Murray Valley Winegrowers

Murray Darling & Swan Hill

Wine Grape Crush Report

2024 Vintage

Murray Valley Winegrape Industry Development Committee

iDC

July 2024

Wine Australia

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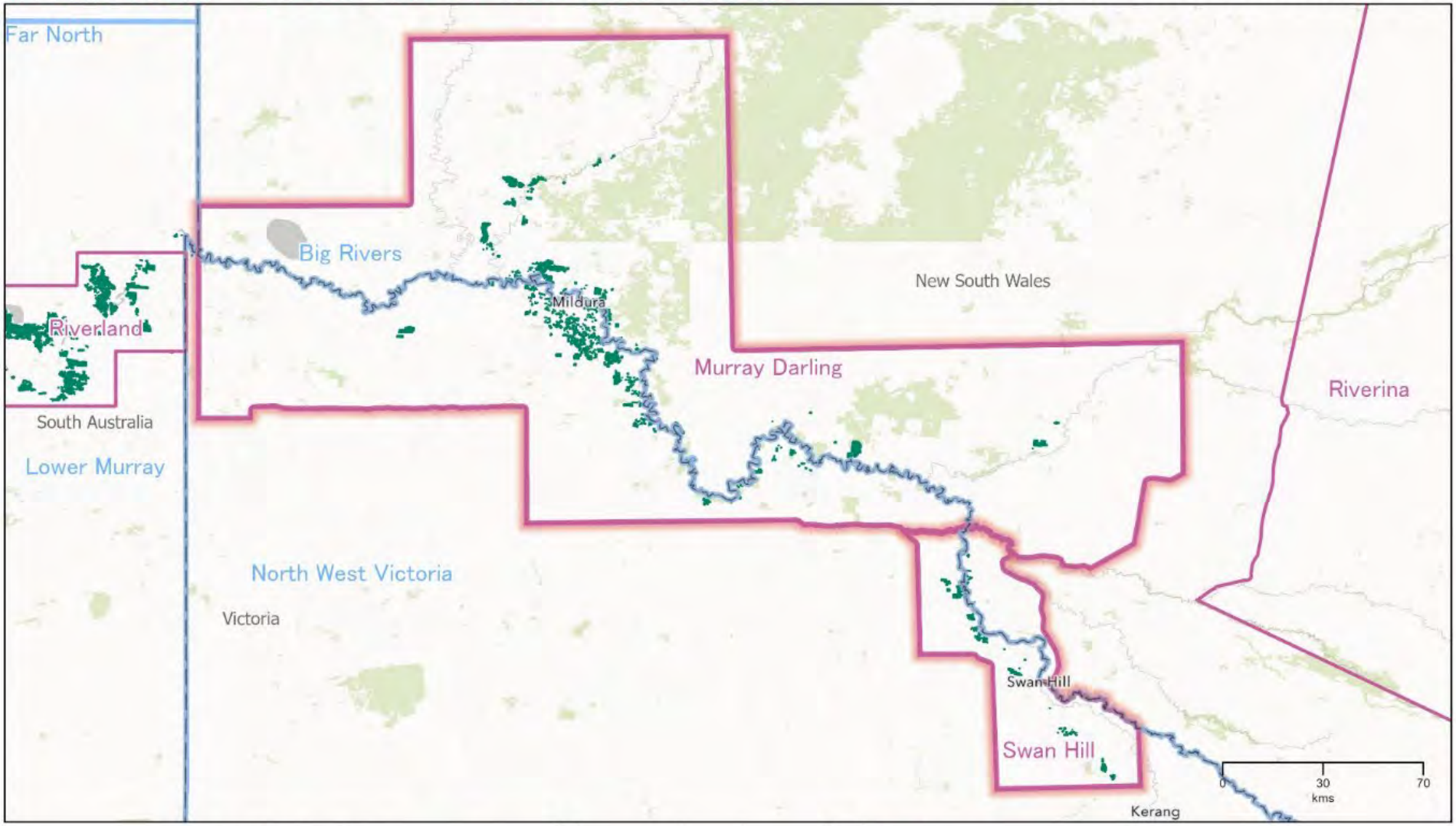
MURRAY DARLING-SWAN HILL

Victoria-New South Wales



Wine Australia for Australian Wine

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Map produced by Locatable Solutions Pty Ltd, June 2020

GI Regions
GI Zones
Vineyards (GAIA 2019)

This map provides a visual representation of the Geographical Indication (GI) boundary defined in the textual description for this GI. The textual description is the legal definition of the GI and in case of any discrepancy or ambiguity, the textual description prevails.

GAIA agricultural intelligence

SECTION 1

SUMMARY DATA AND YEARLY TRENDS

Season report – vintage 2024

For growers in the Murray Valley this year, weather conditions were the least of their concerns.

While still challenging, growing conditions in the region were nowhere near as difficult as the previous vintage.

The season started out fairly dry, providing ideal conditions for pruning and preparing the vineyards for the vintage. Budburst came earlier than in the previous few years, which is suspectedly due to the dry spell early in the season.

Spring brought clear weather without too much rain, alleviating the downy mildew concerns growers had in hangover from the 2023 season. Soil temperatures were quick to pick up, which also meant growers staved off the risk of chlorosis brought on by nutrient deficiencies.

Probably the most challenging and abnormal part of the season was around Christmas, which is when the region experienced significant concentrated rainfall. Between Christmas and Australia Day around eight inches fell, which was unusual for the region, with January generally being its driest month.

The brief spell of rain was enough to lift irrigation pressure in January, resulting in lower water use for the entire season.

Thankfully the rain was short-lived, and did not return before the end of harvest, which kept disease pressures to a minimum.

There was a contrast in ripening and crop yield compared to previous years, depending on choices made about inputs. The circumstances of the industry meant that a lot of people chose not to put a lot of inputs in, and that corresponded to lesser crops, and, to a lesser extent, quality issues.

Despite these challenges, the 2024 vintage has produced a promising crop, particularly in white varieties. Winemakers are pleased with the quality, with Pinot Gris and Sauvignon Blanc standing out for their varietal characteristics.

Vintage statistics 2024

The total wine grape harvest from the Murray Darling and Swan Hill (MD-SH) regions in 2024 was 282,338 tonnes, an increase of 38 per cent compared with 2023 but still 14 per cent below the 5-year average of 326,903 tonnes. It was the second-smallest reported crush for at least 10 years.

Nationally, the 2024 vintage was 1.43 million tonnes, an increase of 9 per cent compared with the 23-year-low crush in 2023, but still 18 per cent below the 10-year average of 1.73 million tonnes.

Murray Darling and Swan Hill together accounted for 22 per cent of the national reported crush; 28 per cent of the white crush and 16 per cent of the red crush.

Victoria accounted for 58 per cent of the Murray Darling – Swan Hill crush, up from 53 per cent in 2023.

Purchased grapes accounted for 70 per cent of the crush from Victorian MD-SH in 2024 compared with 68 per cent in 2023. In NSW, purchased grapes accounted for 42 per cent of the MD-SH crush, down from 63 per cent in 2023.

The crush of winery-owned fruit in MD-SH increased by 67 per cent compared with the very low 2023 crush, while the crush of grapes purchased from independent growers increased by 22 per cent. The biggest increase came from winery-grown tonnes from the NSW side of the Murray Darling and Swan Hill GIs (up 93 per cent).

