



Wine Producers' Committee

Annual Snapshot

2023 – 24 Financial Year

(Vintage 2023)

Wines of WA Executive Summary

The Annual vintage snapshot provides WA wine producers with a comprehensive set of production data by region and variety. The collection is retrospective by one year meaning comprehensive data is available for the previous vintage in this case, 2023. However, as this is the seventh year of APC fee for service collection there are consistent trends apparent.

- Average state production is 55,000 tonnes annually noting 2023 was slightly higher at 57,000.
- Comprised of approximately 55% white varieties and 45% red varieties.
- Top three white varieties by volume are Sauvignon Blanc, Chardonnay and Semillon and comprise 84% of total white production. Other important white varieties include Chenin Blanc, Riesling and Verdelho.
- Top three red varieties by volume are Shiraz, Cabernet Sauvignon and Merlot and comprise 86% of total red production. Other important red varieties include Pinot Noir, Malbec, Tempranillo and Grenache.

A strength of WA is our diversity of climate/terroir across regions. There are no directly competing varietal heroes across our regions. This is an important aspect of the fine wine regions of WA story. These data show that regions have identified their regional varietal heroes based on both suitability to climate and available product to sell.

There is further detail below which outlines the demographic profile of the WA wine industry. While all WA producers are small/medium by national parameters, our industry is skewed towards small in total numbers.

- 80% of producers are processing less than 200 tonnes annually and account for 20% of total production.
- 13% of producers are processing between 200 – 500 tonnes annually and account for 15% of total production.
- 7% of producers are processing over 500 tonnes annually and account for 65% of total production.

The production information gathered via the APC fee-for-service collection is a valuable resource for WA wine producers. Wines of Western Australia is working with the APC to further utilise this resource and make insights available to producers to assist in their medium to long term business planning.

Beyond production data collation, the APC fee-for-service funds a comprehensive set of state and regional services to producers, delivered in partnership by Wines of Western Australia and Regional Wine associations. Services include: advancing a strong brand which enhances the reputation of Western Australian fine wine regions; expanding local, interstate and international market opportunities; supporting producers in research, development and education to build a sustainable industry and representing producers to positively influence regulation and policy matters.

Larry Jorgensen



Chief Executive Officer
Wines of WA

About this Report

In Western Australia, a range of industry development, market development, consumer promotion and other services for the benefit of winegrape producers are funded through an Agricultural Produce Commission annual fee-for-service. The fee-for-service collected in 2023/24 was based on the 2023 vintage. As part of the fee collection process, and to provide valuable market insight for fee-for-service payers, varietal data for the 2023 vintage was collected from wine producers who remitted during the 2023/24 financial year and the analysis of that data is presented in this report.

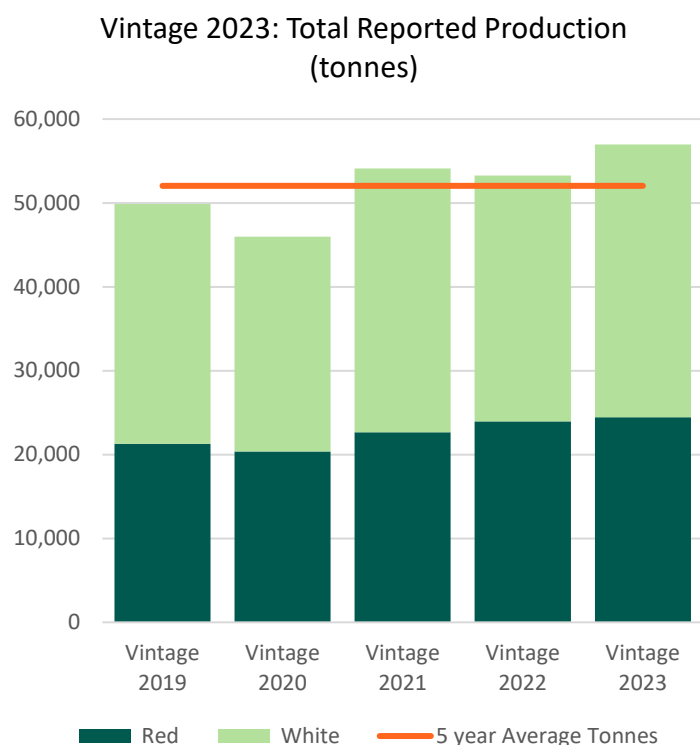
Producers may note that there are differences in the figures and trends reported when compared to the Wine Australia National Vintage Report for the same vintage. This is largely due to methodology and timing, with the National Vintage Report offering essential early insights based on a methodology relying on the voluntary survey, whereas the APC report is prepared based on historical actual production data reported for the vintage.

Disclaimer

This information has been made available to assist on the understanding that the Agricultural Produce Commission is not rendering professional advice. The Agricultural Produce Commission accepts no responsibility for the results of any actions taken based on the information contained in this report, nor for the accuracy, currency or completeness of any material contained in it. The Agricultural Produce Commission expressly disclaims all and any liability and responsibility to any person in respect of consequences of anything done in respect of reliance, whether wholly or in part, upon this report.

Vintage 2023: State Summary

Based on their national survey data, the Wine Australia National Vintage Report 2023 anticipated the Australian winegrape crush would be the smallest in a generation, and 24 per cent below the 2022 vintage. Despite the expectations of a substantial drop nationally, the Report envisaged that the vintage 2023 crush in Western Australia would be consistent with 2022. Pleasingly, the 2023 vintage saw Western Australia buck national trend estimates, and outperform early state estimates, seeing real production growth in both red and white varieties.



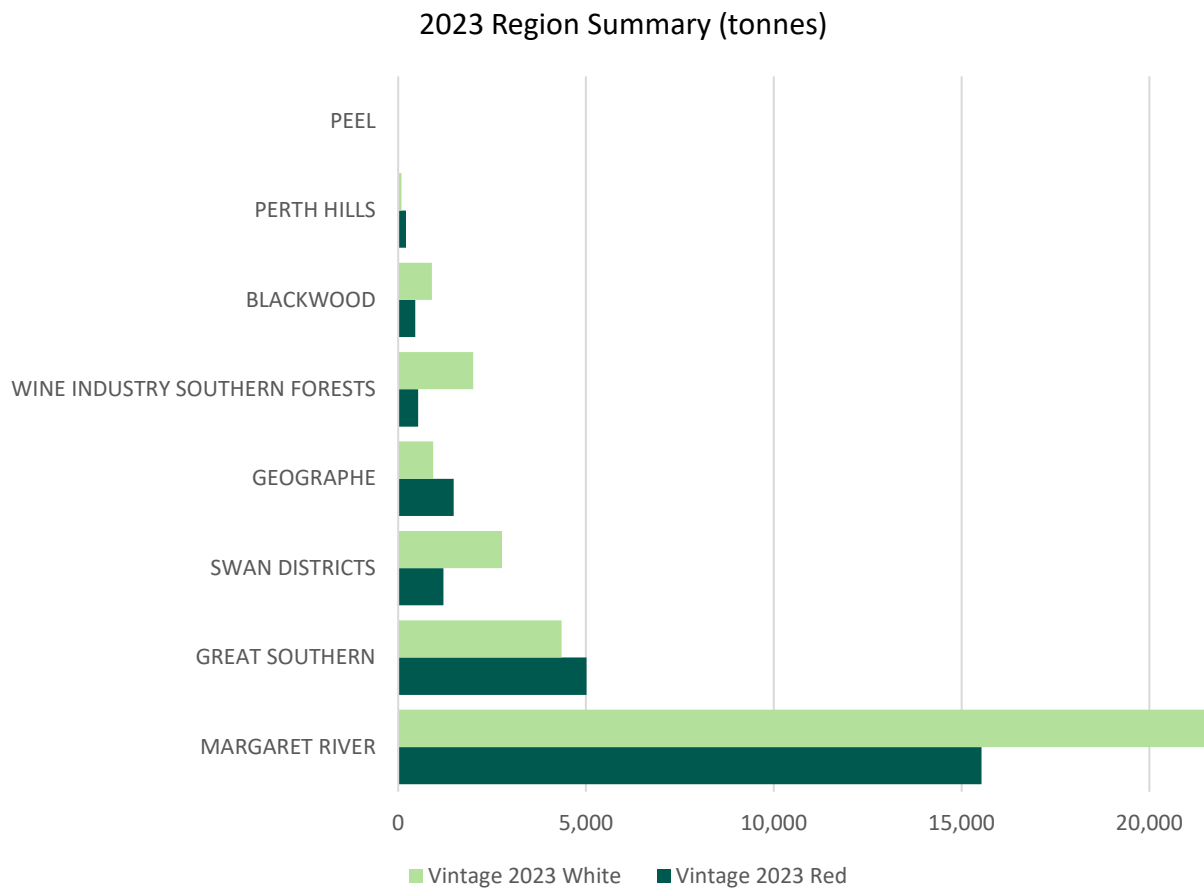
- Total reported production for the 2023 vintage was 56,963 tonnes. This is an increase of 3,688 tonnes (6.9%) over the prior vintage [2022: 53,274 tonnes]. Overall vintage 2023 production levels were 9.5% higher than the five-year average [average: 52,041 tonnes].
- Statewide, both red and white variety tonnages were up by 2% and 11%, respectively.
- Tonnage growth was inconsistent across regions and varieties, however, with year-on-year reductions reported in four regions and against some of the major varieties.

