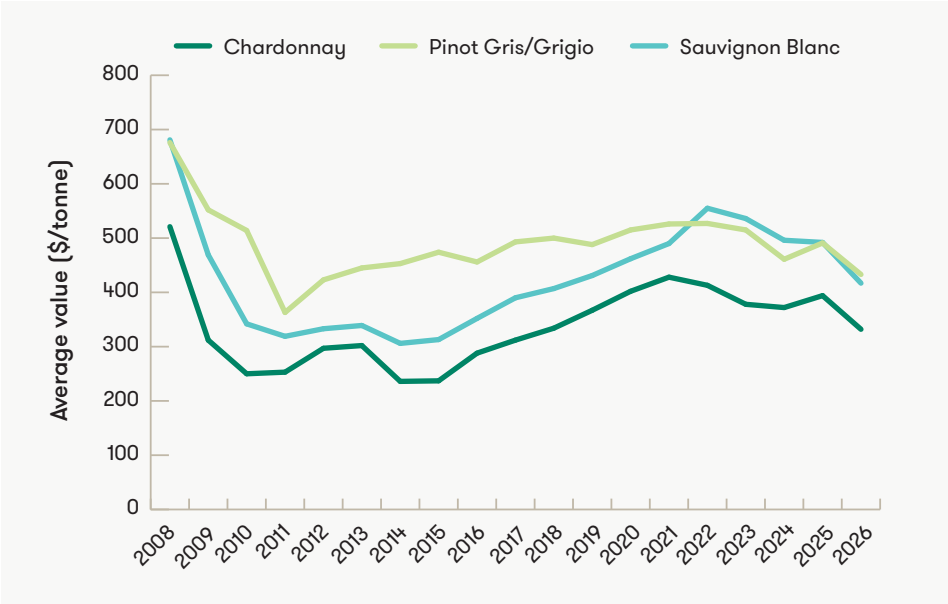
The white varieties all had double-digit decreases in average value despite declines in the crush – see Table 2.

Variety	Average value 2025	Average value 2026	Change in average value	Change in tonnes purchased
Cabernet Sauvignon	264	244	-7%	-46%
Merlot	286	247	-14%	-44%
Shiraz	257	265	3%	-52%
Chardonnay	394	332	-16%	-4%
Pinot Gris/Grigio	491	433	-12%	-20%
Sauvignon Blanc	492	417	-15%	-14%

The average values for these white varieties have now been generally declining for the past four years, after a period of slow growth since 2014. They are all at least \$200 per tonne lower than they were in 2008 (Figure 12).

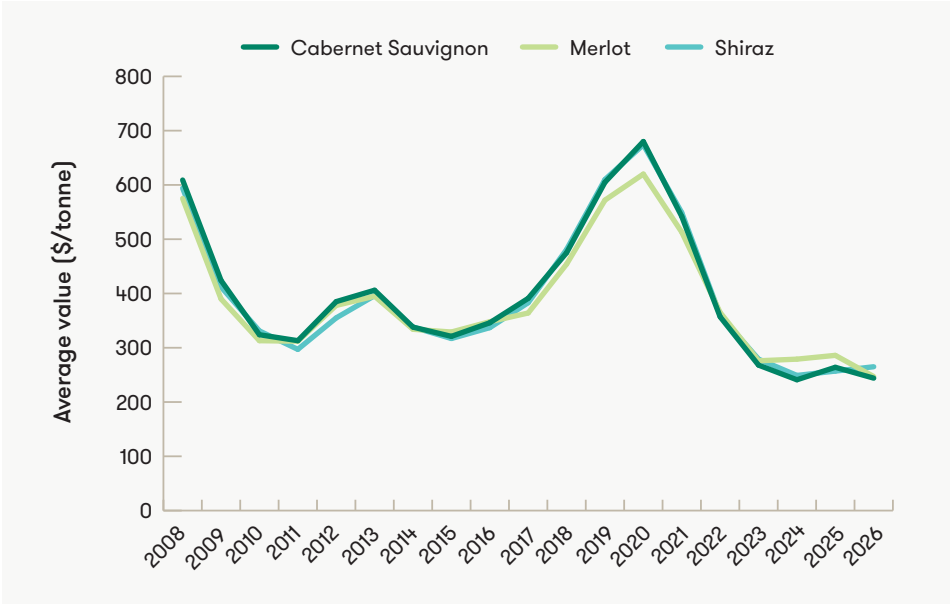


Figure 12: Average value per tonne for warm inland white varieties 2008–2026



For the major red varieties, the decline has been steeper and started a year earlier. It seems to have flattened out over the past three years, but shows no signs of a recovery (Figure 13).

