

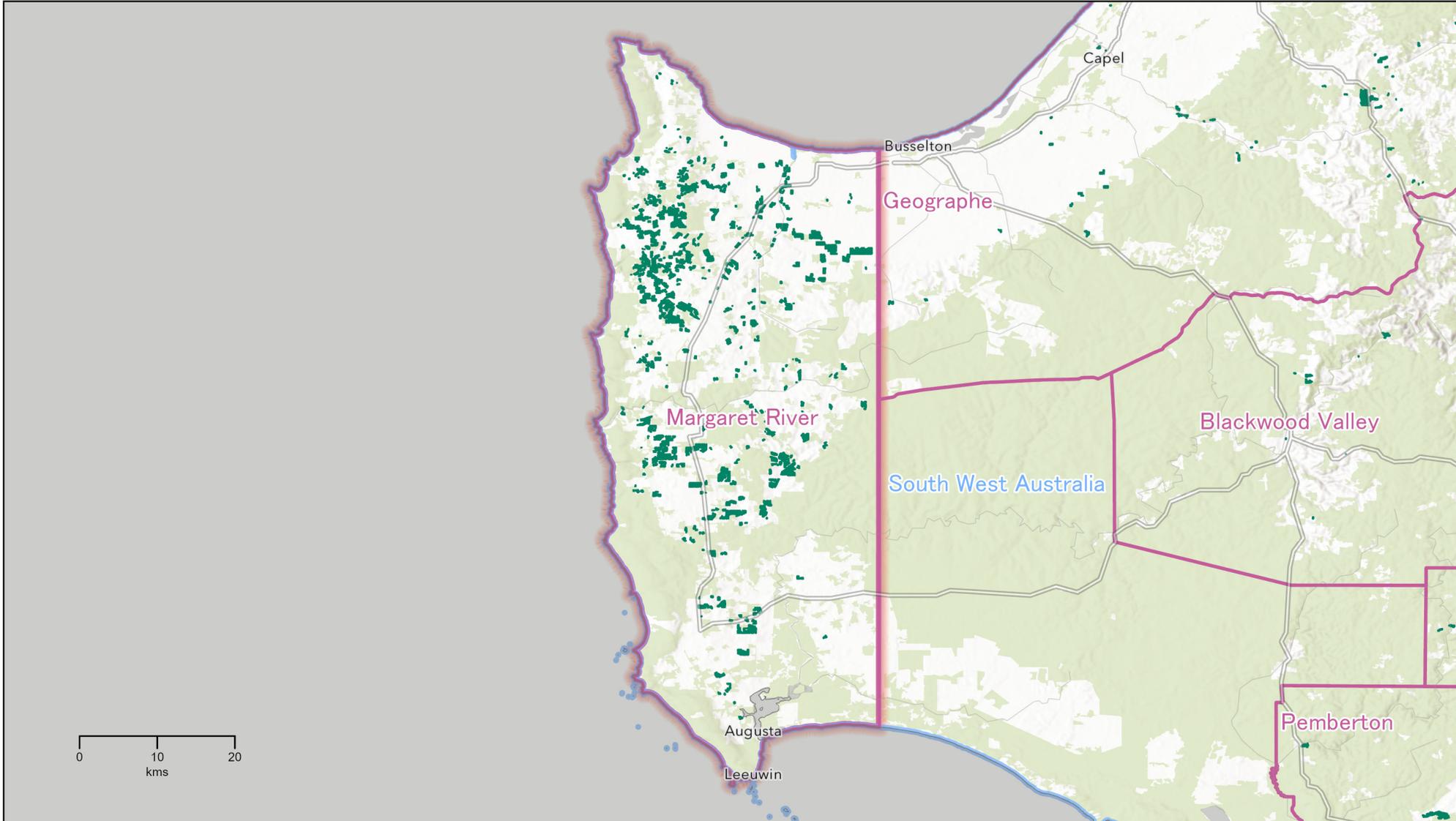


# National Vintage Survey 2020

## Regional Summary Report

### Margaret River

*Wine Australia July 2020*



**Wine  
Australia  
for  
Australian  
Wine**

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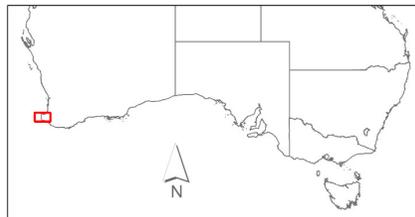
**Vineyard boundaries:** created and supplied by GAIA for the National Vineyard Scan 2019. Visit [gaia.ag](http://gaia.ag) for more information. This information is reproduced with the permission of GAIA Innovations