The crush of red grapes was up by 15 per cent overall, while the white crush increased by 55 per cent, causing the white share of the total crush to increase from 57 per cent in 2023 to 64 per cent. This is significantly higher than the average share of whites nationally, which was 51 per cent in 2024. The fact that whites increased by much more than reds suggests that the composition of the crush was driven by economic and market forces more than seasonal factors.

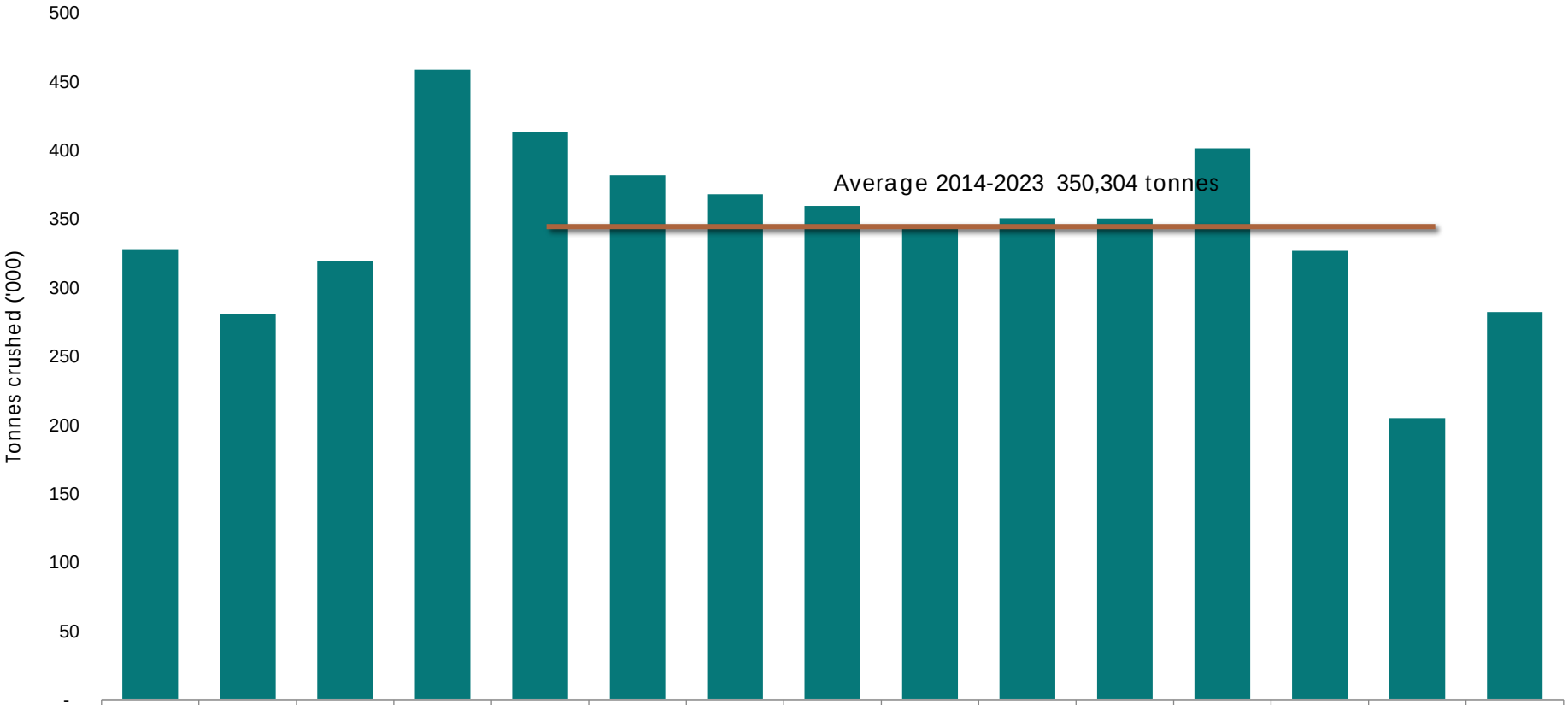
Chardonnay was the largest variety, with a crush of 82,306 tonnes, an increase of 63 per cent year-on-year. Of the top 10 varieties, Shiraz was the only one that declined (down 9 per cent), while the largest increases were for Merlot (up 80 per cent), Pinot Gris/Grigio (up 79 per cent) and Colombard (up 64 per cent). The reported crush of Sauvignon Blanc was only 447 tonnes less than third-placed Cabernet Sauvignon, with Pinot Gris/Grigio just another 786 tonnes further behind.

The overall average purchase value for the Murray Darling and Swan Hill regions decreased by 4 per cent from $412 per tonne to $395 per tonne. Both reds (down 5 per cent) and whites (down 6 per cent) decreased by similar percentages, but the average value for whites was $55 per tonne higher than for reds.

Of the top 10 varieties, the smallest declines in average value were for Muscat Gordo Blanco and Pinot Gris/Grigio (both down less than 1 per cent), while Colombard increased by 3 per cent.

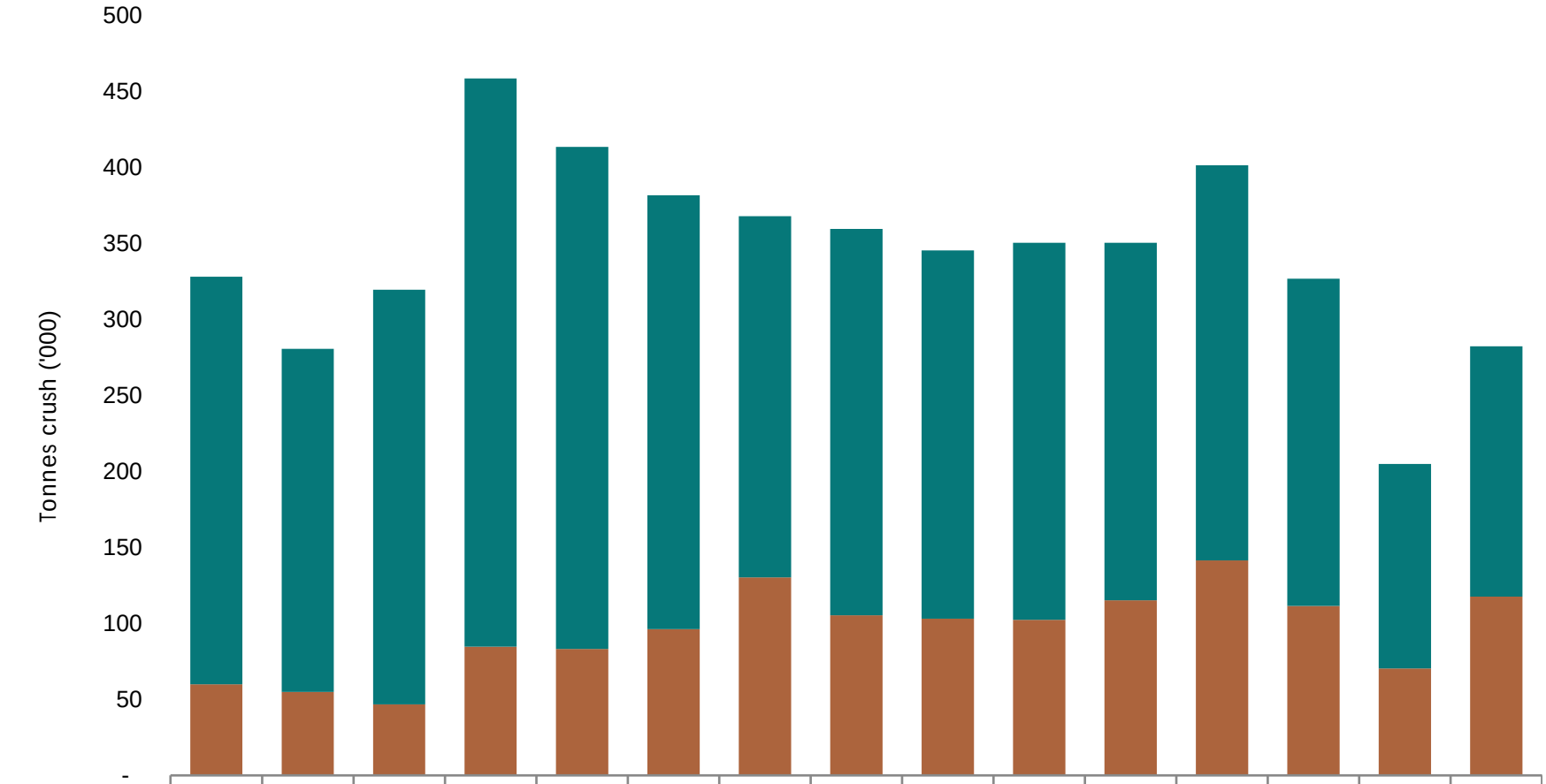
The value of the crush from Murray Darling and Swan Hill increased by $27.5 million (33 per cent) from $83.5 million in 2023 to $110 million in 2024 as a result of the increased tonnage partly offset by the decrease in average value. The value of purchased grapes increased by 17 per cent (just under $10 million) from $55.5 million to $65.1 million.

