



Langhorne Creek

LANGHORNE CREEK VINTAGE OVERVIEW

Vintage report

Langhorne Creek experienced ideal growing conditions up to veraison this year followed by a long ripening period of mild, dry days and cool nights. The absence of weather extremes allowed every red variety, including the more heat-sensitive varieties, to achieve excellent ripeness, character and concentration of flavour.



It was an early vintage this year with fruit destined for sparkling wine being harvested from the start of February. The harvest was then relatively constant with most wineries finishing earlier than in past years. Only a few small parcels remained to be harvested by late April.

Yields, particularly of reds, were low to average this year but small berry size assisted with flavour concentration.

Reds varieties across the district showed intense colours, clear varietal characteristics and excellent length of flavour although some berry dehydration in the last third of harvest has seen a few overripe wines being produced.

Lian Jaensch

Langhorne Creek Wine Industry Council

Overview of vintage statistics

Langhorne Creek crushed 60,860 tonnes in 2005 – another record harvest. 81% of the crush was red varieties – down from 87% in 2004. Total income to growers was up by 5%, and the total value of grapes to the region increased from \$63 million in 2004 to \$65 million. The average purchase value for Shiraz and Cabernet Sauvignon was down by around \$50 - \$75 per tonne, while Chardonnay dropped by \$250 per tonne. The average value for Riesling, on the other hand, increased by over \$200 per tonne.

The forecast is for a strong increase in demand, from 66,700t in 2006 to 79,000t in 2010, while estimated intake is expected to fall short of preferred intake in each forecast year. Demand for white varieties is expected to grow by 40% over the five years.

There was very little new planting in Langhorne Creek in 2004 – a total of 64 hectares (1%). Most of the new plantings were in Chardonnay and Shiraz. The area planted to Chardonnay has more than doubled in the past five years.

Based on the current vineyard area in the region, and using estimated yield figures of 10t/ha for reds and 11.5t/ha for whites, the estimated production for Langhorne Creek in 2008 is around 60,000 tonnes. This falls well short of the preferred intake for that year (77,000t). There are significant estimated shortfalls in Shiraz (9000t), Cabernet Sauvignon (4,000t), Merlot (1700t) and Chardonnay (1400t).

LANGHORNE CREEK CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 9.1

Current area in hectares by year planted

| Variety | Pre-2000 | 2000 | 2001 | 2002 | 2003 | 2004 | Total area | % planted in 2004 |
|-------------------------------|-------------|------------|------------|------------|------------|-----------|-------------|-------------------------|
| RED WINEGRAPES | | | | | | | | |
| CABERNET FRANC | 17 | 0 | 0 | 0 | 0 | 0 | 17 | 0% |
| CABERNET SAUVIGNON | 1819 | 73 | 72 | 60 | 24 | 6 | 2054 | 0% |
| GRENACHE | 80 | 45 | 1 | 0 | 0 | 0 | 126 | 0% |
| MALBEC | 41 | 1 | 0 | 1 | 0 | 0 | 43 | 0% |
| MATARO (MOUVEDRE) | 8 | 0 | 0 | 0 | 0 | 0 | 8 | 0% |
| MERLOT | 356 | 0 | 0 | 59 | 20 | 0 | 434 | 0% |
| NEBBIOLO | 9 | 0 | 2 | 0 | 0 | 0 | 11 | 0% |
| PETIT VERDOT | 53 | 0 | 1 | 0 | 0 | 0 | 54 | 0% |
| PINOT NOIR | 40 | 0 | 0 | 7 | 6 | 0 | 53 | 0% |
| SANGIOVESE | 53 | 0 | 0 | 1 | 0 | 0 | 53 | 0% |
| SHIRAZ | 1629 | 60 | 185 | 39 | 101 | 21 | 2036 | 1% |
| ZINFANDEL | 7 | 0 | 0 | 0 | 0 | 1 | 9 | 16% |
| OTHER RED | 9 | 6 | 5 | 0 | 1 | 2 | 24 | 9% |
| TOTAL RED WINEGRAPES | 4122 | 186 | 266 | 166 | 152 | 30 | 4922 | 1% |
| WHITE WINEGRAPES | | | | | | | | |
| CHARDONNAY | 289 | 6 | 97 | 218 | 49 | 31 | 690 | 5% |
| PINOT GRIS | 2 | 0 | 0 | 0 | 0 | 3 | 5 | 51% |
| RIESLING | 50 | 0 | 66 | 22 | 0 | 0 | 138 | 0% |
| SAUVIGNON BLANC | 4 | 0 | 0 | 0 | 0 | 0 | 5 | 9% |
| SEMILLON | 29 | 0 | 0 | 0 | 0 | 0 | 29 | 0% |
| TRAMINER | 0 | 0 | 15 | 0 | 0 | 0 | 15 | 0% |
| VERDELHO | 53 | 0 | 0 | 0 | 0 | 0 | 53 | 0% |
| VIOGNIER | 13 | 0 | 0 | 1 | 9 | 0 | 24 | 0% |
| OTHER WHITE | 7 | 0 | 0 | 2 | 0 | 0 | 9 | 0% |
| TOTAL WHITE WINEGRAPES | 448 | 6 | 179 | 243 | 58 | 34 | 968 | 4% |
| TOTAL ALL VARIETIES | 4570 | 192 | 445 | 409 | 210 | 64 | 5890 | 1% |



