

Langhorne Creek

LANGHORNE CREEK VINTAGE OVERVIEW

Vintage Report

The growing season in Langhorne Creek this year was very mild, being one of the coolest summers on record. Only a few rare days pushed the mercury above 35°C. The cool season with little rain meant disease was restricted to nothing more than the odd spot of easily controlled powdery mildew. Ideal weather throughout March and April (warm, sunny and dry) provided slow, even ripening of the fruit throughout vintage and a relatively smooth intake of grapes at optimum maturity. The cool summer resulted in a late start to vintage and slightly below average yields for both red and white varieties but the quality of the fruit was extremely pleasing. Cabernet Sauvignon in particular has produced some outstanding fruit this year showing fantastic varietal character, plenty of colour and superb flavours of mint, blackberry and cassis.

The Langhorne Creek reds are showing tannins that indicate the resulting wines will have great structure and a long cellar life.

Regional whites also fared well from the mild weather. They have excellent acid balance and attractive flavours and aroma.

John Pargeter

Overview of vintage statistics

Langhorne Creek produced 44,861 tonnes this year – of which nearly 40,000 tonnes were red varieties. The crush was 13% down on the high yielding 2001 vintage, but supply and demand were almost balanced.

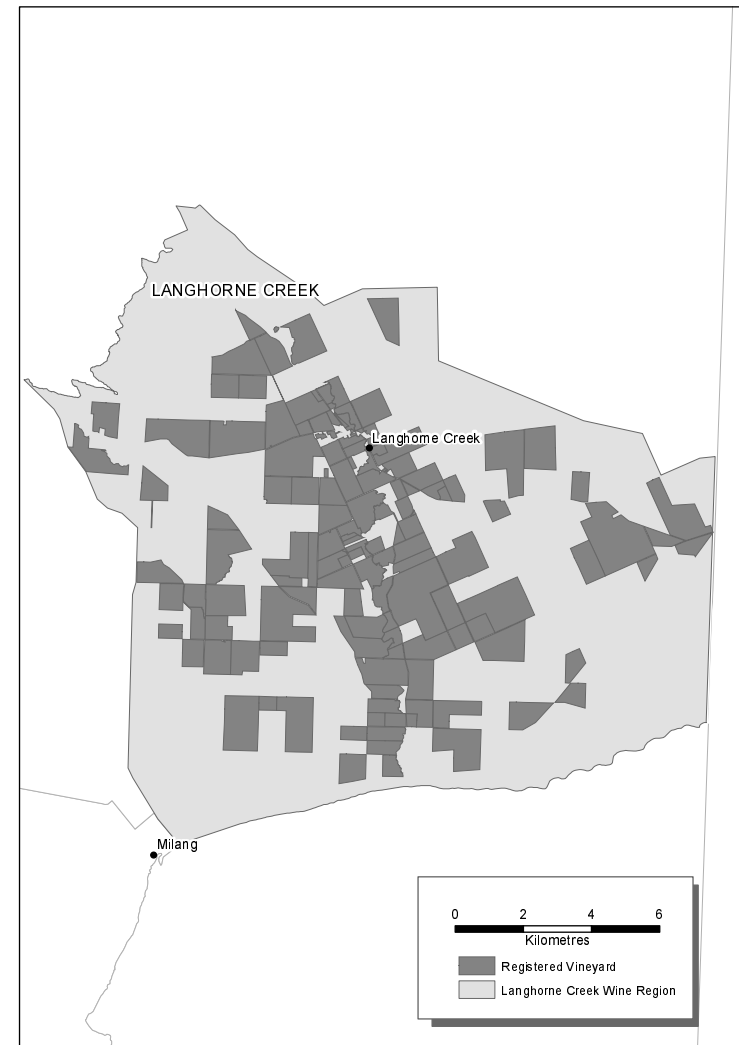
The weighted average weighbridge price (WAWP) for most of the major varieties was very similar to last year, although (as in many regions) the WAWP of Cabernet Sauvignon fell slightly. The lower tonnages meant that the total estimated weighbridge value of the harvest was about \$10 million lower than in 2001.

