



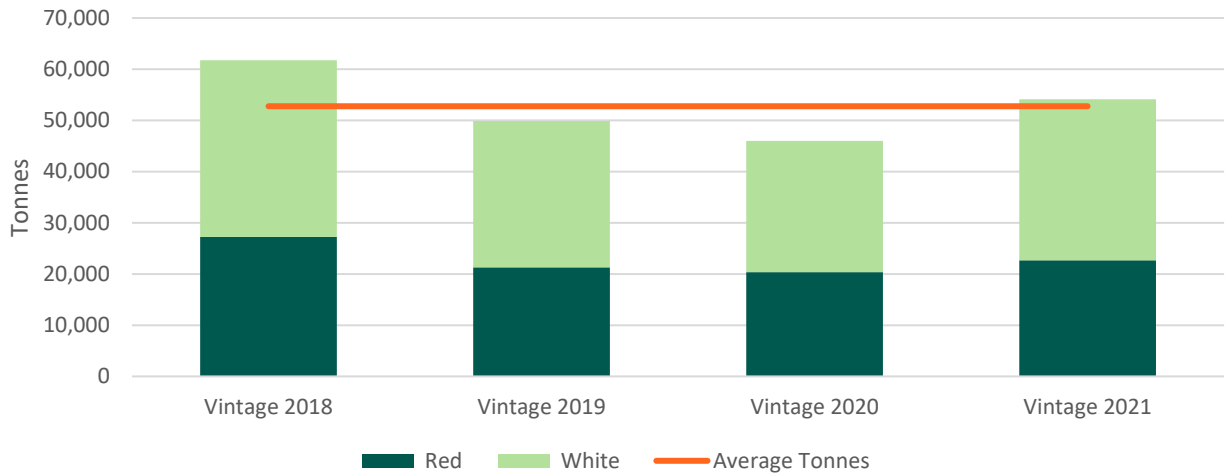
## **Wine Producers' Committee**

### **Annual Snapshot**

Vintage 2021

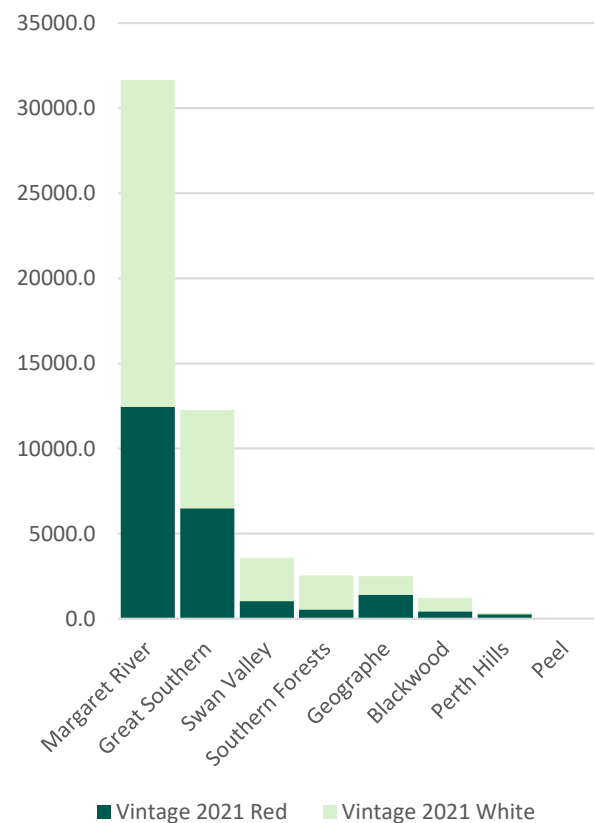
# Vintage 2021

Total Reported Production



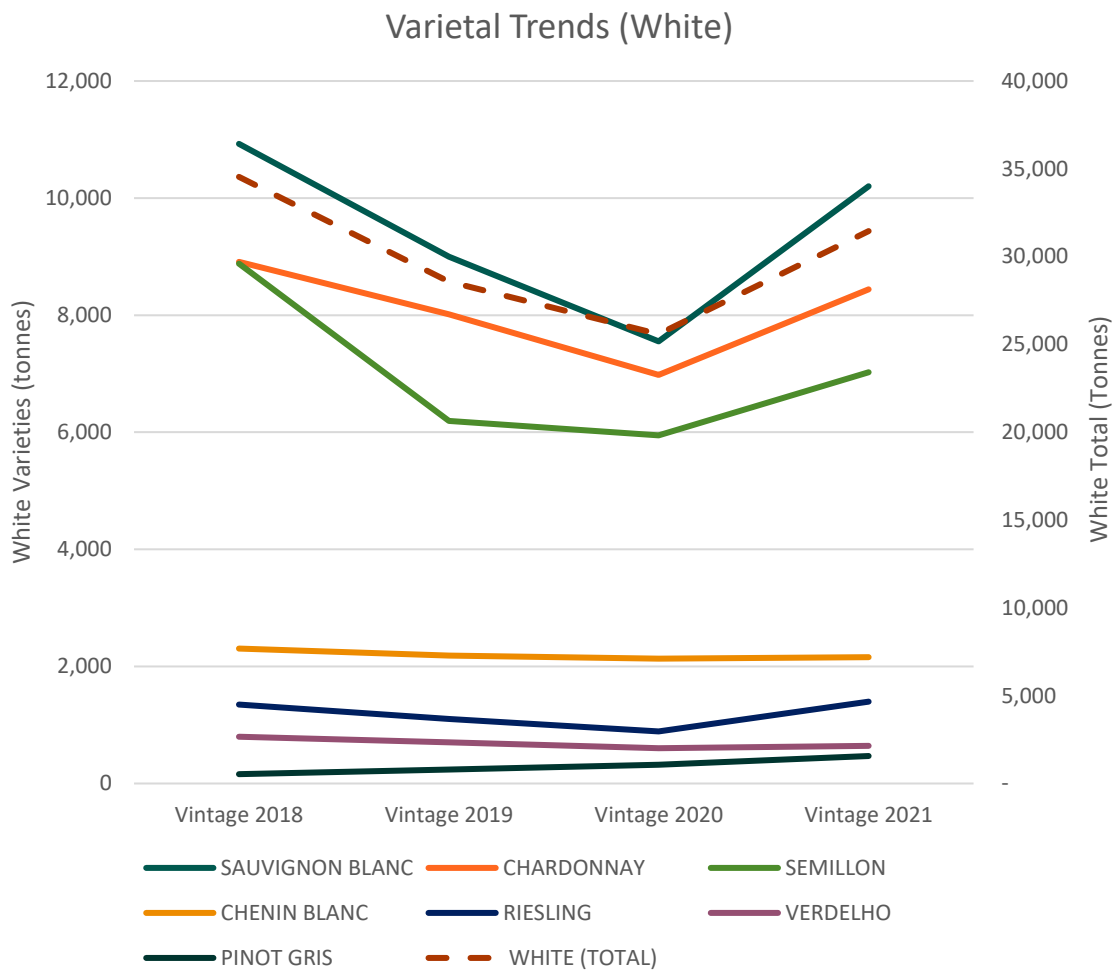
- The production for the 2021 vintage was 17.7% higher than the prior year [2021: 54,116 tonnes; 2020: 45,968 tonnes], with total production also performing favorably against the four-year average [average: 52,767 tonnes].
- Driving this improvement was a 22.9% increase in reported white variety production 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).