Crush from the Murray Darling and Swan Hill regions 2010-2024



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Crush	328,147	280,806	319,538	458,614	413,627	381,732	368,097	359,614	345,459	350,568	350,442	401,560	326,882	205,060	282,338

Historical trends in production – winery grown vs purchased fruit 2010-2024



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Purchased	268,147	225,806	272,781	373,900	330,387	285,402	237,678	254,160	242,276	248,144	235,221	260,065	215,423	134,584	164,710
Winery Grown	60,000	55,000	46,757	84,714	83,240	96,330	130,419	105,454	103,183	102,424	115,221	141,495	111,459	70,476	117,628

Vintage summary 2024 vs 2023

2024 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	52,617	49,756	102,373	17,745,272	35,783,007	32%	36%	49%	50%
White	65,011	114,954	179,965	47,375,444	75,249,019	68%	64%	64%	63%
Total crush	117,628	164,710	282,338	65,120,715	111,032,026	100%	100%	58%	59%

2023 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	33,240	55,575	88,815	20,776,971	32,975,103	40%	43%	63%	63%
White	37,236	79,009	116,245	34,717,972	50,499,228	60%	57%	68%	69%
Total crush	70,476	134,584	205,061	55,494,943	83,474,331	100%	100%	66%	66%

Vintage summary 2024 by component states within the Murray Darling & Swan Hill GI regions

2024 Vintage Murray Darling - Swan Hill NSW

	Total Winery Grown Tonnes	Total Purchased Tonnes	Total Crushed Tonnes	Total value of Purchased Fruit	Total Value of Crush	Colour % of Total Value	Colour % of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
Red	23,937	14,384	38,321	4,231,848	11,438,353	24%	32%	38%	37%
White	45,129	35,562	80,692	15,739,854	35,511,185	76%	68%	44%	44%
Total crush	69,067	49,946	119,013	19,971,702	46,949,538	100%	100%	42%	43%

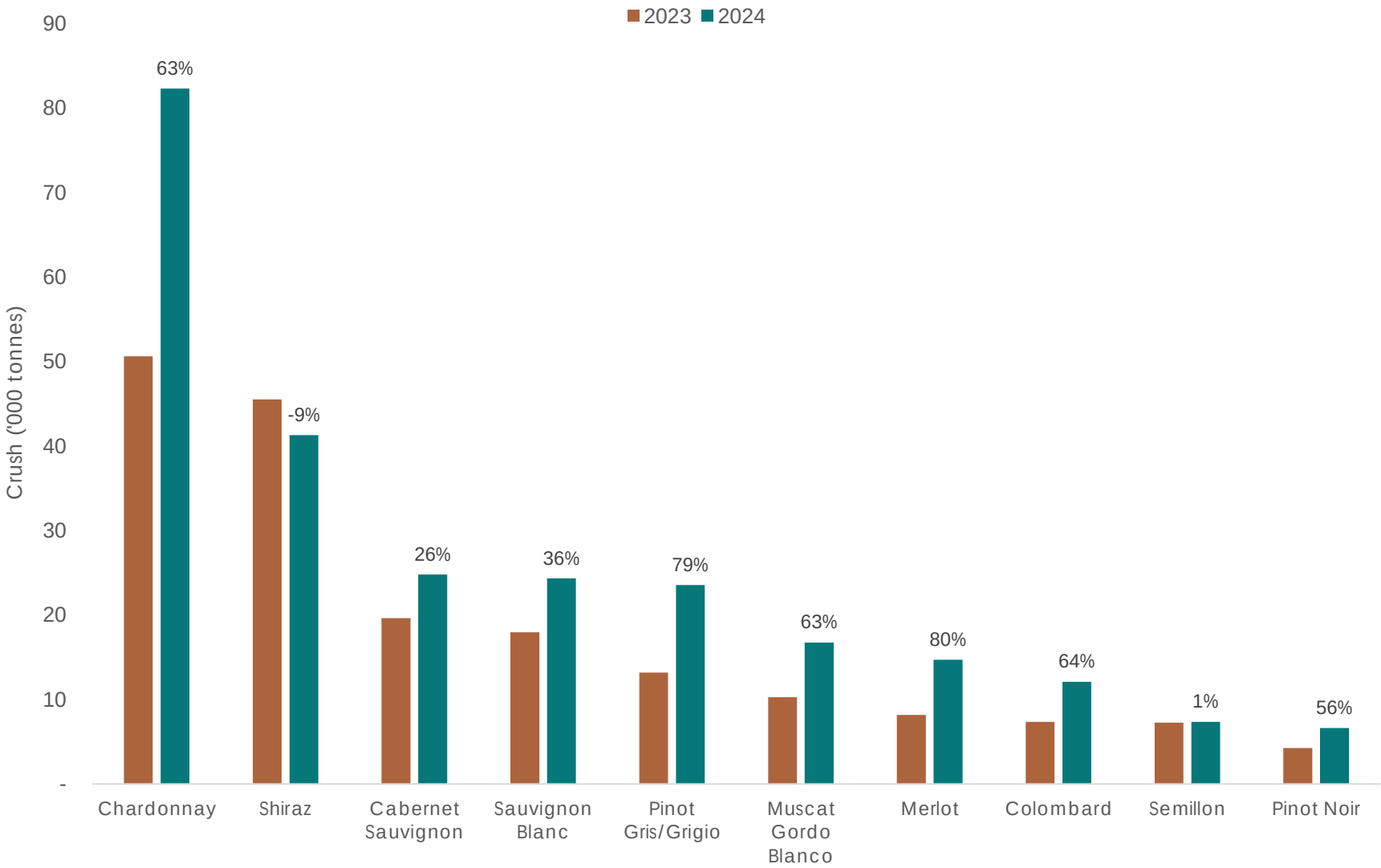
2024 Vintage Murray Darling - Swan Hill Vic