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

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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.

# Margaret River

## Regional snapshot

### VINEYARD AREA 2019

5671 hectares

### REPORTED CRUSH 2020

21,312 tonnes

### CLIMATE DATA

Source: Bureau of Meteorology (2019)

Margaret River					
Size (km <sup>2</sup> )	3 120	Elevation (m)	17-1338	Latitude	37° 73'
Time period	Mean Jan temp (MJT)	Annual* rainfall	Oct-April		
			GSR	GDD	
1961-1990 average	18.2 °C	1130 mm	573 mm	1238	
1991-2017 average	18.9 °C	1076 mm	559 mm	1301	
2017-18 season*	19.4 °C	898 mm	213 mm	1712	

\*July 2018-June 2019

Climate data is averaged across the whole Margaret River GI region.

### Top five varieties in 2020 (share by crush volume)

Cabernet Sauvignon	21%
Sauvignon Blanc	20%
Semillon	18%
Chardonnay	15%
Shiraz	15%
Others	11%

### Top five export markets by value (YE June 2020)

China	26%
UK	17%
USA	15%
Singapore	11%
Canada	5%
Others	25%

# Margaret River

## Vintage overview

### VINTAGE REPORT – MARGARET RIVER

At the start of the 2020 growing season, no one would have believed the situation the Australian wine industry is in right now.

However, it is during challenging times like these that we look for a silver lining, and the silver lining for the Margaret River region is the exceptional vintage that has just wrapped up.

The Margaret River wine industry finishes one of the most unusual harvests to date, the region raises a collective sigh of relief to have been able to complete the 2020 vintage undisrupted; without significant rain, lockdowns or the impact of bushfires and losses that sadly, some regions in other parts of Australia have had to endure.

The region enjoyed an early start to the season, with warmer than average spring temperatures evolving into the perfect summer growing conditions.

Low disease pressure, timely flowering of native Marri trees to keep the birds at bay and little to no rain meant that growers could literally “take their pick” when they wanted.

Compared with the challenges of cooler weather and significant bird pressure in 2019, the 2020 vintage in Margaret River was a real treat for viticulturists.

The only downside of note has been the lower than normal yields across all varieties, resulting in one of the smallest harvests in recent years.

Yet here is another silver lining... the lower yields have resulted in exceptional fruit that is physiologically ripe and shows divine concentration of aromas and flavours.

While the 2020 vintage from Margaret River will be in scarce supply, it will be a very special vintage to look out for.

Our thoughts go out to all those who have been adversely impacted by the current pandemic. We hope to raise a toast in acknowledgment of the difficult days we've survived when we get through to the other side of this.

### *Growing Season*

After a significantly wet winter with rainfall 30% above average, temperatures gradually crept up to above long-term ranges while rainfall fell well below norms as spring commenced.

Regular heat-waves through the months of October, November and December saw maximum daytime temperatures regularly in the mid 30's. These periods of high temperatures caused an acceleration in grape development, fortunately without the related sunburn which can occur if such heat occurs after veraison.

Chardonnay was first out of the blocks with an early budburst at the end of August. This allowed the soil to dry and warm, providing ideal conditions for early root growth and optimal access to nutrients. As other varieties commenced their growth, we saw development of healthy, well-balanced canopies across the region.

The beautiful weather and lower yields gave sufficient time for fruit to reach its best without the pressure of a premature harvest date due to disease or poor conditions.

