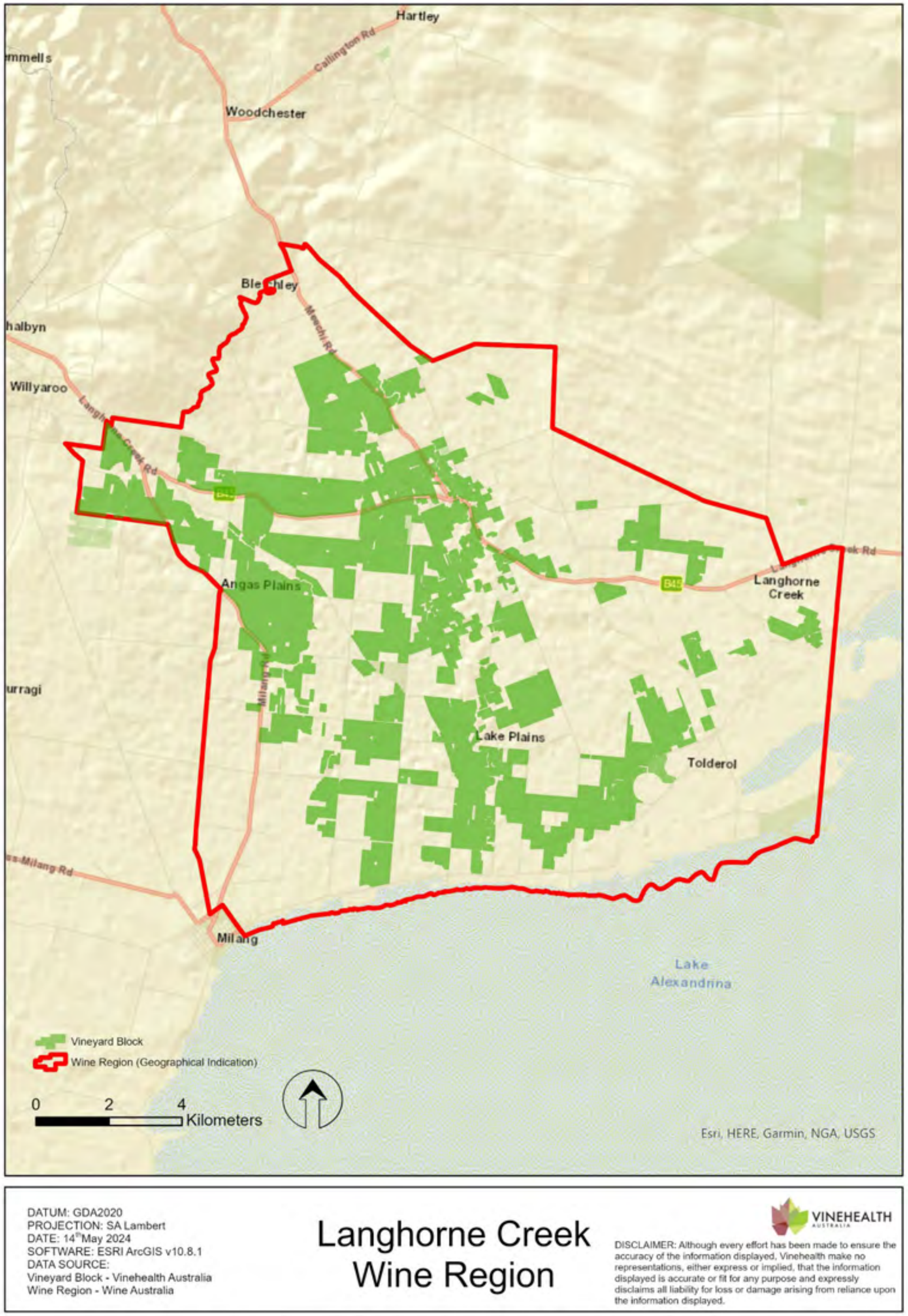


SA Winegrape Crush Survey 2024

Regional Summary Report

Langhorne Creek Wine Region

Wine Australia July 2024

Langhorne Creek

Vintage overview

VINTAGE REPORT

The vintage 2024 season presented a few challenges during the growing season, but Langhorne Creek continues to produce wine of excellent quality.

