

DEPARTMENT OF
PRIMARY INDUSTRIES

Australian Regional Wine Grape Crush Survey

2005

Murray Darling, Swan Hill (Victoria / N.S.W. Murray Valley)

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REPORT PREPARATION

Simone Crothers
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: simone.crothers@dpi.vic.gov.au

Additional copies of this report are available from:
www.dpi.vic.gov.au, (path – Agriculture & Food / Horticulture / Wine & Grapes / Australian Regional Wine Grape Crush Survey)
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COVER DESIGN

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 are requested to 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 Calculated Average Purchase Value is calculated by dividing the total purchase price (post receival 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 receival 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

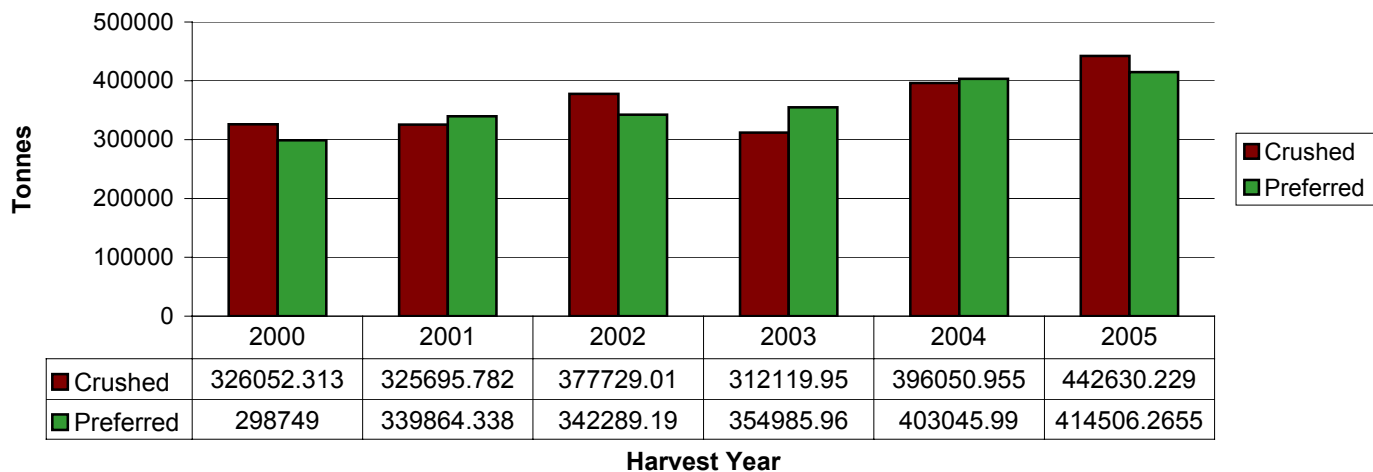


Summary Data and Yearly Trends 2005

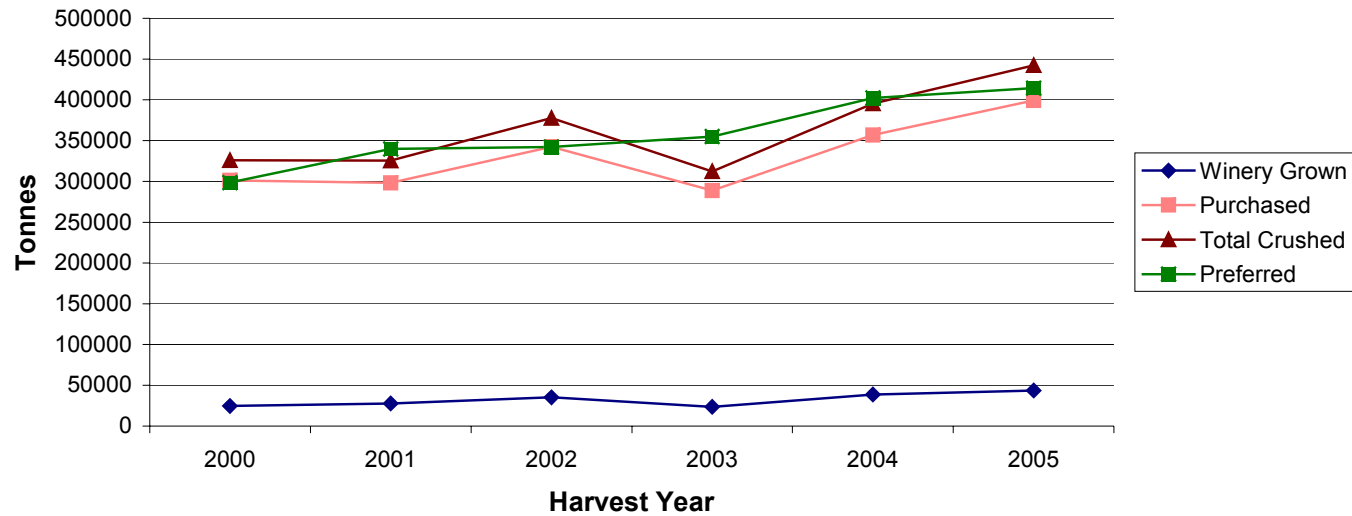
TOTAL TONNES CRUSHED AND TOTAL CROP VALUE

		Total Winery Grown	Total purchased	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Estimated value of purchased grapes	Estimated value of total crush
Red	Sum	22,583	163,195	185,778	172,157	88%	108%	\$71,772,351	\$81,505,023
	Percent	52%	41%	42%	42%				
White	Sum	20,764	236,086	256,851	242,349	92%	106%	\$120,600,218	\$131,894,004
	Percent	48%	59%	58%	58%				
Total		43,347	399,282	442,630	414,506			\$192,372,569	\$213,399,028

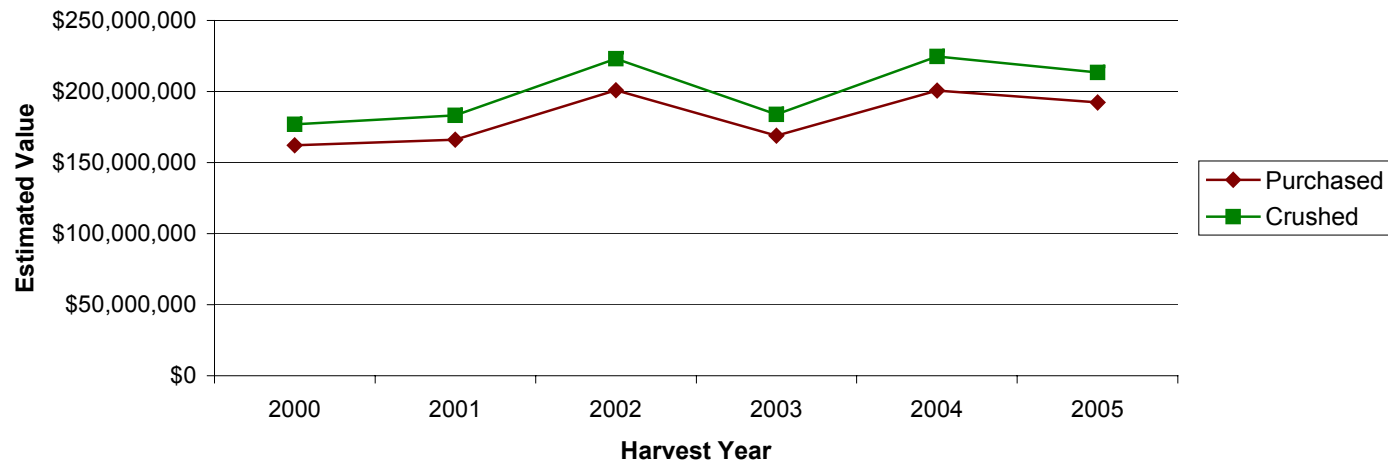
ACTUAL AND PREFERRED TONNAGES SINCE 2000



