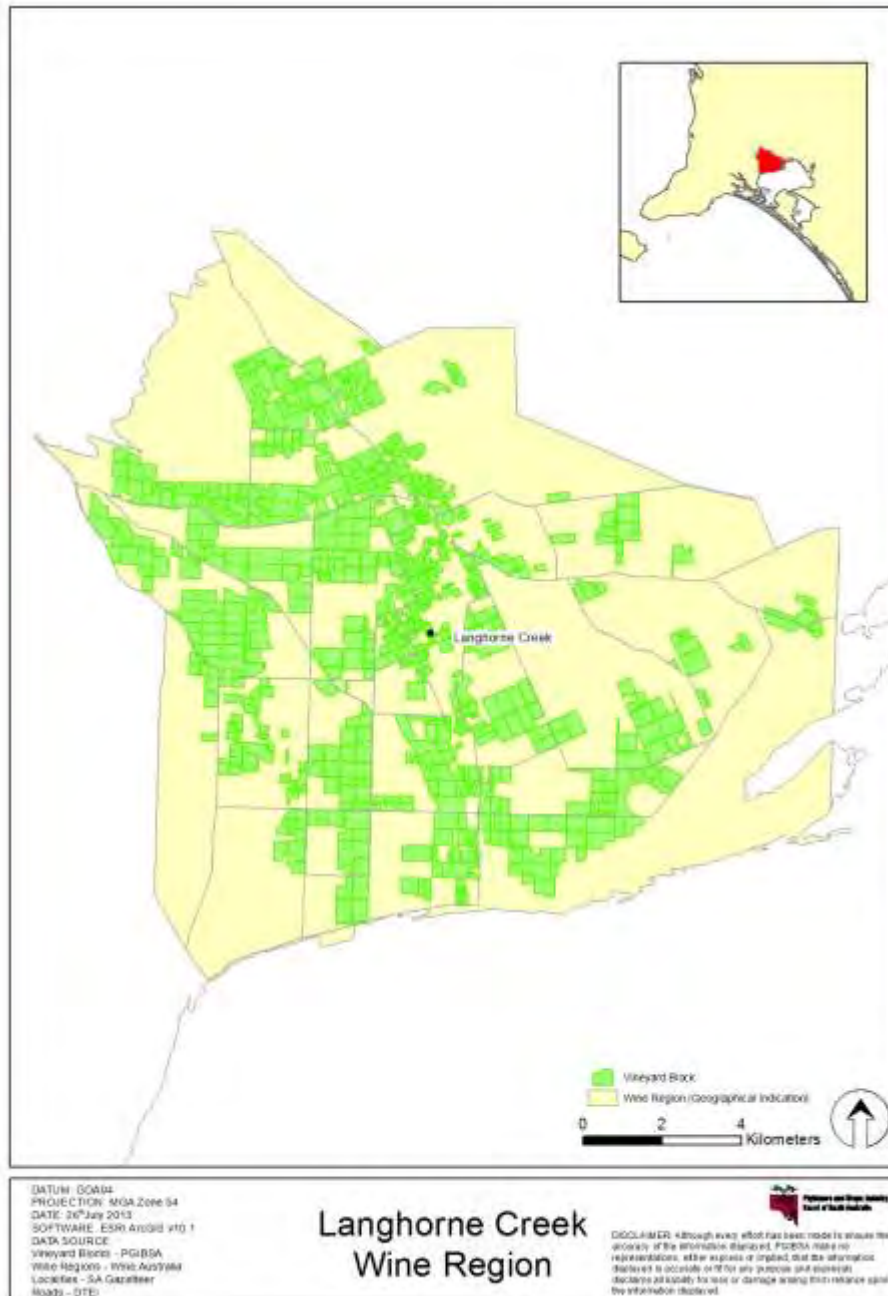


SA Winegrape Crush Survey Regional Summary Report - 2013

Langhorne Creek Wine Region



Langhorne Creek
Wine Region

Langhorne Creek

Vintage overview

Vintage report

What's that saying? Early Easter, early vintage....

The 2013 Langhorne Creek vintage kicked off in the 1st week of February and progressed at a fast and furious pace leaving only a small amount of late harvest varieties by the end of March.

The season began with excellent soil moisture profiles across the district thanks to good winter and early spring rains which fortunately supported vines through a warm and dry later spring and summer.

It has been a year of very low disease pressure for Langhorne Creek although unusually high numbers of vine moth were noted during spring which then reduced by early December leaving no significant impact.

The growing period presented a minor frost event in September and a cool early flowering period. Reduced and/or variable fruit set in early flowering blocks impacted yields particularly for early Cabernet Sauvignon. Later flowering blocks have produced average yields across varieties. Warm nights into February and March led to rapid ripening and flavor development in all red varieties.

