Murray Darling & Swan Hill

Wine Grape Crush Report

2015 Vintage

Murray Valley Winegrape Industry Development Committee

Wine Australia
www.wineaustralia.com

Murray Valley Winegrowers' Inc

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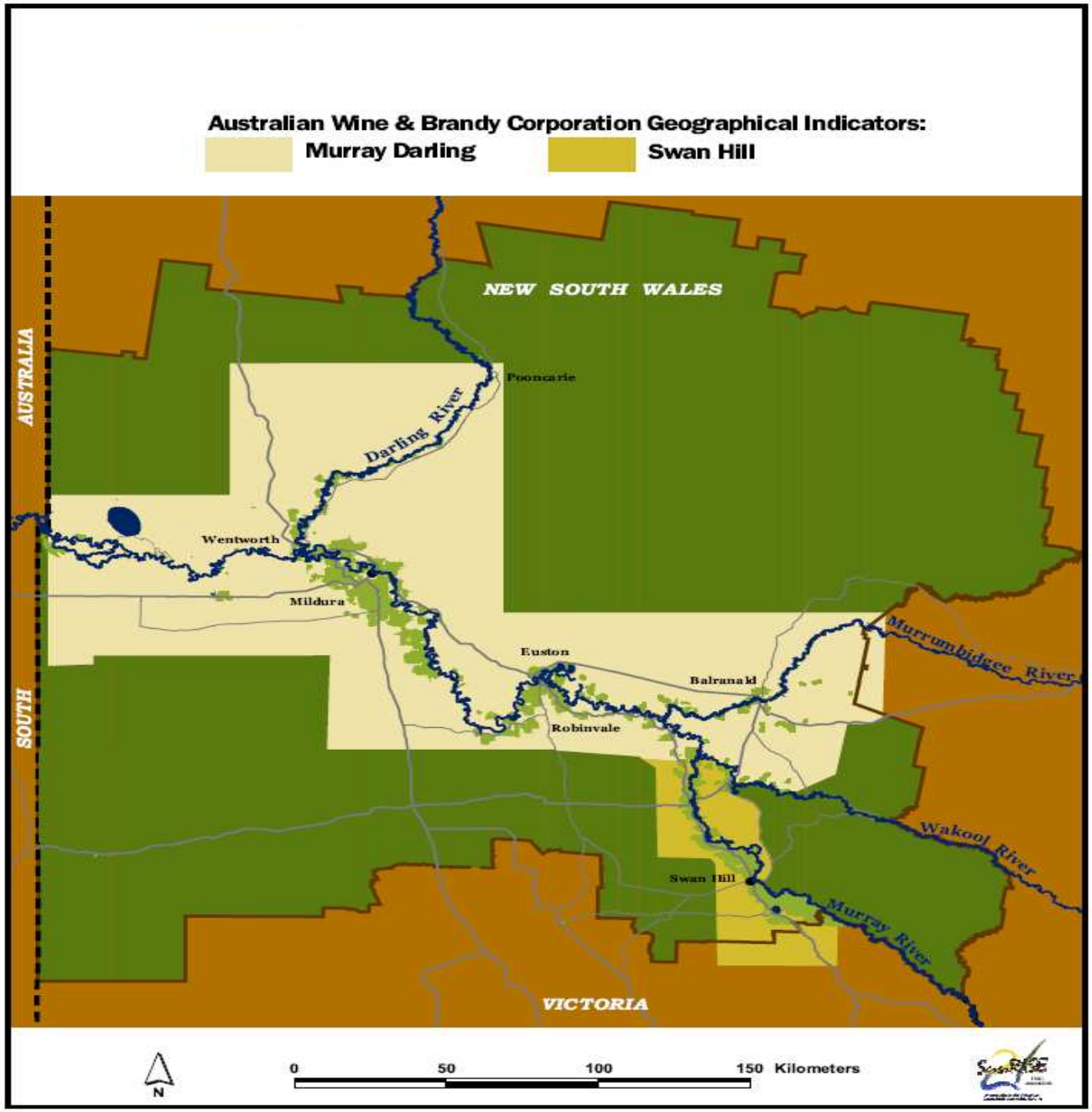
REGIONAL BOUNDARIES



SURVEY DATA COLLECTION & RESULTS

INTRODUCTION

The Murray-Darling and Swan Hill Wine Grape Crush Report is produced by Crowe Horwath for Murray Valley Winegrowers (MVW), and is funded from grower levies paid to the Murray Valley Wine Grape Industry Development Committee (IDC). Data has been drawn from a survey of wineries conducted by Wine Australia.

DATA QUALITY

The 2015 vintage survey was jointly managed by Wine Australia and Crowe Horwath.

All data provided by the wineries has been aggregated. Under an agreement with wineries covering the provision of data, disaggregation is not permitted. It is not possible to provide data from individual wineries.

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DEFINITIONS

Total 2015 Tonnes

Total tonnes of grapes purchased in 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.

Purchased Grapes

The total tonnes of grapes purchases from independent grape growers.

Winery Grown Grapes

The total tonnes harvested from winery owned vineyards.

Tonnes Purchased as a Percentage of Total

This statistic is calculated by dividing the tonnes purchased from growers by the total tonnes crushed. It indicates the proportion of grapes purchased from independent growers.

Total Value of Purchased Grapes

Total value of each variety purchased has been provided by the winery.

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 Winery Grown Grapes

Winery Grown value was calculated using the average value per variety of purchased grapes multiplied by the reported winery grown tonnes.

Total Value of All Grapes

Is the sum of the Total Purchase Value of fruit from independent growers and the Total Value of winery grown grapes.

Section 1: Summary Data and Yearly Trends

GRAPE CRUSH REPORT OVERVIEW

2015 Vintage Survey Results

The total winegrape harvest from the Murray-Darling and Swan Hill regions in 2015 was 381,732 tonnes, 8% less than the 413,627 tonnes harvested in 2014. Of the 381,732 tonnes, 285,402 were purchased from independent growers and 96,330 were harvested and crushed by wineries from their own vineyards.

The total value of wine grapes purchased from independent growers declined 15% ($15.3 million) to $82.1 million. The average purchase price for all varieties declined to $288/tonne, down from $295/tonne in 2014.

The average price of red grape varieties was the lowest in a decade, falling 7% to $297/tonne. The average price of Cabernet Sauvignon was $295/tonne (- 10%), Merlot $293/tonne (- 5%) and Shiraz $289/tonne (- 8%).

The average price of white varieties was $281/tonne, up 2% from $276/tonne in 2014. Of the white varieties, Pinot Gris recorded a solid price increase of 10% to $530/tonne, Chardonnay increased slightly, up 3% to $223/tonne and Sauvignon Blanc rose 2% to $319/tonne.

Chardonnay remains the dominant white variety at 46% of total white winegrape production and Pinot Gris has replaced Sauvignon Blanc as the second highest white variety at 14% of white grape production.

Shiraz (43%), Cabernet (28%) and Merlot (18)% remain the three major red winegrape varieties contributing 89% of the total red winegrape crush.

Of the total crush, winery-owned vineyards contributed 96,330 tonnes, up 16% on the 2014 crush. Purchases from independent growers decreased by 44,985 tonnes (14%) to 285,402 tonnes.