Vintage 2021 by Region



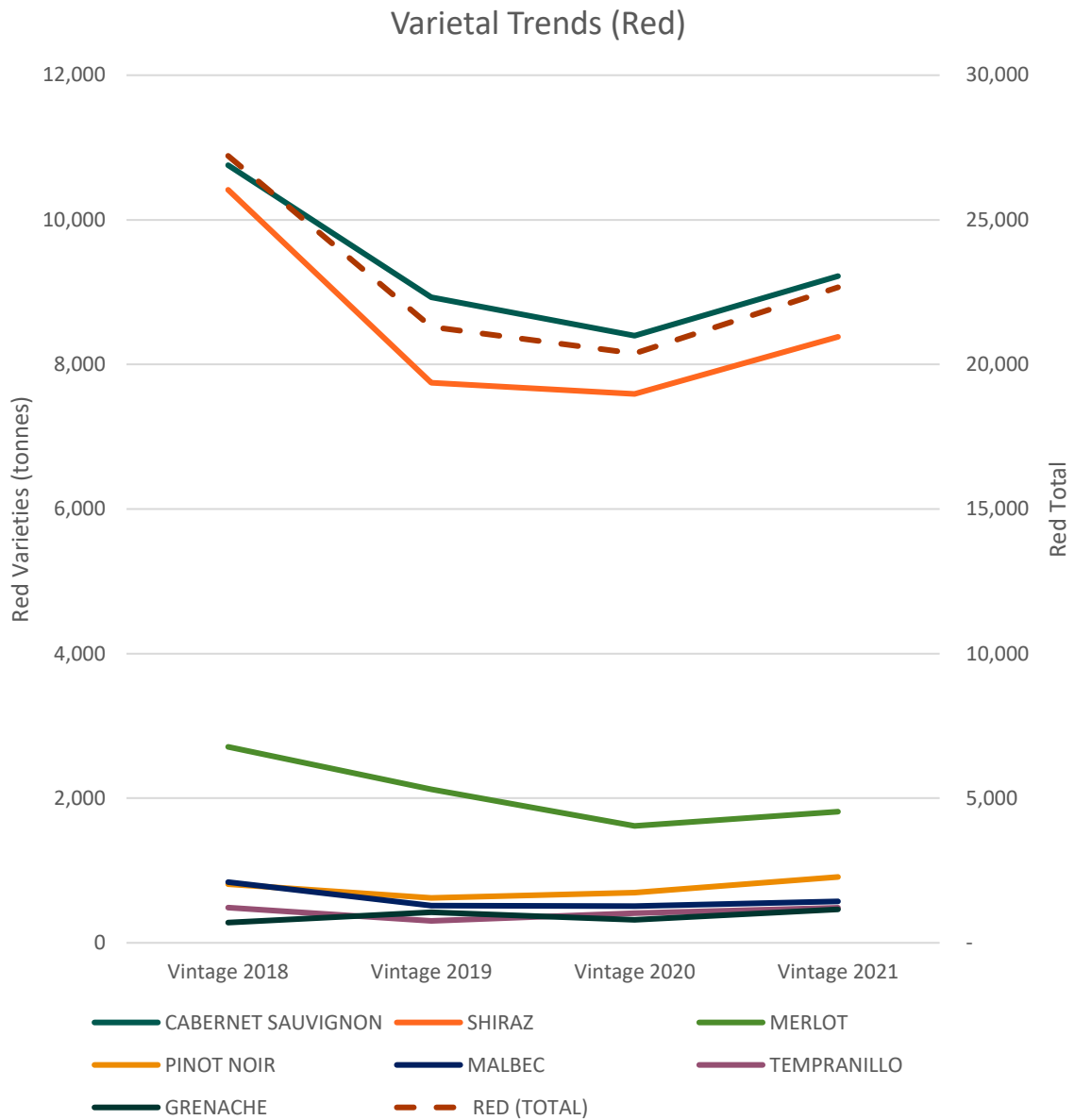
## State Varietal Trends: Snapshot

### 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

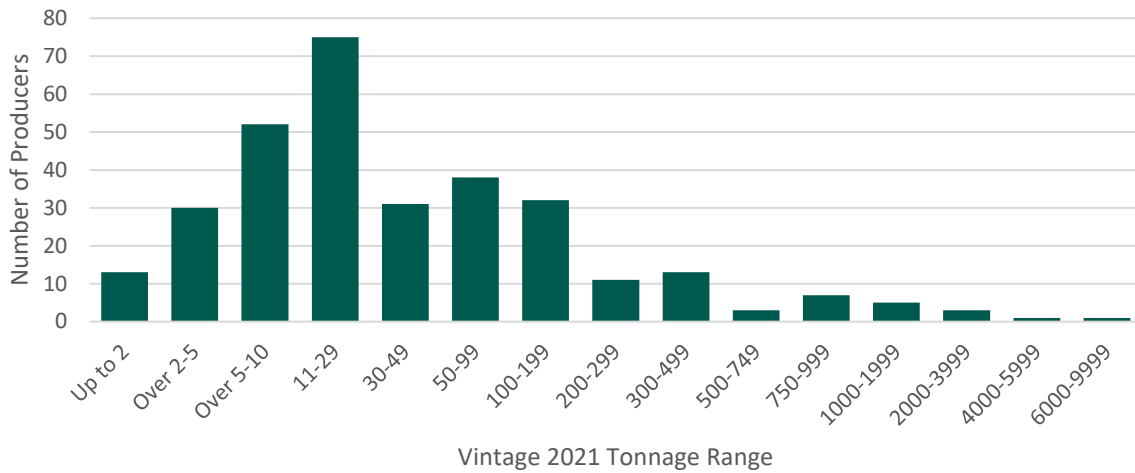
Red Variety	Vintage 2018	Vintage 2019	Vintage 2020	Vintage 2021
CABERNET SAUVIGNON	10755.1	8930.4	8397.3	9220.6
SHIRAZ	10414.9	7748.0	7591.6	8381.7
MERLOT	2710.3	2123.9	1616.9	1814.4
PINOT NOIR	812.2	621.2	695.4	910.8
MALBEC	839.9	515.9	507.6	572.5
TEMPRANILLO	487.0	303.4	409.6	484.5
GRENACHE	279.9	424.1	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
<b>RED (TOTAL)</b>	<b>27210.9</b>	<b>21300.9</b>	<b>20379.8</b>	<b>22664.1</b>

## Wine Producers' Committee: Vintage 2021 Snapshot

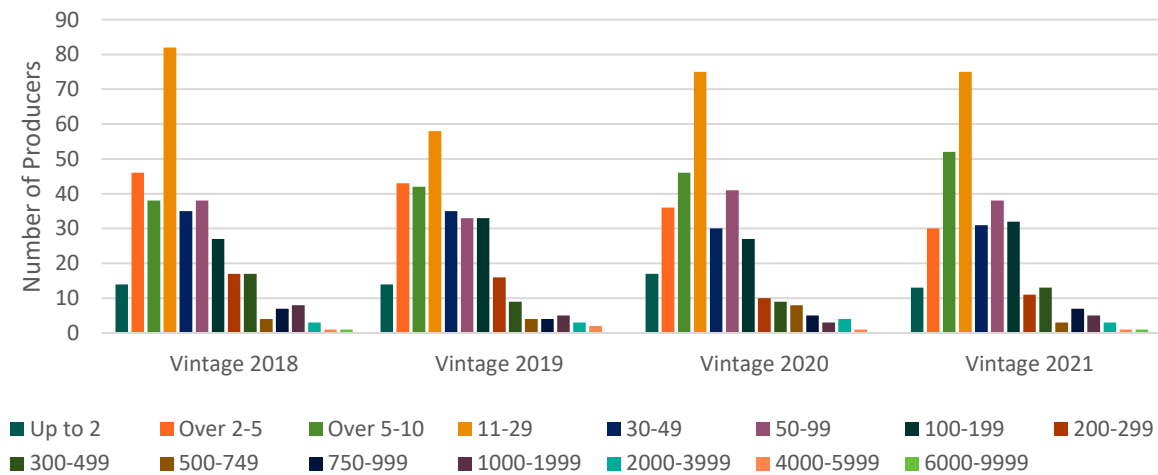
