

DEPARTMENT OF
PRIMARY INDUSTRIES



Australian Regional Wine Grape Crush Survey

2004

Victoria/N.S.W Murray Valley

The information contained in this survey was collected, analysed and published by Department of Primary Industries - Mildura, on behalf of the Murray Valley Wine Grape Industry Advisory Committee.

This report covers wine grapes grown in the designated Murray-Darling and Swan Hill wine regions of North West Victoria and South West New South Wales.

Additional copies are available from:

www.dpi.vic.gov.au

(path – Agriculture & Food / Horticulture / Wine & Grapes / Australian Regional Wine Grape Crush Survey)

Department of Primary Industries
Primary Industries Research Victoria
PO Box 905, Mildura Victoria 3502
Cnr Koorlong Avenue and Eleventh Street, Irymple.
Tel. (03) 5051 4500
Email: shc.mildura@dpi.vic.gov.au

Murray Valley Coordinator

Simone Crothers
Department of Primary Industries - Mildura

© State of Victoria, Department of Primary Industries, July 2004

This publication is copyright. Apart from fair dealing for the purpose of private study, research, criticism, or review, as permitted under the Copyright Act, no part may be reproduced by any process without the written permission of Department of Primary Industries, Victoria.

This publication may be of assistance to you, but the State of Victoria and its employees do not guarantee that the publication is written without flaw of any kind or is wholly appropriate for your particular purposes and therefore disclaims all liability for error, loss or other consequence which may arise from you relying on any information in this publication.

Cover design & layout by:

Adrian Dennis
PO Box SM34
Mildura South, Victoria 3500

INTRODUCTION

Wine grape crush surveys are carried out annually to provide early and accurate estimates of the tonnes and prices of grapes purchased and grown by wineries. These surveys also provide information on the estimated tonnes to be purchased and grown over each of the subsequent five years, together with an assessment of the tonnes that wine makers would prefer to receive.

Representatives of all known wineries provide the data on which the survey results are based immediately following vintage.

The survey is separately carried out for each state, with data being provided for each of a number of regions within these states. Each state collects the same data using identical survey forms thus making national aggregation possible.

The data is provided voluntarily by wineries on the understanding and guarantee that data for individual wineries will not be released. Only aggregated data is reported.

PRICE INFORMATION

The Weighted Average Weighbridge Price is calculated by dividing the total purchase price (post receipt price, not including freight or end use bonuses) of each variety by the total tonnes purchased of that variety.

Some apparent anomalies may appear in the price data. These generally arise because not all wineries reported all of the data requested.

DATA REQUESTED FROM WINERIES

Wineries are asked to provide the following information by variety and region:

Tonnes Purchased

The tonnages purchased from independent grape growers.

Tonnes Own Grown

The tonnages the winery itself has grown.

Tonnes Preferred

The tonnages the wineries would have preferred to crush in the current vintage.

Estimates of expected and preferred crush for the next 5 years

The tonnages wineries expect to crush, and would prefer to crush for the next five years assuming no limitations on equipment, supplies etc.

Purchase Prices

The highest and lowest price paid for each variety and the total purchase value (post receipt price, not including freight or end use bonuses) for each variety purchased.

DATA QUALITY

Responses were not received from all wineries sent survey forms and some wineries may not have been approached. The absolute tonnages should, therefore, be treated with care. A proportion of wineries did not supply all the data requested. This was particularly true of price data and future estimates.

The data has been checked exhaustively to eliminate transcription and analysis errors and to reduce, where possible, errors in data supplied by wineries. The data on the current vintage can be considered as accurate as possible.

The forecasts are a snapshot of the views of wine makers or company executives at the time of the survey. They are subject to variation with market fluctuations and changes in production over subsequent years. The forecasts are imperfect and will almost certainly vary with time.

DATA TREATMENT

All data provided by the wineries has been aggregated. Under an agreement with the wineries covering the provision of data, disaggregation is not permitted. It is not possible to provide data from individual wineries.

TABLE OF CONTENTS

Section 1	Summary Data & Yearly Trends	3
	Total tonnes crushed and total crop value	5
	Actual and preferred tonnages since 1999	5
	Historical trends in production.....	6
	Historical trends in estimated value of production	6
	Actual and preferred tonnages by variety	7
	Percentage of total crush by variety.....	8
Section 2	Price & Tonnage Data.....	9
	Notes on information provided in Section 2	11
	Total tonnes by variety for white grapes	13
	Total tonnes by variety for red grapes	14
	Price data for white grapes	15
	Price data for red grapes	16
	Price data for white grapes from Sunraysia wineries.....	17
	Price data for red grapes from Sunraysia wineries.....	18
Section 3	Estimates of Expected & Preferred Intakes for the Next 5 Years	19
	Notes on information provided in Section 3	21
	Estimated future winery production and purchases of white grapes	23
	Estimated future winery production and purchases of red grapes	24
	Expected and preferred future intakes of white grapes	25
	Expected and preferred future intakes of red grapes	26
Section 4	Trend Graphs for Selected Varieties.....	27
	Notes on information provided in Section 4	29
	List of Wineries Returning Survey Forms	41

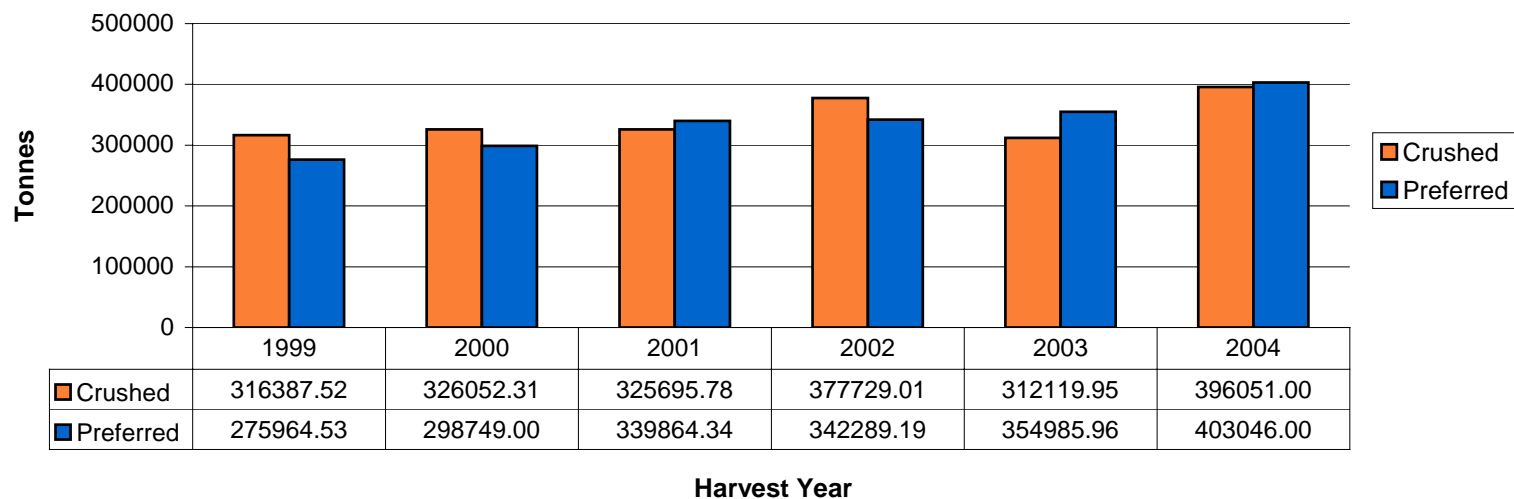


Summary Data and Yearly Trends 2004

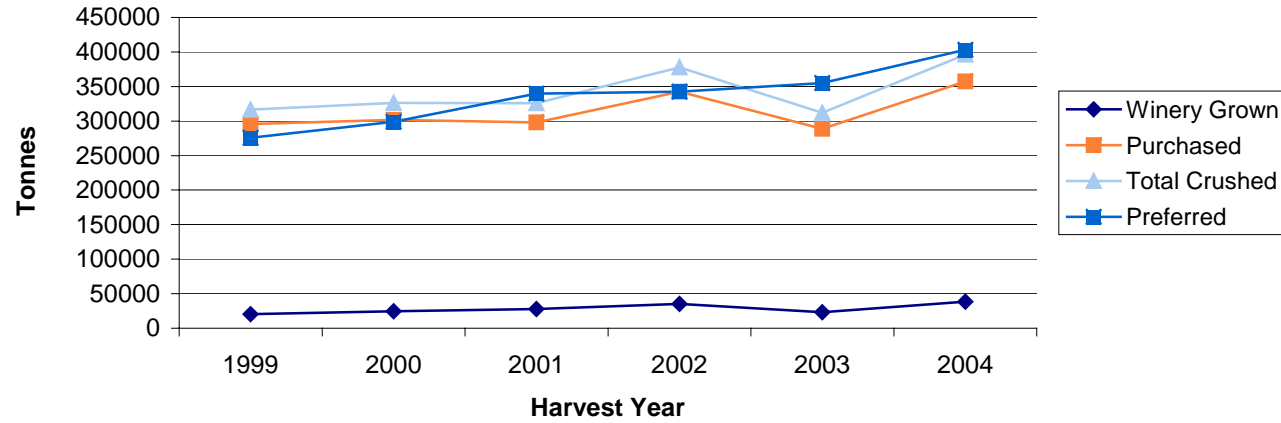
TOTAL TONNES CRUSHED AND TOTAL CROP VALUE

	Total winery grown	Total purchased	Total crushed	Total preferred	Tonnes from other growers as a % of total	% of demand supplied	Estimated value of purchased grapes	Estimated value of total crush
Red								
Sum	19370	146196	165566	158742	88%	104%	\$79,887,029	\$90,508,741
Percent	50.1%	40.9%	41.8%	39.4%				
White								
Sum	19255	211229	230485	244304	92%	94%	\$120,699,552	\$134,212,731
Percent	49.9%	59.1%	58.2%	60.6%				
Total	38625	357425	396051	403046			\$200,586,581	\$224,721,472