A dry end to the season resulted in a compressed vintage with harvesting maintained at a steady rate.

While demand for Chardonnay remains low across the industry, all other varieties continue to be sought after and are well supplied from Langhorne Creek.

A conservative regional estimate of between 45,000 and 48,000 tonnes is anticipated from the Langhorne Creek 2013 vintage.

It may have been a frantic vintage with some lighter crops but the fruit has been well received by wineries. White varieties have performed well and we can expect some outstanding reds amongst the Cabernet, Shiraz, and though in lower amounts than desired, excellent Malbec.

Another vintage to look forward to for wine lovers.

*Lian Jaensch
Langhorne Creek Wine Industry Council*

Overview of vintage statistics

The harvest from Langhorne Creek was 46,930 tonnes in 2013, down by 1,721 tonnes (3.5%) on the 2012 harvest of 48,651 tonnes. The total value of grapes from the region increased from \$35 million to \$38.7 million. The average purchase price of the red varieties increased – Shiraz up by \$197 per tonne to \$976 per tonne; Cabernet Sauvignon up by \$124 per tonne to \$889 per tonne and Merlot up by \$62 per tonne to \$782 per tonne. Whilst of the white varieties – Chardonnay decreased slightly by \$29 per tonne to \$516 per tonne and Riesling increased by \$48 per tonne to \$536 per tonne.

There were 33 hectares of new plantings in Langhorne Creek in spring 2012 (including top-working and replacements) compared with 18 hectares planted in 2011. Of the new plantings, Cabernet Sauvignon accounted for 39.4% and Shiraz 42.4%. Since 2008, the total planted area of vines has been decreasing steadily each year, from 6,214 hectares in 2008 to 5,895 hectares in 2012. A total of 319 hectares (5.1%) has been removed.

The estimated production from Langhorne Creek for 2014 is 54,600 tonnes, with the wineries' committed intake being 50,100 tonnes. This leaves around 4,500 tonnes (8.2%) of uncommitted fruit.

In 2018, the estimated production is 54,800 tonnes, of which 40,800 tonnes is already under contract or winery grown fruit. This leaves an estimated 14,000 tonnes (25.5%) yet to be contracted or is available on the open market.