HISTORICAL TRENDS IN PRODUCTION

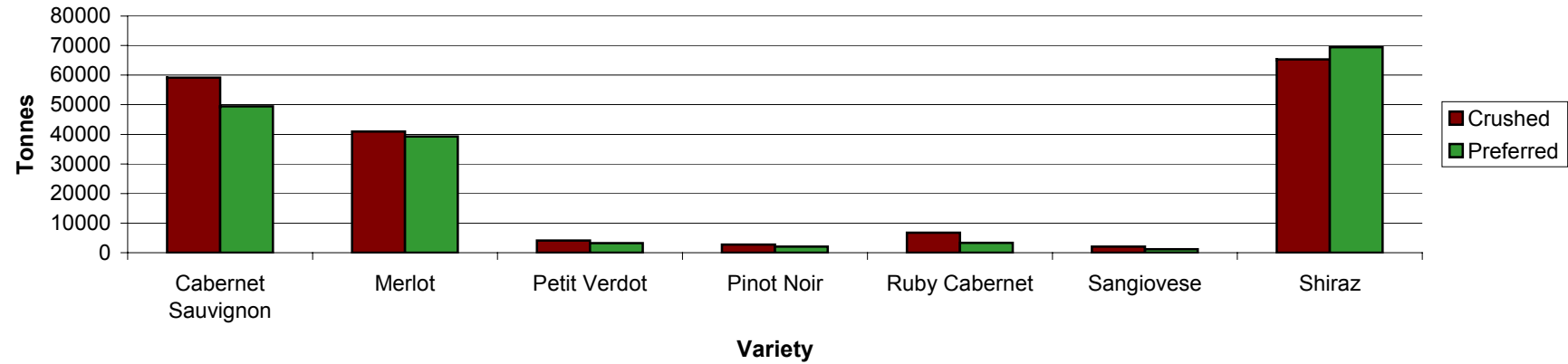


HISTORICAL TRENDS IN ESTIMATED VALUE OF PRODUCTION

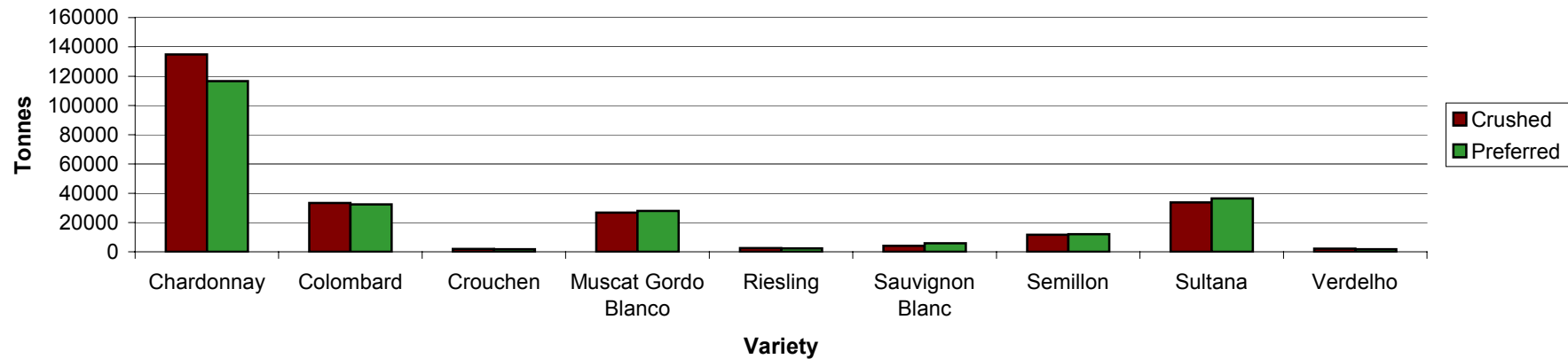


ACTUAL AND PREFERRED TONNAGES BY VARIETY

Red Varieties



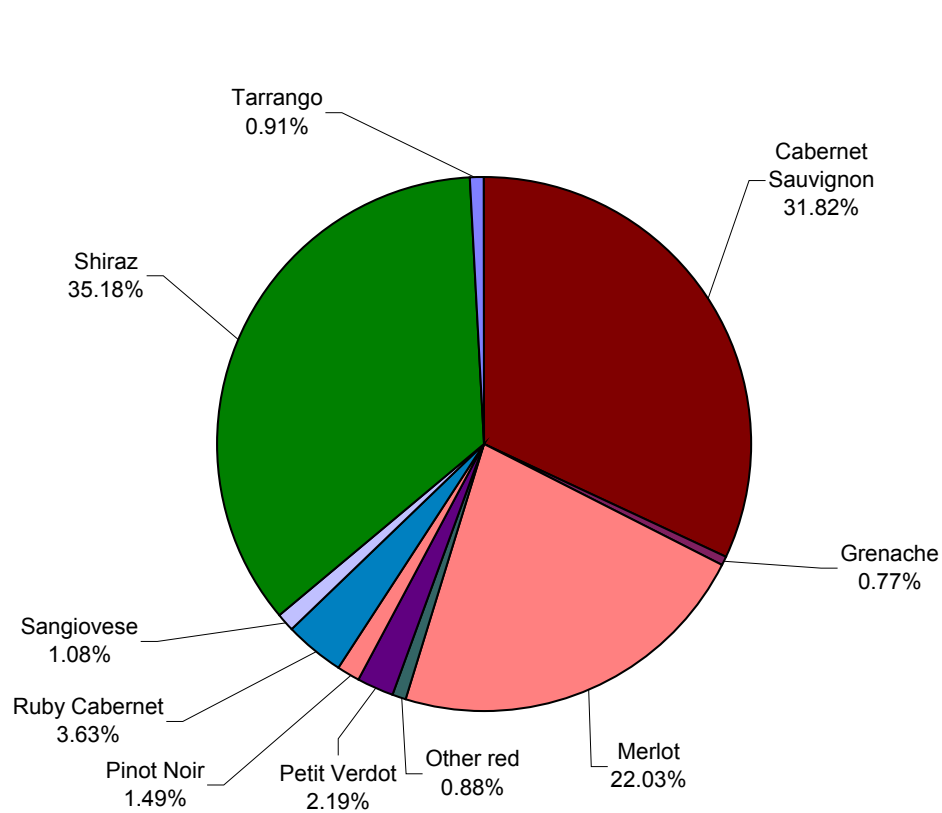
White Varieties



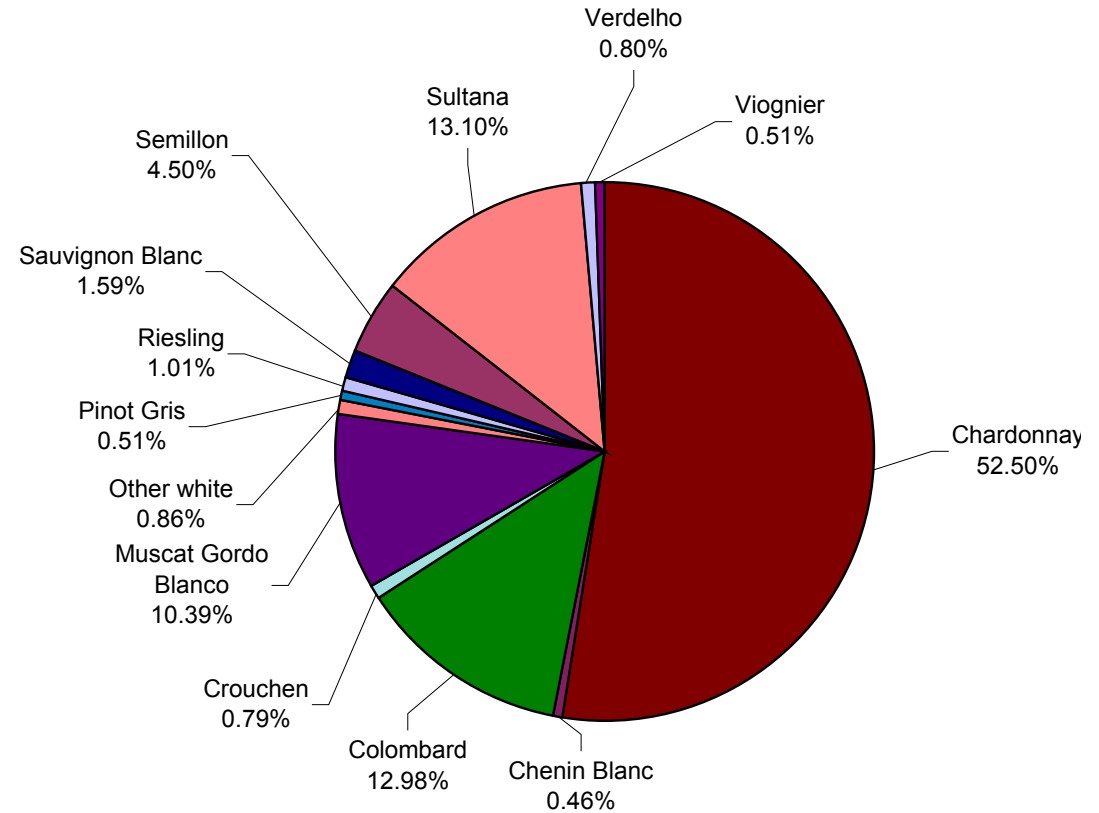
Note: Varieties with both crushed and preferred less than 2000 tonnes are not represented in these graphs.

PERCENTAGE OF TOAL CRUSH BY VARIETY

Red Varieties



White Varieties



Note: Varieties with a total crush less than 500 tonnes are not represented in these graphs.



Price and Tonnage Data 2005

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.

Calculated Average Purchase Value (formerly 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 the Calculated Average Purchase Value.

The Calculated Average Purchase Value in this report is calculated from data that is known to be incomplete. Therefore, it is possible that the Calculated Average Purchase Value 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 Calculated Average Purchase Value multiplied by the total tonnes purchased.

Estimated value of total crush

Calculated as the Calculated Average Purchase Value of purchased fruit 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.

TONNES BY VARIETY FOR WHITE GRAPES

Variety	Total winery grown	Total purchased	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	No. of wineries reporting tonnages (> 0)		
							Own	Other	Preferred
Chardonnay	10347	124490	134836	116615	92%	116%	7	31	32
Chenin Blanc	0	1187	1187	964	100%	123%	0	5	5
Colombard	783	32567	33351	32298	98%	103%	5	20	21
Crouchen	846	1180	2027	1742	58%	116%	4	2	3
Doradillo	0	324	324	0	100%		0	3	0
Muscat Gordo Blanco	303	26387	26691	27926	98%	96%	4	15	16
Other white	808	780	1588	1142	49%	139%	7	8	12
Pinot Gris	179	1135	1314	1360	86%	97%	1	6	6
Riesling	167	2430	2597	2323	93%	112%	3	11	11
Sauvignon Blanc	1108	2974	4082	5759	73%	71%	4	12	14
Semillon	5615	5933	11548	12000	51%	96%	6	13	15
Sultana	0	33638	33638	36321	100%	93%	0	15	14
Traminer	0	284	284	284	100%	100%	0	1	1
Verdelho	430	1634	2064	1729	79%	119%	1	10	10
Viognier	178	1142	1320	1886	87%	70%	3	7	10
Total	20764	236087	256851	242349	92%	106%			
% of Grand Total	48	59	58	58					