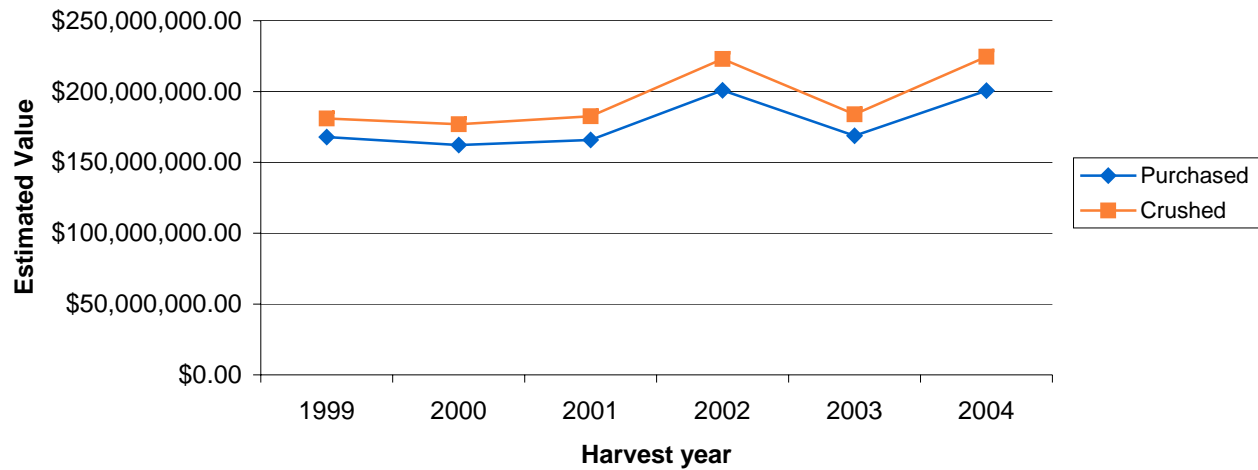
ACTUAL & PREFERRED TONNAGES SINCE 1999



HISTORICAL TRENDS IN PRODUCTION

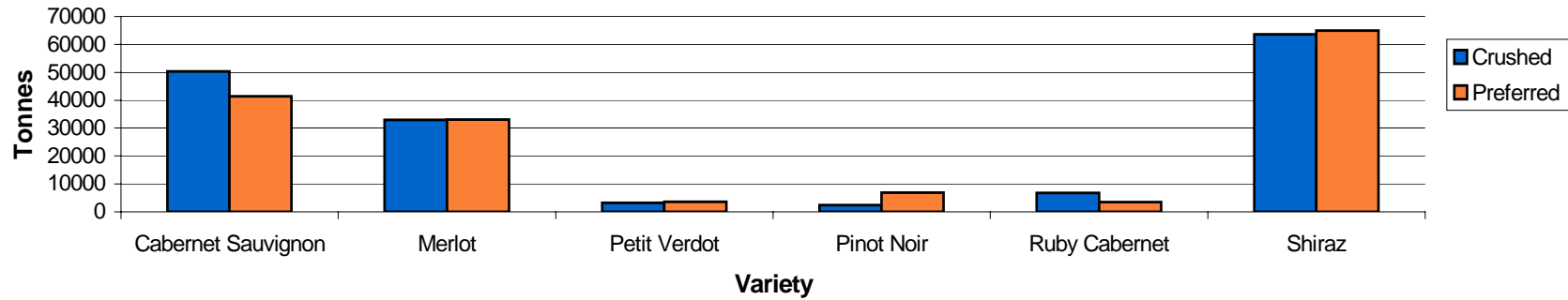


HISTORICAL TRENDS IN ESTIMATED VALUE OF PRODUCTION

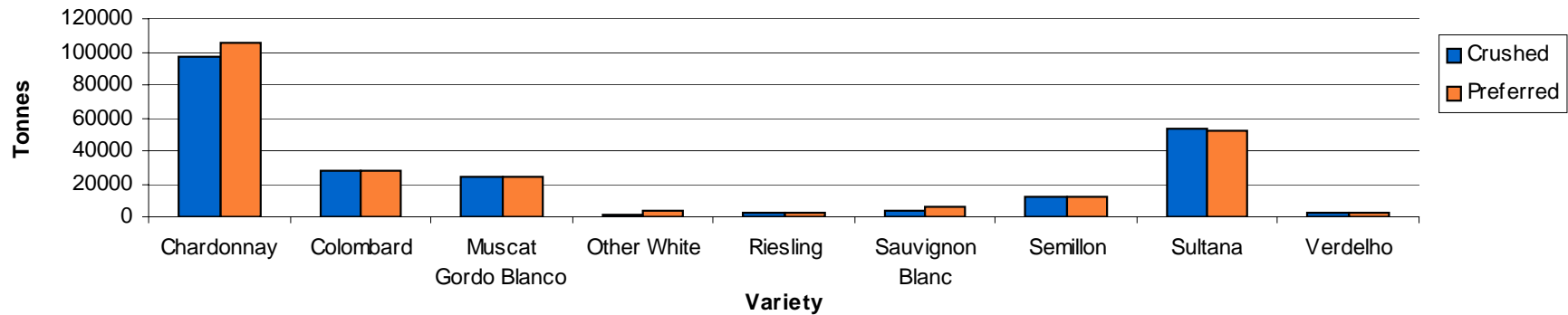


ACTUAL & PREFERRED TONNAGES BY VARIETY - 2004 VINTAGE

Red Varieties



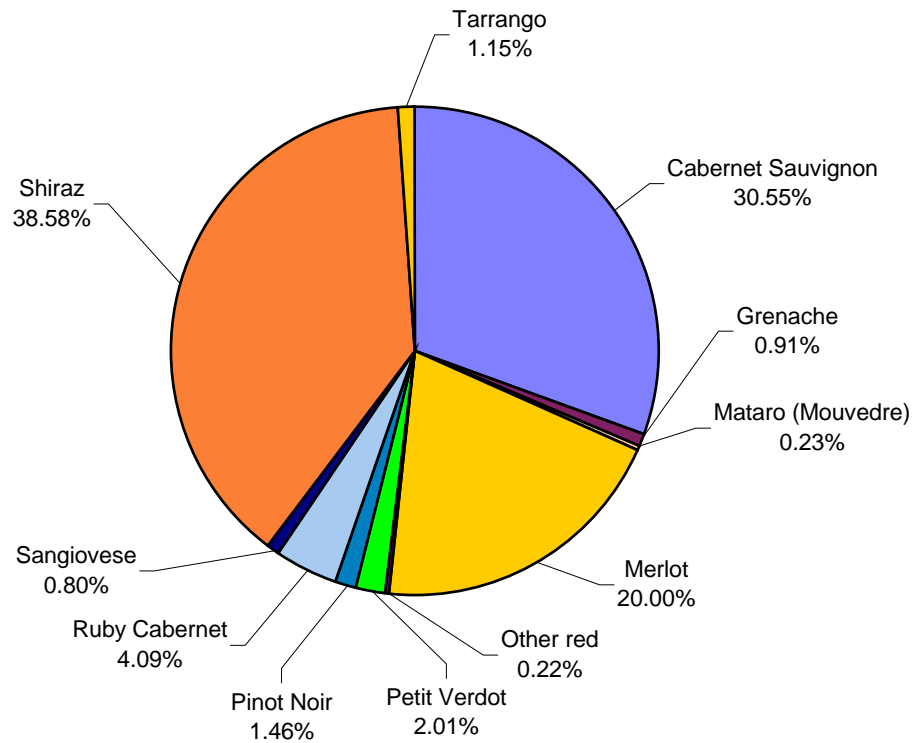
White Varieties



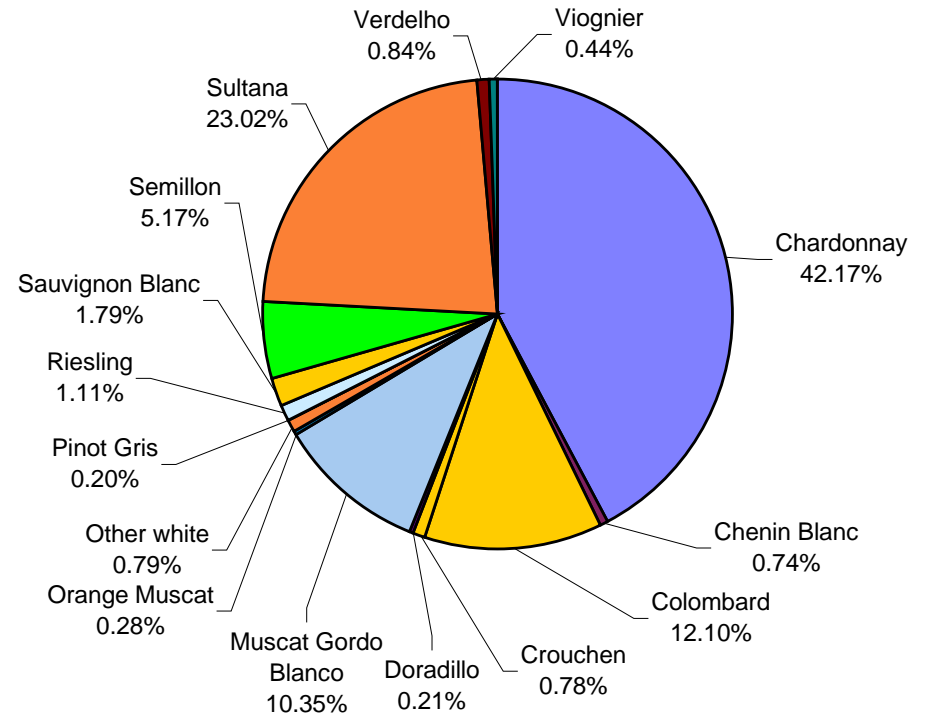
Note: Varieties with both total crushed and preferred less than 2000 tonnes are not represented in these graphs.

PERCENTAGE OF TOTAL CRUSH BY VARIETY

Red Varieties



White Varieties



Note: Varieties with a total crush less than 200 tonnes are not represented in these graphs.



Price and Tonnage Data 2004

NOTES ON INFORMATION PROVIDED IN SECTION 2

PRICE AND TONNAGE DATA

Tonnes from other growers as % of total

This statistic is calculated by dividing the tonnes purchased from independent growers (total other growers) by the total tonnes crushed. This figure is then expressed as a percentage. It indicates the proportion of grapes purchased from independent growers.

