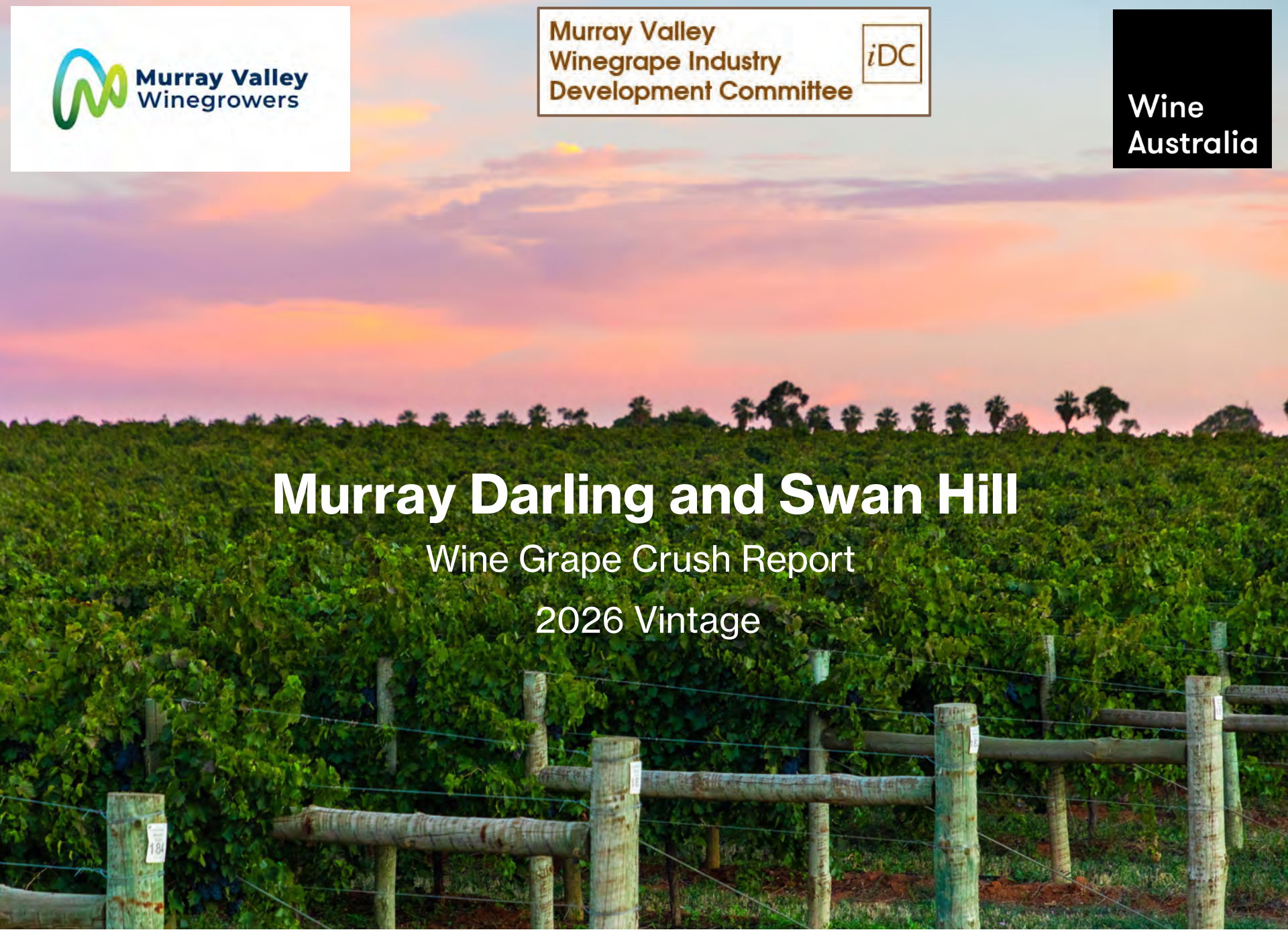
Murray Valley Winegrowers

Murray Valley Winegrape Industry Development Committee

iDC

Wine Australia



Murray Darling and Swan Hill

Wine Grape Crush Report

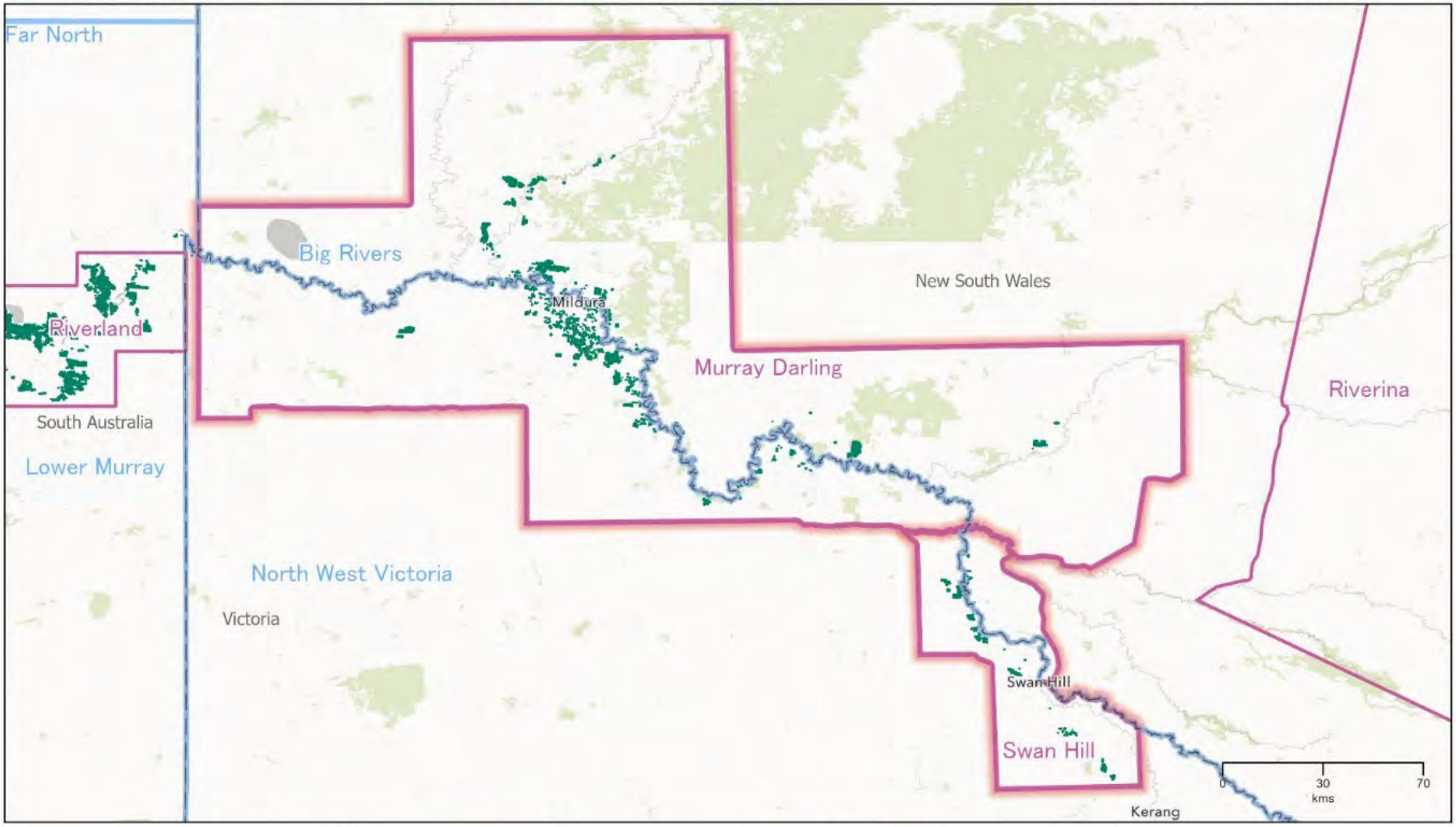
2026 Vintage

Table of Contents

- Murray Darling and Swan Hill GI wine regions 3
- **Section 1: Summary data and yearly trends** **4**
- Season report – vintage 2026 5
- Vintage statistics 2026 6
- Crush from the Murray Darling and Swan Hill regions 2012-2026 7
- Historical trends in production – winery-grown vs purchased fruit 2012-2026 8
- Vintage summary 2026 vs 2025 9
- Vintage summary 2026 by component states within Murray Darling and Swan Hill 10
- Vintage summary top 10 varieties 2026 vs 2025 11
- Total purchased tonnes 2026 – major red varieties 12
- Total winery-grown tonnes 2026 – major red varieties 13
- Share of purchased vs winery-grown tonnes 2026 – major red varieties 14
- Total purchased tonnes 2026 – major white varieties 15
- Total winery-grown tonnes 2026 – major white varieties 16
- Share of purchased vs winery-grown tonnes 2026 – major white varieties 17
- **Section 2: Wine grape value and tonnage data 2026** **18**
- Intake and price summary data by variety 2026 – red varieties 19
- Change in average price per tonne 2025 to 2026 – top 10 purchased red varieties 20
- Price dispersion 2026 – red varieties 21
- Intake and price summary data by variety 2026 – white varieties 22
- Change in average price per tonne 2025 to 2026 – top 10 purchased white varieties 23
- Price dispersion 2026 – white varieties and total 24
- **Section 3: About the survey** **25**
- List of wineries that reported crushing grapes from Murray Darling and Swan Hill in 2026 26
- Explanations and definitions 27

MURRAY DARLING-SWAN HILL

Victoria-New South Wales



Wine Australia for Australian Wine

Copyright in this map is owned by Wine Australia July 2020

Vineyard boundaries created and supplied by GAIA for the National Vineyard Scan 2019. Visit gaia.ag for more information. This information is reproduced with the permission of GAIA Innovations

Geographic Indications (GI) boundaries Wine Australia (excluding South Australia where they are provided with permission by Vine Health Australia). Further information can be found at www.wineaustralia.com/labelling/register-of-protected-gi-and-other-terms/geographical-indications

Base map sources Esri, HERE, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community © Commonwealth of Australia (Geoscience Australia) 2016.

