

Wine  
Australia

# National Vintage Report 2024



## At a glance summary

- The 2024 Australian winegrape crush is estimated to be 1.43 million tonnes, 112,390 tonnes (9 per cent) more than the crush of 1.31 million tonnes in 2023
- The 2024 crush is 18 per cent below the 10-year average of 1.73 million tonnes, and the third vintage in the past 5 years that has been below the long-term average
- The crush of red varieties in 2024 declined by 1 per cent to an estimated 705,489 tonnes. This is 24 per cent below the 10-year average and the smallest crush of red varieties since 2007.
- The crush of white varieties was up by 19 per cent to 721,519 tonnes, but still 10 per cent below its 10-year average of 804,854 tonnes and the second-smallest since 2007.
- The white winegrape share of the crush increased to 51 per cent – the first time since 2014 that the white crush has been higher than the red crush.
- Chardonnay had the largest crush with 332,643 tonnes, and overtook Shiraz to resume the title of top variety by crush size that it last held in 2013.
- Shiraz declined by 14 per cent to 297,868 tonnes, its smallest crush since 2007 and 31 per cent below its 10-year average of 430,903 tonnes.
- South Australia (SA) accounted for the largest share of the national crush tonnes with 49 per cent, declined by 4 per cent and lost 6 percentage points of share to the other states
- All other states increased in crush except WA (down 10 per cent)
- Tasmania crushed an estimated record 16,702 tonnes
- The grape crush value is estimated to be \$1.01 billion, a 2 per cent increase over the previous year.
- The overall average value decreased by 5 per cent from \$642 per tonne to \$613 per tonne.

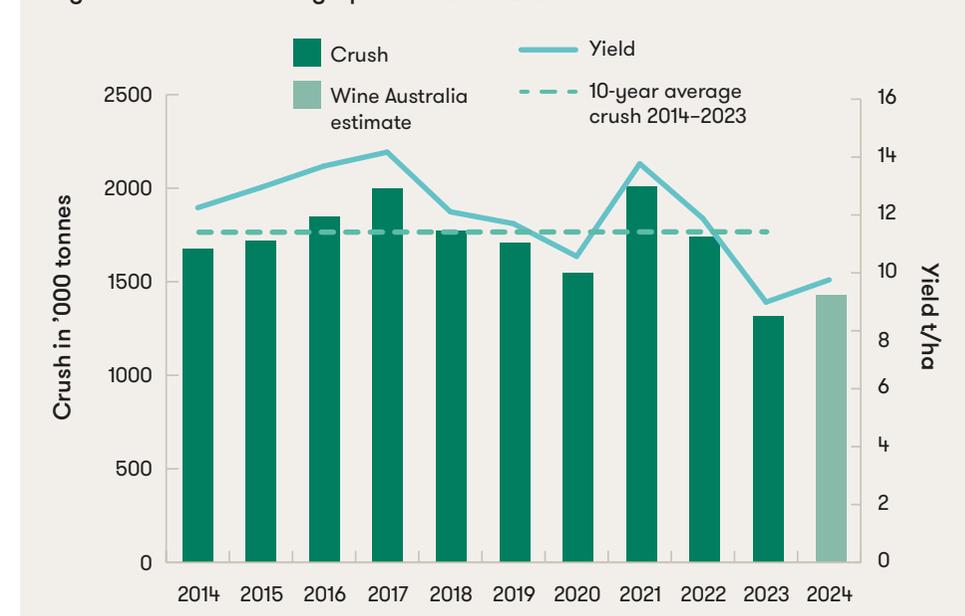
## Overview of the 2024 winegrape crush

After 2023 saw the lowest crush in more than 20 years, the 2024 vintage was up by 9 per cent, but was still well below the 10-year average.

The 2024 Australian winegrape crush is estimated<sup>1</sup> to be 1.43 million tonnes, 112,390 tonnes more than the crush of 1.31<sup>2</sup> million tonnes in 2023, and closely aligned to the drought-affected 2007 vintage (also 1.43 million tonnes).

The 2024 crush is 18 per cent below the 10-year average of 1.73 million tonnes, and the third vintage in the past 5 years that has been below the long-term average (Figure 1). Despite a record crush in 2021, the five-year average (2019–2023) is now 1.66 million tonnes, showing an overall declining trend.

Figure 1: Australian winegrape crush 2014–2024



<sup>1</sup> Based on responses to the National Vintage Survey 2024 and scaled up to account for non-responses

<sup>2</sup> Department of Agriculture, Fisheries and Forestry, June 2024



## Vintage conditions

The below-average sized crush can be attributed to a number of seasonal factors as well as various forms of human intervention driven by economic considerations and market forces.

Major global-scale climate influences on the Australian climate in 2023 were a La Niña at the start of the year, an El Niño and a strong positive Indian Ocean Dipole which were established in early spring, and a positive phase of the Southern Annular Mode towards the end of the year.

The positive Southern Annular Modulation (SAM) caused extensive high-pressure systems, resulting in strong winds.

Australia had its eighth-hottest year on record in 2023, and the warmest winter. By contrast, autumn 2024 was relatively cool; the national mean temperature for autumn was the coolest since 2012.

Rainfall across the whole year was above the 1961–1990 average for most of Australia, but below average for Tasmania, southern Western Australia and parts of southern Victoria, eastern and south-western South Australia. Most of the rain fell later in the year; winter rainfall was below average, and August–October was Australia’s driest three-month period since records began in 1900.

Notable weather events affecting various regions at different times included heavy rainfall and significant flooding, major thunderstorms, hail events, severe winds and heatwaves. Widespread windy conditions affected flowering in many regions,

leading to reduced fruit set and yield potential, while the dry spring weather led to cold nights and the potential for frost damage.

Based on comments provided by respondents to the 2024 National Vintage Survey, different regions experienced a wide range of outcomes, from “complete disasters” to “excellent” vintages, highlighting the variability in conditions and impacts. Many regions experienced low yields due to various factors including frost, poor fruit set, birds and disease. This is the third low-cropping year in a row for some areas. However, despite challenges, some regions including Coonawarra and the Granite Belt reported achieving long-term average or high yields.

Many regions experienced a compressed vintage due to the dry conditions and heat in late summer and early autumn.

Notwithstanding the impact of these seasonal factors, a significant amount of the reduction in overall crush size compared with the 10-year average can be attributed to deliberate decisions made by grapegrowers and wine businesses, driven by low grape prices, significant stock overhangs and reduced global demand for wine despite the very small 2023 vintage. These decisions include reduced purchasing of uncontracted fruit and the imposition of yield caps by wineries, and management of vineyards to reduce crops, harvesting of grapes to the ground, resting of vineyards and vine removals by grapegrowers.

The National Vintage Survey cannot capture how many tonnes were not harvested or produced, as it only collects information from wineries on grapes that are crushed.

# Vintage by colour and variety

The overall increase in the crush in 2024 was driven entirely by white varieties, while red varieties declined slightly.

The total crush increased in 2024 by 112,390 tonnes compared with 2023. White varieties<sup>3</sup> increased by an estimated<sup>4</sup> 117,338 tonnes (19 per cent), while reds decreased by 4,948 tonnes (1 per cent).

The crush of red varieties in 2024 is estimated to be 705,489 tonnes. This is the smallest crush of red varieties since 2007, 24 per cent below the 10-year average of 928,133 tonnes and nearly 40 per cent below its peak of 1.2 million tonnes in 2021. The net decrease of 1 per cent was a result of a 7 per cent decline in the red crush from the cool/temperate regions<sup>5</sup>, partly offset by an increase of 3 per cent in the estimated red crush from the warm inland regions<sup>6</sup> (Figure 2).

The crush of white varieties in 2024 is estimated to be 721,519 tonnes, 19 per cent higher than in 2023 but still 10 per cent below its 10-year average of 804,854 tonnes and the second-smallest since 2007.

The increase in whites came almost entirely from the warm inland regions, which increased by 111,633 tonnes (a 24 per cent increase), while the white crush from other regions increased by 5,705 tonnes (4 per cent). Seasonal impacts, particularly windy conditions at flowering, are thought to have been the main factor reducing crush size for whites in regions such as the Adelaide Hills.

The different results for red and white led to whites increasing their share of the crush from 46 per cent in 2023 to 51 per cent in 2024. It was the first time since 2014 that the white crush was higher than the red crush (Figure 3).

<sup>3</sup> Grapes are classified according to their skin colour, even though some red grapes (eg Pinot Noir) may be used in white wine.

<sup>4</sup> All figures in this section are raised compared with the numbers actually collected in the National Vintage Survey, to account for the non-respondent share, which is calculated to be 12 per cent of the crush in 2024.