	Total Winery Grown Tonnes	Total Purchased Tonnes	Total Crushed Tonnes	Total value of Purchased Fruit	Total Value of Crush	Colour % of Total Value	Colour % of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
Red	28,679	35,372	64,051	13,513,424	24,344,654	38%	39%	55%	56%
White	19,882	79,392	99,273	31,635,589	39,737,833	62%	61%	80%	80%
Total crush	48,561	114,763	163,325	45,149,013	64,082,488	100%	100%	70%	70%

2024 Vintage Murray Darling - Swan Hill by state

	Total Winery Grown Tonnes	Total Purchased Tonnes	Total Crushed Tonnes	Total value of Purchased Fruit	Total Value of Crush	Average value	State % of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
NSW	69,067	49,946	119,013	19,971,702	46,949,538	400	42%	42%	43%
Vic	48,561	114,763	163,325	45,149,013	64,082,488	393	58%	70%	70%
Total crush	117,628	164,710	282,338	65,120,715	111,032,026	395	100%	58%	59%

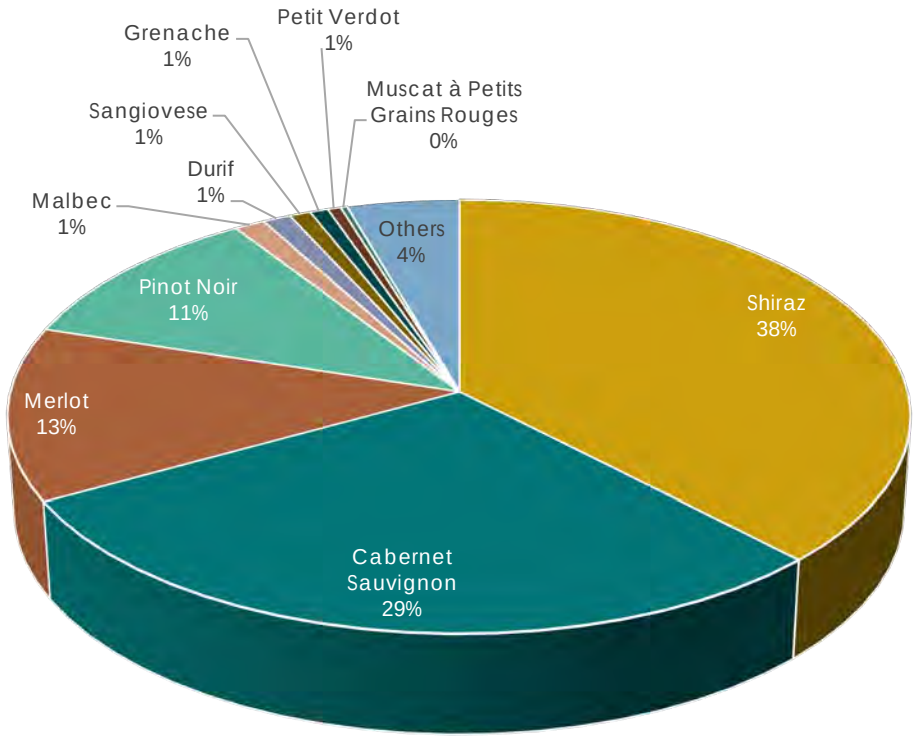
Vintage summary top 10 varieties - 2024 vs 2023



Total purchased tonnes 2024 – major red varieties

Reds (top 10 major varieties)	Purchased (tonnes)
Shiraz	18,803
Cabernet Sauvignon	14,498
Merlot	6,440
Pinot Noir	5,444
Malbec	610
Durif	556
Sangiovese	425
Grenache	359
Petit Verdot	263
Muscat à Petits Grains Rouges	130
Others	2,229
Total red	**49,756**

Other reds detail	Purchased (tonnes)
Lambrusco Maestri	1,565
Ruby Cabernet	127
Tempranillo	72
Montepulciano	21
Graciano	18
Nero d'Avola	5
Other varieties	422

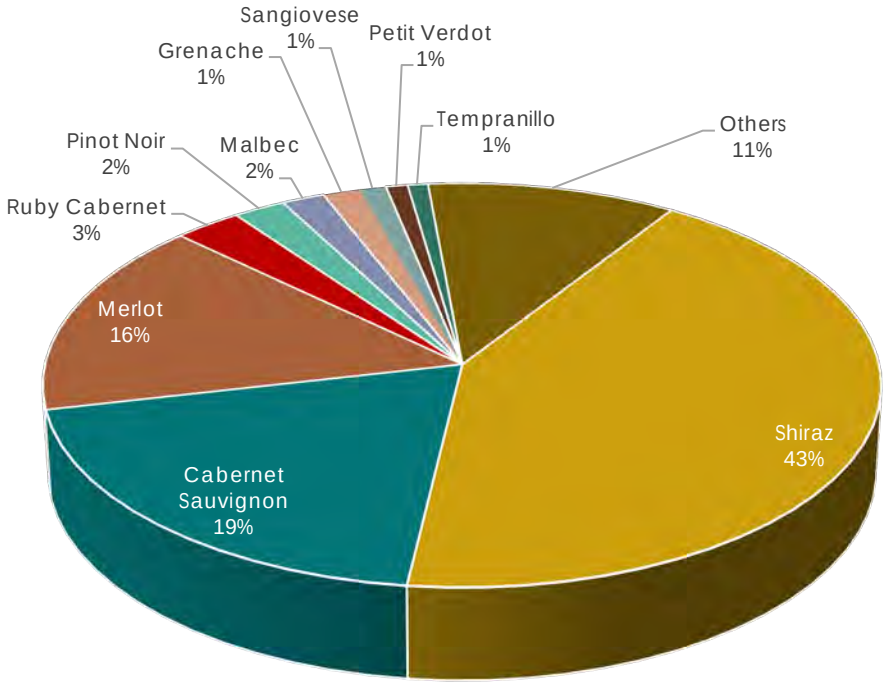


Note: other varieties reported by fewer than three different wineries are not identified

