DEPARTMENT OF
PRIMARY INDUSTRIES

Wine Grape Crush Survey 2009

Murray Darling / Swan Hill

Victoria
The Place To Be

ACKNOWLEDGEMENTS

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, comprising winery and grower representatives from the Murray Darling and Swan Hill regions.

The publication of this survey is made possible through the support of the wineries that processed fruit from Murray Darling and/or Swan Hill vineyards in 2009.

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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 three years, together with an assessment of the tonnes that wine makers would prefer to receive.

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.

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.

Committed Intake – Own Grapes, Committed Intake – Purchased Grapes, Total Required Intake for the next 3 years

The tonnages wineries are committed to crush for the next 3 years, and they would prefer to crush 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 projections 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 projections 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.

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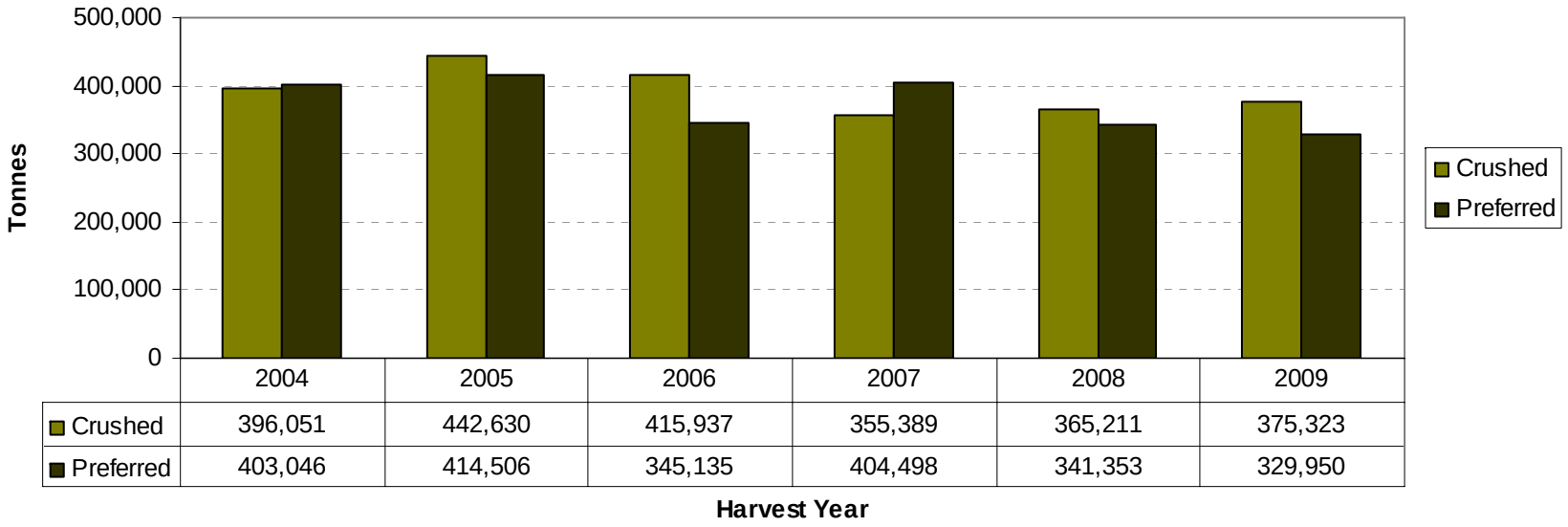
Summary Data and Yearly Trends

TOTAL TONNES CRUSHED AND TOTAL CROP VALUE

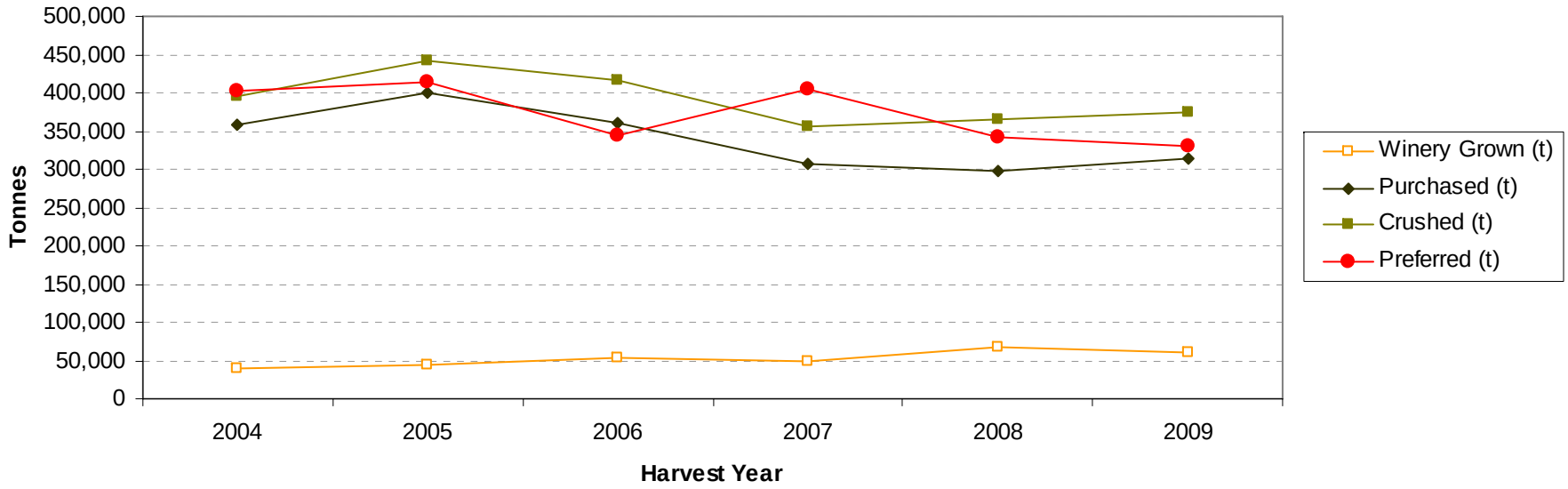
	Total winery grown	Total purchased	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Estimated value of purchased grapes	Estimated value of total crush
Red	29,771	133,252	163,022	150,089	82%	109%	$54,233,772	$66,256,363
White	30,810	181,490	212,300	179,861	85%	118%	$61,563,747	$72,329,835
Total	**60,581**	**314,742**	**375,323**	**329,950**	**84%**	**114%**	**$115,797,520**	**$138,586,198**

ACTUAL AND PREFERRED TONNAGES SINCE 2004

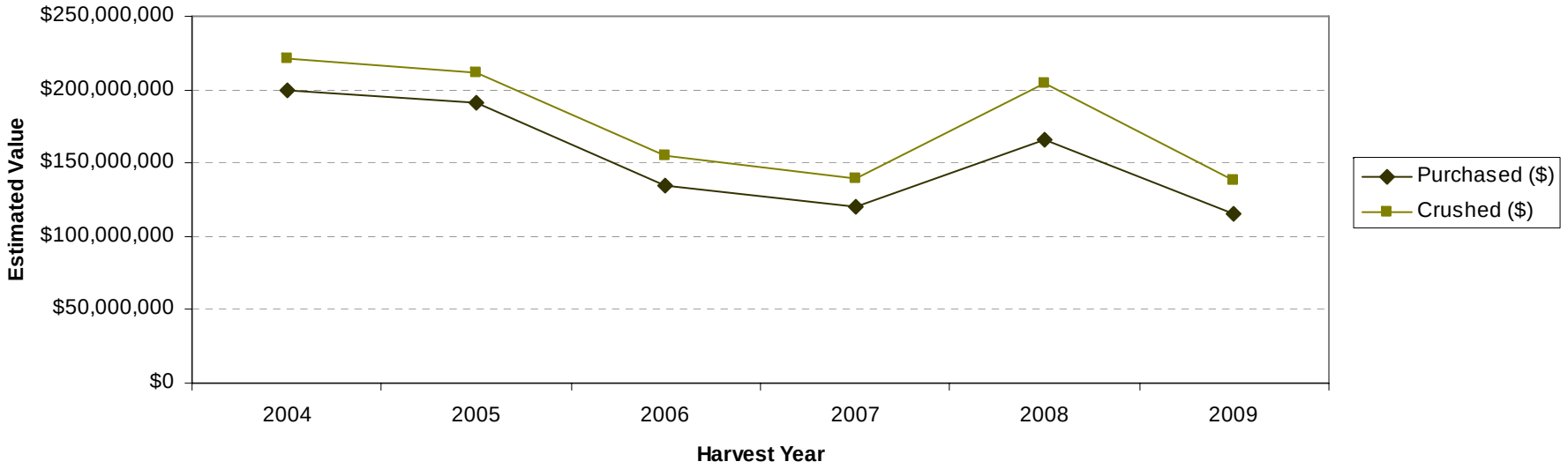


	2004	2005	2006	2007	2008	2009
Crushed	396,051	442,630	415,937	355,389	365,211	375,323
Preferred	403,046	414,506	345,135	404,498	341,353	329,950

