

Riverland Wine Region



Riverland

Vintage overview

VINTAGE REPORT

The 2025 Riverland vintage was very early compared to previous years, starting as early as the second week in January. This was due to weather conditions producing a mild winter and hotter than average spring. During harvest, higher than average evening temperatures also posed a risk to grape quality and continual irrigation to prevent the degrading of fruit was essential.

The 2025 season saw the Riverland winegrowing region hit hard by a few damaging weather events, from very early in the growing season. Frost saw some of our local vineyards decimated, and others not as severely impacted but still impacted. The region had anywhere between a 50–80 per cent reduction in yields on particular blocks, with the loss of shoots especially affecting the top wire. This resulted in growers making decisions earlier based on crop returns for the season, with many deciding to not produce a 2025 vintage.

White grapes were damaged more extensively than red varieties, due to the timing of the frost. This led to some wineries being unable to meet their fruit requirements, with some reporting up to 20 per cent under their estimated supply. This did lead to a small increase in prices offered to growers.

The Riverland continued post-harvest to receive little to no rain, with a longer and hotter summer into autumn. Growers have irrigated for much longer this season, and we have seen temporary lease prices for water dramatically increase.

Even with these severe weather conditions; harvest of Shiraz especially is surplus to demand. White varieties were under production targets for vintage 2025, with the frost being the main contributing factor to why we did not see the supply requirements met.

Alex Cannon-Leyson, General Manager – Riverland Wine

OVERVIEW OF VINTAGE STATISTICS

After recording the smallest crush in over a decade in 2024 at 391,248 tonnes, even below the 2013 crush of 396,199 tonnes, the Riverland saw a slight increase of 3 per cent to 401,459 tonnes in 2025. Over the past five years (up to 2024), the average crush for the Riverland has been 465,708 tonnes, making this year's crush 14 per cent below the average.

There were 47 respondents to the survey who reported crushing grapes from the Riverland in 2024, the same number as in 2024.

The total value of winegrapes in 2025 was \$125 million, compared with \$119 million in 2024, an increase of 5 per cent. The overall average value increased by 1 per cent from \$312 in 2024 to \$317 per tonne.

All major varieties increased in average value. Cabernet Sauvignon and Merlot both increased by 22 per cent to \$230 per tonne and \$223 per tonne respectively, while Shiraz was up 2 per cent to \$204 per tonne. This resulted in the average value of Cabernet Sauvignon and Merlot being higher than Shiraz for the first time since 2016. Chardonnay was up 11 per cent to \$406 per tonne, Sauvignon Blanc was up 1 per cent to \$547 per tonne, while Pinot Gris/Grigio was up 8 per cent to \$568 per tonne.

The price dispersion showed an upward shift, with 22 per cent of grapes purchased below \$200 per tonne, compared with 32 per cent in 2024.

According to Vinehealth Australia data, the total vineyard area in the Riverland as at 30 April 2025 was 20,286 hectares, a decrease of 40 hectares compared with the previous year and 206 hectares less than it was in 2021.

There were 27 hectares of new plantings (including top-working and replacements) in the 2024–25 season, most of which were Sauvignon Blanc (21 hectares).

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Winegrape intake summary table – reds