White Variety	Vintage 2018	Vintage 2019	Vintage 2020	Vintage 2021
SAUVIGNON BLANC	10926.29	8997	7552.3517	10203.2
CHARDONNAY	8910.54	8014	6979.344	8442.3
SEMILLON	8880.30	6194	5946.925	7025.2
CHENIN BLANC	2304.96	2186	2132.926	2156.1
RIESLING	1350.63	1102	889.77	1398.1
VERDELHO	799.22	705	603.211	645.7
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	
<b>WHITE (TOTAL)</b>	<b>34,542.37</b>	<b>28,581.41</b>	<b>25,588.16</b>	<b>31,452.14</b>

## WA Industry Profile

### Vintage 2021: Industry Profile



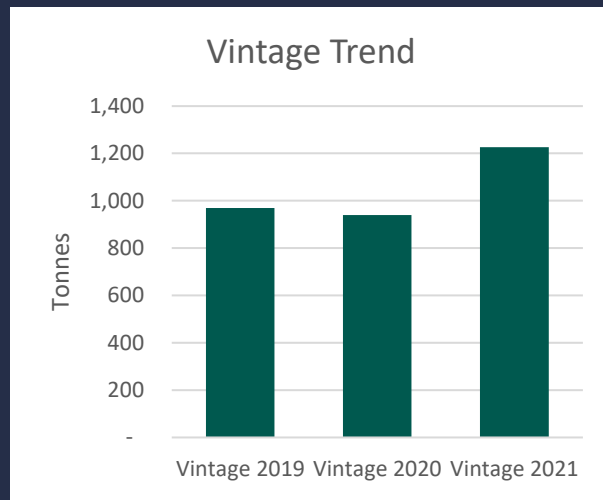
### Industry Profile Trends



- 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

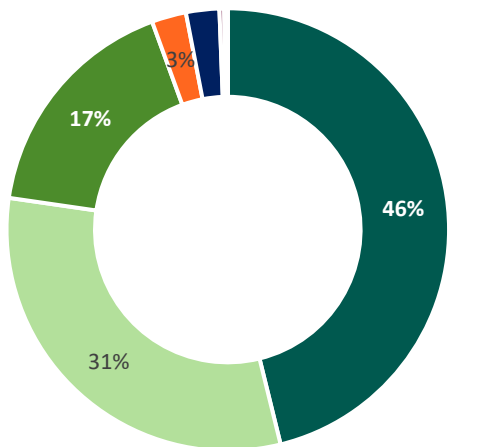


Blackwood region saw a 30% (286 tonnes) increase over the 2020 vintage, with a three-year high of 1,226 tonnes.