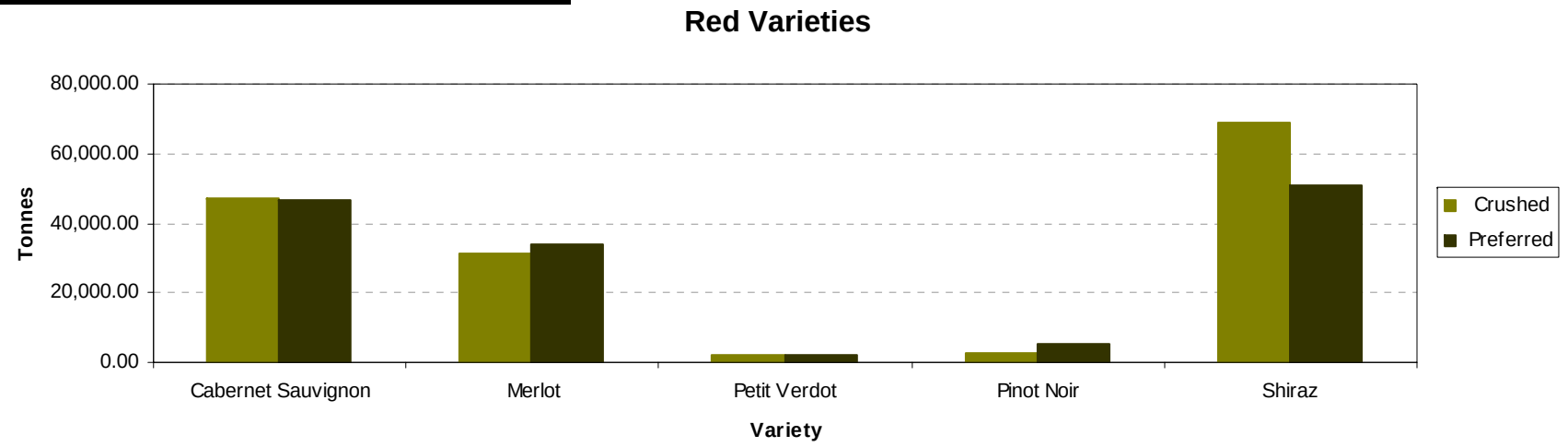
HISTORICAL TRENDS IN PRODUCTION

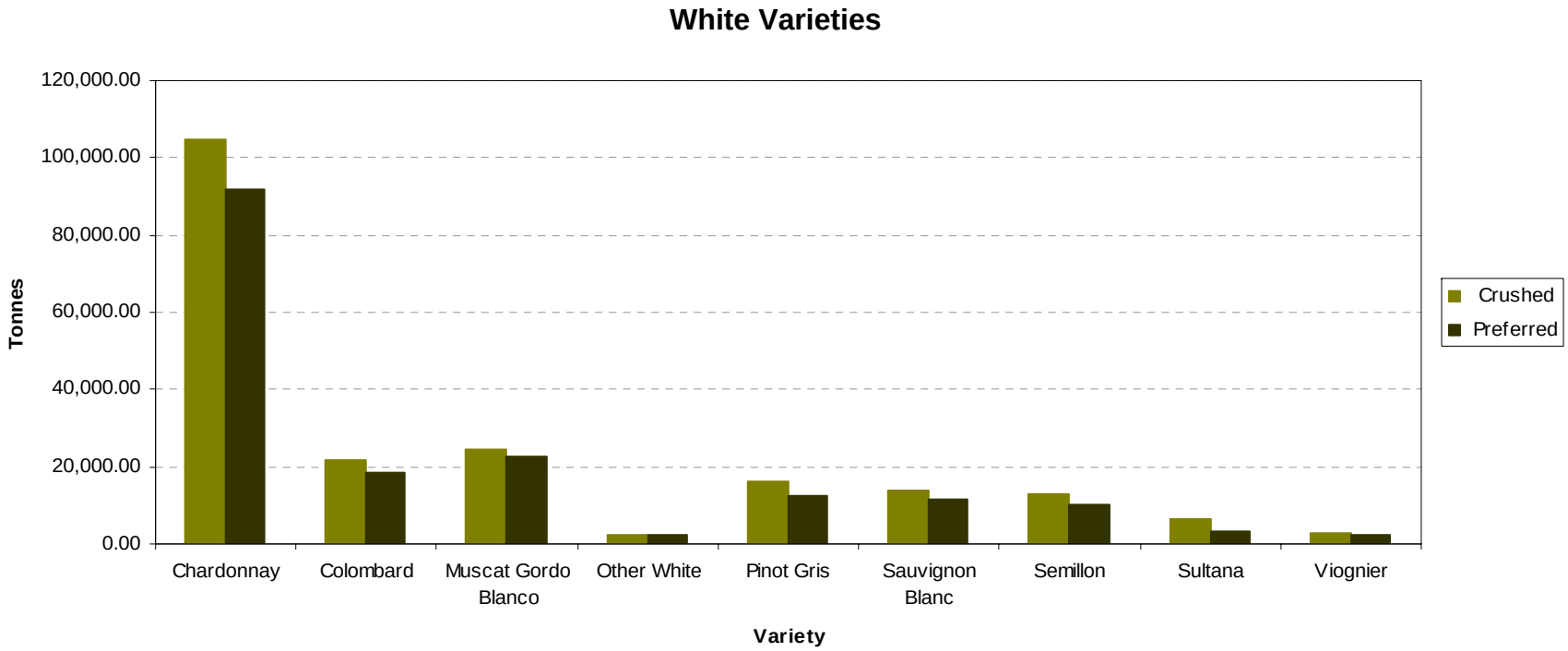


HISTORICAL TRENDS IN ESTIMATED VALUE OF PURCHASED FRUIT COMPARED TO TOTAL CRUSH



ACTUAL AND PREFERRED TONNAGES BY VARIETY

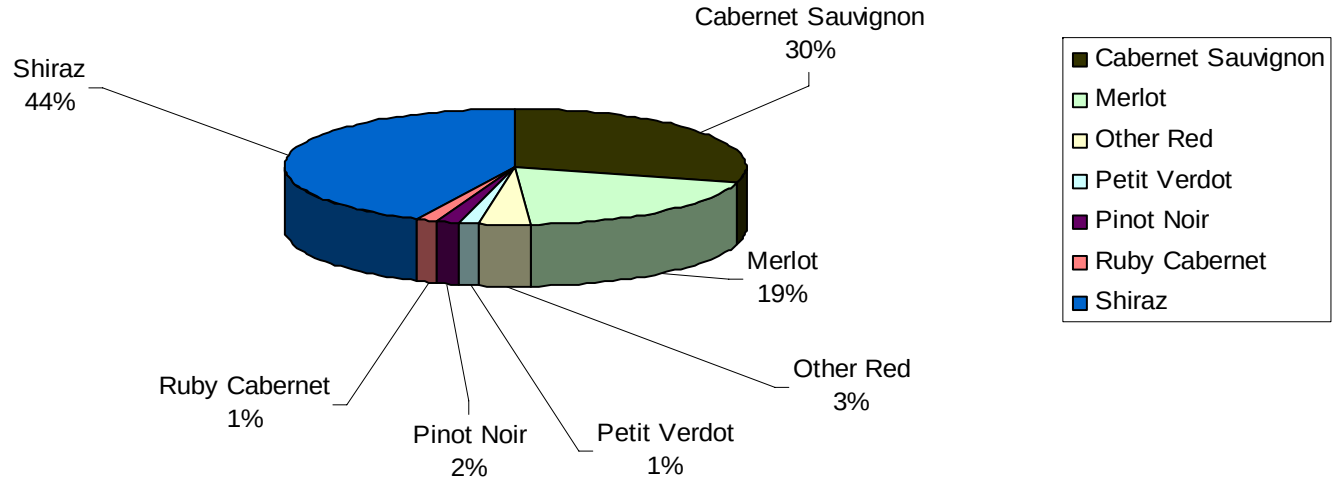




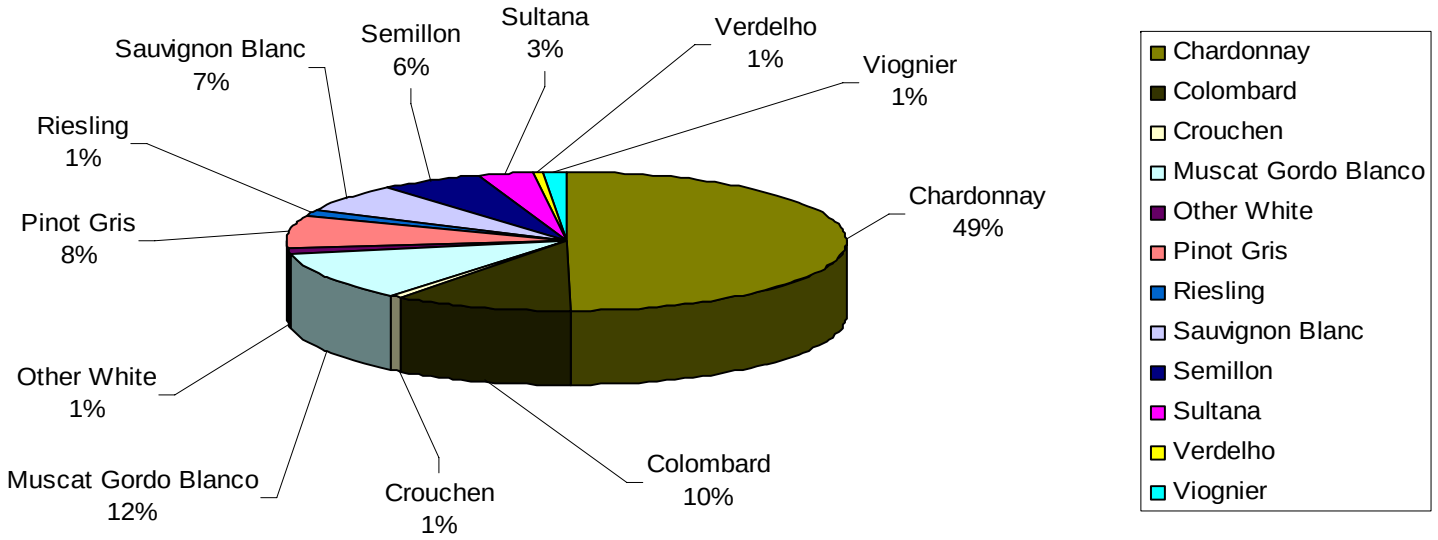
Note: Varieties with both crushed and preferred less than 2000 tonnes are not represented in these graphs.

PRECENTAGE OF TOTAL CRUSH BY VARIETY

Red Varieties



White Varieties



Note: Varieties with both crushed and preferred less than 1000 tonnes are not represented in these graphs.

Price and Tonnage Data

NOTES ON INFORMATION PROVIDED IN SECTION 2

Total crush

The total tonnes of grapes crushed from the Murray Darling / Swan Hill regions whether processed in that region, another region in Victoria or interstate. All wineries in Australia who source fruit from Murray Darling / Swan Hill vineyards are included in the survey collection process. Reported fruit is separated into fruit produced from the winery's own vineyards ("own grown") and from independent grower owned vineyards ("purchased").

Tonnes Purchased 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.

Calculated Average Purchase Value (formerly Weighted Average Weighbridge Price)

Calculated by dividing the total purchase value (post receival 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

Wineries are asked to report the highest and lowest prices paid for any parcel of fruit of a particular variety, of any size. The highest of all highest prices and the lowest of all lowest prices are reported – provided that at least three wineries have provided this information for any particular variety.

The highest or lowest price may be for a very small parcel of fruit - and/or reflect an unusual pricing arrangement - eg payment by the hectare rather than per tonne, "spot market" sales of excess fruit etc.

Total value of purchased grapes

Calculated as the Calculated Average Purchase Value multiplied by the total tonnes purchased.

Estimated Total Value of All Grapes

Calculated as the Calculated Average Purchase Value of purchased fruit multiplied by the total tonnes crushed, for each variety.

If there is a variety where there are no purchases, then the average purchase value across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes. 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.

INTAKE AND PRICE SUMMARY DATA BY VARIETY FOR RED GRAPES

Variety	PURCHASED GRAPES SUMMARY								
	Purchased (t)	Lowest price ($/t)	Highest price ($/t)	Total value purchased grapes ($)	Tonnes purchased as a % of total	Calculated average purchase value ($/t)	Winery grown fruit (t)	Total crushed (t)	Estimated total value ALL grapes ($)