Figure 13: Average value per tonne for warm inland red varieties 2008–2026



These price trends despite the significant reductions in the crush size over the past four years suggest that very soft demand for the major inland varieties is continuing, reflecting global declines in demand for wine and a lack of adjustment in the supply base.

Price dispersion

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.

Warm inland price dispersion

The distribution of prices for warm inland grapes generally showed a downward shift in 2026, reversing the result for 2025. For reds, the share purchased at below \$200 per tonne increased from 23 per cent in 2025 to 36 per cent in 2026. However, there was also a small increase in the share purchased at \$400 and above – up from 22 per cent to 27 per cent (Figure 14).

In the case of whites, the share of grapes purchased at below \$350 per tonne nearly doubled (up from 32 per cent to 61 per cent. By comparison, only 20 per cent of white grapes were purchased at \$400 and above in 2026, compared with 47 per cent in 2025 (Figure 15).

Overall, the share of inland grapes purchased at below \$300 per tonne remained very similar across the two years at just over one-third.



Figure 14: Price dispersion for warm inland red purchased grapes 2026 vs 2025

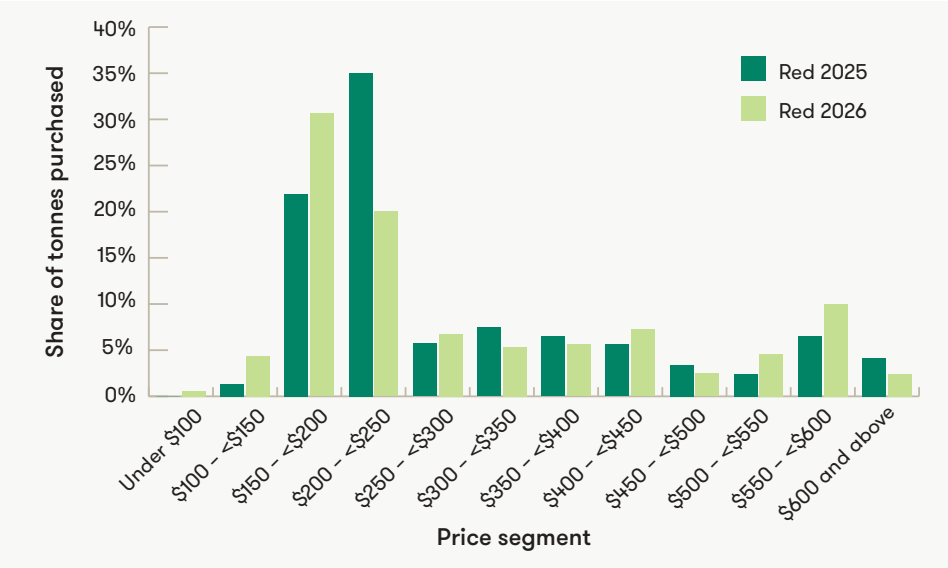
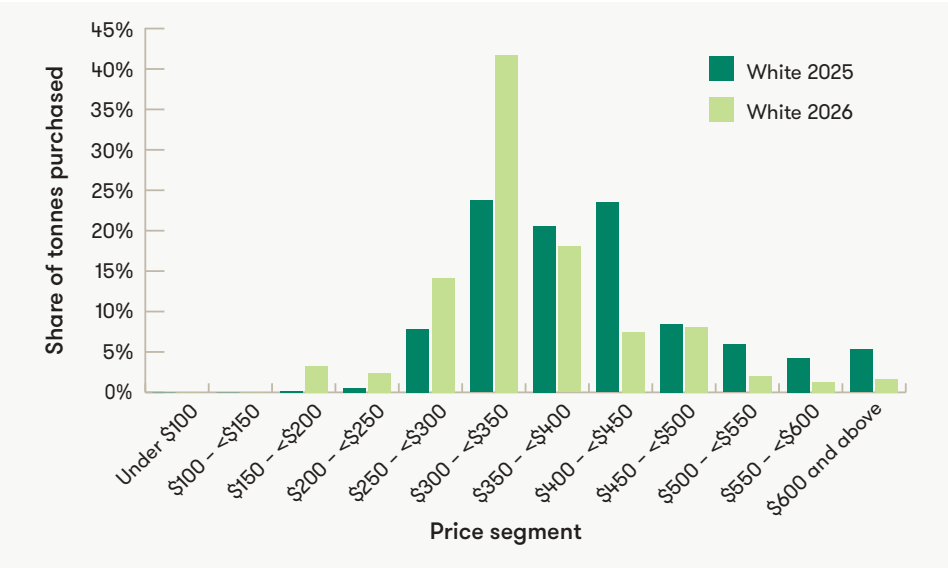