<sup>5</sup> All GLs except the three identified below as warm inland

<sup>6</sup> The Riverland (South Australia), Murray Darling-Swan Hill (NSW and Victoria) and Riverina (NSW)

Figure 2: Change in crush by colour and location in 2024

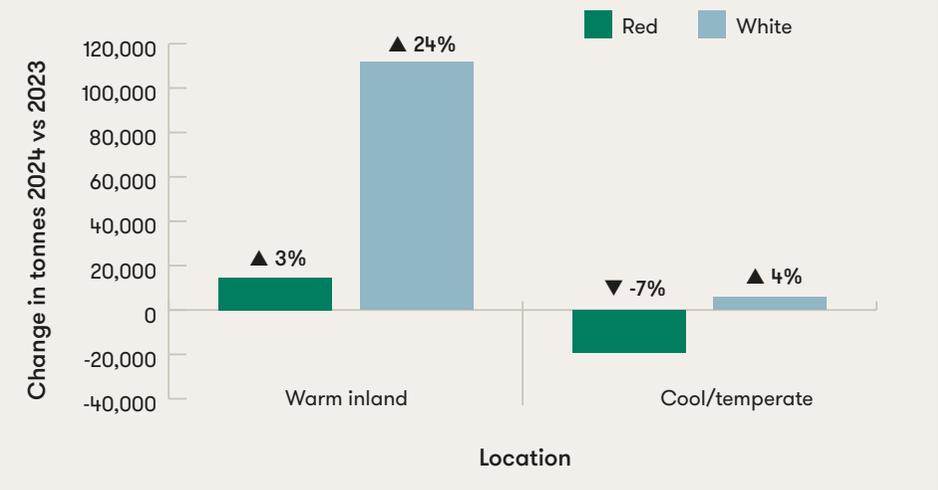
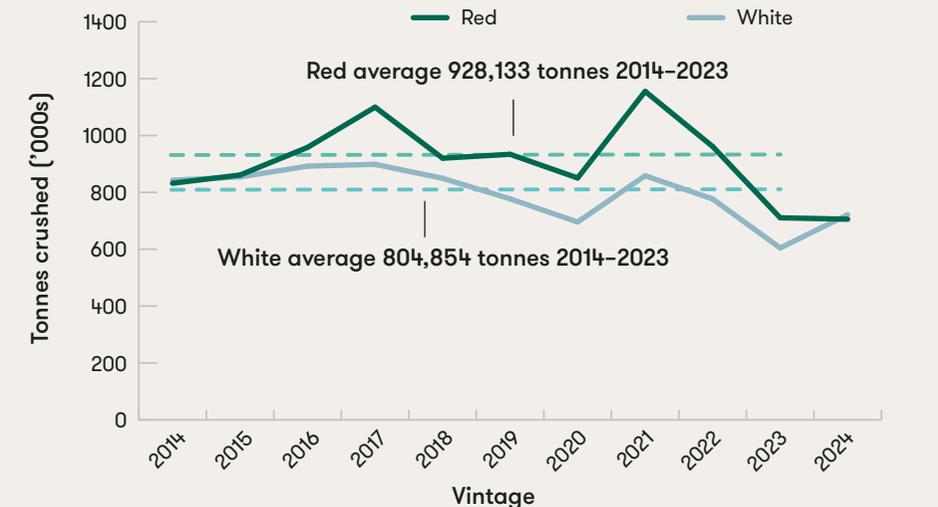


Figure 3: Winegrape crush by colour 2014-2024

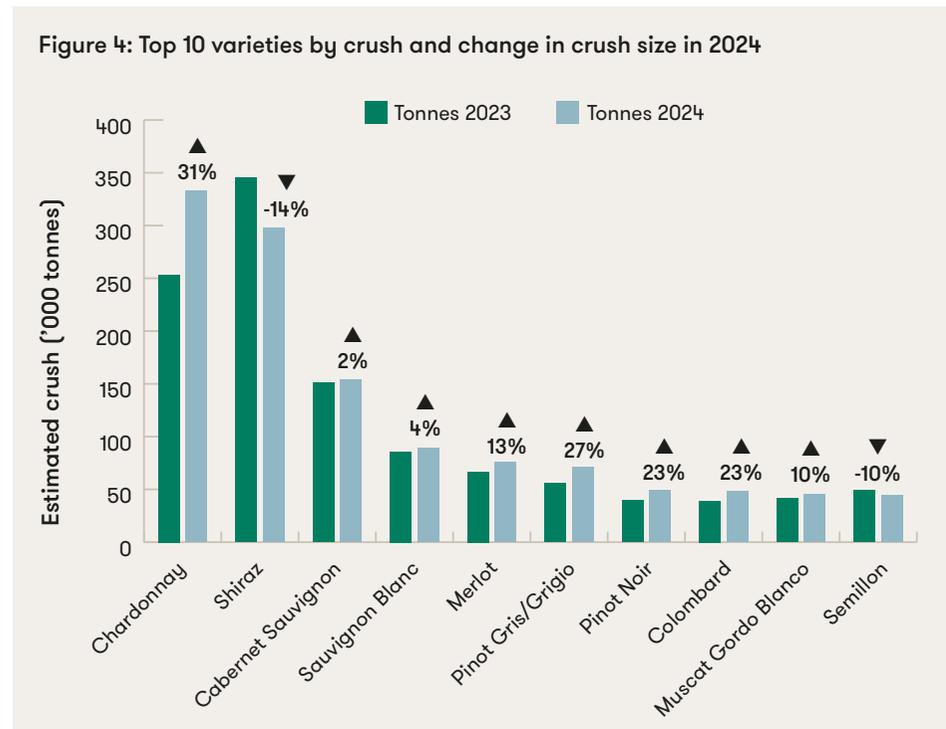


Looking at the top 10 varieties nationally, Chardonnay had the largest crush with 332,643 tonnes, and overtook Shiraz to resume the title of top variety by crush size that it last held in 2013. There were no other changes to the composition and order of the top 10, except that Semillon dropped from ninth to tenth (Figure 4).

Shiraz declined by 14 per cent to 297,868 tonnes, its smallest crush since 2007 and 31 per cent below its 10-year average of 430,903 tonnes.

Chardonnay increased by 31 per cent to 332,643 tonnes, still 8 per cent below its 10-year average of 359,925 tonnes and the third-smallest crush in the past 20 years.

All other varieties in the top 10 increased except for Semillon, which decreased by 10 per cent. Apart from Chardonnay, Pinot Gris/Grigio had the largest increase in percentage terms (up 27 per cent) and Cabernet Sauvignon the smallest (up 2 per cent).



The top 10 white varieties did not change in composition or order, except that Semillon dropped two places, from fourth to sixth, with a decline of 10 per cent in crush. Most varieties showed double-digit growth compared with 2023, except for Sauvignon Blanc (up 4 per cent) and Riesling (up 8 per cent). Gewürztraminer declined by 3 per cent (Figure 5).

This group of 10 made up 96 per cent of the total white crush.

Among the top 10 reds, the only change was that Ruby Cabernet reappeared at number 9 after a 59 per cent increase, causing Sangiovese to drop out despite a 15 per cent increase. The top 10 accounted for 91 per cent of all reds, a smaller share than in 2023 (93 per cent).

Overall, the top 10 reds and top 10 whites accounted for 94 per cent of the total estimated crush in 2024.

Details of all the major varieties can be found in Table 3 on page 15.

