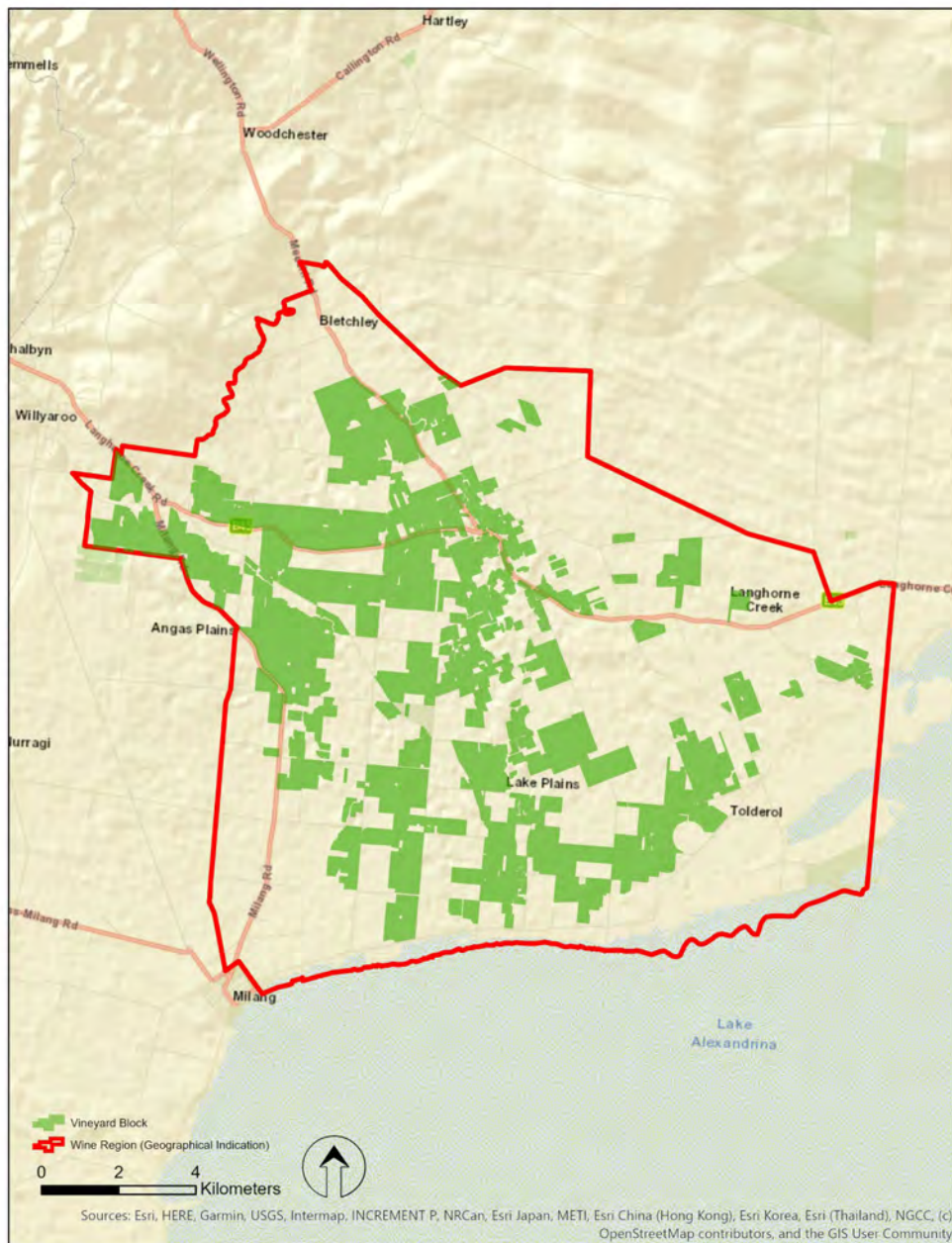


SA Winegrape Crush Survey 2023

Regional Summary Report

Langhorne Creek Wine Region

Wine Australia July 2023



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

It was a late, long, and tough vintage all round in 2023, but patience paid off and wines will shine from the Langhorne Creek 2023 vintage.