Figure 15: Price dispersion for warm inland white purchased grapes 2026 vs 2025



Cool temperate price dispersion

There was very little change in the price dispersion for the cool / temperate purchased grapes, although any shifts were generally downward.

For whites, the share purchased at below \$1200 per tonne increased from 45 per cent to 50 per cent, while the share purchased at \$2000 and above decreased from 24 per cent to 19 per cent. For reds, the changes in percentages were very similar to that for the whites, reflecting the overall softening in average value across both colours (Figure 16).

Figure 16: Price dispersion for cool / temperate purchased grapes 2026 vs 2025



Total crush value

Analysis of prices paid for purchased grapes allows values to be estimated at a region–variety level, which can then 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.

In 2026, the total reported value of purchased grapes was \$414 million, down 33 per cent compared with 2025. This is a result of the 29 per cent decrease in tonnes purchased combined with a 6 per cent overall decrease in the average value per tonne.

Applying these average values to winery-grown fruit at the region–variety level, and adjusting for survey non-response rate, gives a total estimated value of the 2026 vintage of \$837 million – down 26 per cent (nearly \$300 million) compared with 2025.



Crush by winery size and business model

In 2026, 667 respondents participated in the National Vintage Survey and were classified into size categories based on their reported crush.

The 20 largest crush size respondents (>10,000 tonnes) represented just 3 per cent of total respondents but accounted for 86 per cent of the reported crush and 75 per cent of the estimated total crush. In comparison, the 450 smallest crush size respondents (<100 tonnes), made up 67 per cent of the total responses but contributed only 1 per cent of the reported crush.

Respondents were also classified according to the source of their grapes: all own grown, all purchased or a combination.

In 2026, there were 259 respondents (39 per cent) who crushed only their own grown grapes, contributing 2 per cent of the total crush. A further 110 respondents (16 per cent) only purchased grapes, accounting for 10 per cent of the total crush. The remaining 298 respondents (45 per cent) had a mix of both purchased and own grown grapes and accounted for the vast majority (88 per cent) of the total tonnes crushed.

