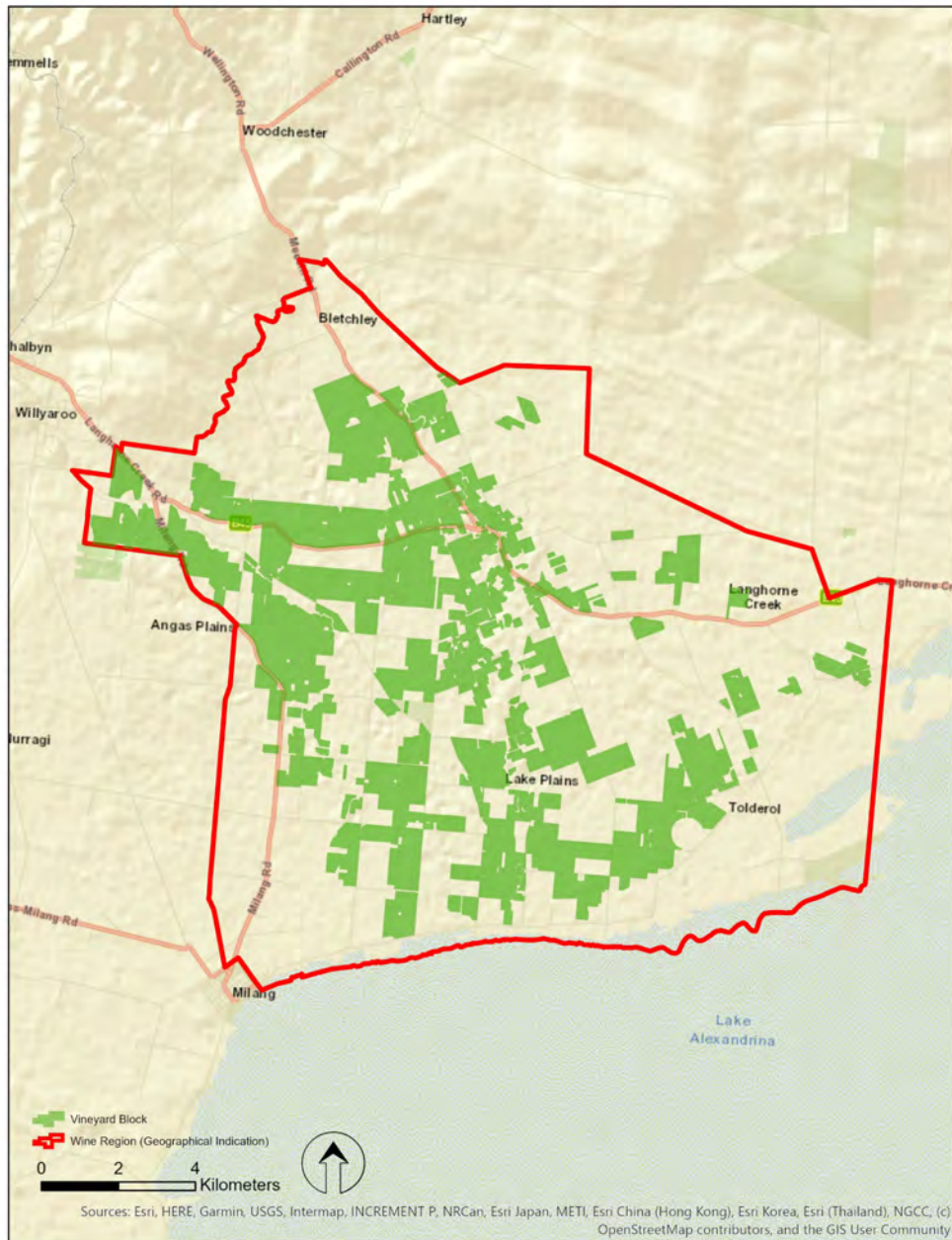


SA Winegrape Crush Survey 2021

Regional Summary Report

Langhorne Creek Wine Region

Wine Australia July 2021



DATUM: GDA2020
PROJECTION: SA Lambert
DATE: 28 November 2019
SOFTWARE: ESRI ArcGIS v10.7.1
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia

Langhorne Creek Wine Region



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Langhorne Creek

Vintage overview

VINTAGE REPORT

In Langhorne Creek early winter rainfall was light but regular. While the vines did not get a deep drink, grass growth was good and cover crops (including hay) grew beautifully. This was very useful ground cover and mulch to retain moisture given the dry late-winter, spring and early summer.