Cabernet Sauvignon	38,919	$200	$750	$16,053,037	83%	$412	8,147	47,066	$19,413,336
Grenache	871	$312	$714	$394,220	90%	$453	97	968	$438,177
Malbec	0			$0	0%	$0	48	48	$19,648
Mataro	199			$47,372	60%	$238	131	330	$78,541
Merlot	23,822	$150	$650	$9,065,779	77%	$381	7,314	31,136	$11,849,391
Nebbiolo	0			$0	0%	$0	77	77	$31,523
Other Red	3,590	$150	$1,000	$1,170,278	65%	$326	1,966	5,556	$1,811,149
Petit Verdot	1,685	$200	$500	$660,901	74%	$392	587	2,272	$891,169
Pinot Noir	2,449	$300	$800	$1,163,020	87%	$475	364	2,813	$1,335,926
Ruby Cabernet	87			$43,610	4%	$500	1,881	1,968	$983,865
Sangiovese	281	$300	$500	$113,080	32%	$402	595	876	$352,110
Shiraz	60,716	$150	$750	$25,255,527	88%	$416	8,219	68,935	$28,674,287
Tarrango	146			$43,719	33%	$300	300	445	$133,572
Tempranillo	486	$250	$650	$223,230	92%	$460	44	530	$243,669
Total Red winegrapes	**133,252**			**$54,233,772**	**82%**		**29,771**	**163,022**	**$66,256,363**

** The Calculated Average Purchase Value (formerly Weighted Average Weighbridge Price or WAP) 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.

INTAKE AND PRICE SUMMARY DATA BY VARIETY FOR WHITE GRAPES

Variety	PURCHASED GRAPES SUMMARY								
	Purchased (t)	Lowest price ($/t)	Highest price ($/t)	Total value purchased grapes ($)	Tonnes purchased as a % of total	Calculated average purchase value ($/t)	Winery grown fruit (t)	Total crushed (t)	Estimated total value ALL grapes ($)
Canada Muscat	582			$197,853	99%	$340	6	588	$199,893
Chardonnay	90,086	$120	$750	$26,361,359	86%	$293	14,529	104,616	$30,612,999
Chenin Blanc	501			$230,312	100%	$459	0	501	$230,312
Colombard	20,883	$150	$375	$5,920,253	96%	$283	894	21,778	$6,173,745
Crouchen	693			$307,725	40%	$444	1,018	1,710	$759,921
Muscat Gordo Blanco	24,384	$250	$514	$8,924,782	100%	$366	71	24,455	$8,950,915
Other White	1,825	$300	$1,050	$722,232	78%	$396	522	2,347	$928,739
Pinot Gris	14,393	$300	$685	$8,788,027	88%	$611	1,931	16,324	$9,966,848
Riesling	1,832	$150	$556	$697,515	72%	$381	706	2,538	$966,298
Sauvignon Blanc	9,302	$150	$650	$4,243,354	67%	$456	4,525	13,827	$6,307,656
Semillon	8,096	$150	$450	$2,505,050	62%	$309	4,868	12,964	$4,011,296
Sultana	5,724	$138	$300	$1,559,524	90%	$272	670	6,393	$1,741,985
Taminga	0			$0	0%	$0	18	18	$6,118
Traminer	227			$68,085	100%	$300	0	227	$68,085
Verdelho	980	$250	$300	$267,855	73%	$273	359	1,339	$366,051
Viognier	1,981	$150	$850	$769,821	74%	$389	693	2,674	$1,038,973
Total White winegrapes	**181,490**			**$61,563,747**	**85%**		**30,810**	**212,300**	**$72,329,835**
Grand Total All winegrapes	**314,742**			**$115,797,520**	**84%**		**60,581**	**375,323**	**$138,586,198**

** The Calculated Average Purchase Value (formerly Weighted Average Weighbridge Price or WAP) 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.