Figure 5: Estimated crush of top 10 white varieties and year-on-year change

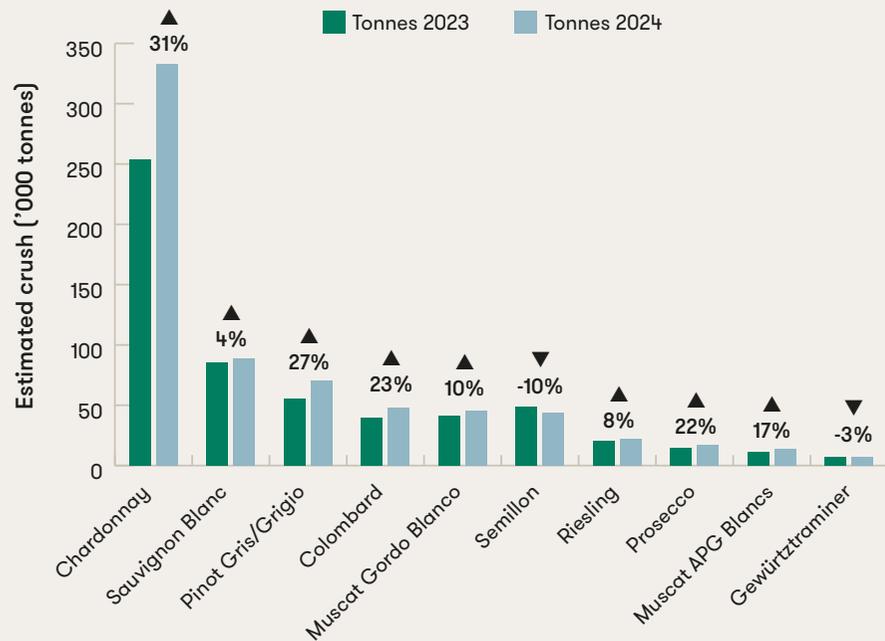
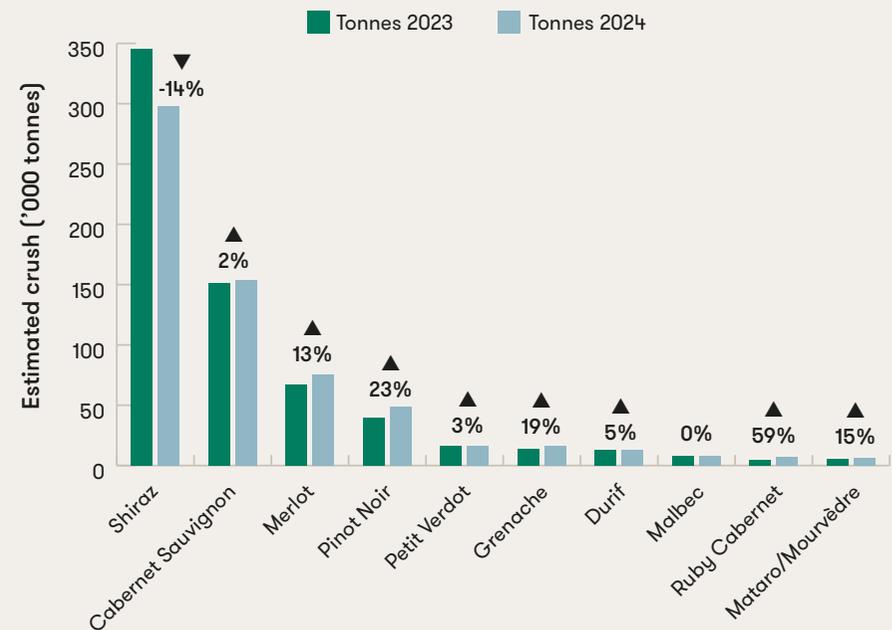


Figure 6: Estimated crush of top 10 red varieties and year-on-year change





## Other varieties

In addition, respondents to the survey reported a further 73 red and 58 white varieties, accounting for the remaining 6 per cent (92,653 tonnes). Some of these are individually reported in the national and regional intake summary tables, while others are grouped under 'other red' or 'other white' because of their small volumes and/or small number of reporting wineries. Table 4 on page 16 provides more detail on the minor varieties crushed in Australia, as reported by respondents to the National Vintage Survey 2024. There are 57 varieties listed in table 4, for which total reported crush figures can be provided on request. There are a further 30 red and 22 white varieties reported by at least one winery in 2024 – including some that are not reported by name. These are not listed individually, to protect the confidentiality of the respondents.

# Crush by state and region

South Australia (SA) accounted for the largest share of the national crush tonnes, but lost 6 percentage points of share to the other states, particularly Victoria. All states increased in crush size except SA and WA.

The estimated crush from South Australian vineyards in 2024 was 702,344 tonnes, a decrease of 4 per cent compared with 2023 and 19 per cent below its 10-year average. It accounted for 49 per cent of the national crush.

The second-largest state by crush size was New South Wales (NSW) with an estimated 417,965 tonnes. This was up 18 per cent compared the previous year but still 21 per cent below its 10-year average. It accounted for 29 per cent of the national crush compared with 27 per cent in 2023.

The third-largest state by crush size was Victoria. The estimated crush from Victorian vineyards was 248,105 tonnes, up 43 per cent year-on-year but still 13 per cent below its 10-year average.

The largest three states together accounted for 96 per cent of the national crush (Figure 7).

Of the other states, WA was the largest with an estimated 41,113 tonnes, a decrease of 10 per cent year-on-year following a very dry vintage in 2024, but 5 per cent above its 10-year average. Tasmania is estimated to have crushed a record 16,702 tonnes, 42 per cent above the 2023 crush and 57 per cent above its 10-year average of 10,614 tonnes, as a result of improved yields after four low-yielding years, combined with continued new plantings.

The estimated crush from Queensland also increased, up 45 per cent compared with 2023, but from a very small base. Variations in the response rate may have had a particularly large impact on the figures from the smaller states.

Figure 7: Share of national crush by state in 2024

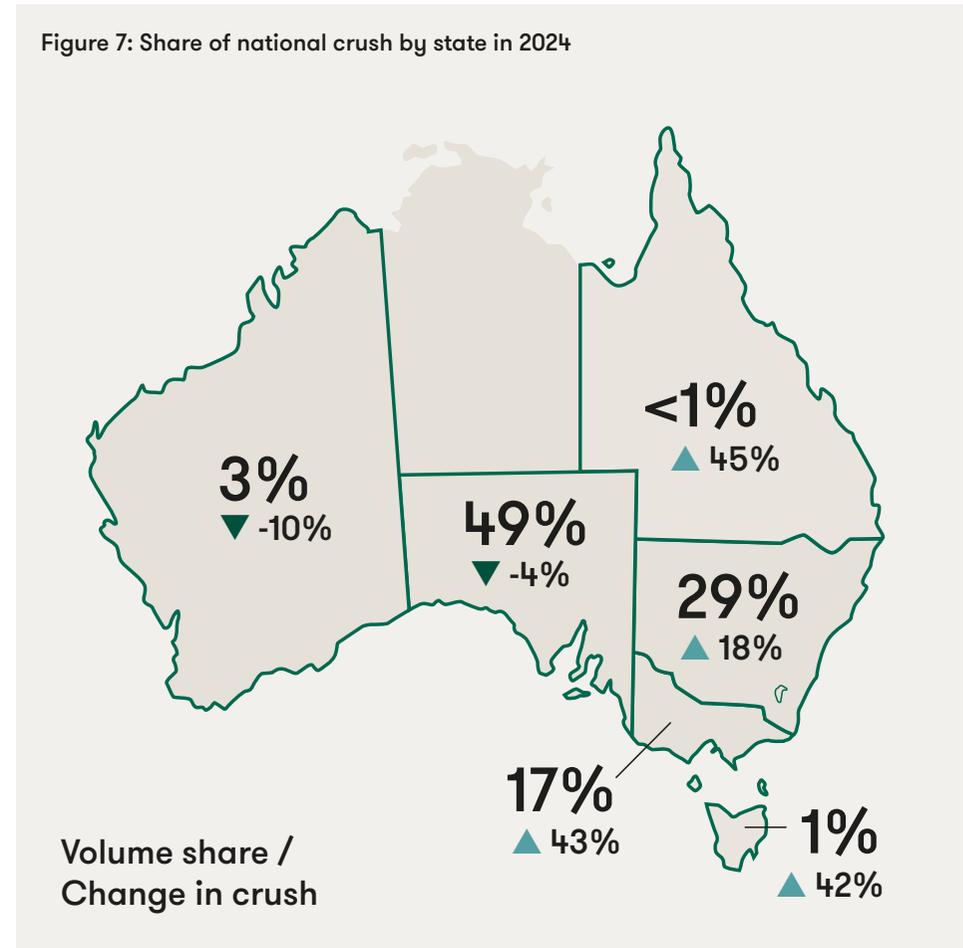
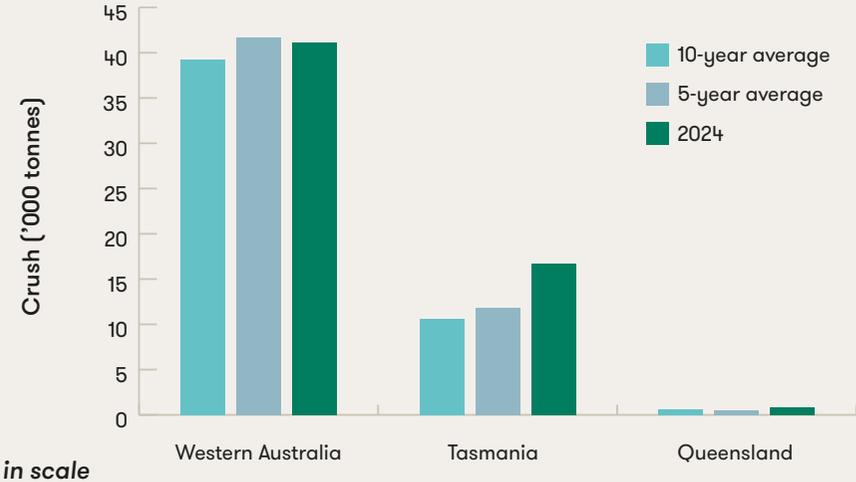


Figure 8: Long-term trends in crush by state (top 3 states)



Figure 9: Long-term trends in crush by state (smaller states)



Looking at the crush over time, the three largest states have shown a decreasing trend, with the 5-year average smaller than the 10-year average, and the 2024 crush smaller than both (Figure 8). Conversely, the three smaller states have shown a general trend of increasing size (Figure 9) – although this could be partially attributable to an improvement in response rates over time.