The warm and dry spring was challenging for irrigation but good for flowering, aiding good fruit set in all varieties leading to relatively even berry development, making harvest decisions easy. The summer was generally quite cool, but two intensely hot periods 10-12th of January and again the 24th & 25th of January led to sunburn and crop loss from shrivel in some blocks. Showery rain in January and February helped nurse the vines through to harvest.

As usual, cooling breezes from 'The Lake' helped to maintain excellent natural acidity, with Langhorne Creek nights considerably cooler than all other central regions, including all but the coolest parts of the Adelaide Hills.

The pace of the vintage was steady and many wineries continued crushing through until mid-April. The steady harvest pattern allowed full ripeness for medium and full-bodied wines with most red fruit being ready for harvest with good colour, tannin and acidity at 12.5-13.5 Baumé. The cool vintage additionally resulted in varietally expressive, balanced whites with excellent natural acid retention.

The above average yields more than made up for last year's short fall, and the even fruit set and berry development led to excellent vine balance.

The star variety this season is Cabernet Sauvignon. Wine quality at this early stage is as good as we have experienced in Langhorne Creek, probably on par with 2012 and 2016. The fresh fruit flavour apparent in the wines now is magnificent.

Lian Jaensch – Langhorne Creek Grape and Wine Incorporated

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Langhorne Creek was 53,523 tonnes in 2021, more than double the very low crop in 2020. Over the past five years (up to 2020), the average crush for Langhorne Creek has been 46,259 tonnes, making this year's crush 16 per cent above the five-year average.

There were 51 respondents to the survey who reported crushing grapes from Langhorne Creek in 2021, compared with 49 in 2020.

The total estimated value of winegrapes from Langhorne Creek in 2021 was \$50.7 million compared with \$27 million in 2020, an increase of 86 per cent. The increase in production was partly offset by an overall decrease in the average purchase value of grapes, which decreased by 16 per cent from \$1137 per tonne in 2020 to \$953 per tonne.

There were decreases in average value for the major red varieties: Shiraz down by 17 per cent to \$1037 per tonne, Cabernet Sauvignon down 21 per cent to \$961 per tonne and Merlot down by 22 per cent to \$776 per tonne. Average values for white varieties increased: Chardonnay up 4 per cent to \$669 per tonne, Pinot Gris/Grigio up 6 per cent to \$991 and Sauvignon Blanc up 10 per cent to \$862 per tonne.

The price dispersion data shows a downward shift in prices, with 62 per cent of grapes purchased at \$900-\$1500 per tonne compared with 79 per cent in 2020.

According to Vinehealth Australia data, the total vineyard area in Langhorne Creek as at 30 April 2021 is 5996 hectares, compared with 5924 hectares in 2020. The total area is around 200 hectares more than it was 5 years ago.

There were 46 hectares of new plantings in Langhorne Creek in the 2020-21 planting season, all of which were Shiraz or Cabernet Sauvignon.