Early and late winter rainfall was above-average, and a few riverside vineyards also received a small flood, giving the soil a good soak. September and October were very dry and a few growers suffered minor frost damage and crop losses. An early but windy and cool extended flowering period in October challenged berry set and uniformity. This was followed soon after by a particularly wet November, December and January. This was good for vines that had achieved berry set but sent many vines into a vegetative cycle with some bunch shatter and further crop losses.

The mild summer was great for vine development and maintaining acidity, with a few warm periods in February pushing vines towards a focus on ripening fruit. Generally, yields were reduced due to the poor flowering period, despite the rainfall that followed flowering. The larger canopy growth from additional rainfall reduced levels of sunburn whilst maintaining acidity and aromatic compounds. That is, up until the Adelaide Cup weekend in mid-March, when the region experienced 4 hot days combined with above-average night temperatures in the low 20's.

Harvest began on the last day of January with the intake of fruit for sparkling base. The white wine intake began in early February and the red grape harvest kicked in early and pushed along rapidly until the 8th of March when the region held its breath to ride out the heat. This period put vines, people, and ferments under pressure but consistent monitoring, adaptation, overnight pressing and hard work, maintained quality.

The bulk of the Langhorne Creek vintage concluded by the second week of April with Shiraz, Cabernet Sauvignon and other late varieties completing the winery intakes.

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

OVERVIEW OF VINTAGE STATISTICS

The reported crush of Langhorne Creek winegrapes in 2024 was 23,102 tonnes, down by 13 per cent compared with the prior year's crush. Over the past five years (up to 2023), the average crush for Langhorne Creek has been 36,799 tonnes, making this year's crush 37 per cent below the five-year average. It was the lowest reported crush since 2008.

There were 47 respondents to the survey who reported crushing grapes from the Langhorne Creek in 2024, compared with 49 in 2023.

The total value of winegrapes in 2024 was $21 million, compared with $23 million in 2023, a decrease of 7 per cent. The decreased crush was partly offset by an increase in the average purchase value of grapes, which was up by 4 per cent from $852 to $884 per tonne.

There were increases in average prices for the three largest red varieties: Shiraz up by 3 per cent to $923 per tonne, Cabernet Sauvignon up by 2 per cent to $816 per tonne and Merlot up by 26 per cent to $704 per tonne. The top white variety (in tonnage terms), Chardonnay, declined by 1 per cent in average value to $658 per tonne. Pinot Gris/Grigio increased by 1 per cent to $1076 per tonne.

The price dispersion data shows little change, although the percentage of grapes purchased at below $600 per tonne decreased from 21 per cent to 19 per cent.

According to Vinehealth Australia data, the total vineyard area in Langhorne Creek as at 30 April 2024 was 5,777 hectares, a decrease of 107 hectares compared with the previous year and 182 less than it was 5 years ago. The average vineyard size in Langhorne Creek is 44.1 hectares, compared with the state average of 16.1 hectares.

There were no reported new plantings in the region this year, compared with 20 hectares in the previous season, split evenly between red and white.

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								
Cabernet Franc	5				16	75%	22	$23,650
Cabernet Sauvignon	3,952	$3,224,883	$816	2%	779	16%	4,731	$3,860,896
Durif	168						168	$33,688
Graciano					4	100%	4	$6,675
Grenache	762	$832,136	$1,092	9%	448	37%	1,210	$1,321,575
Lagrein	3						3	$3,192
Malbec	424	$500,556	$1,180	1%	68	14%	492	$580,453
Mataro/Mourvedre	3				3	46%	6	$6,180
Merlot	888	$625,348	$704	26%	437	33%	1,325	$933,215
Montepulciano	17	$36,570	$2,136	-6%	12	42%	30	$63,229
Nebbiolo					2	100%	2	$4,119
Nero d'Avola					1	100%	1	$1,846
Petit Verdot	2				20	89%	23	$25,174
Pinot Meunier	60						60	$59,500
Pinot Noir	755	$1,076,180	$1,425	-2%	329	30%	1,084	$1,544,607
Ruby Cabernet					3	100%	3	$3,280
Sangiovese	117	$161,581	$1,379	3%	10	8%	127	$175,509
Shiraz	6,764	$6,248,216	$923	3%	1,557	19%	8,321	$7,685,392
Tempranillo	12				10	47%	22	$31,472
Touriga Nacional	8						8	$14,652
Other red	13				7	37%	20	$32,980
Red Total	**13,954**	**$12,863,653**	**$921**	**7%**	**3,707**	**21%**	**17,661**	**$16,411,283**