% of demand supplied

Calculated as total tonnes crushed divided by the total tonnes preferred and expressed as a percentage.

A value of 100% means that supply and demand were equal. A greater value means that more of the variety was purchased than would have been preferred, while a lesser value means wineries would have bought more if available.

Weighted average weighbridge price

Calculated by dividing the total purchase value (post receipt price, not including freight or end use bonuses) for a variety (summed across all wineries) by the total tonnes of the same variety purchased from other growers.

Winery grown grapes are not included in the calculation of weighted average weighbridge price.

The weighted district average price in this report is calculated from data that is known to be incomplete. Therefore, it is possible that the calculated weighted district average price is biased due to the incomplete data.

Lowest and highest prices

This is the lowest and highest price paid per tonne reported only when prices were quoted for a particular variety by 3 or more wineries.

Estimated total value of purchased grapes

Calculated as the weighted average weighbridge price multiplied by the total tonnes purchased.

Estimated value of total crush

Calculated as the sum of weighted average weighbridge price multiplied by the total tonnes crushed, for each variety.

Discrepancies will appear in the estimated total value of all grapes and the estimated total value of purchased grapes if the average price is calculated.

In a number of cases, wineries have crushed varieties that they have grown but not purchased. In this case, a price is not available and the value of those grapes has not been included in the estimated value of the total crush.

TOTAL TONNES BY VARIETY FOR WHITE GRAPES

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)		
							Own	Other	Preferred
Canada Muscat	79	0	79	79	0%	100%	1	0	1
Chardonnay	9681	87335	97016	105557	90%	92%	9	24	24
Chenin Blanc	0	1711	1711	1584	100%	108%	0	8	7
Colombard	1028	26811	27839	28438	96%	98%	4	14	14
Crouchen	607	1198	1805	1502	66%	120%	3	2	3
Doradillo	0	483	483	0	100%		0	2	0
Flora	101	0	101	60	0%	169%	1	0	1
Muscat Blanc (Frontignac)	3	12	14	514	82%	3%	1	1	2
Muscat Gordo Blanco	275	23549	23824	24489	99%	97%	3	16	17
Orange Muscat	459	189	648	240	29%	270%	1	1	1
Other white	28	1786	1814	3662	98%	50%	2	4	5
Pedro Ximenes	27	0	27	27	0%	100%	1	0	1
Pinot Gris	28	436	464	1446	94%	32%	1	4	5
Riesling	75	2480	2555	2578	97%	99%	2	10	10
Sauvignon Blanc	893	3235	4128	5660	78%	73%	4	8	11
Semillon	5438	6465	11904	12263	54%	97%	6	11	11
Sultana	0	52959	52959	52229	100%	101%	0	19	19
Taminga	12	0	12	10	0%	120%	1	0	1
Traminer	0	169	169	169	100%	100%	0	1	1
Verdelho	342	1581	1923	2649	82%	73%	1	6	7
Viognier	179	832	1011	1147	82%	88%	3	6	8
TOTAL	19255	211229	230485	244304	92%	94%			

TOTAL TONNES BY VARIETY FOR RED GRAPES

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)		
							Own	Other	Preferred
Black Muscat	0	131	131	73	100%	179%	0	1	1
Cabernet Franc	0	0	0	11		0%	0	0	1
Cabernet Sauvignon	4722	45658	50380	41450	91%	122%	9	22	22
Carina	0	30	30	30	100%	100%	0	1	1
Chambourcin	0	129	129	45	100%	286%	0	2	1
Durif	0	3	3	3	100%	100%	0	1	1
Gamay	0	4	4	4	100%	100%	0	1	1
Grenache	195	1303	1498	1371	87%	109%	4	9	7
Malbec	19	64	83	83	77%	99%	1	2	3
Mataro (Mouvedre)	24	349	373	270	94%	138%	1	5	5
Merlot	4249	28737	32986	33119	87%	100%	8	20	20
Nebbiolo	39	44	83	64	53%	130%	2	1	2
Other red	253	116	369	335	31%	110%	4	1	2
Petit Verdot	471	2838	3309	3610	86%	92%	3	9	11
Pinot Noir	269	2145	2414	6841	89%	35%	2	5	7
Rubired	0	21	21	21	100%	102%	0	1	1
Ruby Cabernet	1601	5151	6752	3553	76%	190%	3	12	9
Sangiovese	225	1098	1323	965	83%	137%	2	8	6
Shiraz	6417	57214	63632	64949	90%	98%	10	25	25
Tarrango	803	1096	1899	1877	58%	101%	1	1	1
Tempranillo	81	60	141	62	43%	228%	1	2	2
Touriga	3	2	5	4	33%	118%	1	1	1
Zinfandel	0	1	1	1	100%	100%	0	1	1
TOTAL	19370	146196	165566	158742	88%	104%			

PRICE SUMMARY DATA FOR WHITE GRAPES

Variety	Total purchased (t)	Total crushed (t)	Estimated total value purchased grapes	Estimated total value total grapes	Lowest price	Highest price	**Weighted average weighbridge price per tonne	
Chardonnay	87335	97016	\$76,956,080	\$85,486,567	\$600	\$1,200	\$881	96%
Chenin Blanc	1711	1711	\$644,285	\$644,285	\$250	\$420	\$377	94%
Colombard	26811	27839	\$9,502,559	\$9,866,864	\$220	\$460	\$354	95%
Crouchen	1198	1805	\$597,169	\$899,796			\$498	100%
Doradillo	483	483	\$122,304	\$122,304			\$253	100%
Muscat Blanc (Frontignac)	12	14	\$4,140	\$5,030			\$350	100%
Muscat Gordo Blanco	23549	23824	\$8,278,021	\$8,374,743	\$253	\$449	\$352	100%
Orange Muscat	189	648	\$245,700	\$841,706			\$1,298	100%
Other white	1786	1814	\$560,505	\$569,294			\$314	100%
Pinot Gris	436	464	\$302,524	\$321,963	\$550	\$900	\$694	99%
Riesling	2480	2555	\$1,254,089	\$1,292,018	\$350	\$650	\$506	100%
Sauvignon Blanc	3235	4128	\$1,668,311	\$2,128,911	\$450	\$595	\$516	100%
Semillon	6465	11904	\$3,285,534	\$6,049,013	\$300	\$1,196	\$508	100%
Sultana	52959	52959	\$15,653,359	\$15,653,359	\$200	\$366	\$296	98%
Traminer	169	169	\$88,536	\$88,536			\$525	100%
Verdelho	1581	1923	\$750,891	\$913,335	\$380	\$650	\$475	100%
Viognier	832	1011	\$785,545	\$955,008	\$700	\$1,200	\$944	100%
TOTAL	211229	230266	\$120,699,552	\$134,212,731				

** The weighted average weighbridge price in this report is calculated from data that is known to be incomplete. Therefore, it is possible that the calculated weighted average price is biased due to the incomplete data.

PRICE SUMMARY DATA FOR RED GRAPES

Variety	Total purchased (t)	Total crushed (t)	Estimated total value purchased grapes	Estimated total value total grapes	Lowest price	Highest price	** Weighted average weighbridge price per tonne	
Black Muscat	131	131	\$97,514	\$97,514			\$745	100%
Cabernet Sauvignon	45658	50380	\$22,245,074	\$24,545,665	\$178	\$1,050	\$487	100%
Carina	30	30	\$11,948	\$11,948			\$400	100%
Chambourcin	129	129	\$46,203	\$46,203			\$357	100%
Durif	3	3	\$2,610	\$2,610			\$750	100%
Gamay	4	4	\$1,042	\$1,042			\$280	100%
Grenache	1303	1498	\$609,966	\$701,087	\$250	\$920	\$468	100%
Malbec	64	83	\$29,028	\$37,703			\$457	100%
Mataro (Mouvedre)	349	373	\$139,329	\$148,917	\$325	\$920	\$399	100%
Merlot	28737	32986	\$15,362,059	\$17,633,500	\$178	\$930	\$535	97%
Nebbiolo	44	83	\$22,768	\$42,794			\$513	100%
Other red	116	369	\$104,715	\$332,523			\$900	100%
Petit Verdot	2838	3309	\$1,007,181	\$1,174,204	\$300	\$520	\$355	96%
Pinot Noir	2145	2414	\$1,081,964	\$1,217,672	\$425	\$576	\$504	100%
Rubired	21	21	\$10,272	\$10,272			\$480	100%
Ruby Cabernet	5151	6752	\$2,451,897	\$3,213,941	\$246	\$1,015	\$476	100%
Sangiovese	1098	1323	\$445,796	\$537,170	\$250	\$600	\$406	91%
Shiraz	57214	63632	\$35,489,750	\$39,470,282	\$200	\$1,003	\$620	96%
Tarrango	1096	1899	\$690,682	\$1,196,203			\$630	100%
Tempranillo	60	141	\$35,784	\$83,852			\$593	100%
Touriga	2	5	\$1,097	\$3,290			\$700	100%
Zinfandel	1	1	\$350	\$350			\$350	100%
TOTAL	146196	165566	\$79,887,029	\$90,508,741				

** The weighted average weighbridge price in this report is calculated from data that is known to be incomplete. Therefore, it is possible that the calculated weighted average price is biased due to the incomplete data.

