Murray Darling & Swan Hill

Wine Grape Crush Report

2020 Vintage

Murray Valley Winegrowers Inc

Wine Australia

Murray Valley Winegrape Industry Development Committee

iDC

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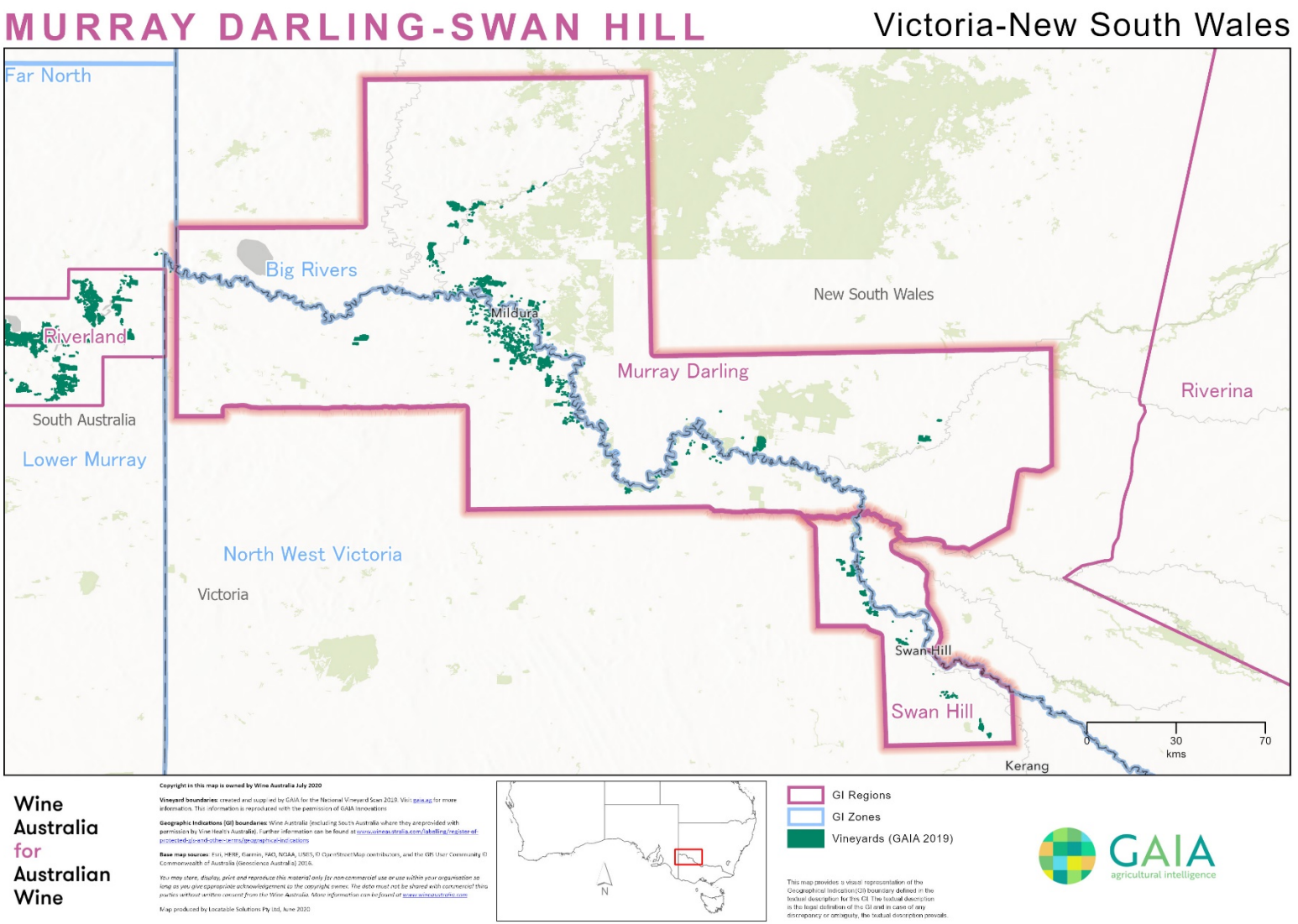
Murray Darling & Swan Hill GI regions



Section 1: Summary Data and Yearly Trends

Overview of vintage statistics 2020

The total wine grape harvest from the Murray Darling & Swan Hill regions in 2020 was 350,443 tonnes, virtually identical to the 2019 reported crush of 350,567 tonnes. The crush has been very consistent over the past three years at around 10,000 tonnes below the 10-year average of 360,620 tonnes.

Although the overall volume was very similar, the mix of winery-owned and purchased fruit changed slightly. The share of purchased fruit decreased from 71 per cent to 67 per cent as a result of tonnes purchased from independent growers decreasing by 5 per cent while the crush of winery-owned fruit increased by 12 per cent. This may reflect changes in ownership of vineyards, new plantings by wineries and/or differences in yield – possibly related to water use.

The crush of red grapes was up by 6 per cent overall, while the white crush was down by 5 per cent, continuing the trend from last year. The biggest decrease was in Chardonnay, which was down by 10,000 tonnes (12 per cent) following a decrease of 13,000 tonnes in 2019 (14 per cent) and an 18 per cent increase in 2018. It was still the largest white variety by far, accounting for 43 per cent of white purchased grapes and 38 per cent of white winery-grown grapes.

In the reds, Shiraz was up by 7,000 tonnes (10 per cent), Cabernet Sauvignon was up by 3,000 tonnes (6 per cent) and Merlot declined by 3,000 tonnes (11 per cent). Shiraz accounted for 43 per cent of red purchased grapes and 39 per cent of winery grown red grapes.

Reds increased their share of the crush by 3 percentage points to 50 per cent by volume and by 2 percentage points to 60 per cent by value.

The overall average purchase value for the Murray Darling and Swan Hill regions increased by 13 per cent from $471 to $532 per tonne. The average price of the top red varieties all increased: Chardonnay up by 10 per cent from $365 to $400 per tonne, Shiraz up by 11 per cent from $599 to $664 per tonne and Cabernet Sauvignon up by 11 per cent from $606 to $672 per tonne.

The higher average prices and the similar crush saw the total value of 2020 wine grapes purchased from independent growers in Murray Darling-Swan Hill increase by $11 million from $114 million in 2019 to $125 million. The estimated value of all grapes increased from $165 million to $186 million.