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

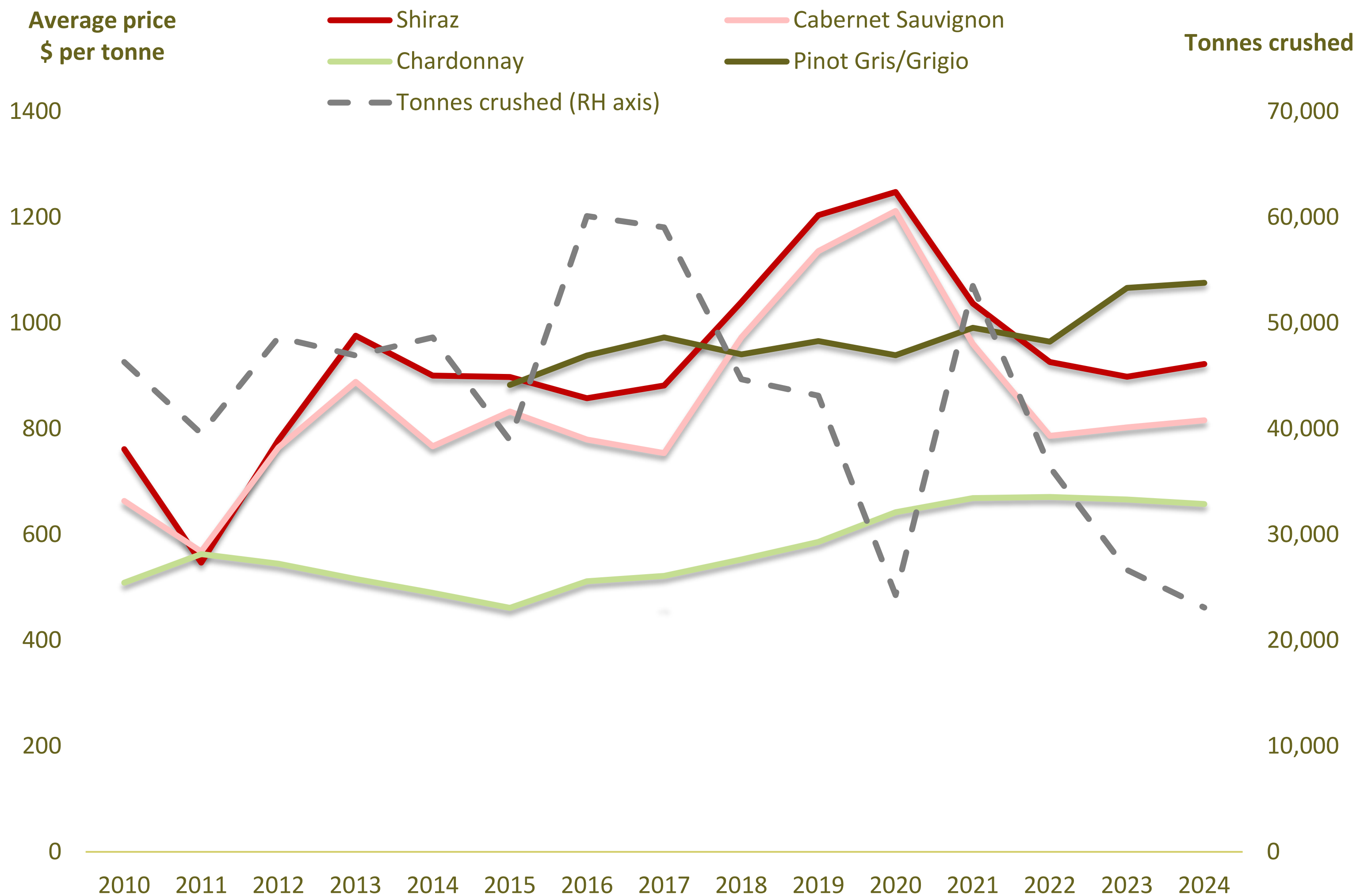
Winegrape intake summary table – white winegrapes

