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**Wine Producers’ Committee**

**Vintage 2021: Industry Snapshot**

WOWA Executive Summary

The Wine Producers’ Committee has been operating for five years, providing the WA wine industry with sufficient funding to support industry development across the value chain. The WoWA Board and Regional Committees set annual priorities to be addressed by fee for service funding using the 2014—24 WA Wine Industry Strategic Plan and Regional strategic plans as guiding documents.

Allocation of resources to achieve Strategic priorities is an all of industry task. It is important to be engaged with your Regional committee, WoWA and the APC Wine Producers Committee. Industry input is key to getting this right.

In the 2021 -22 financial year, state level priories were: supporting Regional Associations with funding and resources; providing management and governance for the Export Growth Partnership with state government; providing management and governance for the federally funded Regional Program (R&D extension) and; advocacy and representation on behalf industry to the state and federal governments. Further detail on above will be available in the WoWA 2021-22 Annual Report. Please also refer to Annual Reports from previous years [here](https://winewa.asn.au/annual-reports/).

One of the valuable assets provided by the APC collection is very accurate production data, by region and variety. We now have a very clear picture of the production structure of the state which producers can use in conjunction with market demand data to make decisions on varietal mix and where to source fruit. From a whole of industry perspective, the data is useful in determining which markets are best targeted when combined with wine style preferences and average price point.

We know that WA is a premium wine producing state. Our average price per litre in export markets compared to most other states confirm this. This positioning has been created through investment in best practise across the value chain. To further lift our market position will require a bigger investment in an ever more competitive domestic and international market. The APC Wine Producers’ Committee is committed to ensuring funding is appropriately allocated to achieve this.

Vintage 2021

At 54,000 tonnes, the 2021 vintage was closer to the annual average since 2016 of 60,000 tonnes.The previous two years were affected by weather events prior to or during vintage that resulted in reduced volume particularly in the Great Southern and Blackwood Valley. Additionally, rising global demand for aromatic white varieties and Chardonnay has resulted in increased production, a trend that is continuing in 2022. Red varieties were similarly in short supply, in part because of lower volumes in 2019 and 2020 and because of increased demand internationally (noting the impact of China tariffs had not taken effect in 2021). Demand trends in 2022 for key red varieties remain stable through increasing growth in the US which has off-set a decline in sales to China. To the end of June 2022, sales volume and value into the US for Cabernet and to a lesser extent Shiraz have increased significantly (97% and 24% respectively).

The 2021 vintage will hopefully be the point at which sustainable industry growth began with demand firming and producers increasing vineyard area in response to accurate market signals.

* The production for the 2021 vintage was 17.7% higher than the prior year [2021: 54,116 tonnes; 2020: 45,968 tonnes], with total production also performing favorably against the four-year average [average: 52,767 tonnes].
* Driving this improvement was a 22.9% increase in reported white variety production and an 11% increase in reported red variety production.
* The highest overall growth rates in production for the 2021 vintage was in the Peel (75%), Great Southern (50%), Southern Forests (33%), and Blackwood (30%) regions.
* The greatest increases by volume came from Great Southern (4,071 tonnes) and Margaret River (2,850 tonnes) regions.
* The only region to have reported lower than the prior year was the Perth Hills region, with a decline of 15% (60 tonnes).

# **State Varietal Trends: Snapshot**

## **Whites**

* Of the major white varieties, most performed consistently with the overall trend with sauvignon blanc 35% higher than the prior vintage [2021: 10,203 tonnes; 2020: 7,552 tonnes], chardonnay 21% higher than the prior vintage [2021: 8,442 tonnes; 2020: 6,979 tonnes] and Semillon 18% higher than the prior vintage [2021: 7,025 tonnes; 2020: 5,946 tonnes].
* Of the lesser produced varieties, there was substantial growth in trebbiano (124%), gruner veltliner (110%), gewürztraminer (106%), verdejo (89%) and prosecco (87%).
* The largest drop in production was in the less common varieties of savignin blanc (-63%), pedro ximenez (-40%) and arneis (-24%).

## **Reds**

* Of the major red varieties, most performed consistently with the overall trend with cabernet sauvignon 10% higher than the prior vintage [2021: 9,221 tonnes; 2020: 8,397 tonnes], Shiraz 10% higher than the prior vintage [2021: 8,382 tonnes; 2020: 7,592 tonnes] and Merlot 12% higher than the prior vintage [2021: 1,814 tonnes; 2020: 1,617 tonnes].
* Of the lesser produced varieties, sangiovese (+61%), grenache (+46%), barbera (+141%) and pinot meunier (+250%) all outperformed the overall trend.
* There were few red varieties with decreased production volumes. Of those, the largest drop in production was in the less common varieties of cabernet franc (-19%) and durif (-6%).