### *Harvest Conditions*

Harvest began at the end of January, the earliest start on record, brought on by lower yields and warm, dry weather which ripened the fruit more rapidly than is usual. The warm daytime temperatures saw the first half of the vintage race along with all white grapes harvested by the end of February, a very early finish for the white's harvest.

A weak, cold front brought approximately 35mm of rain in late February to early March and daytime temperatures moderated in mid-March which was very beneficial in slowing things down and allowing softening and ripening of tannins and great flavour development.

By the end of March to early April most of the region had finished their Cabernet Sauvignon harvest, the latest ripening varietal in the region.

# Margaret River

## Vintage overview

### VINTAGE REPORT – continued

#### *Yields*

The 2020 yields are below the long-term average due to several factors, rather than a specific incident.

There were colder than average spring conditions in 2018 when the fruit load is determined in developing buds for the next season.

In the spring of 2019, isolated patches of hail, widespread winds and rain caused damage to vine shoots and impacted flowering and fruit-set with varieties which were at a sensitive growth stage on exposed sites in the region, creating low bunch weights.

The dry growing season also contributed to lighter than average bunch weights across most varieties.

#### *Fruit Profile*

It has been a sensational Chardonnay vintage, with wonderful complexity, balance, concentration of flavours and clean, pristine fruit.

With the accelerated ripening, there is incredible retention of natural acidity, texture and loads of energy.

Sauvignon Blanc is showing excellent early floral characters while the Semillon shows richness and roundness.

The other whites have also been sensational with fruit displaying purity, freshness and excellent varietal expression.

Shiraz loved the warmth with good depth of flavour, a bright fruit spectrum and lovely tannins with medium weight.

Cabernet Sauvignon is showing excellent potential, with loads of colour, concentration, dark fruit vibrancy and the standout feature of lovely fine soft tannins. Across the board, the quality is outstanding.

#### *Margaret River Wine Association*

### OVERVIEW OF VINTAGE STATISTICS

The 2020 reported crush from Margaret River was 21,312 tonnes, a 5 per cent increase compared with 2019.

Over the last 5 years (2015-2019), the average Margaret River reported production has been 19,314 tonnes, with a low of 16,993 tonnes in 2015. The 2020 crush was 10 per cent above the 5-year average.

Crush figures collected by the Agricultural Produce Commission in Western Australia indicates that the total crush for Margaret River is between 30,000 and 40,000 tonnes, indicating that there is a significant non-response rate for this region in the National Vintage Survey. The non-response rate nationally is estimated to be 9.5 per cent.

There were 59 respondents to the survey who reported crushing grapes from Margaret River in 2020, compared with 62 in 2019. The total value of reported grapes from the region is estimated to be just under \$30 million, almost identical to the estimated value in 2019.

The average purchase value for the major varieties generally increased slightly, with Cabernet Sauvignon up by 4 per cent to \$1881 per tonne and Sauvignon Blanc up by 2 per cent to \$1123 per tonne. The average value of Semillon decreased by 3 per cent to \$1016 per tonne. Purchased fruit accounts for 59 per cent of the crush in Margaret River, compared with 67 per cent nationally.

The total planted area in Margaret River is estimated to be 5671 hectares, based on the National Vineyard Scan 2019. This gives an overall average reported yield in 2020 of 3.8 tonnes per hectare.