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	3,054	$2,008,982	$658	-1%	268	8%	3,322	$2,184,981
Fiano	26	$49,217	$1,912	7%	5	17%	31	$59,046
Marsanne					1	100%	1	$996
Muscat à Petits Grains Blancs					20	100%	20	$23,315
Pinot Gris/Grigio	395	$425,365	$1,076	1%	35	8%	430	$463,230
Riesling					911	100%	911	$1,411,800
Sauvignon Blanc	389	$409,697	$1,054	-1%	240	38%	629	$662,911
Verdelho					54	100%	54	$62,839
Vermentino	29				7	19%	36	$40,439
Other white					9	100%	9	$16,639
White Total	**3,893**	**$2,926,125**	**$752**	**-6%**	**1,548**	**28%**	**5,441**	**$4,926,198**
Grand Total	**17,847**	**$15,789,778**	**$884**	**4%**	**5,255**	**23%**	**23,102**	**$21,337,481**

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						
Cabernet Franc			5			5
Cabernet Sauvignon	1,091	1,101	1,683	64	12	3,952
Durif	168					168
Grenache			762			762
Lagrein			3			3
Malbec			405	19		424
Mataro/Mourvedre			3			3
Merlot	109	774	5			888
Montepulciano				6	11	17
Petit Verdot			2			2
Pinot Meunier			60			60
Pinot Noir			377	379		755
Sangiovese			105	10		115
Shiraz	882	2,480	3,159	147	96	6,764
Tempranillo			3	9		12
Touriga Nacional				8		8
Other red			10		2	13
Red Total	**2,250**	**4,355**	**6,583**	**642**	**122**	**13,952**
White						
Chardonnay	1,181	1,599	275			3,054
Fiano				8	18	26
Pinot Gris/Grigio			379	16		395
Sauvignon Blanc			389			389
Vermentino			29			29
White Total	**1,181**	**1,599**	**1,072**	**24**	**18**	**3,893**
Total purchased	**3,431**	**5,953**	**7,655**	**665**	**140**	**17,845**

Langhorne Creek

Current plantings by variety and year planted

Variety	Area (hectares) Pre-2021	2021	2022	2023	Total area (Ha)	% planted in 2023
Red winegrapes						
Cabernet Franc	9	0	0	0	9	0%
Cabernet Sauvignon	1,891	5	2	0	1,898	0%
Dolcetto	8	0	0	0	8	0%
Durif (Petite Sirah)	7	0	0	0	7	0%
Grenache	78	0	2	0	80	0%
Lagrein	10	0	0	0	10	0%
Malbec	94	4	0	0	98	0%
Mataro (Mourvedre)	8	0	0	0	8	0%
Merlot	376	0	0	0	376	0%
Nero d'Avola	0	0	1	0	1	0%
Petit Verdot	9	0	0	0	9	0%
Pinot Noir	100	2	2	0	105	0%
Sangiovese	15	0	0	0	15	0%
Shiraz	2,295	5	0	0	2,300	0%
Tempranillo	5	0	2	0	7	0%
Zinfandel	7	0	0	0	7	0%
Other Red	27	0	0	0	27	0%
Red winegrapes Total	**4,938**	**16**	**10**	**0**	**4,964**	**0%**
White winegrapes						
Chardonnay	433	0	0	0	433	0%
Fiano	7	0	2	0	10	0%
Pinot Gris	50	0	0	0	50	0%
Riesling	138	0	0	0	138	0%
Sauvignon Blanc	75	0	5	0	80	0%
Verdelho	8	0	0	0	8	0%
Other White	30	0	3	0	33	0%
White winegrapes Total	**741**	**0**	**10**	**0**	**751**	**0%**
Unknown variety	56	0	0	0	56	0%
Rootstock	6	0	0	0	6	0%
All varieties Total	**5,741**	**16**	**20**	**0**	**5,777**	**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 reported to have been 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 in 2024 is 88 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, leased or associated vineyards ("own grown") and fruit purchased from other grape producers ("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 2024).

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 (price dispersion), differences in quality 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 2024 and include all plantings from the 2023–24 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.
- The totals by year planted may not align with the total areas, as new plantings without a year are captured in the pre-2021 bucket, but not against the individual reported years.
- 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 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

About Wine Australia

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

Credits

Image (Fleurieu vineyard) – Nigel Wood
GI maps – Vinehealth Australia

Disclaimer

This information has been made available to assist on the understanding that Wine Australia is not rendering professional advice. Wine Australia does not accept responsibility for the results of any actions taken on the basis of the information contained in this report, nor for the accuracy, currency or completeness of any material contained in it. Wine Australia expressly disclaims all and any liability and responsibility to any person in respect of consequences of anything done in respect of reliance, whether wholly or in part, upon this report.

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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