You may store, display, print and reproduce this material only for non-commercial use or use within your organisation so long as you give appropriate acknowledgement to the copyright owner. The data must not be shared with commercial third parties without written consent from the Wine Australia. More information can be found at www.wineaustralia.com

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 2026

The 2026 vintage in the Murray Valley wine region will be remembered as one of the most challenging and compressed growing seasons in recent years, shaped by extreme heat, prolonged dry conditions, and significant late-season rainfall events that severely impacted yield and quality outcomes across many vineyards.

The growing season commenced with generally favourable winter and early spring conditions, allowing for good vine establishment and even budburst across most varieties. Spring rainfall was moderate and sufficient to support early canopy growth, while relatively low disease pressure through November and December provided growers with hope heading into the critical summer period.

However, conditions changed dramatically during January and February 2026 as the region experienced prolonged heatwave conditions and exceptionally high temperatures across north-west Victoria and southern New South Wales. Parts of the broader Murray and Darling regions recorded temperatures approaching 50°C during late January, placing substantial stress on vines.

The extended hot and dry conditions put pressure on many vineyards and significantly increased irrigation demands. Water stress became evident in lighter soil profiles, whilst some growers made the commercial decision to stop watering due to high water costs, the uncertainty of selling their crop and/or prioritising more financially viable varieties over others. Many growers reported reduced bunch weights and smaller berry size, particularly in Shiraz, Chardonnay, and Cabernet Sauvignon blocks. Yield expectations progressively declined throughout February as heat stress impacted fruit.

Following the intense summer heat, the region then experienced unprecedented rainfall events from late February into early March. A tropical low delivered widespread heavy rain across the Murray Valley, with many vineyards receiving between 100mm and 200mm over several days. Some locations near Mildura, Swan Hill and surrounding districts experienced record daily rainfall totals and localised flooding.

The timing of the rain events proved particularly damaging as the crop was approaching harvest for much of the fruit, particularly Reds and later-season White varieties. Rapid moisture uptake caused berry splitting and swelling in susceptible varieties, while warm humid conditions significantly increased the risk of botrytis, sour rot, and other fungal diseases. Access to vineyards became difficult in many areas due to boggy conditions, delaying harvesting operations and increasing pressure on growers and wineries already managing compressed intake schedules.

Production across the Murray Valley region was substantially below long-term averages, with many growers reporting yield reductions of 20–40 per cent, and some vineyards suffering even greater losses where rain and disease pressure were most severe. Despite the difficult season, fruit quality from vineyards harvested before the major rain events was generally strong, showing good colour, flavour concentration, and natural acidity.

Overall, vintage 2026 highlighted both the spirit and adaptability of Murray Valley winegrowers. While production volumes were significantly reduced and financial pressures remain acute, the vintage has produced some parcels of intensely flavoured wines that are showing strong varietal character and intensity - particularly Chardonnay, Pinot Grigio, Sauvignon Blanc and Pinot Noir.

The crop for the Murray Darling and Swan Hill regions is forecast to be around 270-280,000* tonnes, well below the long-term average of 350,000t.

Murray Valley Winegrowers – June 2026

* The annual crush report from Wine Australia for the region may under-report this figure given that not all wineries participate due to the voluntary nature of participation.

Vintage statistics 2026

The total wine grape harvest reported from the Murray Darling and Swan Hill (MD-SH) regions in 2026 was 237,316 tonnes, a decrease of 28 per cent compared with 2025 and 23 per cent below the 5-year average of 309,129 tonnes. It was the second-smallest reported crush for at least 20 years.

Nationally, the 2026 vintage was 1.27 million tonnes, 19 per cent lower than the 2025 vintage of 1.57 million tonnes and the smallest in over 25 years (since 2000).

Murray Darling and Swan Hill together accounted for 22 per cent of the national reported crush; 28 per cent of the white crush and 14 per cent of the red crush.

Purchased grapes accounted for 65 per cent of the crush from MD-SH in 2026, 1 percentage point lower than in 2025. The crush of winery-owned fruit in MD-SH decreased by 26 per cent compared with the 2025 crush, while the crush of grapes purchased from independent growers decreased by 29 per cent.

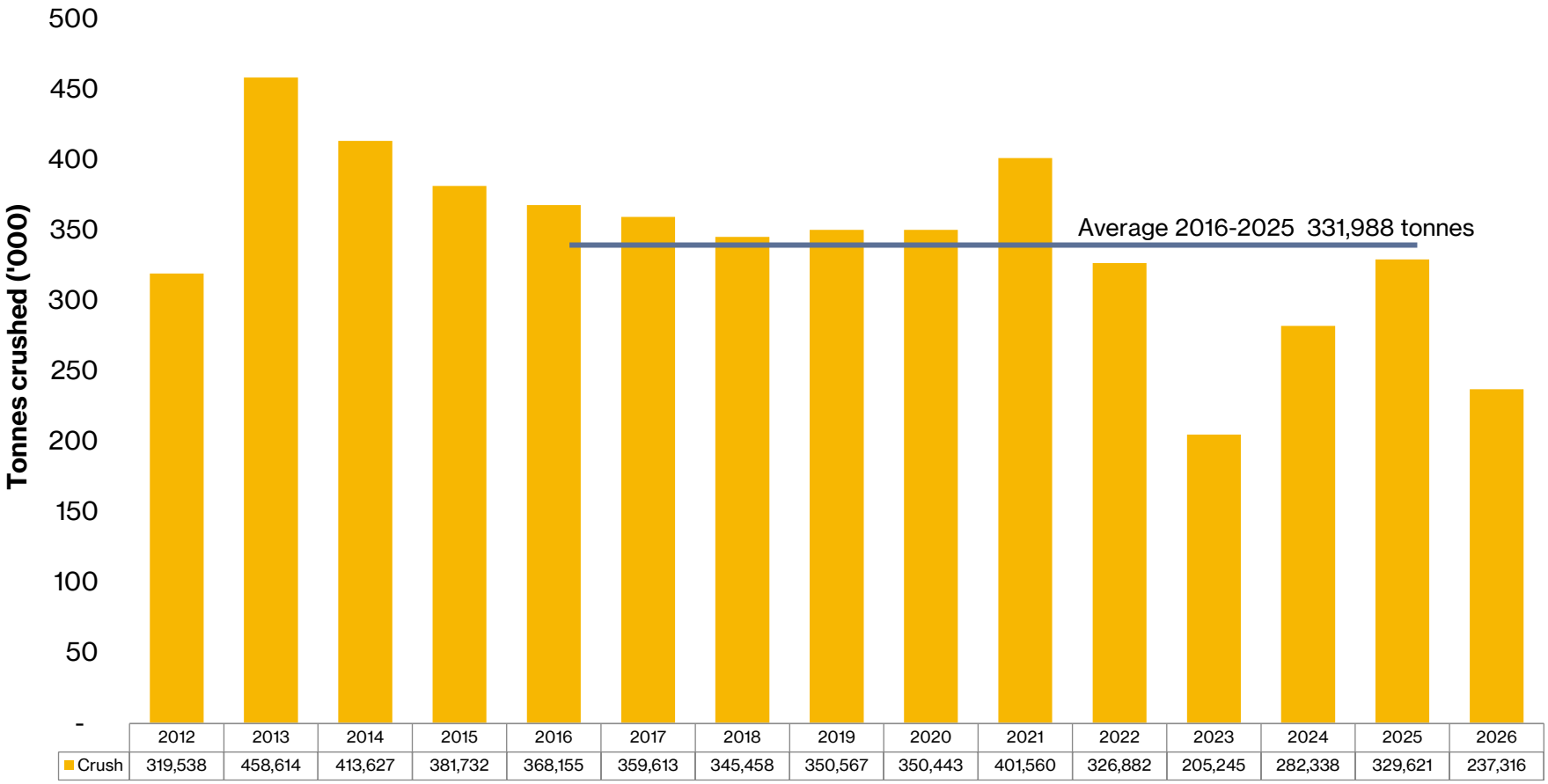
The crush of red grapes was down by 41 per cent overall, while the white crush was down by 20 per cent, causing the white share of the total crush to increase from 62 per cent in 2025 to 69 per cent. This is significantly higher than the average share of whites nationally, which was 53 per cent in 2026.