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Barbera	5						5	\$945
Cabernet Franc	6						6	\$1,168
Cabernet Sauvignon	51,702	\$11,907,311	\$230	22%	15,595	23%	67,298	\$15,498,879
Durif	1,319	\$434,597	\$330	-9%	0	0%	1,319	\$434,636
Graciano	15						15	\$5,341
Grenache	4,438	\$1,824,814	\$411	-7%	127	3%	4,565	\$1,876,825
Lagrein	19	\$11,047	\$601	0%			19	\$11,047
Malbec	176				381	68%	557	\$184,788
Mataro/Mourvedre	2,158	\$779,218	\$361	-8%	91	4%	2,249	\$812,038
Merlot	16,367	\$3,645,483	\$223	22%	10,063	38%	26,429	\$5,886,806
Montepulciano	218	\$121,038	\$554	2%	58	21%	277	\$153,392
Muscat à Petits Grains								
Rouges	99	\$34,419	\$347	0%			99	\$34,419
Nebbiolo	1						1	\$105
Nero d'Avola	36						36	\$32,634
Petit Verdot	4,313	\$834,104	\$193	8%	3,869	47%	8,182	\$1,582,349
Pinot Meunier	1						1	\$150
Pinot Noir	7,665	\$4,908,569	\$640	-1%	747	9%	8,412	\$5,370,571
Ruby Cabernet	953	\$218,035	\$229	-22%	589	38%	1,541	\$352,783
Sangiovese	223	\$61,021	\$274	0%	516	70%	739	\$202,069
Shiraz	79,961	\$16,308,431	\$204	2%	22,449	22%	102,411	\$20,886,987
Tempranillo	960	\$286,894	\$299	-13%	315	25%	1,275	\$381,093
Touriga Nacional	40	\$14,225	\$359	0%	80	67%	120	\$43,099
Other red	2,997	\$1,305,319	\$435	9%	10,863	78%	13,860	\$5,019,719
Red Total	173,672	\$42,793,345	\$246	4%	65,743	27%	239,415	\$58,771,845

Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

Riverland

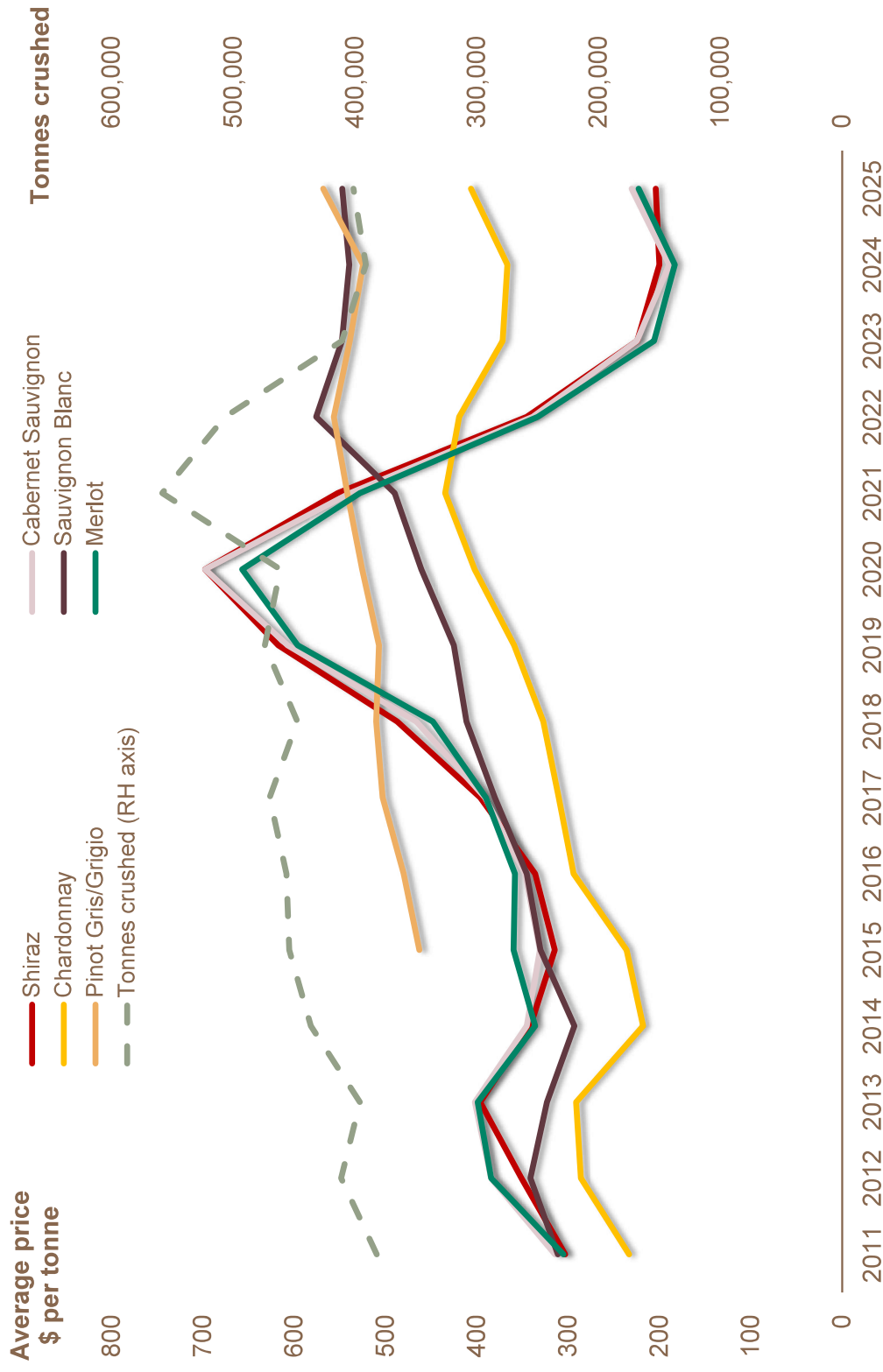
Winegrape intake summary table – whites

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
White								
Chardonnay	65,723	\$26,703,201	\$406	11%	8,810	12%	74,533	\$30,315,147
Chenin Blanc	1,018	\$338,877	\$333	1%			1,018	\$338,877
Colombard	15,461	\$4,241,594	\$274	-2%	2,275	13%	17,736	\$4,865,773
Fiano	186	\$81,522	\$439	0%	87	32%	273	\$119,688
Gewürztraminer	716				830	54%	1,546	\$580,971
Grüner Veltliner					85	100%	85	\$85,140
Muscat à Petits Grains Blancs	641	\$218,807	\$341	6%	337	34%	978	\$333,767
Muscat Gordo Blanco	15,722	\$4,893,417	\$311	4%	2,176	12%	17,899	\$5,570,766
Pinot Gris/Grigio	6,695	\$3,804,460	\$568	8%	1,835	22%	8,530	\$4,847,277
Prosecco	815	\$503,850	\$618	9%			815	\$503,850
Riesling	1,129	\$370,538	\$328	4%	275	20%	1,404	\$460,866
Roussanne	16						16	\$9,251
Sauvignon Blanc	20,188	\$11,049,018	\$547	1%	3,603	15%	23,792	\$13,020,937
Semillon	3,776	\$1,290,336	\$342	1%	3,542	48%	7,319	\$2,500,574
Verdelho	871	\$258,046	\$296	-0%	783	47%	1,654	\$490,053
Vermantino	392	\$190,856	\$487	-9%	212	35%	604	\$294,190
Viognier	1,133	\$563,004	\$497	2%	308	21%	1,441	\$716,247
Other white	2,250	\$722,486	\$321	-3%	152	6%	2,402	\$873,767
White Total	136,733	\$55,508,373	\$406	10%	25,311	16%	162,044	\$65,927,142
Grand Total	310,405	\$98,301,718	\$317	1%	91,054	23%	401,459	\$124,698,986

Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

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Historical weighted average price vs tonnes crushed



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Price dispersion – purchased grapes (red)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000		
Red						
Barbera	5					5
Cabernet Franc	6					6
Cabernet Sauvignon	51,562	141				51,702
Durif	1,228	91				1,319
Graciano	15					15
Grenache	4,428		10			4,438
Lagrein	15		4			19
Malbec	176					176
Mataro/Mourvedre	1,879	279				2,158
Merlot	16,367					16,367
Montepulciano	133	49	37			218
Muscat à Petits Grains Rouges	99					99
Nebbiolo	1					1
Nero d'Avola			36			36
Petit Verdot	4,313					4,313
Pinot Meunier	1					1
Pinot Noir	959	6,673	33			7,665
Ruby Cabernet	953					953
Sangiovese	223					223
Shiraz	78,766	1,071	124			79,961
Tempranillo	936		24			960
Touriga Nacional	33	7				40
Other red	2,598	373	24	2		2,997
Red Total	164,694	8,684	292	2		173,672