INTAKE AND PRICE SUMMARY DATA BY VARIETY FOR RED GRAPES: MURRAY DARLING & SWAN HILL BASED WINERIES ONLY

Variety	PURCHASED GRAPES SUMMARY								
	Purchased (t)	Lowest price ($/t)	Highest price ($/t)	Total value purchased grapes ($)	Tonnes purchased as a % of total	Calculated average purchase value ($/t)	Winery grown fruit (t)	Total crushed (t)	Estimated total value ALL grapes ($)
Cabernet Sauvignon	32,564	$200	$650	$13,758,309	80%	$423	8,072	40,636	$17,168,656
Grenache	830	$312	$450	$371,860	90%	$448	97	927	$415,385
Malbec	0			$0	0%	$0	48	48	$20,010
Mataro	0			$0	0%	$0	131	131	$54,245
Merlot	13,871	$150	$650	$5,328,432	65%	$384	7,314	21,185	$8,138,307
Nebbiolo	0			$0	0%	$0	77	77	$32,104
Other Red	3,119	$260	$1,000	$900,974	95%	$289	173	3,292	$950,895
Petit Verdot	1,331	$350	$450	$540,928	69%	$407	587	1,918	$779,626
Pinot Noir	1,890	$300	$700	$879,506	84%	$465	364	2,254	$1,048,920
Ruby Cabernet	0			$0	0%	$0	1,881	1,881	$779,401
Sangiovese	228	$300	$500	$90,411	28%	$397	595	823	$326,344
Shiraz	51,341	$150	$700	$21,709,833	87%	$423	7,823	59,164	$25,017,784
Tempranillo	389	$250	$650	$171,284	100%	$440	0	389	$171,284
Total Red winegrapes	**105,562**			**$43,751,537**	**80%**		**27,163**	**132,725**	**$54,902,961**

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INTAKE AND PRICE SUMMARY DATA BY VARIETY FOR WHITE GRAPES: MURRAY DARLING & SWAN HILL BASED WINERIES ONLY

Variety	PURCHASED GRAPES SUMMARY								
	Purchased (t)	Lowest price ($/t)	Highest price ($/t)	Total value purchased grapes ($)	Tonnes purchased as a % of total	Calculated average purchase value ($/t)	Winery grown fruit (t)	Total crushed (t)	Estimated total value ALL grapes ($)
Canada Muscat	582			$197,853	99%	$340	6	588	$199,893
Chardonnay	73,144	$150	$700	$21,930,991	84%	$300	13,967	87,111	$26,118,677
Chenin Blanc	133			$43,015	100%	$323	0	133	$43,015
Colombard	20,220	$150	$367	$5,769,465	96%	$285	894	21,114	$6,024,606
Crouchen	23			$6,894	4%	$300	499	522	$156,636
Muscat Gordo Blanco	19,344	$250	$514	$7,164,778	100%	$370	71	19,415	$7,191,224
Other White	1,766	$300	$1,050	$680,009	98%	$385	33	1,799	$692,718
Pinot Gris	4,644	$300	$600	$2,254,976	71%	$486	1,931	6,575	$3,192,474
Riesling	1,238	$150	$420	$403,603	64%	$326	706	1,944	$633,686
Sauvignon Blanc	8,690	$150	$600	$3,983,534	66%	$458	4,525	13,215	$6,057,870
Semillon	7,649	$150	$450	$2,381,125	61%	$311	4,868	12,517	$3,896,484
Sultana	5,724	$138	$300	$1,559,524	90%	$272	670	6,393	$1,741,985
Taminga	0			$0	0%	$0	18	18	$5,832
Traminer	227			$68,085	100%	$300	0	227	$68,085
Verdelho	906	$250	$300	$247,639	72%	$273	359	1,265	$345,835
Viognier	1,380	$150	$400	$444,942	67%	$322	693	2,073	$668,254
Total White winegrapes	**145,670**			**$47,136,432**	83%		**29,240**	**174,910**	**$57,037,274**
Grand Total All winegrapes	**251,232**			**$90,887,969**	**82%**		**56,402**	**307,634**	**$111,940,235**

** The Calculated Average Purchase Value (formerly Weighted Average Weighbridge Price or WAP) 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.

Estimates of Expected and Preferred Intakes

NOTES ON INFORMATION PROVIDED IN SECTION 3

ESTIMATES OF EXPECTED AND PREFERRED INTAKES FOR THE NEXT THREE YEARS

Committed intake – own grapes

The estimated tonnage of grapes sourced from winery owned or leased vineyards. This includes grapes owned by subsidiary or affiliated companies.

This figure takes into account intended new plantings that will come into bearing or intended removals during the projection period.

Committed intake – contracted purchases

Grapes wineries are committed to purchase in the projected year. Any arrangements that they consider to be binding are included. This may be written contracts or verbal agreements.

Only existing arrangements are reported. Planned or possible future contracts or renewals are not included.

Total required intake – demand

The total requirement for grapes to meet projected sales projections. This does not include planned purchases of bulk wine.

The % required/committed intake shows the percentage of the wineries' requirement that is already committed for a given year. Eg a figure of 83% indicates that wineries already have contracts (or own grown fruit) to supply 83% of their demand for that year.

Note:

- ***Not all wineries provide estimates of future intakes - particularly for the later projected years. Therefore projections for later years tend to underreport actual demand. The projections of future intake should be interpreted and used cautiously. It should be noted that there is considerable variation from one survey to the next in demand projections for the same future projected year, as marketing indications change. The projections should only be interpreted as general indications of current levels of confidence, and trends in varietal preferences.***

Wine grapes sought on the open market

This figure is inferred from the difference between committed intake (own grown & purchased) and total required intake.

Projected supply

This figure has been provided from the Australian Bureau of Agricultural and Resource Economics (ABARE).

Note:

- ***Projections regarding supply/demand should be regarded as a guide only. Growers should always conduct thorough research before committing to vine removals and planting. Consideration of new plantings should include whether secure markets will be available for the fruit when it comes into production. Increasingly, supply/demand is influenced by factors outside the region, i.e. over or under supply in other regions in Australia and elsewhere in the world, so regional figures must be considered in that context.***

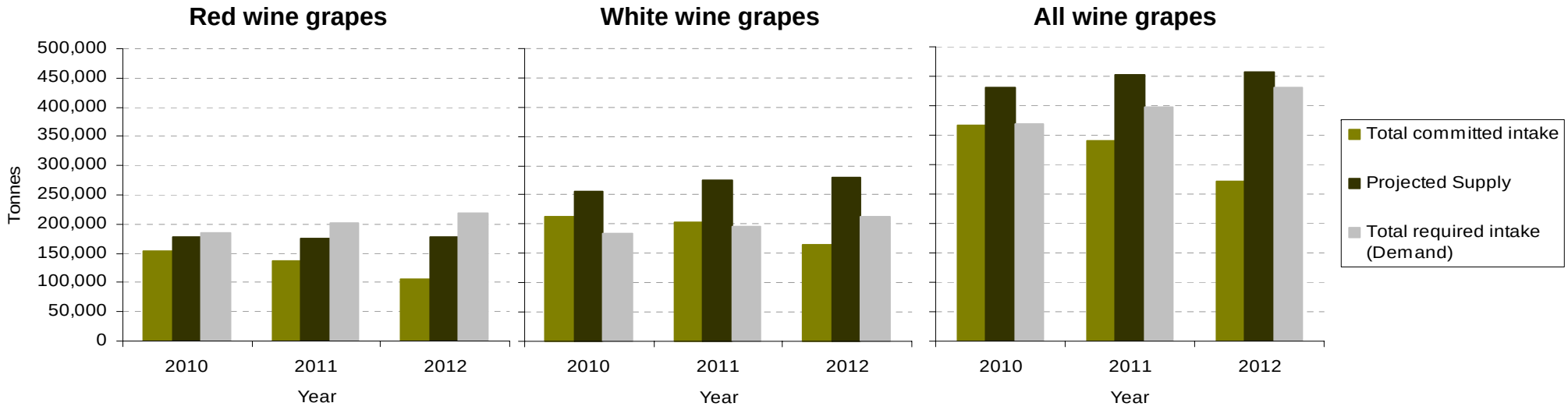
Wine grapes available on the open market

This figure is inferred from the difference between supply and committed intake (own grown & purchased).