Figure 17: Share of respondents by business model 2026

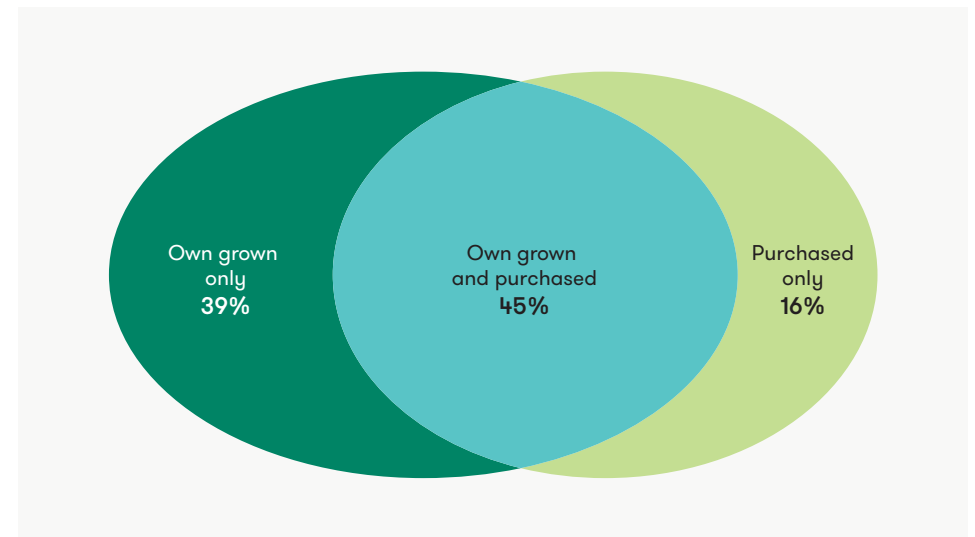


Table 3: Estimated crush by variety in 2026

Variety	Estimated tonnes	Per cent change in tonnes	Share of national crush	Estimated value all grapes
Red				
Barbera	347	-31%	0%	382,834
Cabernet Franc	528	-29%	0%	834,383
Cabernet Sauvignon	156,612	-27%	12%	109,815,469
Durif	11,070	-21%	1%	3,344,733
Graciano	160	-22%	0%	251,537
Grenache	13,550	-16%	1%	17,398,901
Lagrein	122	-37%	0%	69,997
Malbec	7,992	-35%	1%	6,271,531
Mataro/Mourvèdre	3,955	-38%	0%	4,781,352
Merlot	56,156	-30%	4%	20,532,787
Montepulciano	924	-9%	0%	798,938
Muscat à Petits Grains Rouges	817	-42%	0%	641,561
Nebbiolo	377	6%	0%	1,116,531
Nero d'Avola	1,366	-1%	0%	983,156
Other red	37,757	-9%	3%	20,102,324
Petit Verdot	10,557	-13%	1%	2,668,928
Pinot Meunier	484	-38%	0%	1,287,713
Pinot Noir	47,276	-19%	4%	74,289,618
Ruby Cabernet	3,956	-21%	0%	1,077,036
Sangiovese	4,274	-20%	0%	4,474,577
Shiraz	234,377	-35%	19%	179,515,160
Tempranillo	3,284	-38%	0%	3,089,952
Touriga Nacional	285	-58%	0%	448,595
Red Total	596,226	-29%	47%	454,177,614

Variety	Estimated tonnes	Per cent change in tonnes	Share of national crush	Estimated value all grapes
White				
Chardonnay	288,183	0%	23%	157,232,460
Chenin blanc	2,940	-2%	0%	2,762,565
Colombard	30,135	-21%	2%	8,255,743
Fiano	4,798	-1%	0%	3,621,105
Gewürztraminer	6,676	-4%	1%	2,445,617
Grüner Veltliner	305	-15%	0%	483,701
Marsanne	519	-52%	0%	497,675
Muscat à Petits Grains Blancs	13,495	1%	1%	4,182,085
Muscat Gordo Blanco	39,010	-12%	3%	11,554,101
Other white	9,735	-29%	1%	6,191,207
Pinot Gris/Grigio	76,721	-18%	6%	50,838,343
Prosecco	23,982	-2%	2%	20,982,295
Riesling	17,838	-15%	1%	23,624,366
Roussanne	467	-12%	0%	301,468
Sauvignon Blanc	107,719	-7%	9%	67,477,927
Semillon	34,641	-32%	3%	15,213,763
Verdelho	5,345	-15%	0%	3,411,492
Vermentino	1,736	-23%	0%	1,152,000
Viognier	5,200	3%	0%	2,779,629
White Total	669,445	-9%	53%	383,007,542
Grand Total	1,265,671	-19%	100%	837,185,156

Table 4: Varieties outside the top 10 reds and whites reported in the National Vintage Survey 2026

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.¹²

Other reds	Other whites
Aglianico	Muscat Hamburg
Alicante Bouschet	Negro Amaro
Carignan	Other red
Carmenère	Rubired
Chambourcin	Sagrantino
Cinsaut	Saperavi
Colorino	Souzao
Counoise	Tannat
Dolcetto	Teroldego
Gamay	Tinta Amarela
Isabella	Tinta Barroca
Lambrusco Maestri	Tinta Cão
Marzemino	Trousseau
Mencia	Zinfandel/Primitivo
	Other white
	Palomino
	Pecorino
	Pedro Ximenes
	Pinot blanc
	Piquepoul Blanc
	Savagnin
	Sylvaner
	Trebbiano
	Verdejo
	Verdicchio Bianco
	Verduzzo

12. There are a further 30 red and 26 white varieties reported by at least one winery in 2026 – including some that are not identified by name. These are not identified, to protect the confidentiality of the respondents.