TONNES BY VARIETY FOR RED GRAPES

Variety	Total winery grown	Total purchased	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	No. of wineries reporting tonnages (> 0)		
							Own	Other	Preferred
Black Muscat	0	125	125	125	100%	100%	0	1	1
Cabernet Sauvignon	6260	52864	59124	49444	89%	120%	9	25	26
Chambourcin	0	37	37	0	100%		0	1	0
Durif	7	81	88	88	92%	100%	1	2	3
Grenache	77	1359	1436	1100	95%	131%	4	12	10
Malbec	24	66	90	38	73%	236%	1	2	2
Mataro	28	192	220	227	87%	97%	1	5	5
Merlot	4496	36434	40931	39267	89%	104%	8	22	23
Nebbiolo	83	0	83	15		552%	2	0	1
Other red	362	400	762	730	53%	104%	8	9	12
Petit Verdot	420	3653	4073	3187	90%	128%	3	14	12
Pinot Noir	464	2308	2771	2062	83%	134%	2	2	4
Ruby Cabernet	1991	4752	6743	3300	70%	204%	2	12	10
Sangiovese	713	1301	2014	1200	65%	168%	2	10	7
Shiraz	6710	58648	65359	69466	90%	94%	11	27	29
Tarrango	827	872	1699	1698	51%	100%	1	2	2
Tempranillo	122	103	225	210	46%	107%	1	4	5
Total	22583	163195	185779	172157	88%	108%			
% of Grand Total	52	41	42	42					

PRICE SUMMARY DATA FOR WHITE GRAPES

Variety	Total purchased (t)	Total crushed (t)	Estimated total value		Lowest price	Highest price	**Calculated Average Purchase Value per Tonne	
			Purchased grapes	Total grapes				
Chardonnay	124490	134836	\$81,151,316	\$87,895,959	\$80	\$1,039	\$651.87	91%
Chenin Blanc	1187	1187	\$409,893	\$409,893	\$300	\$380	\$345.32	88%
Colombard	32567	33351	\$10,969,757	\$11,233,571	\$90	\$454	\$336.83	93%
Crouchen	1180	2027	\$572,064	\$982,281			\$484.68	99%
Doradillo	324	324	\$77,524	\$77,524	\$200	\$255	\$239.10	100%
Muscat Gordo Blanco	26387	26691	\$9,720,230	\$9,832,022	\$250	\$528	\$368.37	98%
Other white	780	1588	\$365,243	\$743,922	\$230	\$1,300	\$468.45	98%
Pinot Gris	1135	1314	\$797,630	\$923,522	\$500	\$1,100	\$702.68	98%
Riesling	2430	2597	\$1,095,982	\$1,171,179	\$165	\$550	\$450.98	84%
Sauvignon Blanc	2974	4082	\$1,453,206	\$1,994,532	\$400	\$700	\$488.59	92%
Semillon	5933	11548	\$2,433,201	\$4,735,879	\$200	\$728	\$410.09	97%
Sultana	33638	33638	\$9,731,539	\$9,731,539	\$100	\$366	\$289.30	99%
Traminer	284	284	\$149,006	\$149,006			\$524.67	100%
Verdelho	1634	2064	\$736,385	\$930,083	\$90	\$650	\$450.64	95%
Viognier	1142	1320	\$937,241	\$1,083,093	\$600	\$1,038	\$820.73	94%
Total	236087	256851	\$120,600,219	\$131,894,005				

** The Calculated Average Purchase Value (formerly Weighted Average Weighbridge Price) is calculated from data that is known to be incomplete. Therefore, it is possible that the Calculated Average Purchase Price is biased due to the incomplete data.

PRICE SUMMARY DATA FOR RED GRAPES

Variety	Total purchased (t)	Total crushed (t)	Estimated total value		Lowest price	Highest price	**Calculated Average Purchase Value per Tonne	
			Purchased grapes	Total grapes				
Black Muscat	125	125	\$71,359	\$71,359				
Cabernet Sauvignon	52864	59124	\$19,958,229	\$22,321,573	\$90	\$1,000	\$377.54	92%
Chambourcin	37	37	\$10,033	\$10,033			\$270.00	100%
Durif	81	88	\$14,201	\$15,426			\$175.00	38%
Grenache	1359	1436	\$474,423	\$501,253	\$90	\$600	\$348.98	95%
Malbec	66	90	\$37,529	\$51,173				
Mataro	192	220	\$75,090	\$86,055	\$325	\$600	\$391.62	77%
Merlot	36434	40931	\$15,676,538	\$17,611,120	\$90	\$930	\$430.27	93%
Nebbiolo	0	83	\$0	\$47,240				
Other red	400	762	\$228,360	\$434,885	\$250	\$1,000	\$570.87	90%
Petit Verdot	3653	4073	\$1,215,177	\$1,354,921	\$90	\$500	\$332.66	90%
Pinot Noir	2308	2771	\$1,093,985	\$1,313,814			\$474.05	100%
Ruby Cabernet	4752	6743	\$1,289,345	\$1,829,650	\$50	\$930	\$271.35	78%
Sangiovese	1301	2014	\$404,248	\$625,745	\$200	\$600	\$310.65	90%
Shiraz	58648	65359	\$30,719,660	\$34,234,433	\$90	\$909	\$523.79	83%
Tarrango	872	1699	\$444,465	\$866,108			\$509.88	100%
Tempranillo	103	225	\$59,708	\$130,236	\$400	\$800	\$578.57	76%
Total	163195	185779	\$71,772,351	\$81,505,024				

** The Calculated Average Purchase Value (formerly Weighted Average Weighbridge Price) is calculated from data that is known to be incomplete. Therefore, it is possible that the Calculated Average Purchase Price is biased due to the incomplete data.

PRICE SUMMARY DATA FOR WHITE GRAPES FROM SUNRAYSIA WINERIES

Variety	Total purchased (t)	Total crushed (t)	Estimated total value		Lowest price	Highest price	**Calculated Average Purchase Value per Tonne	
			Purchased grapes	Total grapes				
Chardonnay	86811	97138	\$57,203,742	\$64,008,524	\$180	\$1,039	\$658.95	92%
Chenin Blanc	466	466	\$139,849	\$139,849			\$299.93	69.%
Colombard	27838	28578	\$9,460,926	\$9,712,491	\$150	\$454	\$339.86	92%
Crouchen	6	92	\$1,702	\$24,817				
Doradillo	324	324	\$77,524	\$77,524	\$200	\$255	\$239.10	100%
Muscat Gordo Blanco	20734	21003	\$7,728,708	\$7,829,123	\$250	\$528	\$372.76	98%
Other white	583	745	\$157,549	\$201,233	\$230	\$536	\$270.19	97%
Pinot Gris	403	582	\$282,423	\$408,072	\$500	\$835	\$701.32	95%
Riesling	1135	1283	\$474,590	\$536,526	\$350	\$519	\$418.09	83%
Sauvignon Blanc	2424	3532	\$1,172,563	\$1,708,319	\$400	\$700	\$483.69	91%
Semillon	4591	10206	\$1,847,002	\$4,106,079	\$200	\$728	\$402.32	97%
Sultana	29647	29647	\$8,579,333	\$8,579,333	\$100	\$366	\$289.38	99%
Traminer	284	284	\$149,006	\$149,006			\$524.67	100%
Verdelho	790	1220	\$430,115	\$664,130	\$300	\$650	\$544.44	89%
Viognier	465	642	\$352,557	\$487,410	\$700	\$800	\$758.84	84.%
Total	176501	195742	\$88,057,589	\$98,632,435				

** The Calculated Average Purchase Value (formerly Weighted Average Weighbridge Price) is calculated from data that is known to be incomplete. Therefore, it is possible that the Calculated Average Purchase 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		Lowest price	Highest price	**Calculated Average Purchase Value per Tonne	
			Purchased grapes	Total grapes				
Black Muscat	125	125	\$65,712	\$65,712				
Cabernet Sauvignon	36112	42347	\$14,127,474	\$16,566,709	\$100	\$1,000	\$391.21	94%
Durif	50	50	\$26,364	\$26,364				
Grenache	703	773	\$286,325	\$314,692	\$225	\$600	\$407.10	90%
Malbec	66	90	\$34,559	\$47,124				
Mataro	118	146	\$47,267	\$58,504			\$401.32	62%
Merlot	21370	25865	\$9,690,942	\$11,729,281	\$200	\$930	\$453.48	92%
Nebbiolo	0	83	\$0	\$43,502				
Other red	139	190	\$72,862	\$100,083			\$525.70	73%
Petit Verdot	1640	2060	\$536,501	\$673,901	\$200	\$450	\$327.08	85%
Pinot Noir	2308	2771	\$1,093,985	\$1,313,814			\$474.05	100%
Ruby Cabernet	3367	5358	\$1,005,533	\$1,600,185	\$250	\$930	\$298.64	77%
Sangiovese	462	1175	\$196,647	\$499,950	\$250	\$600	\$425.38	73%
Shiraz	43857	50500	\$23,195,512	\$26,708,448	\$150	\$909	\$528.88	91%
Tempranillo	75	197	\$34,320	\$89,952			\$456.38	67.0%
Total	110392	131730	\$50,414,002	\$59,838,221				

** The Calculated Average Purchase Value (formerly Weighted Average Weighbridge Price) is calculated from data that is known to be incomplete. Therefore, it is possible that the Calculated Average Purchase Price is biased due to the incomplete data.



Estimates of Expected and Preferred Intakes 2005

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.

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.

Reliability of Forecasts

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

The percentage after each estimate is a measure of reliability. This is based on the number of wineries providing a forecast for the reported year.

A reliability of 100% means that all wineries who grew or purchased the variety in the current vintage provided estimates of the tonnages they require in future vintages. A reliability of 50% means that forecasts were provided by some wineries. These wineries accounted for 50% of the tonnes for each variety grown or purchased in the current vintage.