LANGHORNE CREEK TONNES CRUSHED BY VARIETY - VINTAGE 2005

Table 9.2

| Variety | Total winery | Total other | Total crushed | Total preferred | Tonnes % of total | % of | Number of wineries reporting tonnages | | |
|-------------------------|---------------|---------------|---------------|-----------------|----------------------|-------------|---------------------------------------|-------|-----------|
| | | | | | | | Own | Other | Preferred |
| RED | | | | | | | | | |
| Barbera | 7 | 11 | 18 | 22 | 63% | 80% | 1 | 1 | 2 |
| Cabernet Franc | 49 | 85 | 134 | 14 | 63% | 960% | 3 | 2 | 3 |
| Cabernet Sauvignon | 6,187 | 13,122 | 19,309 | 20,810 | 68% | 93% | 12 | 22 | 28 |
| Dolcetto | 0 | 14 | 14 | 20 | 100% | 70% | 0 | 1 | 1 |
| Grenache | 993 | 1,384 | 2,377 | 2,145 | 58% | 111% | 6 | 3 | 6 |
| Malbec | 166 | 194 | 360 | 437 | 54% | 82% | 7 | 7 | 11 |
| Mataro | 0 | 77 | 77 | 0 | 100% | | 0 | 1 | 0 |
| Merlot | 2,173 | 2,768 | 4,941 | 5,068 | 56% | 97% | 10 | 16 | 19 |
| Nebbiolo | 0 | 10 | 10 | 0 | 100% | | 0 | 1 | 0 |
| Other red | 16 | 41 | 57 | 100 | 72% | 57% | 2 | 2 | 4 |
| Petit Verdot | 368 | 264 | 632 | 655 | 42% | 96% | 9 | 5 | 11 |
| Pinot Noir | 547 | 237 | 783 | 558 | 30% | 140% | 3 | 2 | 3 |
| Sangiovese | 104 | 446 | 550 | 528 | 81% | 104% | 3 | 2 | 4 |
| Shiraz | 4,643 | 15,470 | 20,113 | 22,497 | 77% | 89% | 11 | 26 | 30 |
| Tempranillo | 0 | 13 | 13 | 0 | 100% | | 0 | 1 | 0 |
| Zinfandel | 0 | 3 | 3 | 4 | 100% | 70% | 0 | 1 | 1 |
| Total RED | 15,252 | 34,138 | 49,390 | 52,857 | 69% | 93% | | | |
| <i>% of grand total</i> | | | <i>81%</i> | <i>84%</i> | | | | | |
| WHITE | | | | | | | | | |
| Arneis | 0 | 1 | 1 | 0 | 100% | | 0 | 1 | 0 |
| Chardonnay | 2,482 | 5,251 | 7,733 | 6,655 | 68% | 116% | 6 | 11 | 13 |
| Chenin Blanc | 15 | 0 | 15 | 15 | 0% | 100% | 1 | 0 | 1 |
| Doradillo | 0 | 3 | 3 | 0 | 100% | | 0 | 1 | 0 |
| Muscat Blanc | 9 | 0 | 9 | 9 | 0% | 100% | 1 | 0 | 1 |
| Other white | 0 | 12 | 12 | 0 | 100% | | 0 | 1 | 0 |
| Pinot Gris | 0 | 44 | 44 | 73 | 100% | 60% | 0 | 2 | 2 |
| Riesling | 1,640 | 440 | 2,080 | 1,647 | 21% | 126% | 3 | 2 | 3 |
| Sauvignon Blanc | 33 | 64 | 97 | 70 | 66% | 139% | 1 | 3 | 2 |
| Semillon | 0 | 477 | 477 | 477 | 100% | 100% | 0 | 1 | 1 |
| Traminer | 0 | 288 | 288 | 288 | 100% | 100% | 0 | 1 | 1 |
| Verdelho | 221 | 351 | 572 | 725 | 61% | 79% | 4 | 6 | 9 |
| Viognier | 71 | 67 | 138 | 199 | 48% | 70% | 2 | 2 | 4 |
| Total WHITE | 4,471 | 6,999 | 11,470 | 10,159 | 61% | 113% | | | |
| <i>% of grand total</i> | | | <i>19%</i> | <i>16%</i> | | | | | |
| Grand Total | 19,723 | 41,137 | 60,860 | 63,016 | 68% | 97% | | | |