PRICE SUMMARY DATA FOR WHITE GRAPES FROM SUNRAYZIA WINERIES

Variety	Total purchased (t)	Total crushed (t)	Estimated total value purchased grapes	Estimated total value total grapes	Lowest price	Highest price	**Weighted average weighbridge price per tonne	
Chardonnay	65853	75104	\$57,515,523	\$65,595,749	\$600	\$1,200	\$873	95%
Chenin Blanc	808	808	\$262,840	\$262,840	\$300	\$360	\$325	88%
Colombard	24762	25750	\$8,760,673	\$9,110,093	\$220	\$460	\$354	94%
Crouchen	24	56	\$8,410	\$19,611			\$350	100%
Doradillo	483	483	\$122,304	\$122,304			\$253	100%
Muscat Blanc (Frontignac)	12	14	\$4,140	\$5,030			\$350	100%
Muscat Gordo Blanco	18836	19111	\$6,751,257	\$6,849,878	\$253	\$449	\$358	100%
Other white	1736	1764	\$546,755	\$555,576			\$315	100%
Pinot Gris	112	140	\$76,079	\$95,041	\$550	\$900	\$677	97%
Riesling	1328	1403	\$667,363	\$705,052	\$350	\$557	\$503	100%
Sauvignon Blanc	2171	3064	\$1,106,314	\$1,561,428	\$450	\$595	\$510	100%
Semillon	5117	10555	\$2,531,921	\$5,222,973	\$300	\$720	\$495	100%
Sultana	46703	46703	\$13,925,879	\$13,925,879	\$230	\$366	\$298	100%
Traminer	169	169	\$88,536	\$88,536			\$525	100%
Verdelho	994	1336	\$510,641	\$686,357	\$380	\$650	\$514	100%
Viognier	360	540	\$330,673	\$495,312	\$700	\$1,200	\$917	100%
TOTAL	167884	185391	\$93,209,308	\$105,301,660				

** The weighted average weighbridge price in this report is calculated from data that is known to be incomplete. Therefore, it is possible that the calculated weighted average price is biased due to the incomplete data.

PRICE SUMMARY DATA FOR RED GRAPES FROM SUNRAYSIA WINERIES

Variety	Total purchased (t)	Total crushed (t)	Estimated total value purchased grapes	Estimated total value total grapes	Lowest price	Highest price	** Weighted average weighbridge price per tonne	
Black Muscat	131	131	\$97,514	\$97,514			\$745	100%
Cabernet Sauvignon	34549	38924	\$17,837,888	\$20,096,541	\$200	\$1,050	\$516	100%
Carina	30	30	\$11,948	\$11,948			\$400	100%
Chambourcin	84	84	\$33,536	\$33,536			\$399	100%
Durif	3	3	\$2,610	\$2,610			\$750	100%
Grenache	669	827	\$290,777	\$359,359	\$250	\$920	\$435	100%
Malbec	64	83	\$29,028	\$37,703			\$457	100%
Mataro (Mouvedre)	250	274	\$104,560	\$114,612	\$325	\$920	\$419	100%
Merlot	19138	22688	\$10,590,021	\$12,554,420	\$300	\$930	\$553	95%
Nebbiolo	44	83	\$22,768	\$42,794			\$513	100%
Petit Verdot	1720	2191	\$556,799	\$709,182	\$300	\$475	\$324	93%
Pinot Noir	1619	1888	\$818,293	\$954,281	\$425	\$576	\$506	100%
Rubired	21	21	\$10,272	\$10,272			\$480	100%
Ruby Cabernet	4266	5867	\$2,169,175	\$2,983,221	\$246	\$1,015	\$508	100%
Sangiovese	602	827	\$285,726	\$392,560	\$325	\$600	\$475	84%
Shiraz	46181	52205	\$29,159,772	\$32,963,558	\$200	\$1,003	\$631	94%
Tempranillo	38	118	\$17,448	\$55,257			\$467	100%
Touriga	2	5	\$1,097	\$3,290			\$700	100%
TOTAL	109410	126249	\$62,039,232	\$71,422,657				

** The weighted average weighbridge price in this report is calculated from data that is known to be incomplete. Therefore, it is possible that the calculated weighted average price is biased due to the incomplete data.



Estimates of Expected and Preferred Intakes for Next 5 Years **2004**

NOTES ON INFORMATION PROVIDED IN SECTION 3

ESTIMATES OF EXPECTED AND PREFERRED INTAKES FOR THE NEXT FIVE YEARS

Winery grown / purchased

The estimated tonnages for each variety that wineries expect to grow themselves and purchase from independent growers each year for the next 5 years.

The estimates are provided as at June and will be subject to variation over time with changes in market requirements and supply.

Not all wineries provide estimates of future intakes. The number of wineries providing this information tends to decrease further for later years.

The estimates should be interpreted and used cautiously. They should not be relied upon in making decisions about future production.

Expected and preferred

The expected value is the estimated total tonnes to be crushed in each of the forecast years.

The preferred value is the estimated total tonnes the wineries would prefer to crush for each of the forecast years.

Note: Some varieties not known to be in short supply may be reported as such in the survey as a reflection of the availability of grapes at the quality standards expected.

ESTIMATED FUTURE WINERY PRODUCTION AND PURCHASES OF WHITE GRAPES

Variety	2005			2006			2007			2008			2009							
	Winery grown	Purchased		Winery grown	Purchased		Winery grown	Purchased		Winery grown	Purchased		Winery grown	Purchased						
Canada Muscat	170	100%	0	170	100%	1354	170	100%	1377	170	100%	1399	170	100%	1399					
Chardonnay	9985	100%	98014	97%	12241	100%	125176	97%	14667	100%	131672	97%	19138	100%	134624	97%	21624	100%	134775	97%
Chenin Blanc	0		1274	100%	0		3137	100%	0		3589	100%	0		3418	100%	0		3381	96%
Colombard	948	100%	29429	98%	954	100%	29378	98%	978	100%	29665	98%	1014	100%	28766	98%	1081	99%	28592	97%
Crouchen	779	100%	1008	100%	814	100%	1033	100%	819	100%	1050	100%	819	100%	1050	100%	798	97%	1017	98%
Doradillo	0		221	50%	0		94	50%	0		94	50%	0		94	50%	0		94	50%
Flora	95	100%	0		95	100%	0		95	100%	0		95	100%	0		95	100%	0	
Mixed white	0		6756		0		6967		0		7062		0		7165		0		7165	
Muscat Blanc	3	100%	19	100%	3	100%	661	100%	3	100%	714	100%	3	100%	731	100%	0		685	0%
Muscat Gordo Blanco	236	100%	25455	100%	236	100%	27925	100%	236	100%	28374	100%	236	100%	29821	100%	222	95%	29683	99%
Orange Muscat	440	100%	110	100%	440	100%	110	100%	440	100%	110	100%	440	100%	110	100%	440	100%	110	100%
Other white	43	100%	307	13%	3	11%	310	11%	4	11%	313	11%	4	11%	273	11%	4	11%	276	11%
Pedro Ximenes	27	100%	0		27	100%	0		27	100%	0		27	100%	0					
Pinot Gris	40	100%	1403	100%	94	100%	2881	100%	202	100%	3232	100%	445	100%	3373	100%	580	100%	3373	100%
Riesling	94	100%	1939	95%	153	100%	1900	95%	271	100%	2014	95%	537	100%	2064	95%	684	100%	2072	94%
Sauvignon Blanc	784	100%	2957	99%	1074	100%	3580	99%	1924	100%	4272	99%	3712	100%	5275	99%	4724	100%	5995	99%
Semillon	5797	100%	6362	100%	5704	100%	7062	100%	5776	100%	8877	100%	5872	100%	10249	100%	5976	100%	11554	99%
Sultana	0		41973	93%	0		39657	92%	0		38958	92%	0		38330	92%	0		37335	91%
Taminga	10	100%	0		10	100%	0		12	100%	0		12	100%	0		14	100%	0	
Traminer	0		262	100%	0		816	100%	0		849	100%	0		884	100%	0		884	100%
Verdelho	340	100%	1217	100%	205	100%	1368	100%	205	100%	1375	100%	205	100%	1383	100%	205	100%	1390	100%
Viognier	248	100%	817	97%	272	100%	1153	97%	314	100%	1294	97%	329	100%	1422	97%	363	100%	1533	97%
TOTAL	20039		219523		22495		254562		26143		264891		33058		270431		36980		271313	

ESTIMATED FUTURE WINERY PRODUCTION AND PURCHASES OF RED GRAPES

Variety	2005			2006			2007			2008			2009	
	Winery grown	Purchased		Winery grown	Purchased		Winery grown	Purchased		Winery grown	Purchased		Winery grown	Purchased
Black Muscat	0	269	100%	0	229	100%	0	234	100%	0	185	100%		
Cabernet Sauvignon	5601	45806	98%	5524	43565	98%	5570	49685	98%	5657	46926	98%	5724	46263
Durif	0	44	100%	10	52	100%	30	64	100%	75	55	100%	100	
Grenache	182	2397	100%	232	2398	100%	239	2401	100%	263	2424	100%	294	2359
Malbec	68	11	100%	86	11	100%	95	11	100%	95	11	100%	95	100%
Mataro (Mouvedre)	101	320	98%	113	801	98%	124	853	98%	148	832	98%	188	725
Merlot	3618	27293	97%	3375	28095	97%	3818	29390	97%	4799	32558	97%	5306	32408
Nebbiolo	35	0	100%	20	0	100%	20	0	100%	30	0	100%	30	0
Other red	383	110	100%	516	110	100%	835	110	100%	1255	110	100%	1475	110
Petit Verdot	375	2901	100%	312	2895	100%	312	2962	100%	312	2980	100%	312	2999
Pinot Noir	260	2420	100%	200	3231	100%	200	3238	100%	220	3260	100%	230	3260
Rubired	0	10	100%	0	10	100%	0	10	100%	0	10	100%		
Ruby Cabernet	1643	3818	94%	2202	2763	94%	1417	3244	94%	1417	2975	94%	1417	2589
Sangiovese	236	883	100%	236	793	100%	236	828	100%	236	848	98%	236	901
Shiraz	6012	58324	98%	6259	72831	98%	6783	77987	98%	7706	89533	98%	8183	88078
Tarrango	720	1185	100%	830	1429	100%	1091	1575	100%	1300	1595	100%	1550	1595
Tempranillo	60	80	100%	50	80	100%	50	130	100%	50	130	100%	50	130
Touriga	3	1	100%	3	1	100%	3	1	100%	3	1	100%		
TOTAL	19297	145871		19968	159293		20823	172722		23566	184432		25190	181416