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

### Vintage 2021 Red Varieties

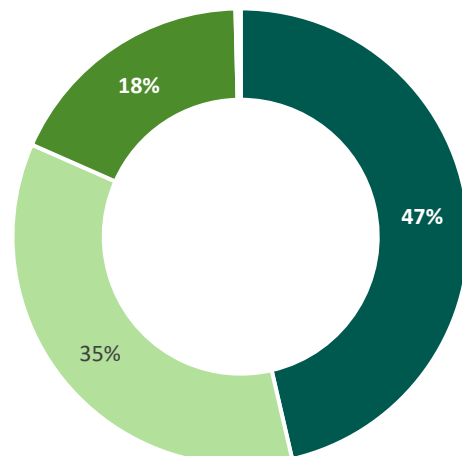
\*Excl. varieties providing <1% total production



- SHIRAZ
- MERLOT
- TEMPRANILLO
- BARBERA
- PETIT VERDOT
- CABERNET SAUVIGNON
- MALBEC
- GRENACHE
- DURIF

### Vintage 2021 White Varieties

\*Excl. varieties providing <1% total production



- SAUVIGNON BLANC
- SEMILLON
- CHARDONNAY
- VERMINTINO
- VIOGNIER
- OTHER
- MUSCAT BLANC A PETITS GRAINS

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).

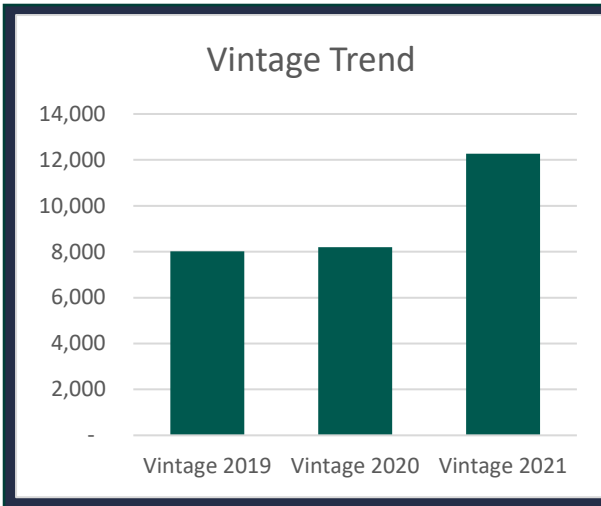
The growth in white varieties for the Blackwood region was visible across all varieties, with the strongest growth coming from semillon (+123 tonnes), chardonnay (+59 tonnes) and sauvignon blanc (+57 tonnes).

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.





Great Southern Region

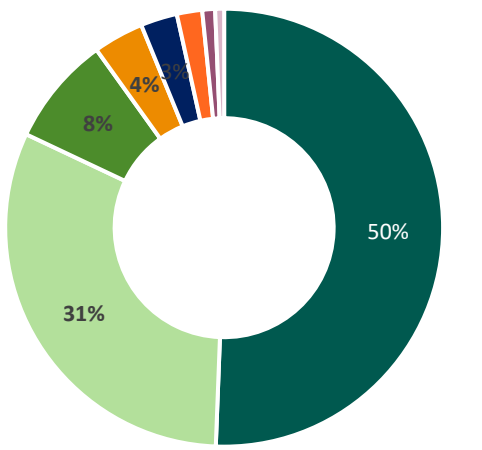


The 2021 vintage demonstrated substantial growth for the Great Southern region, with a reported 12,269 tonnes of produce – a 50% increase on 2020 (8,198 tonnes) and stronger than the 2018 high of 11,834 tonnes.

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].

Vintage 2021 Red Varieties

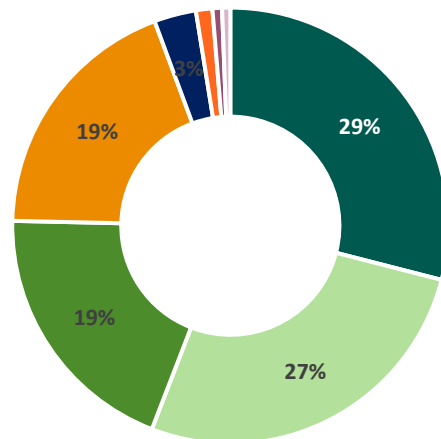
\*Excl. varieties providing <1% total production