Langhorne Creek

Winegrape intake summary - vintage 2013

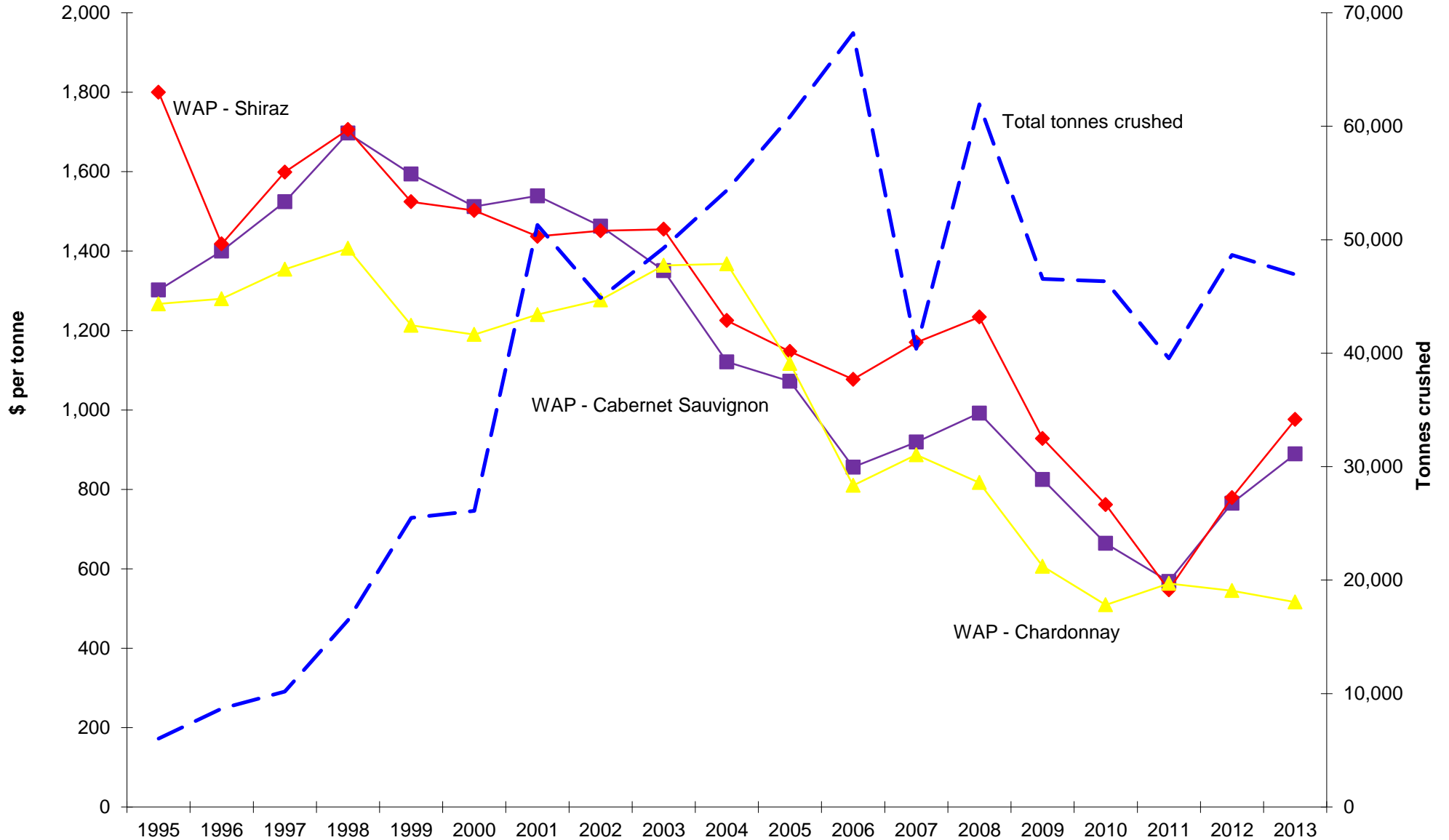
Variety	Tonnes purchased	Lowest price ¹	Highest price ¹	Total value purchased grapes	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
RED								
Cabernet Franc	11			\$8,250	\$750	5	16	\$11,895
Cabernet Sauvignon	8,097	\$488	\$2,700	\$7,198,627	\$889	4,692	12,789	\$11,370,356
Grenache	401	\$400	\$1,050	\$239,498	\$597	863	1,263	\$754,823
Malbec	195	\$600	\$2,000	\$198,368	\$1,015	104	300	\$304,156
Mataro	30	\$800	\$1,050	\$29,925	\$989	0	30	\$29,925
Merlot	2,348	\$350	\$1,300	\$1,837,194	\$782	1,571	3,919	\$3,066,008
Nebbiolo	10			\$5,000	\$500	12	22	\$10,800
Other red	217	\$300	\$1,800	\$175,016	\$806	4	221	\$178,240
Petit Verdot	98			\$88,916	\$904	22	121	\$109,215
Pinot Noir	939	\$450	\$700	\$649,467	\$691	349	1,288	\$890,581
Sangiovese	185	\$300	\$900	\$135,977	\$737	0	185	\$135,977
Shiraz	9,612	\$600	\$2,700	\$9,379,845	\$976	6,513	16,125	\$15,735,247
Tempranillo	11			\$5,162	\$453	2	13	\$6,068
Touriga	19	\$800	\$1,800	\$24,548	\$1,319	0	19	\$24,548
Total Red winegrapes	22,175			\$19,975,792		14,136	36,311	\$32,627,839
WHITE								
Chardonnay	4,601	\$280	\$1,100	\$2,373,485	\$516	1,362	5,963	\$3,076,236
Chenin Blanc	0			\$0	\$0	14	14	\$7,818
Muscat A Petit Grains Blanc	0			\$0	\$0	19	19	\$10,946
Other white	67	\$750	\$1,750	\$91,285	\$1,370	24	91	\$124,176
Pinot Gris	399	\$825	\$1,200	\$362,987	\$910	64	463	\$421,208
Riesling	681			\$364,890	\$536	1,877	2,558	\$1,370,881
Sauvignon Blanc	628	\$700	\$900	\$465,075	\$741	343	971	\$719,098
Traminer	0			\$0	\$0	57	57	\$32,757
Verdelho	188	\$600	\$1,300	\$139,932	\$746	118	306	\$228,003
Viognier	163			\$77,108	\$472	15	179	\$84,232
Total White winegrapes	6,726			\$3,874,761		3,893	10,619	\$6,075,354
Grand Total All winegrapes	28,900			\$23,850,553		18,029	46,930	\$38,703,193

¹ Lowest and highest prices are only reported when there are at least three purchasers. Very low prices may relate to extremely small parcels of fruit or fruit delivered that was over the contract amount or penalised for other reasons.

² It is estimated that the non-response rate for Langhorne Creek is 4.5%.