# **State Varietal Trends: Data**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Red Variety | Vintage 2018 | Vintage 2019 | Vintage 2020 | Vintage 2021 |
| CABERNET SAUVIGNON | 10755.1 | 8930.4 | 8397.3 | 9220.6 |
| SHIRAZ | 10414.9 | 7748.0 | 7591.6 | 8381.7 |
| MERLOT | 2710.3 | 2123.9 | 1616.9 | 1814.4 |
| PINOT NOIR | 812.2 | 621.2 | 695.4 | 910.8 |
| MALBEC | 839.9 | 515.9 | 507.6 | 572.5 |
| TEMPRANILLO | 487.0 | 303.4 | 409.6 | 484.5 |
| GRENACHE | 279.9 | 424.1 | 317.2 | 462.9 |
| OTHER | 164.9 | 109.6 | 253.4 | 197.4 |
| CABERNET FRANC | 232.8 | 150.7 | 212.5 | 171.2 |
| PETIT VERDOT | 230.8 | 167.5 | 149.4 | 143.1 |
| SANGIOVESE | 67.1 | 48.0 | 52.7 | 84.8 |
| ZINFANDEL | 62.8 | 49.4 | 47.6 | 48.2 |
| MOUVEDRE | 57.0 | 23.0 | 41.6 | 42.7 |
| NEBBIOLO | 34.1 | 27.0 | 26.7 | 34.4 |
| BARBERA | 14.3 | 11.3 | 9.7 | 23.5 |
| DURIF | 20.6 | 14.0 | 16.4 | 15.5 |
| GRACIANO | 3.7 | 9.9 | 9.4 | 11.5 |
| PINOT MEUNIER | 0.8 | 1.8 | 3.0 | 10.6 |
| NERO D'AVOLA | 6.0 | 8.7 | 8.3 | 9.1 |
| GAMAY | 1.9 | 3.8 | 3.9 | 8.8 |
| DOLCETTO | 3.6 | 3.7 | 4.5 | 4.3 |
| MONTEPULCIANO | 0.4 | 0.5 | 0.5 | 2.8 |
| SAPERAVI | 1.9 | 1.8 | 1.9 | 2.4 |
| LAGREIN | 1.4 |  |  |  |
| CHAMBOURCIN |  |  |  |  |
| BRACHETTO | 1.0 | 1.6 | 1.2 | 2.3 |
| TANNAT | 5.8 | 1.0 | 1.0 | 2.2 |
| MEUNIER | 0.7 | 0.6 | 0.2 | 1.4 |
| AGLIANICONE |  |  | 0.1 | 0.7 |
| RED (TOTAL) | **27210.9** | **21300.9** | **20379.8** | **22664.1** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| White Variety | Vintage 2018 | Vintage 2019 | Vintage 2020 | Vintage 2021 |
| SAUVIGNON BLANC | 10926.29 | 8997 | 7552.3517 | 10203.2 |
| CHARDONNAY | 8910.54 | 8014 | 6979.344 | 8442.3 |
| SEMILLON | 8880.30 | 6194 | 5946.925 | 7025.2 |
| CHENIN BLANC | 2304.96 | 2186 | 2132.926 | 2156.1 |
| RIESLING | 1350.63 | 1102 | 889.77 | 1398.1 |
| VERDELHO | 799.22 | 705 | 603.211 | 645.7 |
| PINOT GRIS | 159.61 | 237 | 321.302 | 469.4 |
| MUSCADELLE | 189.97 | 179 | 199.721 | 181.7 |
| SAVIGNIN BLANC | 370.41 | 354 | 450.334 | 164.8 |
| OTHER | 213.57 | 235 | 83.603 | 161.4 |
| VIOGNIER | 126.24 | 82 | 88.593 | 119.8 |
| PROSECCO | 14.89 | 14 | 55.532 | 103.9 |
| VERMINTINO | 76.21 | 61 | 55.426 | 101.6 |
| GEWURTZTRAMINER | 51.61 | 18 | 40.228 | 83.1 |
| MUSCAT BLANC A PETITS GRAINS | 47.43 | 111 | 98.318 | 80.5 |
| FIANO | 43.15 | 28 | 36.565 | 50.6 |
| VERDEJO | 29.86 | 29 | 9.06 | 17.1 |
| ARNEIS | 12.99 | 15 | 19.444 | 14.9 |
| GRUNER VELTLINER |  | 2 | 5.718 | 12.0 |
| TREBBIANO | 4.00 | 5 | 4.118 | 9.2 |
| PEDRO XIMENEZ | 14.31 | 8 | 7.573 | 4.6 |
| SCHEUREBE | 6.42 | 4 | 3.605 | 3.1 |
| ROUSSANNE | 1.37 | 1 | 1.349 | 2.0 |
| TRAMINER | 8.40 |  | 2.14 | 2.0 |
| HARSLEVELU |  |  | 1 |  |
|  |  |  |  |  |
|  |  |  |  |  |
| WHITE (TOTAL) | 34,542.37 | 28,581.41 | 25,588.16 | 31,452.14 |