Surplus or shortfall of grapes on the open market

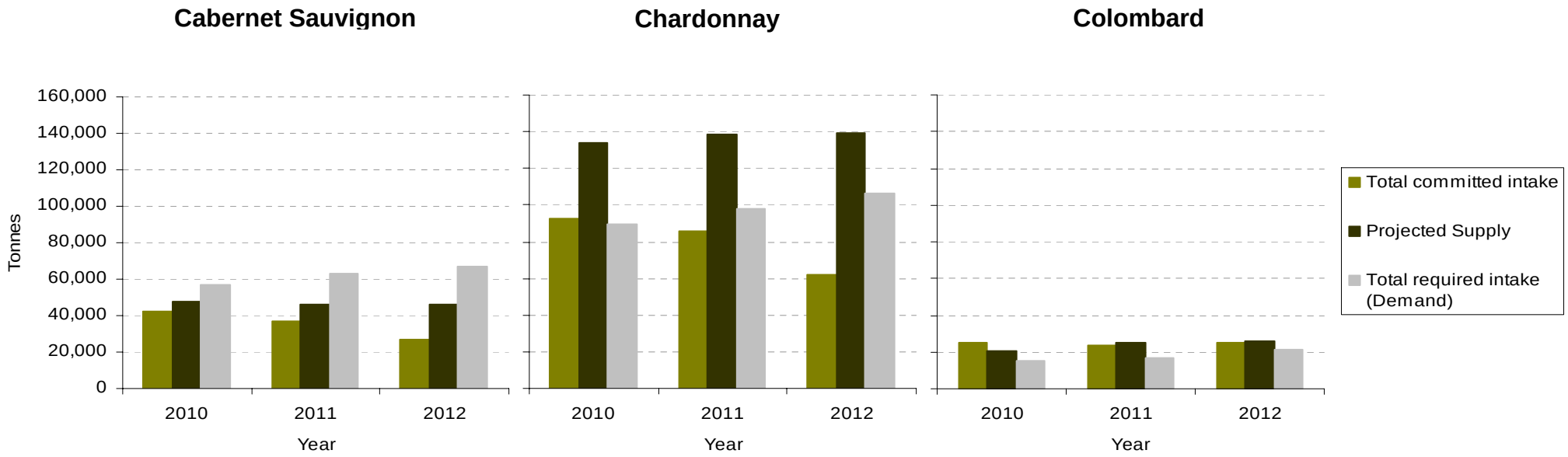
The difference between wine grapes sought on the open market and wine grapes available on the open market. However, when both projected supply and committed intake is greater than total required intake (demand), then the surplus/shortfall is recorded as zero. A negative number indicates a shortfall and a positive number indicates surplus.

	Winery grown grapes	Contract purchases	Total committed intake	Total required intake (Demand)	% required intake that is committed	Winegrapes sought on the open market	Projected Supply	Winegrapes available on the open market	Surplus or shortfall of grapes on the open market	Surplus or shortfall as a percentage of demand
Red wine grapes										
2010	30,234	123,091	153,325	184,990	83%	31665	176,853	23,529	-8,136	-4%
2011	31,509	106,341	137,850	201,233	69%	63383	176,546	38,697	-24,687	-12%
2012	31,581	74,513	106,094	218,772	48%	112678	178,501	72,407	-40,271	-18%
White wine grapes										
2010	**34,181**	**178,395**	**212,576**	**184,954**	115%	-27622	**255,276**	42,700	**42,700**	23%
2011	**46,613**	**157,203**	**203,816**	**197,117**	103%	-6699	**274,913**	71,097	**71,097**	36%
2012	**49,086**	**115,530**	**164,615**	**212,251**	78%	47635	**279,640**	115,024	**67,389**	32%
All wine grapes										
2010	**64,415**	**301,485**	**365,900**	**369,944**	99%	4043	**432,129**	66,229	**62,186**	17%
2011	**78,122**	**263,544**	**341,666**	**398,350**	86%	56684	**451,459**	109,793	**53,109**	13%
2012	**80,667**	**190,043**	**270,710**	**431,023**	63%	160313	**458,141**	187,431	**27,118**	6%

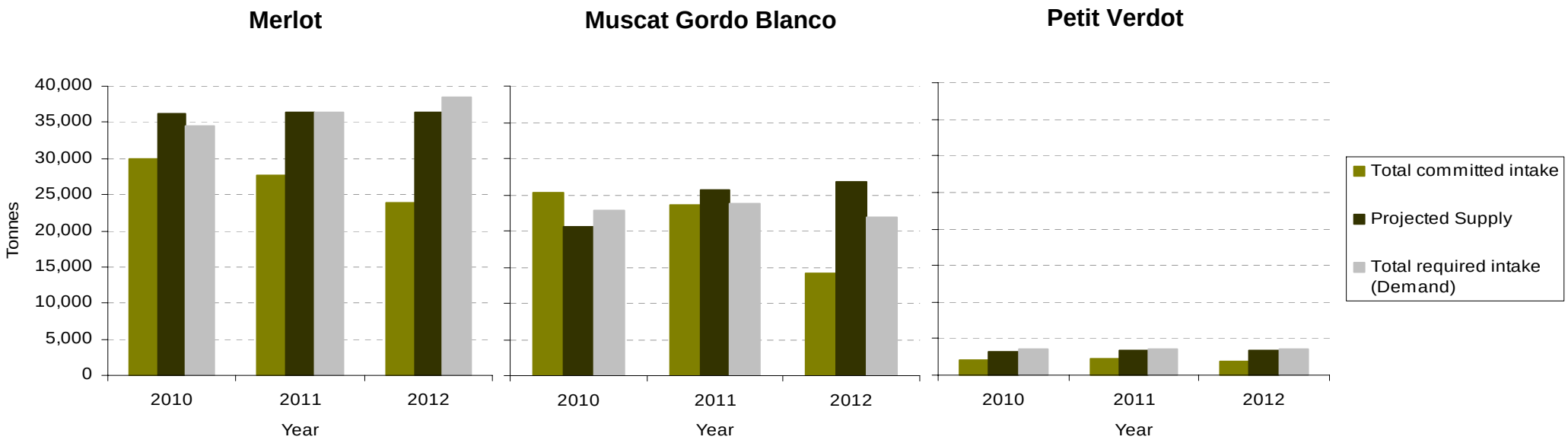


SUPPLY AND DEMAND ANALYSIS – MAJOR VARIETIES

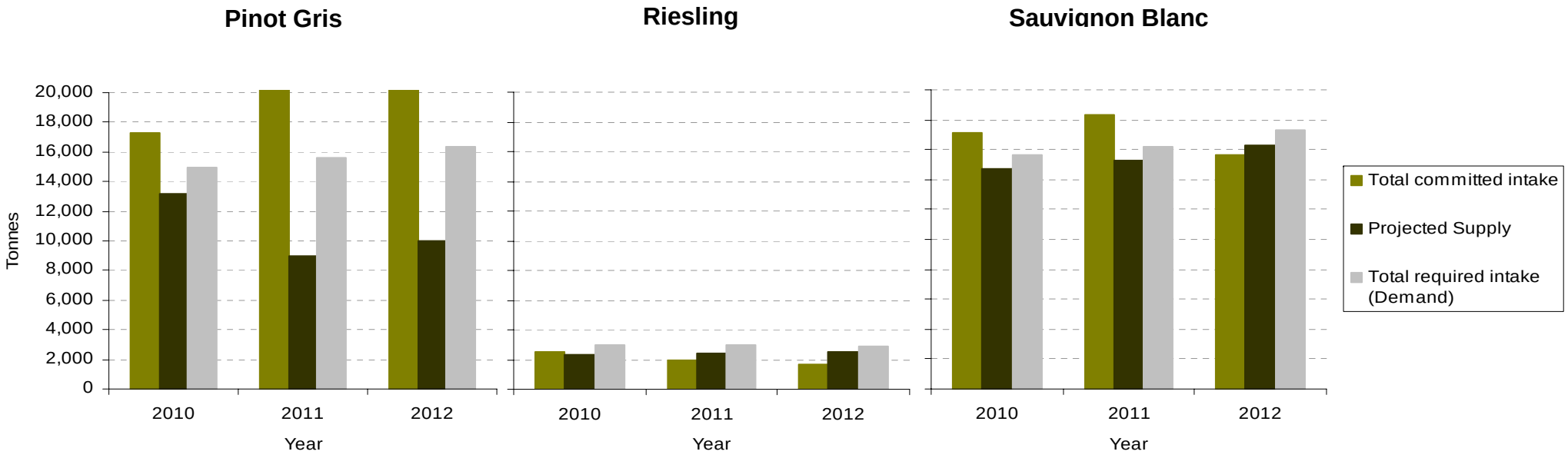
	Winery grown grapes	Contract purchases	Total committed intake	Total required intake (Demand)	% required intake that is committed	Winegrapes sought on the open market	Projected Supply	Winegrapes available on the open market	Surplus or shortfall of grapes on the open market	Surplus or shortfall as a percentage of demand
Cabernet Sauvignon										
2010	7,951	34,645	42,596	57,292	74%	14695	47,347	4,750	-9,945	-17%
2011	8,001	28,628	36,629	63,306	58%	26677	46,186	9,557	-17,120	-27%
2012	8,001	18,816	26,817	67,229	40%	40412	46,414	19,597	-20,815	-31%
Chardonnay										
2010	13,725	79,216	92,941	89,285	104%	-3656	134,338	41,397	41,397	46%
2011	22,602	62,818	85,419	97,879	87%	12459	138,923	53,504	41,044	42%
2012	22,602	39,654	62,256	106,709	58%	44453	139,559	77,303	32,850	31%
Colombard										
2010	1,295	23,484	24,779	15,344	161%	-9435	20,340	-4,439	0	0%
2011	2,865	20,639	23,504	16,806	140%	-6698	25,475	1,971	1,971	12%
2012	3,912	21,548	25,459	20,989	121%	-4471	25,826	366	366	2%