- SHIRAZ
- PINOT NOIR
- MALBEC
- GRENACHE
- CABERNET SAUVIGNON
- MERLOT
- TEMPRANILLO
- CABERNET FRANC

Vintage 2021 White Varieties

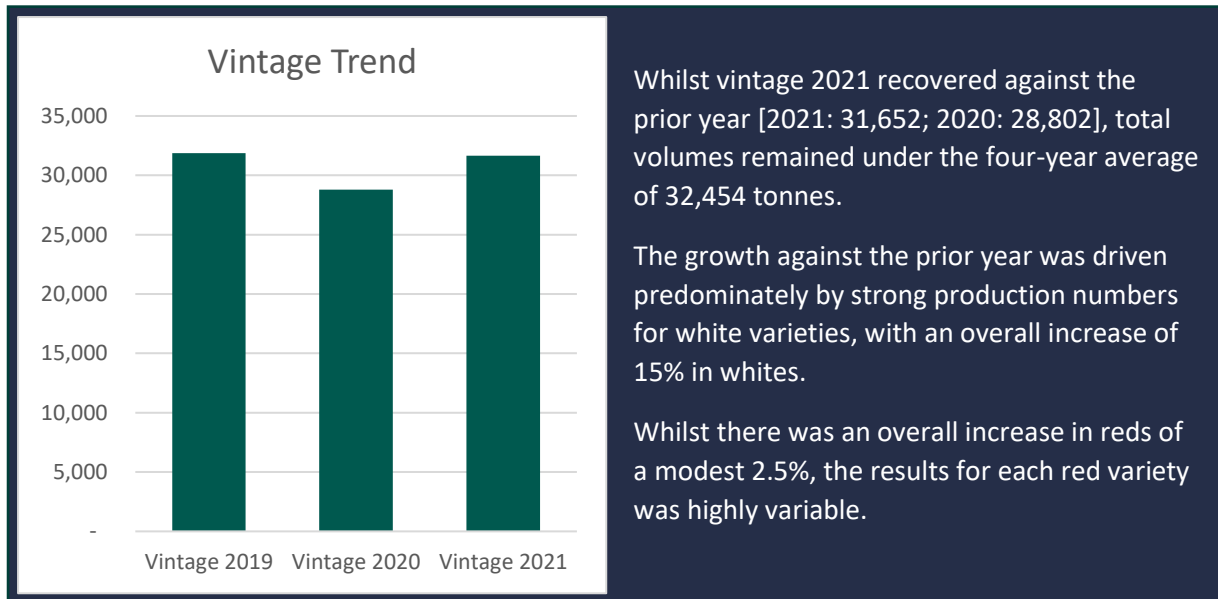
\*Excl. varieties providing <1% total production



- SAUVIGNON BLANC
- RIESLING
- PINOT GRIS
- VIOGNIER
- CHARDONNAY
- SEMILLON
- GEWURZTRAMINER
- VERMINTINO

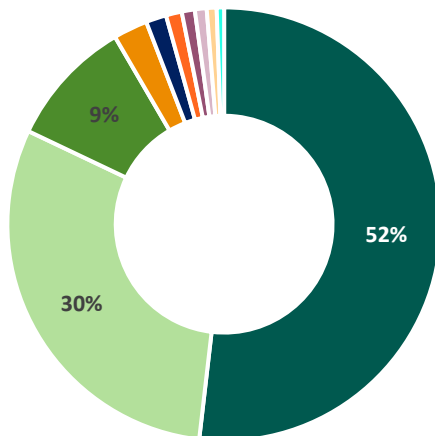
- Shiraz (3,239 tonnes) and cabernet sauvignon (2,010 tonnes) accounted for 81% of total reported red production. Both varieties performed strongly, with 2021 increases of 24% and 55% respectively.
- Of the less common red varieties, there was substantial growth in pinot noir, merlot, malbec and tempranillo.
- 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



Vintage 2021 Red Varieties

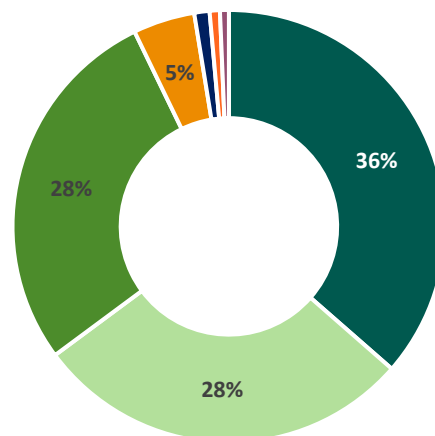
\*Excl. varieties providing <1% total production



- CABERNET SAUVIGNON
- MERLOT
- TEMPRANILLO
- CABERNET FRANC
- GRENACHE
- SHIRAZ
- MALBEC
- PINOT NOIR
- PETIT VERDOT
- OTHER

Vintage 2021 White Varieties

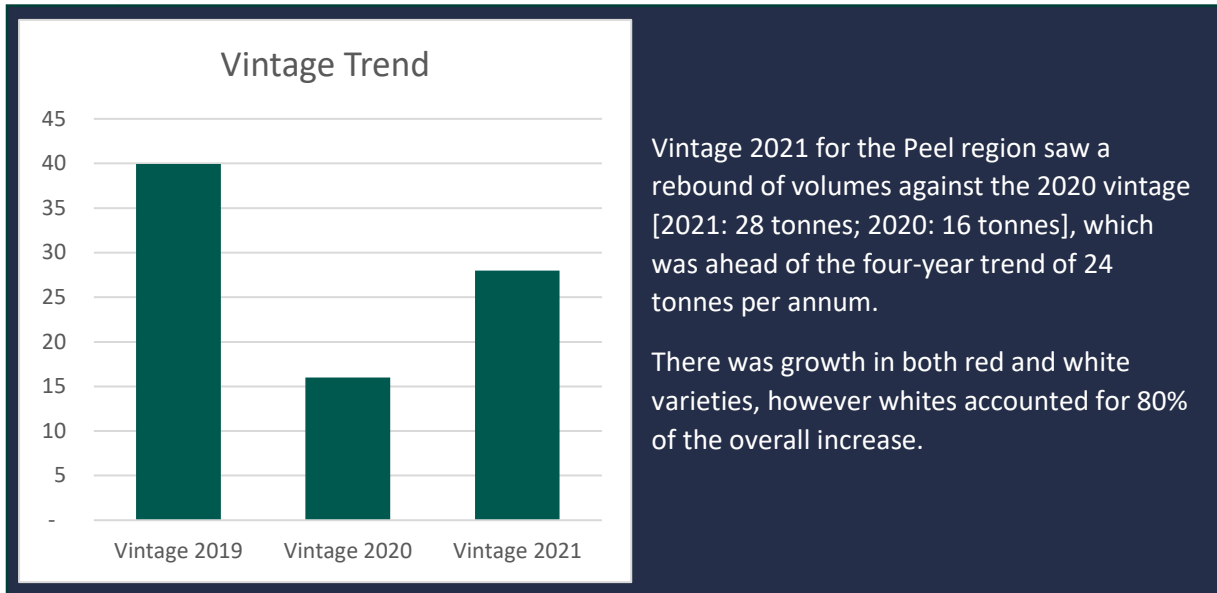
\*Excl. varieties providing <1% total production



