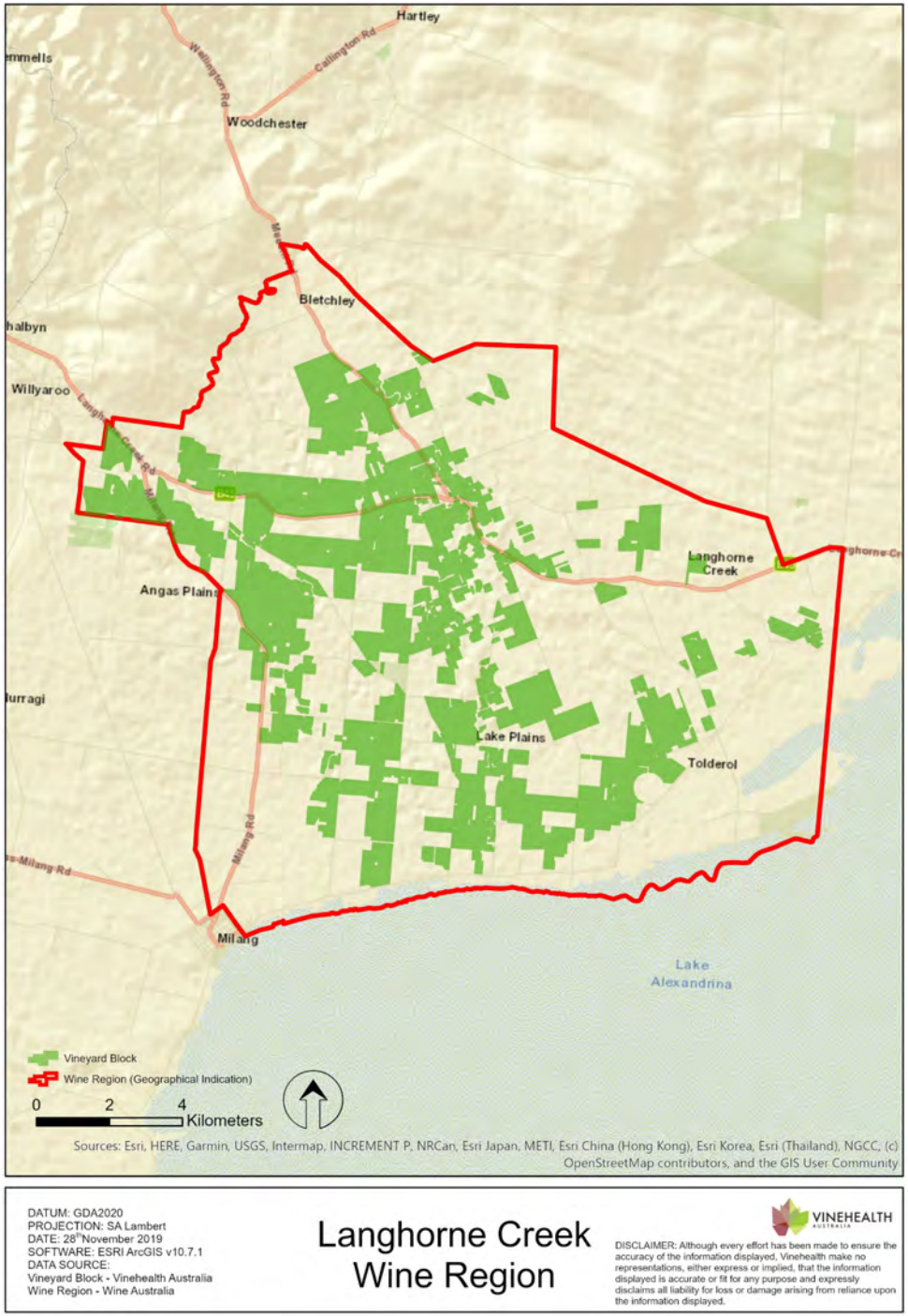


SA Winegrape Crush Survey 2022

Regional Summary Report

Langhorne Creek Wine Region

Wine Australia July 2022

Langhorne Creek

Vintage overview

VINTAGE REPORT

2022 has been one of the best vintages experienced in Langhorne Creek.