Further analysis of the 2015 survey data indicates:

- The total value of all wine grapes crushed in the designated regions in 2015 is $110.7 million, down from $129.4 million in 2014.
- The composition of the total crush was 61% white varieties and 39% red varieties.
- Purchased tonnes(excluding winery-owned vineyards) comprised 75% of the total crush.
- The value of purchased tonnes comprised 74% of total 2015 crush value.
- White varieties made up 59% (by value) of the total crush.
- Red varieties made up 41% (by value) of the total crush.
- Winery-grown red grapes represented 23% of total red grapes crushed.
- Winery- grown white grapes represented 27% of total white grapes crushed.

Comparison of key 2015 statistics with the 2014 survey indicates :

- Red varieties by total value decreased from 46% to 40% in 2015.
- White varieties by total value increased from 54 % to 60% in 2015.
- Red varieties as a percentage of the total crush decreased from 43% in 2014 to 39% in 2015.
- White varieties as a percentage of the total crush increased from 57% in 2014 to 61% in 2015.

TOTAL TONNES CRUSHED AND TOTAL CROP VALUE

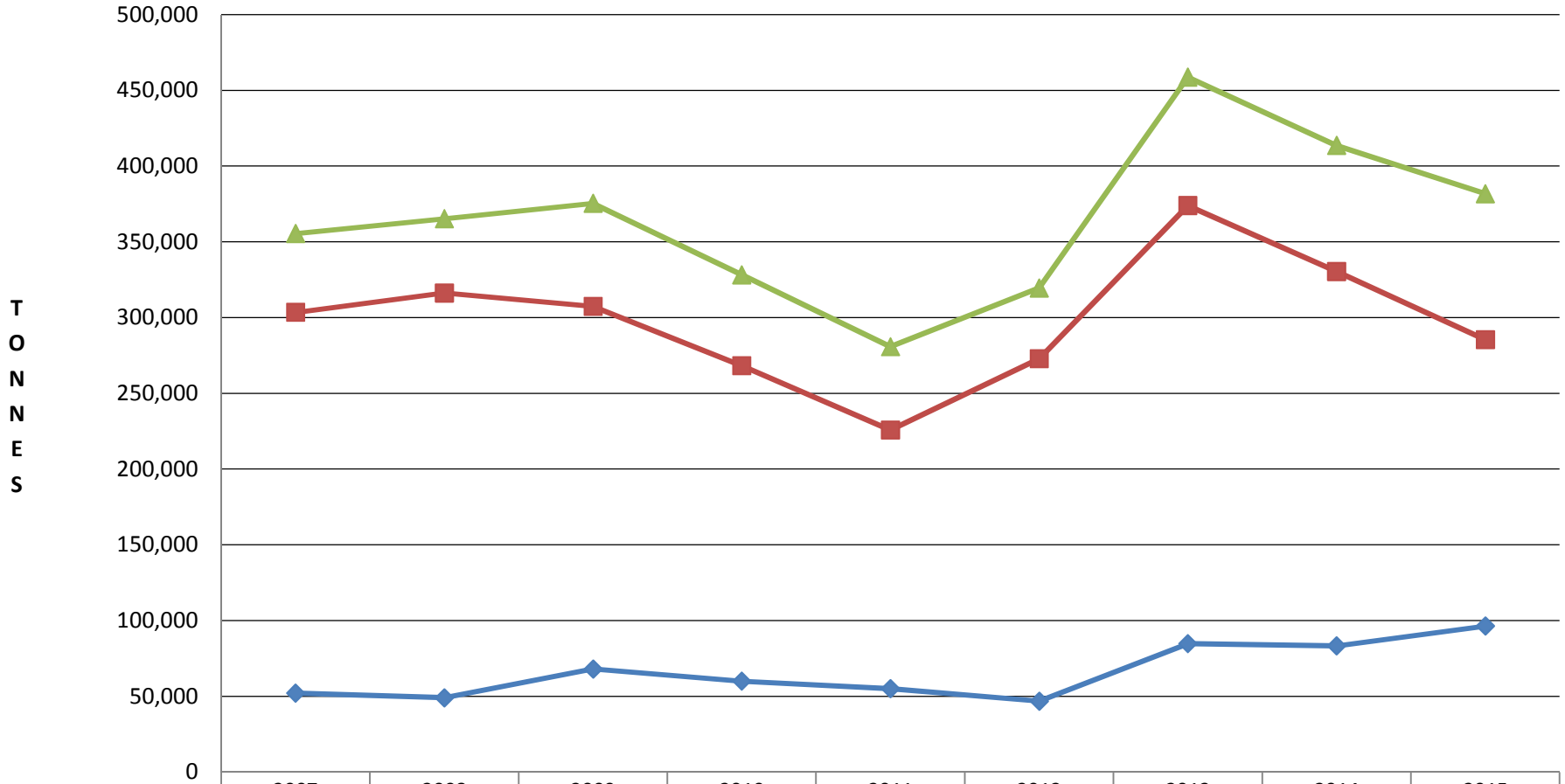
2015 Vintage

	Total Winery Grown Tonnes	Total Purchased Tonnes	Total Crush	Total Value of Purchased fruit	Total Value of Crush	Variety Percentage of Total Value	Variety Percentage of Total Crush	Tonnes Purchased as % of Total	Value Purchased as % of Total
White	61,903	169,669	231,572	$47,717,924	$65,801,755	60%	61%	73%	73%
Red	34,428	115,733	150,160	$34,371,700	$44,754,148	40%	39%	77%	77%
Total Wineries	**96,330**	**285,402**	**381,732**	**$82,089,624**	**$110,555,903**	**100%**	**100%**	**75%**	**74%**