- SAUVIGNON BLANC
- SEMILLON
- RIESLING
- SAVIGNIN BLANC
- CHARDONNAY
- CHENIN BLANC
- PINOT GRIS

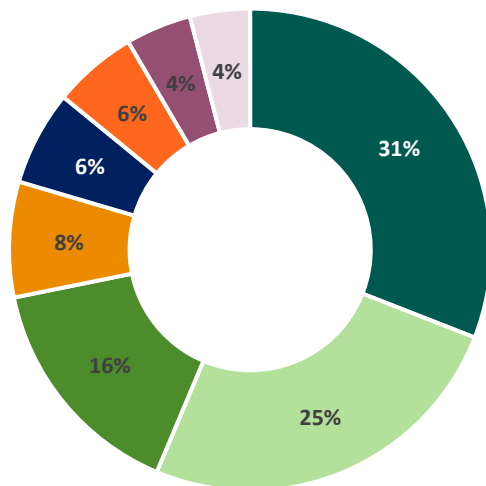
- Cabernet Sauvignon and shiraz remained the most common red varieties, however the 2021 vintage saw a substantial drop in shiraz [2021: 3,739 tonnes; 2020: 4,231 tonnes] compared to the gains in cabernet sauvignon [2021: 6,414 tonnes; 2020: 5,619 tonnes]
- Vintage 2021 saw tempranillo overtake cabernet 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 Red Varieties

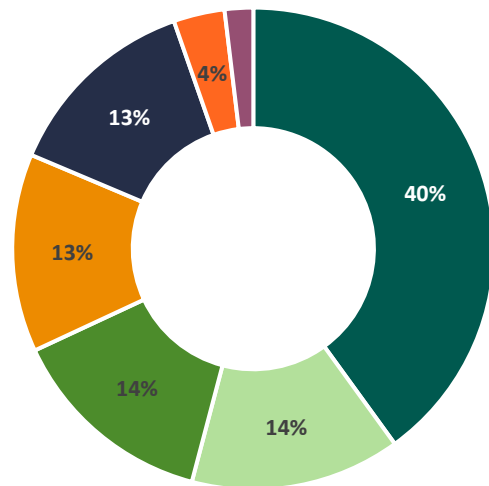
\*Excl. varieties providing <1% total production



■ CABERNET SAUVIGNON	■ SHIRAZ
■ MERLOT	■ PINOT NOIR
■ CABERNET FRANC	■ TEMPRANILLO
■ OTHER	■ ZINFANDEL

Vintage 2021 White Varieties

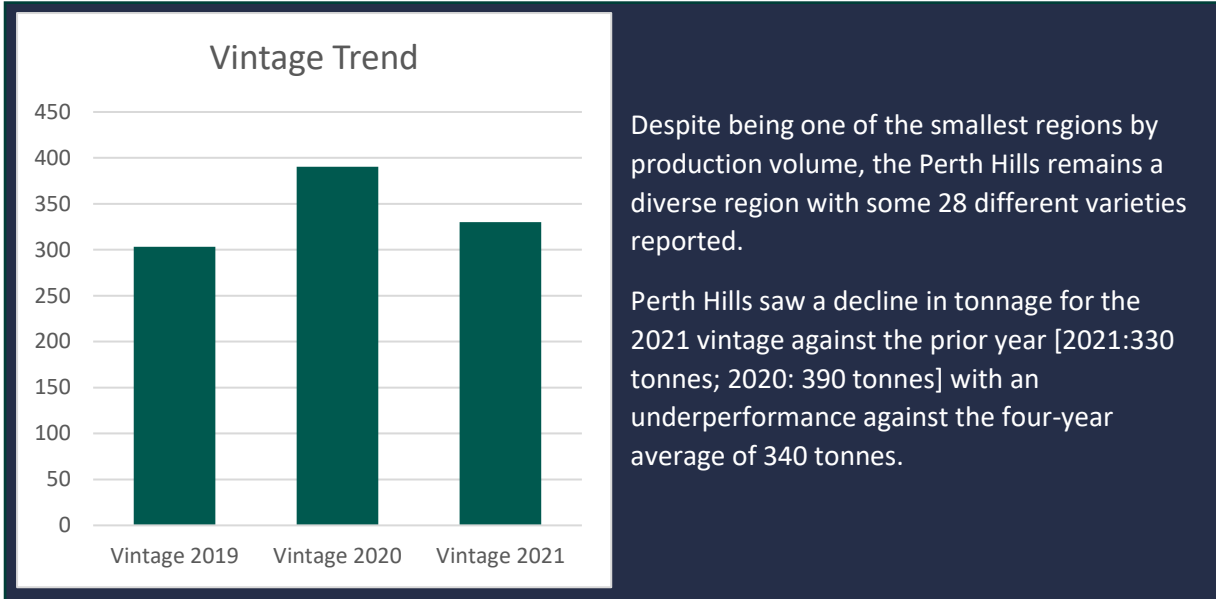
\*Excl. varieties providing <1% total production



■ CHARDONNAY	■ CHENIN BLANC
■ VERDELHO	■ SAUVIGNON BLANC
■ SEMILLON	■ FIANO
■ MUSCADELLE	

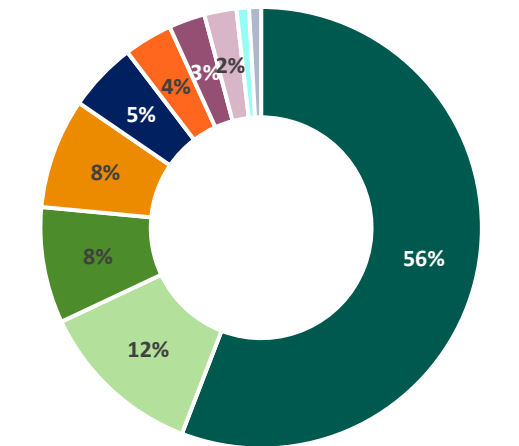
- Cabernet sauvignon overtook shiraz as the largest variety of red produced at 4 tonnes (against 3.3 tonnes shiraz). Both varieties were up on the prior year.
- The strongest varietal growth came from chardonnay. It grew from 1.8 tonnes in the 2020 vintage to 6 tonnes in the 2021 vintage to overtake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