The growing season began on a foundation of above-average winter rainfall during June and July 2022, with a small measure of flooding in a few locations on the natural floodplain vineyards. During flowering the October rainfall tripled its monthly average and November rainfall was higher again than average for this time of year in the region.

A short flowering period was challenged by cold winds and rain during spring and some early flowering varieties were negatively impacted. Generally, fruit set in the region's key varieties, Shiraz, and Cabernet Sauvignon, was even but average to below-average in yield.

The harvest of white varieties started around two weeks later than usual in mid-February, with local reds following at least three weeks later around mid-March. The bulk of the region's fruit that was destined for harvest was taken in by mid to late April, and final loads moved out in the first week of May.

It is no secret that the 2023 vintage held significant challenges, not only from seasonal climatic conditions, but also market and supply/demand pressures across the industry which resulted in substantial quantities of red grapes, particularly Shiraz and Cabernet Sauvignon, not being taken this year. The good news lies in the quality of the fruit taken, with standout varieties from this year in Langhorne Creek being beautiful Cabernet Sauvignon and Grenache with some excellent Malbec and great parcels of Shiraz.

Lian Jaensch – Langhorne Creek Grape and Wine Incorporated – with thanks for additional input to Paul Hotker (Bleasdale Vineyards) and Rebecca Willson (Bremerton)

OVERVIEW OF VINTAGE STATISTICS

The reported crush of winegrapes from Langhorne Creek was 26,653 tonnes in 2023, a reduction of 27 per cent compared with the 2022 vintage. Over the past five years (up to 2022), the average crush for Langhorne Creek has been 40,407 tonnes, making this year's crush 34 per cent below the five-year average. It was the fifth-lowest reported crush since 1998.

There were 49 respondents to the survey who reported crushing grapes from Langhorne Creek in 2023, compared to 51 in 2022.

The total estimated value of winegrapes from Langhorne Creek in 2023 was \$22.9 million compared with \$30.6 million in 2022, a decrease of 25 per cent. The average purchase value of grapes increased by 1 per cent overall from \$842 per tonne in 2022 to \$852 per tonne.

The top red variety, Shiraz, was down by 3 per cent to \$899 per tonne whereas Cabernet Sauvignon was up by 2 per cent to \$803 per tonne. White varieties fared slightly better overall: Chardonnay was down by 1 per cent to \$666, Sauvignon Blanc increased by 19 per cent to \$1069 per tonne and Pinot Gris/Grigio increased by 10 per cent to \$1066 per tonne. The average value for Pinot Gris/Grigio has stayed higher than Shiraz and Cabernet Sauvignon for the second year in a row.

The price dispersion data shows a slight upward shift in prices, with 44 per cent of grapes purchased at more than \$900 per tonne compared with 39 per cent in 2022.

According to Vinehealth Australia data, the total vineyard area in Langhorne Creek as at 30 April 2023 is 5884 hectares, compared with 5972 hectares in 2022. The total area is around 52 hectares less than it was 5 years ago.

There were just 4 hectares of new plantings in Langhorne Creek in the 2022-23 planting season, of which 3 hectares were Cabernet Sauvignon.

Langhorne Creek

Winegrape intake summary table – red winegrapes

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	7						7	\$7,476
Cabernet Franc	5				3	41%	8	\$8,902
Cabernet Sauvignon	5,337	\$4,285,313	\$803	2%	1,592	23%	6,929	\$5,563,268
Durif	220						220	\$33,027
Graciano					7	100%	7	\$12,916
Grenache	149	\$149,627	\$1,004	-2%	653	81%	802	\$805,870
Lagrein	22						22	\$26,348
Malbec	484	\$564,648	\$1,167	-5%	115	19%	599	\$698,357
Mataro/Mourvedre	36				4	11%	41	\$25,828
Merlot	1,351	\$754,693	\$559	-11%	461	25%	1,812	\$1,011,966
Montepulciano	17	\$38,578	\$2,276	0%	11	39%	28	\$62,781
Nebbiolo					1	100%	1	\$1,426
Nero d'Avola	4				2	38%	6	\$10,657
Petit Verdot	23	\$19,459	\$847	0%	18	43%	41	\$34,437
Pinot Meunier	50						50	\$49,820
Pinot Noir	590	\$857,109	\$1,452	34%	323	35%	913	\$1,325,783
Sangiovese	114	\$152,366	\$1,341	2%	10	8%	123	\$165,224
Shiraz	7,057	\$6,342,365	\$899	-3%	2,415	26%	9,472	\$8,513,252
Tempranillo	30	\$46,694	\$1,538	42%	2	6%	32	\$49,770
Touriga Nacional	14						14	\$24,842
Other red	56	\$36,500	\$649	-30%	7	11%	63	\$49,187
Red Total	15,565	\$13,423,844	\$862	-0%	5,623	27%	21,188	\$18,481,137