Vintage summary 2020 vs 2019

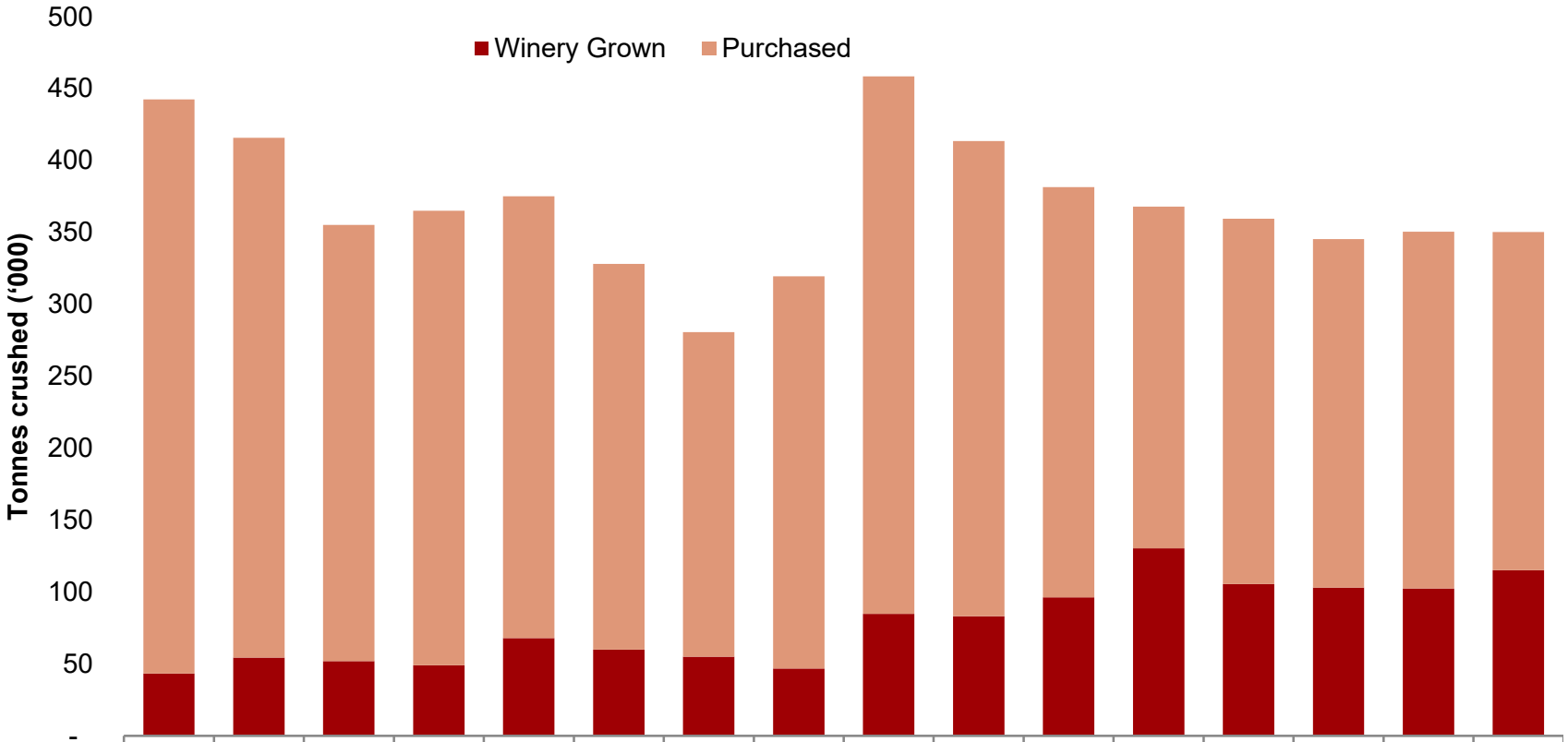
2020 Vintage

	Total Winery Grown Tonnes	Total Purchased Tonnes	Total Crushed Tonnes	Total value of Purchased Fruit	Total Value of Crush	Colour Percentage of Total Value	Colour Percentage of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
Red	53,025	120,446	173,472	$78,030,395	$112,382,480	60%	50%	69%	69%
White	62,196	114,775	176,971	$47,202,199	$73,962,220	39%	50%	65%	65%
Total crush	115,221	235,221	350,443	$125,232,594	$186,438,307	100%	100%	67%	67%

2019 Vintage

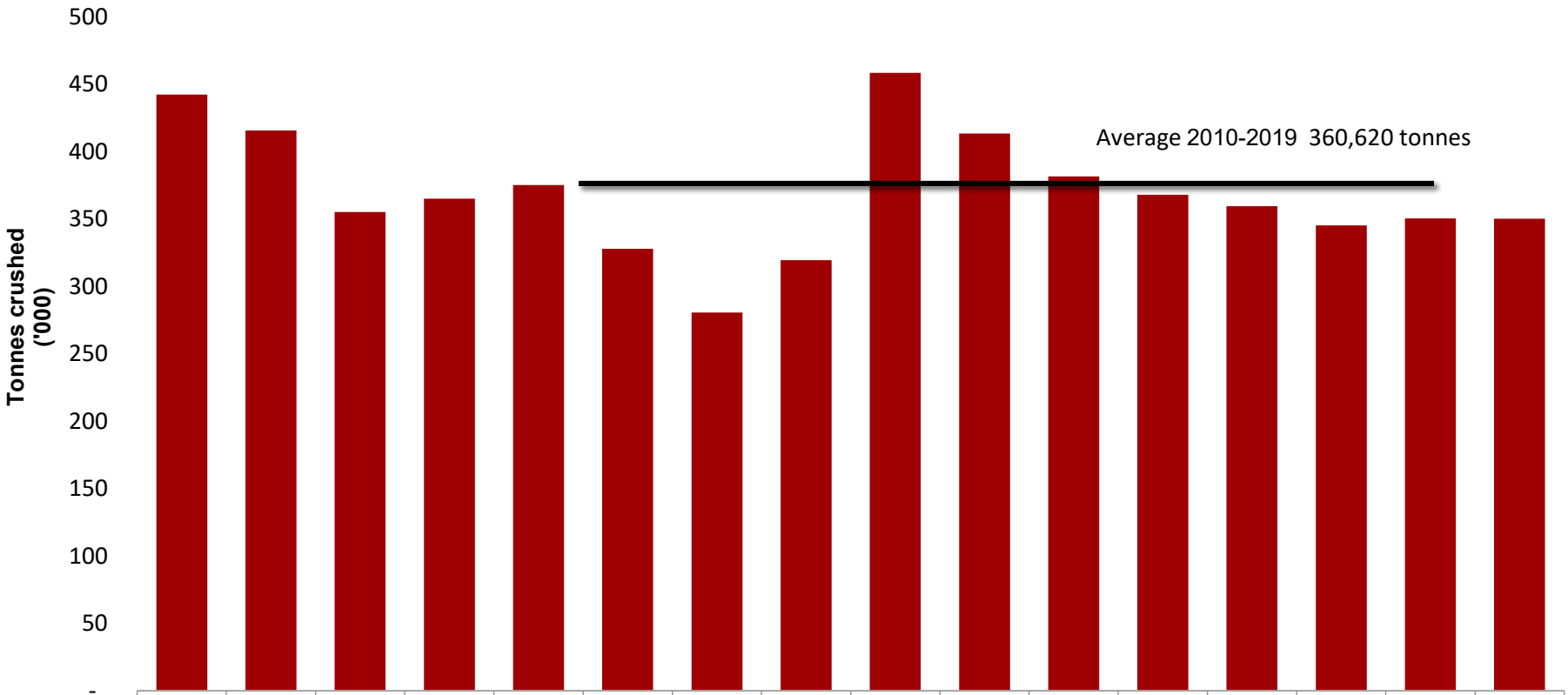
	Total Winery Grown Tonnes	Total Purchased Tonnes	Total Crushed Tonnes	Total value of Purchased Fruit	Total Value of Crush	Colour Percentage of Total Value	Colour Percentage of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
Red	47,682	116,535	164,217	$67,958,324	$95,764,298	58%	47%	71%	71%
White	54,742	131,608	186,350	$48,957,558	$69,321,301	42%	53%	71%	71%
Total crush	102,424	248,144	350,567	$116,915,882	$165,174,148	100%	100%	71%	71%