Perth Hills Region



Vintage 2021 Red Varieties

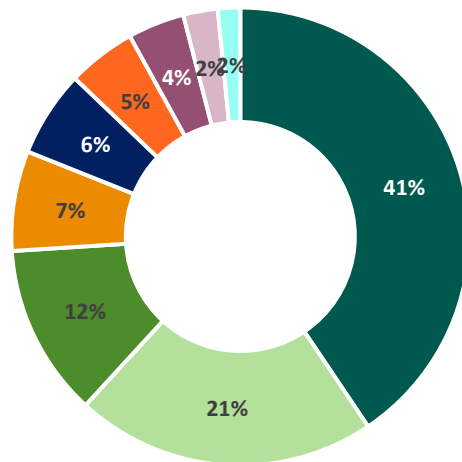
\*Excl. varieties providing <1% total production



- SHIRAZ
- GRENACHE
- MERLOT
- DURIF
- BARBERA
- CABERNET SAUVIGNON
- TEMPRANILLO
- PINOT NOIR
- OTHER
- BRACHETTO

Vintage 2021 White Varieties

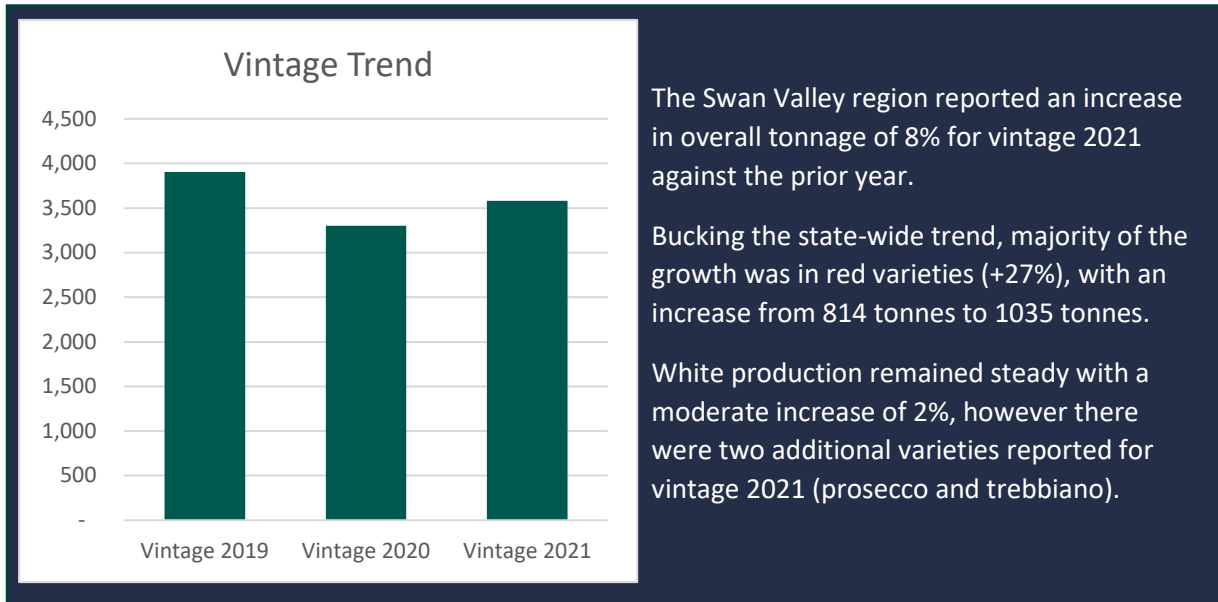
\*Excl. varieties providing <1% total production



- CHARDONNAY
- VIIGNIER
- OTHER
- VERDELHO
- GEWURTZTRAMINER
- VERMINTINO
- SEMILLON
- VERDEJO
- FIANO

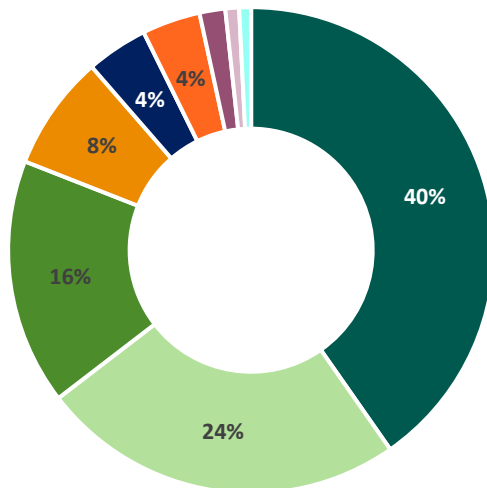
- Despite a moderate increase in tempranillo, shiraz [2021: 140 tonnes; 2020: 158 tonnes], cabernet sauvignon [2021: 30 tonnes; 2020: 32 tonnes] and grenache [2021: 21 tonnes; 2020: 24 tonnes] all saw a softening of production quantity in vintage 2021.
- There was a substantial drop in white production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