Total winery-grown tonnes 2024 – major red varieties

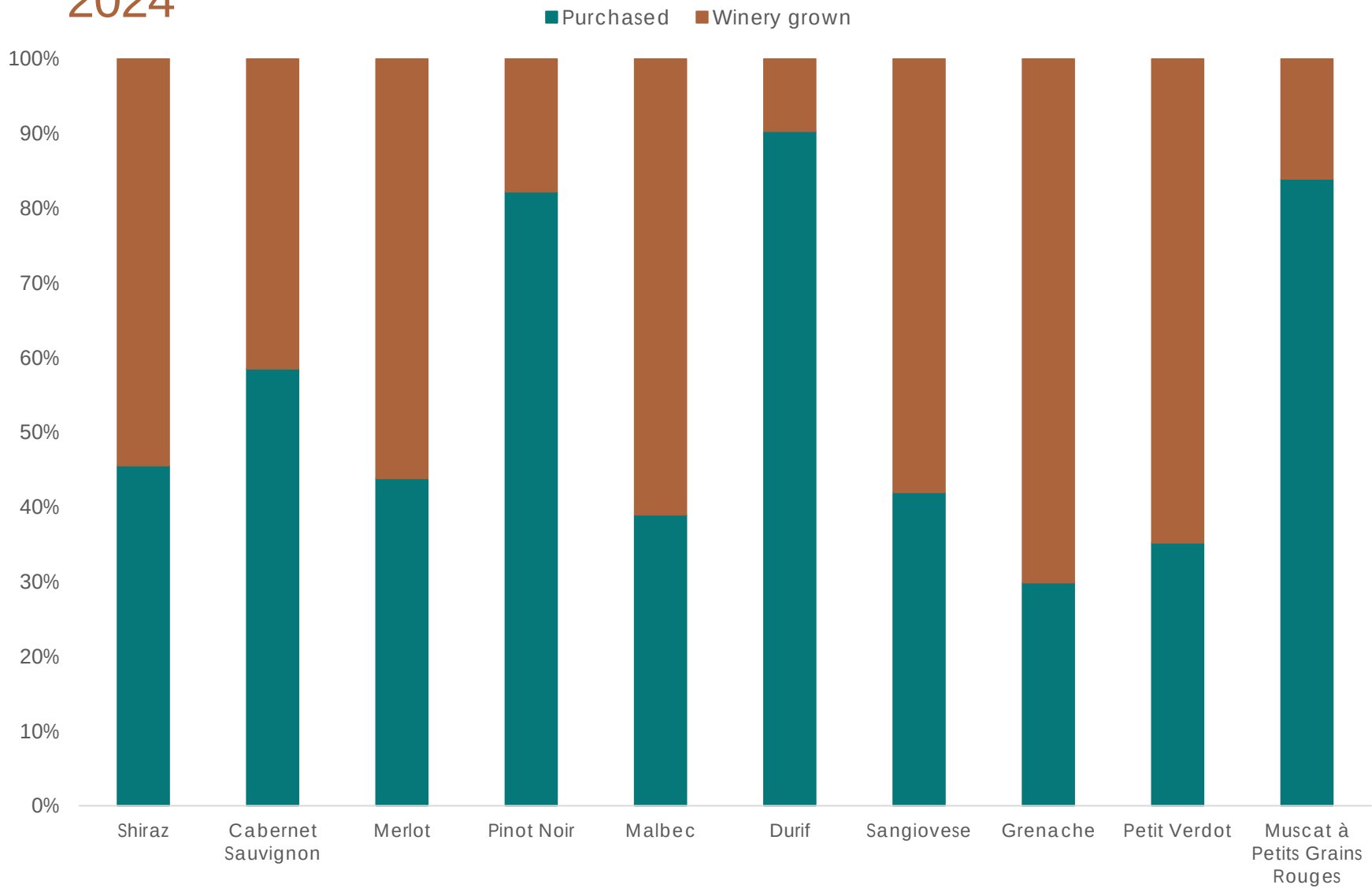
Reds (top 10 major varieties)	Winery grown (tonnes)
Shiraz	22,486
Cabernet Sauvignon	10,277
Merlot	8,253
Ruby Cabernet	1,520
Pinot Noir	1,177
Malbec	955
Grenache	841
Sangiovese	587
Petit Verdot	484
Tempranillo	453
Others	5,585
Total red	**52,617**

Other reds detail	Winery grown (tonnes)
Rubired	2,729
Montepulciano	191
Nero d'Avola	105
Graciano	103
Mataro/Mourvedre	83
Durif	60
Muscat à Petits Grains Rouges	25
Nebbiolo	21
Other varieties	2,269



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

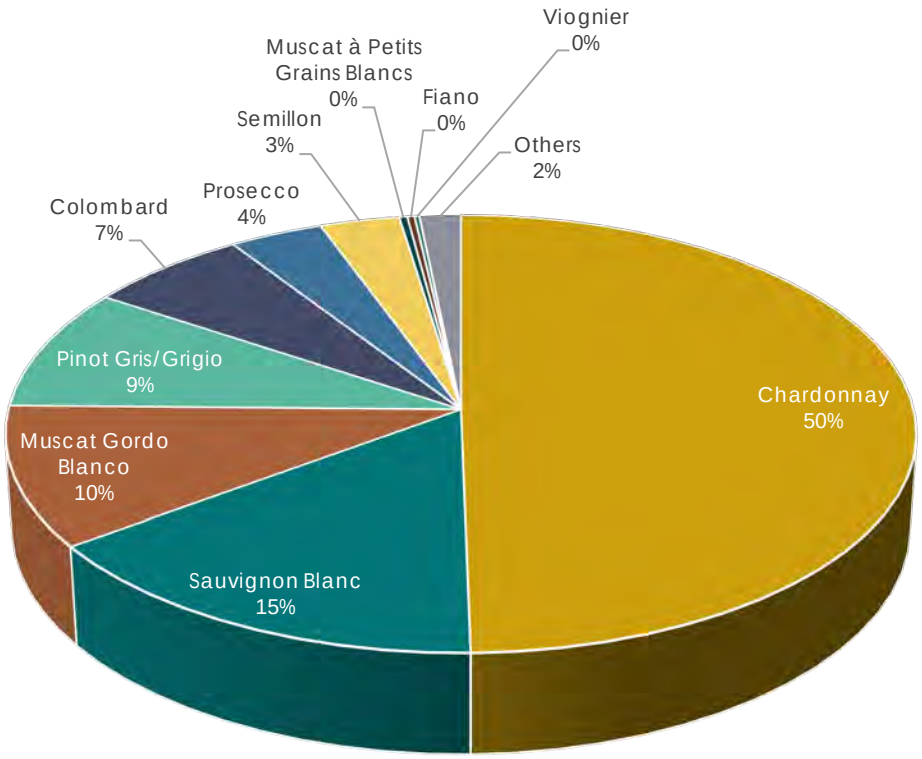
Share of purchased vs winery-grown for red varieties 2024



Total purchased tonnes 2024 – major white varieties

Whites (top 10 major varieties)	Purchased (tonnes)
Chardonnay	57,126
Sauvignon Blanc	17,478
Muscat Gordo Blanco	11,944
Pinot Gris/Grigio	10,365
Colombard	7,390
Prosecco	4,256
Semillon	3,614
Muscat à Petits Grains Blancs	361
Fiano	326
Viognier	223
Others	1,871
Total white	**114,954**

Other whites detail	Purchased (tonnes)
Moscato Giallo	1,129
Vermentino	213
Riesling	191
Gewürztraminer	117
Verdelho	70
Chenin blanc	60
Inzolia	16
Pecorino	8
Falanghina	8
Other varieties	61

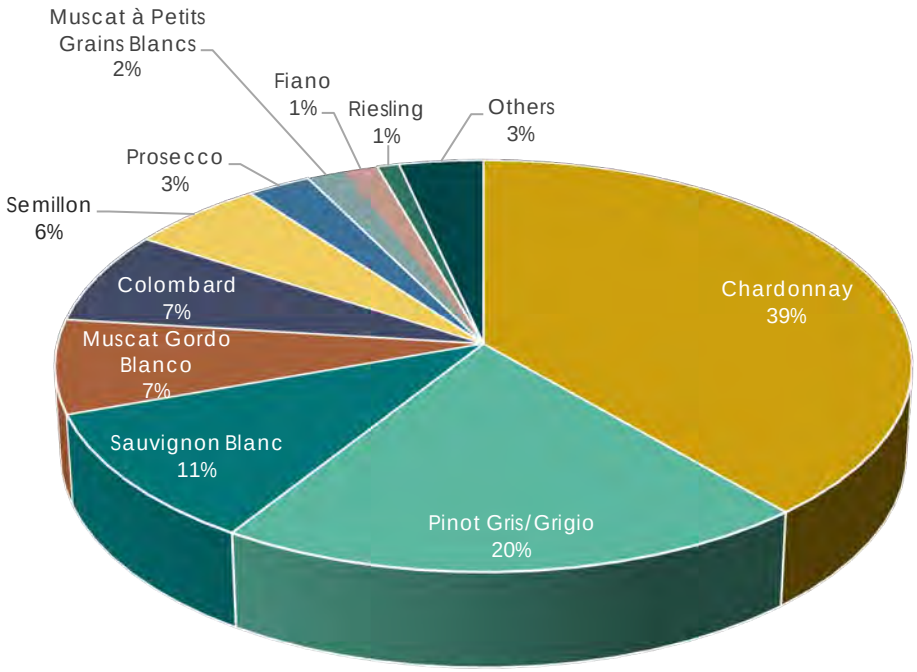


Note: other varieties reported by fewer than three different wineries are not identified