Chardonnay, the largest variety with a crush of 65,479 tonnes, had a decrease of 18 per cent year-on-year. All the top 10 varieties declined in crush. The largest decreases were for Cabernet Sauvignon (down 49 per cent) and Shiraz (down 43 per cent). This meant that Sauvignon Blanc overtook Shiraz to be the second largest variety, despite declining by 18 per cent. Pinot Gris/Grigio also overtook Cabernet Sauvignon as the fourth largest variety. Colombard dropped two places to 10th below Prosecco and Pinot Noir.

The overall average purchase value for the Murray Darling and Swan Hill regions declined by 9 per cent from $397 to $359 per tonne. White varieties had the strongest rate of decline, down 14 per cent in average value, while red varieties declined by 4 per cent. Of the top 10 varieties, the largest decrease in average value was in Malbec (down by 36 per cent). The largest decrease in average value for white varieties was Pinot Gris/Grigio (down 16 per cent). All other top varieties declined in average value, except for Vermentino which was stable at $452 per tonne. The average value for whites was 25 per cent higher than for reds.

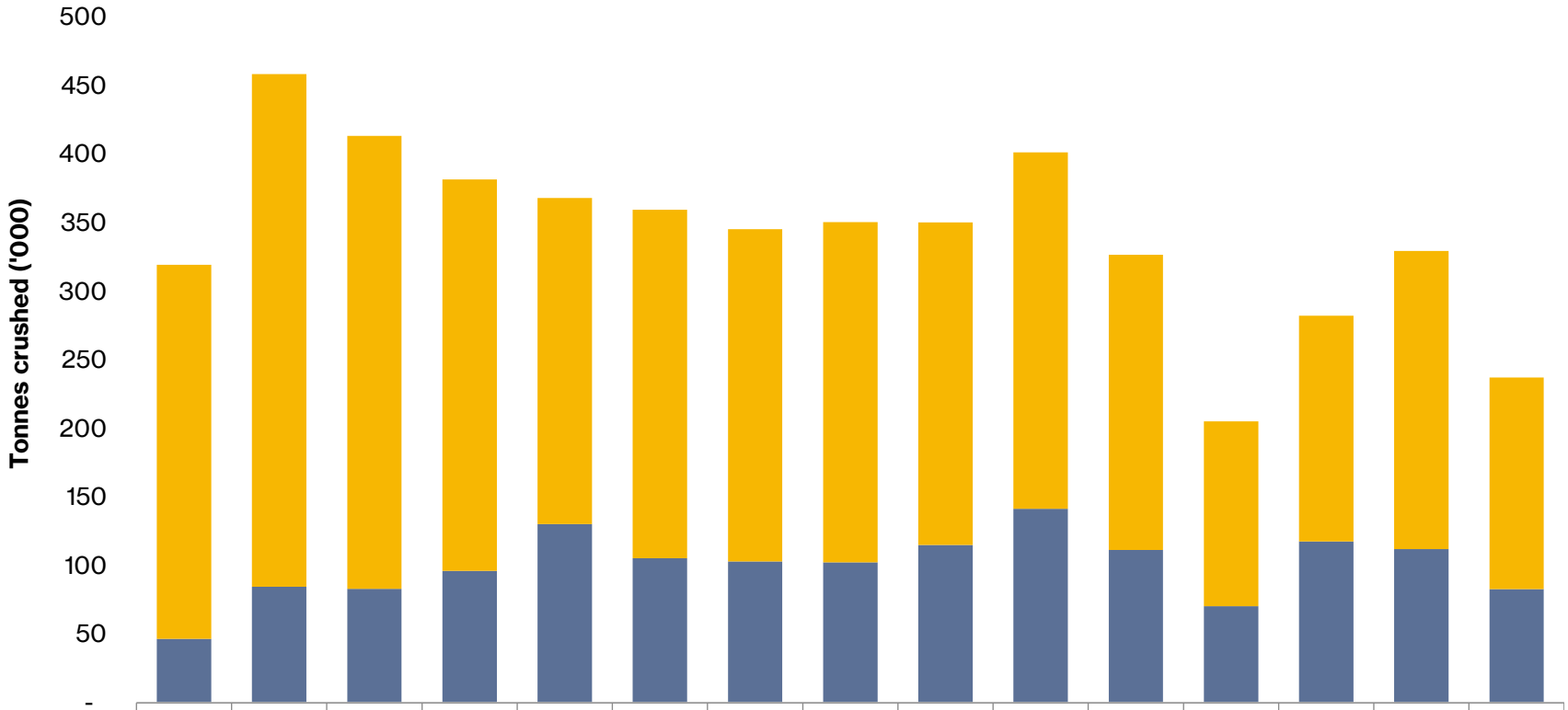
The value of the crush from Murray Darling and Swan Hill declined by $45.1 million (34 per cent) from $134 million in 2025 to $88.8 million in 2026. This was driven not only by decreased tonnage from reds and whites but also declines in average value across varieties. The value of purchased grapes decreased by 36 per cent ($31 million) from $86.4 million to $55.5 million.

Crush from the Murray Darling and Swan Hill regions 2012-2026



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Crush	319,538	458,614	413,627	381,732	368,155	359,613	345,458	350,567	350,443	401,560	326,882	205,245	282,338	329,621	237,316

Historical trends in production – winery grown vs purchased fruit 2012-2026



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Purchased	272,781	373,900	330,387	285,402	237,714	254,160	242,276	248,144	235,221	260,065	215,423	134,769	164,710	217,490	154,361
Winery Grown	46,757	84,714	83,240	96,330	130,441	105,454	103,183	102,424	115,221	141,495	111,459	70,476	117,628	112,132	82,955

Vintage summary 2026 vs 2025

2026 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	25,838	48,122	73,960	14,886,829	24,642,067	28%	31%	65%	60%
White	57,117	106,239	163,356	40,589,375	64,163,615	72%	69%	65%	63%
Total crush	82,955	154,361	237,316	55,476,204	88,805,682	100%	100%	65%	62%

2025 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	43,868	82,147	126,015	26,506,193	41,681,348	31%	38%	65%	64%
White	68,264	135,342	203,606	59,908,478	92,203,035	69%	62%	65%	65%
Total crush	112,132	217,490	329,621	86,414,671	133,884,384	100%	100%	66%	65%

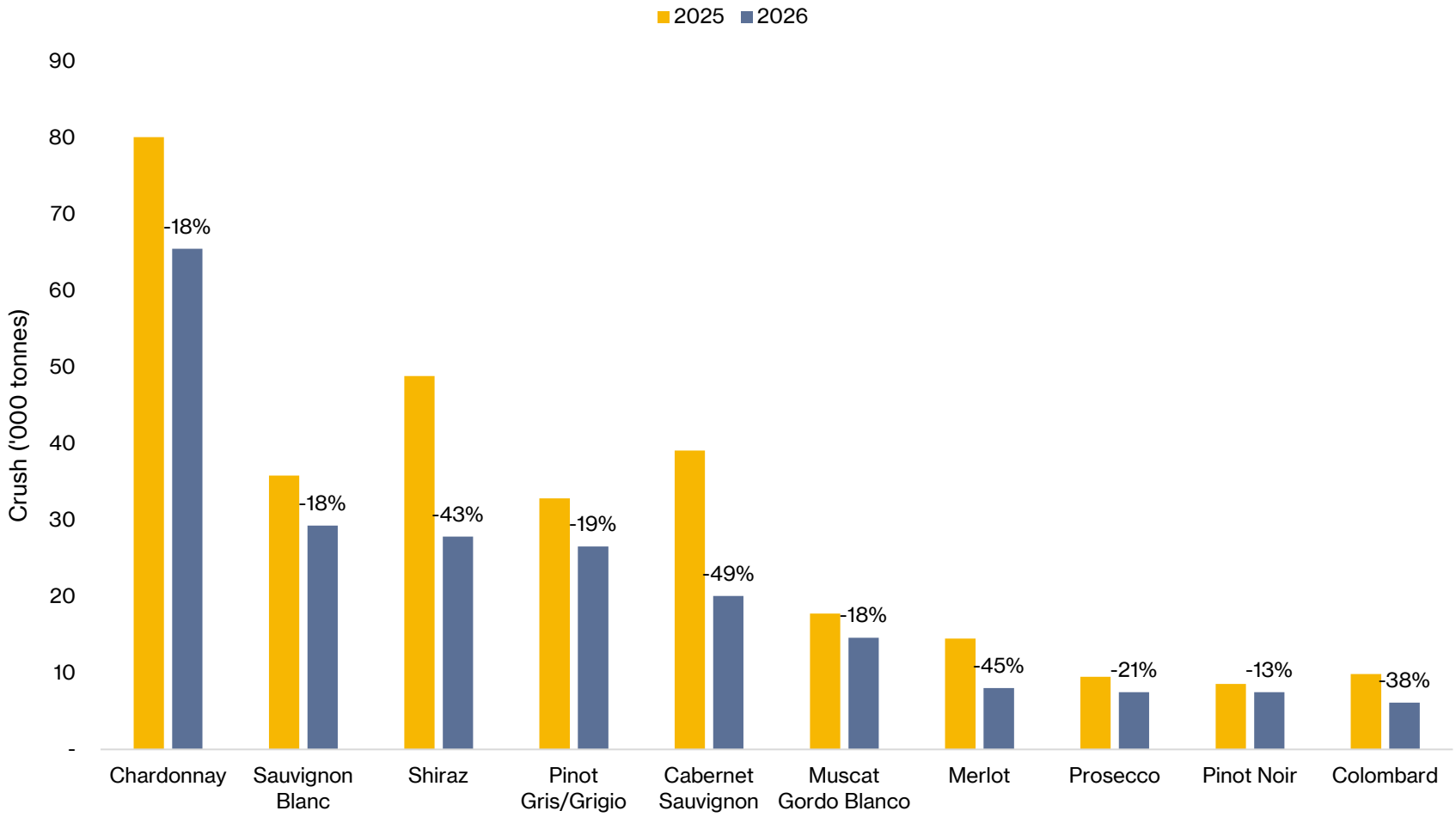
Vintage summary 2026 by component states within the Murray Darling and Swan Hill GI regions