The three large inland regions – Riverina (NSW), Murray Darling – Swan Hill (NSW and Vic) and the Riverland (SA) – together accounted for 72 per cent of the national crush, returning to their 10-year average share after dropping to 68 per cent in 2023. The crush itself for these inland regions combined is estimated to be 1.03 million tonnes, 18 per cent below the 10-year average of 1.25 million tonnes but 14 per cent higher than the previous year’s crush of just 898,242 tonnes.

Conversely, the rest of Australia<sup>7</sup> saw a decrease in estimated tonnes from 416,376 tonnes to 401,307 tonnes (down 4 per cent) – the second-smallest crush in the past 10 years (the smallest was 332,029 tonnes in 2020) and 17 per cent below the 10-year average.

<sup>7</sup> Referred to as ‘cool/temperate regions’

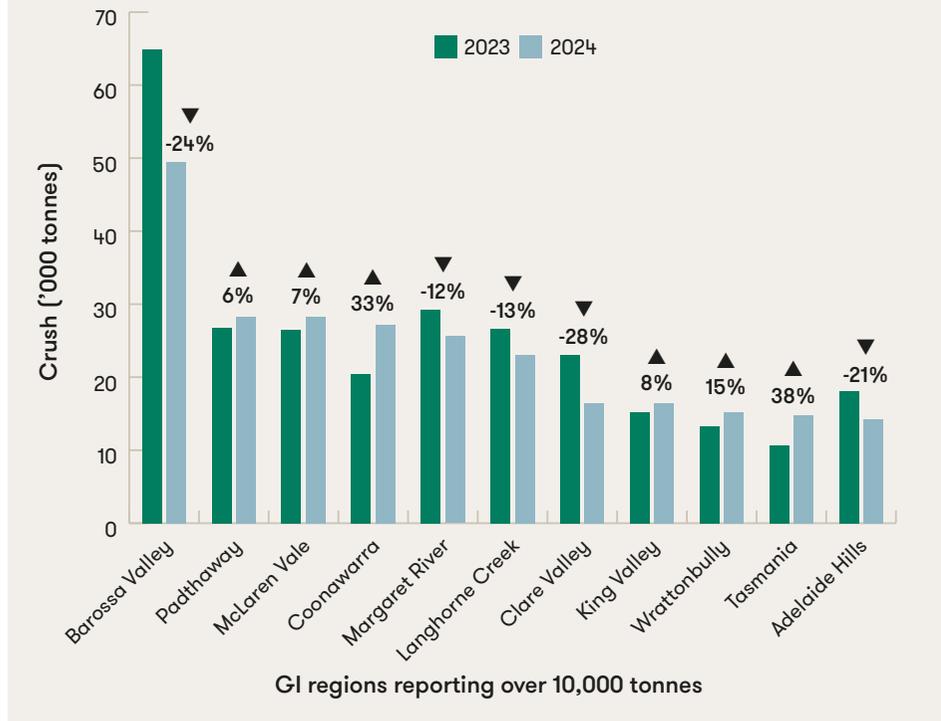
The increase in the inland regions was driven by substantial increases in the crush from Murray Darling – Swan Hill and the Riverina (both of which experienced extremely low vintages in 2023), partly offset by a small decrease in the crush from the Riverland.

Murray Darling – Swan Hill increased by 38 per cent from 205,061 tonnes to 282,338 tonnes, while Riverina increased by 15 per cent from 200,117 tonnes to 230,985 tonnes<sup>8</sup>. Despite the increases, both regions were at least 15 per cent below their 10-year averages.

After recording the lowest crush for 10 years with 410,888 tonnes in 2023, the Riverland saw a further 5 per cent decrease to 391,248 tonnes in 2024 – very similar to the 2013 crush of 396,199 tonnes. Over the past five years (up to 2023), the average crush for the Riverland has been 482,277 tonnes, making this year’s crush 19 per cent below the average.

<sup>8</sup> Figures quoted at the regional level are the collected (reported) figures, not estimated figures (ie not raised by the non-response rate). See the method section for more details.

Figure 10: Crush for largest cool/temperate regions in 2023 vs 2024

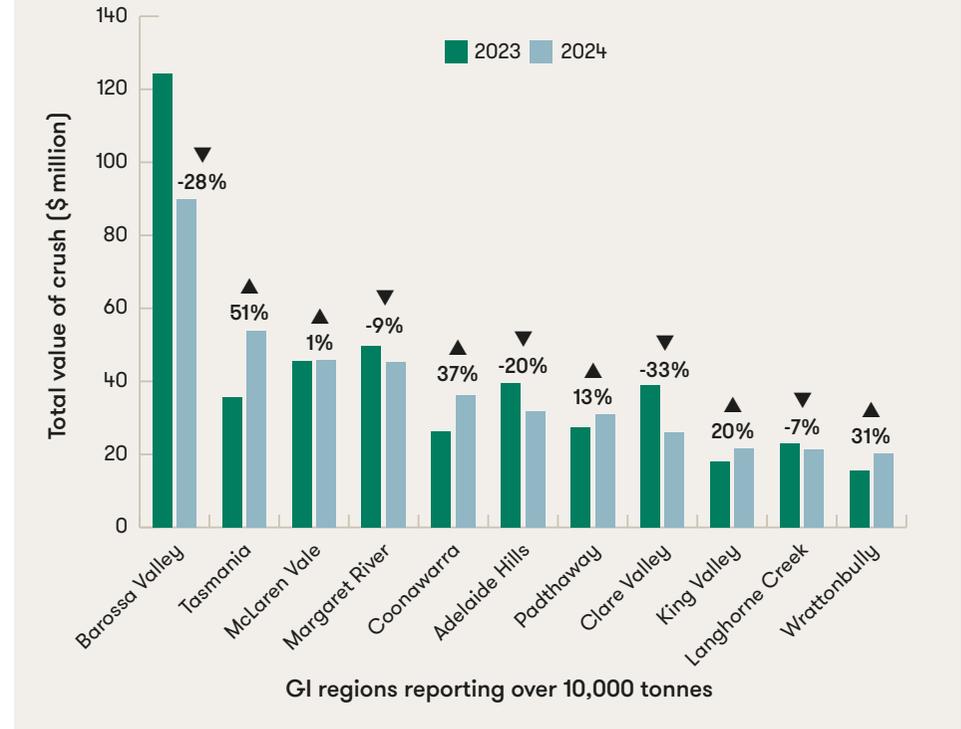


The top 11 regions<sup>9</sup> outside the three large inland regions are shown in Figure 10. These did not change in composition, but there were some changes in the order, with Padthaway, McLaren Vale, Coonawarra, King Valley, Wrattenbully and Tasmania all moving up, while Margaret River, Langhorne Creek, Clare and Adelaide Hills all moved down. Coonawarra (up 33 per cent) and Tasmania (up 38 per cent<sup>10</sup>) had the largest increases in percentage terms, while the Barossa Valley (down 24 per cent) and Adelaide Hills (down 21 per cent) had the largest decreases.

<sup>9</sup> This group comprises all GI regions (outside the large inland regions) reporting over 10,000 tonnes. Note that Tasmania is classified as a GI region as well as a state.

<sup>10</sup> The collected tonnes for Tasmania increased by 38 per cent, but the estimated tonnes increased by 42 per cent, as a result of the 2024 figures being raised by a higher non-response rate than 2023.

Figure 11: Value of crush for largest cool/temperate regions in 2023 vs 2024



When this same group of regions is ranked by value of the crush instead of tonnes, Tasmania moves into second place, Adelaide Hills moves up to sixth and Padthaway drops to seventh (Figure 11).

Details of the crush by state and region can be found in table 5 on page 17.

## Crush value analysis

The estimated value of the crush in 2024 is just over \$1 billion. The value increased by 2 per cent compared with 2023 as a result of the 9 per cent increase in the crush size being partly offset by a decline of 5 per cent in average value.

Red grapes accounted for 56 per cent of the total value, with Shiraz contributing the largest share (23 per cent). Chardonnay was second by value with a 19 per cent share (see Table 3 on page 15).