ESTIMATED FUTURE WINERY PRODUCTION AND PURCHASES OF WHITE GRAPES

Variety	2006		2007		2008		2009		2010	
	Winery grown	Purchased	Winery grown	Purchased	Winery grown	Purchased	Winery grown	Purchased	Winery grown	Purchased
Chardonnay	12663	140396	19175	136616	21890	137222	22000	132521	22105	133656
Chenin Blanc	0	3032	0	3532	0	3141	0	3141	0	3141
Colombard	1110	33992	1065	32844	1763	28716	3835	26964	5585	27253
Crouchen	1095	1068	1085	1131	1085	1127	1085	1127	1085	1017
Doradillo	0	294	0	294	0	294	0	294	0	294
Muscat Gordo Blanco	226	29398	201	29355	901	31095	3001	31255	4401	31255
Other white	722	1439	722	1465	730	1446	737	1448	737	1451
Pinot Gris	450	2929	790	3282	1000	6542	1200	9596	1400	13649
Riesling	380	1925	500	2091	650	2029	650	2090	650	2114
Sauvignon Blanc	2904	3712	5189	4736	5529	5227	5939	4507	6539	4736
Semillon	5662	5568	5572	6753	5572	6938	5612	7106	5632	7128
Sultana	0	30798	0	30072	0	29964	0	29964	0	29964
Traminer	0	816	0	849	0	884	0	884	0	884
Verdelho	375	2087	375	2104	500	2018	1100	2037	2000	2057
Viognier	176	1389	186	1622	190	1796	190	1832	190	1870
Total	25763	258844	34860	256746	39810	258439	45349	254766	50324	260469

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

ESTIMATED FUTURE WINERY PRODUCTION AND PURCHASES OF RED GRAPES

Variety	2006		2007		2008		2009		2010	
	Winery grown	Purchased	Winery grown	Purchased	Winery grown	Purchased	Winery grown	Purchased	Winery grown	Purchased
Cabernet Sauvignon	6021	50209	6201	53331	6201	52130	6206	50467	6211	50997
Durif	7	0	7	0	7	0	7	0	7	0
Grenache	103	2131	3	2049	3	2102	3	2102	3	2102
Malbec	50	0	0	0	0	0	0	0	0	0
Mataro	50	579	0	582	0	559	0	559	0	559
Merlot	5046	37843	6136	36564	6146	37338	6151	35267	6151	35510
Nebbiolo	75	0	75	0	75	0	75	0	75	0
Other red	701	372	1056	372	1411	372	1556	372	1476	372
Petit Verdot	400	3159	400	2880	400	2208	400	2255	400	2235
Pinot Noir	435	2210	440	1660	445	1660	445	1310	445	1310
Ruby Cabernet	1440	4159	1440	3819	1440	3268	1440	2872	1440	2986
Sangiovese	550	989	450	975	450	1021	450	1071	450	1124
Shiraz	6617	77113	7427	78948	7794	86166	7912	83449	7987	82385
Tarrango	830	1220	1091	1370	1300	1390	1550	1410	1550	1410
Tempranillo	120	75	120	75	120	55	120	55	120	55
Total	22445	180059	24846	182624	25792	188270	26315	181189	26315	181,045

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

ESTIMATED AND PREFERRED FUTURE INTAKE OF WHITE GRAPES

Variety	2006			2007			2008			2009			2010		
	Estimated	Preferred		Estimated	Preferred		Estimated	Preferred		Estimated	Preferred		Estimated	Preferred	
Chardonnay	153059	134868	94%	155791	141261	94%	159112	155492	94%	154521	162970	93%	155761	169768	93%
Chenin Blanc	3032	3082	77%	3532	3543	77%	3141	3248	58%	3141	3333	58%	3141	3424	58%
Colombard	35102	33385	98%	33909	34622	98%	30479	37755	98%	30799	37829	97%	32838	38420	97%
Crouchen	2163	2008	98%	2216	1916	98%	2212	1912	98%	2212	1912	98%	2102	1802	98%
Doradillo	294	0	75%	294	0	75%	294	0	75%	294	0	75%	294	0	75%
Muscat Gordo Blanco	29624	29392	98%	29556	29362	96%	31996	31865	96%	34256	32111	96%	35656	32481	96%
Other white	2161	4244	62%	2187	4516	62%	2176	4815	62%	2185	4987	62%	2188	5019	62%
Pinot Gris	3379	3379	99%	4072	4082	99%	7542	7542	99%	10796	10596	99%	15049	14649	99%
Riesling	2305	2080	81%	2591	2243	76%	2679	2367	76%	2740	2410	76%	2764	2420	76%
Sauvignon Blanc	6616	9174	99%	9925	11128	99%	10756	13165	99%	10446	11726	99%	11275	11967	99%
Semillon	11230	13163	99%	12325	14764	97%	12510	15446	96%	12718	17556	96%	12760	17598	96%
Sultana	30798	32520	98%	30072	31706	98%	29964	31640	98%	29964	30983	98%	29964	30983	98%
Traminer	816	816	100%	849	849	100%	884	884	100%	884	884	100%	884	884	100%
Verdelho	2462	2090	99%	2479	2183	99%	2518	2309	99%	3137	2535	99%	4057	3264	99%
Viognier	1565	2203	97%	1808	2608	97%	1986	2864	97%	2022	3382	97%	2060	3422	97%
Total	284607	272404		291606	284783		298249	311304		300116	323214		310794	336103	

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

ESTIMATED AND PREFERRED FUTURE INTAKE OF RED GRAPES

Variety	2006			2007			2008			2009			2010		
	Estimated	Preferred		Estimated	Preferred		Estimated	Preferred		Estimated	Preferred		Estimated	Preferred	
Cabernet Sauvignon	56230	51285	95%	59532	58525	93%	58331	62700	93%	56673	67123	93%	57208	68375	93%
Durif	7	7	8%	7	7	8%	7	7	8%	7	7	8%	7	7	8%
Grenache	2234	2175	69%	2052	2016	56%	2105	2105	56%	2105	2105	56%	2105	2105	56%
Malbec	50	50	27%	0	0	0%	0	0	0%	0	0	0%	0	0	0%
Mataro	629	629	58%	582	582	22%	559	559	10%	559	559	10%	559	559	10%
Merlot	42889	40541	97%	42700	41836	95%	43485	46953	95%	41419	45763	95%	41662	46095	95%
Nebbiolo	75	15	100%	75	15	100%	75	15	100%	75	15	100%	75	15	100%
Other red	1073	1061	90%	1428	1530	89%	1783	2004	89%	1928	2251	89%	1848	2289	89%
Petit Verdot	3559	2975	94%	3280	3027	94%	2608	3007	92%	2655	3055	92%	2635	3108	92%
Pinot Noir	2645	5024	100%	2100	5019	100%	2105	5737	100%	1755	5601	100%	1755	5471	100%
Ruby Cabernet	5599	3618	86%	5259	3671	86%	4708	4194	84%	4312	3913	82%	4426	4043	82%
Sangiovese	1539	1163	91%	1425	1051	82%	1471	1102	82%	1521	1156	82%	1574	1212	82%
Shiraz	83730	89300	94%	86375	92227	91%	93960	109623	91%	91361	110907	90%	90372	112156	90%
Tarrango	2050	1931	97%	2461	2093	97%	2690	2313	97%	2960	2551	97%	2960	2813	97%
Tempranillo	195	55	87%	195	55	87%	175	55	87%	175	55	87%	175	55	87%
Red Total	202504	199829		207471	211654		214062	240372		207504	245061		207361	248305	

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



Trend Graphs for Selected Varieties 2005

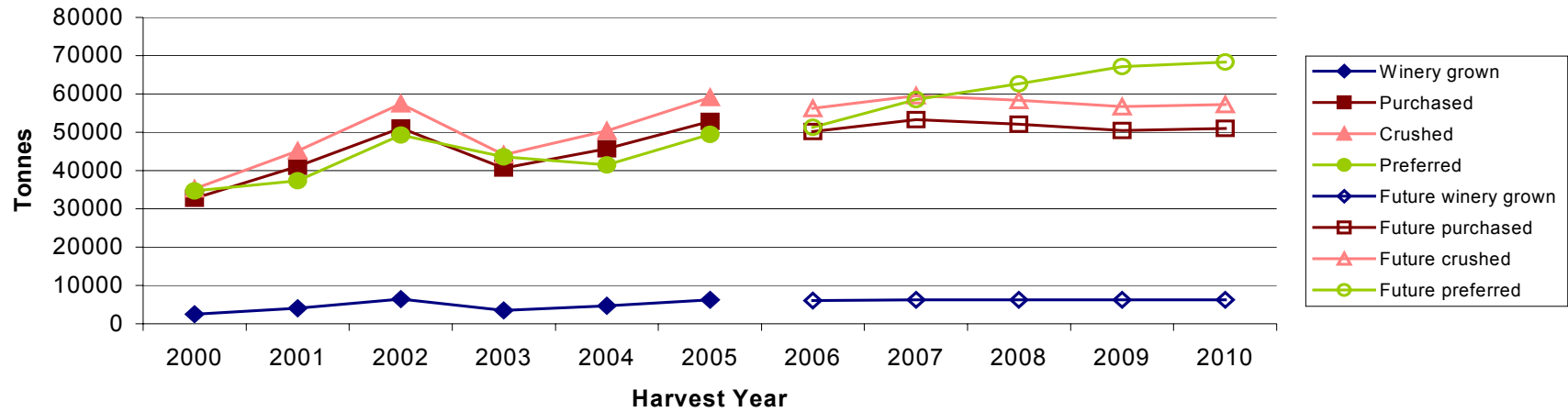
NOTES ON TREND GRAPHS PROVIDED IN SECTION 4

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.