Table 5: Crush by state and region (reported tonnes) in 2026

State and region	Tonnes purchased	Tonnes own grown	Total tonnes	Share winery grown	Share of national crush	# respondents
New South Wales	244,967	82,216	327,183	25%	30%	124
Canberra District	50	262	312	84%	0%	12
Central Ranges zone other	155	282	438	65%	0%	8
Cowra	793	-	793	0%	0%	2
Gundagai	104	24	128	19%	0%	7
Hastings River	-	22	22	100%	0%	1
Hilltops	274	4	278	1%	0%	15
Hunter	976	2,628	3,604	73%	0%	49
Mudgee	362	951	1,313	72%	0%	15
Murray Darling - Swan Hill NSW	58,948	53,993	112,942	48%	10%	16
Orange	343	2,028	2,372	86%	0%	27
Perricoota	303	-	303	0%	0%	1
Riverina	182,524	21,982	204,506	11%	19%	12
Shoalhaven Coast	2	32	33	95%	0%	2
South Coast zone other	1	5	6	82%	0%	1
Southern NSW zone other	-	2	2	100%	0%	1
Tumbarumba	132	-	132	0%	0%	9
Queensland	91	449	540	83%	0%	18
Granite Belt	88	443	531	83%	0%	16
Queensland zone other	3	3	6	47%	0%	2
South Burnett	-	3	3	100%	0%	1
South Australia	352,044	221,208	573,252	39%	52%	282
Adelaide Hills	14,022	7,863	21,885	36%	2%	98
Adelaide Plains	1,036	23	1,059	2%	0%	6
Barossa Valley	24,355	17,617	41,972	42%	4%	94
Barossa zone other	55	818	873	94%	0%	5
Clare Valley	6,190	7,035	13,226	53%	1%	36
Coonawarra	6,911	25,391	32,302	79%	3%	36
Currency Creek	5,150	2,025	7,175	28%	1%	16

Table 5: Crush by state and region (reported tonnes) in 2026 (continued)

State and region	Tonnes purchased	Tonnes own grown	Total tonnes	Share winery grown	Share of national crush	# respondents
Eden Valley	3,159	3,190	6,349	50%	1%	49
Fleurieu zone other	647	3	650	0%	0%	4
Kangaroo Island	4	70	74	95%	0%	3
Langhorne Creek	16,116	9,950	26,066	38%	2%	38
Limestone Coast zone other	4,008	3,679	7,687	48%	1%	10
Lower Murray zone other	1,395	-	1,395	0%	0%	4
McLaren Vale	15,453	12,192	27,645	44%	3%	110
Mount Benson	259	1,031	1,290	80%	0%	6
Mount Gambier	551	104	654	16%	0%	7
Mount Lofty Ranges zone other	129	3	131	2%	0%	4
Padthaway	21,262	5,129	26,391	19%	2%	16
Riverland	224,377	114,819	339,195	34%	31%	42
Robe	46	2,460	2,506	98%	0%	3
Southern Fleurieu	120	-	120	0%	0%	4
Southern Flinders Ranges	157	-	157	0%	0%	1
The Peninsulas	232	5	237	2%	0%	2
Wrattonbully	6,412	7,802	14,213	55%	1%	16
Tasmania	2,281	7,491	9,772	77%	1%	11
Tasmania	2,281	7,491	9,772	77%	1%	11
Victoria	113,682	53,362	167,045	32%	15%	200
Alpine Valleys	2,142	482	2,624	18%	0%	14
Beechworth	150	301	452	67%	0%	14
Bendigo	194	86	280	31%	0%	9
Central Victoria zone other	185	1,459	1,644	89%	0%	4
Geelong	58	402	460	87%	0%	14
Gippsland	20	308	328	94%	0%	10
Glenrowan	-	326	326	100%	0%	1
Goulburn Valley	354	908	1,262	72%	0%	7

Table 5: Crush by state and region (reported tonnes) in 2026 (continued)