Mid-winter rainfall was above-average and a few riverside vineyards also received a small flood giving the soil a good soak. The rainfall ceased quickly in September, enough for a frost which affected some in the region.

The September frost and cold windy weather in Spring extended into the flowering period, presenting challenges. While yields (Shiraz in particular) were hampered by the conditions, the quality was not. Fortunately, a mild season overall and moderate crop levels saw fruit set even out through into a long ripening period. It was an unusually humid early Summer, thankfully with relatively mild temperatures. This led to a late burst of downy mildew, but the timing did not adversely affect crops. The generally cool Summer (thanks to La Niña) with minor rain in January and February helped to nurse the vines through to harvest. The region received below average rain but cool conditions from mid-February through to mid-April made life relatively easy.

As usual, cooling breezes across Lake Alexandrina helped to maintain excellent natural acidity. Extended periods of southerly air streams kept conditions cool with excellent flavour and acidity.

The Langhorne Creek vintage 2022 harvest kicked off in February with sparkling base and lively whites, hit its peak late March and into April with reds, and ran into the start of May before harvesters left the vineyards. It was a later start and longer vintage than the region has experienced for some years.

Cabernet is as always, a strong performer for the region but word is that Shiraz this year is giving Cabernet a run for its money. Some exciting quality has come from this vintage.

Lian Jaensch – Langhorne Creek Grape and Wine Incorporated

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Langhorne Creek was 36,394 tonnes in 2022, a reduction of 32 per cent compared with the 2021 vintage. Over the past five years (up to 2021), the average crush for Langhorne Creek has been 44,940 tonnes, making this year's crush 19 per cent below the five-year average.

There were 51 respondents to the survey who reported crushing grapes from Langhorne Creek in 2022, the same as in 2021.

The total estimated value of winegrapes from Langhorne Creek in 2022 was $30.6 million compared with $50.7 million in 2021, a decrease of 40 per cent. The smaller production was compounded by an overall decrease in the average purchase value of grapes, which decreased by 12 per cent from $953 per tonne in 2021 to $842 per tonne.

There were decreases in average value for the major red varieties: Cabernet Sauvignon was down 18 per cent to $961 per tonne, Shiraz was down 11 per cent to $927 per tonne, and Merlot was down 19 per cent to $626 per tonne. White varieties were mixed: Chardonnay was static at $671 per tonne, Sauvignon Blanc increased by 4 per cent to $897 per tonne and Pinot Gris/Grigio decreased by 3 per cent to $965 per tonne.

The price dispersion data shows a downward shift in prices, with 61 per cent of grapes purchased at less than $900 per tonne compared with 36 per cent in 2021.

According to Vinehealth Australia data, the total vineyard area in Langhorne Creek as at 30 April 2022 is 5972 hectares, compared with 5996 hectares in 2021. The total area is around 120 hectares more than it was 5 years ago.

There were just 15 hectares of new plantings in Langhorne Creek in the 2021-22 planting season, spread among red varieties (including 4 hectares of Malbec).

Langhorne Creek

Winegrape intake summary table – red varieties

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
Red								
Barbera	5						5	$6,807
Cabernet Franc	11				32	75%	43	$47,483
Cabernet Sauvignon	7,341	$5,778,389	$787	-18%	5,064	41%	12,404	$9,761,775
Durif	13				201	94%	214	$192,366
Graciano					5	100%	5	$10,109
Grenache	131	$135,083	$1,030	4%	853	87%	984	$1,013,507
Lagrein	26	$32,834	$1,252	16%			26	$32,834
Malbec	612	$748,482	$1,224	-5%	170	22%	781	$956,299
Mataro/Mourvedre	17				3	15%	20	$15,191
Merlot	1,546	$968,174	$626	-19%	1,867	55%	3,413	$2,137,246
Montepulciano	13				22	63%	35	$82,184
Nero d'Avola					1	100%	1	$1,593
Petit Verdot	27				25	48%	51	$42,203
Pinot Meunier	54						54	$48,618
Pinot Noir	440	$477,523	$1,086	8%	327	43%	767	$832,700
Sangiovese	139	$182,224	$1,310	2%	23	14%	162	$212,721
Shiraz	7,621	$7,061,583	$927	-11%	4,259	36%	11,880	$11,008,224
Tempranillo	14	$15,490	$1,082	-1%			14	$15,490
Touriga Nacional	16						16	$29,220
Other red	57	$53,275	$932	9%	6	9%	63	$64,048
Red Total	**18,083**	**$15,627,010**	**$864**	**-13%**	**12,857**	**42%**	**30,941**	**$26,510,617**