2026 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 Percentage of Total Value	Colour Percentage of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
Red	9,402	17,767	27,169	5,579,008	9,313,838	21%	24%	65%	60%
White	44,591	41,181	85,773	17,478,926	35,844,730	79%	76%	48%	49%
Total crush	53,993	58,948	112,942	23,057,934	45,158,568	100%	100%	52%	51%

2026 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 Percentage of Total Value	Colour Percentage of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
Red	16,436	30,355	46,791	9,307,821	15,328,228	35%	38%	65%	61%
White	12,526	65,058	77,584	23,110,449	28,318,885	65%	62%	84%	82%
Total crush	28,962	95,413	124,375	32,418,269	43,647,114	100%	100%	77%	74%

2026 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 Percentage of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
NSW	53,993	58,948	112,942	23,057,934	45,158,568	391	48%	52%	51%
Vic	28,962	95,413	124,375	32,418,269	43,647,114	340	52%	77%	74%
Total crush	82,955	154,361	237,316	55,476,204	88,805,682	359	100%	65%	62%

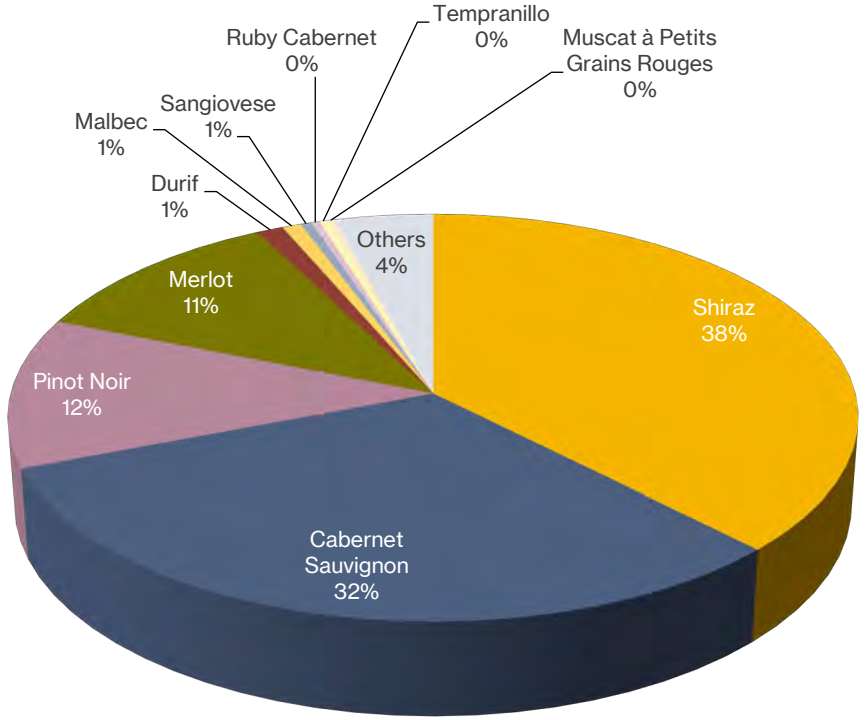
Vintage summary top 10 varieties – 2026 vs 2025



Total purchased tonnes 2026 – major red varieties

Reds (top 10 major varieties)	Purchased (tonnes)
Shiraz	18,085
Cabernet Sauvignon	15,193
Pinot Noir	5,749
Merlot	5,441
Durif	537
Malbec	391
Sangiovese	219
Ruby Cabernet	172
Tempranillo	161
Muscat à Petits Grains Rouges	158
Others	2,016
Total red	**48,122**

Other reds detail	Purchased (tonnes)
Lambrusco Maestri	1,468
Grenache	132
Petit Verdot	74
Mataro/Mourvedre	50
Montepulciano	23
Graciano	15
Nero d'Avola	7
Other varieties	248

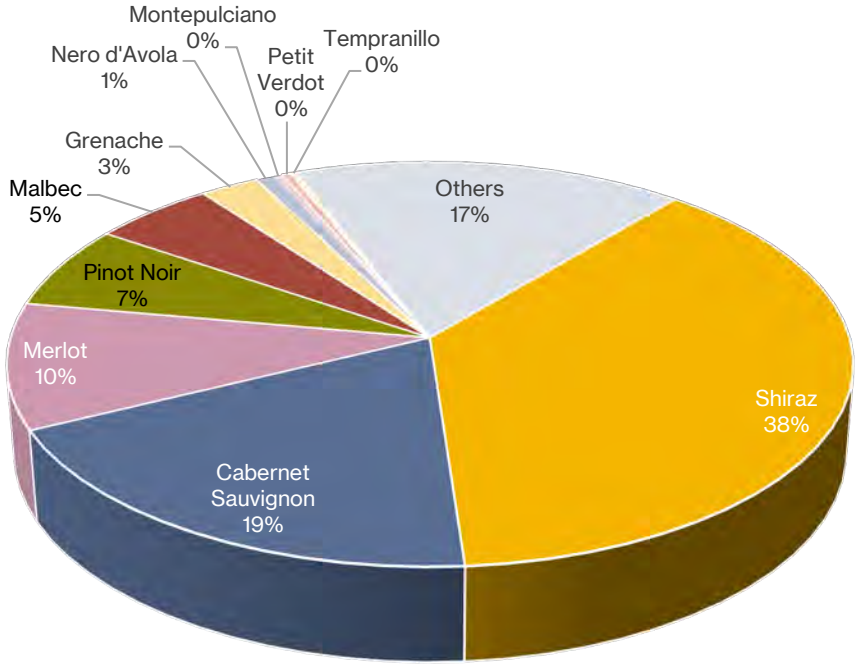


Note: other varieties reported by fewer than three different wineries are not identified