The value of the crush is determined based on the value of purchased grapes. The winegrape batches reported in the National Vintage Survey are classified as either ‘winery grown’ – i.e. grown by the winery that crushed them, or ‘purchased’ – i.e. bought from an independent third party<sup>11</sup>.

An analysis of the prices paid for purchased grapes enables an estimation to be made of the value of the grapes at a region–variety level, which in turn can be aggregated to a regional or national level. Winery grown grapes are assigned the same value as purchased grapes of the same region–variety combination.

In 2024, there were 16,718 separate batches of purchased grapes reported in the National Vintage Survey by 436 different respondents, comprising a total of 859,896 tonnes with a value of just over \$527 million.

There were 275 respondents who did not purchase any grapes, making up 39 per cent of respondents, but only accounting for 2 per cent of the crush.

The overall average value of the crush in 2024 was \$613 per tonne – a 5 per cent decrease compared with 2023. This decrease was a result of a decrease in the share of tonnes from cool/temperate regions, which have a higher average value (see Table 1).

Table 1: Average value and year-on-year changes for grapes by source and colour

		Average value (\$/tonne)					
		2023	2024	Change in avg. value	Change in tonnes	Share of crush in 2023	Share of crush in 2024
Cool/temperate	Red	1585	1583	0%	-7%	21%	18%
	White	1391	1436	3%	4%	10%	10%
	<b>Total</b>	<b>1523</b>	<b>1531</b>	<b>1%</b>	<b>-3%</b>	<b>31%</b>	<b>28%</b>
Warm inland	Red	304	290	-5%	3%	33%	31%
	White	399	379	-5%	24%	36%	41%
	<b>Total</b>	<b>357</b>	<b>345</b>	<b>-3%</b>	<b>14%</b>	<b>69%</b>	<b>72%</b>
<b>All regions</b>	<b>Total</b>	<b>642</b>	<b>613</b>	<b>-5%</b>	<b>9%</b>	<b>100%</b>	<b>100%</b>

The average value for cool/temperate whites increased by 3 per cent in 2024 and reached a new record of \$1436 per tonne, 48 per cent higher than in 2015, and 30 per cent above its 10-year average. Reds from cool/temperate regions showed no change in average value despite the crush falling by 7 per cent to its smallest size since 2020.

<sup>11</sup> This could be an independent grapegrower or another winery choosing to sell some grapes from its own vineyards

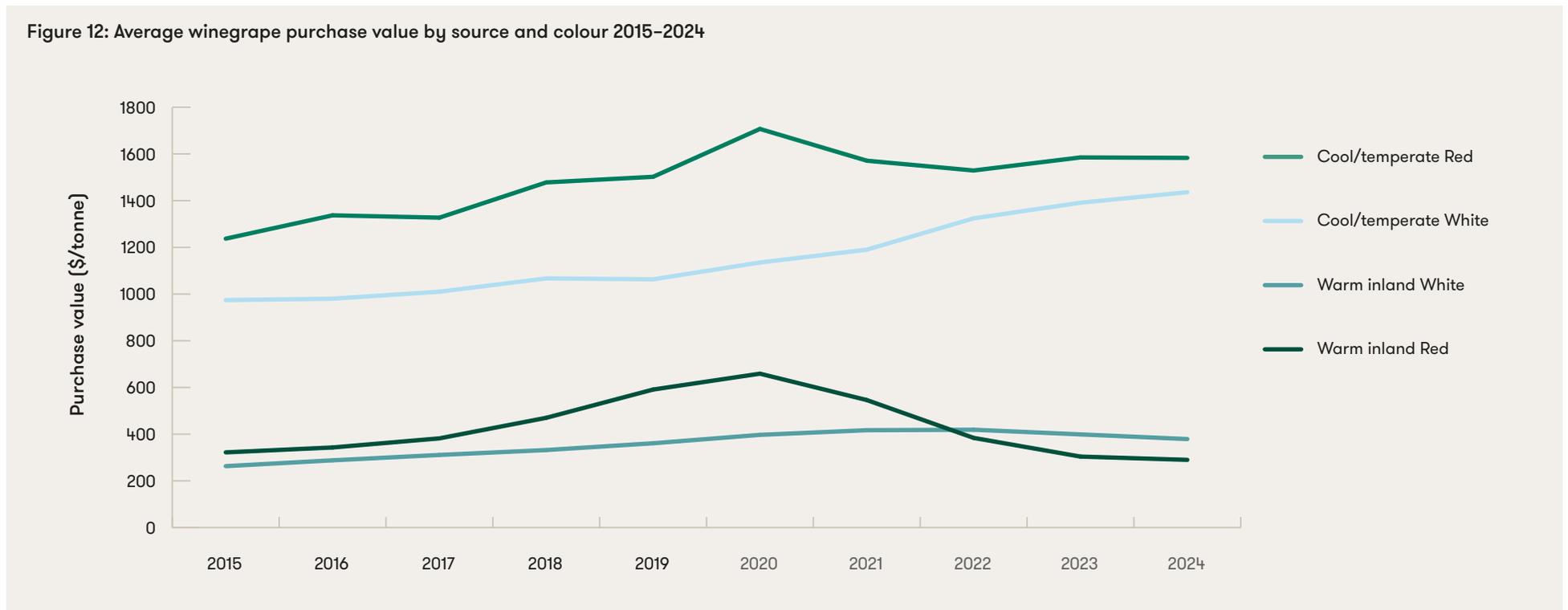
Across the warm inland regions, both reds and whites declined by 5 per cent in average value<sup>12</sup>. Despite the decline, the average value for warm inland whites was still 44 per cent higher than in 2015 and 10 per cent above its 10-year average. Warm inland reds fell to 10 per cent below their 2015 value and 33 per cent below their 10-year average (Figure 12). For the third year in a row, the average value for inland whites was higher than for reds.

The top six varieties in the warm inland regions all declined in average value, with the exception of Merlot, which increased by 1 per cent (Table 2).

Table 2: Average value for warm inland major varieties and year-on-year change

Variety	Average value 2023	Average value 2024	Change in average value
Cabernet Sauvignon	268	241	-10%
Merlot	276	279	1%
Shiraz	279	249	-11%
Chardonnay	378	372	-2%
Pinot Gris/Grigio	515	462	-10%
Sauvignon Blanc	536	496	-7%

Figure 12: Average winegrape purchase value by source and colour 2015–2024



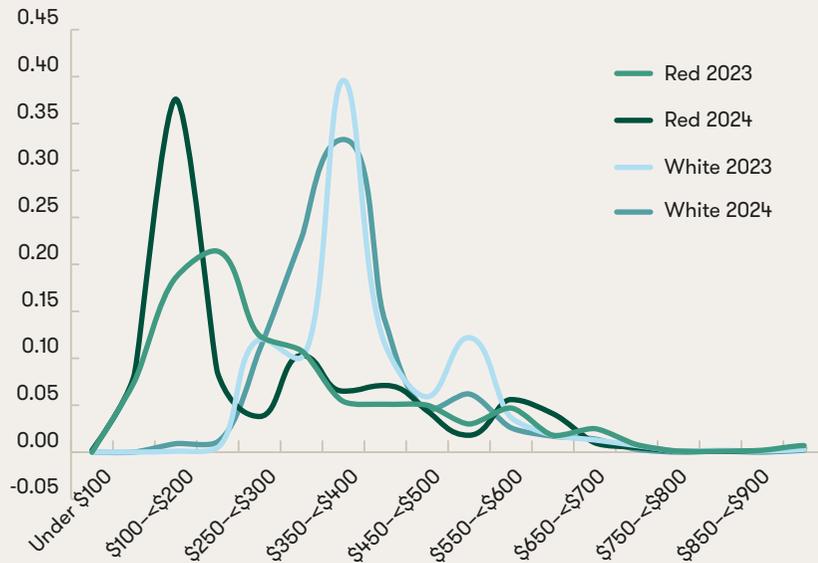
<sup>12</sup> The overall change was a 3 per cent reduction because of the increased share of (higher-valued) white varieties in the colour mix.

## Price dispersion

The range (dispersion) of prices paid can be determined from an analysis of the batch data. Each individual batch is assigned to a price segment and the amount and share purchased in each segment is calculated.

The main change in price dispersion for the warm inland regions in 2024 was an increase in the percentage of red grapes purchased at <\$200 per tonne (up from 26 per cent to 46 per cent) and a corresponding decrease in the percentage purchased at between \$200–\$300 from 34 per cent to 12 per cent (Figure 13). This means that nearly half of all warm inland grapes were purchased at below \$200 per tonne in 2024.