2014 Vintage

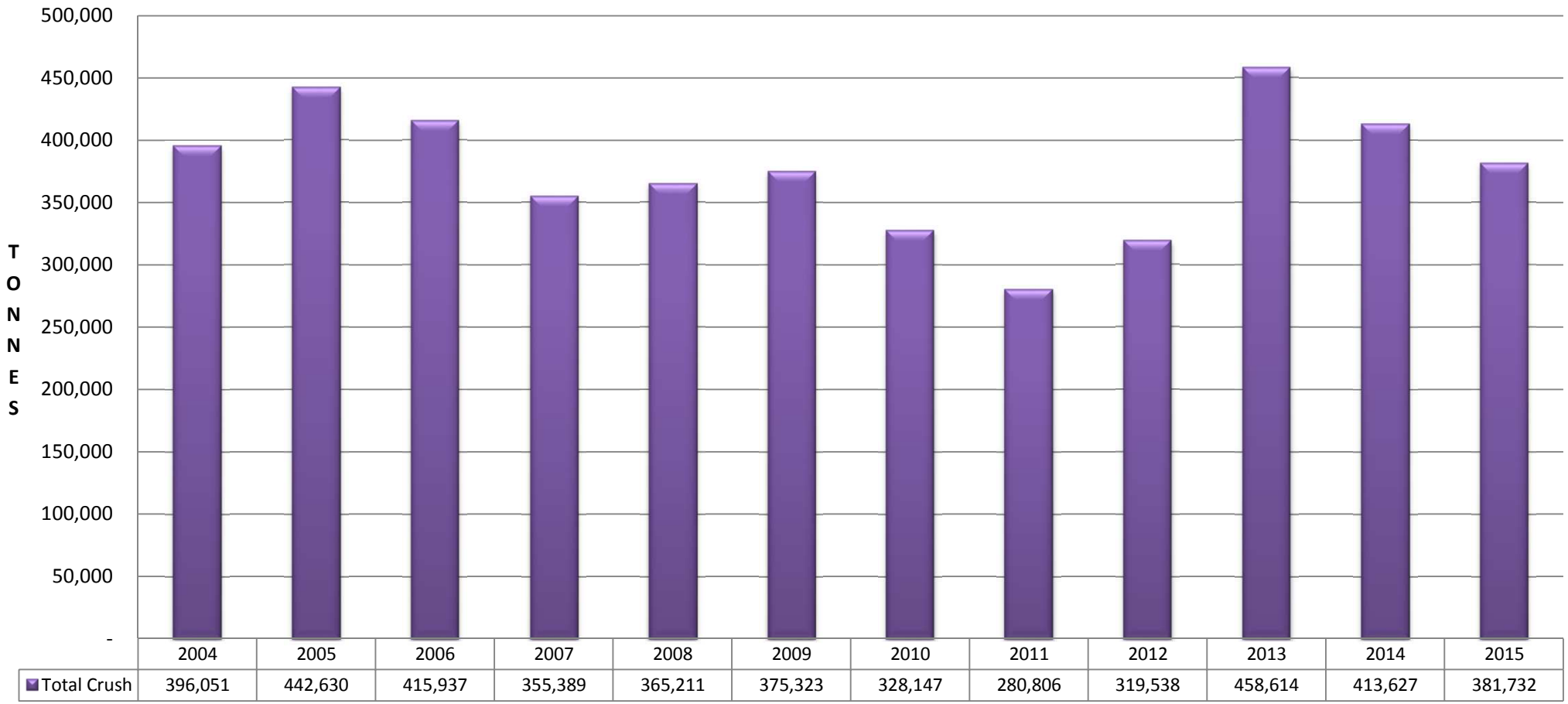
	Total Winery Grown Tonnes	Total Purchased Tonnes	Total Crush	Total Value of Purchased fruit	Total Value of Crush	Variety Percentage of Total Value	Variety Percentage of Total Crush	Tonnes Purchased as % of Total	Value Purchased as % of Total
White	44,334	192,534	236,868	$53,294,006	$70,365,473	54%	57%	81%	76%
Red	38,906	137,853	176,759	$44,146,593	$59,002,097	46%	43%	78%	75%
Total Wineries	**83,240**	**330,387**	**413,627**	**$97,440,599**	**$129,367,570**	**100%**	**100%**	**80%**	**75%**

HISTORICAL TRENDS IN PRODUCTION



	2007	2008	2009	2010	2011	2012	2013	2014	2015
Purchased	303,389	316,211	307,323	268,147	225,806	272,781	373,900	330,387	285,402
Winery Grown	52,000	49,000	68,000	60,000	55,000	46,757	84,714	83,240	96,330
Crushed (totals)	355,389	365,211	375,323	328,147	280,806	319,538	458,614	413,627	381,732

ACTUAL CRUSH TONNAGES SINCE 2004

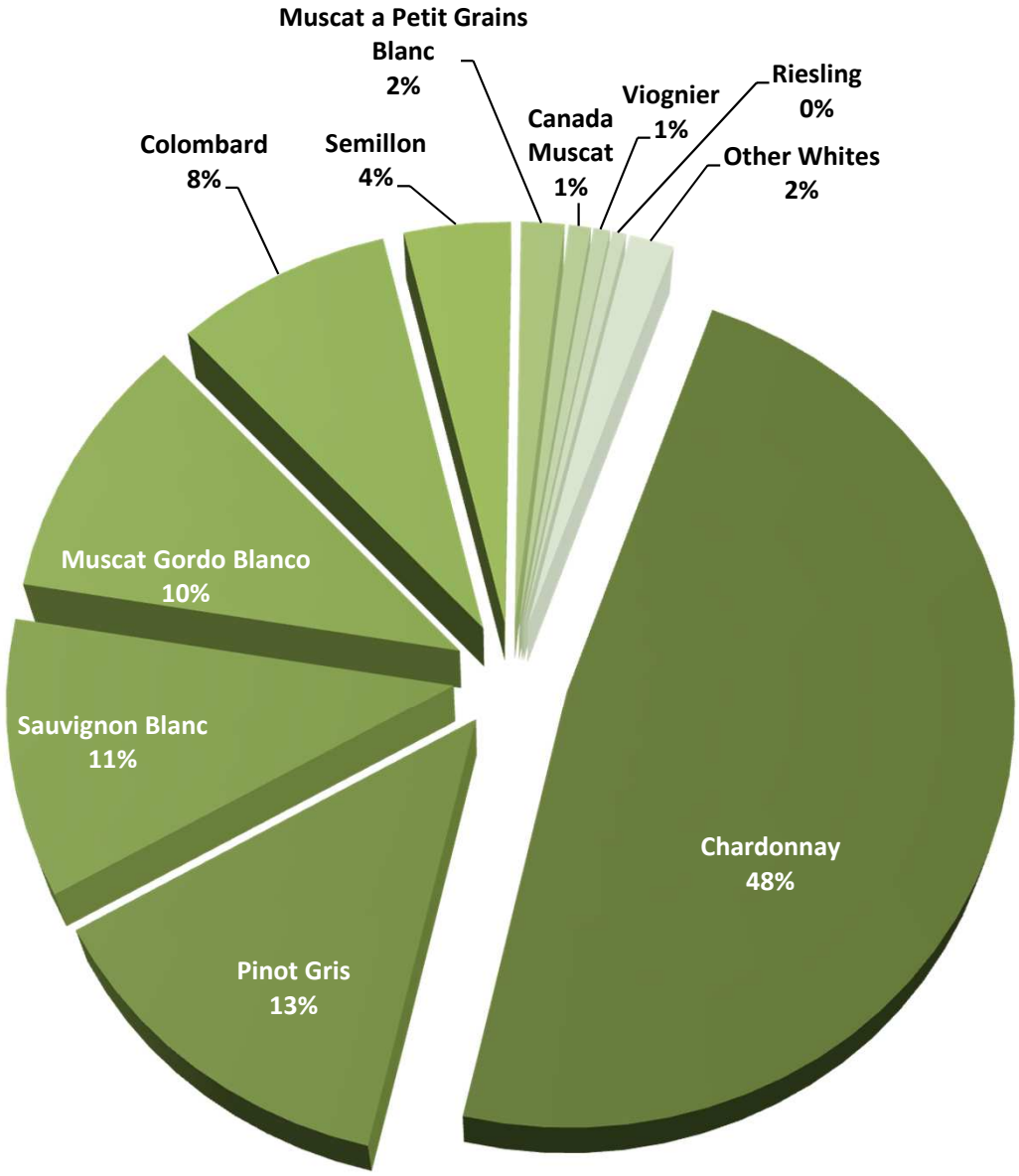


	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Crush	396,051	442,630	415,937	355,389	365,211	375,323	328,147	280,806	319,538	458,614	413,627	381,732

TOTAL TONNES 2015 – PURCHASED– WHITE VARIETIES

WHITES	Purchased
Chardonnay	81,630
Pinot Gris	22,411
Sauvignon Blanc	18,131
Muscat Gordo Blanco	17,654
Colombard	13,965
Semillon	6,842
Muscat a Petit Grains Blanc	2,772
Canada Muscat	1,405
Viognier	1,068
Riesling	906
Other Whites	2,885
TOTAL Whites	**169,669**