Total winery-grown tonnes 2026 – major red varieties

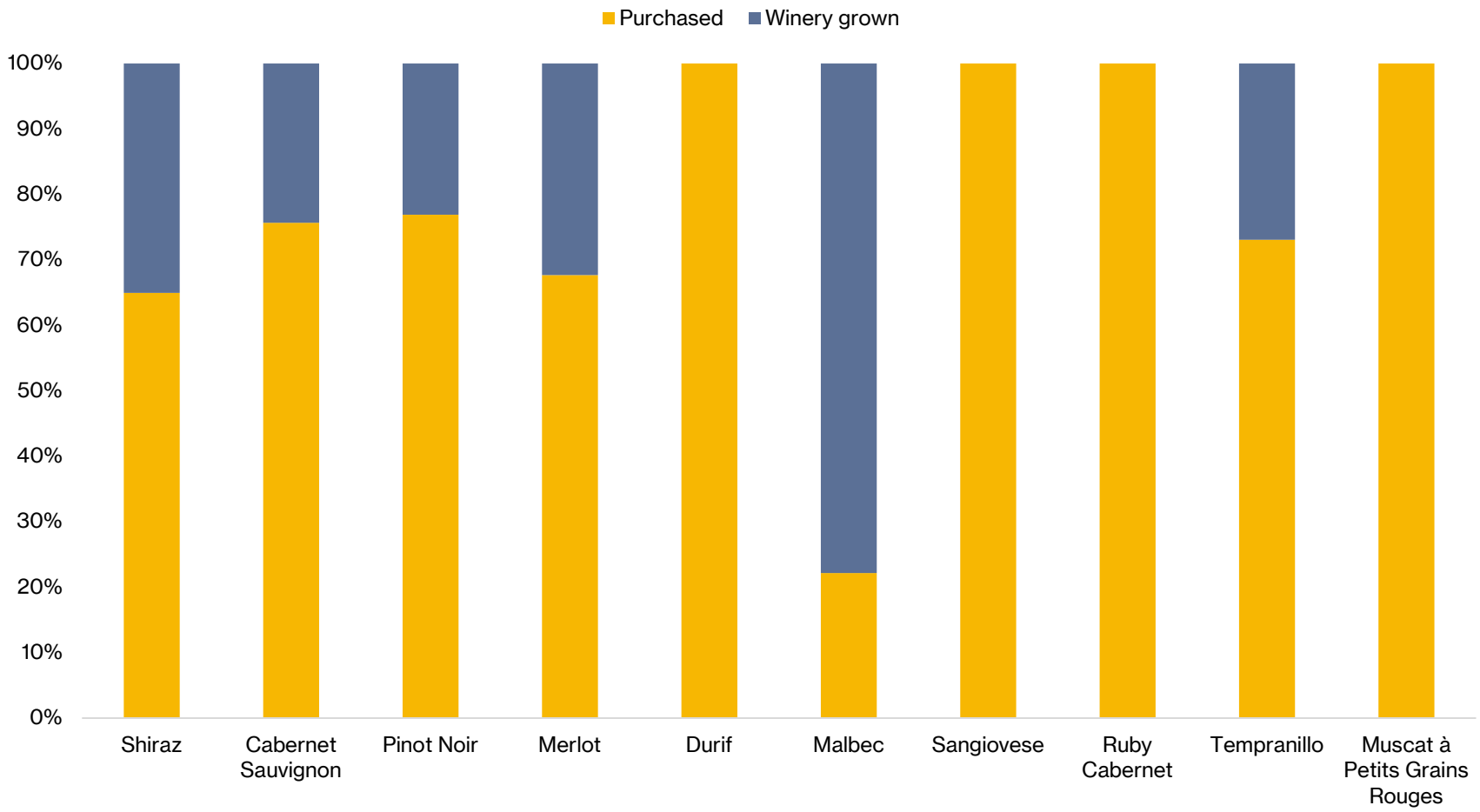
Reds (top 10 major varieties)	Winery grown (tonnes)
Shiraz	9,747
Cabernet Sauvignon	4,887
Merlot	2,599
Pinot Noir	1,726
Malbec	1,375
Grenache	664
Nero d'Avola	197
Montepulciano	105
Petit Verdot	99
Tempranillo	59
Others	4,380
Total red	**25,838**

Other reds detail	Winery grown (tonnes)
Rubired	2,296
Nebbiolo	22
Other varieties	2,061



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

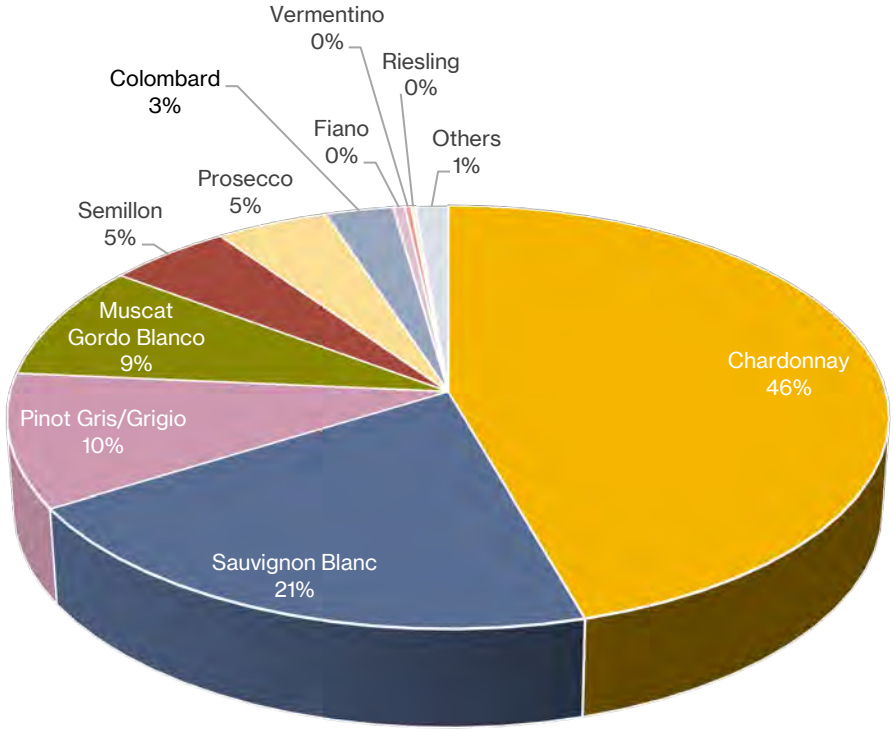
Share of purchased vs winery-grown tonnes 2026 – major red varieties



Total purchased tonnes 2026 – major white varieties

Whites (top 10 major varieties)	Purchased (tonnes)
Chardonnay	48,391
Sauvignon Blanc	21,930
Pinot Gris/Grigio	10,863
Muscat Gordo Blanco	9,329
Semillon	5,441
Prosecco	4,921
Colombard	2,964
Fiano	516
Vermentino	262
Riesling	195
Others	1,427
Total white	**106,239**

Other whites detail	Purchased (tonnes)
Viognier	192
Muscat à Petits Grains Blancs	113
Gewürztraminer	73
Chenin blanc	71
Other varieties	978

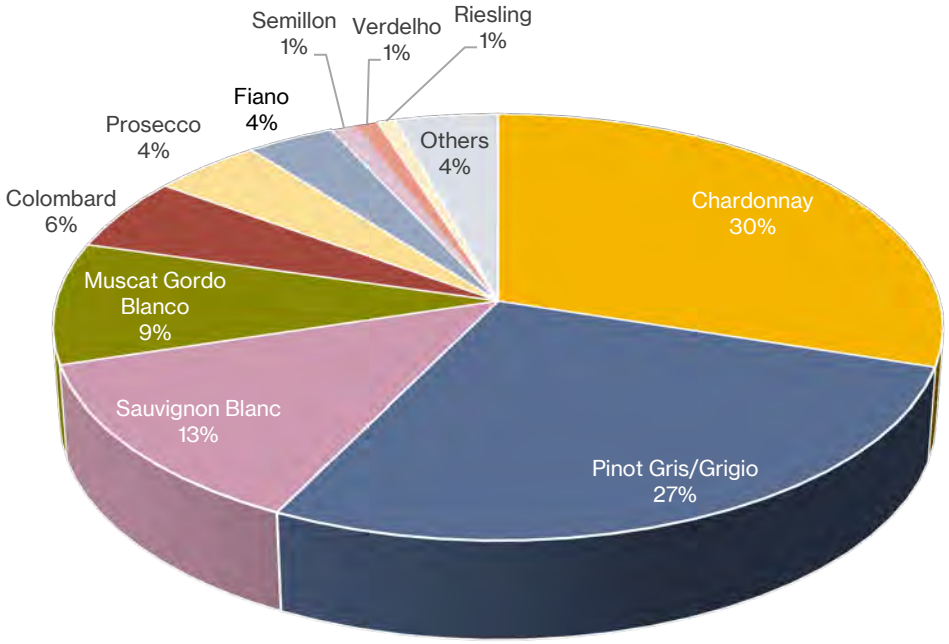


Note: other varieties reported by fewer than three different wineries are not identified