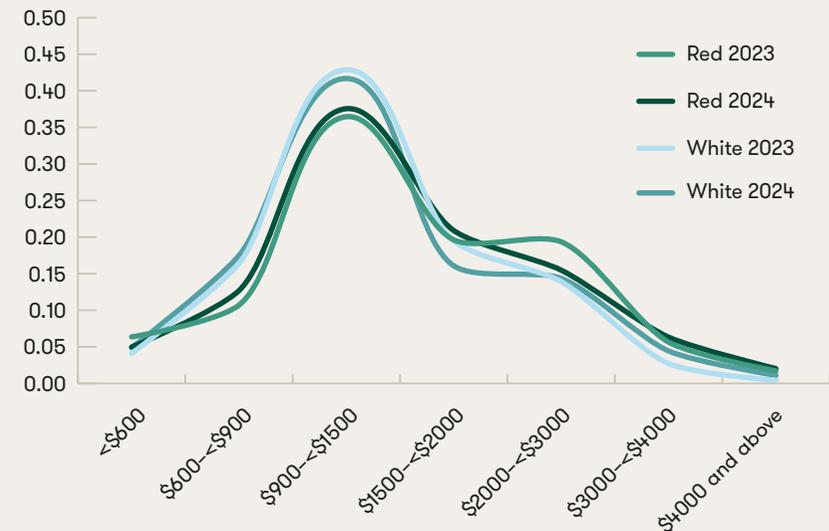
Figure 13: Price dispersion for warm inland red and white purchased grapes 2023 vs 2024



The chart shows clearly the difference in prices paid for red and white varieties, which has reversed since 2021.

There was very little change in the price dispersion for the cool/temperate purchased grapes, except for a slight increase in the share of whites purchased at >\$2000 per tonne and a similar decrease in the share of reds purchased in this segment. The dispersion for reds and whites is very similar, which indicates the convergence in value for reds and whites across these regions in the past two years (Figure 14).

Figure 14: Price dispersion for cool/temperate purchased grapes 2023 vs 2024



## Crush by winery size

In 2024, there were 711 respondents to the National Vintage Survey, an increase of 90 respondents (14 per cent) compared with 2023 and eclipsing the previous record of 628 respondents in 2022. There were a further 81 who reported a zero crush for the 2024 vintage, making an overall 40 per cent response rate out of 1962<sup>13</sup> eligible businesses who received the survey invitation.

Overall, a total of 1,258,485 tonnes were reported to the survey. It is estimated that the tonnes reported accounted for 88 per cent of the total Australian winegrape crush in 2024, compared with 91 per cent in 2023.

The largest 20 wineries<sup>14</sup> all responded to the 2024 survey. Together they accounted for 75 per cent of the estimated crush.

Respondents were classified into size categories based on their crush. There were 20 respondents from the largest size category (>10,000 tonnes), accounting for 3 per cent of respondents and 85 per cent of the reported crush, while there were 453 respondents from the smallest size category (<100 tonnes), accounting for 64 per cent of the responses and 1 per cent of the crush (Figure 15).

The increase in response rate came almost entirely from the smallest size group, which increased by 25 per cent in number. This is believed to be largely attributable to the introduction of an easy online option for reporting crush figures.

Smaller increases in respondent numbers from the 100-500 category and the >10,000 category were offset by a decrease in respondents from the 500-10,000 category (Figure 16). This explains why the share of the estimated crush decreased despite the increase in number of respondents. The average crush per respondent was 1,770 tonnes in 2024, compared with 1,923 tonnes in 2023 and 2,503 tonnes in 2022.

Wine Australia would like to acknowledge and thank the wine businesses that took the time to respond to the survey. The contribution of all wineries is very important to the accuracy of the report in providing a picture of the distribution, value and changes in the crush by variety in Australia.

<sup>13</sup> Of the 2027 businesses initially sent a survey, 65 reported that they do not crush grapes or were no longer in business.

<sup>14</sup> Based on previous survey responses

Figure 15: Share of reported crush by winery size category

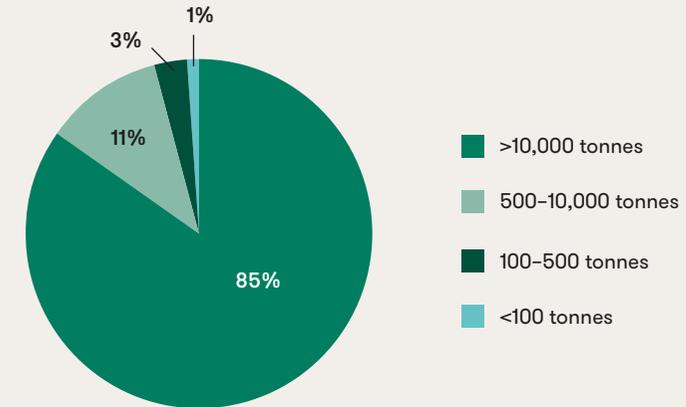


Figure 16: Respondents to the National Vintage Survey by crush size in 2023 and 2024

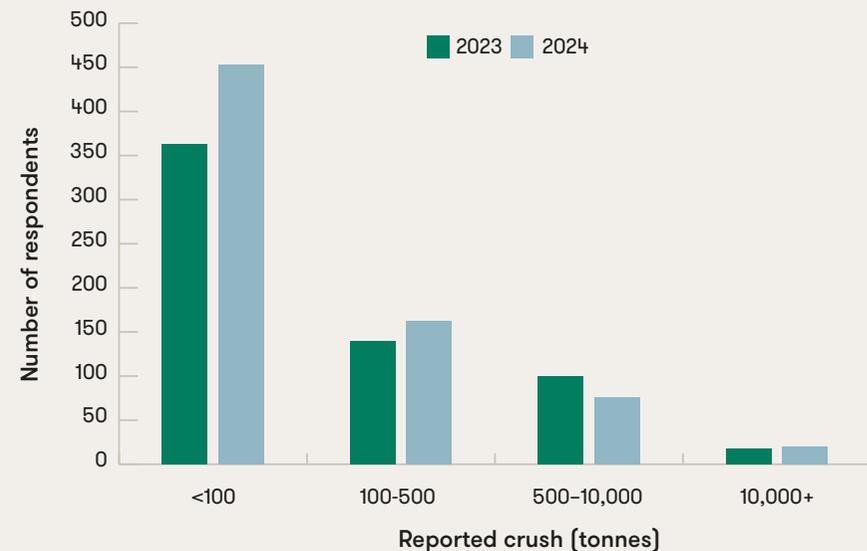


Table 3: Estimated tonnes, share of total crush and value by variety 2024

Varieties	Estimated tonnes	Per cent change in tonnes	Share of national crush	Est total value ALL grapes
<b>Red</b>				
Barbera	416	117%	0%	464,788
Cabernet Franc	769	23%	0%	1,242,249
Cabernet Sauvignon	153,644	2%	11%	113,870,110
Durif	13,166	5%	1%	5,207,272
Graciano	405	115%	0%	581,496
Grenache	16,209	19%	1%	23,178,158
Lagrein	79	-28%	0%	86,373
Malbec	8,120	-0%	1%	7,708,217
Mataro/Mourvedre	6,516	15%	0%	8,567,658
Merlot	75,560	13%	5%	31,625,563
Montepulciano	1,167	52%	0%	1,085,238
Muscat à Petits Grains Rouges	1,167	-15%	0%	1,053,186
Nebbiolo	342	21%	0%	933,917
Nero d'Avola	930	38%	0%	881,279
Other red	45,130	36%	3%	22,085,064
Petit Verdot	16,566	3%	1%	4,008,531
Pinot Meunier	717	16%	0%	1,817,191
Pinot Noir	48,814	23%	3%	90,345,854
Ruby Cabernet	7,404	59%	1%	2,242,783
Sangiovese	5,906	15%	0%	6,235,852
Shiraz	297,868	-14%	21%	234,178,798
Tempranillo	3,937	16%	0%	4,755,747
Touriga Nacional	658	43%	0%	682,258
<b>Red Total</b>	<b>705,489</b>	<b>-1%</b>	<b>49%</b>	<b>562,837,582</b>

Varieties	Estimated tonnes	Per cent change in tonnes	Share of national crush	Est total value ALL grapes
<b>White</b>				
Chardonnay	332,643	31%	23%	195,379,885
Chenin blanc	3,204	-11%	0%	2,527,047
Colombard	48,302	23%	3%	14,219,389
Fiano	2,625	91%	0%	2,416,937
Gewürztraminer	6,779	-3%	0%	2,696,516
Grüner Veltliner	261	-17%	0%	456,579
Marsanne	737	10%	0%	716,473
Muscat à Petits Grains Blancs	13,519	17%	1%	4,560,463
Muscat Gordo Blanco	45,701	10%	3%	14,373,100
Other white	12,215	39%	1%	7,436,577
Pinot Gris/Grigio	70,757	27%	5%	52,591,523
Prosecco	17,437	22%	1%	16,453,758
Riesling	22,128	8%	2%	30,440,397
Roussanne	492	63%	0%	385,118
Sauvignon Blanc	89,120	4%	6%	67,807,062
Semillon	44,101	-10%	3%	22,478,131
Verdelho	5,694	18%	0%	3,260,551
Vermentino	1,486	-4%	0%	1,186,572
Viognier	4,317	-7%	0%	3,219,792
<b>White Total</b>	<b>721,519</b>	<b>19%</b>	<b>51%</b>	<b>442,605,871</b>
<b>Grand Total</b>	<b>1,427,008</b>	<b>9%</b>	<b>100%</b>	<b>1,005,443,453</b>

**Table 4: Varieties outside the top 10 reds and whites reported in the National Vintage Survey 2024**

These varieties were outside the top 10 for each colour but reported individually in the regional summary tables.