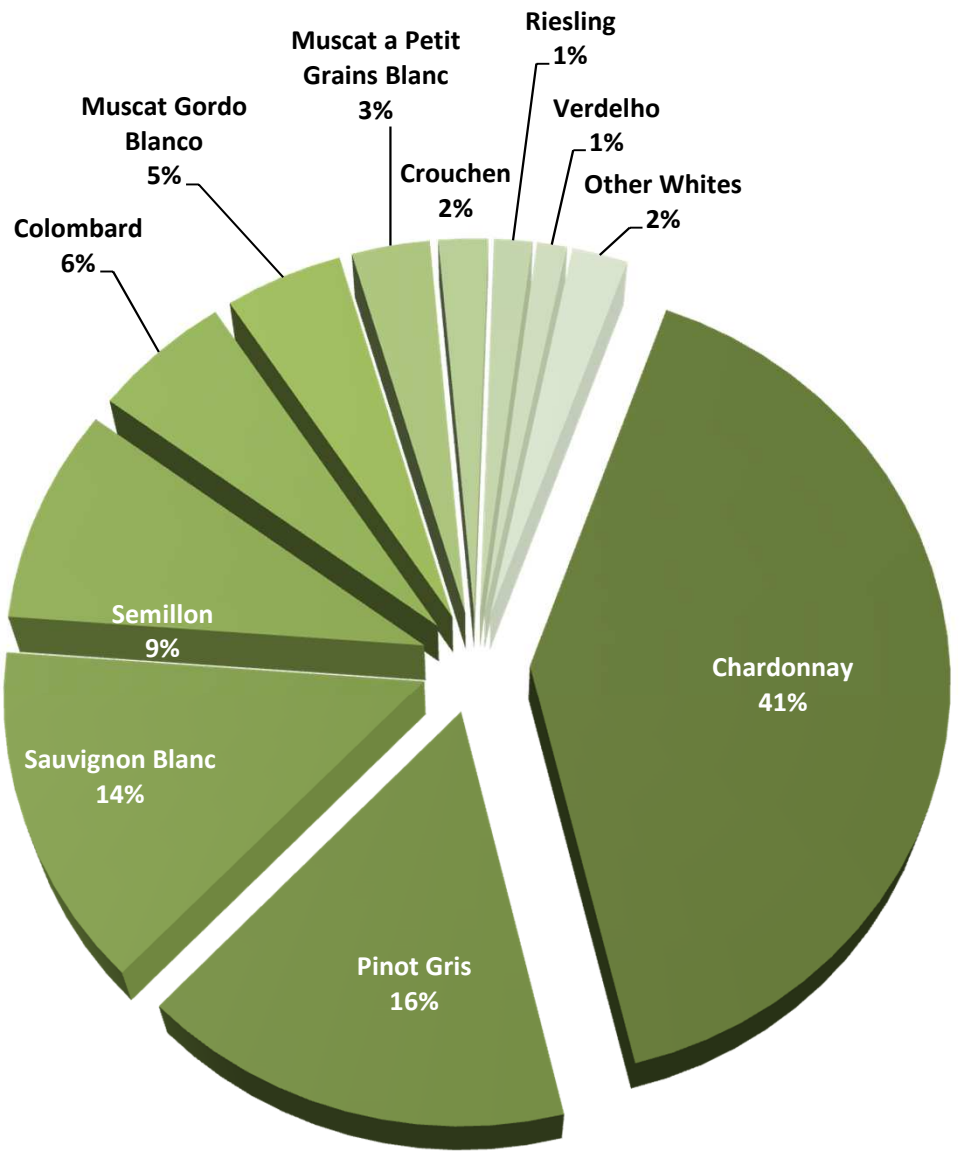
Other Whites Summary	
Vermentino	658
Fiano	657
Crouchen	398
Prosecco	358
Sultana	297
Chenin Blanc	232
Traminer	140
Verdelho	108
Muscadelle	24
Arneis	13



TOTAL TONNES 2015 – WINERY GROWN – WHITE VARIETIES

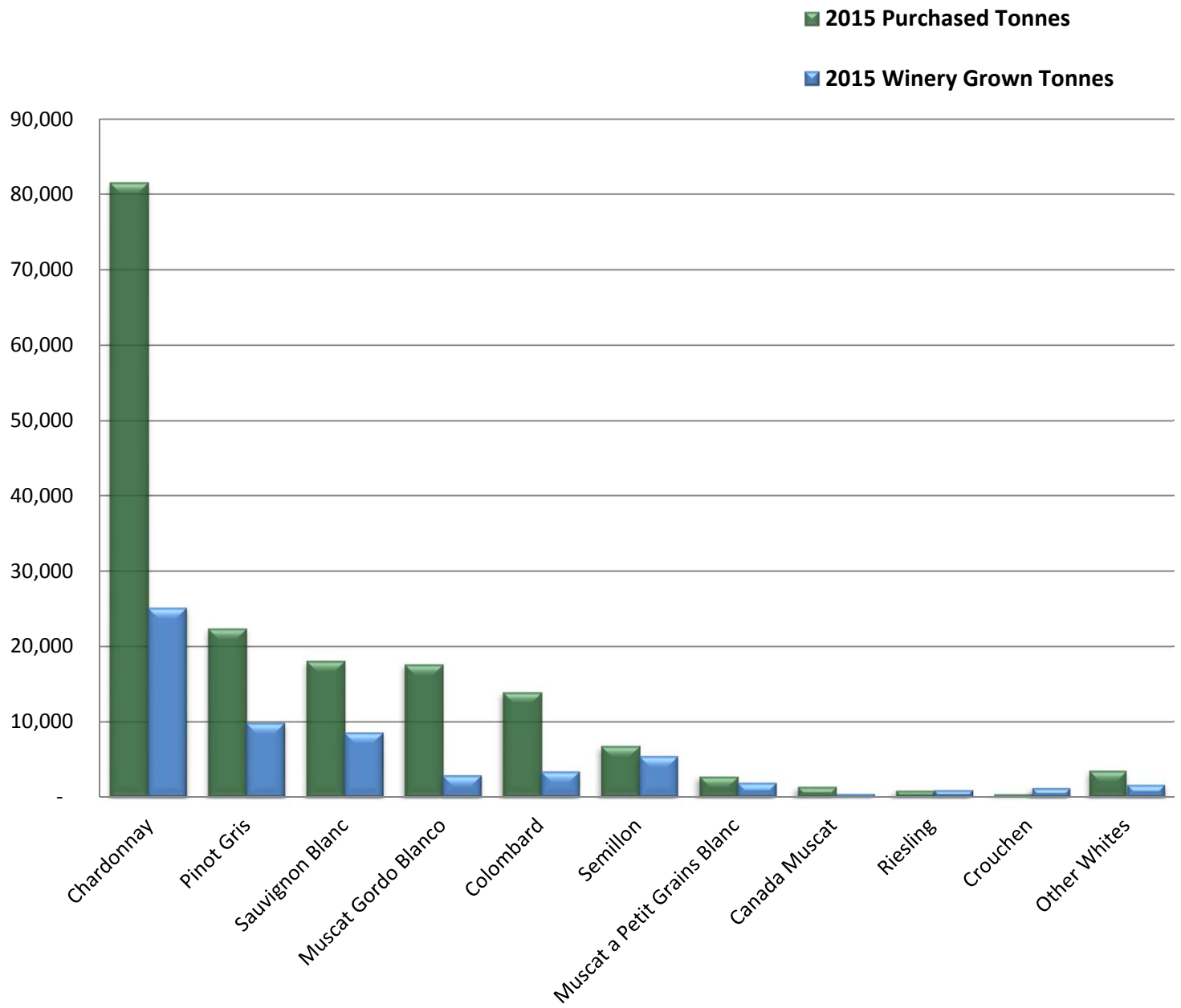
WHITES	Winery Grown (Tonnes)
Chardonnay	25,163
Pinot Gris	9,918
Sauvignon Blanc	8,634
Semillon	5,511
Colombard	3,463
Muscat Gordo Blanco	2,946
Muscat a Petit Grains Blanc	1,946
Crouchen	1,231
Riesling	951
Verdelho	748
Other Whites	1,392
TOTAL Whites	**61,903**