Total winery-grown tonnes 2026 – major white varieties

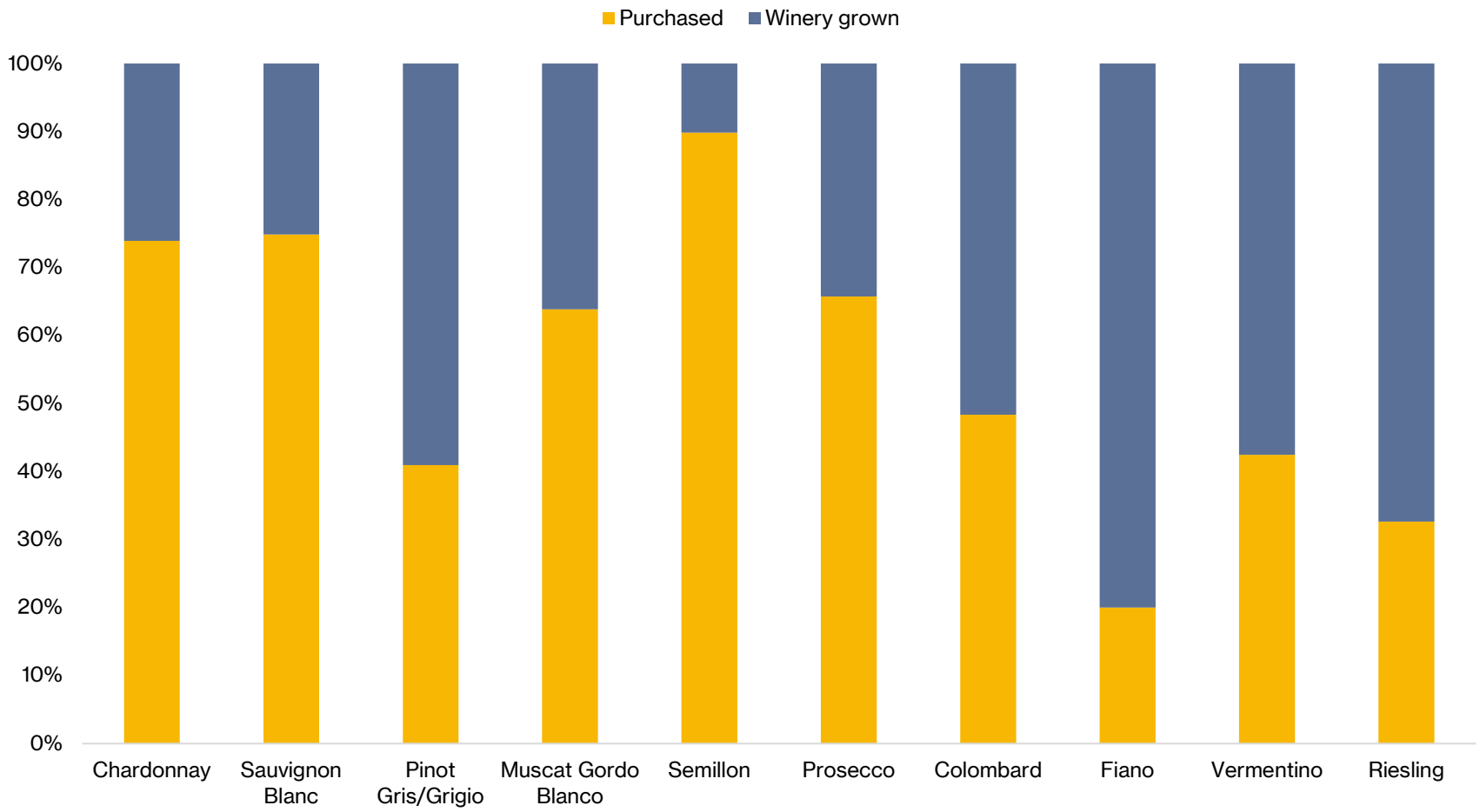
Whites (top 10 major varieties)	Winery grown (tonnes)
Chardonnay	17,087
Pinot Gris/Grigio	15,674
Sauvignon Blanc	7,359
Muscat Gordo Blanco	5,275
Colombard	3,165
Prosecco	2,562
Fiano	2,059
Semillon	614
Verdelho	508
Riesling	402
Others	2,412
Total white	**57,117**

Other whites detail	Winery grown (tonnes)
Vermentino	355
Muscat à Petits Grains Blancs	98
Viognier	37
Other varieties	1,923



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

Share of purchased vs winery-grown tonnes 2026 – major white varieties



Section 2

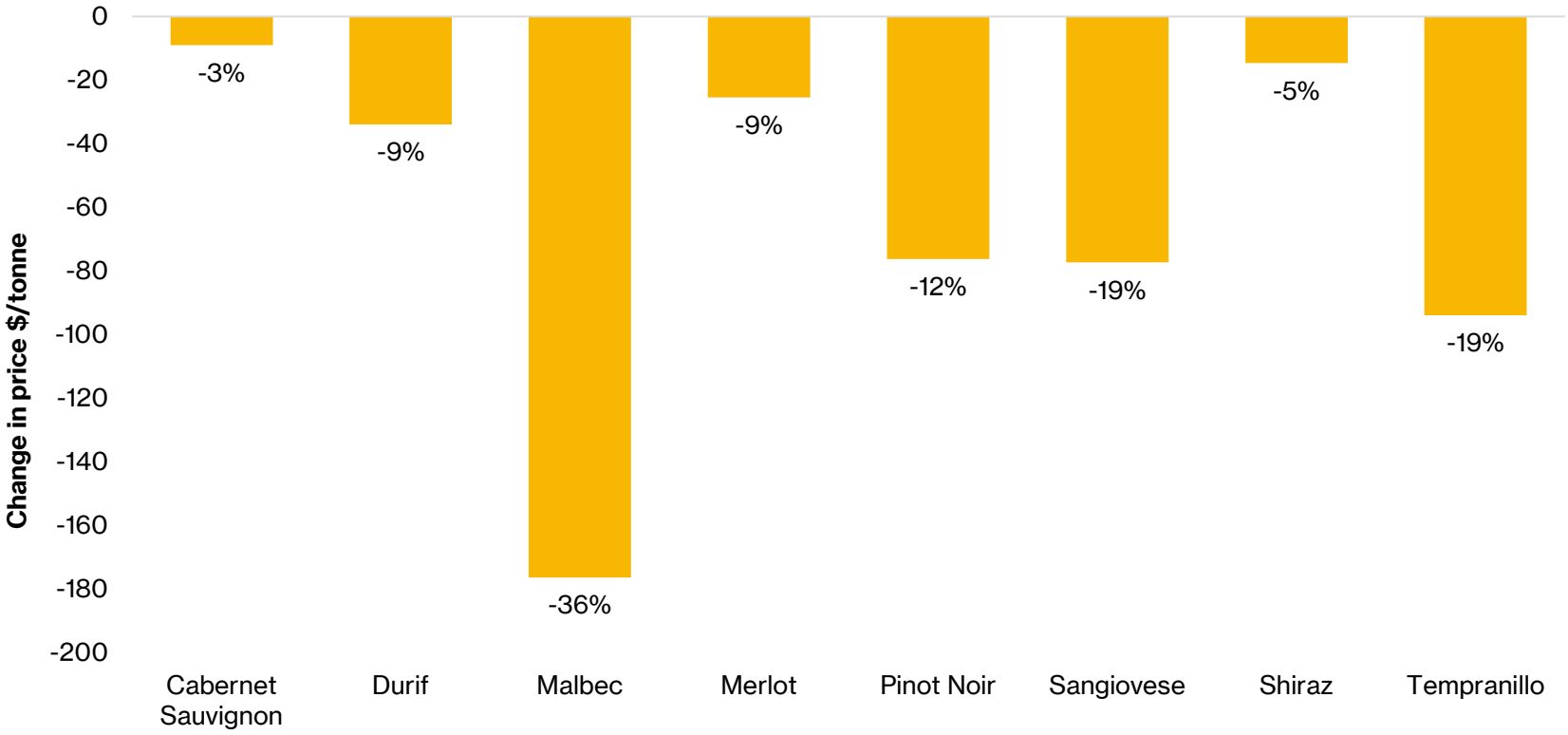
Wine grape value and tonnage data 2026

Intake and price summary data by variety 2026 – red varieties

	Purchased Grape Summary			Winery	2026 Total			2025 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									
Barbera	0				0	$300	0%		0
Cabernet Sauvignon	15,193	$4,202,257	$277	4,887	20,080	$5,547,236	27%	$286	39,109
Durif	537	$184,807	$344		537	$184,807	1%	$378	882
Graciano	15				15	$13,050	0%		20
Grenache	132			664	796	$135,073	1%	$361	1,253
Malbec	391	$121,632	$311	1,375	1,766	$746,616	2%	$487	2,470
Mataro/Mourvedre	50				50	$11,000	0%		98
Merlot	5,441	$1,467,846	$270	2,599	8,039	$2,190,242	11%	$295	14,513
Montepulciano	23			105	128	$64,048	0%		205
Muscat à Petits Grains Rouges	158				158	$48,957	0%	$453	233
Nebbiolo	0			22	23	$34,109	0%		26
Nero d'Avola	7			197	204	$130,702	0%		339
Petit Verdot	74			99	173	$34,629	0%	$256	348
Pinot Noir	5,749	$3,146,019	$547	1,726	7,474	$4,171,840	10%	$624	8,562
Ruby Cabernet	172				172	$29,519	0%	$254	505
Sangiovese	219	$72,933	$333		219	$72,933	0%	$411	854
Shiraz	18,085	$4,808,723	$266	9,747	27,832	$7,400,675	38%	$281	48,829
Tempranillo	161	$63,252	$394	59	220	$107,697	0%	$488	486
Other red	1,715	$646,817	$377	4,358	6,072	$3,718,637	8%	$388	7,282
Red Total	**48,122**	**$14,886,829**	**$309**	**25,838**	**73,960**	**$24,642,067**	**100%**	**$321**	**126,015**

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 2025 to 2026 – top purchased red varieties