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

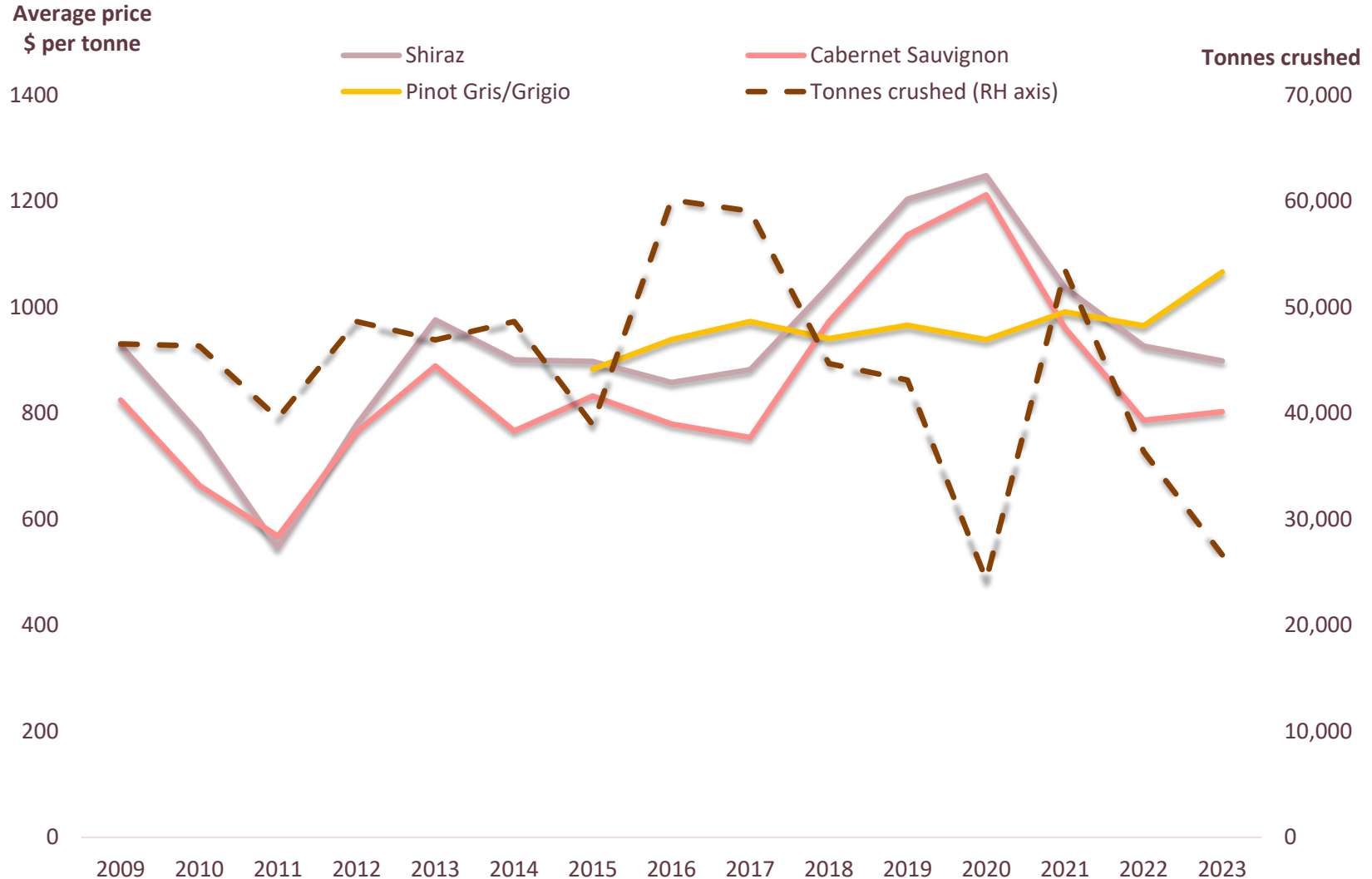
Winegrape intake summary table – white winegrapes