Other Whites Summary	
Canada Muscat	466
Fiano	358
Viognier	333
Chenin Blanc	131
Prosecco	58
Miscellaneous	21
Vermentino	15
Taminga	10



TOTAL TONNES 2015 – TOP TEN PURCHASED WHITE VARIETIES vs. WINERY GROWN

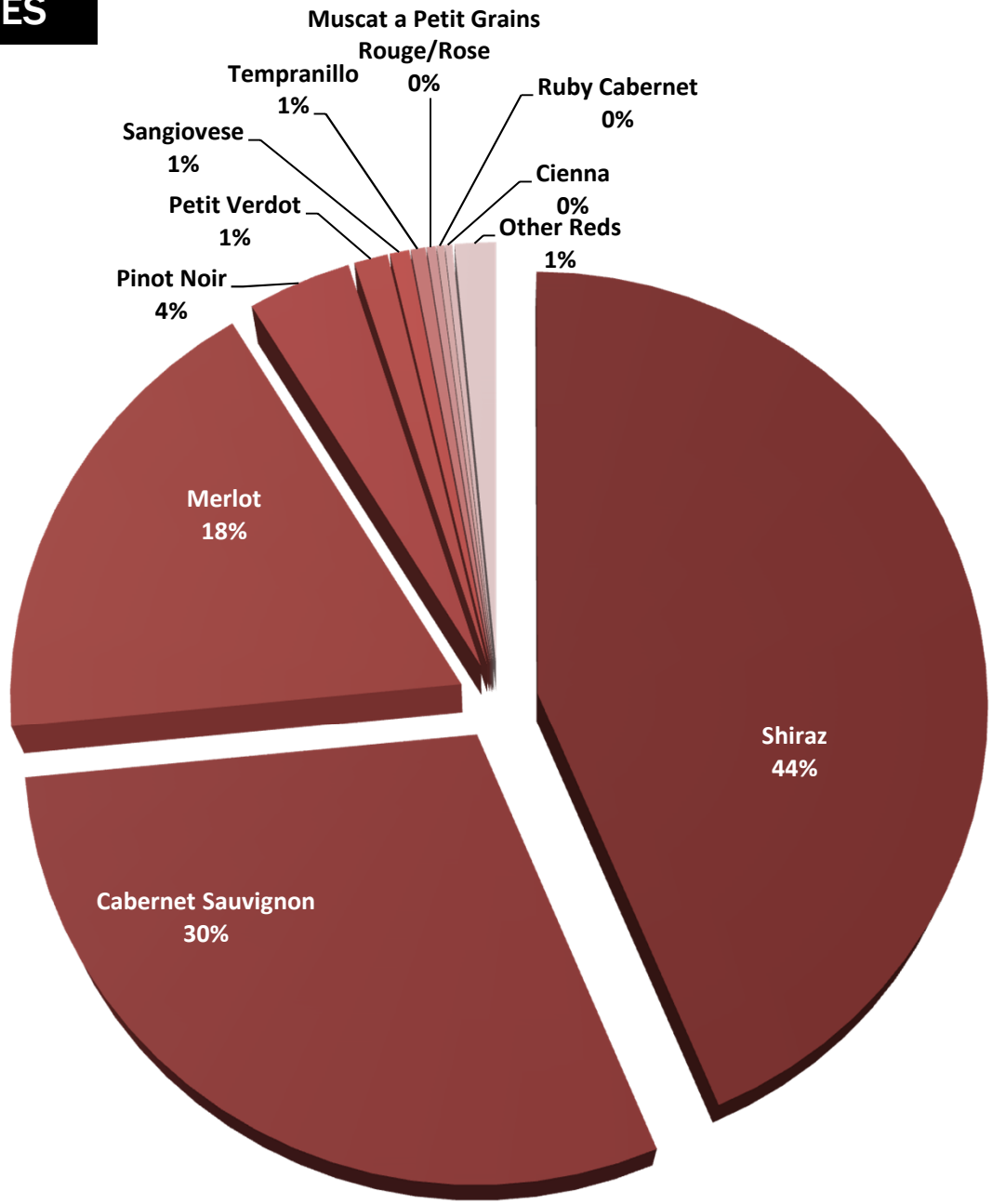
WHITES	Purchased	Winery Grown
Chardonnay	81,630	25,163
Pinot Gris	22,411	9,918
Sauvignon Blanc	18,131	8,634
Muscat Gordo Blanco	17,654	2,946
Colombard	13,965	3,463
Semillon	6,842	5,511
Muscat a Petit Grains Blanc	2,772	1,946
Canada Muscat	1,405	466
Riesling	906	951
Crouchen	398	1,231
Other Whites	3,555	1,674
TOTAL Whites	**169,669**	**61,903**



TOTAL TONNES 2015 –PURCHASED – RED VARIETIES

REDS	Purchased (Tonnes)
Shiraz	50,540
Cabernet Sauvignon	34,451
Merlot	20,599
Pinot Noir	4,455
Petit Verdot	1,446
Sangiovese	829
Tempranillo	628
Muscat a Petit Grains Rouge/Rose	393
Ruby Cabernet	322
Cienna	315
Other Reds	1,756
Total Reds	**115,733**