Price dispersion 2026 – red varieties

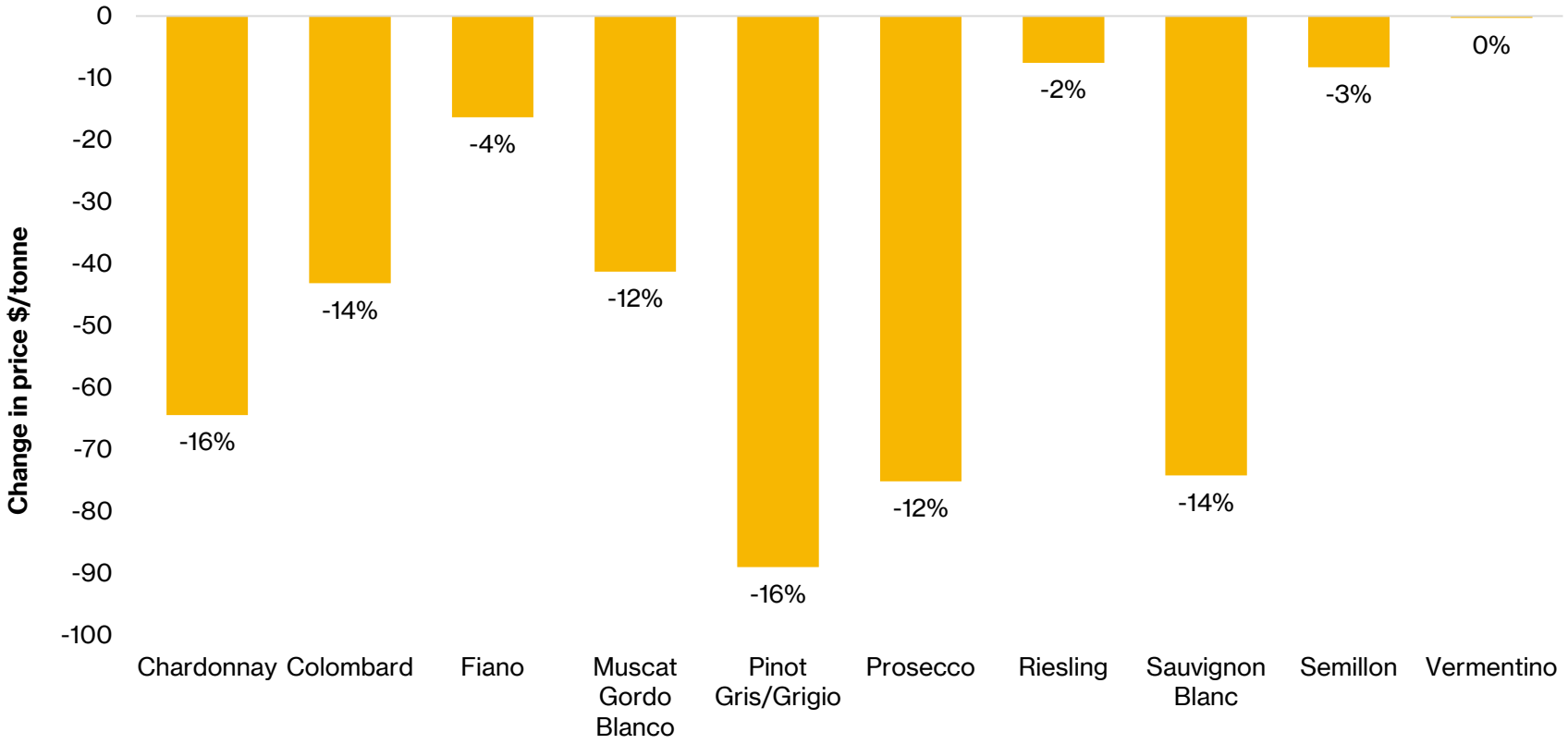
Varieties	Tonnes purchased in each price range						
	<$300	$300-<$400	$400-<$500	$500-<$600	$600-<$700	$700+	Total tonnes purchased
Red							
Barbera	0	0	0	0	0	0	0
Cabernet Sauvignon	8,675	4,474	2,044	0	0	0	15,193
Durif	132	157	249	0	0	0	537
Graciano	0	0	0	0	0	15	15
Grenache	129	0	3	0	0	0	132
Malbec	266	56	0	0	69	0	391
Mataro/Mourvedre	50	0	0	0	0	0	50
Merlot	2,888	2,126	426	0	0	0	5,441
Montepulciano	0	0	0	0	0	23	23
Muscat à Petits Grains Rouges	0	158	0	0	0	0	158
Nebbiolo	0	0	0	0	0	0	0
Nero d'Avola	0	0	0	0	0	7	7
Petit Verdot	74	0	0	0	0	0	74
Pinot Noir	0	0	906	2,670	2,105	68	5,749
Ruby Cabernet	172	0	0	0	0	0	172
Sangiovese	47	103	46	22	0	1	219
Shiraz	11,500	3,866	2,718	0	0	0	18,085
Tempranillo	68	51	0	0	0	41	161
Other red	83	733	652	239	0	7	1,715
Red Total	**24,085**	**11,726**	**7,044**	**2,930**	**2,174**	**162**	**48,122**

Intake and price summary data by variety 2026 – white varieties and total

	Purchased Grape Summary			Winery	2026 Total			2025 Summary	
Variety	Purchased Tonnes	Value of Fruit Purchased	Average Purchase Price	Winery Grown Tonnes	Total Tonnes	Estimated Total Value	Tonnes as % of Total Whites	Average Purchase Price	Total Tonnes
White									
Chardonnay	48,391	$16,404,012	$339	17,087	65,479	$22,630,293	40%	$403	80,068
Chenin blanc	71				71	$28,240	0%		53
Colombard	2,964	$816,861	$276	3,165	6,129	$1,792,330	4%	$319	9,870
Fiano	516	$208,576	$405	2,059	2,574	$892,799	2%	$421	2,853
Gewürztraminer	73				73	$27,831	0%		146
Muscat à Petits Grains Blancs	113			98	212	$63,985	0%	$355	818
Muscat Gordo Blanco	9,329	$2,785,418	$299	5,275	14,604	$4,284,841	9%	$340	17,755
Pinot Gris/Grigio	10,863	$5,084,320	$468	15,674	26,537	$12,271,366	16%	$557	32,839
Prosecco	4,921	$2,713,136	$551	2,562	7,483	$4,127,115	5%	$627	9,515
Riesling	195	$73,323	$377	402	596	$209,772	0%	$384	550
Sauvignon Blanc	21,930	$10,254,567	$468	7,359	29,289	$13,891,557	18%	$542	35,829
Semillon	5,441	$1,629,787	$300	614	6,055	$1,832,428	4%	$308	7,621
Verdelho	0	$0	$0	508	508	$157,981	0%		342
Vermentino	262	$118,390	$452	355	616	$233,629	0%	$453	792
Viognier	192	$59,033	$308	37	229	$72,266	0%	$344	391
Other white	978	$351,381	$359	1,923	2,901	$1,647,184	2%	$364	4,163
White Total	**106,239**	**$40,589,375**	**$382**	**57,117**	**163,356**	**$64,163,615**	**100%**	**$443**	**203,606**
Grand Total	**154,361**	**$55,476,204**	**$359**	**82,955**	**237,316**	**$88,805,682**		**$397**	**329,621**

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

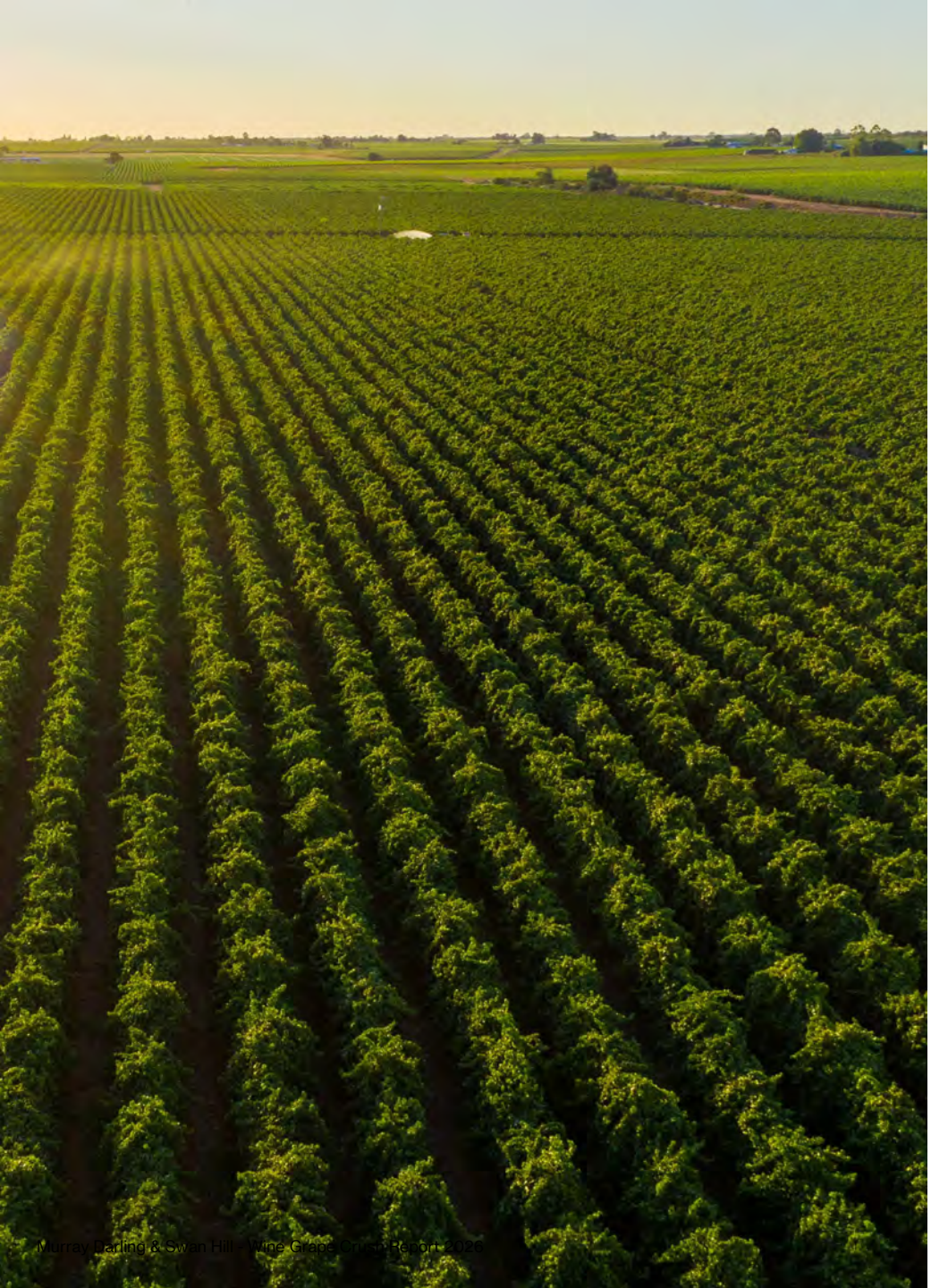
Change in average price per tonne 2025 to 2026 – top 10 purchased white varieties