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	1,817	\$1,210,714	\$666	-1%	411	18%	2,228	\$1,484,238
Chenin blanc					4	100%	4	\$5,390
Fiano	20	\$35,135	\$1,781	-2%	6	22%	25	\$45,047
Marsanne					0	100%	0	\$517
Muscat à Petits Grains Blancs					11	100%	11	\$12,679
Pinot Gris/Grigio	317	\$337,862	\$1,066	10%	137	30%	454	\$483,611
Prosecco	4						4	\$7,215
Riesling	71				1,787	96%	1,857	\$1,485,912
Sauvignon Blanc	424	\$453,278	\$1,069	19%	307	42%	731	\$780,909
Verdelho					71	100%	71	\$85,238
Vermentino	45	\$48,286	\$1,082	0%	11	20%	56	\$60,366
Viognier	24						24	\$15,483
Other white					1	100%	1	\$2,027
White Total	2,721	\$2,164,645	\$796	8%	2,744	50%	5,465	\$4,468,631
Grand Total	18,286	\$15,588,489	\$852	1%	8,367	31%	26,653	\$22,949,768

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			7			7
Cabernet Franc			5			5
Cabernet Sauvignon	1,309	1,449	2,396	21	54	5,228
Durif	220					220
Grenache		6	141		2	149
Lagrein			22			22
Malbec	1	54	305	124		484
Mataro/Mourvedre		34	2			36
Merlot	694	617	40			1,351
Montepulciano					17	17
Nero d'Avola				4		4
Petit Verdot		19	4			23
Pinot Meunier			50			50
Pinot Noir			269	321		590
Sangiovese			104	10		114
Shiraz	1,420	2,305	3,120	140	71	7,057
Tempranillo			6	24		30
Touriga Nacional				14		14
Other red	24	16	16			56
Red Total	3,668	4,501	6,486	658	144	15,456
White						
Chardonnay	202	1,615				1,817
Fiano				14	6	20
Pinot Gris/Grigio			299	18		317
Prosecco				4		4
Riesling		71				71
Sauvignon Blanc		31	394			424
Vermentino			45			45
Viognier		24				24
White Total	202	1,741	737	35	6	2,721
Total purchased	3,869	6,241	7,223	693	150	18,177

Langhorne Creek

Current plantings by variety and year planted

Variety	Pre-2020	2020	2021	2022	Total area % planted in (Ha)	2022
Red winegrapes						
Cabernet Franc	9	0	0	0	9	0%
Cabernet Sauvignon	1,940	11	5	3	1,959	0%
Dolcetto	8	0	0	0	8	0%
Grenache	78	0	0	0	78	0%
Lagrein	10	0	0	0	10	0%
Malbec	101	0	4	0	105	0%
Mataro	8	0	0	0	8	0%
Merlot	375	1	0	0	376	0%
Nero D'Avola	0	0	0	1	1	100%
Petit Verdot	10	0	0	0	10	0%
Pinot Noir	101	0	2	0	103	0%
Sangiovese	15	0	0	0	15	0%
Shiraz	2,276	36	3	0	2,315	0%
Tempranillo	5	0	0	0	5	0%
Zinfandel	7	0	0	0	7	0%
Other Red	31	0	0	0	31	0%
Total red varieties	4,974	48	14	4	5,040	0%
White winegrapes						
Chardonnay	458	0	0	0	458	0%
Fiano	7	0	0	0	7	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	788	0	0	0	788	0%
Unknown variety	50	0	0	0	50	0%
Rootstock Block	6	0	0	0	6	0%
Total all varieties	5,818	48	14	4	5,884	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 91 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 2023).

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

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.
- Planting data tables are current as at 30 April 2023 and include all plantings from the 2022–23 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 wine sector National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association and the Wine Grape Council 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>

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.

Any questions about the report should be directed to:

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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

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