Table: Vintage 2023 Reported Production by Region (tonnes)

	Red		White		Total		
	2022	2023	2022	2023	2022	2023	
Margaret River	13,225.3	15,529.9	17,749.5	21,467.1	30,974.8	36,997.0	●
Great Southern	6,801.9	5,013.7	5,332.5	4,351.6	12,134.4	9,365.2	●
Swan Valley	1,016.6	1,206.6	2,356.6	2,767.6	3,373.2	3,974.2	●
Geographe	1,461.1	1,477.5	1,051.2	932.4	2,512.3	2,409.9	●
Southern Forests	433.4	533.9	1,879.8	1,997.5	2,313.2	2,531.4	●
Blackwood	569.9	457.8	776.1	900.6	1,346.1	1,358.3	●
Perth Hills	435.6	209.9	142.1	85.2	577.8	295.1	●
Peel	31.1	18.1	11.8	13.5	42.9	31.6	●
Total	23,974.9	24,474.4	29,299.6	32,515.3	53,274.5	56,962.8	●

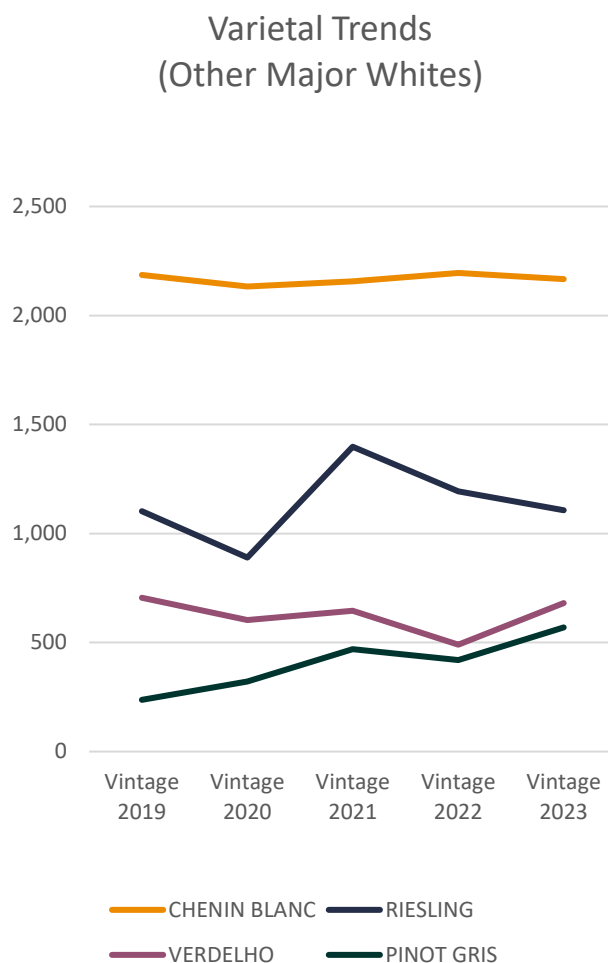
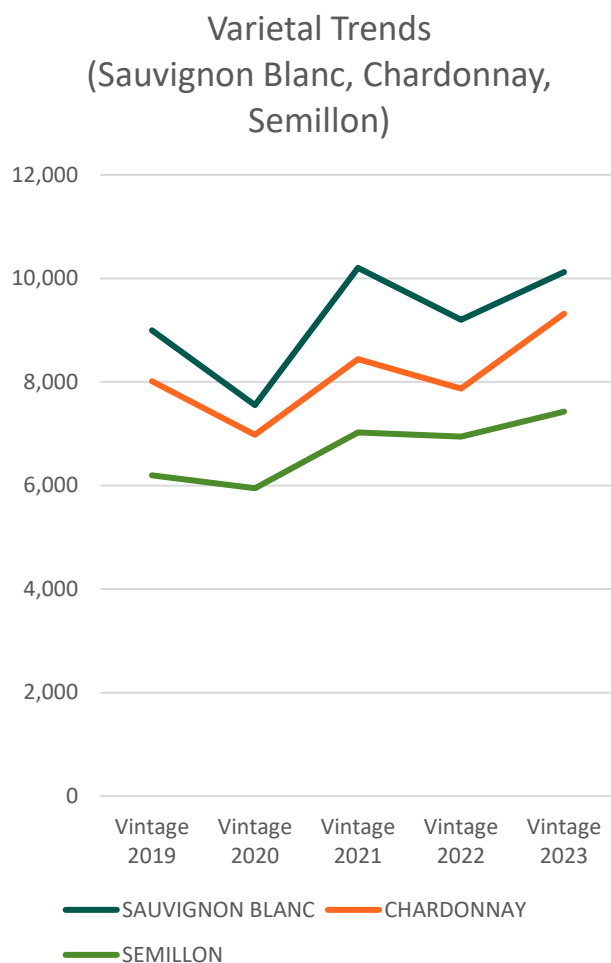
Key: ● YoY growth >5% ● YoY performance +/- 5% ● YoY reduction >5%

Wine Producers' Committee: Vintage 2023 Snapshot



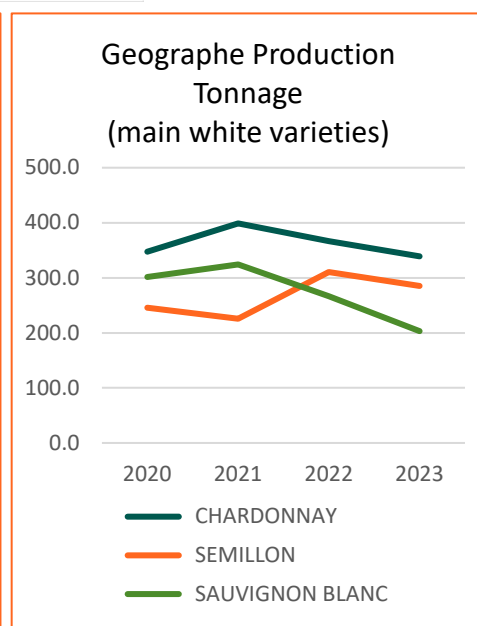
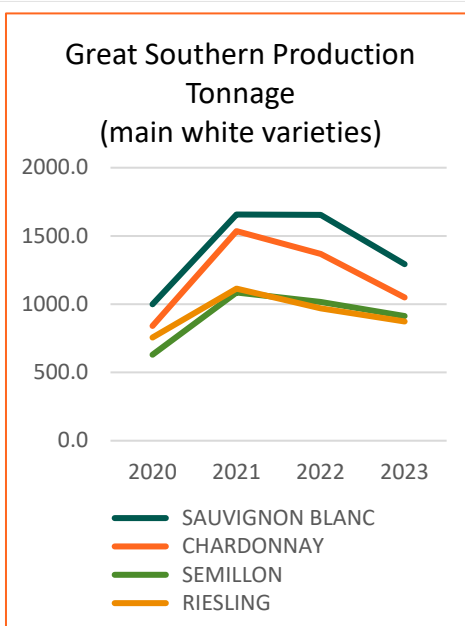
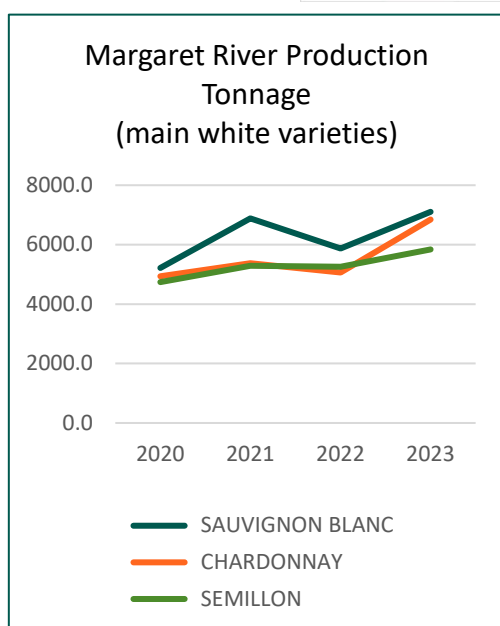
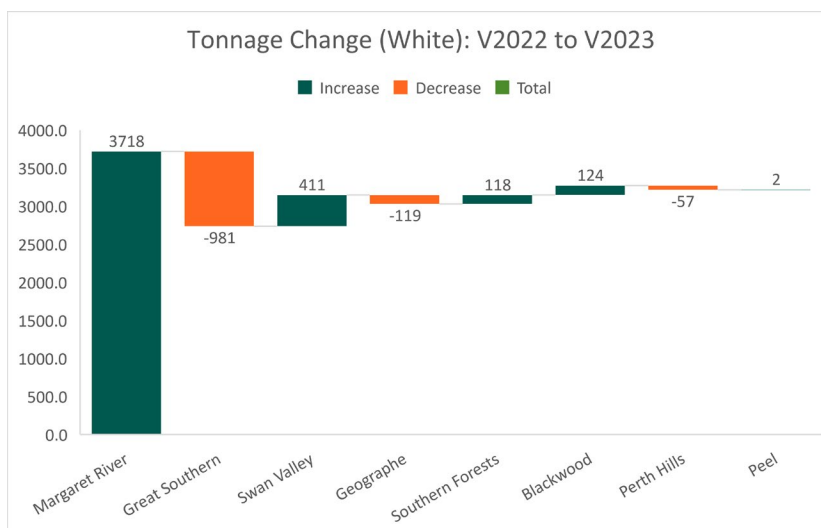
State Varietal Trends: Snapshot