# **WA Industry Profile**

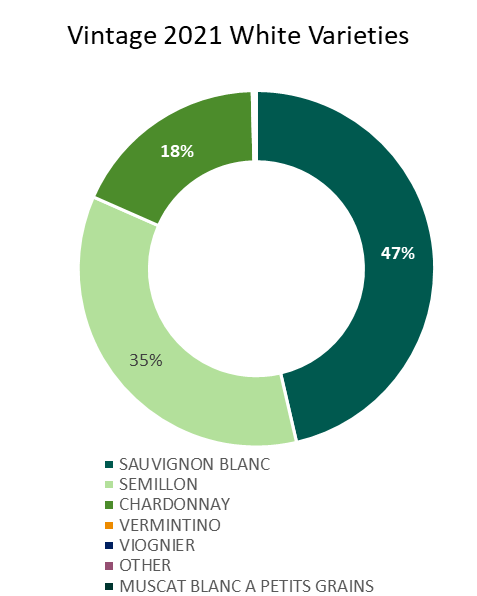
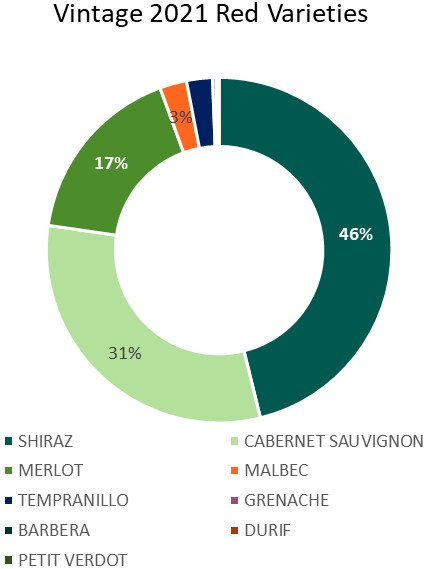
* There were 315 producers who paid FFS for the 2021 vintage, a slight increase on the prior year [2020: 312].
* 54% of producers report volumes of less than 30 tonnes, with the highest number of producers reporting in the 11-29 tonne range.
* The industry profile has remained somewhat consistent over the last four years, with a reducing number of producers in the 2 – 5 tonne range being offset by increases in the 5 - 10 tonne range.

Regional Snapshots

## **Blackwood Region**

Blackwood region saw a 30% (286 tonnes) increase over the 2020 vintage, with a three-year high of 1,226 tonnes.

The growth was predominately in white varieties, which accounted for 242 of the 286-tonne increase.



\*Excl. varieties providing <1% total production

\*Excl. varieties providing <1% total production

At 367 tonnes, sauvignon blanc remains the highest produced variety for the region, followed by Semillon (279 tonnes), shiraz (201 tonnes) and chardonnay (142 tonnes).

The growth in white varieties for the Blackwood region was visible across all varieties, with the strongest growth coming from semillon (+123 tonnes), chardonnay (+59 tonnes) and sauvignon blanc (+57 tonnes).

