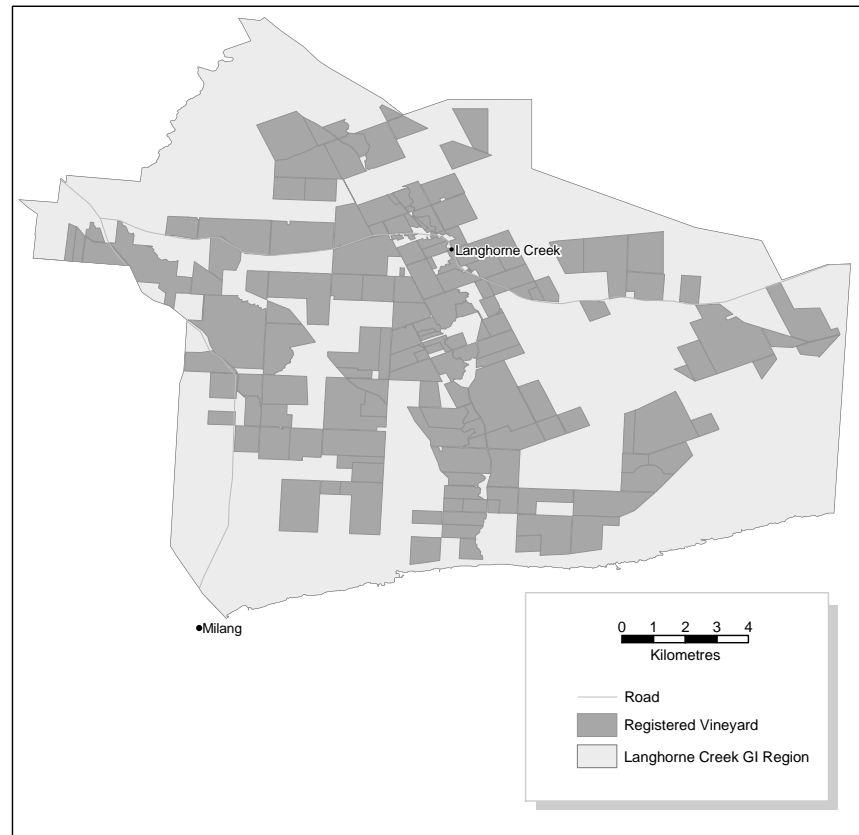


LANGHORNE CREEK VINTAGE OVERVIEW

Vintage report

The Langhorne Creek season started well for those on the flood plain, with two good flood events during the growing season. Some frost events occurred, followed later in the growing season by two extreme heat days, and this presented some challenges to the region, but otherwise it was a dry season with very low disease pressure.

Vintage started early and was constant with some reports of Shiraz and Cabernet Sauvignon intake overlapping and creating a little pressure on winery fermentation space.



Yields were a bit variable with above average yield for many on the flood plain and slightly below average in other areas. Yields look like averaging out to compare well with previous years.

Good, even ripening with good flavour development characterized the season. Flavour developed at a reasonable baume level with some reporting optimum fruit flavour at a slightly higher baume than in previous years. Acid levels have been quite low. Shiraz is again looking great with excellent fruit ripeness and depth of balance. A superb, quality vintage for Cabernet Sauvignon and parcels of Petit Verdot and Malbec. Cabernet Sauvignon in particular looks back to its best showing fabulous structure, colour – rich and black – and flavour. Chardonnay is reportedly the best in several years.

John Pargeter

Langhorne Creek Grapegrowers' Association

Overview of vintage statistics

Langhorne Creek had another record vintage in 2004, producing 54,360 tonnes. This region has shown steady growth from less than 10,000 tonnes in 1996. Despite this, record tonnages in the Barossa, McLaren Vale and Coonawarra meant that Langhorne Creek lost its position (from 2003) as the second largest producing region after the Riverland and dropped to fifth. There was still a shortfall in Chardonnay, but Shiraz and Cabernet Sauvignon were oversupplied compared with wineries' requirements.

Reflecting this result, the average purchase value of Shiraz and Cabernet Sauvignon was down by around \$200 per tonne, while the average purchase value of Chardonnay increased very slightly.

The forecast is for intake of red varieties to grow to around 55,000 tonnes next year and remain at approximately that level. In last year's survey the reported demand for 2008 was 68,000 tonnes; this year that figure has been revised downward to 56,000 tonnes. On the other hand, forecast demand for white varieties has been revised upward by 3,000 tonnes in each forecast year. Overall the region is expected to grow to around 70,000 tonnes over the next five years.

Anticipated growth is reflected in the planting figures for the 2003 planting season. There were over 200 hectares (4%) planted; however, these were mainly in red varieties. Production estimates suggest that there is a further planting requirement of 300 hectares to meet intake requirements for 2009 in white varieties (see table 1.9).