Whites



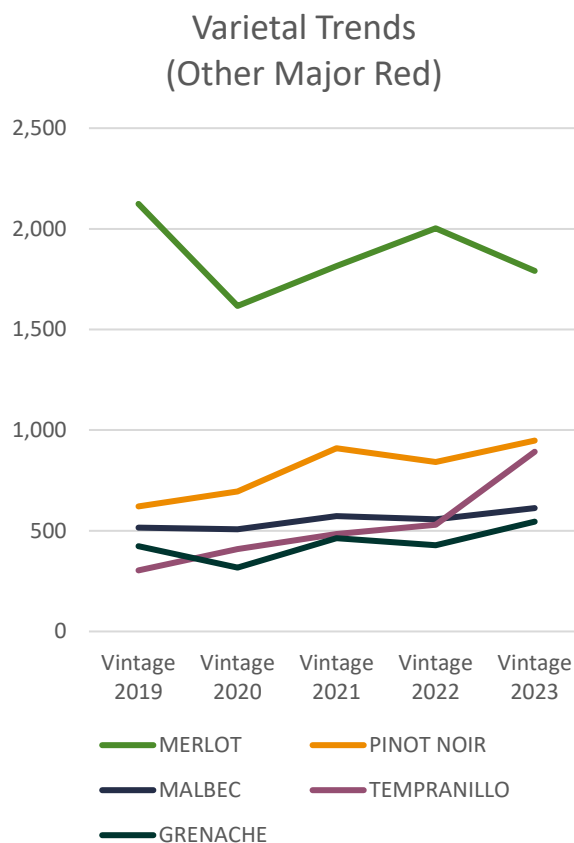
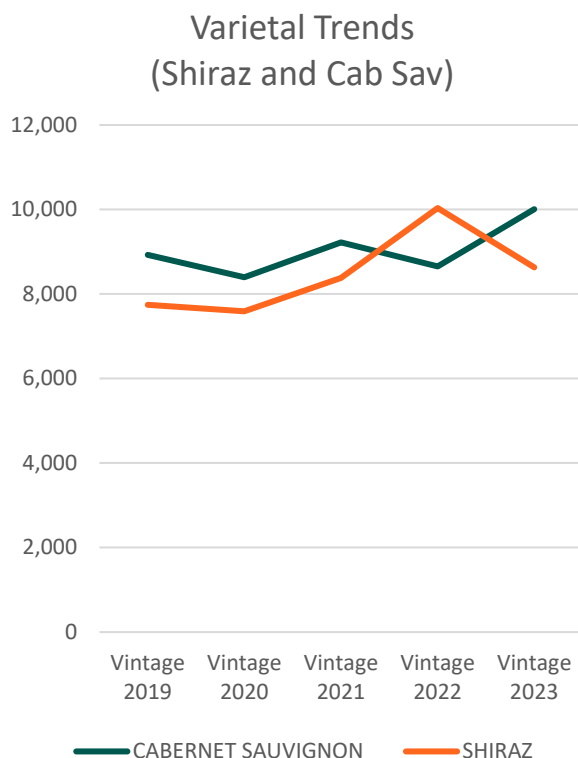
- The 2023 vintage the highest reported production of chardonnay since 2017, at 9,318 tonnes. This is a turnaround of 18% against the prior vintage [2022: 7,872 tonnes].
- Sauvignon blanc and verdelho both bounced back after soft 2022 figures, with increases of 10% and 7%, respectively. Semillon has also seen steady growth.
- Of the lesser produced varieties, pinot gris gives an example of continued year-on-year growth, from 159 tonnes for vintage 2018 to a recent record high of 569 tonne for the 2023 vintage.
- Whilst white production improved overall for vintage 2023, chenin blanc and riesling were exceptions to the trend, with reported production decreasing by 1% and 7 %, respectively.

Wine Producers' Committee: Vintage 2023 Snapshot



- Whilst there was robust growth across most white varieties, region to region the results were less consistent.
- Margaret River region saw an impressive 3,718 tonne (21%) increase in white production [2023: 21,467; 2022: 17,749]. This growth was across the three main white varieties. Primarily, the 1,778 tonne (35%) increase in chardonnay was 23% higher than the four-year average for Margaret River chardonnay.
- The Swan Valley growth of 411 tonnes was almost exclusively in chenin blanc (up 179 tonnes to a total of 1,381 tonnes) and verdelho (up 229 tonnes to a total of 604 tonnes).
- By contrast, and more in line with national trends, the Great Southern region saw a reduction of 981 tonnes or 18% [2023: 4,351; 2022: 5,332]. This meant that production levels were closer to vintage 2020 levels.
- Geographe also saw a reduction in white production of 118 tonnes or 11%. This was heavily influenced by a 24% reduction in sauvignon blanc.

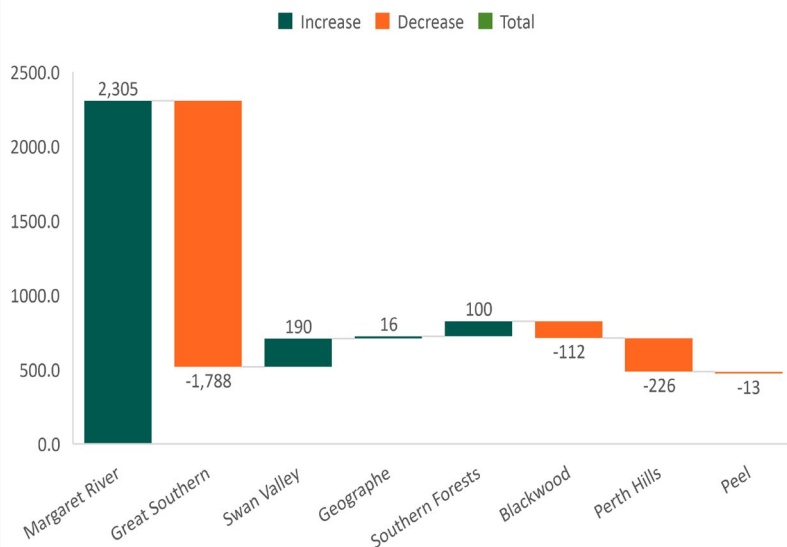
Reds



- The strong performance of cabernet sauvignon (+1,355 tonnes / 16%), tempranillo (+362 tonnes / 68%), grenache (+117 tonnes / 27 %) and pinot noir (+107 tonnes / 13%) offset reductions in shiraz (-1,402 tonnes / -14%), merlot (-212 tonnes / -11%) and sangiovese (-56 tonnes / -29%) volumes. The result is an overall increase in reported tonnage for reds of 2% for vintage 2023.
- The increase in production of cabernet sauvignon [2023: 10,008 tonnes; 2022: 8,652 tonnes] saw it return to the position of highest produced red variety. The level of cabernet sauvignon production is the highest since vintage 2018, and some 11% higher than the five-year average.
- Most of the lesser produced varieties saw year-on-year production increases, with nebbiolo, barbera, durif, graciano and gamay all hitting record levels of production since APC varietal reporting began in vintage 2018.

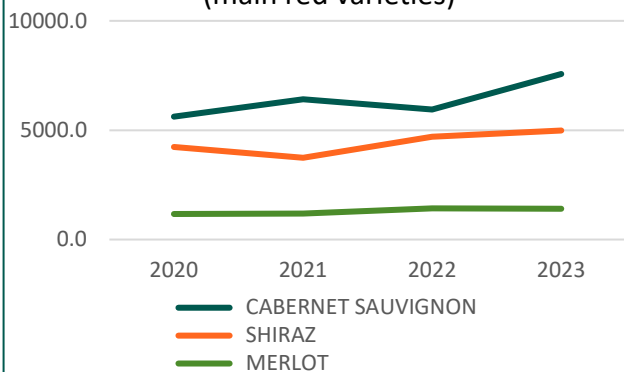
Wine Producers' Committee: Vintage 2023 Snapshot

Tonnage Change (Red): V2022 to V2023

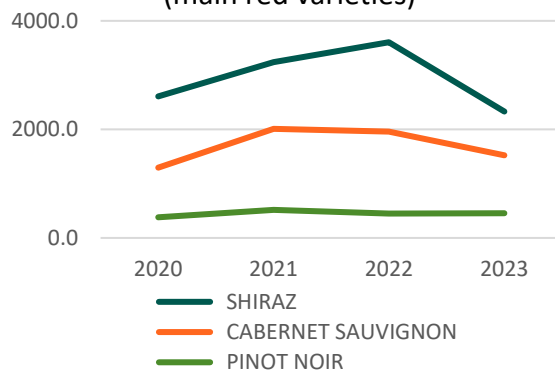


- Production variability in reds was experienced not only from variety to variety, but also between regions.
- Margaret River shiraz tonnage reversed the statewide trend of -14%, with an increase in shiraz production of 282 tonnes (6%). The Swan Valley shiraz tonnage also bucked the trend, holding steady against the prior year at 449 tonnes.
- By contrast, the Great Southern region saw a 2,329 tonne (35%) drop in shiraz. Perth Hills followed with a drop of 177 tonnes (72%).

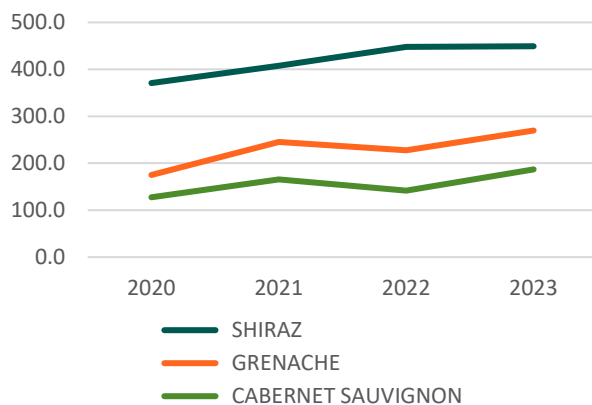
Margaret River Production Tonnage (main red varieties)



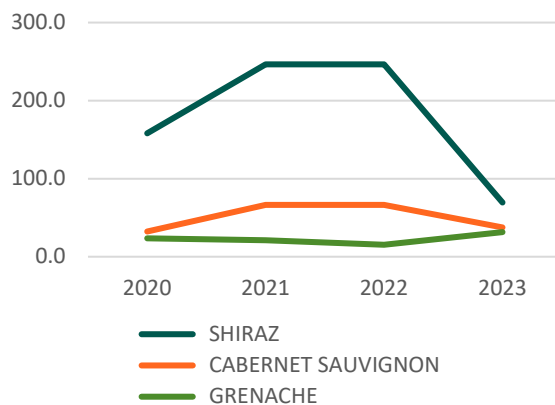
Great Southern Production Tonnage (main red varieties)



Swan Valley Production Tonnage (main red varieties)



Perth Hills Production Tonnage (main red varieties)



- Similarly, not all regions saw the same elevated level of cabernet sauvignon production growth (Statewide 16%).
- Perth Hills (-43%), Great Southern (-22%), Peel (-3%) all saw tonnage reductions, partially offsetting the substantial gains seen in Margaret River (27%), Geographe (33%) and the Swan Valley (32%).