Langhorne Creek

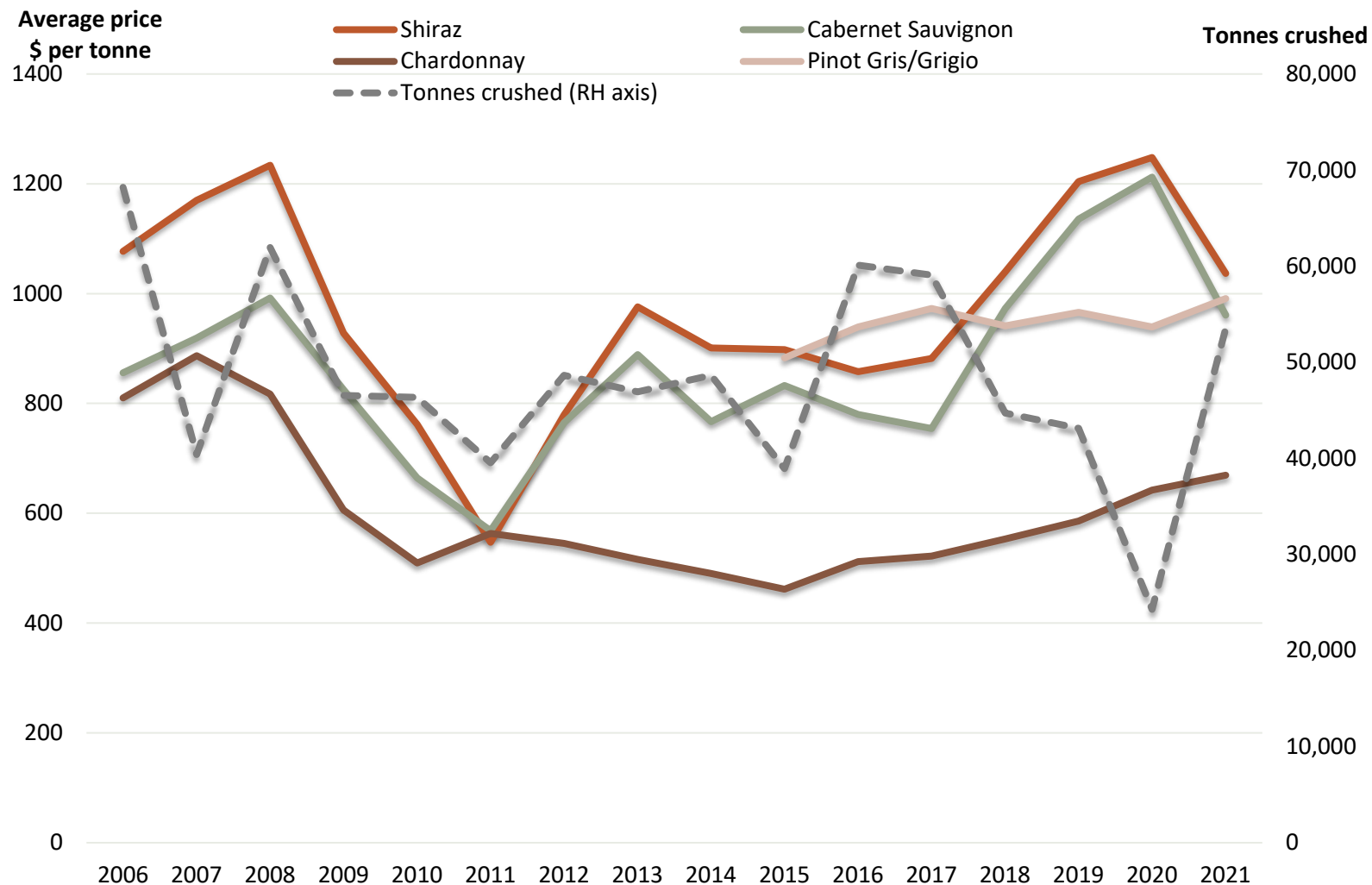
Winegrape intake summary table

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	% change in average value	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Total value all grapes
Red								
Barbera	15	\$16,974	\$1,101	0%			15	\$16,974
Cabernet Franc	8				18	69%	26	\$26,080
Cabernet Sauvignon	10,206	\$9,795,676	\$961	-21%	4,903	32%	15,109	\$14,506,868
Durif	12				336	96%	349	\$331,389
Graciano					7	100%	7	\$13,396
Grenache	133	\$132,373	\$994	13%	882	87%	1,015	\$1,009,611
Lagrein	49	\$53,091	\$1,079	0%			49	\$53,091
Malbec	353	\$456,212	\$1,292	1%	35	9%	388	\$501,759
Mataro/Mourvedre	53				12	18%	65	\$66,283
Merlot	2,316	\$1,797,302	\$776	-22%	2,081	47%	4,398	\$3,412,236
Montepulciano	3				21	87%	24	\$55,993
Nero d'Avola					1	100%	1	\$2,936
Petit Verdot	57				37	39%	93	\$90,164
Pinot Meunier	95						95	\$85,896
Pinot Noir	753	\$757,310	\$1,005	2%	380	34%	1,133	\$1,139,348
Ruby Cabernet					7	100%	7	\$7,000
Sangiovese	139	\$179,379	\$1,287	7%	12	8%	152	\$195,417
Shiraz	15,214	\$15,783,481	\$1,037	-17%	6,350	29%	21,565	\$22,371,412
Tempranillo	35	\$37,859	\$1,092	0%	5	13%	40	\$43,527
Touriga Nacional	16						16	\$27,900
Other red	91	\$77,940	\$853	7%	2	2%	93	\$82,205
Red Total	29,551	\$29,337,605	\$993	-18%	15,090	34%	44,641	\$44,039,483
White								
Chardonnay	4,010	\$2,682,510	\$669	4%	522	12%	4,532	\$3,031,865
Fiano	11				4	29%	15	\$26,255
Muscat à petits grains blancs	17				14	46%	31	\$20,280
Pinot Gris/Grigio	668	\$662,347	\$991	6%	166	20%	834	\$827,047
Riesling	71				2,041	97%	2,112	\$1,590,761
Sauvignon Blanc	712	\$614,306	\$862	10%	453	39%	1,166	\$1,005,064
Verdelho	15				48	76%	63	\$50,628
Vermentino	63	\$82,867	\$1,318	0%	9	13%	72	\$94,997
Viognier	56						56	\$36,556
White Total	5,623	\$4,173,786	\$742	4%	3,259	37%	8,882	\$6,683,453
Grand Total	35,174	\$33,511,391	\$953	-16%	18,349	34%	53,523	\$50,722,936