### Swan Valley Region



### Vintage 2021 Red Varieties

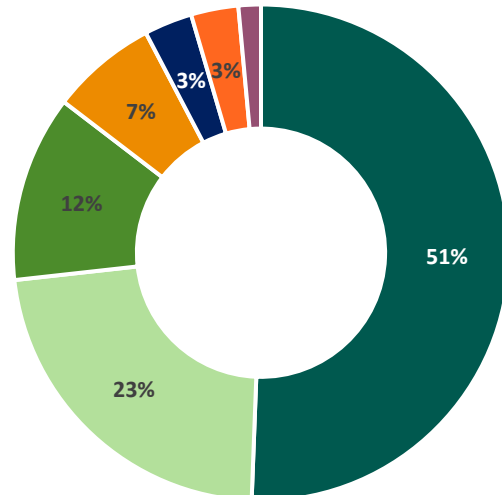
\*Excl. varieties providing <1% total production



■ SHIRAZ	■ GRENACHE
■ CABERNET SAUVIGNON	■ OTHER
■ TEMPRANILLO	■ MERLOT
■ SANGIOVESE	■ MALBEC
■ PETIT VERDOT	

### Vintage 2022 White Varieties

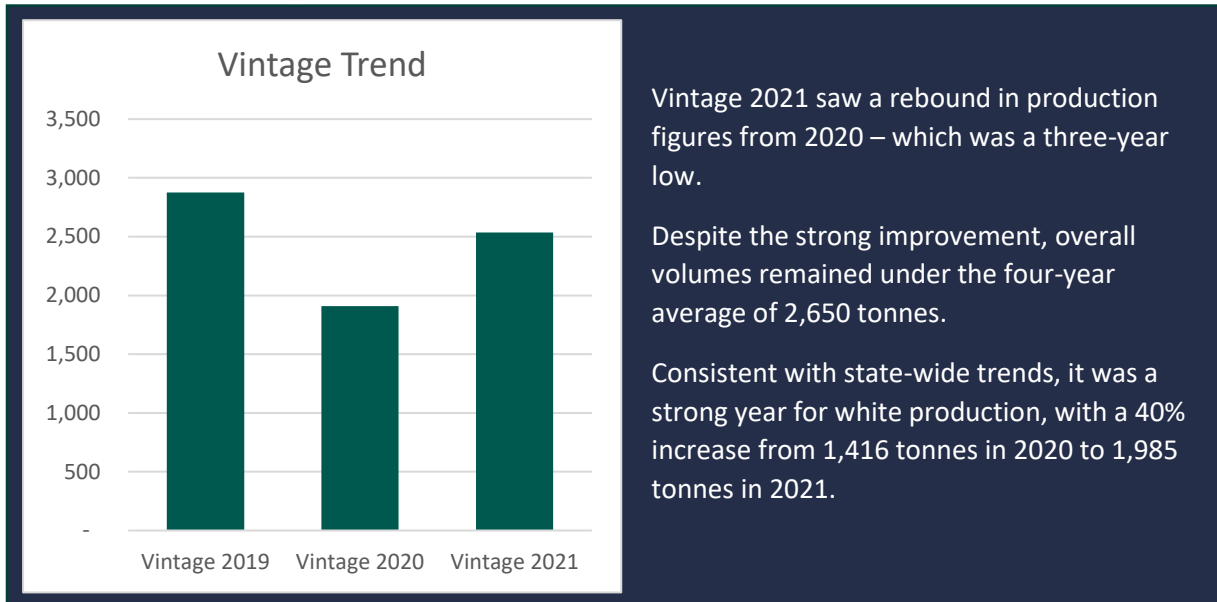
\*Excl. varieties providing <1% total production



■ CHENIN BLANC	■ VERDELHO	■ CHARDONNAY
■ MUSCADELLE	■ SEMILLON	■ OTHER
■ PINOT GRIS		

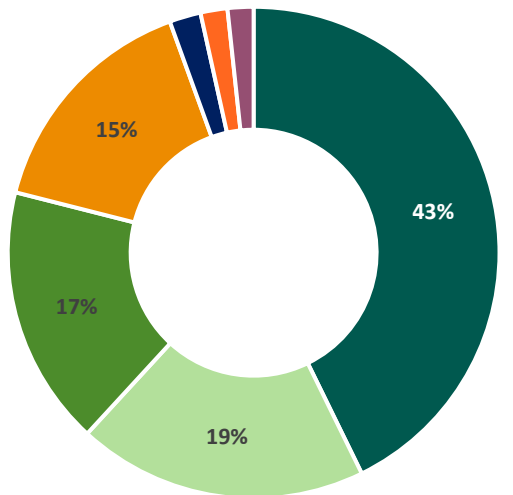
- Shiraz, grenache and cabernet sauvignon collectively accounted for 79% of total red volumes for the 2021 vintage. All three varieties saw an increase over the prior year of 37 tonnes, 71 tonnes and 38 tonnes respectively.
- Other growth in red varieties was also demonstrated for tempranillo and sangiovese.
- 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 Red Varieties

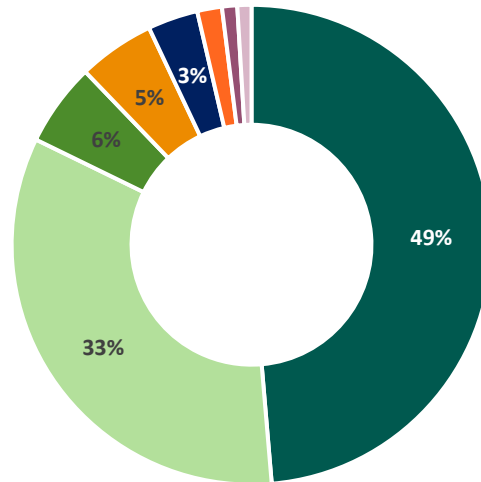
\*Excl. varieties providing <1% total production



- PINOT NOIR
- MERLOT
- MALBEC
- ZINFANDEL
- SHIRAZ
- CABERNET SAUVIGNON
- PETIT VERDOT

Vintage 2021 White Varieties

\*Excl. varieties providing <1% total production



- SAUVIGNON BLANC
- PINOT GRIS
- SEMILLON
- SAVIGNIN BLANC
- CHARDONNAY
- PROSECCO
- OTHER
- RIESLING

- 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.