Wine Producers' Committee: Vintage 2023 Snapshot

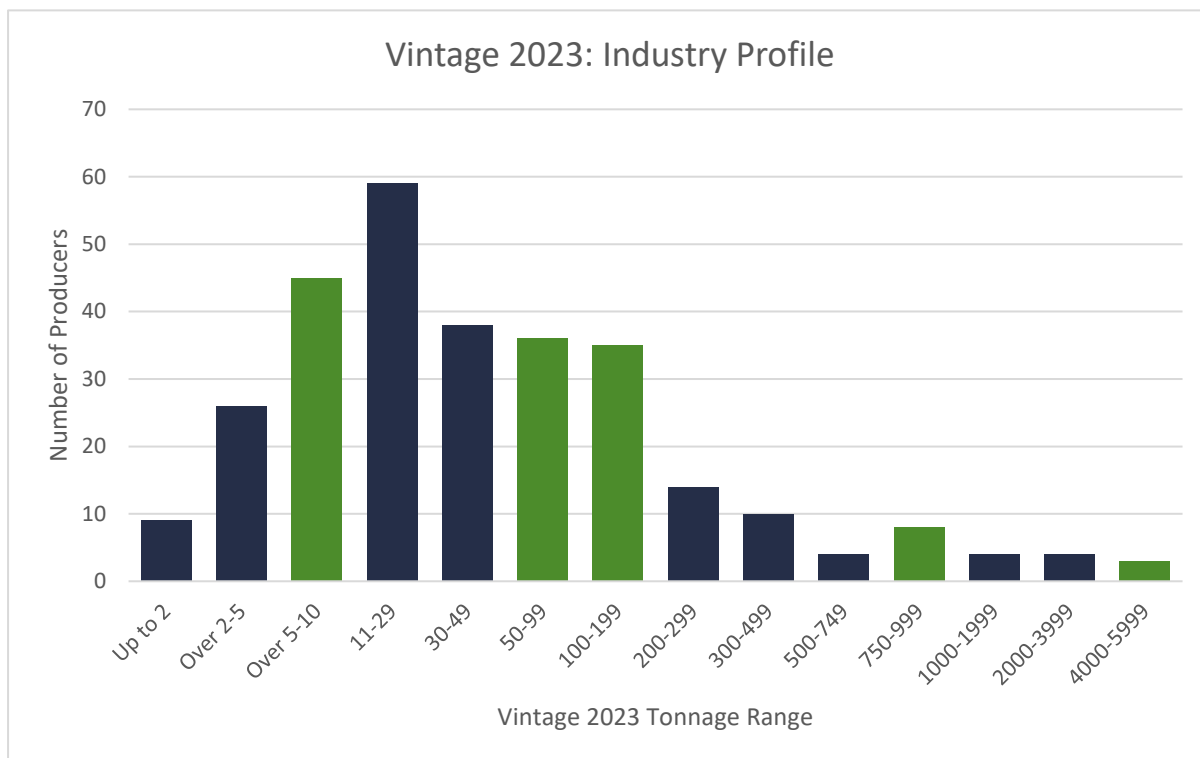
State Varietal Trends: Dataset

White Variety	Vintage 2018	Vintage 2019	Vintage 2020	Vintage 2021	Vintage 2022	Vintage 2023	vs prior year
SAUVIGNON BLANC	10,926.3	8,996.8	7,552.4	10,203.2	9,198.7	10,123.2	10.0%
CHARDONNAY	8,910.5	8,014.3	6,979.3	8,442.3	7,872.8	9,318.3	18.4%
SEMILLON	8,880.3	6,194.2	5,946.9	7,025.2	6,946.6	7,426.4	6.9%
CHENIN BLANC	2,305.0	2,186.3	2,132.9	2,156.1	2,195.0	2,166.3	-1.3%
RIESLING	1,350.6	1,102.1	889.8	1,398.1	1,193.2	1,106.1	-7.3%
VERDELHO	799.2	705.4	603.2	645.7	490.2	681.7	39.1%
PINOT GRIS	159.6	237.2	321.3	469.4	419.7	569.3	35.6%
MUSCADELLE	190.0	179.0	199.7	181.7	200.1	190.3	-4.9%
OTHER	213.6	235.3	83.6	161.4	274.5	184.7	-32.7%
SAVIGNIN BLANC	370.4	354.1	450.3	164.8	30.9	163.9	430.0%
VIOGNIER	126.2	82.1	88.6	119.8	91.0	112.4	23.5%
PROSECCO	14.9	14.0	55.5	103.9	42.6	89.2	109.7%
VERMINTINO	76.2	60.8	55.4	101.6	83.3	88.5	6.3%
GEWURTZTRAMINER	51.6	17.7	40.2	83.1	73.0	83.2	13.9%
MUSCAT BLANC A PETITS GRAINS	47.4	111.1	98.3	80.5	69.5	50.8	-27.0%
FIANO	43.1	28.1	36.6	50.6	68.2	48.7	-28.7%
VERDEJO	29.9	28.9	9.1	17.1	7.5	36.0	381.8%
ARNEIS	13.0	14.6	19.4	14.9	15.7	29.7	89.4%
GRUNER VELTLINER		1.6	5.7	12.0	4.3	14.4	238.0%
TREBBIANO	4.0	4.7	4.1	9.2	10.9	10.6	-2.4%
PEDRO XIMENEZ	14.3	8.3	7.6	4.6	6.3	6.7	6.4%
SCHEUREBE	6.4	4.0	3.6	3.1		4.4	
ROUSSANNE	1.4	0.8	1.3	2.0	1.4	2.1	46.4%
TRAMINER	8.4		2.1	2.0	2.2	0.4	-82.2%
HARSLEVELU			1.0				
ALBARINO					2.0	8.1	303.0%
WHITE (TOTAL)	\$ 34,542	\$ 28,581	\$ 25,588	\$ 31,452	\$ 29,300	\$ 32,515	\$ 0

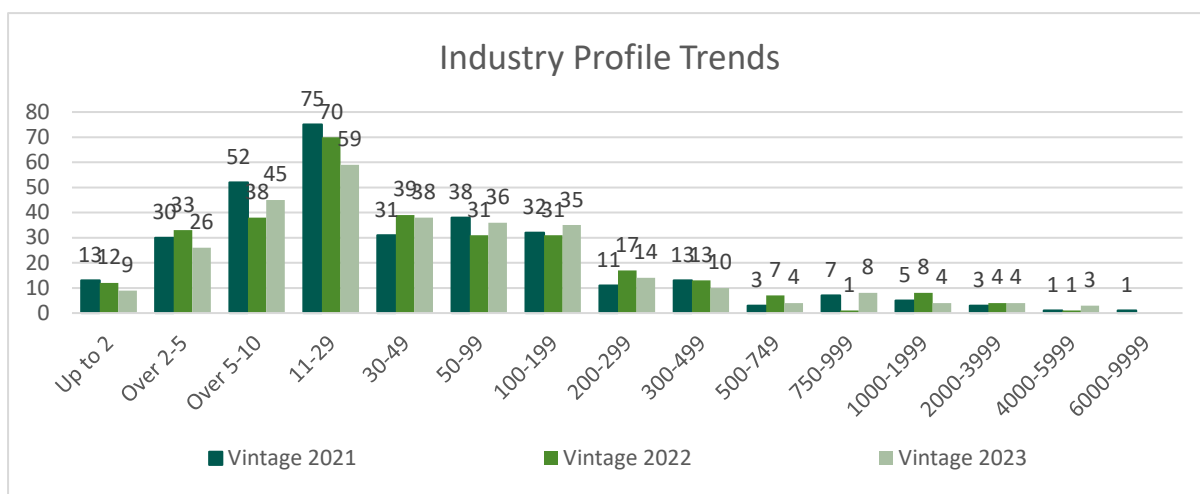
Wine Producers' Committee: Vintage 2023 Snapshot

Red Variety	Vintage 2018	Vintage 2019	Vintage 2020	Vintage 2021	Vintage 2022	Vintage 2023	vs prior year
CABERNET SAUVIGNON	10,755.1	8,930.4	8,397.3	9,220.6	8,652.2	10,007.6	▶ 15.7%
SHIRAZ	10,414.9	7,748.0	7,591.6	8,381.7	10,035.1	8,632.7	▶ -14.0%
MERLOT	2,710.3	2,123.9	1,616.9	1,814.4	2,003.3	1,791.6	▶ -10.6%
PINOT NOIR	812.2	621.2	695.4	910.8	841.5	948.1	▶ 12.7%
MALBEC	839.9	515.9	507.6	572.5	556.7	612.8	▶ 10.1%
TEMPRANILLO	487.0	303.4	409.6	484.5	530.5	892.7	▶ 68.3%
GRENACHE	279.9	424.1	317.2	462.9	428.6	545.4	▶ 27.2%
OTHER	164.9	109.6	253.4	197.4	158.2	242.9	▶ 53.5%
CABERNET FRANC	232.8	150.7	212.5	171.2	176.3	183.5	▶ 4.1%
PETIT VERDOT	230.8	167.5	149.4	143.1	150.9	167.4	▶ 10.9%
SANGIOVESE	67.1	48.0	52.7	84.8	194.4	138.2	▶ -28.9%
ZINFANDEL	62.8	49.4	47.6	48.2	82.7	64.0	▶ -22.6%
MOUVEDRE	57.0	23.0	41.6	42.7	49.5	54.2	▶ 9.4%
NEBBIOLO	34.1	27.0	26.7	34.4	27.5	38.9	▶ 41.1%
BARBERA	14.3	11.3	9.7	23.5	19.8	32.0	▶ 61.6%
DURIF	20.6	14.0	16.4	15.5	15.1	20.1	▶ 33.5%
GRACIANO	3.7	9.9	9.4	11.5	8.4	11.8	▶ 41.0%
PINOT MEUNIER	0.8	1.8	3.0	10.6	6.9	6.0	▶ -13.0%
NERO D'AVOLA	6.0	8.7	8.3	9.1	9.3	8.8	▶ -5.6%
GAMAY	1.9	3.8	3.9	8.8	12.6	12.7	▶ 0.8%
DOLCETTO	3.6	3.7	4.5	4.3	5.0	4.3	▶ -13.9%
MONTEPULCIANO	0.4	0.5	0.5	2.8	5.2	8.0	▶ 53.9%
SAPERAVI	1.9	1.8	1.9	2.4	1.2	2.4	▶ 89.9%
LAGREIN	1.4				0.1	3.4	▶ 2173.2%
CHAMBOURCIN						11.3	
BRACHETTO	1.0	1.6	1.2	2.3	1.3	2.4	▶ 80.9%
TANNAT	5.8	1.0	1.0	2.2	0.7	1.0	▶ 37.5%
MEUNIER	0.7	0.6	0.2	1.4	1.9		
AGLIANICONE			0.1	0.7		3.4	
RED (TOTAL)	27,210.9	21,300.9	20,379.8	22,664.1	23,974.9	24,447.4	2.0%