ESTIMATED AND PREFERRED FUTURE INTAKES OF WHITE GRAPES

Variety	2005		2006		2007		2008		2009	
	Estimated	Preferred	Estimated	Preferred	Estimated	Preferred	Estimated	Preferred	Estimated	Preferred
Canada Muscat	170	170	1524	1524	1547	1547	1569	1569	1569	1569
Chardonnay	107999	104249	137417	131544	146339	139067	153762	144285	156399	148441
Chenin Blanc	1274	984	3137	2949	3589	3574	3418	3553	3381	3668
Colombard	30377	21269	30332	22562	30643	24603	29780	26110	29673	28120
Crouchen	1787	1713	1847	1813	1869	1913	1869	1913	1815	1913
Doradillo	221	0	94	0	94	0	94	0	94	0
Flora	95	63	95	66	95	72	95	77	95	82
Mixed white	6756	6756	6967	6967	7062	7062	7165	7165	7165	7165
Muscat Blanc	22	500	664	1137	717	1268	734	1285	685	1285
Muscat Gordo Blanco	25691	19383	28161	21863	28610	22438	30057	24307	29905	24645
Orange Muscat	550	251	550	266	550	286	550	307	550	328
Other white	350	1761	313	1750	317	1674	277	1665	280	1665
Pedro Ximenes	27		27		27		27			
Pinot Gris	1443	1403	2975	2881	3434	3232	3818	3373	3953	3373
Riesling	2033	1941	2053	1798	2285	1820	2601	1820	2756	1878
Sauvignon Blanc	3741	4449	4654	5014	6196	5709	8987	6144	10719	6554
Semillon	12159	10507	12766	11894	14653	14079	16121	15647	17530	17708
Sultana	41973	21061	39657	18728	38958	18043	38330	18038	37335	17406
Taminga	10	10	10	10	12	12	12	12	14	14
Traminer	262	262	816	816	849	849	884	884	884	884
Verdelho	1557	1595	1573	1768	1580	1770	1588	1783	1595	1783
Viognier	1065	584	1425	933	1608	1088	1751	1230	1896	1374
TOTAL	239562	198911	277057	236283	291034	250106	303489	261167	308293	269855

** The Estimated and Preferred intakes in this report are calculated from data that is known to be incomplete as not all wineries provide estimates of future production and/or preferred intakes. Therefore, it is possible that the reported Estimated and Preferred figures are biased due to the incomplete data.

ESTIMATED AND PREFERRED FUTURE INTAKES OF RED GRAPES

Variety	2005		2006		2007		2008		2009	
	Estimated	Preferred	Estimated	Preferred	Estimated	Preferred	Estimated	Preferred	Estimated	Preferred
Black Muscat	269		229		234		185			
Cabernet Franc	0	10	0	11	0	10	0	10	0	10
Cabernet Sauvignon	51407	42599	49089	43860	55255	51441	52583	55160	51987	58646
Durif	44		62		94		130		100	
Grenache	2579	2382	2630	2368	2640	2391	2687	2468	2653	2508
Malbec	79	30	97	86	106	95	106	95	95	95
Mataro (Mouvedre)	421	222	914	778	977	822	980	873	913	913
Merlot	30911	25360	31470	26004	33208	27456	37357	30663	37714	31423
Nebbiolo	35	20	20	20	20	20	30	30	30	30
Other red	493	448	626	610	945	925	1365	1340	1585	1565
Petit Verdot	3276	1738	3207	1818	3274	1931	3292	1866	3311	1608
Pinot Noir	2680	5632	3431	6281	3438	6133	3480	6122	3490	6132
Rubired	10		10		10		10			
Ruby Cabernet	5461	743	4965	2364	4661	424	4392	424	4006	434
Sangiovese	1119	373	1029	217	1064	328	1084	326	1137	356
Shiraz	64336	66542	79090	84075	84770	89960	97239	103920	96261	104802
Tarrango	1905	2066	2259	2271	2666	2559	2895	2894	3145	3151
Tempranillo	140	62	130	62	180	112	180	112	180	112
Touriga	4		4		4		4			
TOTAL	165168	148227	179261	170825	193545	184607	207998	206303	206606	211785

** The Estimated and Preferred intakes in this report are calculated from data that is known to be incomplete as not all wineries provide estimates of future production and/or preferred intakes. Therefore, it is possible that the reported Estimated and Preferred figures are biased due to the incomplete data.



Trend Graphs for Selected Varieties 2004

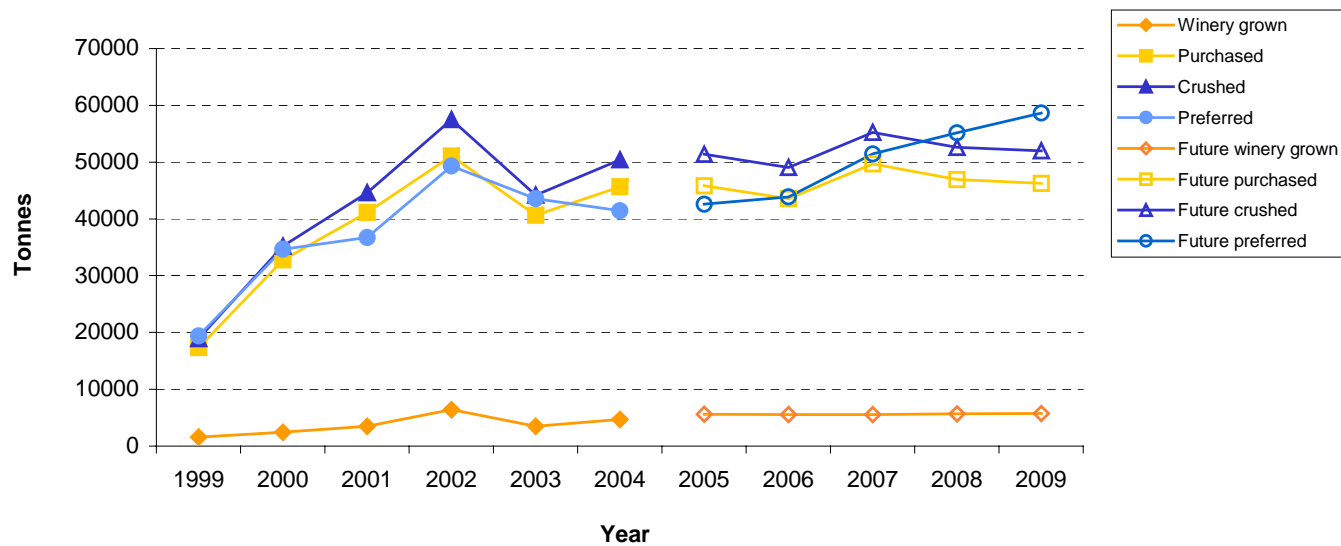
NOTES ON INFORMATION PROVIDED IN SECTION 4

The following graphs show the historical trends in tonnages for the 5 years preceding the current vintage where data exists, and for the next 5 years where forecast data is available.

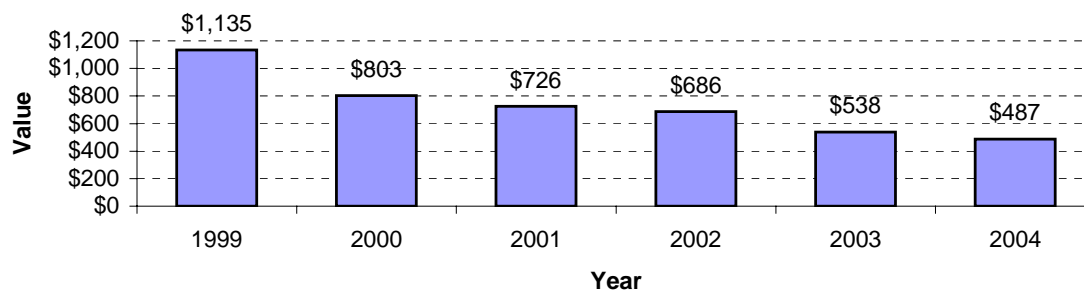
Where data exists, graphs showing the historical trend in weighted average price for 5 years preceding the current vintage are also included. These graphs represent the weighted average price for all wine grapes purchased from the Murray Valley, not only those purchased by Sunraysia wineries.

Graphs have been provided for the 5 red & white varieties that had the highest reported crush in the 2004 vintage.

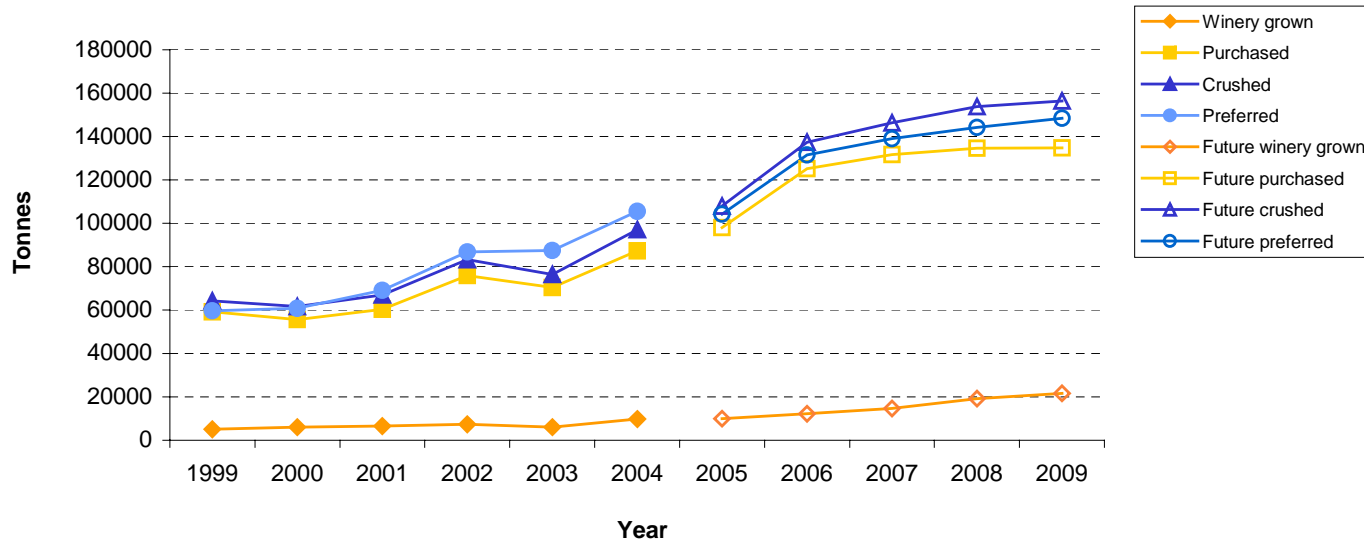
Historical trends in production & forecasts for Cabernet Sauvignon