Total winery-grown tonnes 2024 – major white varieties

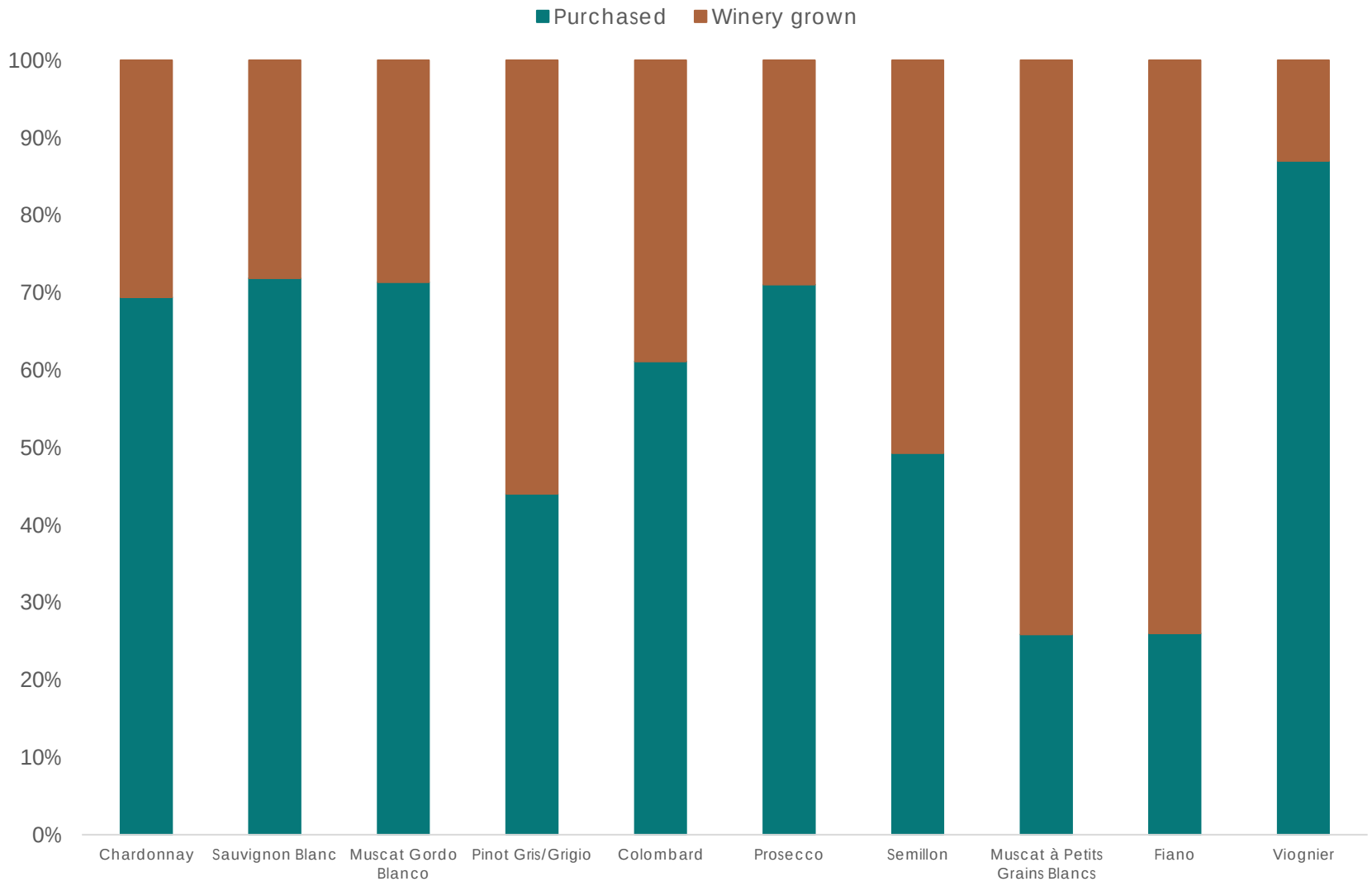
Whites (top 10 major varieties)	Winery grown (tonnes)
Chardonnay	25,180
Pinot Gris/Grigio	13,177
Sauvignon Blanc	6,850
Muscat Gordo Blanco	4,798
Colombard	4,699
Semillon	3,722
Prosecco	1,736
Muscat à Petits Grains Blancs	1,035
Fiano	926
Riesling	599
Others	2,289
Total white	**65,011**

Other whites detail	Winery grown (tonnes)
Verdelho	426
Vermentino	264
Canada Muscat	88
Viognier	33
Other varieties	1,478