The forecast is for continued strong growth for the region, which is still one of the fastest growing in SA. Reds are expected to grow to nearly 60,000 tonnes by 2007, and there will still be a shortfall of 10,000 tonnes between supply and demand in five years. White varieties also show strong expected growth, with Chardonnay production expected to double between 2003 and 2007. As in Coonawarra, Cabernet Sauvignon is the principal variety, not Shiraz, although there were twice as many hectares of Shiraz planted in 2001 as Cabernet Sauvignon. Langhorne Creek is expected to overtake McLaren Vale as the second largest cool climate wine region in SA by 2007.

New plantings of white varieties reflect the strong anticipated growth in Chardonnay and Riesling, with a 24% increase in area of white varieties in the past year. (The state average growth for whites in the 2001 planting season was 7% - see table 1.8.)

It is estimated that a further 2000 hectares will need to be planted in the region by 2004 to meet the anticipated requirement of 79,000 tonnes in 2007 (assuming yield remains constant).

LANGHORNE CREEK WINE REGION



LANGHORNE CREEK TONNES CRUSHED BY VARIETY - VINTAGE 2002

Table 9.1

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for		
							Own	Purchased	Preferred
RED									
Cabernet Franc	83	103	186	187	55%	99%	3	5	7
Cabernet Sauvignon	6717	11514	18231	20215	63%	90%	12	26	31
Grenache	531	729	1260	1350	58%	93%	6	4	7
Malbec	60	215	275	317	78%	87%	3	9	10
Mataro	0	33	33	33	100%	100%	0	1	1
Merlot	1269	1333	2601	3191	51%	82%	10	15	20
Muscat Brown	6	0	6	15	0%	40%	1	0	1
Nebbiolo	0	5	5	5	100%	92%	0	1	1
Other red	3	9	12	12	75%	98%	1	1	2
Petit Verdot	207	282	489	369	58%	132%	9	8	14
Pinot Noir	310	87	397	542	22%	73%	3	2	5
Ruby Cabernet	0	13	13	13	100%	97%	0	1	1
Sangiovese	45	295	339	574	87%	59%	2	4	5
Shiraz	4046	11090	15136	16727	73%	90%	12	28	33
Zinfandel	0	31	31	31	100%	100%	0	1	1
Total RED	13275	25738	39013	43582	66%	90%			
WHITE									
Chardonnay	1797	2216	4013	3663	55%	110%	5	9	11
Chenin Blanc	9	23	32	15	73%	212%	1	1	1
Doradillo	0	9	9	0	100%		0	1	0
Muscadelle	0	3	3	4	100%	66%	0	1	1
Muscat Blanc	6	3	9	10	32%	88%	1	1	2
Palomino	0	7	7	9	100%	78%	0	1	1
Pedro Ximenes	0	5	5	8	100%	62%	0	1	1
Pinot Gris	0	18	18	30	100%	58%	0	1	1
Riesling	720	87	807	811	11%	100%	3	4	5
Sauvignon Blanc	5	30	36	53	85%	67%	1	3	3
Semillon	0	348	348	426	100%	82%	0	2	2
Traminer	0	29	29	12	100%	240%	0	2	1
Verdelho	127	320	447	627	72%	71%	3	6	7
Viognier	2	85	87	131	98%	66%	1	5	6
Total WHITE	2666	3182	5848	5799	54%	101%			
Grand Total (red and white)	15941	28920	44861	49380					