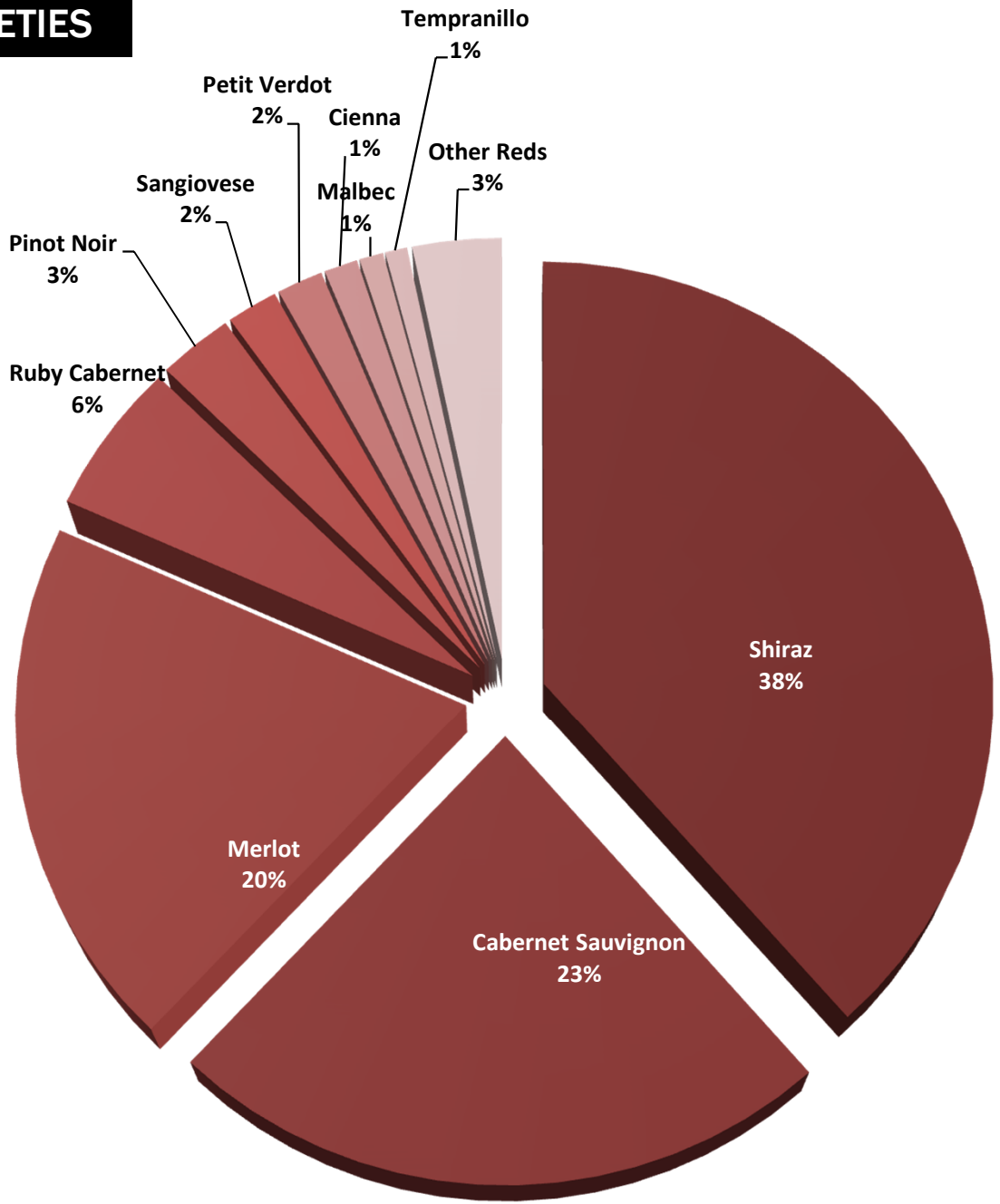
Other Reds Summary	
Grenache	285
Nero d'Avola	267
Durif	226
Negro Amaro	200
Malbec	174
Montepulciano	169
Graciano	149
Muscat a Petit Grains Blanc	56
Tarrango	55
Carmenere	48
Lagrein	32
Sagrantino	31
Dolcetto	29
Cabernet Franc	14
Lambrusco	10
Tannat	9
Refosco dal Peduncolo Rosso	1



TOTAL TONNES 2015 – WINERY GROWN – RED VARIETIES

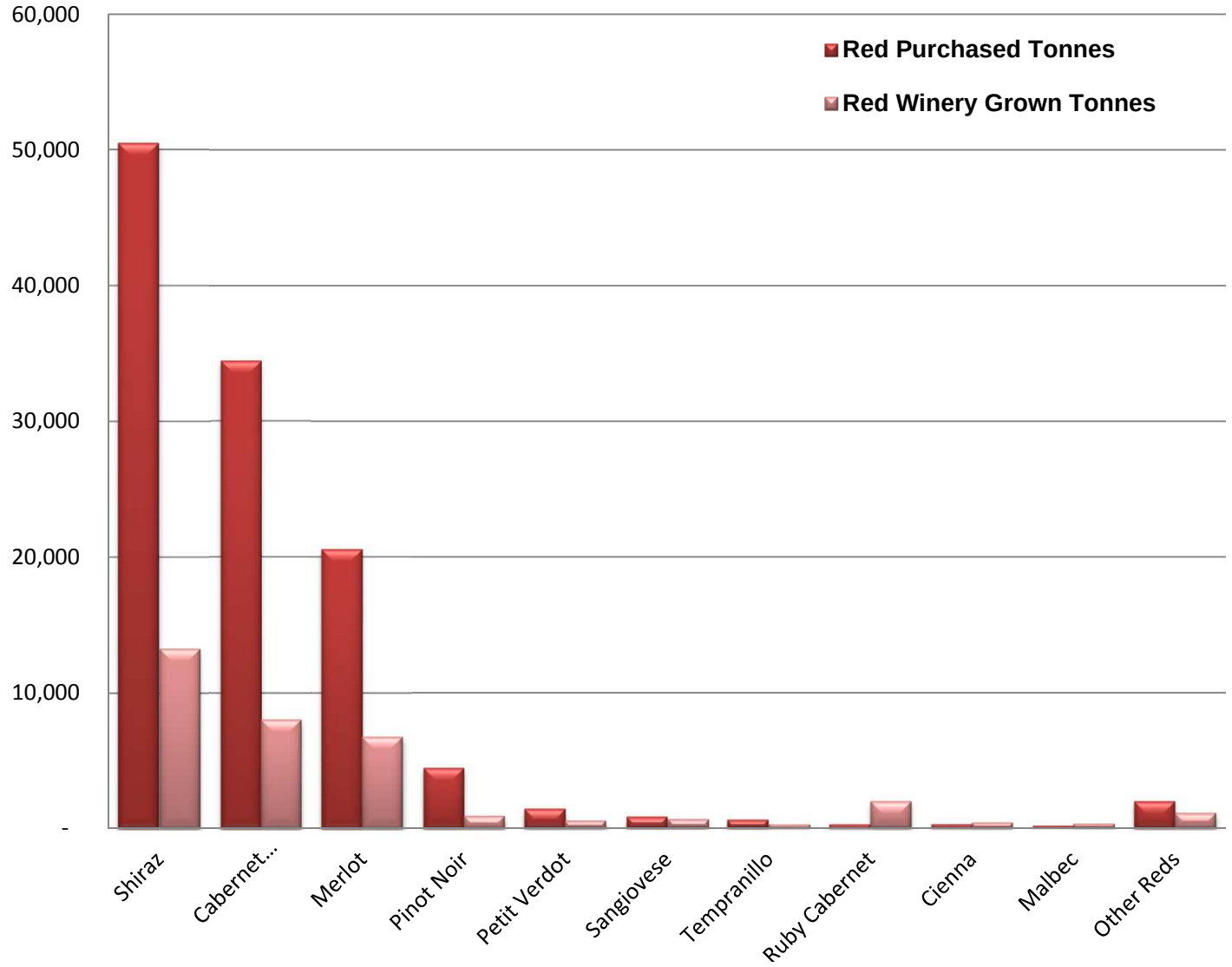
REDS	Winery Grown (Tonnes)
Shiraz	13,280
Cabernet Sauvignon	8,051
Merlot	6,786
Ruby Cabernet	1,964
Pinot Noir	954
Sangiovese	651
Petit Verdot	588
Cienna	429
Malbec	307
Tempranillo	282
Other Reds	1,136
Total Reds	**34,428**