Riverland

Price dispersion – purchased grapes (white)

Varieties	Tonnes purchased in each segment					Total purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000		
White						
Chardonnay	64,970	724	29			65,723
Chenin Blanc	1,018					1,018
Colombard	15,461					15,461
Fiano	178		7			186
Gewürztraminer	716					716
Muscat à Petits Grains Blancs	641					641
Muscat Gordo Blanco	15,718	5				15,722
Pinot Gris/Grigio	3,611	3,084				6,695
Prosecco	592	219	4			815
Riesling	1,129					1,129
Roussanne	7	9				16
Sauvignon Blanc	16,957	3,231				20,188
Semillon	3,640	136				3,776
Verdelho	871					871
Vermentino	302	86	4			392
Viognier	915		218			1,133
Other white	2,218		32			2,250
White Total	128,944	7,494	294			136,733
Total purchased	293,638	16,178	587	2		310,405

Riverland

Current plantings by variety and year planted - reds

Variety	Area (hectares)				Total area (Ha)	% planted in 2024
	Pre-2022	2022	2023	2024		
Red Winegrapes						
Barbera	2	0			2	
Cabernet Franc	1				1	
Cabernet Sauvignon	3,233	16	5		3,255	
Durif (Petite Sirah)	49	0	4		53	
Grenache	266	8		0	274	0%
Malbec	24				24	
Mataro (Mourvedre)	203				203	
Merlot	1,194		1		1,195	
Montepulciano	9	0	0		9	
Other Red	70	9			79	
Petit Verdot	458				458	
Pinot Noir	350	14	6		370	
Rubired	43	5	0		49	
Ruby Cabernet	111				111	
Sangiovese	22				22	
Saperavi	2				2	
Shiraz	5,455	26	2	0	5,484	0%
Tempranillo	48	5	0		53	
Touriga	14				14	
Red Winegrapes Total	11,555	83	19	1	11,657	0%

Source:
Vinehealth
Australia

Riverland

Current plantings by variety and year planted – whites and other

Variety	Area (hectares)			Total area (Ha)	% planted in 2024
	Pre-2022	2022	2023	2024	
White Winegrapes					
Chardonnay	4,090	26	5	4	0%
Chenin Blanc	66				
Colombard	673		0		
Doradillo	30				
Fiano	14	0	4		
Muscadelle (Tokay)	4				
Muscat A Petit Grains Blanc (White Frontignac)	98				
Muscat A Petit Grains Rouges (syn Brown Frontignac)	3		0		
Muscat Gordo Blanco	768				
Other White	31	4		0	0%
Palomino	5				
Pedro Ximenez	2				
Pinot Gris	291	5	10	1	
Prosecco	1	8	9		
Riesling	80		1		
Sauvignon Blanc	587	36	22	21	3%
Savagnin	8	3			
Semillon	292	2	1		
Sultana	83				
Traminer (Gewurztraminer)	71				
Trebbiano	12				
Verdelho	80				
Vermantino	16				
Viognier	90		6		
White Winegrapes Total	7,395	84	57	26	0%
Multi-purpose red	57				
Multi-purpose white	62				
Rootstock	26				
Table red	59	60	15	0	0%
Table white	54	31	5		
Unknown variety	697				
Grand Total	19,905	257	96	27	0%

Source:
Vinehealth
Australia

Explanations and definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from Wine Australia.

Total crush

The **total crushed** is the total tonnes of grapes reported to have been crushed from a particular source region, whether processed in that region, another region in SA 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 in 2025 is 92 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, leased or associated vineyards ("own grown") and fruit purchased from other grape producers ("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 specific amounts paid for 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 2025).

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 (price dispersion), differences in quality 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.

Explanations and definitions - continued

PLANTING DATA

Source of planting data tables

Planting data is obtained from the vineyard register maintained by Vinehealth Australia.