LANGHORNE CREEK CROP VALUE DATA - VINTAGE 2005

Table 9.3

| Variety | Grower grown (t) | Total crushed (t) | Estimated total value purchased grapes | Estimated total value total grapes | Lowest price ¹ | Highest price | Calc average purchase value per tonne | qualifier ² |
|----------------------------|------------------|-------------------|--|------------------------------------|---------------------------|---------------|---------------------------------------|------------------------|
| RED | | | | | | | | |
| Barbera | 11 | 18 | \$13,668 | \$21,869 | | | \$1,243 | 100% |
| Cabernet Franc | 85 | 134 | \$57,238 | \$90,264 | | | \$672 | 100% |
| Cabernet Sauvignon | 13,122 | 19,309 | \$14,069,818 | \$20,704,070 | \$250 | \$2,300 | \$1,072 | 100% |
| Dolcetto | 14 | 14 | \$19,600 | \$19,600 | | | \$1,400 | 100% |
| Grenache | 1,384 | 2,377 | \$632,961 | \$1,087,004 | \$300 | \$980 | \$457 | 100% |
| Malbec | 194 | 360 | \$220,499 | \$408,653 | \$300 | \$1,600 | \$1,134 | 100% |
| Mataro | 77 | 77 | \$77,400 | \$77,400 | | | \$1,000 | 100% |
| Merlot | 2,768 | 4,941 | \$3,017,638 | \$5,386,370 | \$100 | \$1,825 | \$1,090 | 97% |
| Nebbiolo | 10 | 10 | \$10,465 | \$10,465 | | | \$0 | 0% |
| Other red | 41 | 57 | \$35,720 | \$49,694 | | | \$873 | 100% |
| Petit Verdot | 264 | 632 | \$280,838 | \$672,358 | \$800 | \$2,010 | \$1,065 | 71% |
| Pinot Noir | 237 | 783 | \$178,054 | \$589,682 | | | \$753 | 100% |
| Sangiovese | 446 | 550 | \$506,425 | \$624,798 | | | \$1,136 | 100% |
| Shiraz | 15,470 | 20,113 | \$17,749,762 | \$23,076,868 | \$250 | \$3,500 | \$1,147 | 99% |
| Tempranillo | 13 | 13 | \$13,728 | \$13,728 | | | \$1,098 | 100% |
| Zinfandel | 3 | 3 | \$4,200 | \$4,200 | | | \$1,500 | 100% |
| Total RED | 34,138 | 49,390 | \$36,888,013 | \$52,837,022 | | | | |
| WHITE | | | | | | | | |
| Arneis | 1 | 1 | \$1,200 | \$1,200 | | | \$1,200 | 100% |
| Chardonnay | 5,251 | 7,733 | \$5,865,624 | \$8,637,839 | \$300 | \$1,900 | \$1,117 | 100% |
| Chenin Blanc | 0 | 15 | \$0 | \$15,994 | | | \$0 | |
| Doradillo | 3 | 3 | \$848 | \$848 | | | \$250 | 100% |
| Muscat Blanc | 0 | 9 | \$0 | \$9,596 | | | \$0 | |
| Other white | 12 | 12 | \$2,446 | \$2,446 | | | \$200 | 100% |
| Pinot Gris | 44 | 44 | \$46,925 | \$46,925 | | | \$1,074 | 100% |
| Riesling | 440 | 2,080 | \$464,690 | \$2,197,792 | | | \$1,057 | 100% |
| Sauvignon Blanc | 64 | 97 | \$55,590 | \$83,994 | \$200 | \$1,070 | \$864 | 100% |
| Semillon | 477 | 477 | \$375,508 | \$375,508 | | | \$787 | 100% |
| Traminer | 288 | 288 | \$147,613 | \$147,613 | | | \$512 | 100% |
| Verdelho | 351 | 572 | \$407,634 | \$664,056 | \$850 | \$1,503 | \$1,160 | 100% |
| Viognier | 67 | 138 | \$94,800 | \$195,896 | | | \$1,415 | 100% |
| Total WHITE | 6,999 | 11,470 | \$7,462,877 | \$12,379,707 | | | | |
| Total all varieties | 41,137 | 60,860 | \$44,350,891 | \$65,216,730 | | | | |