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

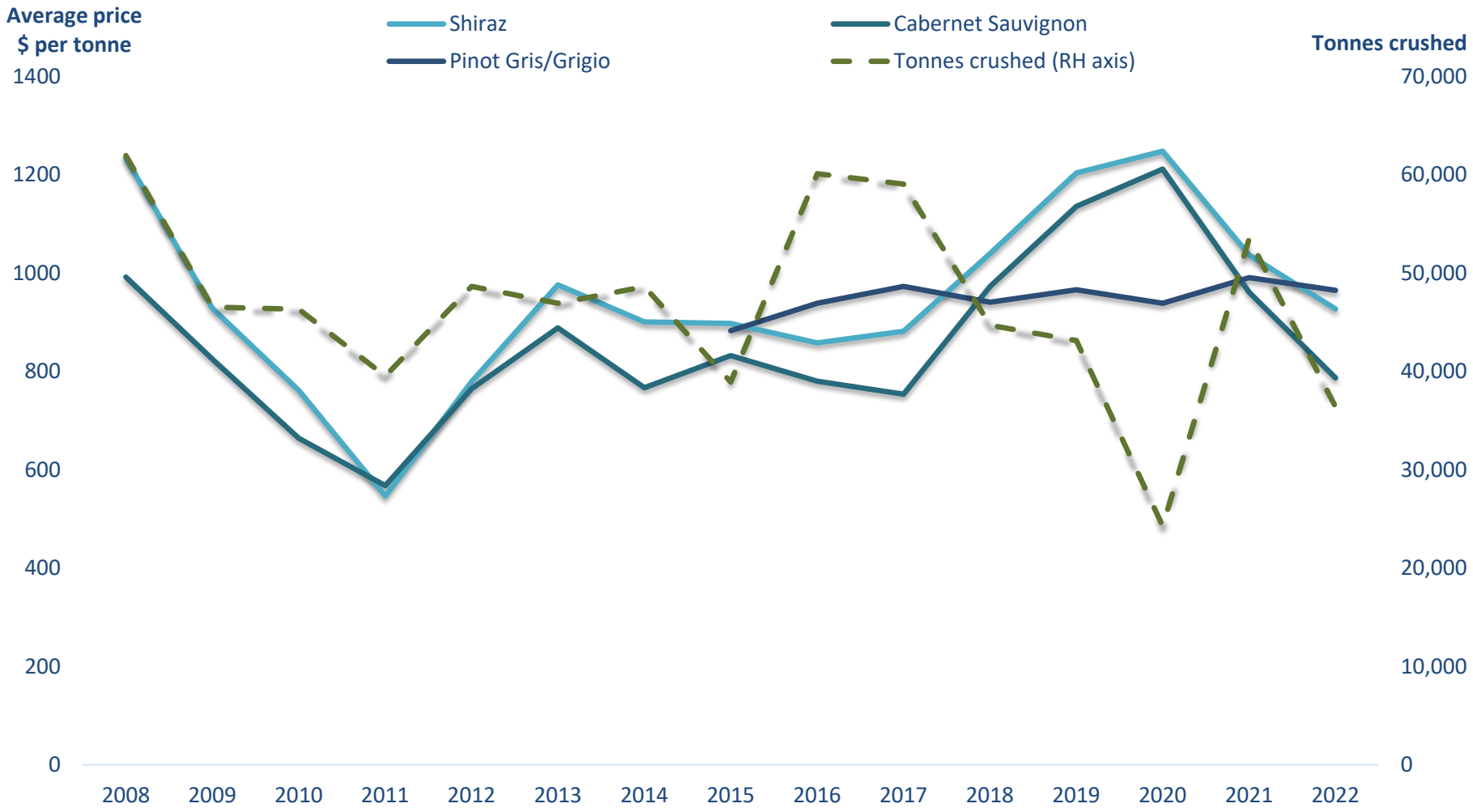
Winegrape intake summary table – white varieties