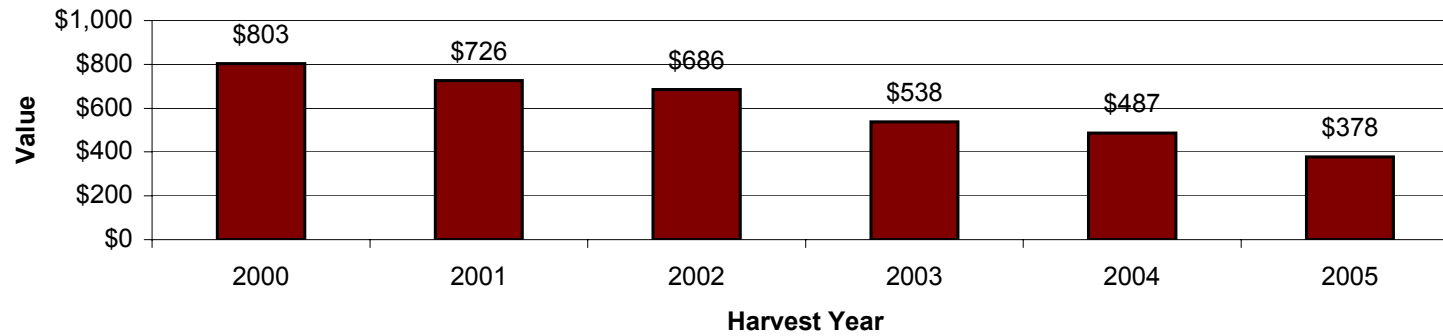
Where data exists, graphs showing the historical trend in weighted average price for 5 years preceding the current vintage are also included. These graphs represent the Calculated Average Purchase Value per Tonne (formerly Weighted Average Weighbridge Price) for all wine grapes purchased from the Murray Darling & Swan Hill regions, 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 2005 vintage.

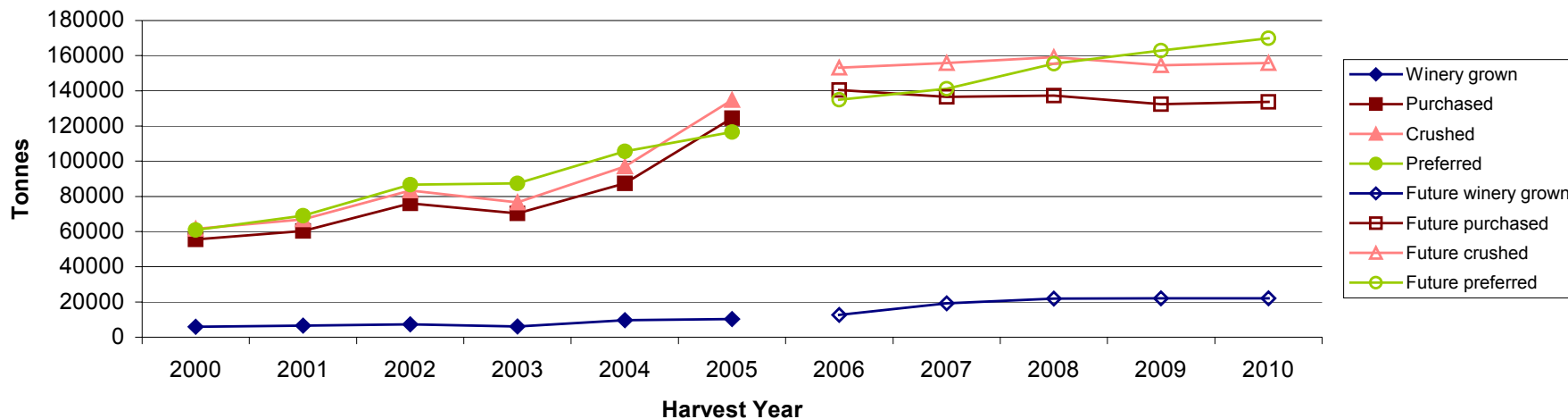
Historical trends in production & forecasts for Cabernet Sauvignon



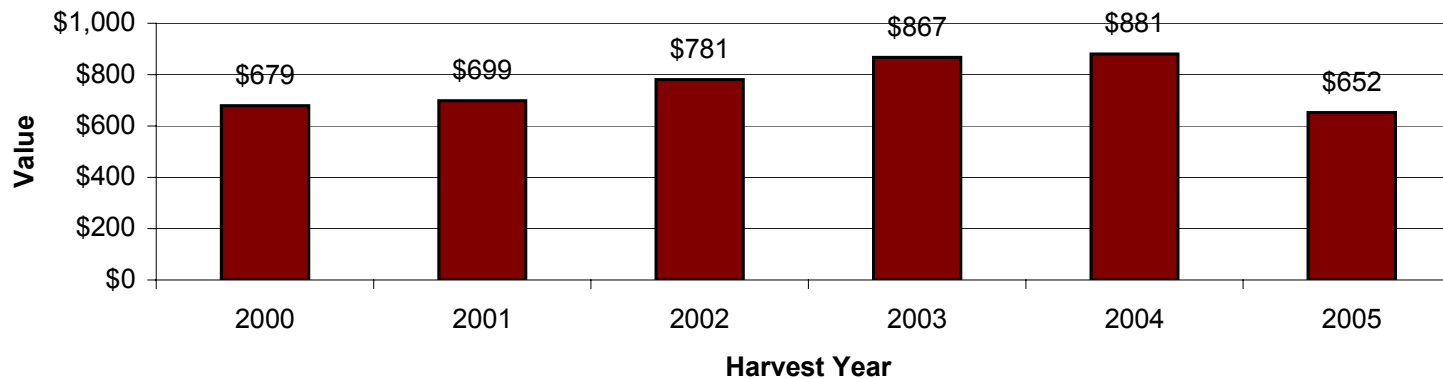
Historical value of Calculated Average Purchase Value per tonne for Cabernet Sauvignon



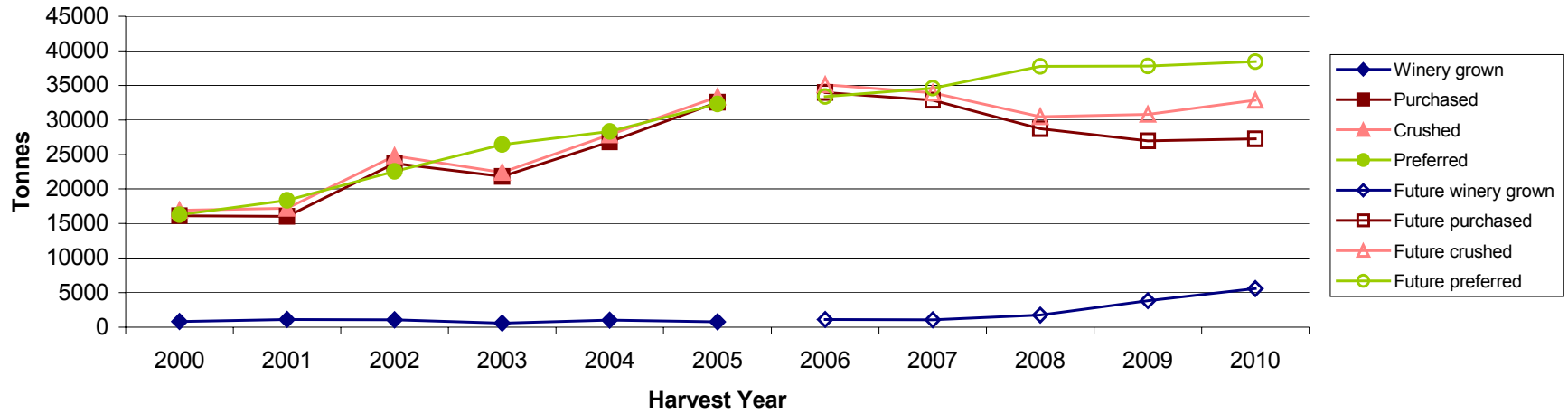
Historical trends in production & forecasts for Chardonnay



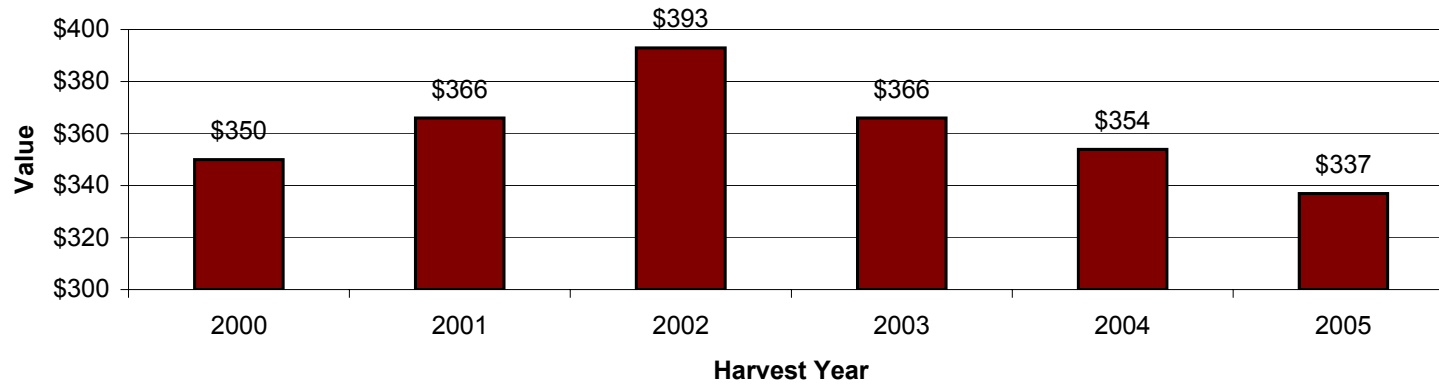
Historical value of Calculated Average Purchase Value per tonne for Chardonnay