WA Industry Profile

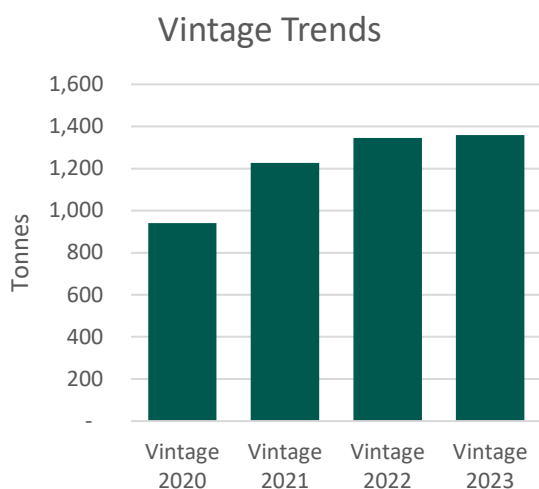


- For the 2023 vintage, there were 295 wine producers who reported and remitted FFS on behalf of 518 growers. Despite the increase in tonnage, industry participation contracted slightly against the prior year vintage (305 wine producers supplied by 524 growers).
- Tonnage ranges that saw an increase in the number of wine producers are shown in the graph above in green, with decreases in participation are shown in navy blue.



Regional Snapshots

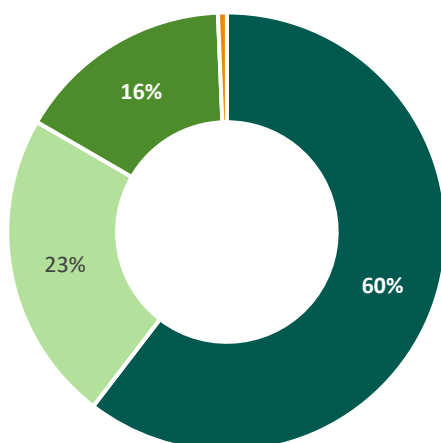
Blackwood Region



Blackwood region production held steady against the prior year vintage at 1,358 tonnes, consolidating the growth seen between 2020 and 2022.

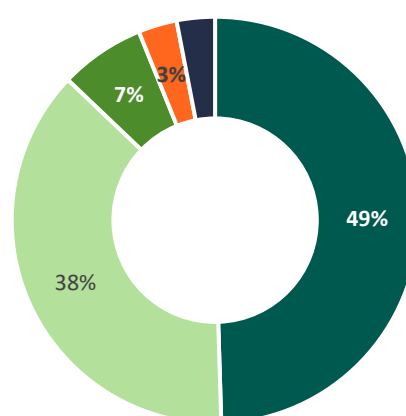
The 2023 vintage saw an increase in both the number of growers [2023:21; 2022:16] and the number of wine producers reporting their use of Blackwood grapes [2023:23; 2022:20].

Vintage 2023 White Varieties (> 5 tonnes)



■ SAUVIGNON BLANC
■ SEMILLON
■ CHARDONNAY
■ VIOGNIER

Vintage 2023 Red Varieties (> 5 tonnes)

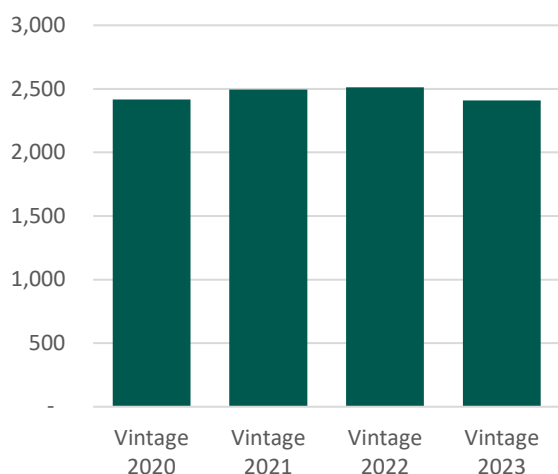


■ SHIRAZ
■ CABERNET SAUVIGNON
■ MERLOT
■ TEMPRANILLO
■ MALBEC

- White varieties dominate production at 901 tonnes (against 458 tonnes of red).
- Vintage 2023 saw reported production of white varieties grow by 16% (124 tonnes). This is substantially driven by an increase in sauvignon blanc production both in terms of tonnage [2023: 540 tonnes; 2022:385 tonnes] and share of white production [2023: 60%; 2022: 50%]
- By contrast, there was a drop in reported red production of 20% (112 tonnes) driven by lower shiraz [2023: 225 tonnes; 2022: 295 tonnes] and merlot [2023: 31 tonnes; 2022: 90 tonnes].

Geopraphe Region

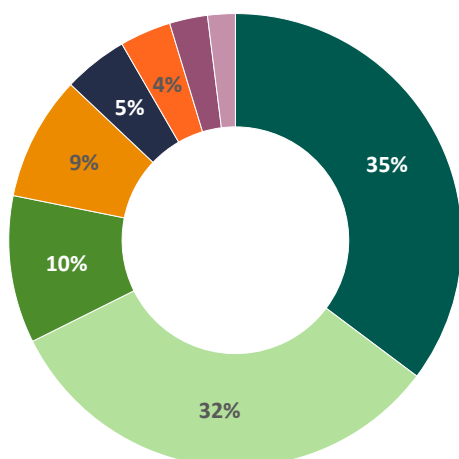
Vintage Trends



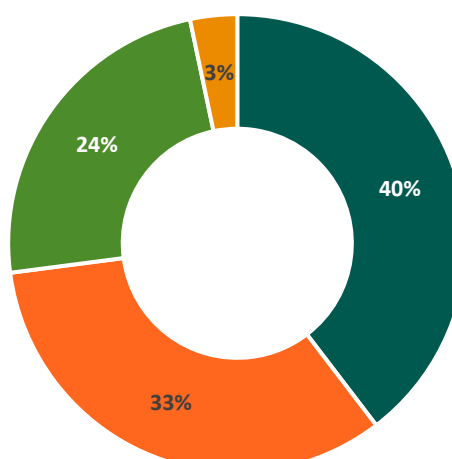
The 2023 vintage saw a 4% decline in reported production overall at 2,410 tonnes. Total tonnage was also marginally under the four-year average of 2,458 tonnes.

With red varieties holding steady with 1% growth [2023: 1,478 tonnes; 2022: 1,461 tonnes], the decline in regional production was driven by white varieties (down 11% to 932 tonnes). This drop is against the statewide trend (+ 11%) and represents the lowest level of reported white production in the region in four years.

Vintage 2023 Red Varieties (>20 tonne)



Vintage 2023 White Varieties (>20 tonne)

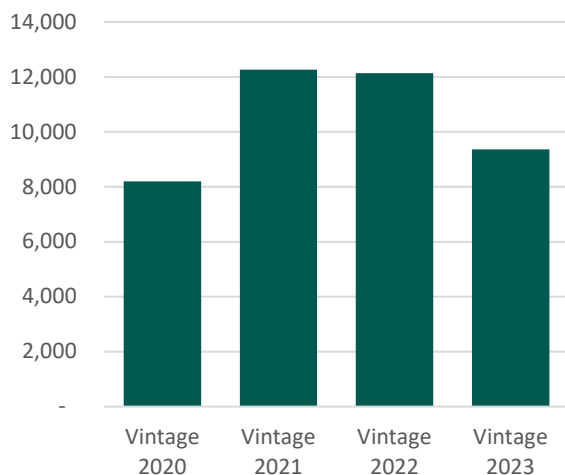


SHIRAZ	CABERNET SAUVIGNON	CHARDONNAY	SEMILLON
TEMPRANILLO	MERLOT		
GRENACHE	MALBEC	SAUVIGNON BLANC	RIESLING
SANGIOVESE	BARBERA		

- Despite red production holding steady overall, there was a substantial year-on-year drop in shiraz (-24%) which exceeded the State trend (- 14%) [2023: 489 tonnes; 2022: 642 tonnes].
- The 152-tonne reduction in in shiraz was offset by 33% growth in cabernet sauvignon [2023: 450 tonnes; 2022: 340 tonnes] and tempranillo [2023: 146 tonnes; 2022: 117 tonnes].
- In whites, the softening was driven by a 107 tonne (35%) reduction in sauvignon blanc, which dropped below semillon in production volume for the first time in four years.

Great Southern Region

Vintage Trend

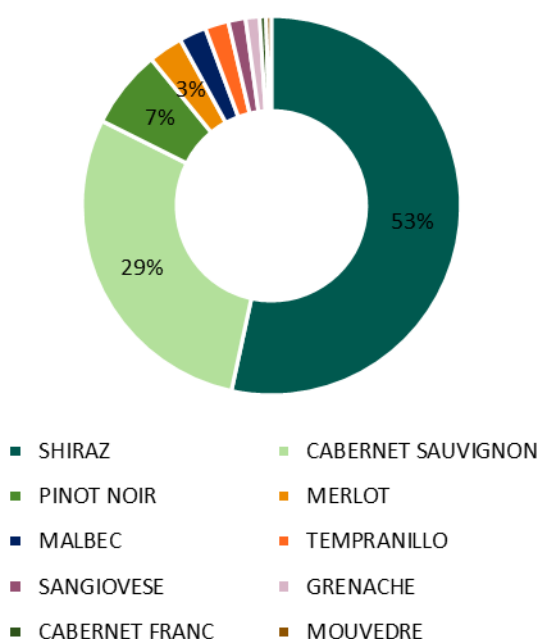


The 2023 vintage saw Great Southern region reported production dropping the gains seen in 2021 and 2022, with a 2,769-tonne reduction (23%). The result was 7% under the five-year average for the region.

