Wine Australia Market Insights

Region snapshot 2025-26 - Coonawarra

State **South Australia**

Published **July 2026**

Plantings

Source: National Vineyard Scan 2020 and ABS 2015	Coonawarra	All regions
Total vineyard area (hectares)	5,784	155,442
Percentage red varieties	92%	64%
Percentage of national vineyards	4%	
Percentage of South Australia vineyards	7%	

Crush

Source: National Vintage Survey 2026	Coonawarra	All regions
Estimated tonnes crushed in 2026	37,083	1,265,671
Average yield (tonnes/ha)	6.4	8.1
Change in crush from 2025	5%	-19%

Top five varieties in Coonawarra in 2026	Share of region tonnes	Share of national tonnes
Cabernet Sauvignon	60%	12%
Shiraz	21%	19%
Merlot	7%	4%
Chardonnay	6%	23%
Sauvignon Blanc	3%	9%

Exports

Source: Wine Export Approvals year ending June 2026

Exports by GI content	Coonawarra	All exports
Export volume by GI content ('000 litres)	6,238	598,298
Percentage of total exports	1.0%	100%
Percentage of crush exported (estimate)	24%	68%

Label claim exports (bottled only)	Coonawarra and Coonawarra blends	Year over year change
Export volume by GI label claim ('000 litres)	2,131	-7%
Export value by GI label claim ($A '000)	50,342	18%
Average value per litre	$23.62	27%

Share of bottled export volume by destination market (top 6 markets for region)	Coonawarra and Coonawarra blends	All bottled wine exports
China mainland	37%	15%
UK	17%	9%
Canada	9%	12%
New Zealand	6%	8%
Singapore	6%	4%
Hong Kong	5%	4%
Remaining markets	20%	48%

Share of bottled export volume by price point	Coonawarra and Coonawarra blends	All bottled wine exports
$2.49 and under	0%	2%
$2.50 to $4.99	5%	57%
$5.00 to $7.49	23%	18%
$7.50 to $9.99	16%	6%
$10.00 to $14.99	18%	7%
$15.00 to $19.99	5%	2%
$20 and over	33%	8%

Climate data

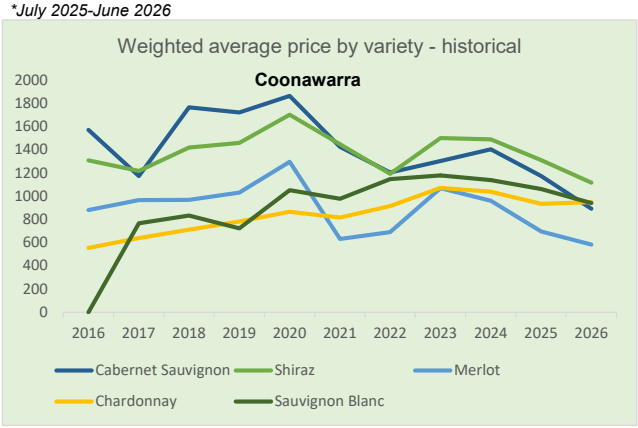
Source: Bureau of Meteorology (2026)

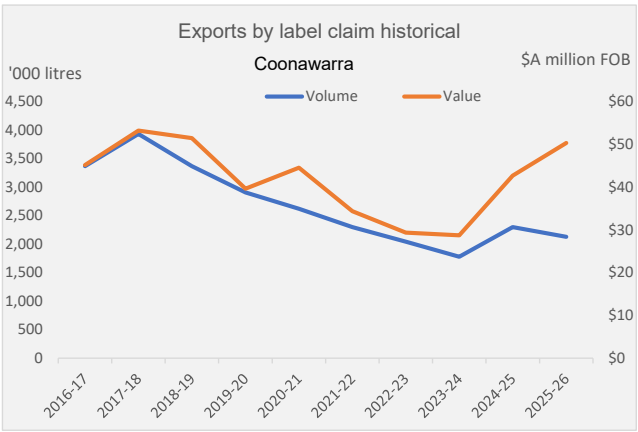
Coonawarra

Size (km^2) 400 Elevation (m) 51-127 Sth latitude -37.47

Time period	Mean Jan temp (MJT)	Annual* rainfall	GSR	Oct-April GDD
1961-1990 average	19.4 ºC	632 mm	248 mm	1441
2006-2025 average	20.6 ºC	595 mm	239 mm	1571
2025-26 season*	21.6 ºC	672 mm	256 mm	1484