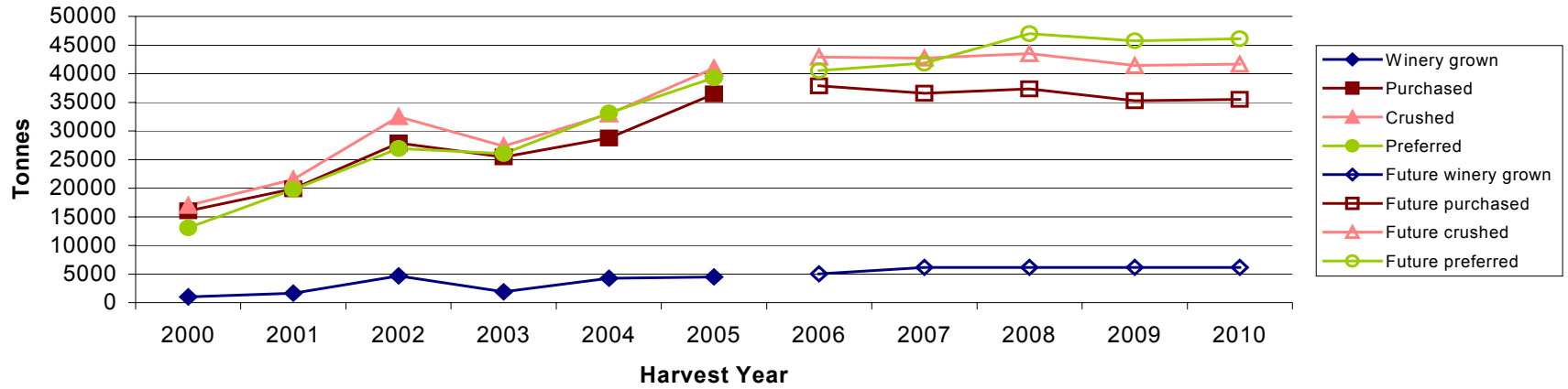
Historical trends in production & forecasts for Colombard



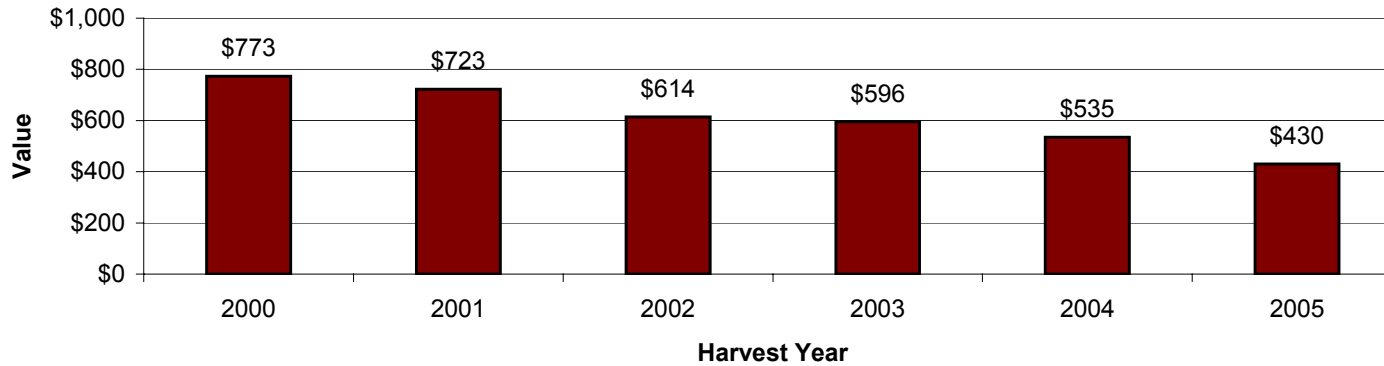
Historical value of Calculated Average Purchase Value per tonne for Colombard



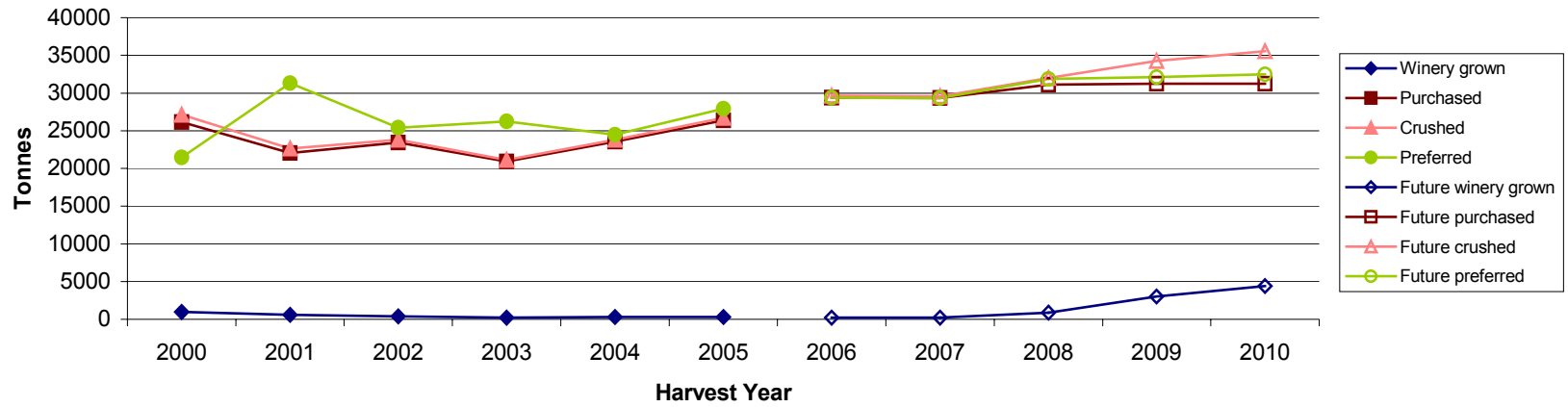
Historical trends in production & forecasts for Merlot



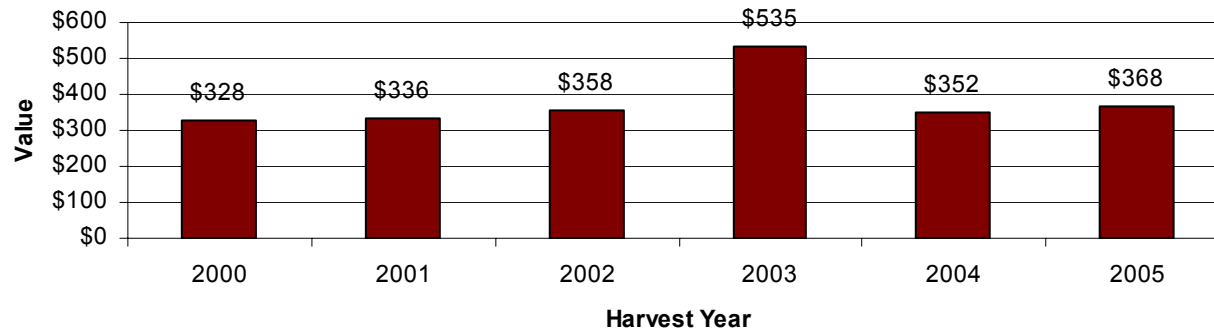
Historical value of Calculated Average Purchase Value per tonne for Merlot



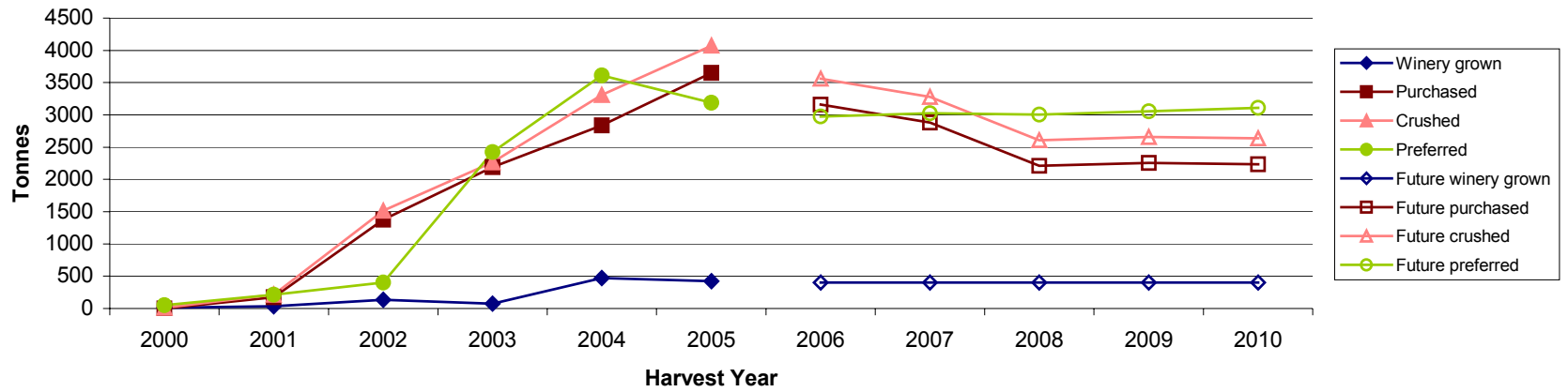
Historical trends in production & forecasts for Muscat Gordo Blanco