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

Langhorne Creek

Historical weighted average price vs tonnes crushed



Langhorne Creek

Price dispersion – purchased grapes

Varieties	Tonnes purchased in each price segment					Total tonnes purchased
	<\$600	\$600-<\$900	\$900-<\$1500	\$1500-<\$2000	>\$2000	
Red						
Barbera			15			15
Cabernet Franc			8			8
Cabernet Sauvignon	238	2,494	7,418		56	10,206
Durif			12			12
Grenache		82	41	10		133
Lagrein	8		42			49
Malbec		7	275	67	4	353
Mataro/Mourvedre			53			53
Merlot		1,836	480			2,316
Montepulciano					3	3
Petit Verdot			57			57
Pinot Meunier			95			95
Pinot Noir		60	693			753
Sangiovese			139			139
Shiraz	1,018	2,438	11,392	90	277	15,214
Tempranillo			35			35
Touriga Nacional				16		16
Other red		54	37			91
Red Total	1,263	6,972	20,794	182	340	29,551
White						
Chardonnay	747	3,263				4,010
Fiano				11		11
Muscat à petits grains blancs		17				17
Pinot Gris/Grigio			668			668
Riesling		71				71
Sauvignon Blanc		318	395			712
Verdelho		15				15
Vermentino			63			63
Viognier		56				56
White Total	747	3,740	1,126	11		5,623
Total purchased	2,010	10,712	21,919	193	340	35,174

Langhorne Creek

Current plantings by variety and year planted

Variety	Pre-2018	2018	2019	2020	Total area	planted in 2020
Red winegrapes						
Cabernet Franc	9	0	0	0	9	0%
Cabernet Sauvignon	1,950	38	23	12	2,023	1%
Dolcetto	8	0	0	0	8	0%
Durif (Petite Sirah)	7	0	0	0	7	0%
Grenache	78	0	0	0	78	0%
Lagrein	10	0	0	0	10	0%
Malbec	106	0	0	0	106	0%
Mataro (Mourvedre)	8	0	0	0	8	0%
Merlot	375	0	0	0	375	0%
Petit Verdot	10	0	0	0	10	0%
Pinot Noir	100	0	0	0	100	0%
Sangiovese	15	0	0	0	15	0%
Shiraz	2,251	61	13	34	2,359	1%
Tempranillo	5	0	0	0	5	0%
Zinfandel	7	0	0	0	7	0%
Other Red	20	0	0	0	20	0%
Total red varieties	4,959	99	36	46	5,140	1%
White winegrapes						
Chardonnay	463	0	0	0	463	0%
Fiano	9	0	2	0	11	0%
Pinot Gris	50	0	0	0	50	0%
Riesling	160	0	0	0	160	0%
Sauvignon Blanc	75	0	0	0	75	0%
Semillon	1	0	0	0	1	0%
Verdelho	8	0	0	0	8	0%
Other White	32	0	0	0	32	0%
Total white varieties	798	0	2	0	800	0%
Rootstock Block	6	0	0	0	6	0%
Unknown variety	50	0	0	0	50	0%
Total all varieties	5,813	99	38	46	5,996	1%

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 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 is 89 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 or associated vineyards ("own grown") and from independent vineyards ("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 2021).

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, or variables that go into individual contracts.

Price dispersion data (shaded columns in Intake Summary tables)

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 not collected by the Australian National Vintage Survey. The information 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 2021 and include all plantings from the 2020–21 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 topworked, 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.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.



Acknowledgements

AUSTRALIAN NATIONAL VINTAGE SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association, Wine Grape Growers South Australia and Primary Industries and Regions 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>

About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), 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 RDA investments.

Credits

Images – Wine Australia

GI maps – Vinehealth Australia

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.

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