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

Price dispersion 2026 – white varieties and total

Varieties	Tonnes purchased in each price range						
	<$300	$300-<$400	$400-<$500	$500-<$600	$600-<$700	$700+	Total tonnes purchased
White							
Chardonnay	4,182	39,786	4,279	145	0	0	48,391
Chenin blanc	0	0	71	0	0	0	71
Colombard	2,386	579	0	0	0	0	2,964
Fiano	46	373	44	11	0	41	516
Gewürztraminer	0	73	0	0	0	0	73
Muscat à Petits Grains Blancs	0	113	0	0	0	0	113
Muscat Gordo Blanco	3,790	5,539	0	0	0	0	9,329
Pinot Gris/Grigio	0	371	8,830	908	570	184	10,863
Prosecco	0	0	474	3,241	1,091	115	4,921
Riesling	0	90	104	0	0	0	195
Sauvignon Blanc	321	4,517	10,948	3,115	2,988	41	21,930
Semillon	1,269	4,171	0	0	0	0	5,441
Vermentino	0	101	147	0	0	14	262
Viognier	0	192	0	0	0	0	192
Other white	269	685	0	0	0	24	978
White Total	**12,262**	**56,592**	**24,897**	**7,420**	**4,649**	**419**	**106,239**
Total purchased	**36,347**	**68,319**	**31,942**	**10,350**	**6,823**	**581**	**154,361**



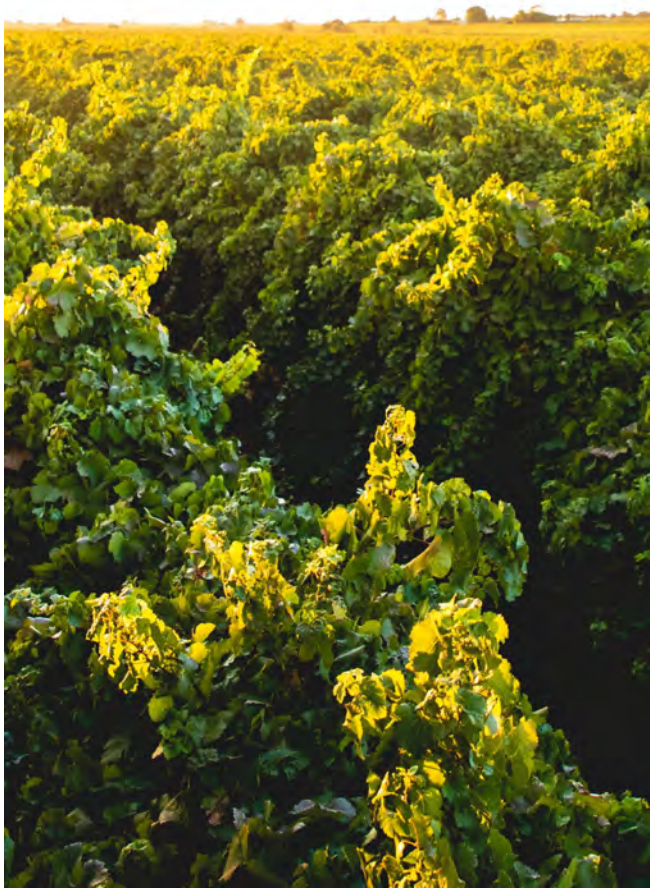
Section 3

About the survey

Respondents

Thank you to the following wineries that reported crushing grapes from Murray Darling and Swan Hill regions in 2026.

Andrew Peace Wines
Australian Vintage
Berton Vineyards
Brokenwood Wines
Brown Family Wine Group
Buller Wines
Casella Wines
Chalmers Wines
Duxton
Four Sisters
Gill Estate
Kingston Estate
Lowe Family Wine Company
McPherson Wines
Oxley Wine Company
Pfeiffer Wines
Qualia Wine Services
Redbank Wines
Sticks Wines
Symphony Hill Wines
Tar & Roses
The Bull Ant Wine Company
The Wine Group
Treasury Wine Estates
Trentham Estate
Vinarchy
Weilong Wine Company
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 2026. 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

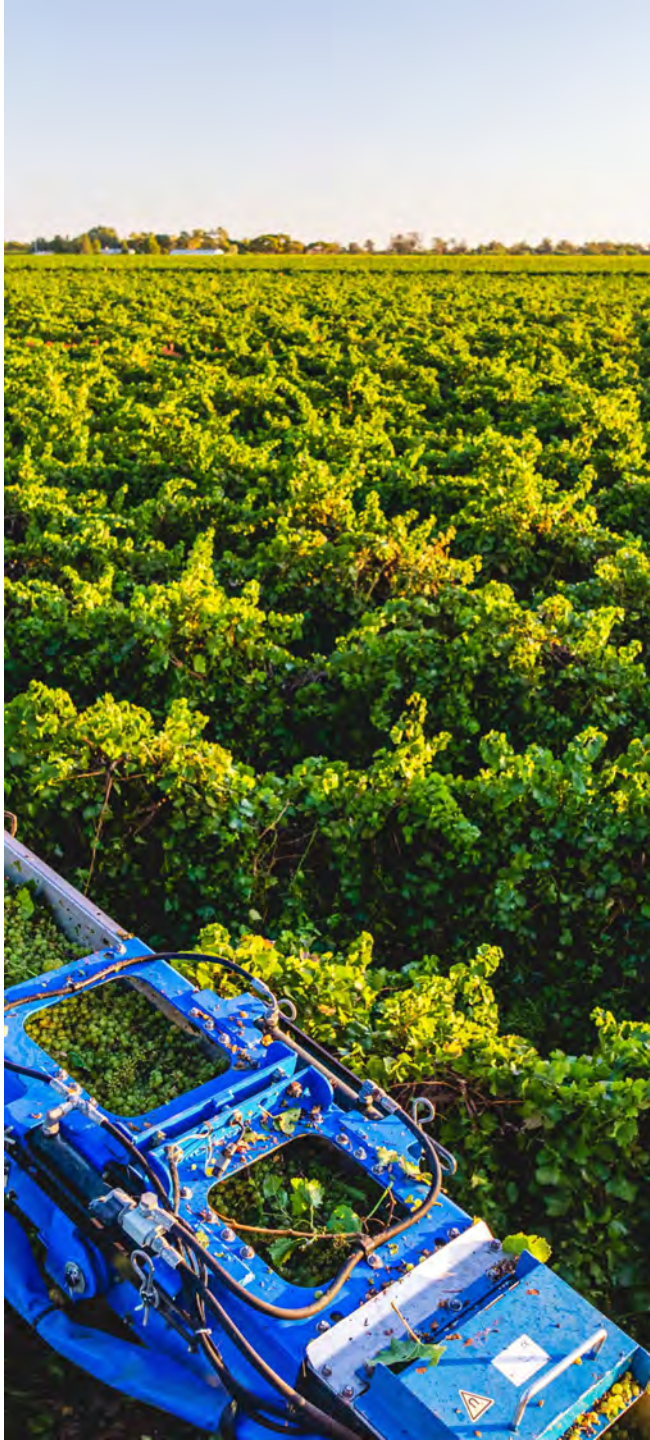
Disclaimer

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:

Wine Australia Market Insights
+618 8228 2000
market.insights@wineaustralia.com



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 87 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 2026).

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

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.