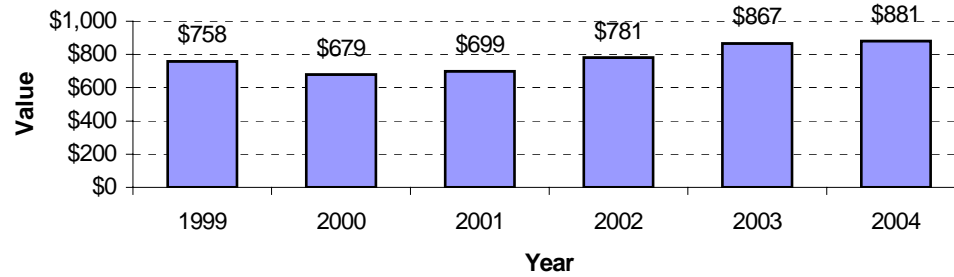
Historical value of Weighted Average Price for Cabernet Sauvignon



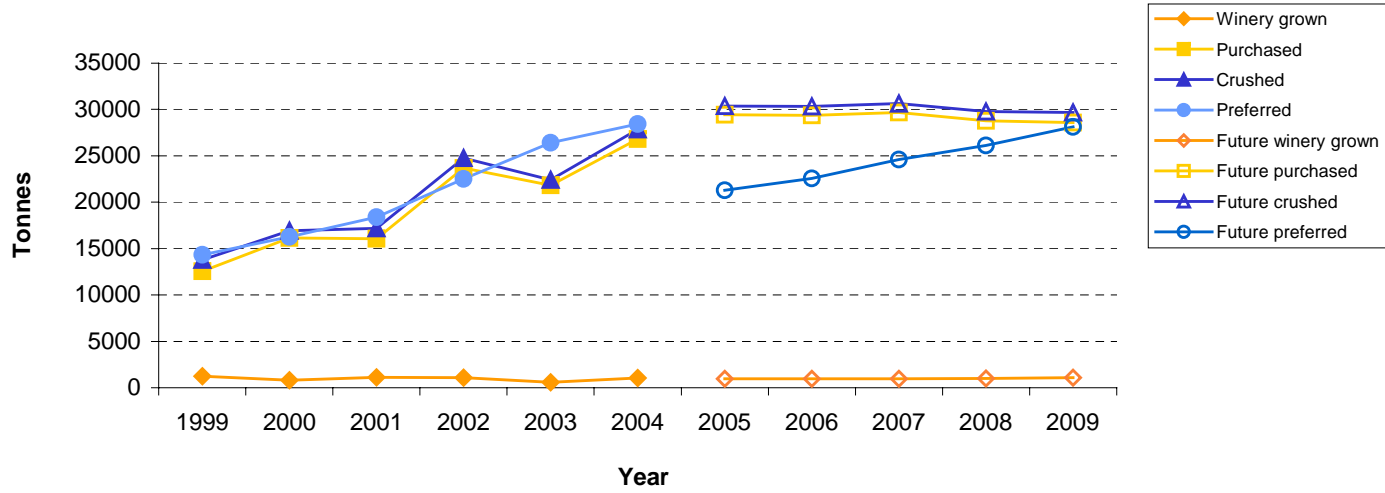
Historical trends in production & forecasts for Chardonnay



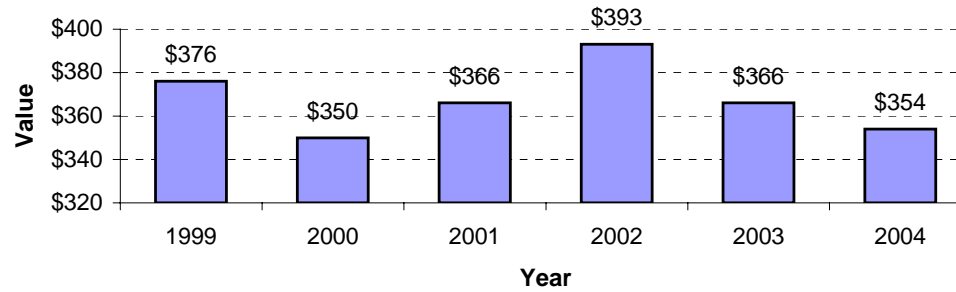
Historical value of Weighted Average Price for Chardonnay



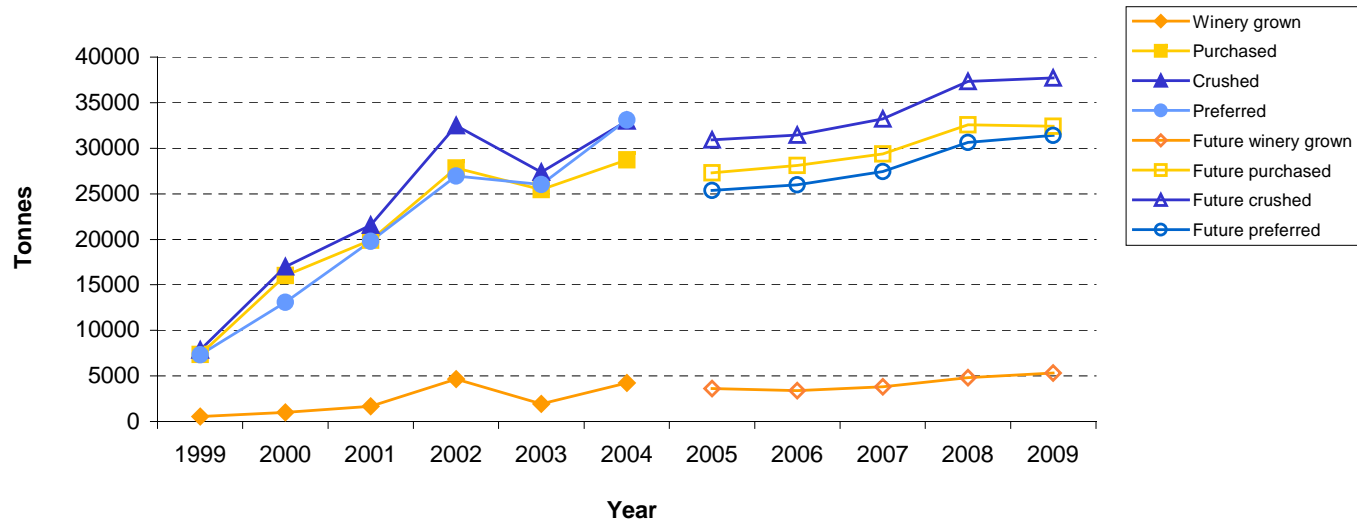
Historical trends in production & forecasts for Colombard



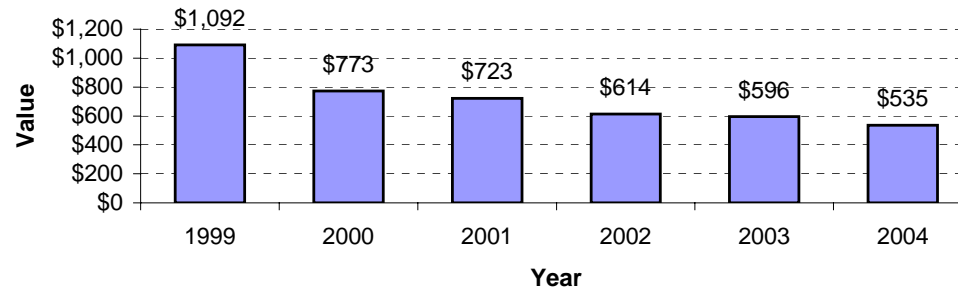
Historical value of Weighted Average Price for Colombard



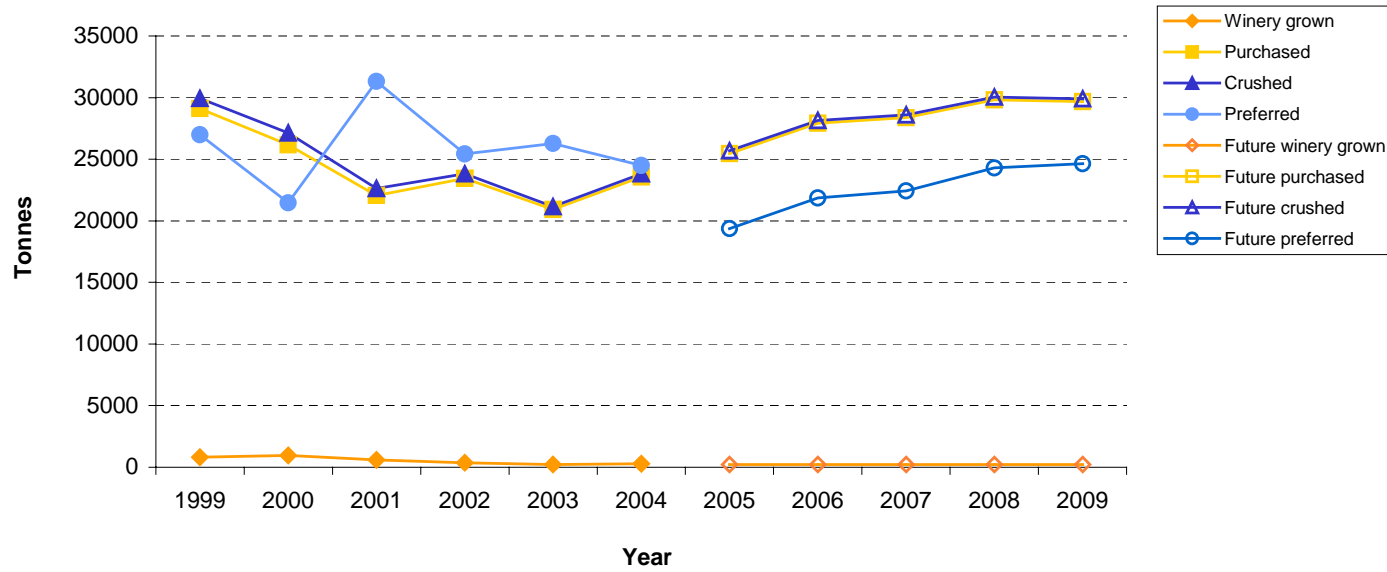
Historical trends in production & forecasts for Merlot