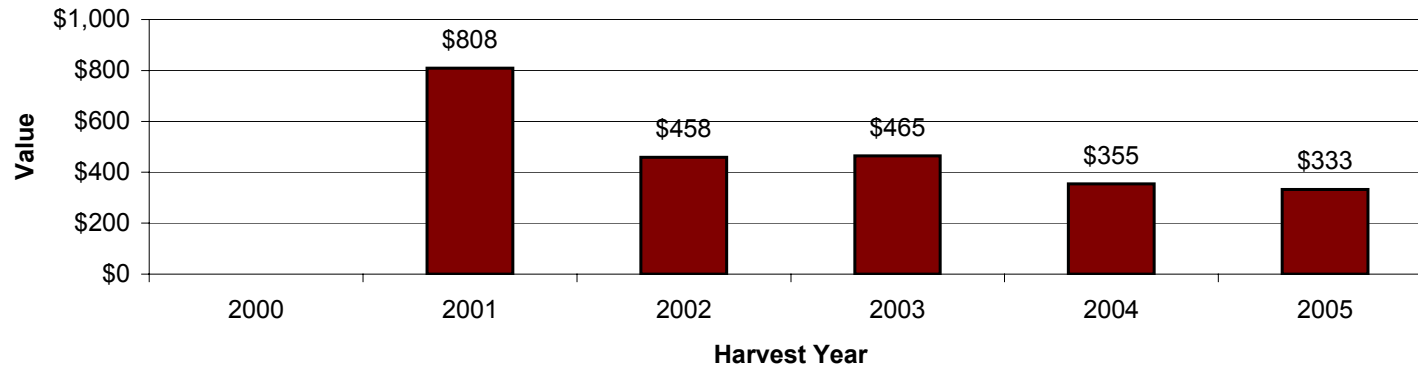
Historical value of Calculated Average Purchase Value per tonne for Muscat Gordo Blanco



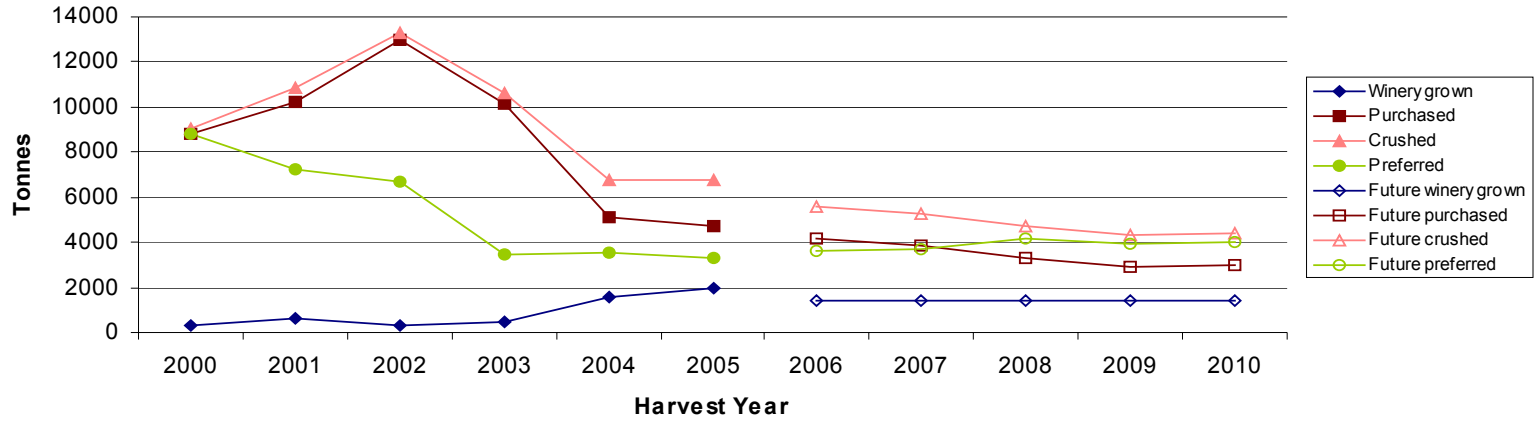
Historical trends in production & forecasts for Petit Verdot



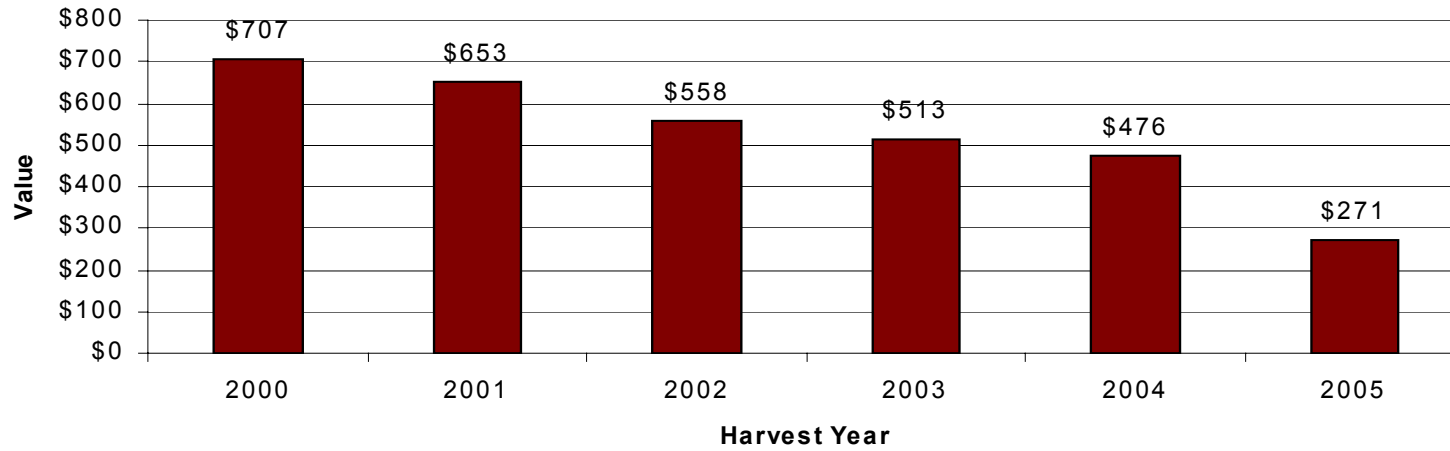
Historical value of Calculated Average Purchase Value per tonne for Petit Verdot



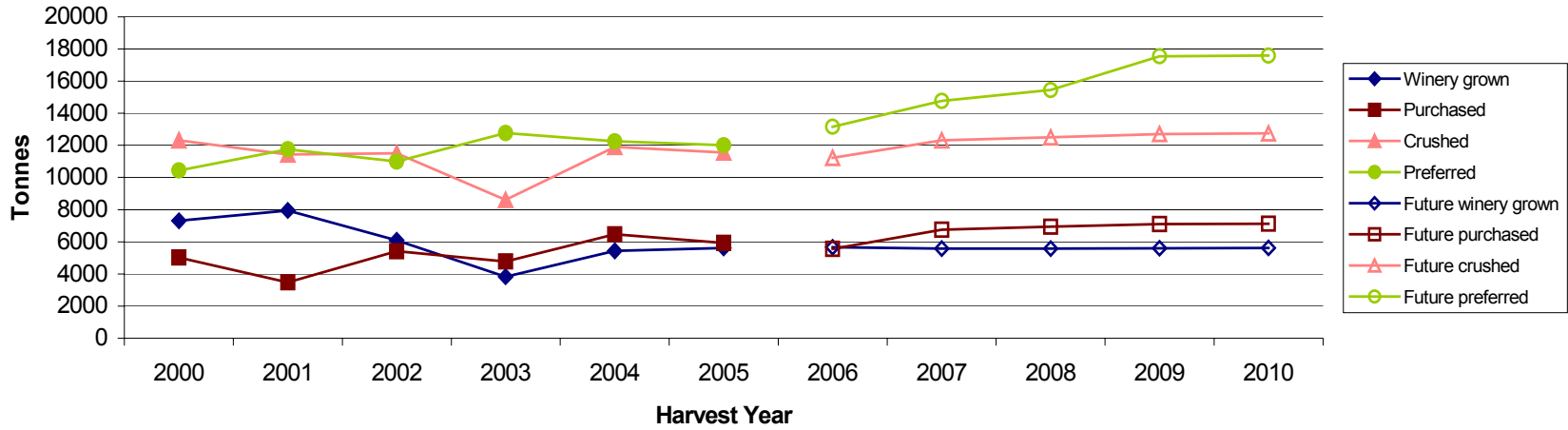
Historical trends in production & forecasts for Ruby Cabernet



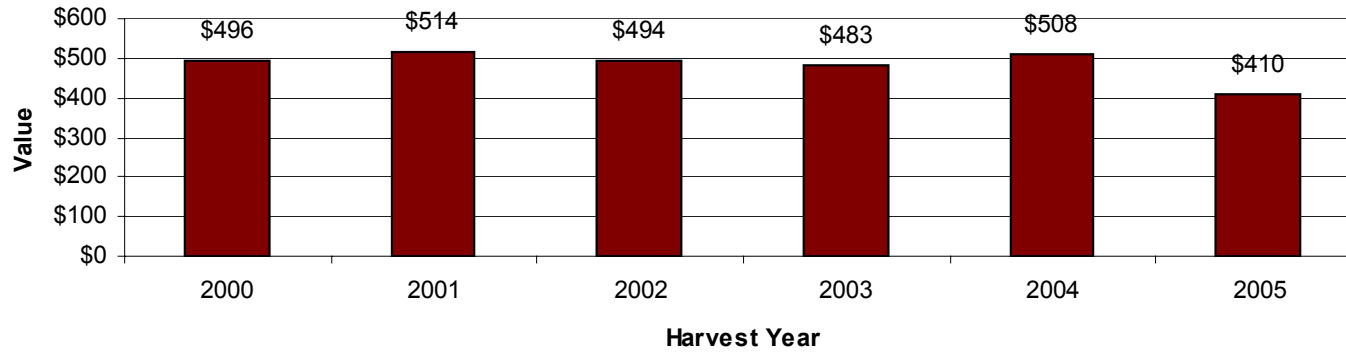
Historical value of Calculated Average Purchase Value per tonne for Ruby Cabernet