Reds	Whites
Barbera	Chenin blanc
Cabernet Franc	Fiano
Graciano	Grüner Veltliner
Lagrein	Marsanne
Montepulciano	Roussanne
Muscat à Petits Grains Rouges	Verdelho
Nebbiolo	Vermentino
Nero d'Avola	Viognier
Pinot Meunier	
Sangiovese	
Tempranillo	
Touriga Nacional	

Varieties grouped as 'other' in regional intake summary reports but which have at least three wineries reporting them in total<sup>14</sup>.

Other reds	Other whites
Aglianico	Albarino
Alicante Bouschet	Arinto
Blaufrankisch	Arneis
Carignan	Canada Muscat
Carmenère	Clairette
Chambourcin	Crouchen
Cinsaut	Falanghina
Colorino	Garganega
Counoise	Greco
Dolcetto	Grenache Blanc
Gamay	Grenache Gris
Isabella	Gros Manseng
Lambrusco Maestri	Inzolia
Mencia	Malvasia Istriana
Mondeuse	Moscato Giallo
Muscat Hamburg	Muscadelle
Negroamaro	Orange Muscat
Rubired	Palomino
Sagrantino	Pecorino
Saperavi	Pedro Ximenez
Souzao	Picpoul
Tannat	Pinot blanc
Teroldego	Savagnin
Tinta Amarela	Trebbiano
Tinta Barroca	Verdejo
Tinta Cão	Verdicchio Bianco
Tinta Negra Mole	Verduzzo

14. There are a further 30 red and 22 white varieties reported by at least one winery in 2024 – including some that are not identified by name. These are not identified, to protect the confidentiality of the respondents.

Table 5: Crush by state and region 2024 (collected tonnes)

State and region	Tonnes purchased	Tonnes own grown	Total tonnes	Share winery grown	Share of national crush	# respondents
<b>New South Wales</b>	<b>270,887</b>	<b>97,719</b>	<b>368,606</b>	<b>27%</b>	<b>29%</b>	<b>142</b>
Big Rivers zone other	1,212	-	1,212	0%	0%	2
Canberra District	45	313	358	87%	0%	11
Central Ranges zone other	206	345	551	63%	0%	7
Cowra	562	-	562	0%	0%	4
Gundagai	5,682	45	5,727	1%	0%	11
Hastings River	-	28	28	100%	0%	2
Hilltops	367	57	424	13%	0%	22
Hunter	1,510	2,210	3,720	59%	0%	51
Mudgee	578	1,160	1,739	67%	0%	23
Murray Darling - Swan Hill NSW	49,946	69,067	119,013	58%	9%	18
New England Australia	-	3	3	100%	0%	1
Orange	607	2,425	3,031	80%	0%	32
Perricoota	763	-	763	0%	0%	4
Riverina	209,009	21,976	230,985	10%	18%	18
Shoalhaven Coast	3	27	30	91%	0%	3
South Coast zone other	-	5	5	100%	0%	1
Southern Highlands	4	46	49	93%	0%	3
Tumbarumba	392	13	405	3%	0%	17
<b>Queensland</b>	<b>54</b>	<b>634</b>	<b>688</b>	<b>92%</b>	<b>0%</b>	<b>20</b>
Granite Belt	47	540	587	92%	0%	15
Queensland zone other	-	66	66	100%	0%	2
South Burnett	6	29	35	82%	0%	4
<b>South Australia</b>	<b>425,205</b>	<b>194,195</b>	<b>619,400</b>	<b>31%</b>	<b>49%</b>	<b>278</b>
Adelaide Hills	9,601	4,674	14,275	33%	1%	81
Adelaide Plains	1,560	38	1,598	2%	0%	11
Barossa Valley	28,998	20,453	49,451	41%	4%	94
Barossa zone other	62	633	694	91%	0%	8
Clare Valley	8,226	8,272	16,498	50%	1%	45

Table 5: Crush by state and region 2024 (collected tonnes) (continued)

State and region	Tonnes purchased	Tonnes own grown	Total tonnes	Share winery grown	Share of national crush	# respondents
Coonawarra	6,898	20,245	27,143	75%	2%	36
Currency Creek	2,717	798	3,515	23%	0%	8
Eden Valley	3,267	3,469	6,736	51%	1%	46
Fleurieu zone other	696	-	696	0%	0%	8
Kangaroo Island	-	127	127	100%	0%	4
Langhorne Creek	17,847	5,255	23,102	23%	2%	47
Limestone Coast zone other	2,884	225	3,109	7%	0%	11
Lower Murray zone other	2,405	88	2,493	4%	0%	9
McLaren Vale	17,682	10,560	28,242	37%	2%	98
Mount Benson	836	1,310	2,147	61%	0%	8
Mount Gambier	732	26	758	3%	0%	12
Mount Lofty Ranges zone other	475	28	503	6%	0%	7
Padthaway	22,506	5,776	28,282	20%	2%	17
Riverland	287,075	104,173	391,248	27%	31%	47
Robe	165	2,803	2,969	94%	0%	5
Southern Fleurieu	158	21	179	12%	0%	7
Southern Flinders Ranges	151	1	152	1%	0%	3
The Peninsulas	162	55	217	25%	0%	5
Wrattonbully	10,103	5,166	15,268	34%	1%	20
<b>Tasmania</b>	<b>4,596</b>	<b>10,133</b>	<b>14,729</b>	<b>69%</b>	<b>1%</b>	<b>14</b>
Tasmania	4,596	10,133	14,729	69%	1%	14
<b>Victoria</b>	<b>141,377</b>	<b>77,428</b>	<b>218,805</b>	<b>35%</b>	<b>17%</b>	<b>235</b>
Alpine Valleys	1,837	77	1,913	4%	0%	17
Beechworth	183	296	478	62%	0%	12
Bendigo	970	153	1,123	14%	0%	16
Central Victoria zone other	340	2,201	2,540	87%	0%	4
Geelong	103	1,093	1,196	91%	0%	16
Gippsland	1	371	372	100%	0%	11
Glenrowan	-	834	834	100%	0%	1

Table 5: Crush by state and region 2024 (collected tonnes) (continued)

State and region	Tonnes purchased	Tonnes own grown	Total tonnes	Share winery grown	Share of national crush	# respondents
Goulburn Valley	3,602	2,024	5,626	36%	0%	16
Grampians	479	730	1,208	60%	0%	12
Heathcote	5,116	1,496	6,613	23%	1%	49
Henty	34	261	294	88%	0%	4
King Valley	7,129	9,275	16,404	57%	1%	33
Macedon Ranges	57	262	319	82%	0%	25
Mornington Peninsula	326	1,317	1,643	80%	0%	39
Murray Darling - Swan Hill VIC	114,763	48,561	163,325	30%	13%	34
North East Victoria zone other	496	114	610	19%	0%	5
North West Victoria zone other	59	221	280	79%	0%	3
Port Phillip zone other	-	11	11	100%	0%	2
Pyrenees	138	481	619	78%	0%	17
Rutherglen	395	2,369	2,764	86%	0%	16
Strathbogie Ranges	292	10	302	3%	0%	3
Sunbury	3	100	103	97%	0%	3
Upper Goulburn	942	217	1,160	19%	0%	9
Western Victoria zone other	79	18	97	18%	0%	4
Yarra Valley	4,034	4,936	8,971	55%	1%	46
<b>Western Australia</b>	<b>17,777</b>	<b>18,480</b>	<b>36,257</b>	<b>51%</b>	<b>3%</b>	<b>116</b>
Blackwood Valley	812	83	896	9%	0%	7
Eastern Plains, Inland and North of WA	-	2	2	100%	0%	1
Geographe	967	679	1,646	41%	0%	23
Great Southern	2,297	2,025	4,322	47%	0%	26
Manjimup	10	1	11	12%	0%	2
Margaret River	12,862	12,731	25,593	50%	2%	75
Peel	-	2	2	100%	0%	1
Pemberton	600	1,098	1,698	65%	0%	16
Perth Hills	33	37	70	52%	0%	7
Swan District	196	1,822	2,017	90%	0%	21
<b>Grand Total</b>	<b>859,896</b>	<b>398,589</b>	<b>1,258,485</b>	<b>32%</b>	<b>100%</b>	<b>711</b>

# Method

The National Vintage Survey is a single annual crush and price survey conducted by Wine Australia on behalf of the Australian wine sector. This report has been prepared by Wine Australia based on an analysis of survey results.