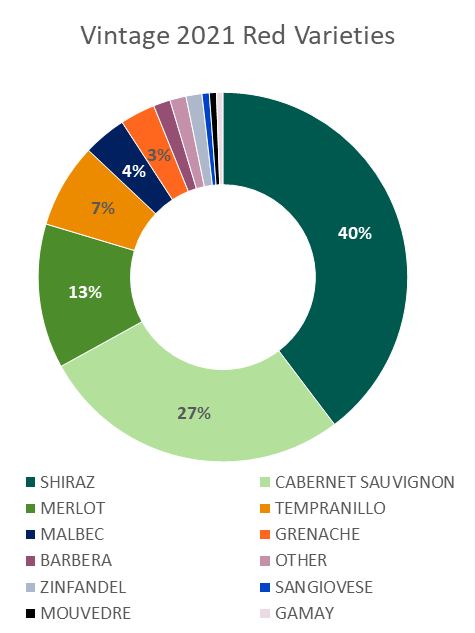
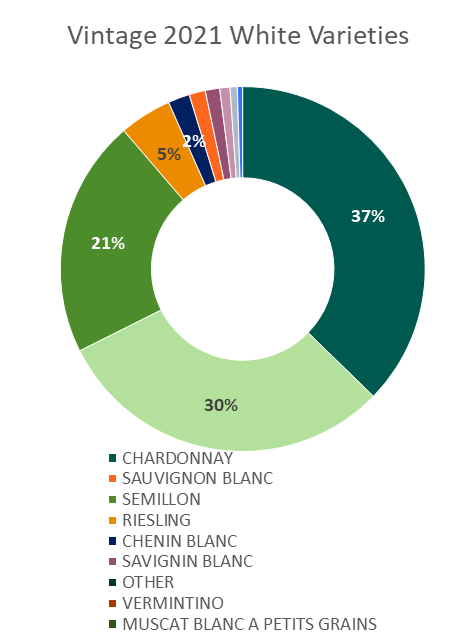
Despite the strong production against the 2020 vintage for cabernet sauvignon and merlot, there was easing of some red varieties, with shiraz dropping from 210 tonnes to 201 tonnes, and malbec dropping from 15 tonnes to 11 tonnes.

## **Geographe Region**

The 2021 vintage had improved production against 2020 overall [2021: 2,495 tonnes; 2020: 2,416 tonnes], with a three-year high in production.

The growth was driven by white varieties, with an overall easing of red production by 2.6% (-37 tonnes).

Geographe continues to be one of the more diverse regions, with vintage 2021 production spanning 21 red varieties and 15 white varieties.



\*Excl. varieties providing <1% total production

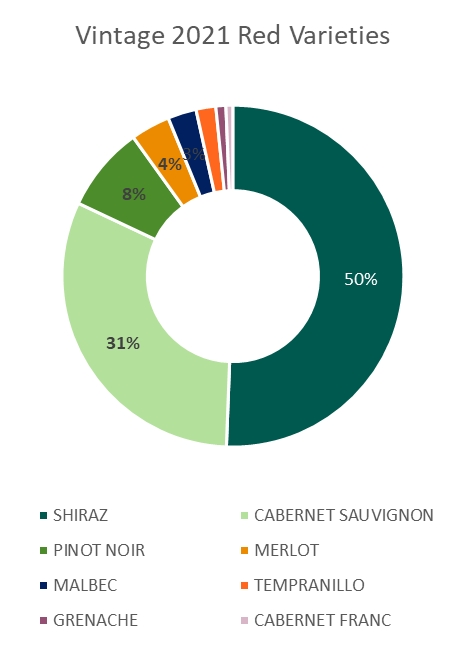
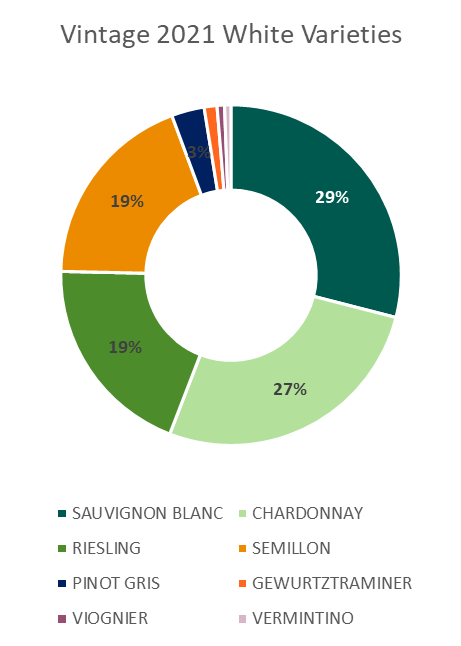
\*Excl. varieties providing <1% total production

* Whilst shiraz accounts for the highest volume of red varieties at 551 tonnes (39% of total red production) there was a dramatic decline in shiraz for vintage 2021 of 140 tonnes (-20.2%). Similarly, tempranillo saw a decrease of 20.3%, down 26 tonnes from the prior year.
* By contrast cabernet sauvignon and merlot production saw increases of 24.3% and 39.1% respectively.
* Chardonnay [2021: 399 tonnes, 2020 347 tonnes], sauvignon blanc [2021: 324 tonnes, 2020 301 tonnes], and Riesling [2021: 50 tonnes, 2020: 23 tonnes], offset reductions in Semillon [2021: 226 tonnes, 2020: 246 tonnes], to drive a 12% growth in white production.