¹ The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

² This indicates the percentage of purchased fruit for which pricing information was supplied.



LANGHORNE CREEK ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2006 TO 2010

Table 9.4

| Variety | 2006 | | | 2007 | | | 2008 | | | 2009 | | | 2010 | | |
|----------------------------|---------------|---------------|------------------------|---------------|---------------|-----------|---------------|---------------|-----------|---------------|---------------|-----------|---------------|---------------|-----------|
| | estimated | preferred | qualifier ¹ | estimated | preferred | qualifier | estimated | preferred | qualifier | estimated | preferred | qualifier | estimated | preferred | qualifier |
| RED | | | | | | | | | | | | | | | |
| Barbera | 20 | 30 | 100% | 25 | 40 | 100% | 25 | 40 | 100% | 25 | 40 | 100% | 30 | 45 | 100% |
| Cabernet Franc | 142 | 4 | 86% | 142 | 6 | 86% | 142 | 6 | 86% | 142 | 6 | 86% | 142 | 6 | 86% |
| Cabernet Sauvignon | 22,672 | 22,535 | 100% | 23,376 | 24,410 | 100% | 21,263 | 24,686 | 99% | 20,426 | 25,403 | 98% | 20,073 | 25,189 | 95% |
| Dolcetto | 15 | 35 | 100% | 35 | 45 | 100% | 55 | 70 | 100% | 85 | 85 | 100% | 85 | 85 | 100% |
| Grenache | 1,467 | 1,359 | 99% | 1,427 | 1,319 | 99% | 1,385 | 1,385 | 99% | 1,481 | 1,481 | 99% | 1,541 | 1,541 | 99% |
| Malbec | 513 | 466 | 97% | 513 | 466 | 97% | 460 | 414 | 84% | 460 | 414 | 84% | 455 | 404 | 84% |
| Mataro | 60 | 0 | 100% | 60 | 0 | 100% | 60 | 0 | 100% | 60 | 0 | 100% | 60 | 0 | 100% |
| Merlot | 4,932 | 5,227 | 97% | 5,202 | 5,825 | 97% | 5,004 | 6,054 | 96% | 4,907 | 6,237 | 92% | 4,847 | 6,177 | 90% |
| Nebbiolo | 11 | 0 | 100% | 11 | 0 | 100% | 11 | 0 | 100% | 11 | 0 | 100% | 11 | 0 | 100% |
| Other red | 50 | 70 | 72% | 25 | 45 | 9% | 45 | 75 | 9% | 75 | 115 | 9% | 115 | 115 | 9% |
| Petit Verdot | 506 | 483 | 98% | 541 | 518 | 98% | 415 | 402 | 83% | 441 | 428 | 83% | 321 | 308 | 71% |