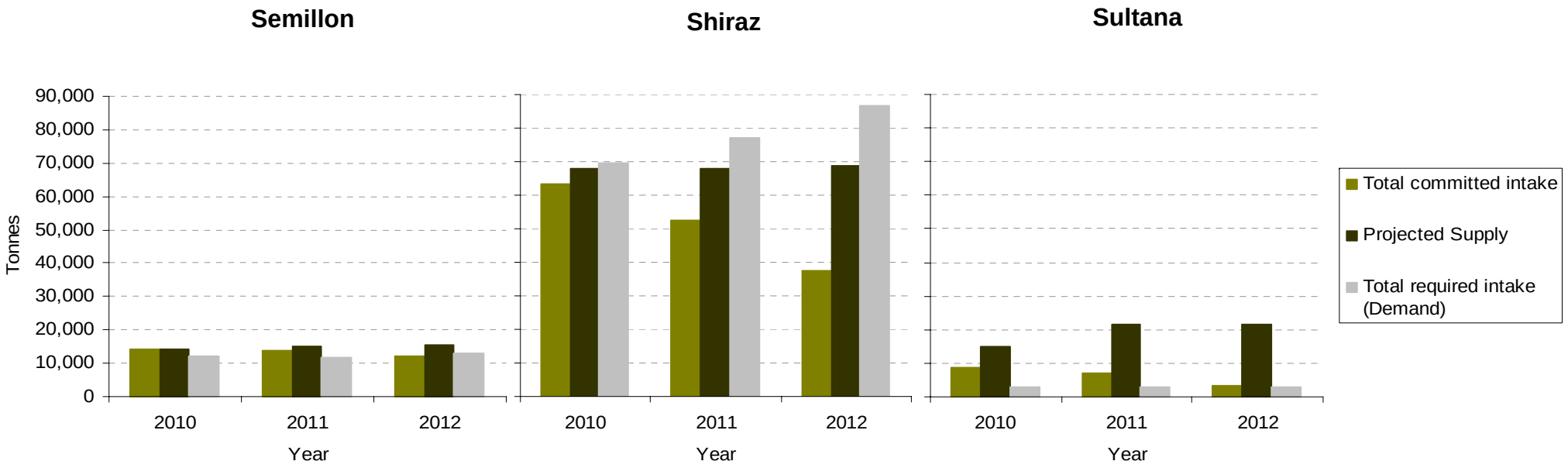
	Winery grown grapes	Contract purchases	Total committed intake	Total required intake (Demand)	% required intake that is committed	Winegrapes sought on the open market	Projected Supply	Winegrapes available on the open market	Surplus or shortfall of grapes on the open market	Surplus or shortfall as a percentage of demand
Merlot										
2010	7,637	22,278	29,914	34,500	87%	4585	36,248	6,334	1,748	5%
2011	8,055	19,709	27,764	36,438	76%	8674	36,354	8,590	-84	0%
2012	8,055	15,807	23,862	38,543	62%	14680	36,373	12,511	-2,169	-6%
Muscat Gordo Blanco										
2010	628	24,617	25,245	22,808	111%	-2437	20,537	-4,708	-2,271	-10%
2011	1,165	22,458	23,623	23,767	99%	143	25,693	2,069	1,926	8%
2012	1,545	12,512	14,057	21,882	64%	7824	26,741	12,684	4,860	22%
Petit Verdot										
2010	452	1,576	2,029	3,542	57%	1514	3,184	1,155	-358	-10%
2011	682	1,526	2,209	3,582	62%	1373	3,364	1,155	-218	-6%
2012	682	1,228	1,910	3,638	53%	1728	3,361	1,451	-277	-8%



	Winery grown grapes	Contract purchases	Total committed intake	Total required intake (Demand)	% required intake that is committed	Winegrapes sought on the open market	Projected Supply	Winegrapes available on the open market	Surplus or shortfall of grapes on the open market	Surplus or shortfall as a percentage of demand
Pinot Gris										
2010	2,082	15,189	17,271	14,981	115%	-2290	13,169	-4,102	-1,811	-12%
2011	2,197	18,027	20,224	15,574	130%	-4650	9,004	-11,220	-6,570	-42%
2012	2,595	18,673	21,269	16,359	130%	-4909	9,960	-11,309	-6,400	-39%
Riesling										
2010	754	1,795	2,549	2,998	85%	449	2,305	-243	-692	-23%
2011	607	1,387	1,994	2,982	67%	988	2,465	471	-517	-17%
2012	607	1,083	1,690	2,869	59%	1179	2,467	776	-402	-14%
Sauvignon Blanc										
2010	5,995	11,127	17,121	15,651	109%	-1471	14,750	-2,372	-901	-6%
2011	6,879	11,472	18,351	16,160	114%	-2191	15,268	-3,083	-892	-6%
2012	7,057	8,601	15,658	17,293	91%	1635	16,268	610	-1,025	-6%



	Winery grown grapes	Contract purchases	Total committed intake	Total required intake (Demand)	% required intake that is committed	Winegrapes sought on the open market	Projected Supply	Winegrapes available on the open market	Surplus or shortfall of grapes on the open market	Surplus or shortfall as a percentage of demand
Semillon										
2010	5,657	8,546	14,204	11,974	119%	-2230	14,179	-25	0	0%
2011	5,740	8,272	14,012	11,734	119%	-2279	15,271	1,259	1,259	11%
2012	5,740	6,586	12,326	13,003	95%	677	15,408	3,082	2,405	18%
Shiraz										
2010	8,716	54,479	63,194	69,425	91%	6231	67,762	4,568	-1,663	-2%
2011	8,609	44,066	52,675	76,926	68%	24251	68,115	15,440	-8,811	-11%
2012	8,677	28,836	37,513	86,736	43%	49223	68,849	31,336	-17,887	-21%
Sultana										
2010	523	8,104	8,627	3,045	283%	-5582	14,731	6,104	6,104	200%
2011	523	6,550	7,074	3,003	236%	-4071	21,604	14,530	14,530	484%
2012	523	2,652	3,176	2,998	106%	-178	21,718	18,542	18,542	619%



Trend Graphs for Selected Varieties

NOTES ON TREND GRAPHS PROVIDED IN SECTION 4

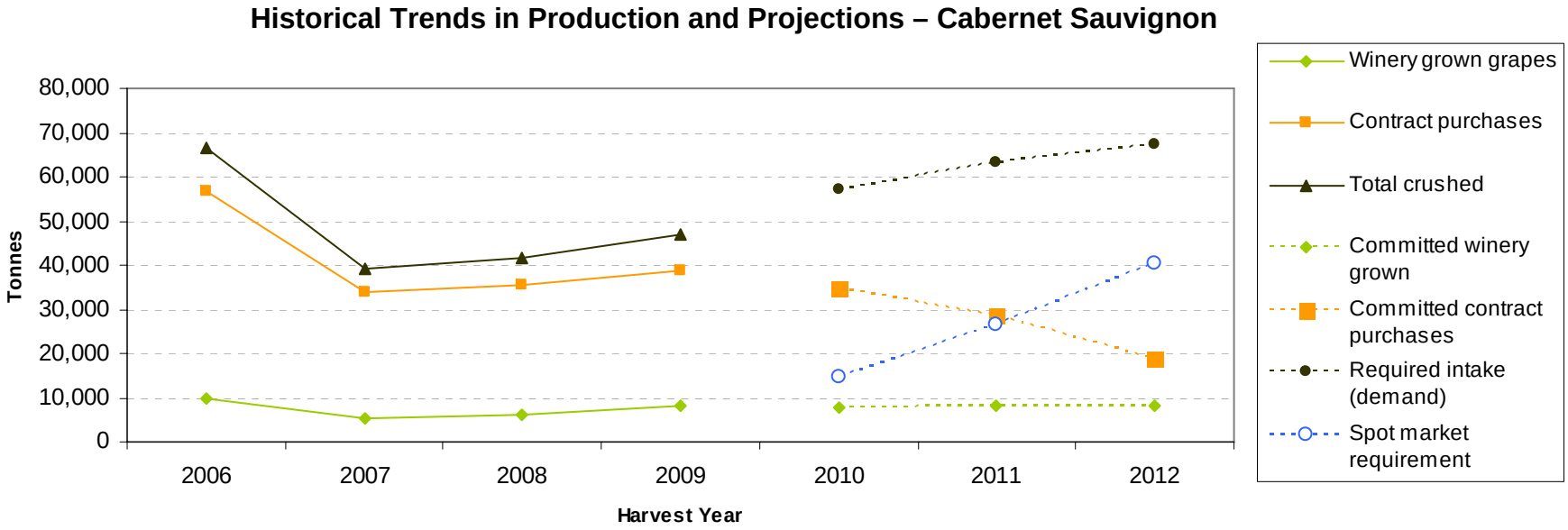
The following graphs show the historical trends in tonnages for the 3 years preceding the current vintage where data exists and for the next 3 years where projected data is available.