LANGHORNE CREEK PRICE AND BAUME DATA - VINTAGE 2002

Table 9.2

Variety (1)	Grower grown	Total crushed	weighted average		estimated total value		lowest price (2)	highest price (2)	weighted average	
			baumé		purchased grapes	total grapes			weighbridge price (3)	
RED										
Cabernet Franc	103	186	14.0	100%	\$105,769	\$190,621	\$611	\$1,300	\$1,025	100%
Cabernet Sauvignon	11,514	18,231	14.0	100%	\$16,840,255	\$26,663,795	\$700	\$2,400	\$1,463	100%
Grenache	729	1,260	13.1	100%	\$578,674	\$1,000,132	\$476	\$1,400	\$794	100%
Malbec	215	275	13.4	100%	\$294,146	\$375,813	\$1,000	\$1,780	\$1,366	100%
Mataro	33	33	14.5	100%	\$45,976	\$45,976			\$1,402	100%
Merlot	1,333	2,601	13.8	94%	\$1,841,582	\$3,595,001	\$930	\$1,670	\$1,382	100%
Nebbiolo	5	5	14.0	100%	\$5,544	\$5,544			\$1,200	100%
Other red	9	12			\$12,951	\$17,376			\$1,475	100%
Petit Verdot	282	489	13.4	100%	\$416,284	\$721,485	\$1,200	\$1,680	\$1,476	100%
Pinot Noir	87	397	11.6	100%	\$107,296	\$487,544			\$1,227	100%
Ruby Cabernet	13	13	13.6	100%	\$10,693	\$10,693			\$850	100%
Sangiovese	295	339	13.7	100%	\$441,282	\$508,112	\$1,200	\$1,670	\$1,497	100%
Shiraz	11,090	15,136	14.0	97%	\$16,087,431	\$21,956,364	\$650	\$3,500	\$1,451	100%
Zinfandel	31	31	15.0	100%	\$47,275	\$47,275			\$1,525	100%
Total RED	25,738	39,007				\$36,835,158		\$55,625,732		
WHITE										
Chardonnay	2,216	4,013	11.9	100%	\$2,828,484	\$5,123,124	\$1,100	\$1,600	\$1,277	100%
Chenin Blanc	23	32	11.0	100%	\$9,272	\$12,712			\$400	100%
Doradillo	9	9	10.4	100%	\$1,972	\$1,972			\$210	100%
Muscadelle	3	3	10.8	100%	\$1,310	\$1,310			\$500	100%
Muscat Blanc	3	9	11.3	100%	\$1,410	\$4,410			\$500	100%
Palomino	7	7	9.0	100%	\$1,971	\$1,971			\$280	100%
Pedro Ximenes	5	5	9.0	100%	\$1,380	\$1,380			\$280	100%
Pinot Gris	18	18	11.9	100%	\$21,900	\$21,900			\$1,250	100%
Riesling	87	807	11.8	100%	\$70,884	\$656,466	\$600	\$935	\$813	100%
Sauvignon Blanc	30	36	11.6	100%	\$28,995	\$34,188	\$900	\$1,000	\$962	100%
Semillon	348	348	12.5	100%	\$375,556	\$375,556			\$1,080	100%
Traminer	29	29	12.4	100%	\$15,543	\$15,543			\$541	100%
Verdelho	320	447	13.3	100%	\$356,977	\$498,419	\$850	\$1,375	\$1,115	100%
Viognier	85	87	14.0	100%	\$130,199	\$133,455	\$1,250	\$1,700	\$1,536	100%
Total WHITE	3,182	5,848				\$3,845,853		\$6,882,407		

(1) Only includes varieties where some fruit was purchased. Varieties where all fruit is winery grown are not shown in this table.

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

(3) This price does not include end use or other bonuses paid after the weighbridge.