Historical trends in production – winery grown vs purchased fruit 2005-2020



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Purchased	399,282	361,614	303,389	316,211	307,323	268,147	225,806	272,781	373,900	330,387	285,402	237,678	254,160	242,276	248,144	235,221
Winery Grown	43,347	54,323	52,000	49,000	68,000	60,000	55,000	46,757	84,714	83,240	96,330	130,419	105,454	103,183	102,424	115,221

Historical crush from the Murray Darling and Swan Hill regions 2005-2020



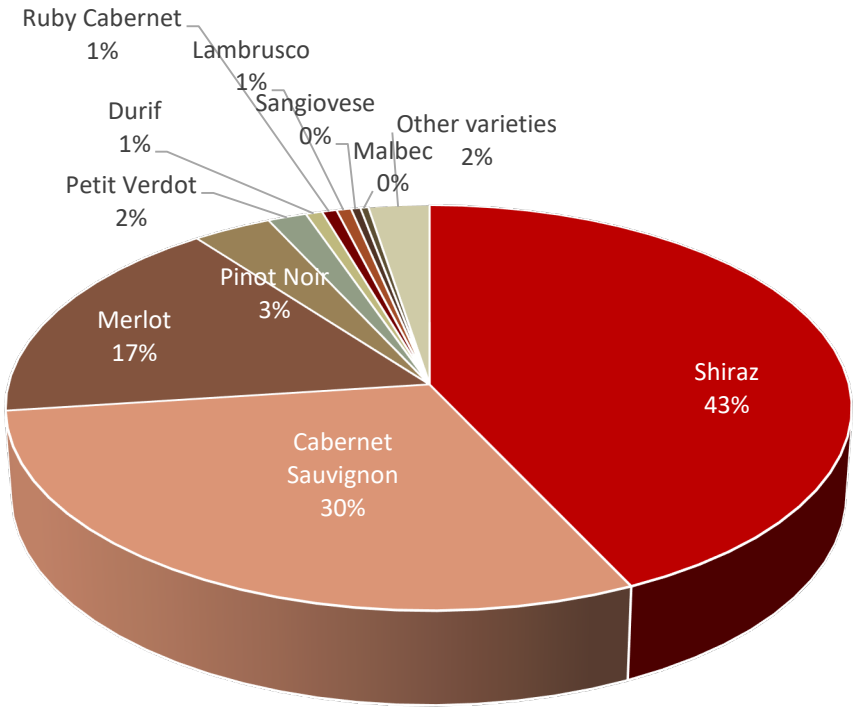
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total crush	442,629	415,937	355,389	365,211	375,323	328,147	280,806	319,538	458,614	413,627	381,732	368,097	359,614	345,458	350,567	350,443

Total purchased tonnes 2020 – red varieties

Reds (top 10)	Purchased (tonnes)
Shiraz	51,732
Cabernet Sauvignon	36,114
Merlot	20,188
Pinot Noir	4,062
Petit Verdot	1,992
Durif	849
Ruby Cabernet	751
Lambrusco	747
Sangiovese	482
Malbec	412
Other varieties	3,117
Total red	**120,446**

Other reds detail	Purchased (tonnes)
Rubired	388
Tempranillo	381
Grenache	327
Muscat a petits grains rouges	323
Dolcetto	242
Nero d'Avola	30
Sagrantino	27
Other varieties	1,399

Top 10 purchased red varieties (share)

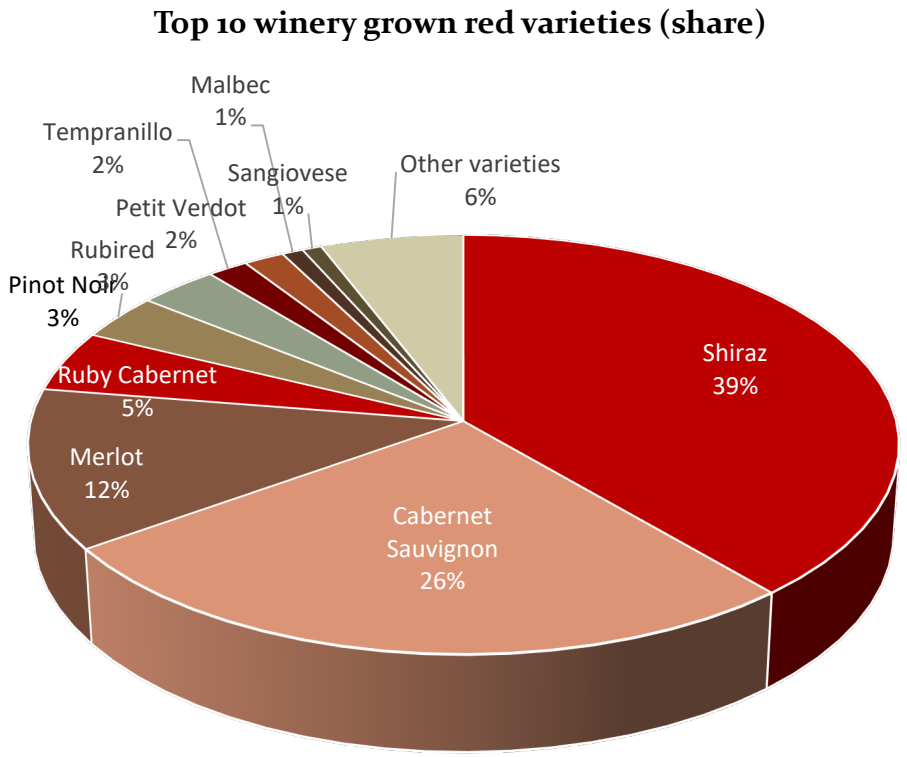


Note: varieties reported by fewer than three different wineries are not identified