Langhorne Creek

Historical Weighted Average Price vs tonnes crushed



Langhorne Creek

Current plantings by variety and year planted

Variety	Current area in hectares				Total area	% planted in 2012
	Pre-2010	2010	2011	2012		
Red winegrapes						
Cabernet Franc	14	0	0	0	14	0%
Cabernet Sauvignon	1,817	5	7	13	1,842	1%
Dolcetto	13	0	0	0	13	0%
Grenache	120	0	0	0	120	0%
Lagrein	10	0	0	0	10	0%
Malbec	45	7	8	6	67	9%
Merlot	379	1	0	0	380	0%
Nebbiolo	12	0	0	0	13	0%
Other Red	130	2	0	0	132	0%
Petit Verdot	28	0	0	0	28	0%
Sangiovese	38	0	0	0	38	0%
Shiraz	2,111	8	7	14	2,140	1%
Total red varieties	4,719	24	22	33	4,798	1%
White winegrapes						
Chardonnay	654	0	0	0	654	0%
Other White	19	1	0	0	21	0%
Pinot Gris	42	0	0	0	42	0%
Riesling	166	0	0	0	166	0%
Sauvignon Blanc	65	0	0	0	65	0%
Semillon	4	0	0	0	4	0%
Traminer (Gewurztraminer)	15	0	0	0	15	0%
Verdelho	51	0	0	0	51	0%
Viognier	38	0	0	0	38	0%
Total white varieties	1,054	1	0	0	1,055	0%
Rootstock Block	6	0	0	0	6	0%
Unknown variety	36	0	0	0	36	0%
Total all varieties	5,815	25	23	33	5,895	1%

Langhorne Creek

Estimated supply and committed intake 2014 - 2018

Variety	2014				2016				2018			
	Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²			Est Supply ¹	Committed intake ²		
		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake		Winery grapes	Contract purchases	Total committed intake
Red winegrapes												
Cabernet Franc	115	5	0	5	115	5	0	5	115	5	0	5
Cabernet Sauvignon	14,595	6,705	8,907	15,613	14,670	7,122	7,429	14,551	14,670	7,122	5,881	13,003
Grenache	1,203	751	153	904	1,203	729	153	882	1,203	729	153	882
Malbec	409	107	369	476	461	107	606	712	461	107	610	717
Mataro	0	0	30	30	0	0	30	30	0	0	30	30
Merlot	3,801	2,283	1,313	3,595	3,805	2,398	1,551	3,950	3,805	2,398	1,327	3,726
Nebbiolo	126	9	0	9	126	10	22	32	126	10	22	32
Other red	803	0	143	143	811	0	99	99	811	0	99	99
Petit Verdot	226	26	27	54	226	26	27	54	226	26	27	54
Pinot Noir	951	391	1,161	1,552	951	411	997	1,408	951	411	213	624
Sangiovese	380	0	15	15	380	0	232	232	380	0	232	232
Shiraz	21,202	8,750	8,140	16,890	21,309	9,038	5,351	14,389	21,309	9,038	4,962	14,000
Tempranillo	0	0	13	13	0	0	13	13	0	0	13	13
Touriga	0	0	4	4	0	0	4	4	0	0	4	4
Total red winegrapes	43,810	19,028	20,276	39,305	44,055	19,847	16,515	36,362	44,055	19,847	13,574	33,421
White winegrapes												
Chardonnay	6,543	1,608	4,513	6,121	6,543	1,608	2,910	4,518	6,543	1,608	2,506	4,114
Chenin Blanc	0	17	0	17	0	17	0	17	0	17	0	17
Muscat A Petit Grains Blanc	0	22	0	22	0	22	0	22	0	22	0	22
Other white	449	40	89	129	453	40	34	74	453	40	34	74
Pinot Gris	416	54	296	350	416	54	198	251	416	54	198	251
Riesling	1,663	1,622	772	2,394	1,663	1,622	376	1,998	1,663	1,622	0	1,622
Sauvignon Blanc	775	388	593	981	775	446	296	742	775	446	296	742
Traminer	150	197	0	197	150	197	0	197	150	197	0	197
Verdelho	408	120	195	315	408	120	174	294	408	120	174	294
Viognier	380	17	215	233	380	17	70	87	380	17	70	87
Total white winegrapes	10,785	4,086	6,672	10,758	10,788	4,144	4,058	8,202	10,788	4,144	3,277	7,422
All winegrapes	54,595	23,115	26,948	50,063	54,844	23,991	20,573	44,564	54,844	23,991	16,851	40,843

¹ Supply forecast produced by PGIBSA based on the South Australian vineyard register

² A raising factor of 1.093 has been applied to committed intake to allow for non-respondents