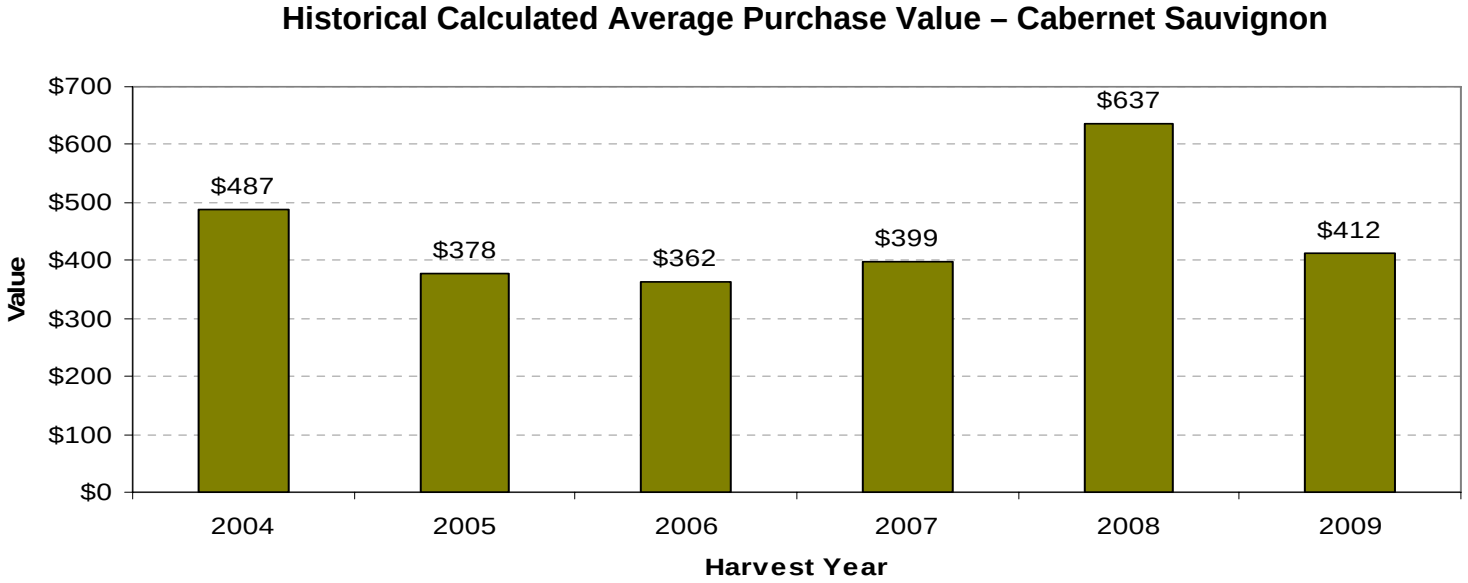
Where data exists, graphs showing the historical trend in weighted average price for 5 years preceding the current vintage are also included. These graphs represent the Calculated Average Purchase Value per Tonne (formerly Weighted Average Weighbridge Price) for all wine grapes purchased from the Murray Darling / Swan Hill regions, not only those purchased by Sunraysia wineries.

Graphs have been provided for major varieties in the 2009 vintage.

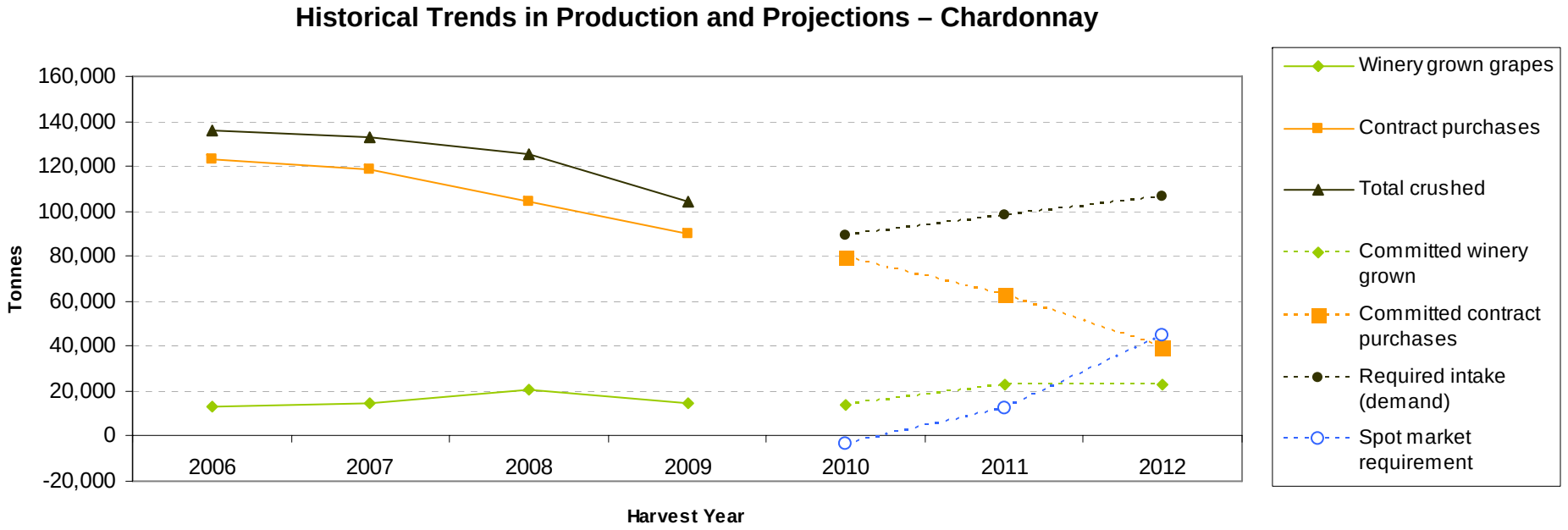
It is important to note that wineries were asked to only provide committed purchase figures on their existing arrangements. Planned or possible future contracts or renewals have not been taken into account in this figure. The projected spot market requirement may therefore change over time as contracts are renewed or new contracts signed.