Total winery-grown tonnes 2020 – red varieties

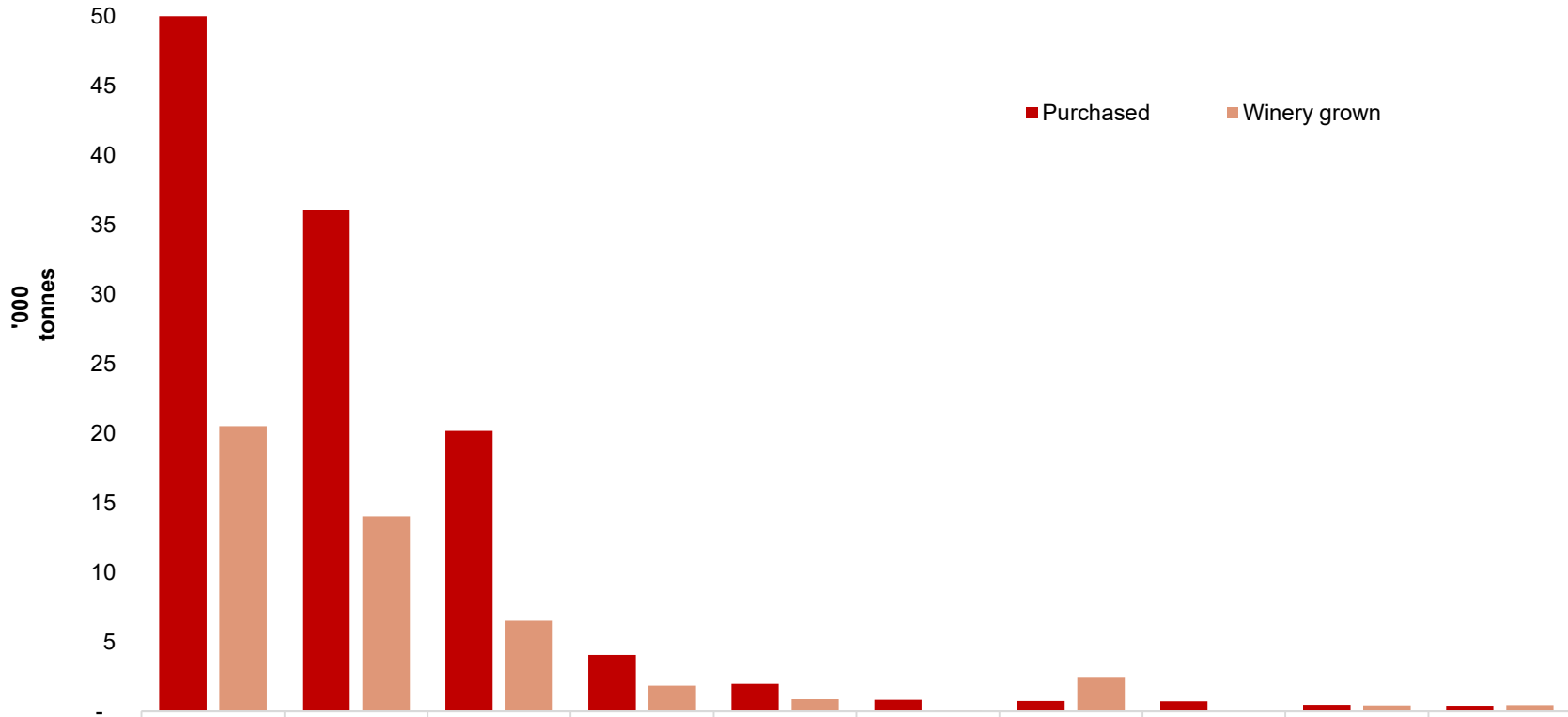
Reds (top 10)	Winery grown (tonnes)
Shiraz	20,523
Cabernet Sauvignon	14,038
Merlot	6,536
Ruby Cabernet	2,487
Pinot Noir	1,871
Rubired	1,753
Tempranillo	897
Petit Verdot	893
Malbec	467
Sangiovese	429
Other varieties	3,132
Total red	**53,025**

Other reds detail	Winery grown (tonnes)
Grenache	359
Nero d'Avola	265
Dolcetto	125
Sagrantino	92
Durif	72
Lambrusco	19
Other varieties	2,199



Note: varieties reported by fewer than three different wineries are not identified

Top ten purchased red varieties 2020 – comparison with winery-grown tonnes



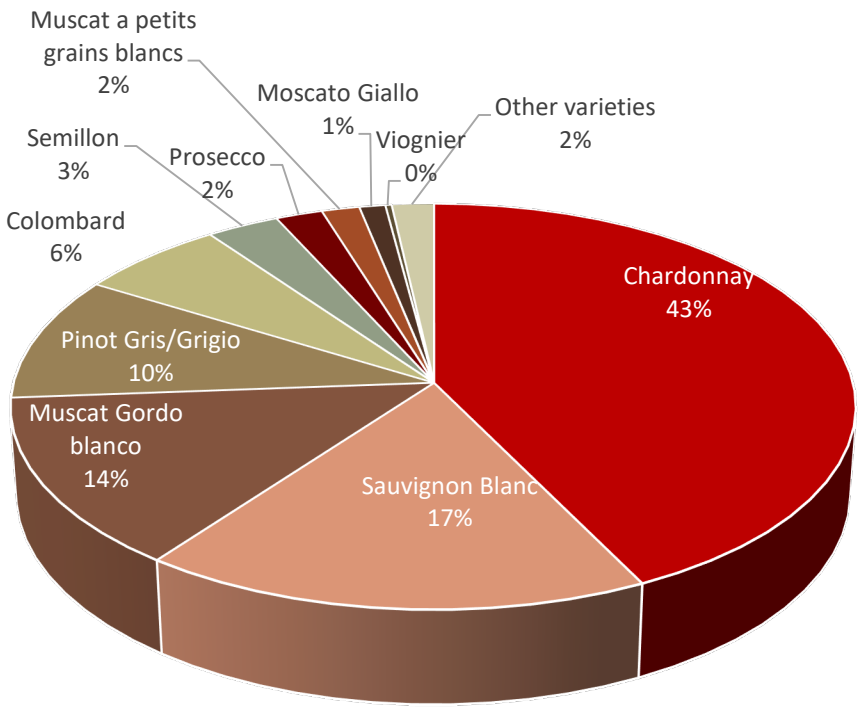
	Shiraz	Cabernet Sauvignon	Merlot	Pinot Noir	Petit Verdot	Durif	Ruby Cabernet	Lambrusco	Sangiovese	Malbec
Purchased	51,732	36,114	20,188	4,062	1,992	849	751	747	482	412
Winery grown	20,523	14,038	6,536	1,871	893	72	2,487	19	429	467