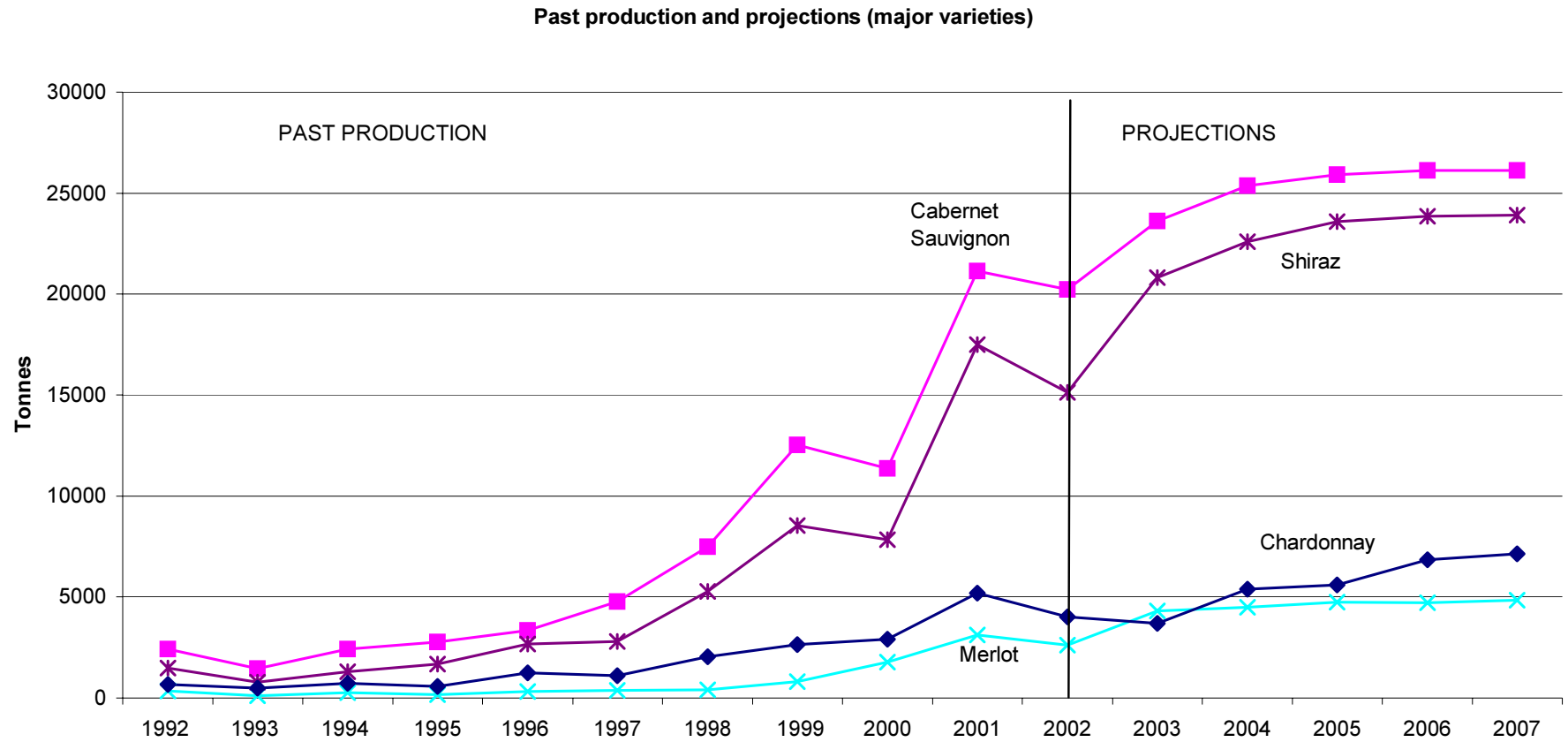
LANGHORNE CREEK ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2003 TO 2007