Varieties	Tonnes purchased	Total value purchased	Average purchase value per tonne	Change in price year on year	Winery grown fruit (tonnes)	Winery grown share of crush	Total crushed (tonnes)	Estimated total value all grapes
White								
Chardonnay	2,782	$1,867,807	$671	0%	546	16%	3,328	$2,234,263
Chenin blanc					3	100%	3	$2,937
Fiano	16	$29,585	$1,816	0%	5	23%	21	$38,310
Muscat à Petits Grains Blancs					12	100%	12	$13,260
Pinot Gris/Grigio	295	$284,412	$965	-3%	115	28%	409	$394,998
Riesling	79	$62,920	$796	0%	620	89%	699	$556,392
Sauvignon Blanc	437	$391,959	$897	4%	413	49%	850	$762,570
Verdelho					54	100%	54	$61,760
Vermentino	27				4	12%	31	$39,165
Viognier	47						47	$34,086
White Total	**3,683**	**$2,705,297**	**$734**	**-1%**	**1,770**	**32%**	**5,453**	**$4,137,740**
Grand Total	**21,767**	**$18,332,307**	**$842**	**-12%**	**14,627**	**40%**	**36,394**	**$30,648,357**

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

	Tonnes purchased in each segment					
Varieties	**<$600**	**$600-<$900**	**$900-<$1500**	**$1500-<$2000**	**>$2000**	**Total purchased**
Red						
Barbera			5			5
Cabernet Franc			11			11
Cabernet Sauvignon	1,788	2,943	2,497	50	62	7,341
Durif			13			13
Grenache			127		4	131
Lagrein			26			26
Malbec			485	127		612
Mataro/Mourvedre		15	2			17
Merlot	440	1,015	91			1,546
Montepulciano					13	13
Petit Verdot		25	2			27
Pinot Meunier			54			54
Pinot Noir			440			440
Sangiovese			139			139
Shiraz	1,291	2,605	3,398	209	118	7,621
Tempranillo			14			14
Touriga Nacional				16		16
Other red		24	33			57
Red Total	**3,519**	**6,627**	**7,338**	**402**	**197**	**18,083**
White						
Chardonnay	114	2,668				2,782
Fiano				11	6	16
Pinot Gris/Grigio			295			295
Riesling		79				79
Sauvignon Blanc		203	234			437
Vermentino			27			27
Viognier		34	13			47
White Total	**114**	**2,985**	**568**	**11**	**6**	**3,683**
Total purchased	**3,633**	**9,612**	**7,906**	**413**	**203**	**21,767**

Langhorne Creek

Current plantings by variety and year planted

	Area (hectares)					
Variety	**Pre-2019**	**2019**	**2020**	**2021**	**Total area (Ha)**	**% planted in 2021**
Red winegrapes						
Cabernet Franc	9	0	0	0	9	*0%*
Cabernet Sauvignon	1,975	23	11	5	2,014	*0%*
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	101	0	0	4	105	*4%*
Mataro (Mourvedre)	8	0	0	0	8	*0%*
Merlot	375	0	1	0	376	*0%*
Nero d'Avola	0	0	0	1	1	*100%*
Petit Verdot	10	0	0	0	10	*0%*
Pinot Noir	101	0	0	2	103	*2%*
Sangiovese	15	0	0	0	15	*0%*
Shiraz	2,290	13	37	3	2,343	*0%*
Tempranillo	5	0	0	0	5	*0%*
Zinfandel	7	0	0	0	7	*0%*
Other Red	24	0	0	0	24	*2%*
Total red varieties	**5,023**	**36**	**49**	**15**	**5,123**	***0%***
White winegrapes						
Chardonnay	462	0	0	0	462	*0%*
Fiano	9	2	0	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	29	0	0	0	29	*0%*
Total white varieties	**794**	**2**	**0**	**0**	**796**	***0%***
Rootstock Block	6	0	0	0	6	*0%*
Unknown variety	47	0	0	0	47	*0%*
Total all varieties	**5,870**	**38**	**49**	**15**	**5,972**	***0%***

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 receival – 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 2022).

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 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.

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- Planting data tables are current as at 30 April 2022 and include all plantings from the 2021–22 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 top-worked, 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

Note: data published in this report supercedes that in earlier reports. Minor variations in reported figures can occur due to data revisions.

Any questions about the report should be directed to:

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