Total purchased tonnes 2020 – white varieties

Whites (top 10)	Purchased (tonnes)
Chardonnay	49,146
Sauvignon Blanc	20,100
Muscat Gordo blanco	15,711
Pinot Gris/Grigio	11,416
Colombard	7,300
Semillon	3,584
Prosecco	2,306
Muscat a petits grains blancs	1,864
Moscato Giallo	1,277
Viognier	309
Other varieties	1,761
Total white	**114,775**

Other whites detail	Purchased (tonnes)
Riesling	193
Vermentino	155
Fiano	128
Other varieties	1,286

Top 10 purchased white varieties (share)



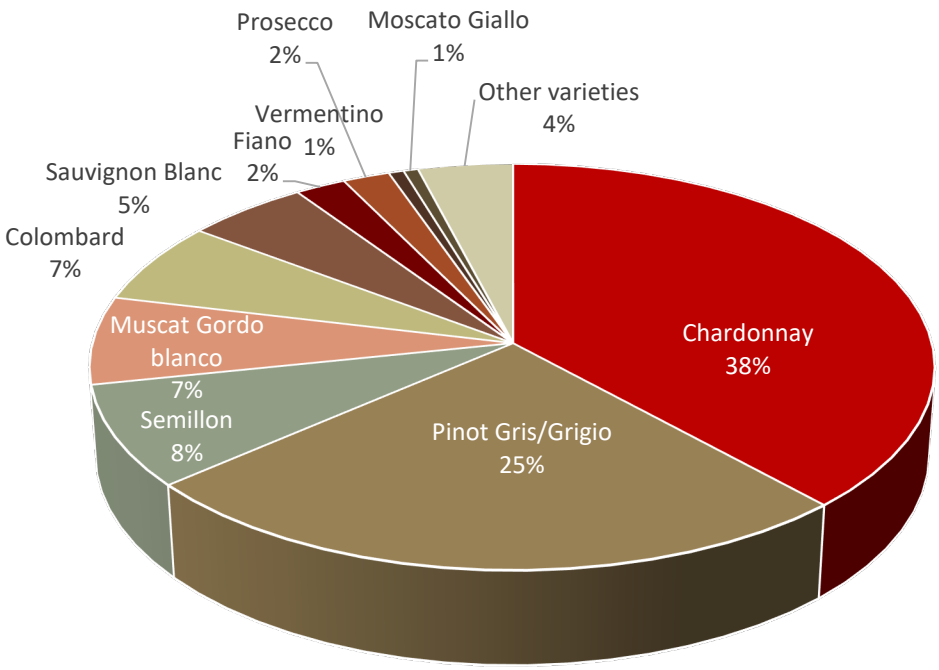
Note: varieties reported by fewer than three different wineries are not identified

Total winery-grown tonnes 2020 – white varieties

Whites (top 10)	Winery grown (tonnes)
Chardonnay	23,917
Pinot Gris/Grigio	15,920
Semillon	5,065
Muscat Gordo blanco	4,385
Colombard	4,075
Sauvignon Blanc	3,278
Fiano	1,360
Prosecco	1,255
Vermentino	407
Moscato Giallo	392
Other varieties	2,143
Total white	**62,196**

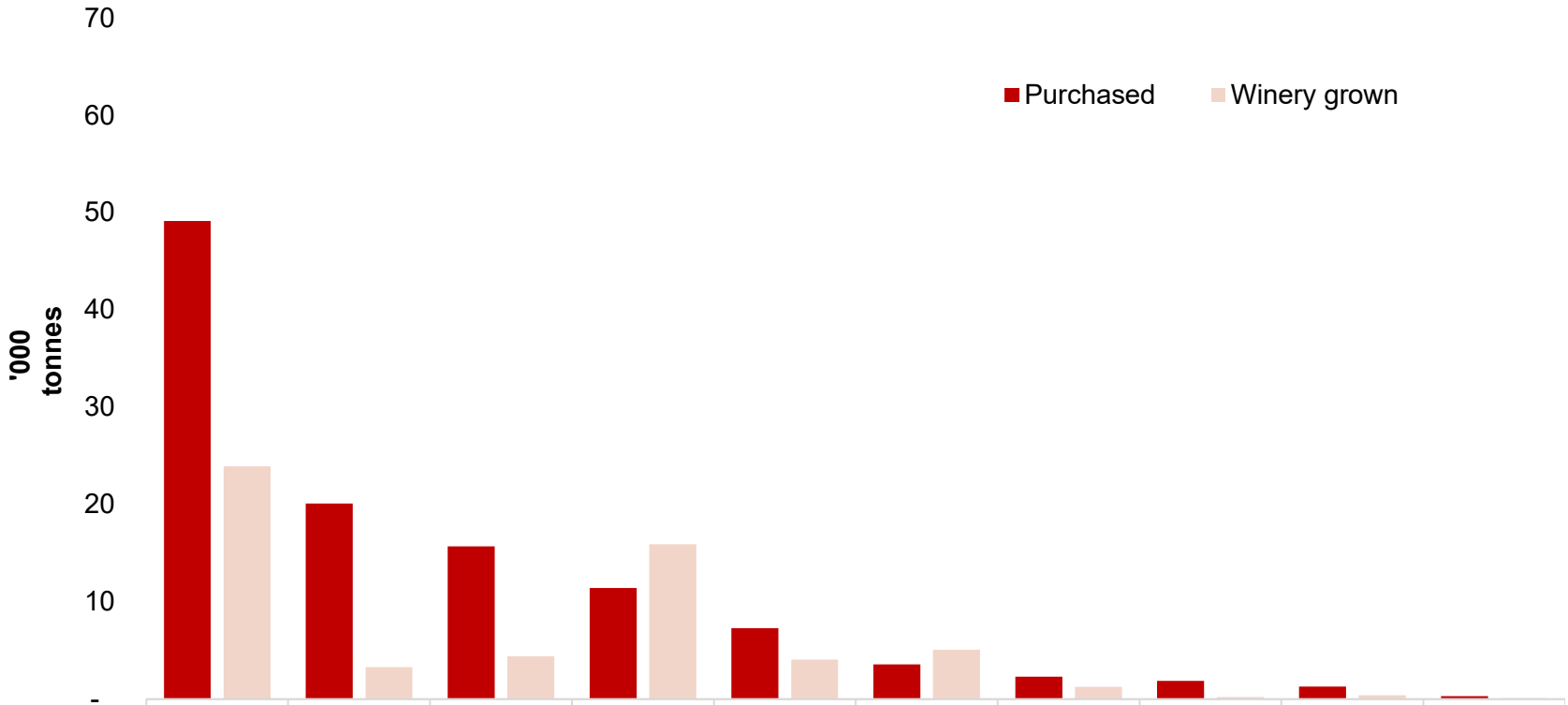
Other whites detail	
Riesling	375
Muscat a petits grains blancs	206
Viognier	82
Other varieties	1,481