Vinehealth Australia is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of vineyard owners in the state. Vineyard owners with plantings of 0.5 hectares or more are required to register with Vinehealth Australia, and provide details of any changes made to these vineyard plantings within three months of any such change. This information is kept strictly confidential and provided for this survey in a deidentified and aggregated manner.

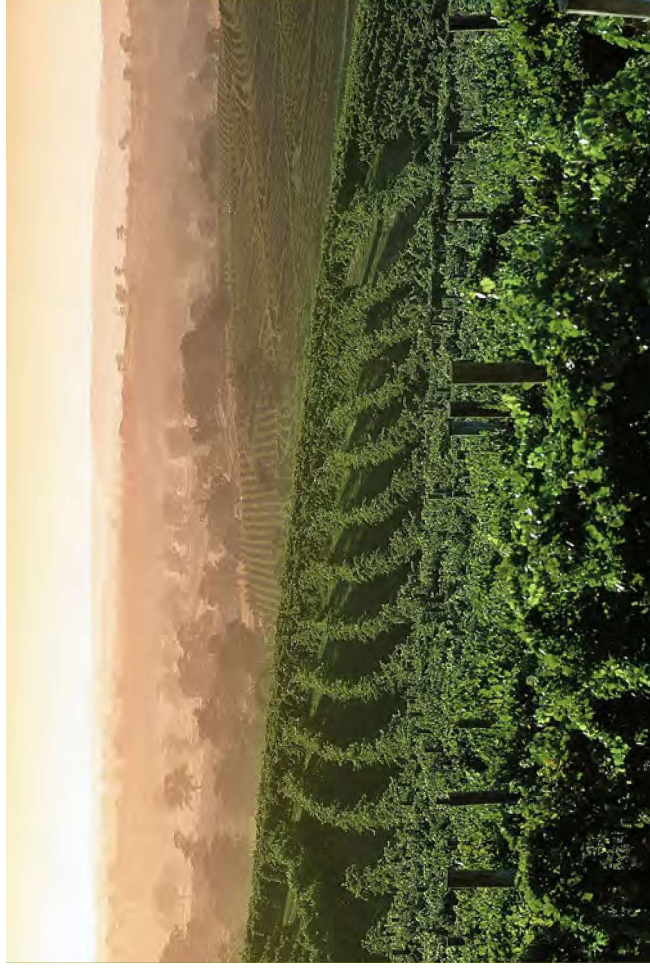
For more information on the planting data in this report or about registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.

Explanatory notes for planting data tables

To protect confidentiality, the following rules are applied to reporting varieties:

- Where there are fewer than 10 registered owners with plantings of a particular variety across the state, that variety is not separately identified in either the state or the regional reports but is grouped with “other red/white”, AND
- Where there are fewer than three registered owners with a particular grape variety in a given region, that variety is not separately identified in the regional report but is grouped with “other red/white” unless it is a white variety listed in the top seven, or red variety in the top five by planted area for the state for the current year.
- Planting data tables are current as at 30 April 2025 and include all plantings from the 2024–25 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.

- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or top-worked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- Zeros (0) in the planting tables indicate a planting of less than 0.5 ha.
- The totals by year planted may not align with the total areas, as new plantings without a year are not captured.
- Rounding of individual variety areas may produce slight discrepancies in total areas in the planting tables.



Acknowledgements

AUSTRALIAN NATIONAL VINTAGE SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian wine sector National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association and Wine Grape Council SA.

The survey publication is available on the Vinehealth Australia website vinehealth.com.au and via links from the Wine Grape Council SA website wgcsa.com.au and the South Australian Wine Industry Association website www.winesa.asn.au.

Survey results from 2015 onwards are available on the Wine Australia interactive Vintage Survey Dashboard: <https://marketexplorer.wineaustralia.com/vintage-survey>

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.

Any questions about the report should be directed to:

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About Wine Australia

Wine Australia supports a competitive wine sector by investing in research and innovation, growing domestic and international markets, 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 research development and adoption investments.

Credits

Image (Eden Valley vineyard) – Wine Australia
GI maps – Vinehealth Australia