Other Reds Summary	
Rubired	217
Dolcetto	182
Tarrango	127
Lambrusco	113
Grenache	102
Mataro	82
Sagrantino	65
Nebbiolo	62
Durif	50
Montepulciano	48
Tannat	36
Other red	23
Nero d'Avola	22
Muscat a Petit Grains Blanc	4
Saperavi	2



TOTAL TONNES 2015 – TOP 10 PURCHASED RED VARIETIES vs. WINERY GROWN

REDS	Purchased (Tonnes)	Winery Grown (Tonnes)
Shiraz	50,540	13,280
Cabernet Sauvignon	34,451	8,051
Merlot	20,599	6,786
Pinot Noir	4,455	954
Ruby Cabernet	322	1,964
Petit Verdot	1,446	588
Sangiovese	829	651
Tempranillo	628	282
Cienna	315	429
Malbec	174	307
Other Reds	1,974	1,136
Total Reds	**115,733**	**34,428**

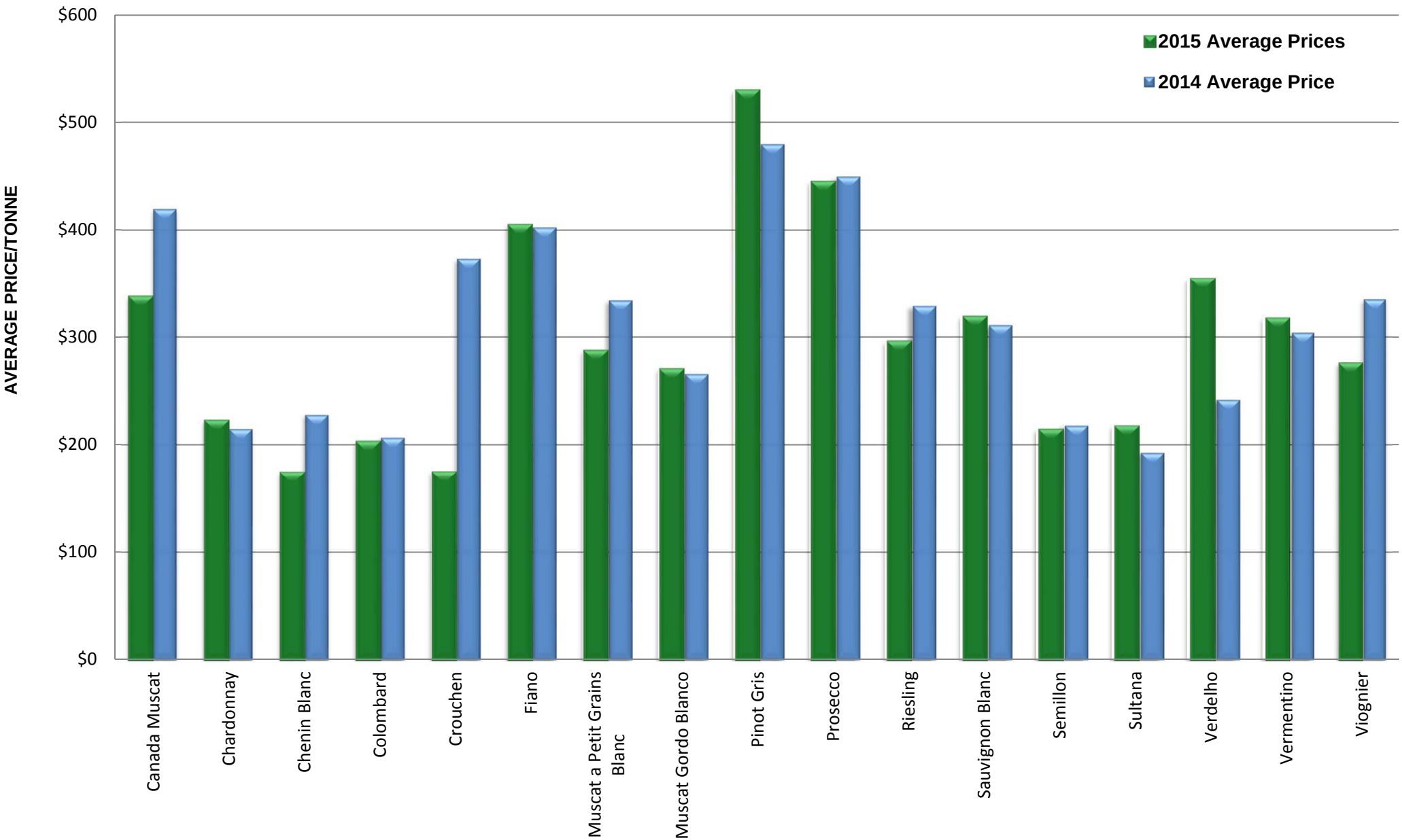


Section 2: Wine Grape Value and Tonnage Data 2015

INTAKE AND PRICE SUMMARY DATA BY VARIETY FOR WHITE GRAPES

Variety	PURCHASED GRAPE SUMMARY			WINERY	2015 TOTAL			2014 SUMMARY		
	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	Tonnes as % of Total Whites
Canada Muscat	1,405	$474,950	$338	466	1,871	$632,472	1%	$420	2,990	1%
Chardonnay	81,630	$18,206,201	$223	25,163	106,793	$23,818,408	46%	$216	105,461	45%
Chenin Blanc	232	$40,540	$174	131	363	$63,415	0%	$229	341	0%
Colombard	13,965	$2,839,450	$203	3,463	17,428	$3,543,631	8%	$208	15,010	6%
Crouchen	398	$69,661	$175	1,231	1,629	$285,056	1%	$374	1,088	0%
Fiano	657	$266,139	$405	358	1,016	$411,298	0%	$403	1,184	0%
Muscat a Petit Grains Blanc	2,772	$797,484	$288	1,946	4,718	$1,357,266	2%	$335	470	0%
Muscat Gordo Blanco	17,654	$4,776,403	$271	2,946	20,601	$5,573,590	9%	$267	25,727	11%
Pinot Gris	22,411	$11,876,567	$530	9,918	32,329	$17,132,346	14%	$480	32,506	14%
Prosecco	358	$159,205	$445	58	415	$184,861	0%	$450	99	0%
Riesling	906	$268,336	$296	951	1,856	$549,977	1%	$330	1,651	1%
Sauvignon Blanc	18,131	$5,789,231	$319	8,634	26,765	$8,546,264	12%	$312	28,230	12%
Semillon	6,842	$1,467,238	$214	5,511	12,353	$2,649,047	5%	$219	12,521	5%
Sultana	297	$64,635	$218	-	297	$64,635	0%	$194	457	0%
Verdelho	108	$38,495	$355	748	856	$303,776	0%	$243	797	0%
Vermentino	658	$209,165	$318	15	673	$213,848	0%	$305	749	0%
Viognier	1,068	$294,502	$276	333	1,401	$386,323	1%	$336	1,312	1%
OTHER WHITES under 200 tonne	176	$79,725		31	207	$85,541	0%		6,275	3%
										$0
TOTAL	**169,669**	**$47,717,924**		**61,903**	**231,572**	**$ 65,801,755**	**100%**		**236,868**	**100%**