State and region	Tonnes purchased	Tonnes own grown	Total tonnes	Share winery grown	Share of national crush	# respondents
Grampians	151	1,495	1,645	91%	0%	10
Heathcote	4,379	1,090	5,469	20%	0%	39
Henty	67	420	487	86%	0%	6
King Valley	7,782	9,000	16,783	54%	2%	36
Macedon Ranges	63	208	272	77%	0%	16
Mornington Peninsula	285	1,428	1,713	83%	0%	30
Murray Darling - Swan Hill VIC	95,413	28,962	124,375	23%	11%	25
North East Victoria zone other	-	60	60	100%	0%	1
Port Phillip zone other	-	2	2	100%	0%	1
Pyrenees	64	464	528	88%	0%	13
Rutherglen	112	1,065	1,177	91%	0%	16
Strathbogie Ranges	97	662	759	87%	0%	2
Sunbury	-	18	18	100%	0%	1
Upper Goulburn	326	69	395	18%	0%	5
Western Victoria zone other	89	5	95	6%	0%	4
Yarra Valley	1,752	4,142	5,894	70%	1%	39
Western Australia	11,649	13,070	24,720	53%	2%	108
Blackwood Valley	20	5	26	21%	0%	4
Central Western Australia	2	1	4	41%	0%	2
Geographe	67	540	608	89%	0%	11
Great Southern	3,192	1,015	4,206	24%	0%	24
Margaret River	8,104	9,030	17,133	53%	2%	71
Peel	0	12	12	97%	0%	3
Pemberton	159	148	307	48%	0%	9
Perth Hills	35	23	58	40%	0%	4
Swan District	70	2,296	2,366	97%	0%	16
Grand Total	724,715	377,796	1,102,511	34%	100%	667

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 1800 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 2026, there were 667 respondents to the National Vintage Survey and a further 108 who reported a zero crush for the 2026 vintage, making an overall 37 per cent response rate out of an estimated 1824 eligible businesses who received the survey invitation. While this is a good response, it was 84 fewer than the record of 751 respondents in 2025. It is not possible to determine the reasons behind the lower response rate, but it is likely to reflect a combination of more businesses having exited the industry or not crushed grapes, and a reduced capacity or willingness among others to participate in the survey, given the difficult economic conditions faced by most wine businesses.

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.

Overall, a total of 1,102,511 tonnes was reported to the National Vintage Survey in 2026. It is estimated that the tonnes reported accounted for 87 per cent of the total Australian winegrape crush in 2026, the lowest percentage since 2018 – although only 5 percentage points below the record of 92 per cent in 2025.

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. Therefore, the reported tonnage for smaller regions is likely to under-state their true crush by more than the overall non-response share.

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 year¹³. This is assumed to be representative of the overall change in crush size 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 most recent available DAFF figure¹⁴ for the previous vintage to provide an estimate for the current vintage.

13. The tonnage collected from this group is 99% of the total collected crush in 2026 and 86.5 per cent of the estimated crush

14. 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 2026.



2026 estimated crush calculation

Change in crush from respondents who responded in both 2025 and 2026	-19.5%
DAFF figure for 2025	1,572,005 tonnes
Calculation: $1,572,005 \times (1 - 0.19) = 1,265,671$	
Wine Australia estimated crush for 2026	1,265,671 tonnes

Reconciliation of crush estimate in 2025

Wine Australia estimate in 2025 survey	1,565,135 tonnes (June 2025)
DAFF levies return reported crush figure for 2025	1,572,005 tonnes (as at June 2026)

The Wine Australia estimate for the 2025 crush was within 7,000 tonnes (0.4 per cent) of the DAFF figure for levy returns from the 2025 vintage, as at June 2026.

It should be noted that the 2025 figures reported in this 2026 report will vary slightly from what was reported last year, as they have been adjusted based on using the updated DAFF recorded figure for 2025 and incorporating late responses and data corrections.

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 Manager, Market Insights Peter Bailey at Wine Australia peter.bailey@wineaustralia.com.

Published July 2026 © 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:

Wine Australia Market Insights

+61 8 8228 2000

market.insights@wineaustralia.com

Disclaimer

This information has been made available to assist on the understanding that Wine Australia is not rendering professional advice. Wine Australia does not accept responsibility for the results of any actions taken on the basis of the information contained in this report, nor for the accuracy, currency or completeness of any material contained in it. Wine Australia expressly disclaims all and any liability and responsibility to any person in respect of consequences of anything done in respect of reliance, whether wholly or in part, upon this report.

About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), growing domestic and international markets, and 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 R&I investments.