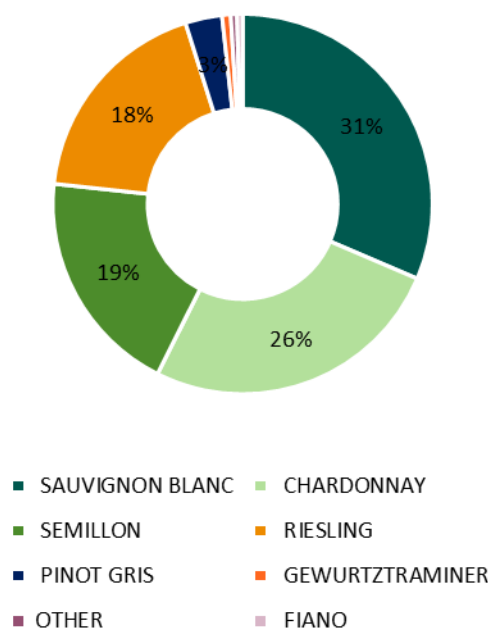
Going against State trends, tonnage reductions were seen across both reds (-26%) and whites (-18%).

2023 also saw the lowest number of wine producers reporting use of grapes from Great Southern region, at 73 wine producers (2022: 81). Included in the net decrease were 6 who did not produce wines at all for V23 (nil return) and 8 producers who reported for 2023 with grapes from other regions (predominately MR).

Vintage 2023 Red Varieties
(>20 tonnes)



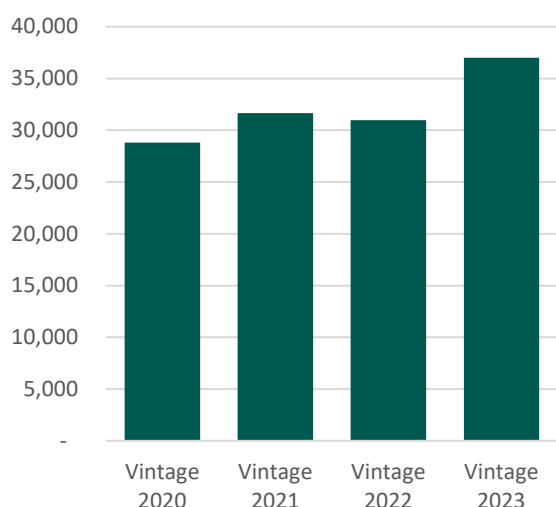
Vintage 2023 White Varieties
(>20 tonnes)



- With 1,277 tonnes less (35%), shiraz hit a four-year low and lead the drop in reds. Material reductions were also seen in cab sav (-432 tonnes / 22%), merlot (-75 tonnes / 22%), and malbec (-34 tonnes/ 22%).
- The only material offset to the losses in the major reds was a near doubling of tempranillo at 264 tonnes.
- Like 2022, there were volume reductions for every one of the top six white varieties for the region. This included the four main varieties – sauvignon blanc (-22%), chardonnay (-23%), semillon (-10%) and riesling (-10%).

Margaret River Region

Vintage Trend

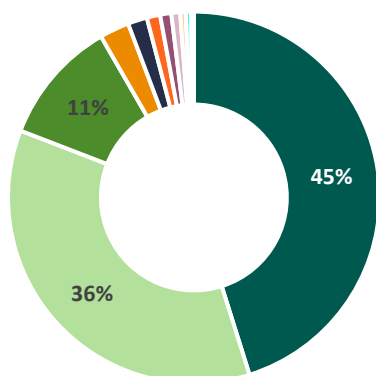


It was a record year for Margaret River since APC reporting began, with 36,997 tonnes reported. This represents an increase of 19% over the prior year, and 15% above the five-year average.

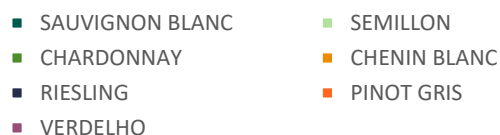
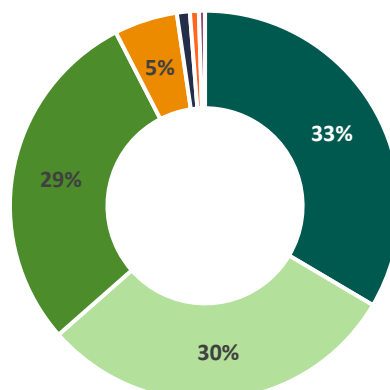
Margaret River saw the highest growth rate in whites in the state, with 21% (state trend: 11%). The growth of reds also outperformed the state trend at 17% against a trend of 2%. Given that Margaret River accounted for 54% of State red production for V23, this is no small achievement.

Production volume per industry participant grew, with the number of Margaret River growers (290) and number of wine producers reporting MR grapes (169) both lower for vintage 2023.

Vintage 2023 Red Varieties (>50 tonnes)



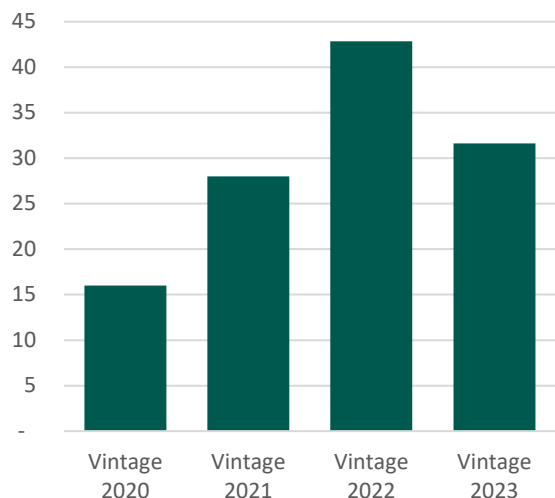
Vintage 2023 White Varieties (>50 tonnes)



- Cabernet Sauvignon - the most produced red for the region - hit a record high of 7,569 tonnes. This is up from 5,950 for the previous vintage. For V23, the Margaret River region supplied 76% of the State's cabernet sauvignon production.
- The Margaret River region also bucked the statewide trend to report a 282 tonne (6%) increase in shiraz.
- Sauvignon blanc, semillon and chardonnay continue to account for 92% of overall white production. Chardonnay led the growth in whites with a substantial 35% (1,475 tonne) increase, leading it to reclaim the position as the second most produced white variety.

Peel Region

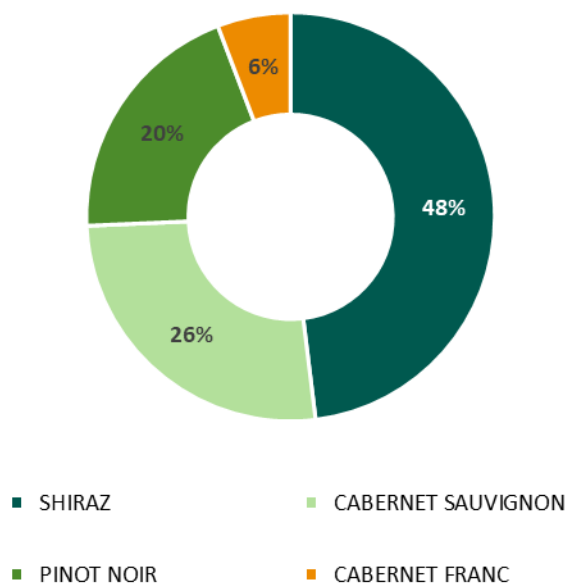
Vintage Trend



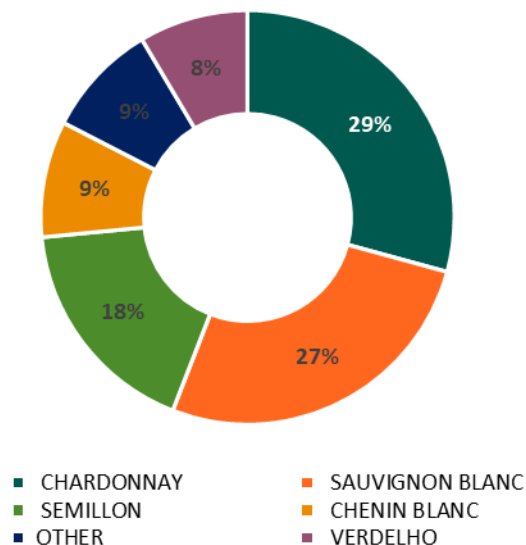
Vintage 2023 saw the Peel region return to a production level in line with the five-year average, recording 32 tonnes [2022: 43 tonnes].

The 10-tonne overall reduction came from red varieties [2023: 18 tonnes; 2022: 31 tonnes]

Vintage 2023 Red Varieties (> 1 tonne)



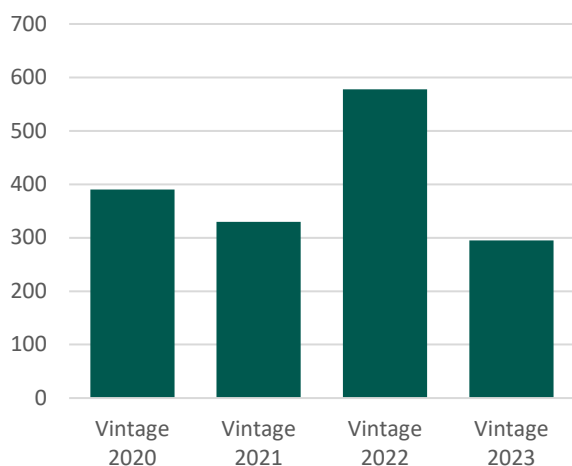
Vintage 2023 White Varieties (>1 tonne)



- Shiraz was the largest variety by production volume at 8.6 tonnes, followed by cabernet sauvignon at 4.7 tonnes.
- There was growth in the whites, with chardonnay the largest white variety by production volume at 3.9 tonne, only marginally ahead of sauvignon blanc (3.6 tonne).
- Despite the low number of regional growers (4 for vintage 2023), the region reported some 11 different varieties.