## **Great Southern Region**

The 2021 vintage demonstrated substantial growth for the Great Southern region, with a reported 12,269 tonnes of produce – a 50% increase on 2020 (8,198 tonnes) and stronger than the 2018 high of 11,834 tonnes.

There was substantial growth in red [2021: 6,498 tonnes; 2020: 4,754 tonnes] and white varieties [2021: 5,771 tonnes; 2020: 3,444 tonnes].



\*Excl. varieties providing <1% total production

\*Excl. varieties providing <1% total production

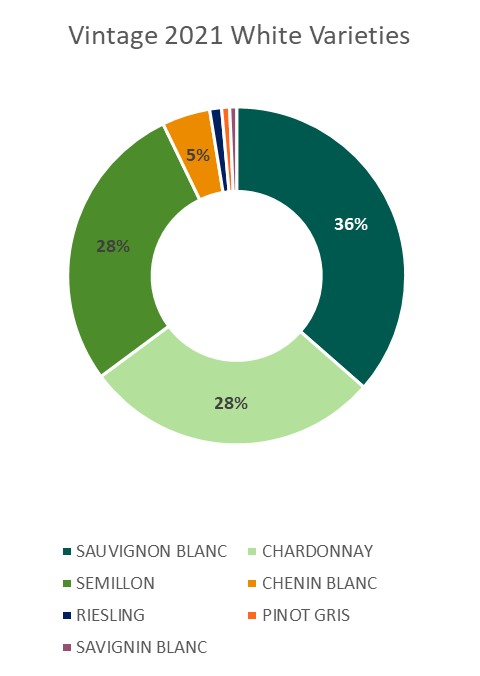
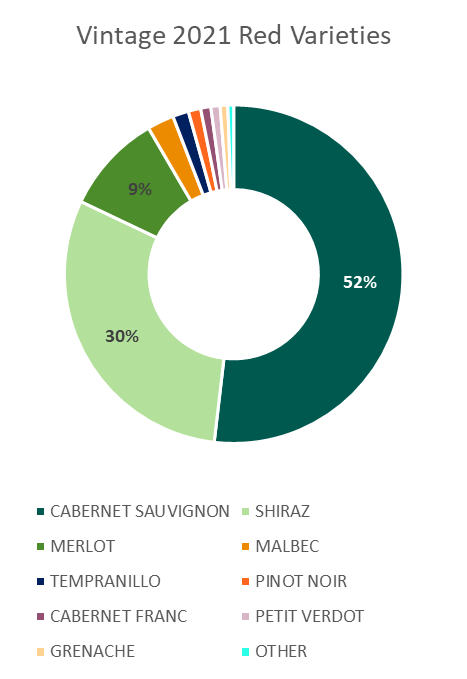
* Shiraz (3,239 tonnes) and cabernet sauvignon (2,010 tonnes) accounted for 81% of total reported red production. Both varieties performed strongly, with 2021 increases of 24% and 55% respectively.
* Of the less common red varieties, there was substantial growth in pinot noir, merlot, malbec and tempranillo.
* It was a similar case in white varieties, with substantial growth across Sauvignon blanc [2021: 1,657 tonnes, 2020: 999 tonnes], chardonnay [2021: 1,535 tonnes, 2020: 841 tonnes], riesling [2021: 1,114 tonnes, 2020: 756 tonnes]and Semillon [2021: 1,086 tonnes, 2020: 630 tonnes].
* Of the less common white varieties, pinot gris and gewürztraminer saw the strongest growth, with an additional 61 tonnes and 44 tonnes respectively.

## **Margaret River Region**

Whilst vintage 2021 recovered against the prior year [2021: 31,652; 2020: 28,802], total volumes remained under the four-year average of 32,454 tonnes.

The growth against the prior year was driven predominately by strong production numbers for white varieties, with an overall increase of 15% in whites.

Whilst there was an overall increase in reds of a modest 2.5%, the results for each red variety was highly variable.