| Pinot Noir | 646 | 566 | 83% | 670 | 590 | 83% | 706 | 626 | 83% | 776 | 696 | 83% | 826 | 746 | 83% |
| Sangiovese | 407 | 303 | 100% | 407 | 303 | 100% | 385 | 285 | 96% | 385 | 285 | 96% | 385 | 285 | 96% |
| Shiraz | 21,906 | 24,635 | 99% | 23,357 | 27,012 | 99% | 23,206 | 29,333 | 98% | 21,951 | 29,877 | 97% | 22,018 | 29,930 | 97% |
| Zinfandel | 4 | 4 | 100% | 3 | 3 | 100% | 3 | 3 | 100% | 3 | 3 | 100% | 3 | 3 | 100% |
| Total RED | 53,351 | 55,717 | | 55,794 | 60,581 | | 53,165 | 63,378 | | 51,227 | 65,069 | | 50,912 | 64,833 | |
| WHITE | | | | | | | | | | | | | | | |
| Chardonnay | 9,020 | 7,863 | 99% | 10,457 | 8,741 | 99% | 11,024 | 9,367 | 97% | 11,538 | 9,753 | 97% | 11,491 | 9,924 | 96% |
| Doradillo | 7 | 0 | 100% | 7 | 0 | 100% | 7 | 0 | 100% | 7 | 0 | 100% | 7 | 0 | 100% |
| Muscat Blanc | 9 | 9 | 100% | 9 | 9 | 100% | 9 | 9 | 100% | 9 | 9 | 100% | 9 | 9 | 100% |
| Pinot Gris | 45 | 78 | 100% | 55 | 88 | 100% | 30 | 40 | 43% | 40 | 40 | 43% | 40 | 50 | 43% |
| Riesling | 2,077 | 1,564 | 99% | 2,309 | 2,080 | 99% | 2,309 | 2,080 | 99% | 2,309 | 2,080 | 99% | 2,309 | 2,080 | 99% |
| Sauvignon Blanc | 76 | 70 | 55% | 140 | 140 | 55% | 257 | 257 | 55% | 360 | 360 | 55% | 420 | 420 | 55% |
| Semillon | 330 | 330 | 100% | 380 | 380 | 100% | 480 | 480 | 100% | 570 | 570 | 100% | 610 | 610 | 100% |
| Traminer | 162 | 162 | 100% | 162 | 162 | 100% | 0 | 0 | 0% | 0 | 0 | 0% | 0 | 0 | 0% |
| Verdelho | 697 | 692 | 93% | 726 | 722 | 93% | 604 | 904 | 85% | 629 | 929 | 85% | 629 | 929 | 85% |
| Viognier | 200 | 220 | 93% | 250 | 270 | 93% | 286 | 306 | 93% | 347 | 347 | 93% | 363 | 383 | 93% |
| Total WHITE | 12,623 | 10,988 | | 14,495 | 12,592 | | 15,006 | 13,443 | | 15,809 | 14,088 | | 15,878 | 14,405 | |
| Total all varieties | 65,973 | 66,705 | | 70,289 | 73,173 | | 68,171 | 76,821 | | 67,036 | 79,157 | | 66,790 | 79,238 | |

¹ This indicates the percentage of crushed fruit in the current vintage for which forecast intake data was supplied.