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

Share of purchased vs winery-grown for white varieties 2024



SECTION 2

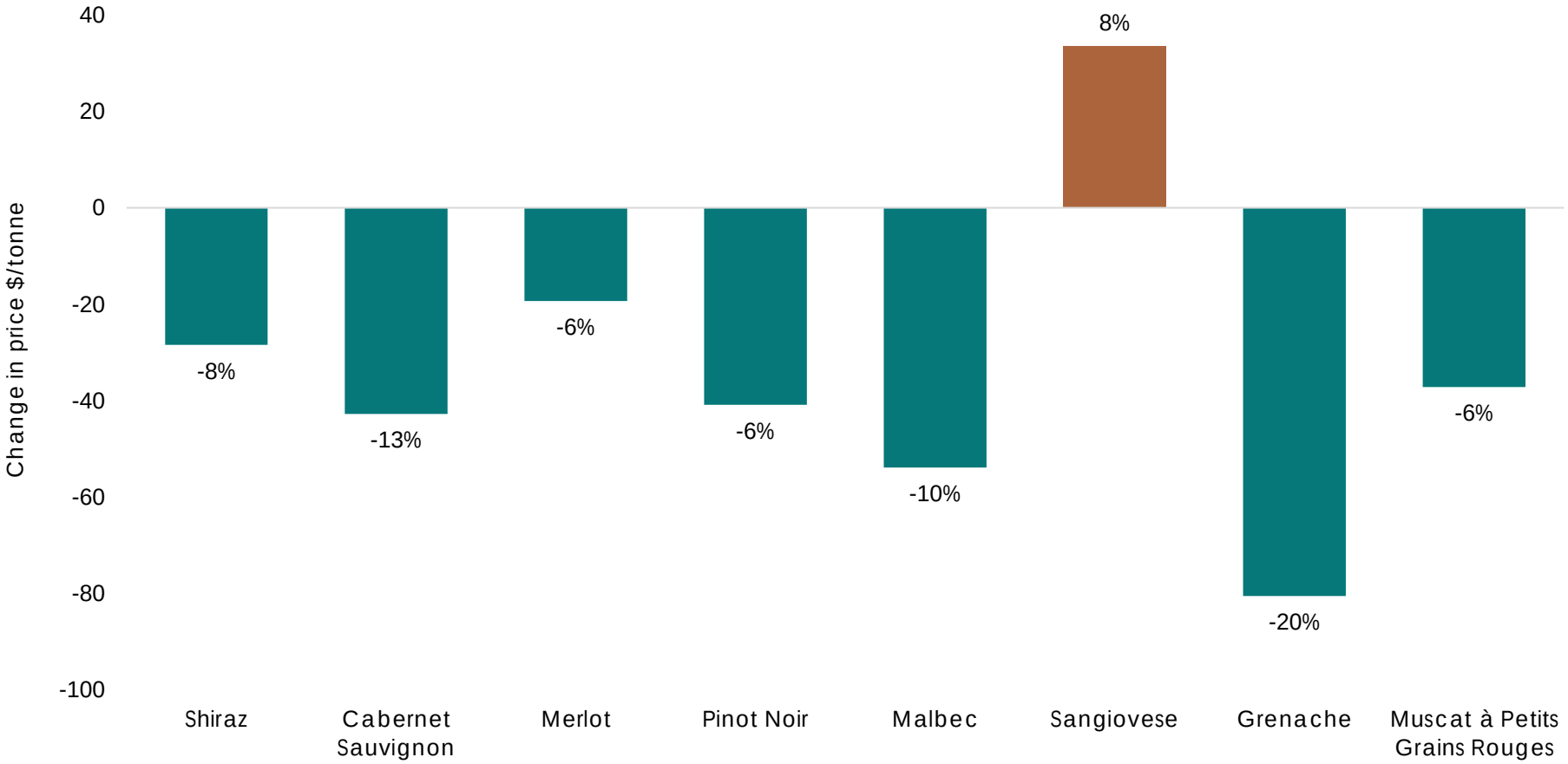
WINE GRAPE VALUE AND TONNAGE DATA 2024

Intake and price summary data by variety 2024 – red varieties

	Purchased Grape Summary			Winery	2024 Total			2023 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	14,498	$4,289,815	$296	10,277	24,775	$7,299,663	24%	$339	19,612
Durif	556	$215,262	$387	60	615	$234,599	1%		728
Graciano	18			103	120	$100,330	0%		7
Grenache	359	$116,058	$323	841	1,200	$388,080	1%	$404	895
Malbec	610	$312,882	$513	955	1,564	$837,038	2%	$567	1,790
Mataro/Mourvedre				83	83	$30,558	0%		
Merlot	6,440	$2,041,159	$317	8,253	14,693	$4,427,031	14%	$336	8,173
Montepulciano	21			191	212	$113,452	0%		162
Muscat à Petits Grains Rouges	130	$71,554	$552	25	154	$85,229	0%	$590	239
Nebbiolo				21	21	$4,360	0%		21
Nero d'Avola	5			105	109	$79,637	0%	$1,189	84
Petit Verdot	263			484	748	$171,120	1%		498
Pinot Noir	5,444	$3,672,335	$675	1,177	6,621	$4,411,900	6%	$715	4,239
Ruby Cabernet	127			1,520	1,647	$516,724	2%		452
Sangiovese	425	$183,984	$433	587	1,011	$438,169	1%	$400	970
Shiraz	18,803	$5,793,722	$308	22,486	41,289	$12,586,318	40%	$337	45,517
Tempranillo	72			453	524	$296,727	1%		309
Other red	1,987	$840,284	$423	4,998	6,985	$3,762,073	7%	$468	5,121
Red Total	**49,756**	**$17,745,272**	**$357**	**52,617**	**102,373**	**$35,783,007**	**100%**	**$374**	**88,815**

Note: value and average value are not displayed for varieties reported by fewer than three different wineries but are included in the calculation of the totals

Change in average price per tonne 2023 to 2024 – top 10 purchased red varieties



Note: average values are not displayed for varieties reported by fewer than three different wineries

Price dispersion 2024 – red varieties

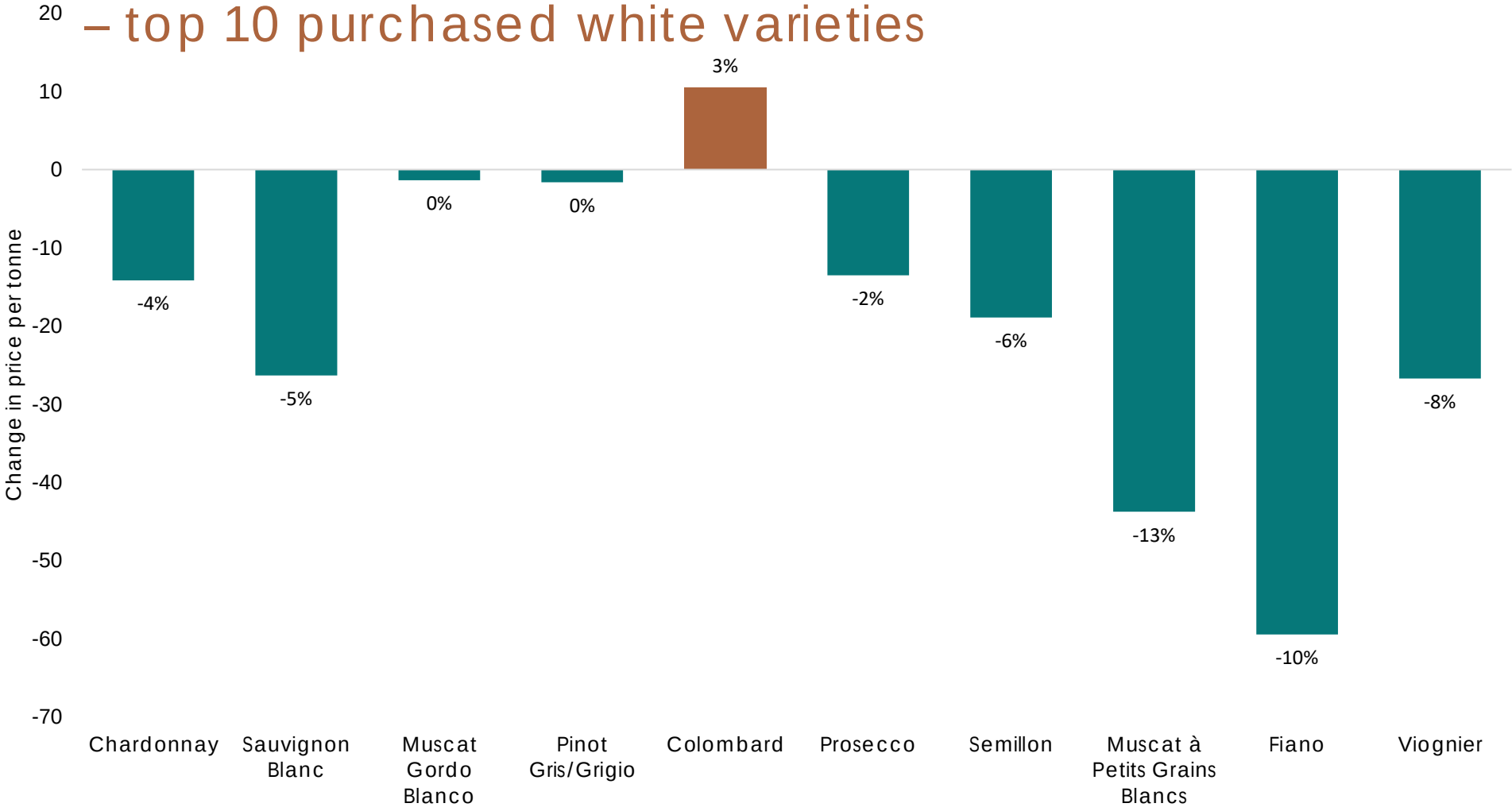
Varieties	Tonnes purchased in each price range						Total tonnes purchased
	<$300	$300-<$400	$400-<$500	$500-<$600	$600-<$700	$700+	
Red							
Cabernet Sauvignon	7,362	3,397	3,739	0	0	0	14,498
Durif	0	279	277	0	0	0	556
Graciano	0	0	0	0	0	18	18
Grenache	251	0	0	0	108	0	359
Malbec	0	63	206	316	24	0	610
Merlot	2,947	566	2,927	0	0	0	6,440
Montepulciano	0	0	0	0	0	21	21
Muscat à Petits Grains Rouges	0	42	0	0	35	53	130
Nero d'Avola	0	0	0	0	0	5	5
Petit Verdot	206	0	0	58	0	0	263
Pinot Noir	0	0	0	0	4,063	1,381	5,444
Ruby Cabernet	102	0	0	0	0	25	127
Sangiovese	95	153	0	0	148	29	425
Shiraz	9,421	3,694	4,413	447	828	0	18,803
Tempranillo	0	23	0	0	0	49	72
Other red	289	632	463	562	10	30	1,987
Red Total	**20,672**	**8,849**	**12,025**	**1,383**	**5,217**	**1,610**	**49,756**