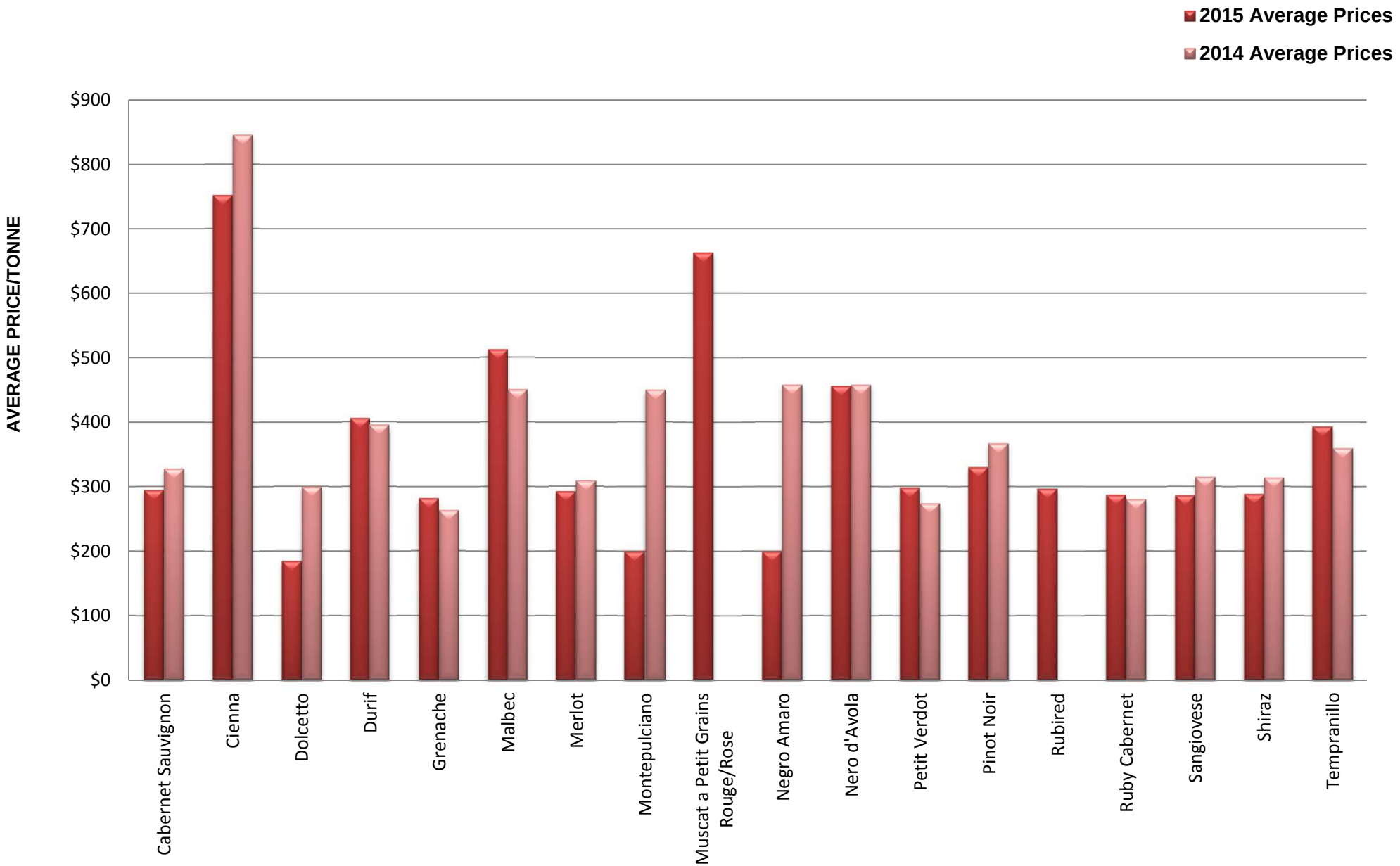
AVERAGE PURCHASE PRICE PER TONNE -WHITE VARIETIES



INTAKE AND PRICE SUMMARY DATA BY VARIETY FOR RED GRAPES 2015

Variety	PURCHASED GRAPE SUMMARY			WINERY	2015 TOTAL			2014 SUMMARY		
	Purchased tonnes	Value of Fruit Purchased	Average Purchase Price	Winery Grown tonnes	Total Tonnes	Total Value	Tonnes as % of Total	Average Purchase Price	Total Tonnes	Tonnes as % of Total Whites
Cabernet Sauvignon	34,451	$10,164,942	$295	8,051	42,502	$12,540,416	28%	$328	47,640	27%
Cienna	315	$236,951	$753	429	744	$560,241	0%	$846	407	0%
Dolcetto	29	$5,314	$185	182	210	$38,924	0%	$300	278	0%
Durif	226	$91,804	$406	50	276	$112,227	0%	$396	214	0%
Grenache	284	$80,028	$281	102	386	$108,628	0%	$263	303	0%
Malbec	174	$89,080	$513	307	481	$246,680	0%	$451	349	0%
Merlot	20,599	$6,026,220	$293	6,786	27,385	$8,011,486	18%	$309	33,350	19%
Montepulciano	169	$33,856	$200	48	217	$43,444	0%	$450	98	0%
Muscat a Petit Grains Rouge/Rose	392	$260,365	$664	-	392	$260,365	0%	$0	-	0%
Negro Amaro	200	$40,064	$200	-	200	$40,064	0%	$458	133	0%
Nero d'Avola	267	$121,752	$456	22	289	$131,806	0%	$458	234	0%
Petit Verdot	1,446	$431,564	$299	588	2,033	$607,014	1%	$274	2,818	2%
Pinot Noir	4,455	$1,472,379	$330	954	5,409	$1,787,606	4%	$367	5,184	3%
Rubired	-	$0	$297	217	217	$64,349	0%	$0	-	0%
Ruby Cabernet	322	$92,240	$287	1,964	2,286	$655,674	2%	$280	2,846	2%
Sangiovese	829	$237,697	$287	651	1,479	$424,285	1%	$315	577	0%
Shiraz	50,540	$14,585,730	$289	13,280	63,819	$18,418,200	43%	$314	78,685	45%
Tempranillo	628	$247,441	$394	282	911	$358,586	1%	$360	2,346	1%
OTHER RED VARIETIES under 200 tonnes	406	$154,275		516	922	$344,153	1%		1,297	1%
TOTAL	**115,733**	**$ 34,371,700**		**34,428**	**150,160**	**$ 44,754,148**	**100%**		**176,759**	**100%**

AVERAGE PRICE PER TONNE - RED VARIETIES



List of wineries returning survey forms

THANK YOU TO THE FOLLOWING WINERIES THAT RESPONDED TO THE 2015 SURVEY

Accolade Wines	McWilliams Wines
Andrew Peace Wines	Montalto Vineyards
Angove Family Winemakers	Pernod Ricard Winemakers
Australian Vintage	Psyche Wines Pty Ltd
Austwine	Qualia Wine Services
Berton Vineyards	Summit Estate Wines
Best's Wines	Treasury Wine Estates
Brown Brothers	Trentham Estate
Buller Wines	TWG Australia (Loxton)
Casella Wines	Victorian Alps Winery
CM & RH Pfeiffer	Vin 888
De Bortoli Wines	Vinteloper
Dorrien Estate	Warburn Estate
Kingston Estate Wines	Wingara Wine Group
Limestone Coast Wines	Yalumba Wine Company
Littore Family Wines	Zilzie Wines
McPherson Wines	