Table 9.3

Variety	2003		2004		2005		2006		2007	
	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred	estimated	preferred
RED										
Barbera	25	25	25	25	25	25	25	25	25	25
Cabernet Franc	213	198	213	198	213	198	213	198	213	198
Cabernet Sauvignon	23628	25072	25371	27361	25917	29208	26120	30555	26134	31819
Grenache	1135	726	1496	1079	1607	1199	1607	1199	1607	1199
Malbec	421	391	382	383	347	337	312	302	312	302
Mataro	29	29	31	31	31	31	31	31	31	31
Merlot	4315	4612	4493	4851	4750	5194	4712	5446	4840	5674
Muscat Brown	12	12	12	12	12	12	12	12	12	12
Nebbiolo	38	15	39	16	39	16	39	16	39	16
Other red	29	6	31	8	33	10	33	10	33	10
Petit Verdot	513	341	538	363	526	343	526	344	526	344
Pinot Noir	574	457	727	597	834	704	884	884	908	908
Ruby Cabernet	18	0	18	0	18	0	18	0	18	0
Sangiovese	529	249	551	251	530	210	370	210	370	210
Shiraz	20823	21579	22582	23682	23597	25514	23866	26975	23903	28393
Tempranillo	15	15	15	15	15	15	15	15	15	15
Total for RED	52319	53727	56525	58872	58495	63016	58784	66222	58987	69156
WHITE										
Chardonnay	3682	3721	5384	4941	5593	5707	6848	6974	7148	7288
Chenin Blanc	15	15	15	15	15	15	15	15	15	15
Doradillo	7	0	7	0	7	0	7	0	7	0
Muscadelle	3	0	3	0	3	0	3	0	3	0
Muscat Blanc	9	6	9	6	9	6	9	6	9	6
Palomino	7	0	7	0	7	0	7	0	7	0
Pedro Ximenes	5	0	5	0	5	0	5	0	5	0
Pinot Gris	55	55	55	55	25	55	25	55	25	55
Riesling	618	618	999	999	1342	1342	1542	1542	1542	1542
Sauvignon Blanc	60	80	60	82	70	84	36	48	44	53
Semillon	415	10	415	10	415	10	10	10	10	10
Traminer	11	200	301	300	387	400	523	500	523	500
Verdelho	688	408	691	413	693	418	425	423	427	428
Viognier	232	232	255	255	205	235	200	230	200	230
Total for WHITE	5807	5345	8206	7076	8776	8272	9655	9803	9965	10127

LANGHORNE CREEK PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1992 - 2007

Figure 9.1



LANGHORNE CREEK CURRENT PLANTINGS BY VARIETY AND YEAR PLANTED

Table 9.4

Variety	Year planted - area in hectares					Total	% planted in 2001
	Pre-98	1998	1999	2000	2001		
RED WINEGRAPES							
CABERNET FRANC	13	6	2	-	-	21	0%
CABERNET SAUVIGNON	1201	444	195	30	67	1937	3%
GRENACHE	38	-	45	21	1	104	1%
MALBEC	18	3	17	1	-	40	0%
MERLOT	205	111	43	-	-	359	0%
NEBBIOLO	0	1	9	-	1	11	6%
PETIT VERDOT	16	24	10	4	1	54	1%
PINOT NOIR	1	43	-	-	-	43	0%
SANGIOVESE	35	2	7	5	-	49	0%
SHIRAZ	786	637	174	63	128	1788	7%
OTHER RED	2	0	20	10	1	33	2%
TOTAL RED WINEGRAPES	2316	1272	521	134	198	4440	4%
WHITE WINEGRAPES							
CHARDONNAY	251	20	12	6	62	351	18%
RIESLING	5	14	30	-	66	116	57%
SEMILLON	21	10	3	-	-	34	0%
TRAMINER	1	-	-	-	15	16	94%
VERDELHO	46	1	10	6	-	62	0%
VIOGNIER	1	0	8	-	-	9	0%
OTHER WHITE	10	1	3	0	0	14	0%
TOTAL WHITE WINEGRAPES	335	46	66	12	143	602	24%
ROOTSTOCK BLOCK	0	1	-	-	-	1	0%
TOTAL ALL VARIETIES	2651	1317	587	146	340	5042	7%