Top 10 winery grown white varieties (share)



Note: varieties reported by fewer than three different wineries are not identified

Top ten purchased white varieties 2020 – comparison with winery-grown tonnes



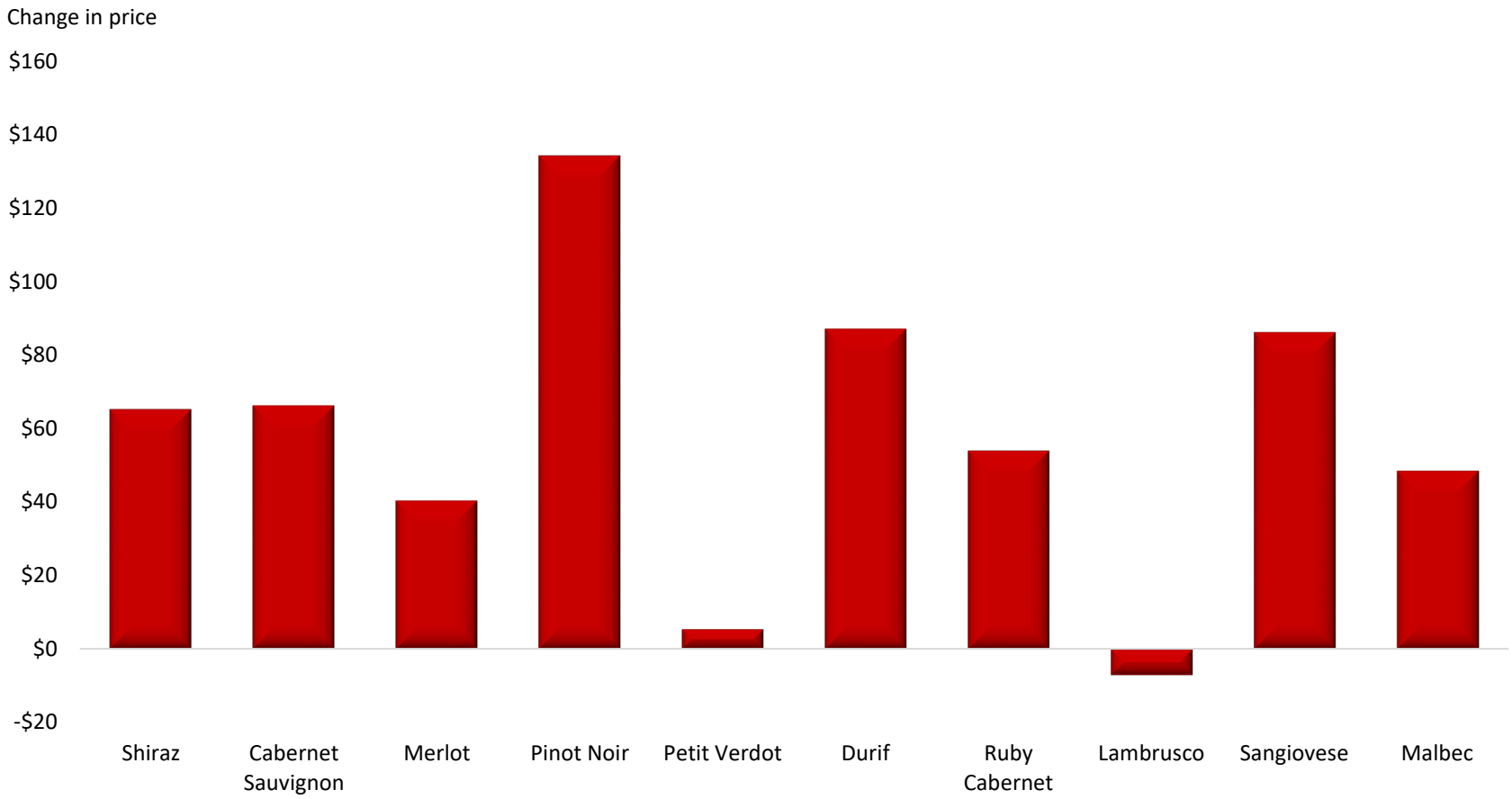
	Chardonnay	Sauvignon Blanc	Muscat Gordo blanco	Pinot Gris/Grigio	Colombard	Semillon	Prosecco	Muscat a petits grains blancs	Moscato Giallo	Viognier
Purchased	49,146	20,100	15,711	11,416	7,300	3,584	2,306	1,864	1,277	309
Winery grown	23,917	3,278	4,385	15,920	4,075	5,065	1,255	206	392	82

Section 2: Wine Grape Value and Tonnage Data 2020

Intake and price summary data by variety 2020 – red varieties

	Purchased Grape Summary			Winery	2020 Total			2019 Summary	
Variety	Purchased Tonnes	Value of Fruit Purchased	Average Purchase Price	Winery Grown Tonnes	Total Tonnes	Estimated Total Value	Tonnes as % of Total Reds	Average Purchase Price	Total Tonnes
Red									
Cabernet Sauvignon	36,114	$24,285,108	$672	14,038	50,153	$33,725,218	29%	$606	47,143
Durif	849	$634,618	$748	72	921	$688,546	1%	$660	799
Graciano	2	$1,722		134	137	$95,690	0%		92
Grenache	327	$223,311	$683	359	686	$468,965	0%	$578	555
Malbec	412	$246,556	$598	467	879	$525,657	1%		604
Mataro/Mourvedre	175	$109,498			175	$109,498	0%		115
Merlot	20,188	$11,968,183	$593	6,536	26,724	$15,842,871	15%	$552	29,936
Montepulciano				250	250		0%		183
Muscat a petits grains rouges	323	$171,582	$532		323	$171,582	0%	$624	327
Nebbiolo				30	30		0%		22
Nero d'Avola	30	$32,732		265	295	$324,716	0%		231
Petit Verdot	1,992	$974,205	$489	893	2,885	$1,410,860	2%	$484	2,895
Pinot Noir	4,062	$2,375,748	$585	1,871	5,933	$3,470,061	3%	$451	5,427
Ruby Cabernet	751	$492,609	$656	2,487	3,238	$2,124,217	2%	$602	3,372
Sangiovese	482	$299,804	$622	429	911	$567,036	1%	$536	857
Shiraz	51,732	$34,359,510	$664	20,523	72,255	$47,990,688	42%	$599	65,555
Tempranillo	381	$249,471	$655	897	1,278	$836,653	1%		1,273
Other red	2,626	$1,605,738	$611	3,774	6,400	$3,913,163	4%	$492	4,832
Red Total	**120,446**	**$78,030,395**	**$648**	**53,025**	**173,472**	**$112,382,480**	**100%**	**$583**	**164,217**