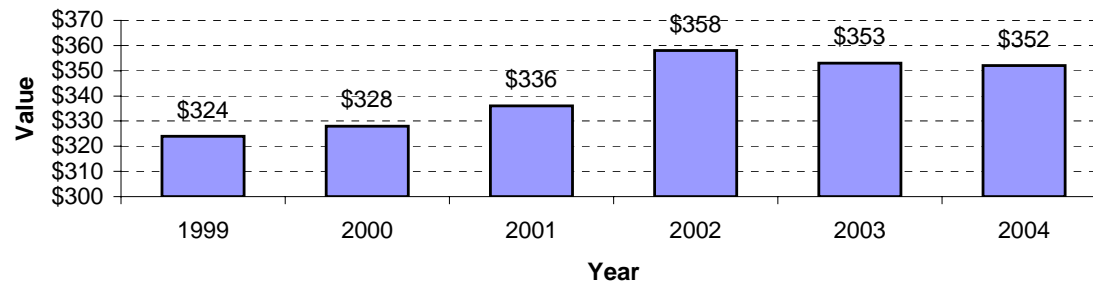
Historical value of Weighted Average Price for Merlot



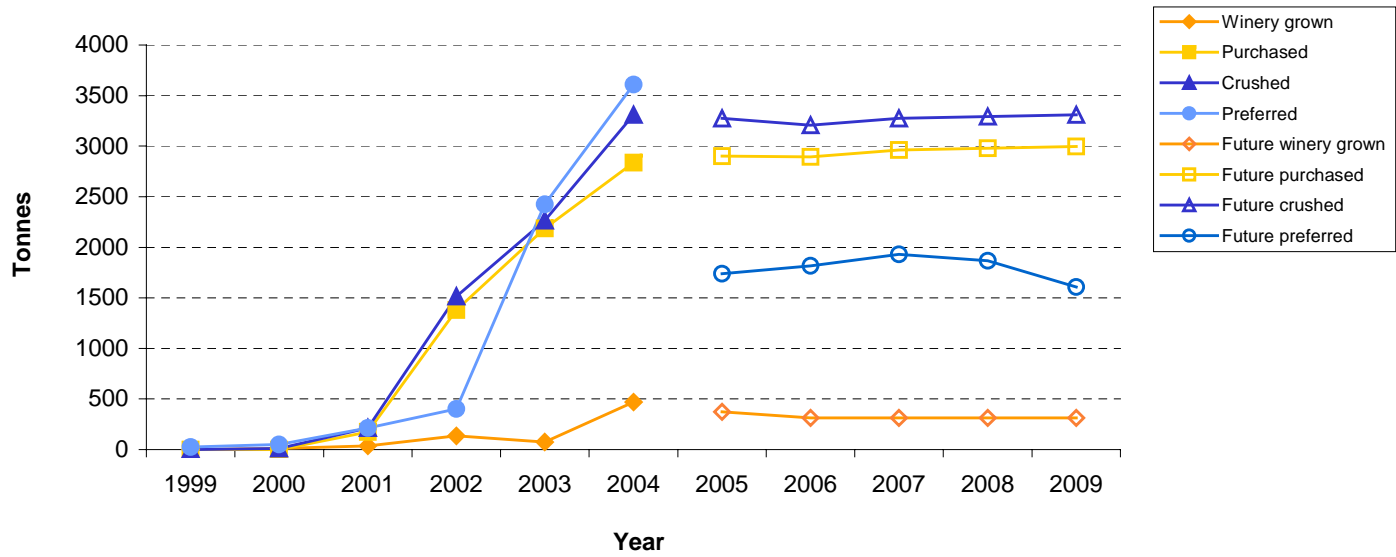
Historical trends in production & forecasts for Muscat Gordo Blanco



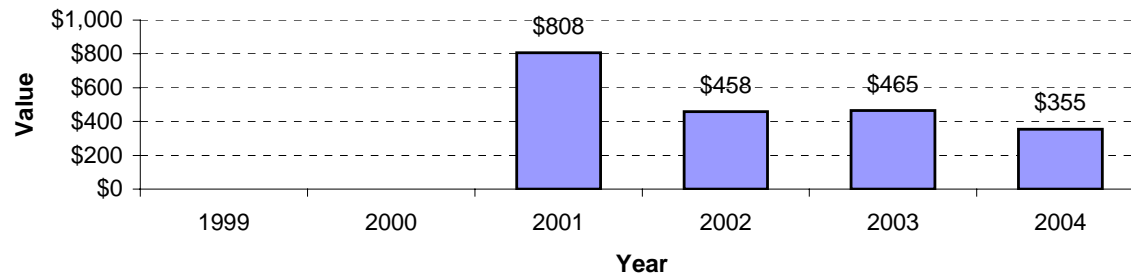
Historical value of Weighted Average Price for Muscat Gordo Blanco



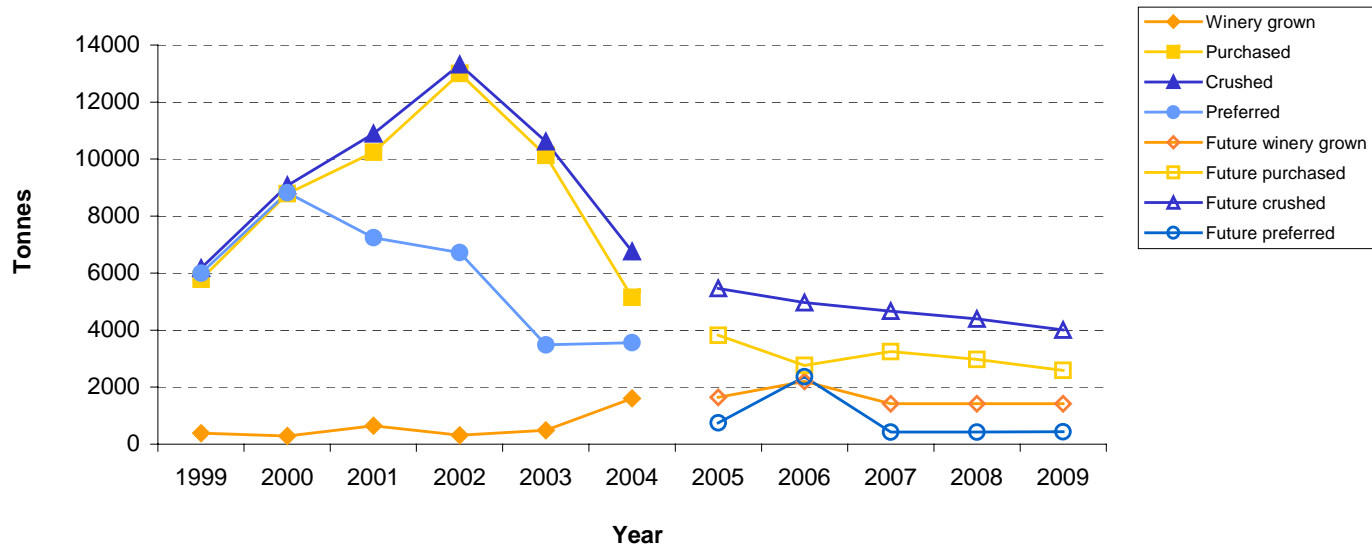
Historical trends in production & forecasts for Petit Verdot



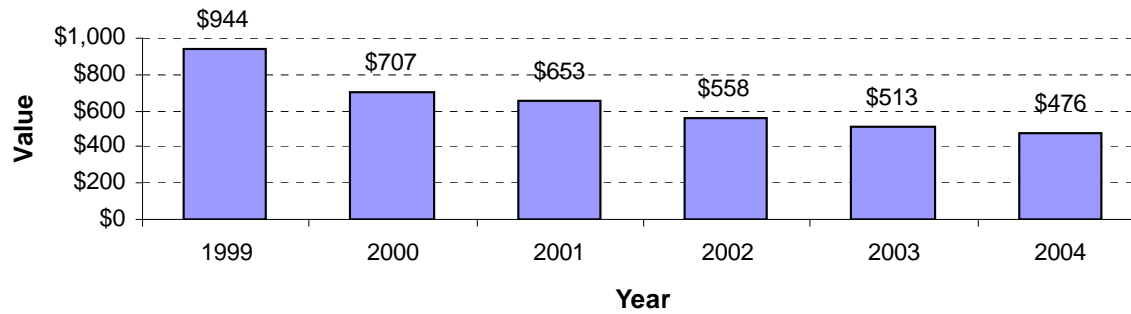
Historical value of Weighted Average Price for Petit Verdot



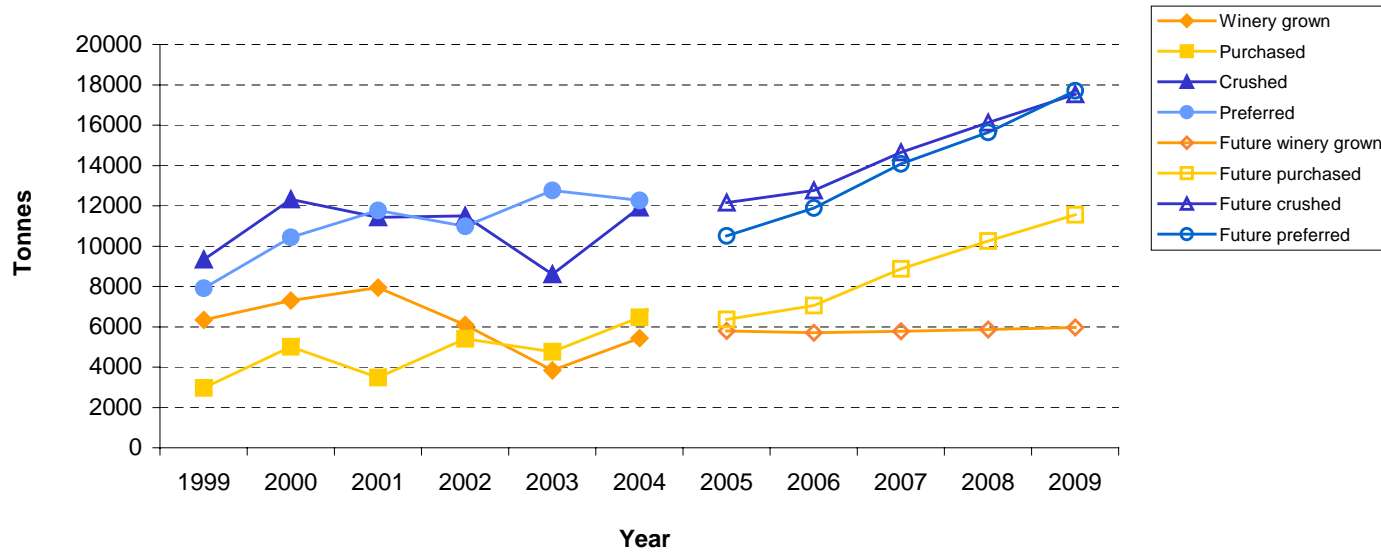
Historical trends in production & forecasts for Ruby Cabernet