LANGHORNE CREEK CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 9.1

Variety	Current area in hectares by year planted						Total area	% planted in 2003
	Pre-1999	1999	2000	2001	2002	2003		
RED WINEGRAPES								
CABERNET FRANC	18	3	0	0	0	0	20	0%
CABERNET SAUVIGNON	1639	193	65	75	36	24	2032	1%
GRENACHE	37	43	45	1	0	0	126	0%
MALBEC	21	20	1	0	1	0	44	0%
MATARO (MOUVEDRE)	0	8	0	0	0	0	8	0%
MERLOT	315	43	0	0	59	20	436	5%
NEBBIOLO	1	8	0	1	0	0	10	0%
PETIT VERDOT	40	10	4	1	0	0	54	0%
PINOT NOIR	40	0	0	0	7	6	53	11%
SANGIOVESE	42	6	5	0	1	0	54	0%
SHIRAZ	1434	204	60	155	39	101	1992	5%
OTHER RED	2	13	10	5	0	1	31	3%
TOTAL RED WINEGRAPES	3588	551	190	237	142	152	4860	3%
WHITE WINEGRAPES								
CHARDONNAY	272	16	6	98	202	47	641	7%
RIESLING	20	30	0	66	22	0	138	0%
SEMILLON	26	2	0	0	0	0	29	0%
TRAMINER	1	0	0	15	0	0	16	0%
VERDELHO	41	6	6	0	0	0	53	0%
VIIGNIER	1	13	0	0	1	9	24	39%
OTHER WHITE	11	3	0	0	2	0	16	2%
TOTAL WHITE WINEGRAPES	372	70	12	179	227	57	916	6%
TOTAL ALL VARIETIES	3960	620	202	416	369	209	5776	4%



LANGHORNE CREEK TONNES CRUSHED BY VARIETY - VINTAGE 2004

Table 9.2

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for		
							Own	Other	Preferred
RED									
Barbera	0	4	4	15	100%	29%	0	1	1
Cabernet Franc	60	37	97	58	38%	167%	3	2	3
Cabernet Sauvignon	6404	13927	20331	18203	69%	112%	13	22	28
Dolcetto	0	39	39	35	100%	110%	0	2	2
Grenache	690	481	1171	1171	41%	100%	7	3	7
Malbec	75	128	204	364	63%	56%	6	6	9
Mataro (Mouvedre)	0	30	30	0	100%		0	1	0
Merlot	1312	1982	3295	3163	60%	104%	10	13	16
Other red	7	2	9	14	35%	69%	1	1	2
Petit Verdot	255	201	456	496	44%	92%	9	4	11
Pinot Noir	408	85	493	472	17%	104%	3	2	4
Ruby Cabernet	0	8	8	8	100%	98%	0	1	1
Sangiovese	39	298	337	219	88%	154%	2	4	3
Shiraz	5504	15262	20767	17995	73%	115%	13	22	26
Touriga	0	20	20	28	100%	73%	0	1	1
Total RED	14755	32505	47260	42242	69%	112%			
WHITE									
Chardonnay	2050	2606	4657	6539	56%	71%	5	10	11
Chenin Blanc	22	0	22	22	0%	100%	1	0	1
Doradillo	0	12	12	12	100%	100%	0	1	1
Other white	8	9	17	8	0%	100%	1	0	1
Pinot Gris	0	26	26	36	100%	72%	0	2	2
Riesling	1266	47	1313	1318	4%	100%	3	3	4
Sauvignon Blanc	8	43	51	74	84%	69%	1	2	3
Semillon	0	341	341	346	100%	99%	0	2	3
Traminer	0	97	97	97	100%	100%	0	1	1
Verdelho	147	343	491	515	70%	95%	3	5	7
Viognier	36	38	74	113	52%	65%	3	3	6
Total WHITE	3537	3563	7100	9080	50%	78%			
Total for region	18292	36068	54360	51322					