# Margaret River

## Winegrape intake summary table – red varieties

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					Total value purchased grapes	Average value of purchased grapes	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+							
<b>Red</b>													
Cabernet Franc	28			3	16	8	\$50,274	\$1,802	9%	31	52%	59	\$105,486
Cabernet Sauvignon	2,727			716	1,037	974	\$5,130,349	\$1,881	4%	1,653	38%	4,380	\$8,240,339
Graciano										6	100%	6	\$10,396
Grenache	2				2					13	89%	14	\$25,490
Malbec	73			2	32	39	\$151,751	\$2,080	1%	96	57%	169	\$351,386
Merlot	553		3	452	86	12	\$717,403	\$1,296	14%	384	41%	937	\$1,214,917
Muscat a petits grains rouges	31			31						11	26%	42	\$58,288
Nebbiolo										2	100%	2	\$3,475
Petit Verdot	28				8	20	\$55,801	\$1,997	-2%	34	55%	62	\$122,938
Pinot Noir	50			5	45		\$83,540	\$1,671	9%	42	45%	92	\$153,197
Sangiovese	5				5					11	67%	16	\$26,282
Shiraz	1,967			1,467	458	42	\$2,493,535	\$1,268	6%	1,274	39%	3,241	\$4,108,199
Tempranillo	42			16	21	4	\$63,022	\$1,510	1%	72	63%	114	\$171,614
Touriga Nacional										2	100%	2	\$4,658
Other red	11					8				12	51%	23	\$41,353
<b>Red total</b>	<b>5,517</b>		<b>3</b>	<b>2,693</b>	<b>1,718</b>	<b>1,103</b>	<b>\$8,820,459</b>	<b>\$1,599</b>	<b>3%</b>	<b>3,641</b>	<b>40%</b>	<b>9,157</b>	<b>\$14,638,016</b>