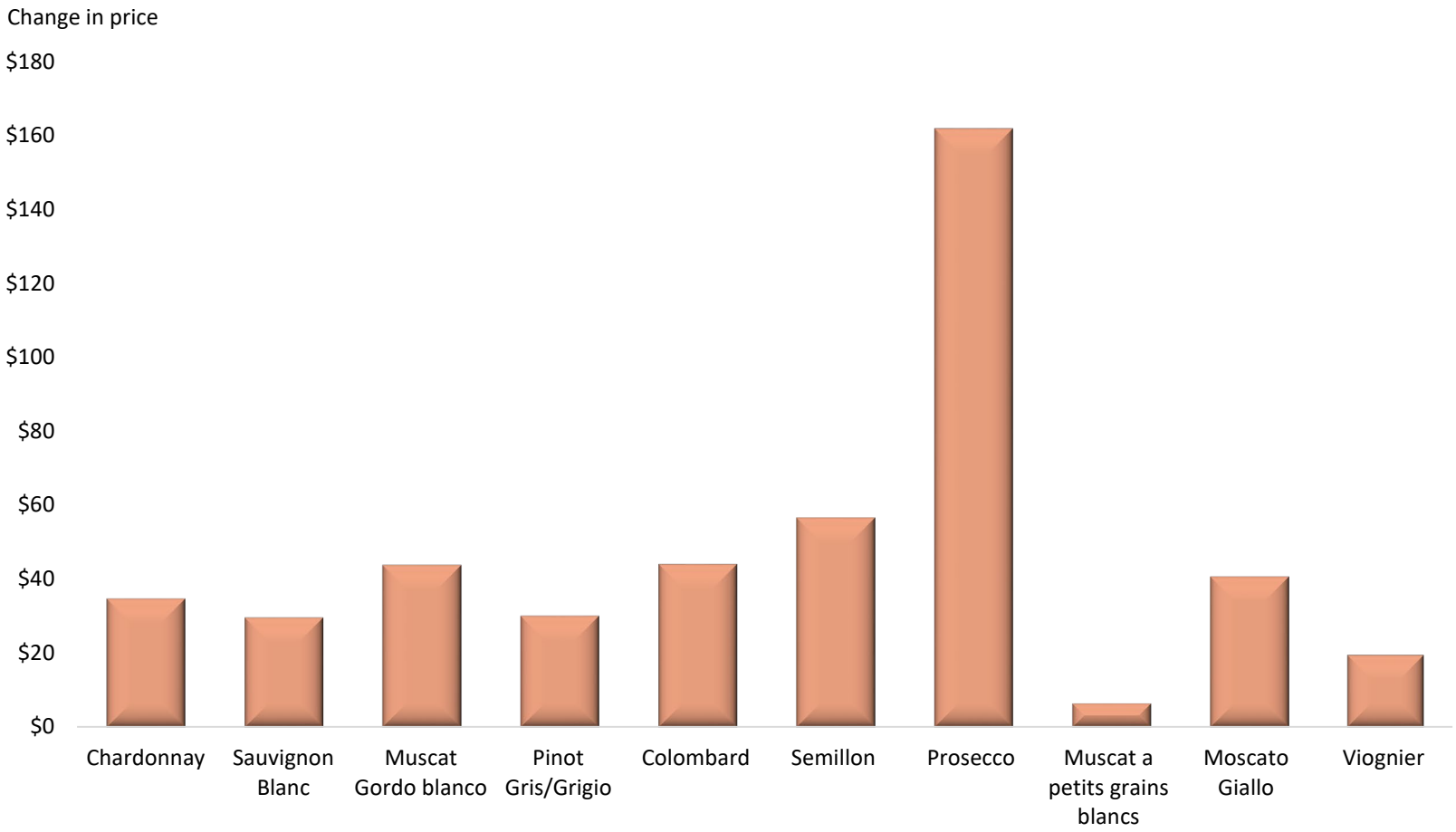
Change in average price per tonne 2019 to 2020 – top 10 red varieties by tonnes purchased



Intake and price summary data by variety 2020 – white varieties

	Purchased Grape Summary			Winery	2020 Total			2019 Summary	
Variety	Purchased Tonnes	Value of Fruit Purchased	Average Purchase Price	Winery Grown Tonnes	Total Tonnes	Total Value	Tonnes as % of Total Whites	Average Purchase Price	Total Tonnes
White						$0			
Chardonnay	49,146	$19,667,668	$400	23,917	73,064	$29,239,096	41%	$365	83,304
Chenin blanc	128	$47,114			128	$47,114	0%		300
Colombard	7,300	$2,332,652	$320	4,075	11,375	$3,634,695	6%	$275	10,694
Fiano	128	$67,065	$524	1,360	1,488	$780,115	1%	$497	2,346
Gewurztraminer	121	$51,221			121	$51,221	0%	$0	154
Muscat a petits grains blancs	1,864	$631,635	$339	206	2,069	$701,345	1%	$332	1,907
Muscat Gordo Blanco	15,711	$5,117,823	$326	4,385	20,096	$6,546,169	11%	$282	20,143
Pinot Gris/Grigio	11,416	$6,004,317	$526	15,920	27,335	$14,377,481	15%	$496	25,095
Prosecco	2,306	$1,635,407	$709	1,255	3,561	$2,525,367	2%	$547	3,385
Riesling	193	$95,770		375	567	$282,079	0%		614
Sauvignon Blanc	20,100	$9,302,940	$463	3,278	23,378	$10,820,141	13%	$433	23,880
Semillon	3,584	$1,249,710	$349	5,065	8,649	$3,015,864	5%	$292	9,057
Verdelho		$0		629	629	$0	0%		395
Vermentino	155	$103,123	$664	407	562	$373,155	0%		459
Viognier	309	$116,983		82	391	$147,884	0%	$359	553
Other white	2,314	$778,772	$337	1,244	3,558	$1,197,254	2%	$288	4,064
White Total	**114,775**	**$47,202,199**	**$411**	**62,196**	**176,971**	**$73,962,220**	**100%**	**$372**	**186,350**
Grand Total	**235,221**	**$125,232,594**	**$532**	**115,221**	**350,443**	**$186,438,307**		**$471**	**350,567**

Change in average price per tonne 2019 to 2020 – top 10 white varieties by tonnes purchased