\*Excl. varieties providing <1% total production

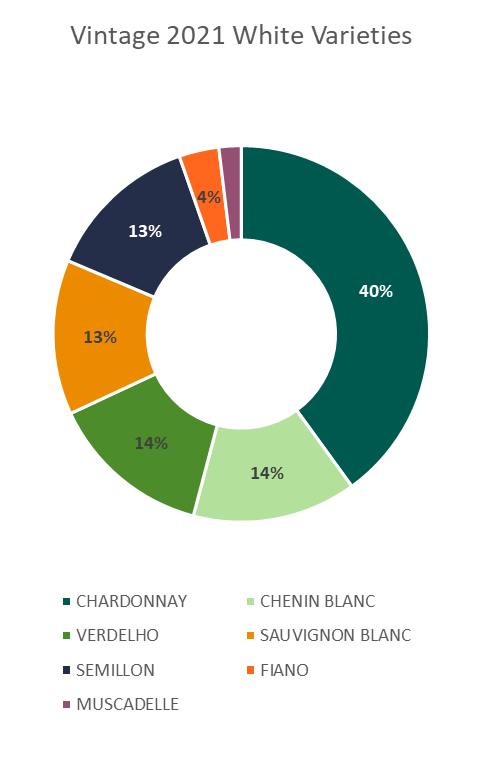
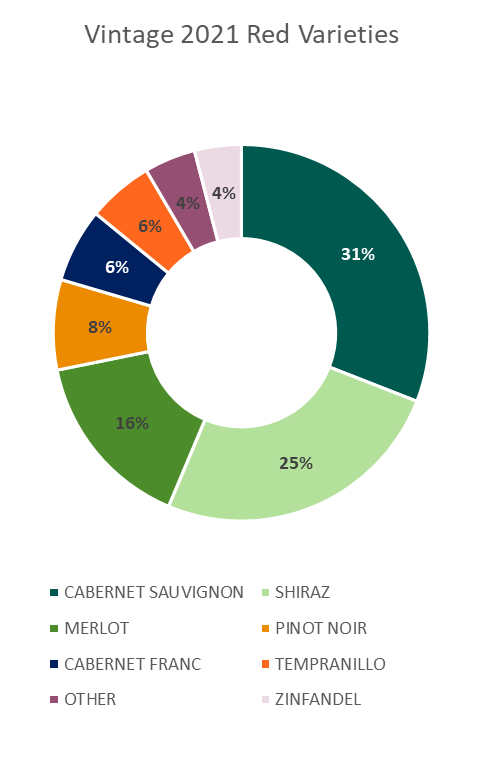
\*Excl. varieties providing <1% total production

* Cabernet Sauvignon and shiraz remained the most common red varieties, however the 2021 vintage saw a substantial drop in shiraz [2021: 3,739 tonnes; 2020: 4,231 tonnes] compared to the gains in cabernet sauvignon [2021: 6,414 tonnes; 2020: 5,619 tonnes]
* Vintage 2021 saw tempranillo overtake cabernet franc in production volume, with 189 tonnes reported (2020: 152 tonnes)
* Sauvignon blanc, chardonnay and Semillon account for 91% of overall white production. Across these three varieties, a total increase of 2,648 tonnes, together with other minor gains including riesling (+108 tonnes) offset losses in savignin blanc (-271 tonnes) and Verdelho (-15 tonnes) for a total net increase in white varieties of 2,548 tonnes.

## **Peel Region**

Vintage 2021 for the Peel region saw a rebound of volumes against the 2020 vintage [2021: 28 tonnes; 2020: 16 tonnes], which was ahead of the four-year trend of 24 tonnes per annum.

There was growth in both red and white varieties, however whites accounted for 80% of the overall increase.