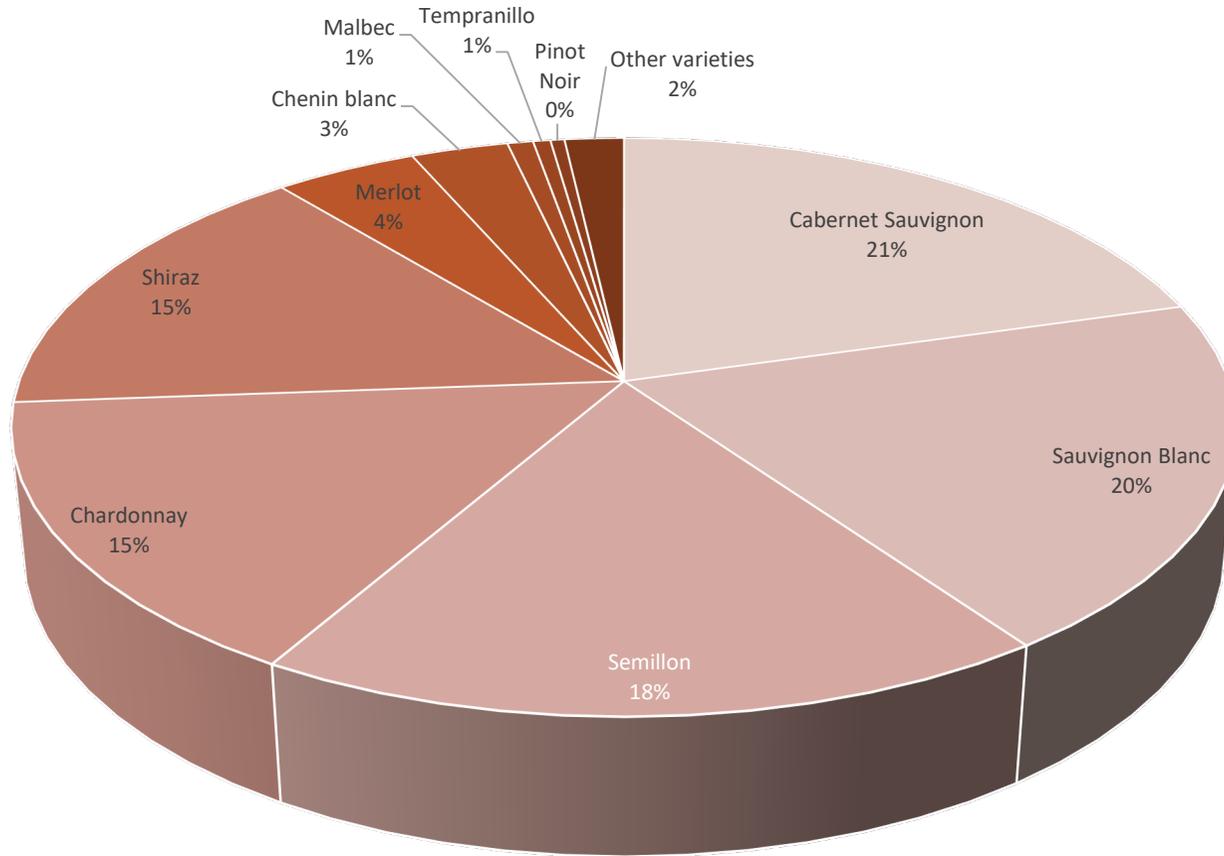
# Margaret River

## Winegrape intake summary table – white varieties

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					Total value purchased grapes	Average value of purchased grapes	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+							
<b>White</b>													
Chardonnay	1,717			260	1,007	449	\$3,035,079	\$1,768	0%	1,579	48%	3,296	\$5,826,911
Chenin blanc	501			498	3		\$431,681	\$861	0%	136	21%	637	\$549,000
Fiano	1			1						6	86%	7	\$9,460
Gewurztraminer										0	100%	0	\$292
Marsanne										3	100%	3	\$4,594
Muscat a petits grains blancs	1					1				17	96%	17	\$34,748
Muscat Gordo Blanco										1	100%	1	\$550
Pinot Gris/Grigio	19			5	15		\$30,374	\$1,581	13%	21	52%	40	\$63,350
Riesling										3	100%	3	\$4,390
Sauvignon Blanc	2,545			2,160	369	17	\$2,857,718	\$1,123	2%	1,638	39%	4,183	\$4,697,539
Semillon	2,198		43	2,023	129	4	\$2,234,229	\$1,016	-3%	1,676	43%	3,874	\$3,937,866
Verdelho	20			18	2		\$22,170	\$1,102	-8%	23	53%	43	\$47,646
Vermentino										4	100%	4	\$5,812
Viognier	6			2	4					23	78%	30	\$43,576
Other white	2				2					11	84%	13	\$24,230
<b>White total</b>	<b>7,011</b>		<b>43</b>	<b>4,967</b>	<b>1,531</b>	<b>470</b>	<b>\$8,627,163</b>	<b>\$1,231</b>	<b>-4%</b>	<b>5,143</b>	<b>42%</b>	<b>12,154</b>	<b>\$15,249,964</b>
<b>Grand total</b>	<b>12,528</b>		<b>46</b>	<b>7,660</b>	<b>3,249</b>	<b>1,573</b>	<b>\$17,447,622</b>	<b>\$1,393</b>	<b>-1%</b>	<b>8,784</b>	<b>41%</b>	<b>21,312</b>	<b>\$29,887,980</b>