Perth Hills Region

Vintage Trend

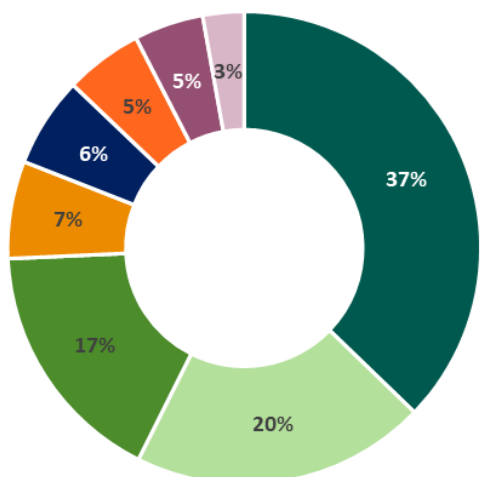


After a record result driven by shiraz in 2022, the Perth Hills region saw a substantial contraction to its lowest production in five years. At 295 tonnes, production was down 49% against vintage 2022, and 22% on the five-year average.

Despite being one of the smallest regions by production volume, the Perth Hills remains a diverse region with some 31 different varieties reported.

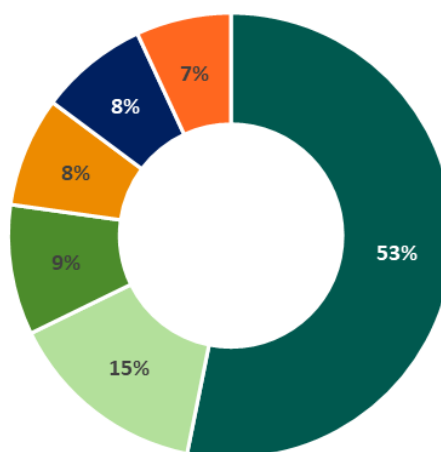
With 28 growers for the region, and 28 wine producers, the overall industry participation is consistent with vintage 2019 levels.

Vintage 2023 Red Varieties (>5 tonne)



■ SHIRAZ
 ■ GRENACHE
 ■ TEMPRANILLO
 ■ OTHER
 ■ CABERNET SAUVIGNON
 ■ MERLOT
 ■ PINOT NOIR
 ■ DURIF

Vintage 2023 White Varieties (>5 tonne)

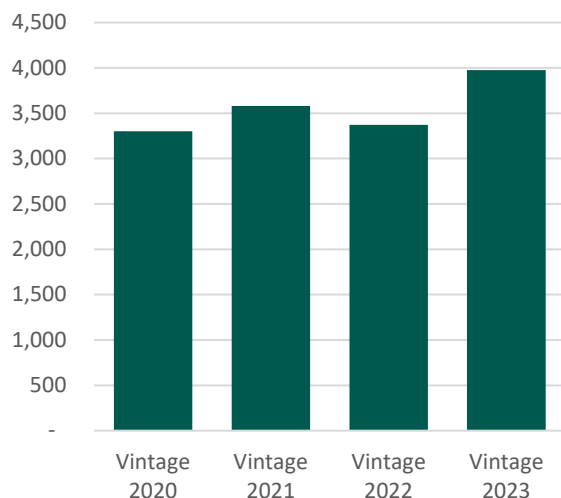


■ CHARDONNAY
 ■ SEMILLON
 ■ VERDELHO
 ■ VIOIGNIER
 ■ VERMINTINO
 ■ OTHER

- The sharp decline in reds by more than half was driven by shiraz [2023: 70 tonnes; 2022: 246 tonnes], cabernet sauvignon [2023: 38 tonnes; 2022: 66 tonnes], petit verdot [2023: 4 tonnes; 2022: 18 tonnes], and merlot [2023: 12 tonnes; 2022: 22 tonnes].
- Vintage 2023 also saw production of white varieties drop by 40% (57 tonnes). The most substantial reduction was in chenin blanc [2023: 1.5 tonnes; 2022: 40 tonnes].

Swan Valley Region

Vintage Trend

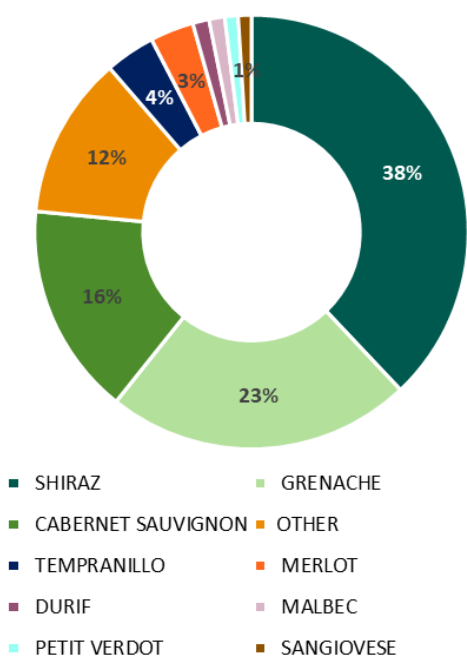


The Swan Valley region saw its highest level of production in the last five years at 3,974 tonnes. This was an increase against the 2022 vintage of 18% (601 tonnes), a stronger result than the statewide trends.

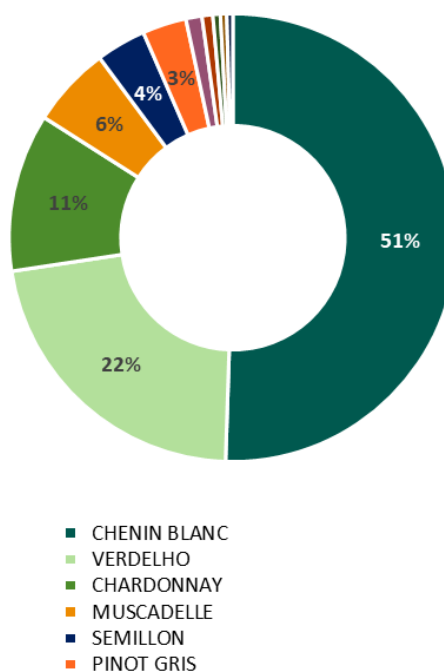
There was growth in both reds (19%) and whites (17%), marking the region as having one of the highest levels of year-on-year growth for vintage 2023.

Vintage 2023 also saw growth in industry participation, with an increase both in the number of growers in the region as well as the number of wine producers reporting use of Swan Valley grapes.

Vintage 2023 Red Varieties (>10 tonne)



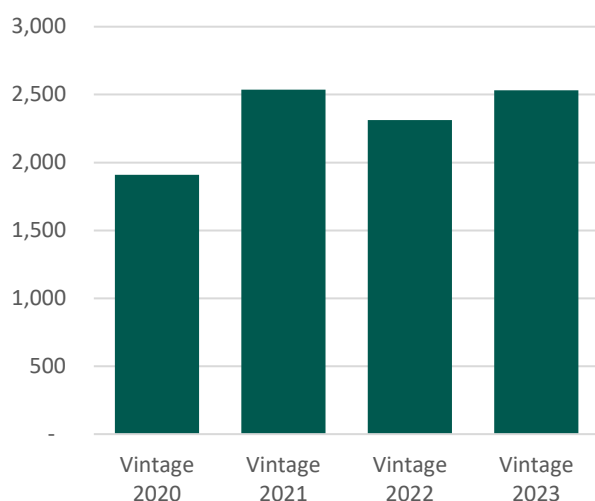
Vintage 2023 White Varieties (>10 tonne)



- Red varieties were relatively stable across the board and underpinned by strong growth in grenache [2023: 270 tonnes; 2022: 228 tonnes] and cabernet sauvignon [2023: 187 tonnes; 2022: 142 tonnes].
- White production increased by 411 tonnes to 2,768 tonnes. A 229 tonne rise in verdelho production, and 178 tonnes increase in chenin blanc production drove these gains.
- Sixty-four percent of the State's chenin blanc came from the Swan Valley region for vintage 2023.

Southern Forests Region

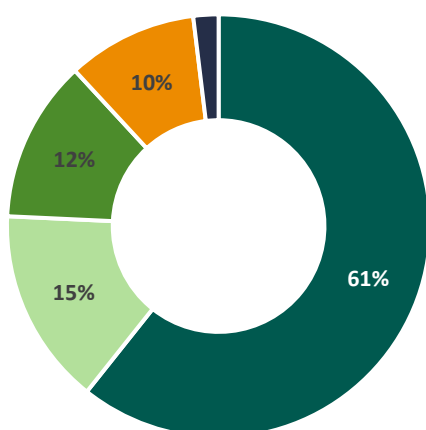
Vintage Trend



The Southern Forests region saw a 9.4% increase in production for vintage 2023 – rebounding somewhat from the softer 2022 vintage. At 2,531 tonnes, vintage 2023 is 4% above the five-year average [avg: 2,464 tonnes], however growth was softer than the State trends.

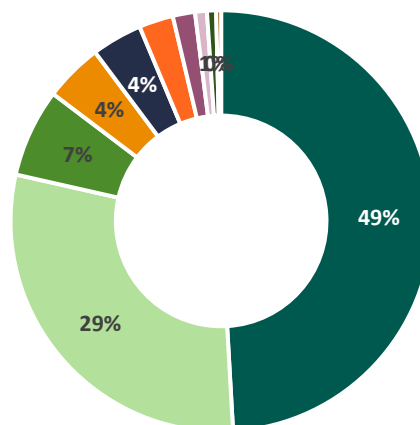
Industry participation was stable, with a slight increase in the number of growers in the region (29) and a consistent number of wine producers reporting use of Southern Forests Region grapes (34).