\*Excl. varieties providing <1% total production

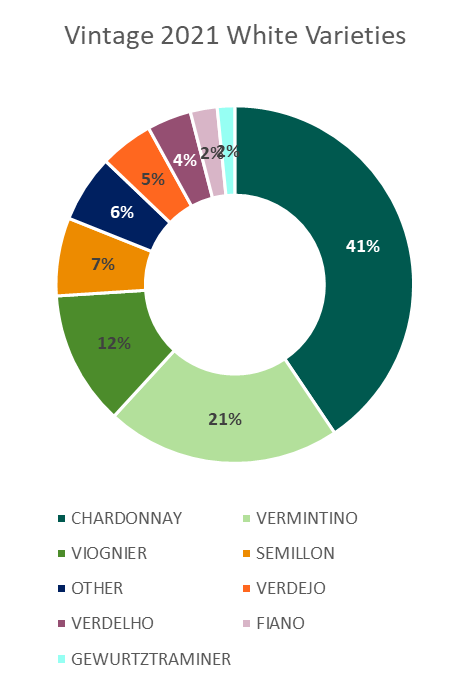
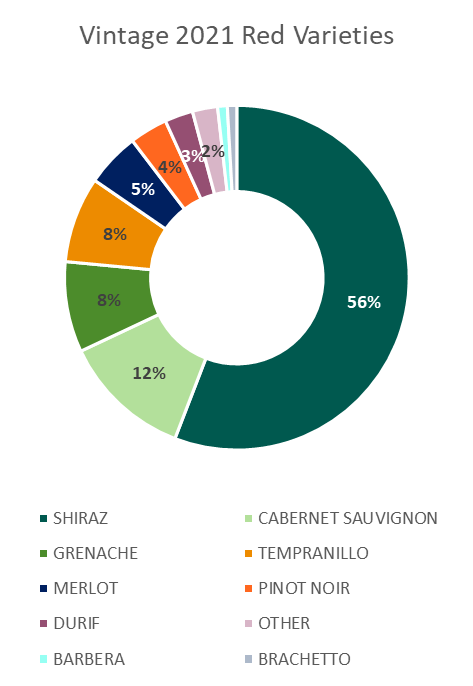
\*Excl. varieties providing <1% total production

* Cabernet sauvignon overtook shiraz as the largest variety of red produced at 4 tonnes (against 3.3 tonnes shiraz). Both varieties were up on the prior year.
* The strongest varietal growth came from chardonnay. It grew from 1.8 tonnes in the 2020 vintage to 6 tonnes in the 2021 vintage to overtake Verdelho as the highest volume white for the Peel region.

## **Perth Hills Region**

Despite being one of the smallest regions by production volume, the Perth Hills remains a diverse region with some 28 different varieties reported.

Perth Hills saw a decline in tonnage for the 2021 vintage against the prior year [2021:330 tonnes; 2020: 390 tonnes] with an underperformance against the four-year average of 340 tonnes.



\*Excl. varieties providing <1% total production

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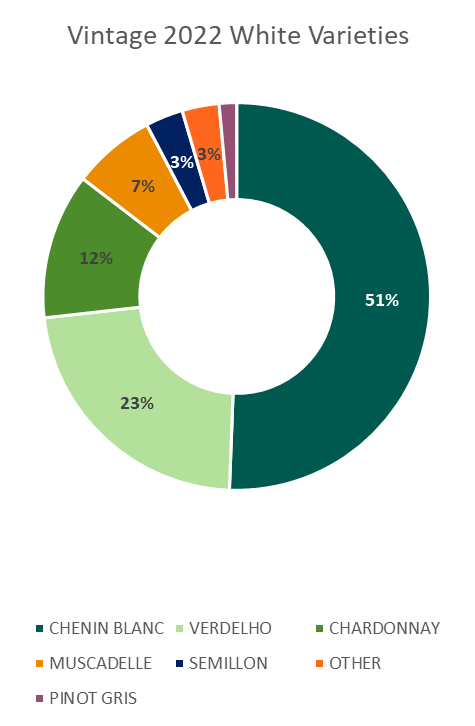
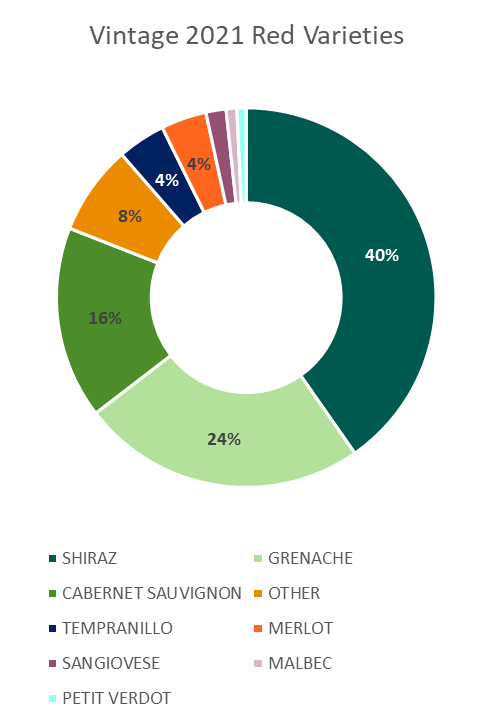
* Despite a moderate increase in tempranillo, shiraz [2021: 140 tonnes; 2020: 158 tonnes], cabernet sauvignon [2021: 30 tonnes; 2020: 32 tonnes] and grenache [2021: 21 tonnes; 2020: 24 tonnes] all saw a softening of production quantity in vintage 2021.
* There was a substantial drop in white production [2021: 68 tonnes; 2020: 106 tonnes] with the largest losses in viognier (-5 tonnes) and Verdelho (-13 tonnes).