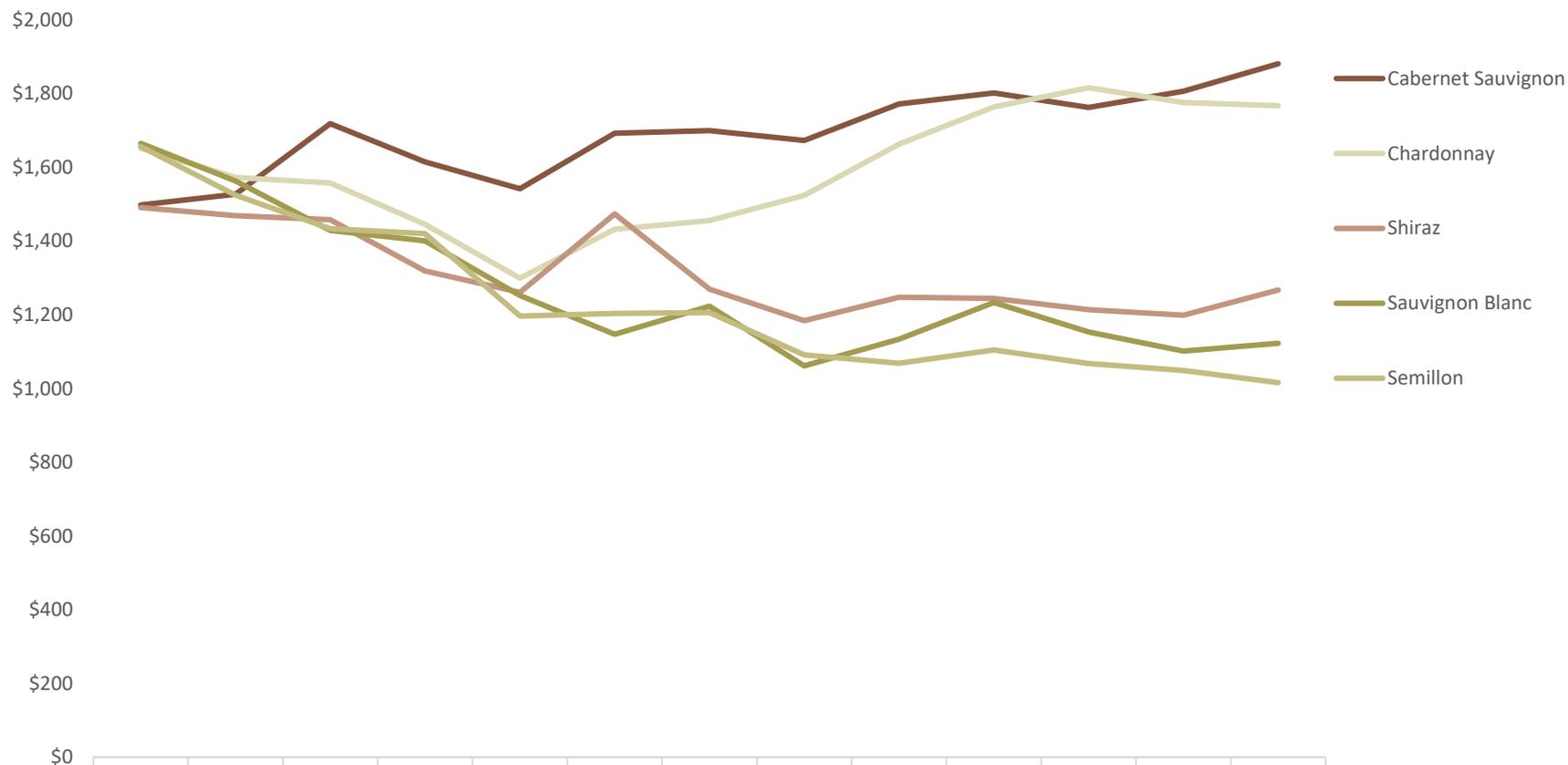
# Margaret River

## Share of crush by variety - 2020



# Margaret River

## Historical weighted average price for major varieties



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cabernet Sauvignon	\$1,498	\$1,527	\$1,719	\$1,615	\$1,542	\$1,693	\$1,700	\$1,673	\$1,773	\$1,802	\$1,763	\$1,807	\$1,881
Chardonnay	\$1,652	\$1,573	\$1,558	\$1,446	\$1,300	\$1,432	\$1,456	\$1,524	\$1,663	\$1,764	\$1,817	\$1,777	\$1,768
Shiraz	\$1,491	\$1,469	\$1,458	\$1,319	\$1,261	\$1,474	\$1,270	\$1,184	\$1,248	\$1,245	\$1,214	\$1,199	\$1,268
Sauvignon Blanc	\$1,665	\$1,563	\$1,429	\$1,401	\$1,252	\$1,147	\$1,223	\$1,062	\$1,134	\$1,234	\$1,154	\$1,102	\$1,123
Semillon	\$1,657	\$1,525	\$1,434	\$1,420	\$1,197	\$1,204	\$1,206	\$1,092	\$1,069	\$1,105	\$1,068	\$1,049	\$1,016

# 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 2020. The Margaret River Regional Summary Report has been prepared by Wine Australia on behalf of the Margaret River Wine Association.

### 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 credit: Wine Australia

### Disclaimer

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Note: data published in this report supercedes that in earlier reports. Minor variations in reported figures can occur due to data revisions.

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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").

### *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 receipt – 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 2019).

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.