Price dispersion 2020 – red varieties

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< $300	$300 to <$600	$600 to <$1500	$1500 to <$2000	$2000+							
Red													
Cabernet Sauvignon	36,114		1,392	34,722			$24,285,108	$672	11%	14,038	28%	50,153	$33,725,218
Durif	849			849			$634,618	$748	13%	72	8%	921	$688,546
Graciano	2			2						134	98%	137	$95,690
Grenache	327		98	229			$223,311	$683	18%	359	52%	686	$468,965
Malbec	412		300	112			$246,556	$598		467	53%	879	$525,657
Mataro/Mourvedre	175			175							0%	175	$109,498
Merlot	20,188		4,435	15,753			$11,968,183	$593	7%	6,536	24%	26,724	$15,842,871
Montepulciano										250	100%	250	$190,507
Muscat a petits grains rouges	323		91	232			$171,582	$532	-15%		0%	323	$171,582
Nebbiolo										30	100%	30	$20,160
Nero d'Avola	30			30						265	90%	295	$324,716
Petit Verdot	1,992		1,257	735			$974,205	$489	1%	893	31%	2,885	$1,410,860
Pinot Noir	4,062		3,128	934			$2,375,748	$585	30%	1,871	32%	5,933	$3,470,061
Ruby Cabernet	751		53	698			$492,609	$656	9%	2,487	77%	3,238	$2,124,217
Sangiovese	482		153	329			$299,804	$622	16%	429	47%	911	$567,036
Shiraz	51,732		4,185	47,547			$34,359,510	$664	11%	20,523	28%	72,255	$47,990,688
Tempranillo	381			381			$249,471	$655		897	70%	1,278	$836,653
Other red	2,626	37	701	1,887	1		$1,605,738	$611	24%	3,774	59%	6,400	$3,913,163
Red Total	**120,446**	**37**	**15,793**	**104,615**	**1**		**$78,030,395**	**$648**	**11%**	**53,025**	**31%**	**173,472**	**$112,382,480**

Where fewer than three wineries have reported a variety, the average purchase value is not displayed to protect confidentiality.

Price dispersion 2020 – white varieties

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< $300	$300 to <$600	$600 to <$1500	$1500 to <$2000	$2000+							
White													
Chardonnay	49,146	1,328	47,162	656			$19,667,668	$400	10%	23,917	33%	73,064	$29,239,096
Chenin blanc	128		128								0%	128	$47,114
Colombard	7,300	2,403	4,897				$2,332,652	$320	16%	4,075	36%	11,375	$3,634,695
Fiano	128		101	24	3		$67,065	$524	5%	1,360	91%	1,488	$780,115
Gewurztraminer	121		121								0%	121	$51,221
Muscat a petits grains blancs	1,864		1,812	52			$631,635	$339	2%	206	10%	2,069	$701,345
Muscat Gordo Blanco	15,711	2,313	13,399				$5,117,823	$326	16%	4,385	22%	20,096	$6,546,169
Pinot Gris/Grigio	11,416		10,568	848			$6,004,317	$526	6%	15,920	58%	27,335	$14,377,481
Prosecco	2,306		557	1,750			$1,635,407	$709	30%	1,255	35%	3,561	$2,525,367
Riesling	193		193							375	66%	567	$282,079
Sauvignon Blanc	20,100		19,490	610			$9,302,940	$463	7%	3,278	14%	23,378	$10,820,141
Semillon	3,584	478	3,106				$1,249,710	$349	20%	5,065	59%	8,649	$3,015,864
Verdelho										629	100%	629	$223,240
Vermentino	155		108	46		2	$103,123	$664		407	72%	562	$373,155
Viognier	309		309						-100%	82	21%	391	$147,884
Other white	2,314	194	2,115	4	1		$778,772	$337	17%	1,244	35%	3,558	$1,197,254
White Total	**114,775**	**6,716**	**104,064**	**3,989**	**4**	**2**	**$47,202,199**	**$411**	**11%**	**62,196**	**35%**	**176,971**	**$73,962,220**
Grand Total	**235,221**	**6,753**	**119,857**	**108,604**	**5**	**2**	**$125,232,594**	**$532**	**13%**	**115,221**	**33%**	**350,443**	**$186,438,307**

Where fewer than three wineries have reported a variety, the average purchase value is not displayed to protect confidentiality.

Section 3: Survey respondents

Thank you to the following wineries that reported crushing grapes from Murray Darling and Swan Hill in 2020

Alex Russell Wines	Kingston Estate Wines
Andrew Peace Wines	Limestone Coast Wines
Australian Vintage	McPherson Wines
Austwine Viticulture	Pernod Ricard Winemakers
Barossavale Wines	Pfeiffer Wines
Berton Vineyards	Qualia Wine Services
Best's Wines	Rathbone Wine Group
Bottle In Hand	Redbank Wines
Brown Family Wine Group	S. Smith & Son
Buller Wines	Symphony Hill Wines
Callipari	The Bull Ant Wine Company
Casella Family Brands	The Hidden Creek Consortium
De Bortoli Wines Pty	The Wine Group
Dorrien Estate Winery	Treasury Wine Estates Vintners
Duxton Capital Australia	Trentham Estate
Geppetto Wines	Victorian Alps Wine Company
Growers Wine Group	Weilong Wine Company
Handpicked Vineyards	Westend Estate
Idyll Wine Co	Zilzie Wines

Explanations and definitions

INTRODUCTION

The information for this report has been collected and analysed by Wine Australia as part of the Australian National Vintage Survey. The report has been prepared by Wine Australia on behalf of Murray Valley Winegrowers Inc.

The survey report is available from: www.mvwi.com.au or by contacting Murray Valley Winegrowers on 03 5021 3911

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.

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.

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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PHOTO CREDITS

Murray Valley Winegrowers Inc. (pg 1, 23)

Tourism Victoria (pg 22)

Wine Australia

DEFINITIONS

Total 2020 crush

The total tonnes of grapes grown in or purchased from the Murray Darling & Swan Hill regions and processed either in these regions or elsewhere. All wineries in Australia known to source fruit from Murray Darling/ Swan Hill vineyards were included in the survey collection process. It is estimated that the non-response rate nationally is 9.5%; however, the non-response rate for Murray Darling – Swan Hill is believed to be very low.

Varieties

Where fewer than three wineries have reported a variety, the variety is not identified by name to protect confidentiality.

Purchased Grapes

The total tonnes of grapes purchased from independent grape growers.

Winery Grown Grapes

The total tonnes harvested from winery-owned vineyards.

Total Value of Purchased Grapes

Total value of each individual batch purchased has been provided by the winery. This is the price paid for fruit of a particular variety at the point of receival – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2020).

Average Purchase Price

An average purchase cost per tonne for each variety is calculated by dividing the total value of purchased grapes by the total tonnes of purchased grapes.

Total Value of All Grapes

The estimated total value of all grapes is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value for the same variety across similar regions, or across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

NOTE: rounding of numbers may lead to small discrepancies in totals between tables.