LANGHORNE CREEK CROP VALUE DATA - VINTAGE 2004

Table 9.3

estimated total value

Variety	Grower grown	Total crushed (1)	purchased grapes	total grapes	lowest price (2)	highest price (2)	calc average purchase value per tonne (3)	
RED								
Barbera	4	4	\$6,188	\$6,188			\$1,400	100%
Cabernet Franc	37	97	\$25,612	\$66,791			\$690	100%
Cabernet Sauvignon	13927	20331	\$15,607,102	\$22,783,962	\$200	\$2,300	\$1,121	99%
Dolcetto	39	39	\$58,060	\$58,060			\$1,508	100%
Grenache	481	1171	\$541,317	\$1,317,014	\$400	\$1,260	\$1,125	100%
Malbec	128	204	\$139,013	\$220,566	\$500	\$1,650	\$1,083	100%
Mataro (Mouvedre)	30	30	\$33,418	\$33,418			\$1,099	100%
Merlot	1982	3295	\$2,092,580	\$3,477,939	\$348	\$1,772	\$1,056	100%
Other red (group together)	2	6	\$3,080	\$8,680			\$1,400	100%
Petit Verdot	201	456	\$214,434	\$487,009	\$900	\$1,950	\$1,067	100%
Pinot Noir	85	493	\$78,522	\$456,852			\$927	100%
Ruby Cabernet	8	8	\$6,630	\$6,630			\$850	100%
Sangiovese	298	337	\$449,436	\$508,505	\$500	\$1,772	\$1,508	100%
Shiraz	15262	20767	\$18,689,645	\$25,429,750	\$489	\$2,300	\$1,225	99%
Touriga	20	20	\$24,372	\$24,372			\$1,200	100%
Total RED	32505	47257	\$37,969,409	\$54,885,736				
WHITE								
Chardonnay	2606	4657	\$3,566,208	\$6,372,156	\$1,100	\$1,700	\$1,368	100%
Doradillo	12	12	\$2,109	\$2,109			\$176	100%
Palomino	9	9	\$2,601	\$2,601			\$289	100%
Pinot Gris	26	26	\$33,075	\$33,075			\$1,279	100%
Riesling	47	1313	\$38,736	\$1,081,883	\$200	\$1,150	\$824	100%
Sauvignon Blanc	43	51	\$46,877	\$55,527			\$1,081	100%
Semillon	341	341	\$275,030	\$275,030			\$805	100%
Traminer	97	97	\$77,280	\$77,280			\$800	100%
Verdelho	343	491	\$398,958	\$570,092	\$850	\$1,460	\$1,162	100%
Viognier	38	74	\$61,338	\$118,663	\$1,575	\$1,700	\$1,612	100%
Total WHITE	3563	7070	\$4,502,212	\$8,588,415				

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

(2) The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

(3) This does not include end use bonuses or other adjustments determined post-receival.



LANGHORNE CREEK ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2005 TO 2009

Table 9.4

Variety	2005		2006		2007		2008		2009	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	15	15	17	17	20	20	24	24	27	27
Cabernet Franc	93	44	93	44	93	44	44	44	44	44
Cabernet Sauvignon	23156	20629	23111	20818	23678	23142	22136	22691	21464	22735
Dolcetto	55	55	60	60	65	65	70	70	75	75
Grenache	1504	1494	1507	1497	1472	1517	1470	1527	1495	1761
Malbec	479	405	505	415	516	427	510	421	530	441
Mataro (Mouvedre)	15	15	15	15	25	25	60	60	100	100
Merlot	4483	4154	4715	4219	4820	4633	4488	4598	4337	4627
Nebbiolo	24	24	24	24	24	24	24	24	24	24
Other red	54	54	59	59	69	69	79	79	89	89
Petit Verdot	502	494	537	499	567	524	503	470	503	470
Pinot Noir	606	571	588	553	612	577	648	613	648	613
Sangiovese	555	294	570	294	570	294	310	294	310	294
Shiraz	23091	20224	23567	21493	24518	23438	25196	24758	24587	25269
Tempranillo	16	16	20	20	25	25	30	30	35	35
Touriga	52	52	60	60	60	60	0	0	0	0
Total for RED	54700	48539	55447	50086	57134	54882	55592	55702	54267	56603
WHITE										
Chardonnay	7173	8731	8541	10096	10114	11619	10737	11968	11420	12186
Chenin Blanc	22	22	22	22	22	22	22	22	22	22
Doradillo	7	0	7	0	7	0	7	0	7	0
Other white	23	8	23	8	23	8	23	8	23	8
Pinot Gris	40	56	65	111	75	116	80	121	85	126
Riesling	1535	1535	1968	1968	2203	1894	2203	1903	2203	1913
Sauvignon Blanc	83	83	70	70	80	80	90	90	130	130
Semillon	335	335	335	335	335	335	335	335	335	335
Traminer	126	126	162	162	162	162	0	0	0	0
Verdelho	665	665	690	690	715	715	622	622	622	622
Viognier	182	210	234	250	279	295	369	425	419	475
Total for WHITE	10191	11771	12117	13712	14015	15246	14488	15494	15266	15817
Total for region	64891	60310	67564	63798	71149	70128	70080	71196	69533	72420

LANGHORNE CREEK PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1992 - 2009

Figure 9.1

Past production and projections (major varieties)