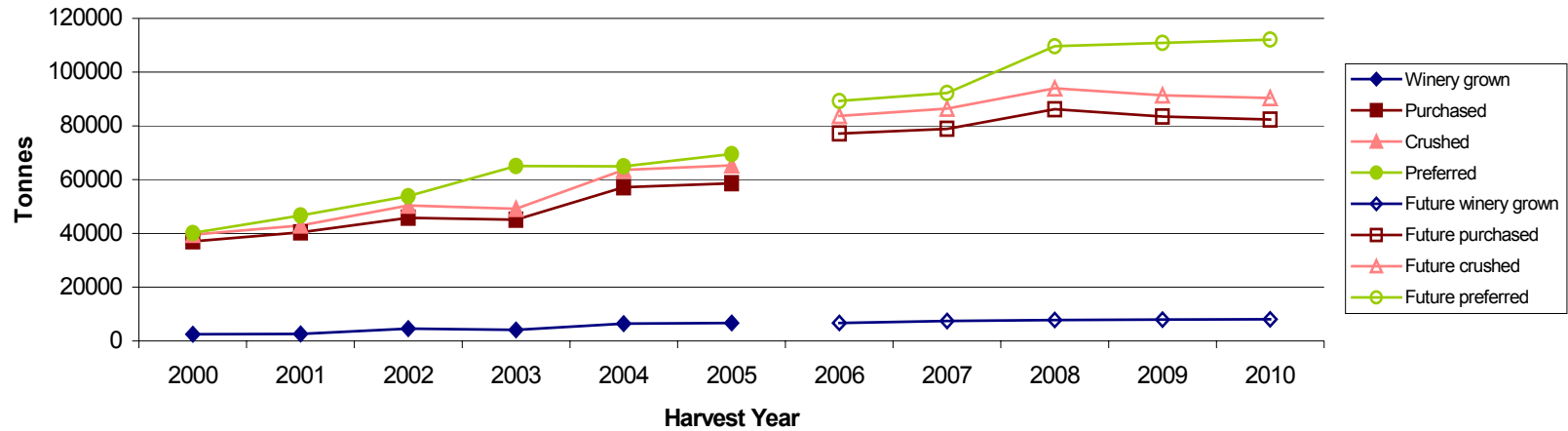
Historical trends in production & forecasts for Semillon



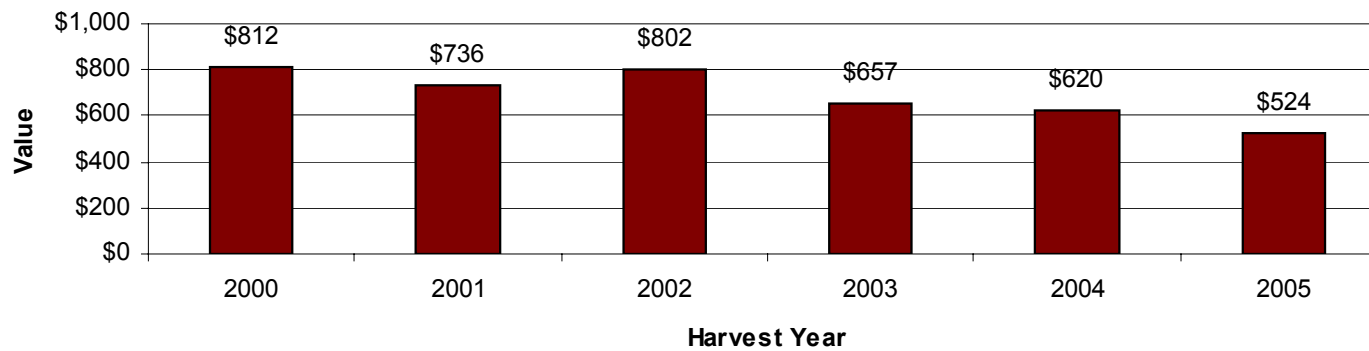
Historical value of Calculated Average Purchase Value per tonne for Semillon



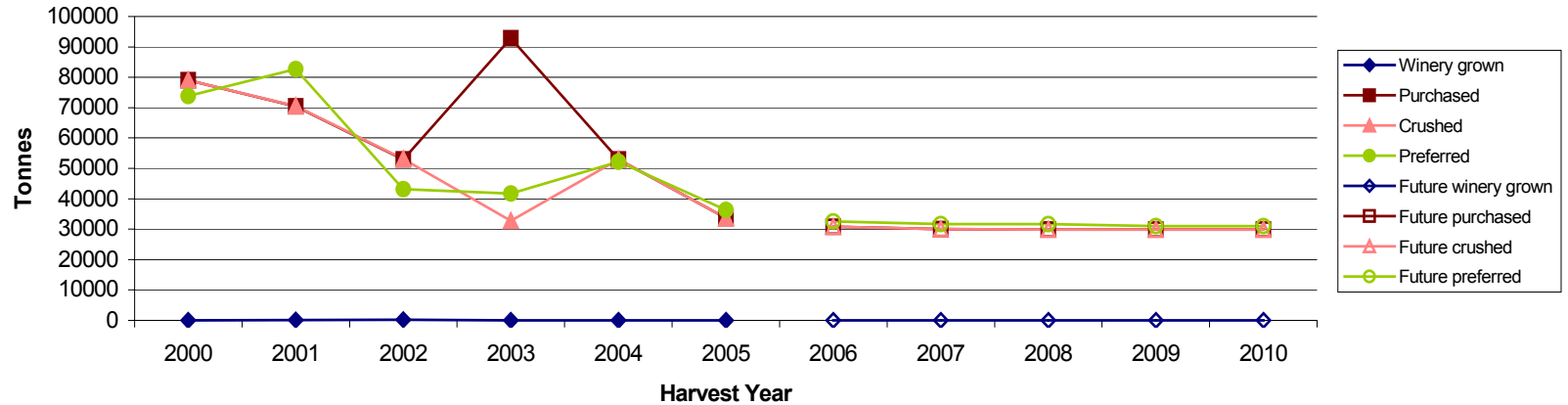
Historical trends in production & forecasts for Shiraz



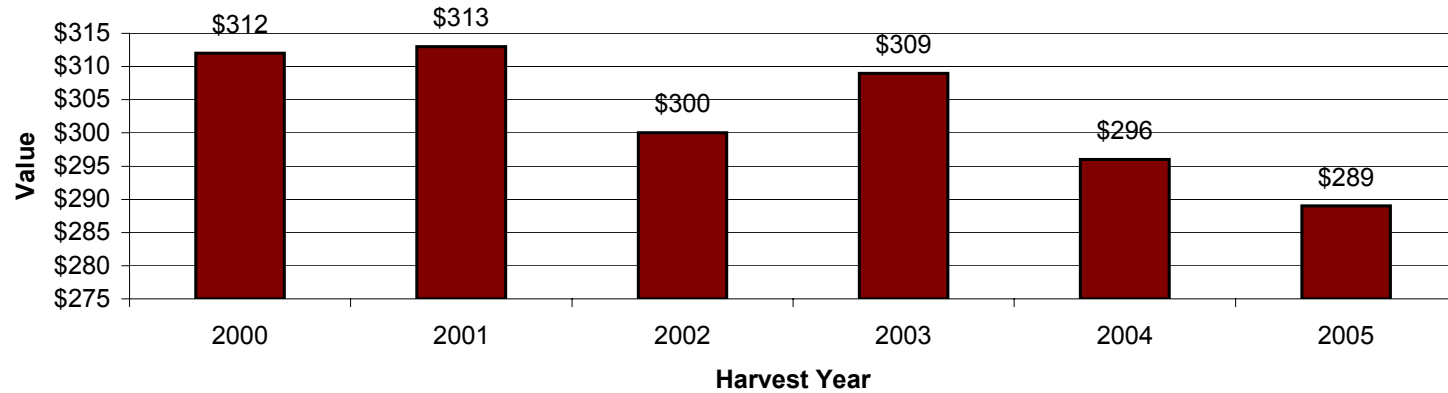
Historical value of Calculated Average Purchase Value per tonne for Shiraz



Historical trends in production & forecasts for Sultana



Historical value of Calculated Average Purchase Value for Sultana





List of Wineries Returning Survey Forms 2005

THANK YOU TO THE FOLLOWING WINERIES WHO RESPONDED TO THE 2005 SURVEY

Andrew Peace Wines
Beringer Blass Limited
Bests Great Western
Brown Brothers Milawa
Brumby Wines
Casella Wines Limited
Chandon
De Bortoli Wines Pty Ltd
Deakin Estate
Dorrien Estate Winery
Evans & Tate
Hardy Wine Company

Kingston Estate Wines Pty Ltd
McGuigan Simeon Wines Ltd
McPherson Wines
McWilliams Wines Pty Ltd
Mitchelton Winery
New Glory
Nugan Estate
Oak Valley Estate Boutique Winery
Orlando-Wyndham
Pettavel Wines
R.L. Buller & Son Pty Ltd
Riverina Wines Pty Ltd

Rivers Wines
Roberts Estate
Salena Estates
Southcorp Wines
Tall Poppy Wines
Tandou Wines
Terrell
Toorak Wines Pty Ltd
Trentham Estate
Victorian Alps Wine Company P/L
Yalumba Wines
Zilzie Wines