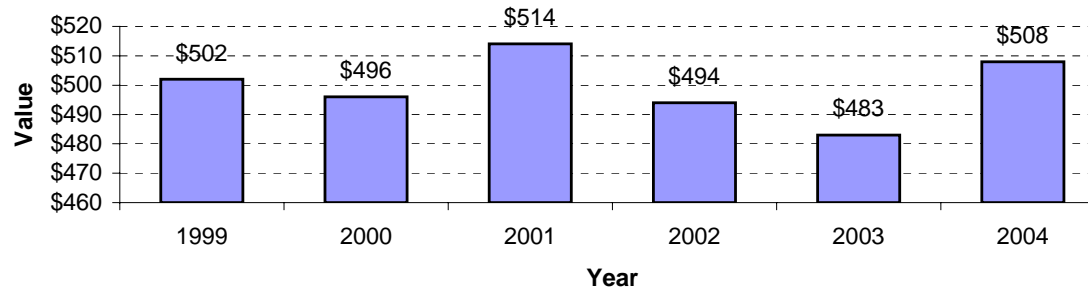
Historical value of Weighted Average Price for Ruby Cabernet



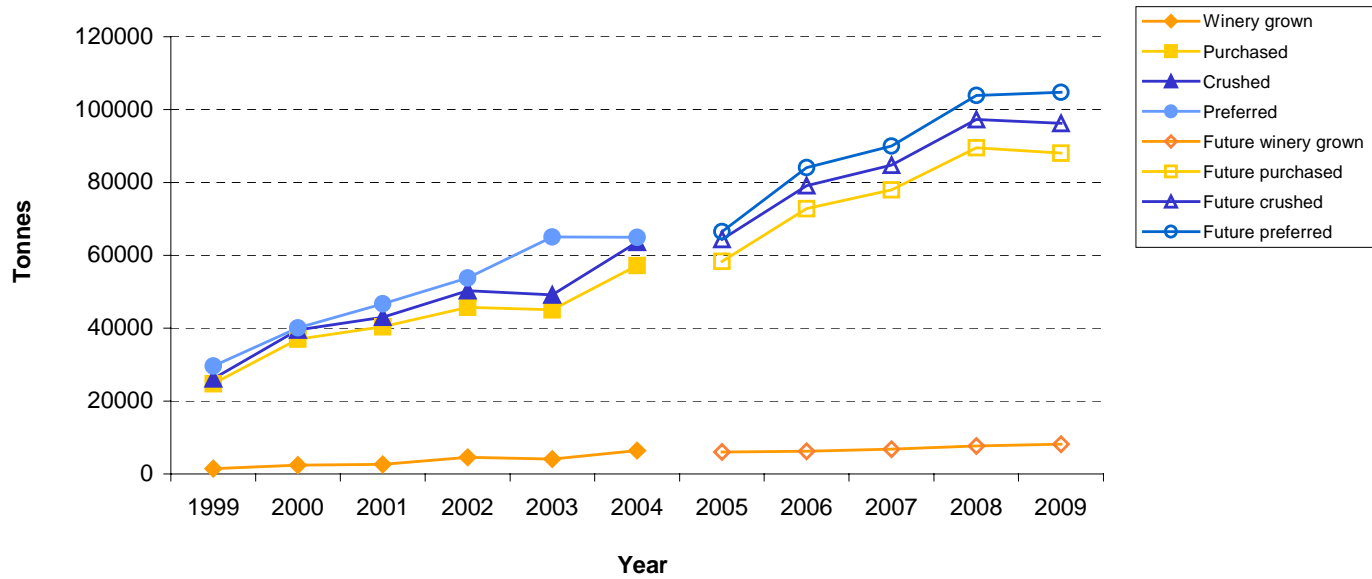
Historical trends in production & forecasts for Semillon



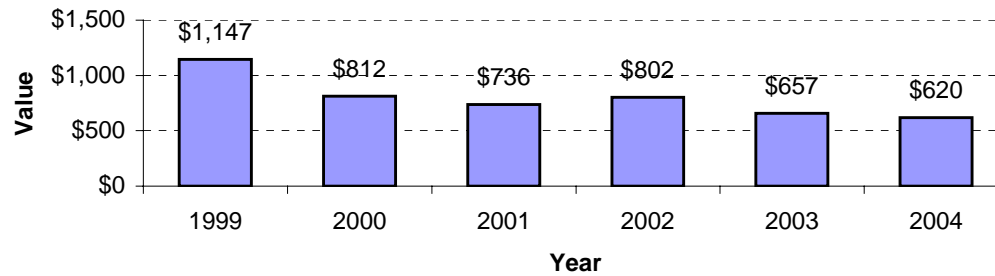
Historical value of Weighted Average Price for Semillon



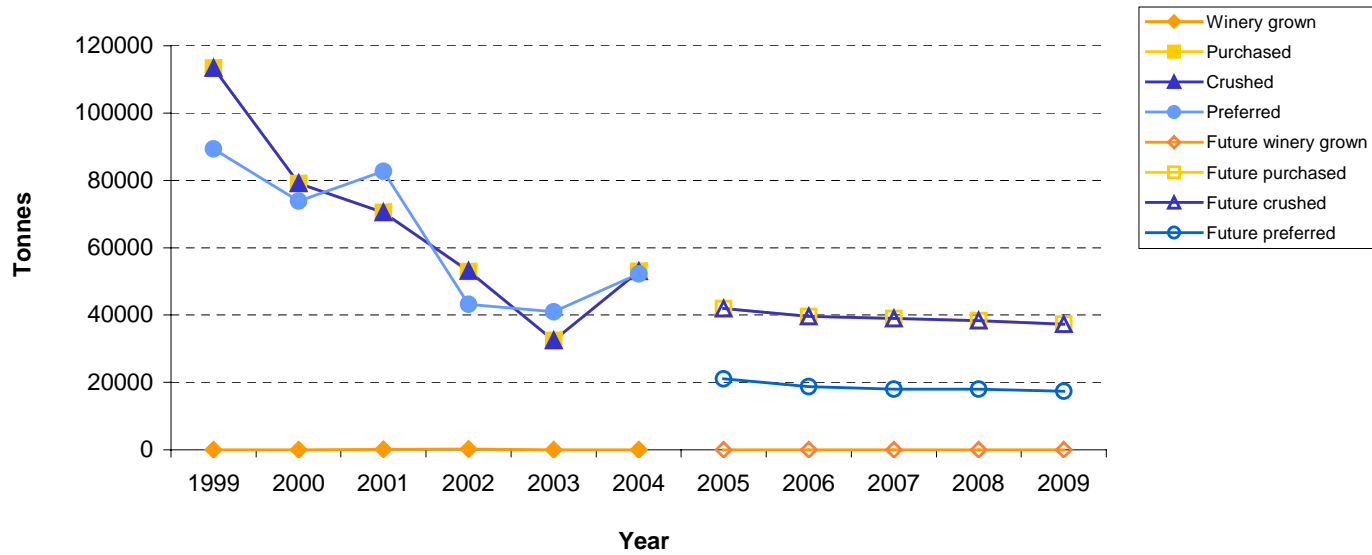
Historical trends in production & forecasts for Shiraz



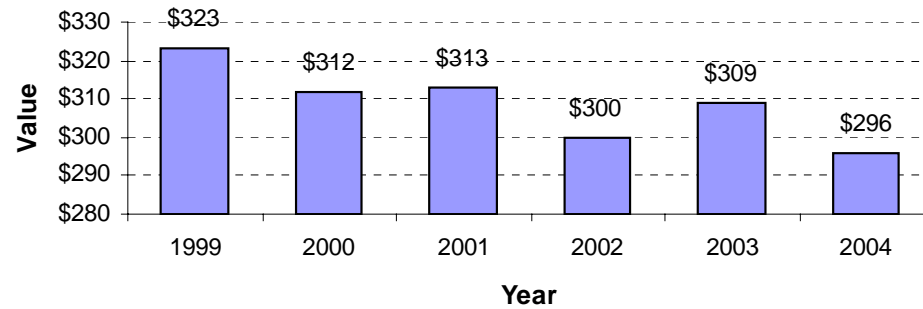
Historical value of Weighted Average Price for Shiraz



Historical trends in production & forecasts for Sultana



Historical value of Weighted Average Price for Sultana





List of Wineries Returning Survey Forms 2004

THANK YOU TO THE FOLLOWING WINERIES WHO RESPONDED TO THE 2004 SURVEY

Andrew Peace Wines

Angoves Pty Ltd

Arrowfield Wines P/L

Bass Valley Estate Winery

Beringer Blass Limited

Bests Great Western

Blue Pyrnees Estate

BRL Hardy Ltd

Brown Brothers Milawa

Capogrecco Winery Estate

Casella Wines Ltd

Cathcart Ridge Estate

Dorrien Estate Winery

Chandon

Deakin Estate

De Bortoli Wines Pty Ltd

Kingston Estate Wines Pty Ltd

McGuigan Simeon Wines Ltd

McPherson Wines

McWilliams Wines Pty Ltd

Mitchelton Winery

Nugan Estate

Orlando-Wyndham

Riverina Wines Pty Ltd

R.L Buller & Son Pty Ltd

Roberts Estate

Salsbury Estate Wines

Salena Estates

Southcorp Wines

Tall Poppy Wines

Tandou Wines

Toorak Wines Pty Ltd

Trentham Estate

Yalumba Wines

Zilzie Wines