Wine grapes levy payers (approximately 2,000 businesses) are sent a request for crush data in late April. Wine Tasmania conducts the survey in Tasmania in collaboration with Wine Australia to ensure alignment of results and to minimise survey load on wineries.

Respondents are asked to provide individual transaction data by variety and region for grape purchases and a summary of their own (winery) grown fruit by variety and region. This enables accurate reporting of crush (production) and price dispersion data by variety and GI region as well as at a national and state level.

In 2024, responses were received from 711 businesses<sup>15</sup>, including all wineries known to have crushed over 10,000 tonnes. This represented a response rate of 40 per cent of eligible entities that received a survey invitation. The reported (collected) tonnage is estimated to account for 88 per cent of all winegrapes crushed in 2024.

## Calculating the national crush estimate

At a national level, the data collected has been scaled up to provide an estimate of the actual crush by variety (including non-collected tonnes).

The actual crush figure for each vintage is taken to be the figure provided by the Department of Agriculture Fisheries and Forestry (DAFF) levies unit, which collects levies based on crush and is the most accurate crush figure available. This figure is updated as levy returns are received and is not finalised until at least 12-18 months after the vintage it refers to. Therefore, Wine Australia prepares an early estimate of the crush for the wine sector based on the survey results.

The crush estimate is based on calculating the ratio of tonnes collected in the survey in the current year to the tonnes collected from the same respondents in

<sup>15</sup> Plus a further 81 that reported crushing zero tonnes in 2024

the previous year<sup>16</sup>. This is assumed to be representative of the overall change in crush volume between the two years, although it can be affected by other factors including changes of ownership and business decisions around use of fruit.

This change in crush is applied to the final DAFF figure<sup>17</sup> for the previous vintage to provide an estimate for the current vintage.

## 2024 estimated crush calculation

Change in crush from respondents who responded in both 2023 and 2024	8.5%
DAFF figure for 2023	1,314,618 tonnes
<b>Calculation: <math>1,314,618 \times (1 + 0.085) = 1,427,008</math></b>	
Wine Australia estimated crush for 2024	1,427,008 tonnes

## Reconciliation of crush estimate in 2023

Wine Australia estimate in 2023 survey	1,317,098 tonnes (June 2023)
DAFF figure for 2023	1,314,618 tonnes (as at June 2024)

The Wine Australia estimate for the 2023 crush was within 2,500 tonnes (less than 1 per cent) of the DAFF figure for levy returns from the 2023 vintage, as at June 2024.

It should be noted that the 2023 figures reported in this 2024 report will vary slightly from what was reported last year, as they have been adjusted based on using the updated DAFF recorded figure for 2023 and incorporating late responses and data corrections.

<sup>16</sup> The tonnage collected from this group is 99% of the total collected crush in 2024 and 87 per cent of the estimated crush

<sup>17</sup> In fact, the DAFF figure can continue to change for many months as late returns are received. The latest available figure is used in this calculation, which is from June 2024.

## Notes on the calculation of average value and valuation of own grown fruit

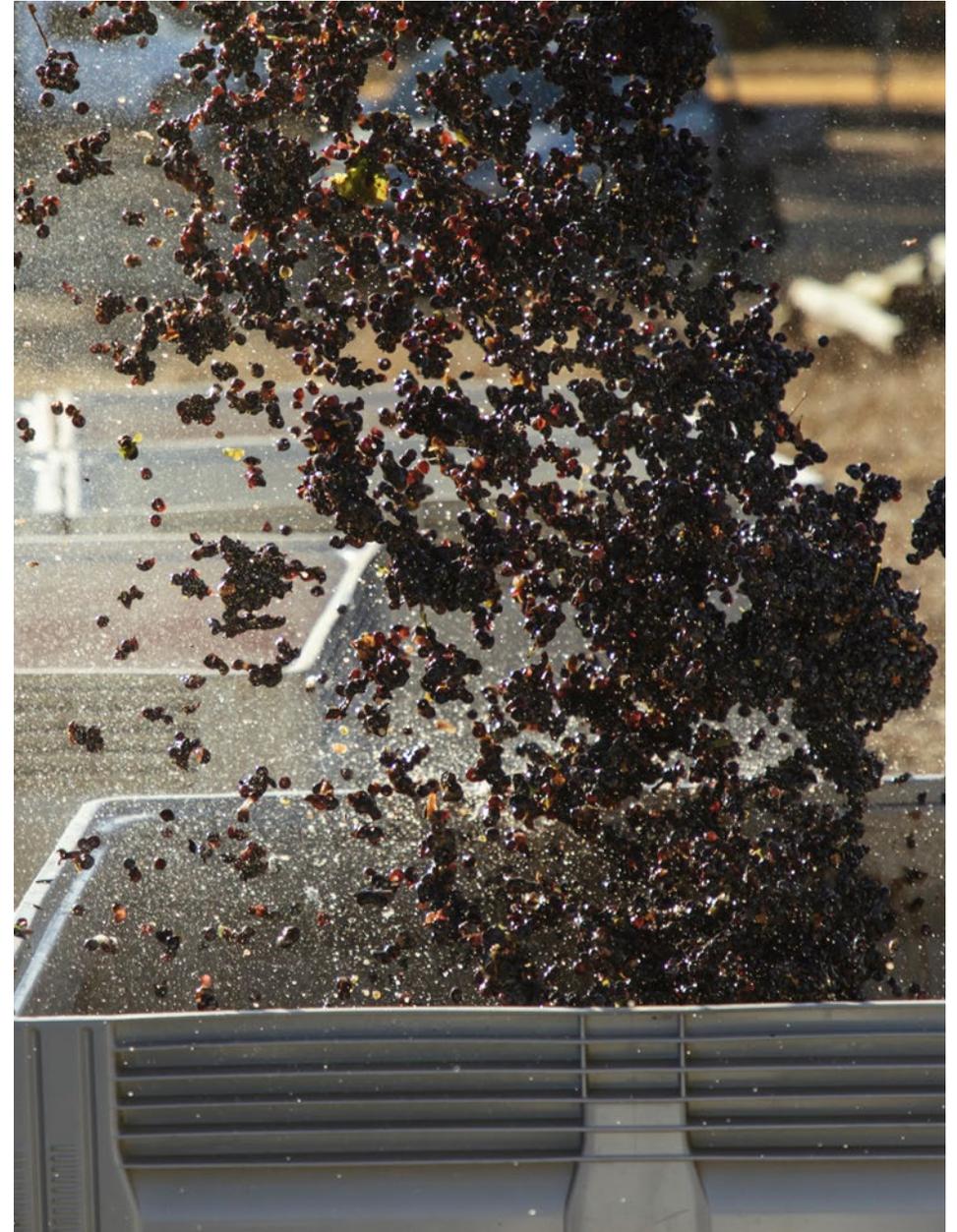
The average value is calculated at the variety/region level by dividing the total amount paid for all purchased grapes of that variety/region by the tonnes for which purchase value is provided.

Where tonnes purchased have been reported without a price attached, these tonnes are not included in the calculation of the average price for that variety.

The value of own grown fruit is estimated using the same calculated average purchase value as applies for purchased fruit of that variety in that region. Where there are no purchases of a particular variety, the average for that variety across all similar regions is used to estimate the value, or – if that is not available – then the average for red or white in the same region is used. It should be noted that this figure is an estimate only as own grown fruit, by definition, does not have a commercial purchase value.

Where there are fewer than three wineries reporting a purchase of a particular variety, the total purchase value and average price are not displayed in the regional intake summary reports to protect confidentiality. However, the calculated value is included in the total purchase value for red and white varieties overall.

Please direct any questions on this report's method and data to Manager, Market Insights Peter Bailey at Wine Australia [peter.bailey@wineaustralia.com](mailto:peter.bailey@wineaustralia.com)



# Wine Australia

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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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## About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), growing domestic and international markets, and protecting the reputation of Australian wine.

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 R&I investments.