LANGHORNE CREEK SUPPLY VS DEMAND FORECASTS 2006 AND 2008

Table 9.4

| Variety | 2006 | | | | | 2008 | | | | |
|--------------------|--|--|--|---------------------|--------------|--|--|--|---------------------|--------------|
| | estimated bearing area (ha) ¹ | estimated production (tonnes) ² | preferred intake (tonnes) ³ | Difference (tonnes) | % difference | estimated bearing area (ha) ¹ | estimated production (tonnes) ² | preferred intake (tonnes) ³ | Difference (tonnes) | % difference |
| Barbera | 2 | 20 | 30 | -10 | -50% | 2 | 20 | 40 | -20 | -100% |
| Cabernet Franc | 17 | 170 | 4 | 166 | 98% | 17 | 170 | 6 | 164 | 96% |
| Cabernet Sauvignon | 2,024 | 20240 | 22,535 | -2,295 | -11% | 2,054 | 20540 | 24,686 | -4,146 | -20% |
| Grenache | 126 | 1260 | 1,359 | -99 | -8% | 126 | 1260 | 1,385 | -125 | -10% |
| Malbec | 43 | 430 | 466 | -36 | -8% | 43 | 430 | 414 | 16 | 4% |
| Mataro | 8 | 80 | 0 | 80 | 100% | 8 | 80 | 0 | 80 | 100% |
| Merlot | 414 | 4140 | 5,227 | -1,087 | -26% | 434 | 4340 | 6,054 | -1,714 | -39% |
| Nebbiolo | 11 | 110 | 0 | 110 | 100% | 11 | 110 | 0 | 110 | 100% |
| Other red | 19 | 190 | 105 | 85 | 45% | 22 | 220 | 145 | 75 | 34% |
| Petit Verdot | 54 | 540 | 483 | 57 | 11% | 54 | 540 | 402 | 138 | 26% |
| Pinot Noir | 47 | 470 | 566 | -96 | -20% | 53 | 530 | 626 | -96 | -18% |
| Sangiovese | 53 | 530 | 303 | 227 | 43% | 53 | 530 | 285 | 245 | 46% |
| Shiraz | 1,914 | 19140 | 24,635 | -5,495 | -29% | 2,036 | 20360 | 29,333 | -8,973 | -44% |
| Zinfandel | 7 | 70 | 4 | 66 | 94% | 9 | 90 | 3 | 88 | 97% |
| Red Total | 4,739 | 47390 | 55,717 | -8,327 | -18% | 4,922 | 49220 | 63,378 | -14,158 | -29% |
| Chardonnay | 610 | 7015 | 7,863 | -848 | -12% | 690 | 7935 | 9,367 | -1,432 | -18% |
| Other white | 9 | 103.5 | 9 | 95 | 91% | 9 | 103.5 | 9 | 95 | 91% |
| Pinot Gris | 2 | 23 | 78 | -55 | -239% | 5 | 57.5 | 40 | 18 | 30% |
| Riesling | 138 | 1587 | 1,564 | 23 | 1% | 138 | 1587 | 2,080 | -493 | -31% |
| Sauvignon Blanc | 4 | 46 | 70 | -24 | -52% | 5 | 57.5 | 257 | -200 | -347% |
| Semillon | 29 | 333.5 | 330 | 4 | 1% | 29 | 333.5 | 480 | -147 | -44% |
| Traminer | 15 | 172.5 | 162 | 11 | 6% | 15 | 172.5 | 0 | 173 | 100% |
| Verdelho | 53 | 609.5 | 692 | -83 | -14% | 53 | 609.5 | 904 | -295 | -48% |
| Viognier | 14 | 161 | 220 | -59 | -37% | 24 | 276 | 306 | -30 | -11% |
| White Total | 874 | 10051 | 10,988 | -937 | -9% | 968 | 11132 | 13,443 | -2,311 | -21% |
| Grand Total | 5,613 | 57441 | 66,705 | -9,264 | -16% | 5,890 | 60352 | 76,821 | -16,469 | -27% |

This table compares estimated future production (supply) - based on planting data - with estimated future demand (preferred intake). This gives a better indication of possible shortfalls and surpluses than comparing estimated with preferred intake, as estimated intake does not necessarily account for all production of a given variety.

(1) Planting data derived from PGIB vineyard register. Bearing area includes plantings more than three years old.

(2) Bearing area multiplied by yield estimate of 10t/ha for reds and 11.5t/ha for whites.

(3) Taken from the Utilisation and Pricing survey (see previous page).



LANGHORNE CREEK PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1992 - 2010

Figure 9.1

Past production and projections (major varieties)