Vintage 2023 Red Varieties
(>5 tonne)



■ PINOT NOIR
 ■ SHIRAZ
 ■ CABERNET SAUVIGNON
 ■ MERLOT
 ■ PETIT VERDOT

Vintage 2023 White Varieties
(>5 tonne)



■ SAUVIGNON BLANC
 ■ CHARDONNAY
 ■ PINOT GRIS
 ■ PROSECCO
 ■ SEMILLON
 ■ SAVIGNIN BLANC
 ■ OTHER
 ■ RIESLING
 ■ GEWURTZTRAMINER
 ■ ARNEIS

- Seventy-nine percent of total production was attributable to white varieties [whites: 1,997 tonnes; reds: 534 tonnes].
- There was increase in white production of 6% (118 tonnes). Prosecco contributed the largest tonnage gains, jumping from 38 tonnes in 2022 to 89 tonnes in 2023. This was followed by semillon [2023: 77 tonnes; 2022: 53 tonnes].
- The biggest increases in reds were attributable to growth in pinot noir from 228 tonnes for V22 to 311 tonnes for V23.

ANNEXURE 1: VINTAGE 2023 VARIETAL DATASET BY REGION

APC Wine Producers' Committee Blackwood Valley Vintage 2023			
Variety	Tonnage	Variety	Tonnage
SHIRAZ	224.8	SAUVIGNON BLANC	540.1
CABERNET SAUVIGNON	170.7	SEMILLON	205.1
MERLOT	30.7	CHARDONNAY	142.9
TEMPRANILLO	14.0	VIOGNIER	5.8
MALBEC	13.8	VERMINTINO	4.0
GRENACHE	2.2	SAVIGNIN BLANC	2.0
BARBERA	1.0	MUSCAT BLANC A PETITS GRAINS	0.6
RED TOTAL	458	WHITE TOTAL	901

APC Wine Producers' Committee Geographe Vintage 2023			
Variety	Tonnage	Variety	Tonnage
SHIRAZ	489.4	CHARDONNAY	339.0
CABERNET SAUVIGNON	450.2	SEMILLON	285.1
TEMPRANILLO	146.1	SAUVIGNON BLANC	203.1
MERLOT	123.5	RIESLING	28.4
GRENACHE	63.9	VERMINTINO	15.7
MALBEC	50.9	OTHER	14.6
SANGIOVESE	37.6	CHENIN BLANC	13.1
BARBERA	27.4	ARNEIS	11.3
OTHER	19.9	VERDELHO	6.3
ZINFANDEL	19.7	FIANO	5.7
MOUVEDRE	16.9	VIOGNIER	4.0
GAMAY	11.0	MUSCAT BLANC A PETITS GRAINS	3.9
PETIT VERDOT	4.9	SCHEUREBE	2.2
NEBBIOLO	4.8		
DOLCETTO	4.3		
MONTEPULCIANO	2.6		
NERO D'AVOLA	1.8		
GRACIANO	1.4		
PINOT NOIR	0.9		
BRACHETTO	0.4		
RED - TOTAL	1477.5	WHITE TOTAL	932.4

APC Wine Producers Committee Great Southern Vintage 2023						
Variety		Tonnage		Variety	Tonnage	
SHIRAZ		2329.1		SAUVIGNON BLANC		1292.9
CABERNET SAUVIGNON		1524.5		CHARDONNAY		1049.1
PINOT NOIR		453.8		SEMILLON		912.9
TEMPRANILLO		264.2		RIESLING		872.5
MERLOT		124.1		PINOT GRIS		136.8
MALBEC		122.0		GEWURTZTRAMINER		26.4
GRENACHE		82.0		FIANO		23.5
SANGIOVESE		25.0		ARNEIS		10.8
MOUVEDRE		24.9		GRUNER VELTLINER		8.8
CABERNET FRANC		22.8		VERMINTINO		7.6
OTHER		17.2		VIOGNIER		7.1
NEBBIOLO		13.0		OTHER		2.4
PETIT VERDOT		6.7		MUSCAT BLANC A PETITS GRAINS		0.6
PINOT MEUNIER		4.4				
RED TOTAL		5013.7		WHITE TOTAL		4351.6

APC Wine Producers Committee Margaret River Vintage 2023			
Variety	Tonnage		Tonnage
CABERNET SAUVIGNON	7569.4	SAUVIGNON BLANC	7104.7
SHIRAZ	4985.1	CHARDONNAY	6845.8
MERLOT	1411.3	SEMILLON	5839.3
TEMPRANILLO	412.0	CHENIN BLANC	769.3
MALBEC	407.5	SAVIGNIN BLANC	100.5
PINOT NOIR	168.4	PINOT GRIS	209.8
CABERNET FRANC	153.4	RIESLING	183.3
PETIT VERDOT	129.5	OTHER	111.7
GRENACHE	96.0	VIOGNIER	83.9
SANGIOVESE	58.3	VERDELHO	55.1
OTHER	53.5	VERMINTINO	39.3
ZINFANDEL	31.7	VERDEJO	33.0
NEBBIOLO	14.8	MUSCAT BLANC A PETITS GRAINS	31.7
CHAMBOURCIN	11.3	MUSCADELLE	25.5
MOUVEDRE	9.6	FIANO	20.6
GRACIANO	6.9	GEWURTZTRAMINER	6.8
AGLIANICONE	3.4	ALBARINO	2.8
LAGREIN	2.6	SCHEUREBE	2.2
BARBERA	1.8	ROUSSANNE	2.1
GAMAY	1.7		
TANNAT	1.0		
MONTEPULCIANO	0.5		
RED TOTAL	15529.9	WHITE TOTAL	21467.1

APC Wine Producers Committee Peel Vintage 2023

Variety	Tonnage		Variety	Tonnage
SHIRAZ	8.6		CHARDONNAY	3.9
CABERNET SAUVIGNON	4.7		SAUVIGNON BLANC	3.6
PINOT NOIR	3.5		SEMILLON	2.4
CABERNET FRANC	1.0		CHENIN BLANC	1.2
ZINFANDEL	0.3		OTHER	1.2
			VERDELHO	1.2
TOTAL	18.1		TOTAL	13.5

APC Wine Producers' Committee Perth Hills Vintage 2023

Variety	Tonnage		Variety	Tonnage
SHIRAZ	69.5		CHARDONNAY	39.6
CABERNET SAUVIGNON	37.6		VERDELHO	10.9
GRENADE	31.5		VERMINTINO	7.0
MERLOT	12.4		SEMILLON	5.9
TEMPRANILLO	11.5		VIOGNIER	5.9
PINOT NOIR	9.9		OTHER	5.1
OTHER	8.9		VERDEJO	3.1
DURIF	5.3		PEDRO XIMENEZ	1.7
PETIT VERDOT	4.4		GEWURTZTRAMINER	1.6
MALBEC	3.7		CHENIN BLANC	1.5
ZINFANDEL	3.1		FIANO	1.4
SANGIOVESE	2.1		PINOT GRIS	1.1
NERO D'AVOLA	1.9		TRAMINER	0.4
BARBERA	1.8			
NEBBIOLO	1.8			
BRACHETTO	1.6			
MOUVEDRE	1.5			
MONTEPULCIANO	1.4			
RED TOTAL	209.9		WHITE TOTAL	85.2

Wine Producers' Committee: Vintage 2023 Snapshot

APC Wine Producers' Committee Swan Valley Vintage 2023			
Variety	Tonnage	Variety	Tonnage
SHIRAZ	449.3	CHENIN BLANC	1381.2
GRENACHE	269.7	VERDELHO	603.7
CABERNET SAUVIGNON	186.9	CHARDONNAY	312.0
OTHER	143.5	MUSCADELLE	159.2
TEMPRANILLO	44.1	SEMILLON	98.4
MERLOT	38.5	PINOT GRIS	86.9
DURIF	14.5	FIANO	31.8
MALBEC	13.8	OTHER	21.3
PETIT VERDOT	11.7	VERMINTINO	14.8
SANGIOVESE	11.7	PEDRO XIMENEZ	12.7
NERO D'AVOLA	5.1	MUSCAT BLANC A PETITS GRAINS	11.8
ZINFANDEL	4.2	SAVIGNIN BLANC	9.0
GRACIANO	3.5	TREBBIANO	6.7
MONTEPULCIANO	3.5	VIOGNIER	5.4
CABERNET FRANC	3.1	ALBARINO	5.3
SAPERAVI	2.0	RIESLING	4.0
MOUVEDRE	1.3	GEWURTZTRAMINER	2.0
PINOT NOIR	0.3	SAUVIGNON BLANC	1.6
RED TOTAL	1206.6	WHITE TOTAL	2767.6

APC Wine Producers' Committee Wine Industry Southern Forest (Manjimup/Pemberton) Vintage 2023			
Variety	Tonnage	Variety	Tonnage
PINOT NOIR	311.2	SAUVIGNON BLANC	977.2
SHIRAZ	77.1	CHARDONNAY	586.0
CABERNET SAUVIGNON	63.5	PINOT GRIS	134.7
MERLOT	51.0	PROSECCO	89.2
PETIT VERDOT	9.9	SEMILLON	77.3
ZINFANDEL	4.9	SAVIGNIN BLANC	52.4
NEBBIOLO	4.5	OTHER	34.0
SANGIOVESE	3.5	RIESLING	18.0
CABERNET FRANC	3.2	GEWURTZTRAMINER	14.0
PINOT MEUNIER	1.6	ARNEIS	7.5
MALBEC	1.1	VERDELHO	4.6
TEMPRANILLO	0.8	GRUNER VELTLINER	1.8
LAGREIN	0.8	VIOGNIER	0.3
BRACHETTO	0.4	FIANO	0.3
SAPERAVI	0.4		
RED TOTAL	533.9	WHITE TOTAL	1997.5