Intake and price summary data by variety 2024 – white varieties and total

	Purchased Grape Summary			Winery	2024 Total			2023 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									
Chardonnay	57,126	$21,073,357	$369	25,180	82,306	$30,714,684	46%	383	50,624
Chenin blanc	60				60	$22,618	0%		46
Colombard	7,390	$2,350,359	$318	4,699	12,089	$3,879,019	7%	308	7,355
Fiano	326	$184,365	$566	926	1,252	$606,288	1%	626	490
Gewürztraminer	117				117	$44,331	0%		123
Muscat à Petits Grains Blancs	361	$110,024	$304	1,035	1,396	$442,186	1%	348	604
Muscat Gordo Blanco	11,944	$3,982,261	$333	4,798	16,741	$5,594,855	9%	335	10,263
Pinot Gris/Grigio	10,365	$5,501,651	$531	13,177	23,542	$12,406,865	13%	532	13,164
Prosecco	4,256	$2,757,797	$648	1,736	5,993	$3,838,538	3%	661	4,473
Riesling	191	$75,030	$394	599	790	$282,033	0%	389	236
Sauvignon Blanc	17,478	$9,505,860	$544	6,850	24,328	$13,252,505	14%	570	17,946
Semillon	3,614	$1,122,594	$311	3,722	7,336	$2,275,069	4%	330	7,247
Verdelho	70			426	496	$152,211	0%		429
Vermentino	213	$94,165	$442	264	477	$160,095	0%	455	299
Viognier	223	$73,011	$327	33	256	$86,231	0%	354	325
Other white	1,221	$456,452	$374	1,566	2,788	$1,491,492	2%	344	2,622
White Total	**114,954**	**$47,375,444**	**$412**	**65,011**	**179,965**	**$75,249,019**	**100%**	**439**	**116,245**
Grand Total	**164,710**	**$65,120,715**	**$395**	**117,628**	**282,338**	**$111,032,026**		**412**	**205,061**

Note: value and average value are not displayed for varieties reported by fewer than three different wineries but are included in the calculation of the totals

Change in average price per tonne 2023 to 2024 – top 10 purchased white varieties



Note: average values are not displayed for varieties reported by fewer than three different wineries

Price dispersion 2024 – white varieties and total

Varieties	Tonnes purchased in each price range						Total tonnes purchased
	<$300	$300-<$400	$400-<$500	$500-<$600	$600-<$700	$700+	
White							
Chardonnay	136	46,650	10,129	201	0	10	57,126
Chenin blanc	0	60	0	0	0	0	60
Colombard	2,581	4,250	559	0	0	0	7,390
Fiano	0	0	110	102	81	33	326
Gewürztraminer	0	117	0	0	0	0	117
Muscat à Petits Grains Blancs	193	168	0	0	0	0	361
Muscat Gordo Blanco	1,499	10,394	0	0	0	51	11,944
Pinot Gris/Grigio	0	0	622	8,417	1,288	38	10,365
Prosecco	0	0	27	944	2,428	857	4,256
Riesling	0	97	94	0	0	0	191
Sauvignon Blanc	106	0	6,615	5,825	4,302	631	17,478
Semillon	1,117	2,457	0	40	0	0	3,614
Verdelho	0	70	0	0	0	0	70
Vermentino	48	0	107	49	0	9	213
Viognier	0	223	0	0	0	0	223
Other white	228	936	0	0	23	34	1,221
White Total	**5,908**	**65,421**	**18,262**	**15,578**	**8,123**	**1,662**	**114,954**
Total purchased	**26,580**	**74,270**	**30,287**	**16,961**	**13,339**	**3,273**	**164,710**

SECTION 3

ABOUT THE SURVEY

Respondents

Thank you to the following wineries that reported crushing grapes from Murray Darling and Swan Hill regions in 2024.

Accolade Wines
Australian Vintage
Berton Vineyards
Brokenwood Wines
Brown Family Wine Group
Barfold Estate
Casella Family Brands
Chalmers Wines
Pfeiffer Wines
De Bortoli
Defialy
Duxton Vineyards
Oak Valley Estate
Four Sisters
Fourth Wave Wine
Andrew Peace Wines
Kingston Estate
Lark Hill
Latitude 32 Wines
Lowe Wine
McPherson Wines
Mino & Co (M+CO)
Oxley Estate Wines
Pernod Ricard Winemakers
Qualia Wine Services
Redbank Wines
Hill-Smith Family Estates
Tar & Roses
The Bull Ant Wine Company
Hanging Rock Winery
Callipari
Geppetto Wines
Treasury Wine Estates
Trentham Estate
The Wine Group
Weilong Wines
Whimwood Estate Wines
Zilzie Wines

Explanations and definitions

AUSTRALIAN NATIONAL VINTAGE SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian National Vintage Survey 2024. The Murray Darling & Swan Hill Summary Report has been prepared by Wine Australia on behalf of Murray Valley Winegrowers Inc.

Vineyard map

The vineyard boundaries shown in the map were derived from the National Vineyard Scan 2019, conducted on behalf of Wine Australia by Consilium Technology Inc.

Photo credits

Image credits: Murray Valley Winegrowers and Wine Australia

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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Explanations and definitions - continued

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with Geographical Indication (GI) boundaries.

Total crush

The total crushed is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in Victoria or interstate. All wineries in Australia are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 88 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("winery grown") and from independent vineyards ("purchased").

Varieties are classified into 'major' varieties and 'other red/white' varieties, according to their national importance. It is possible that an 'other' red or white variety could have a larger crush in MD-SH regions than one of the major varieties, but will not be included in the top 10 list or separated in the intake summary tables.

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). 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 2024).

The calculated average purchase value per tonne is the average amount paid per tonne of fruit across all wineries.

Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements.

Average and total purchase values are not reported where there are fewer than three purchasers of a variety in a particular region. However, the values are included in the calculation of totals for each region.

Important note on average purchase value

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts.

Price dispersion data (shaded columns in Intake Summary tables)

All purchases for each variety are grouped into price segments according to the price paid for that batch of fruit. The sum of tonnes in all the price segments may not match the total tonnes purchased where there are tonnes reported without an associated price.

Estimated 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.