## **Swan Valley Region**

The Swan Valley region reported an increase in overall tonnage of 8% for vintage 2021 against the prior year.

Bucking the state-wide trend, majority of the growth was in red varieties (+27%), with an increase from 814 tonnes to 1035 tonnes.

White production remained steady with a moderate increase of 2%, however there were two additional varieties reported for vintage 2021 (prosecco and trebbiano).



\*Excl. varieties providing <1% total production

\*Excl. varieties providing <1% total production

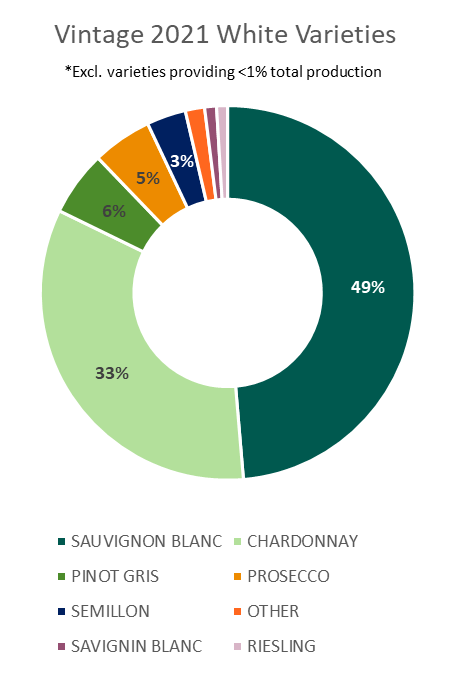
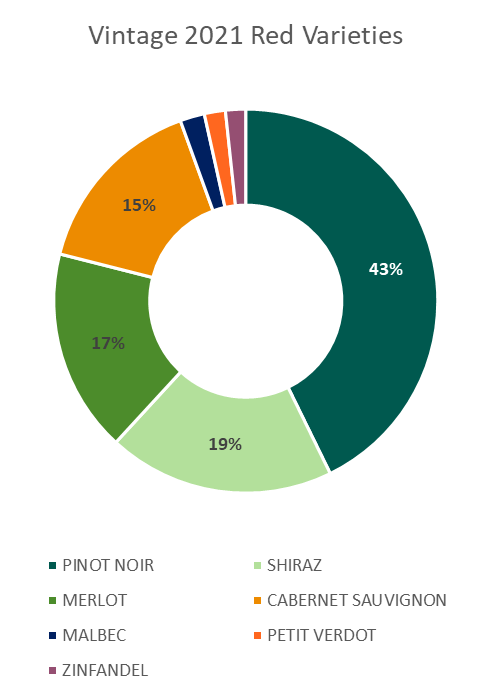
* Shiraz, grenache and cabernet sauvignon collectively accounted for 79% of total red volumes for the 2021 vintage. All three varieties saw an increase over the prior year of 37 tonnes, 71 tonnes and 38 tonnes respectively.
* Other growth in red varieties was also demonstrated for tempranillo and sangiovese.
* Holding steady at 1,256 tonnes for the 2021 vintage, chenin blanc was the largest white variety for the region.
* Verdelho was a strong performer for whites, with an increase of 14% to 562 tonnes.

## **Southern Forests Region**

Vintage 2021 saw a rebound in production figures from 2020 – which was a three-year low.

Despite the strong improvement, overall volumes remained under the four-year average of 2,650 tonnes.

Consistent with state-wide trends, it was a strong year for white production, with a 40% increase from 1,416 tonnes in 2020 to 1,985 tonnes in 2021.



\*Excl. varieties providing <1% total production

* Red production continues to be dominated by pinot noir, with 49 tonnes of the 59 tonnes total red volume growth attributable to the variety.
* Whilst most growth in white varieties came from sauvignon blanc (+243 tonnes), chardonnay (+257 tonnes) and pinot gris (+57 tonnes), prosecco performed ahead of trend with strong growth from 53 tonnes to 101 tonnes.