**July 2025-June 2026*





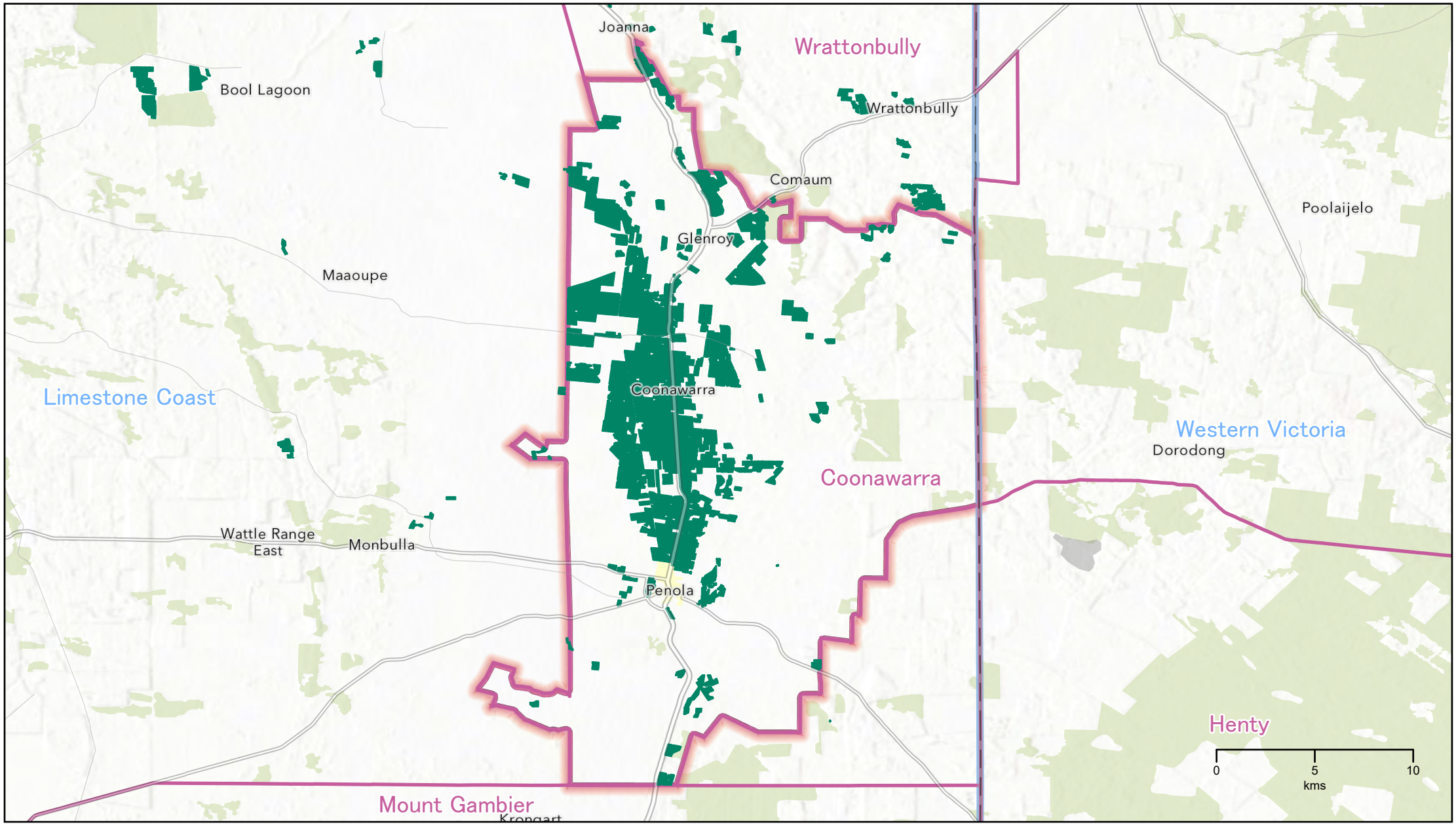


Notes

Meteorological data is taken from the national climate databank of the Bureau of Meteorology: the Australian Data Archive for Meteorology (ADAM).
Climate indices have been calculated across the whole GI region by the Antarctic Climate Ecosystem CRC as part of a research project co-funded by Wine Australia.
Growing season rainfall (GSR) and growing degree days (GDD) are both calculated from October to April across the whole GI region. GSR and GDD for individual vineyards will vary from this value.
Latitude data is the centroid of each GI region. Altitude/elevation data is the highest and lowest point in the region - regardless of whether there is a vineyard at that location.
Area data comes from the National Vineyard Scan 2020 conducted by GAIA on behalf of Wine Australia. Variety share from ABS vineyard survey 2015.
Estimated crush figures are higher than the figures reported in the National Vintage Report as the estimated figure is raised to allow for the non-response rate.
Exports by GI content includes all wine that has been identified by the exporter as coming from the GI, but not necessarily claimed on the label.
Label claim exports are those where the GI region is identified on the label. GI region content is based on the region reported by the winery in the product description.

COONAWARRA

South Australia



Wine Australia for Australian Wine

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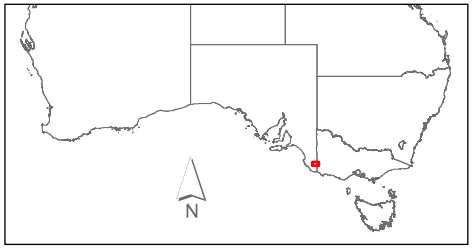
Vineyard boundaries: created and supplied by GAIA for the National Vineyard Scan 2019. Visit gaia.ag for more information. This information is reproduced with the permission of GAIA Innovations

Geographic Indications (GI) boundaries: Wine Australia (excluding South Australia where they are provided with permission by Vine Health Australia). Further information can be found at www.wineaustralia.com/labelling/register-of-protected-gis-and-other-terms/geographical-indications

Base map sources: Esri, HERE, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community © Commonwealth of Australia (Geoscience Australia) 2016.

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Map produced by Locatable Solutions Pty Ltd, June 2020



GI Regions
GI Zones
Vineyards (GAIA 2019)

This map provides a visual representation of the Geographical Indication (GI) boundary defined in the textual description for this GI. The textual description is the legal definition of the GI and in case of any discrepancy or ambiguity, the textual description prevails.

GAIA agricultural intelligence