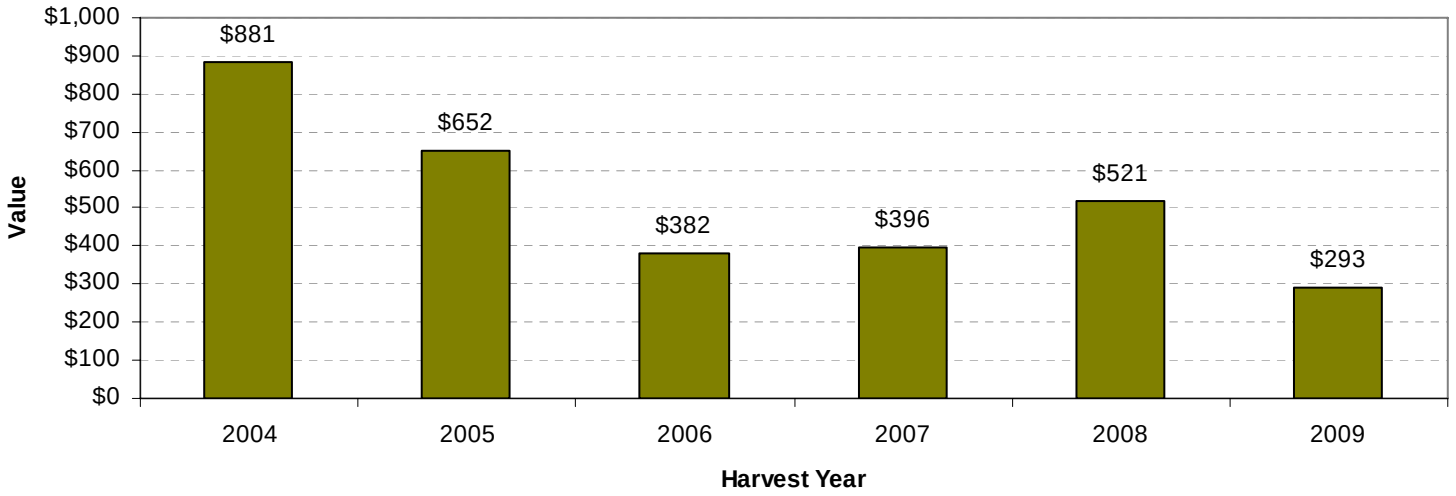
Cabernet Sauvignon



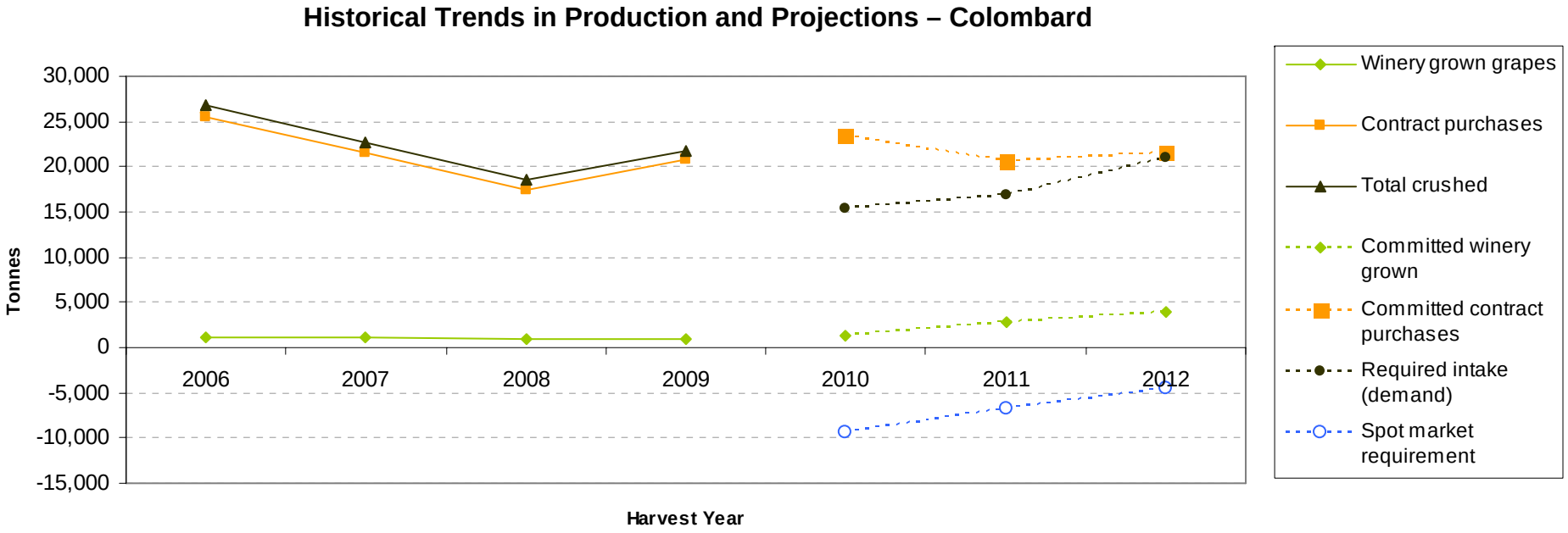


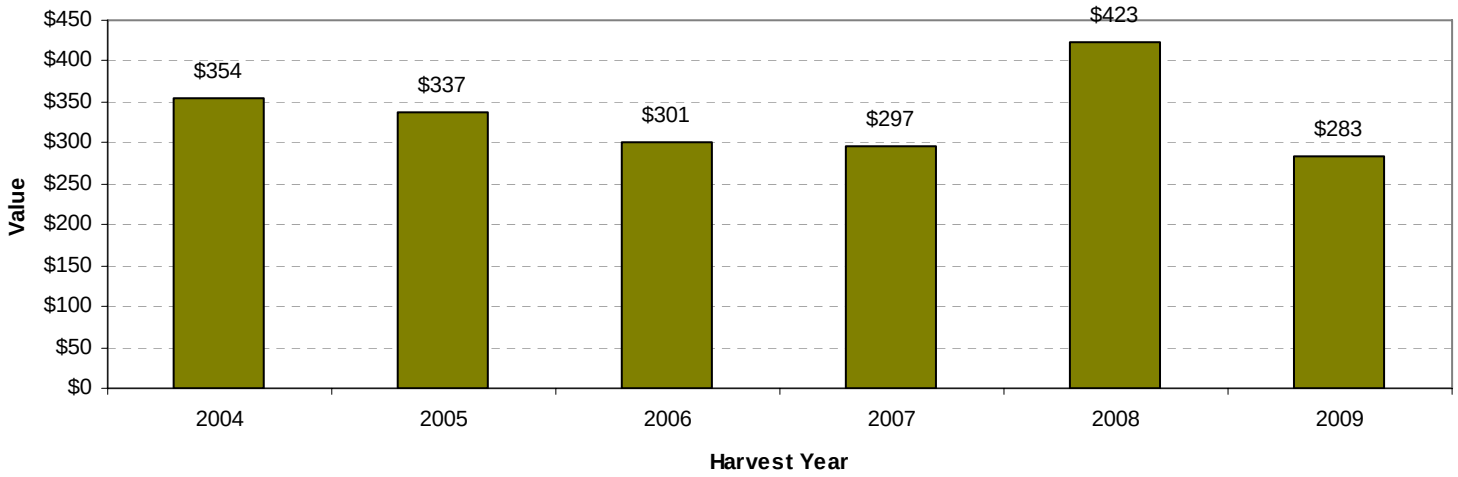
Chardonnay


Historical Trends in Production and Projections – Chardonnay
160,000
140,000
120,000
100,000
80,000
60,000
40,000
20,000
0
-20,000
Tonnes
2006
2007
2008
2009
2010
2011
2012
Harvest Year
Winery grown grapes
Contract purchases
Total crushed
Committed winery grown
Committed contract purchases
Required intake (demand)
Spot market requirement


Historical Calculated Average Purchase Value – Chardonnay
$1,000
$900
$800
$700
$600
$500
$400
$300
$200
$100
$0
Value
$881
$652
$382
$396
$521
$293
2004
2005
2006
2007
2008
2009
Harvest Year

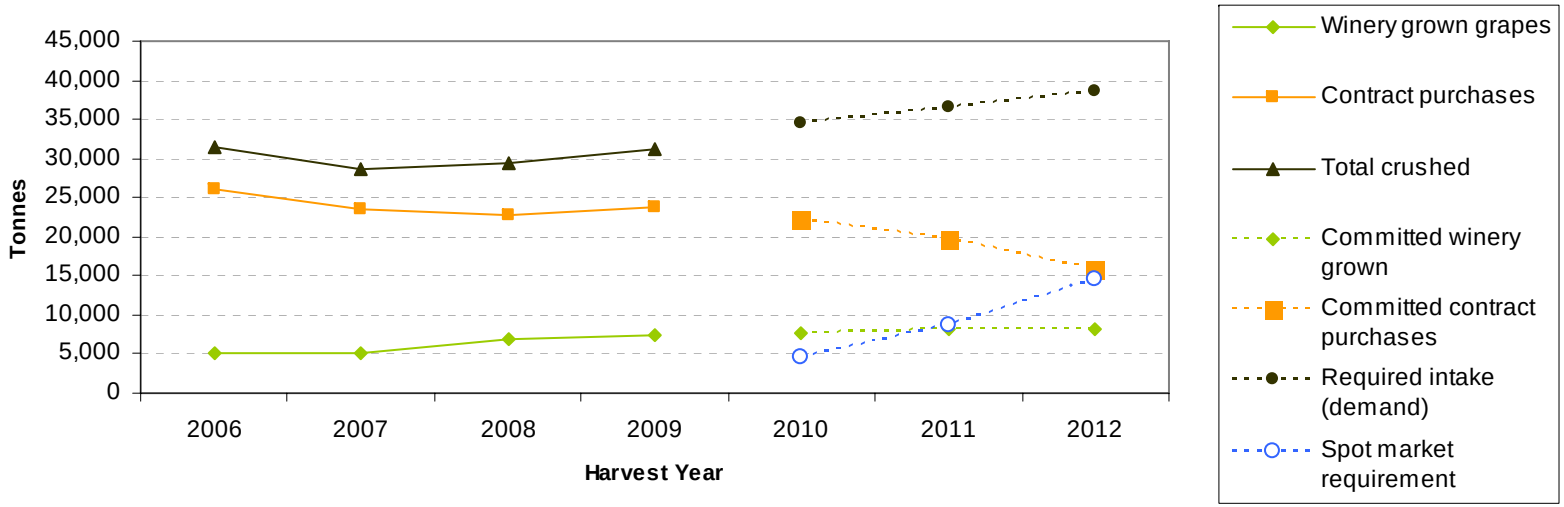
Colombard


Historical Trends in Production and Projections – Colombard
30,000
25,000
20,000
15,000
10,000
5,000
0
-5,000
-10,000
-15,000
Tonnes
2006
2007
2008
2009
2010
2011
2012
Harvest Year
Winery grown grapes
Contract purchases
Total crushed
Committed winery grown
Committed contract purchases
Required intake (demand)
Spot market requirement

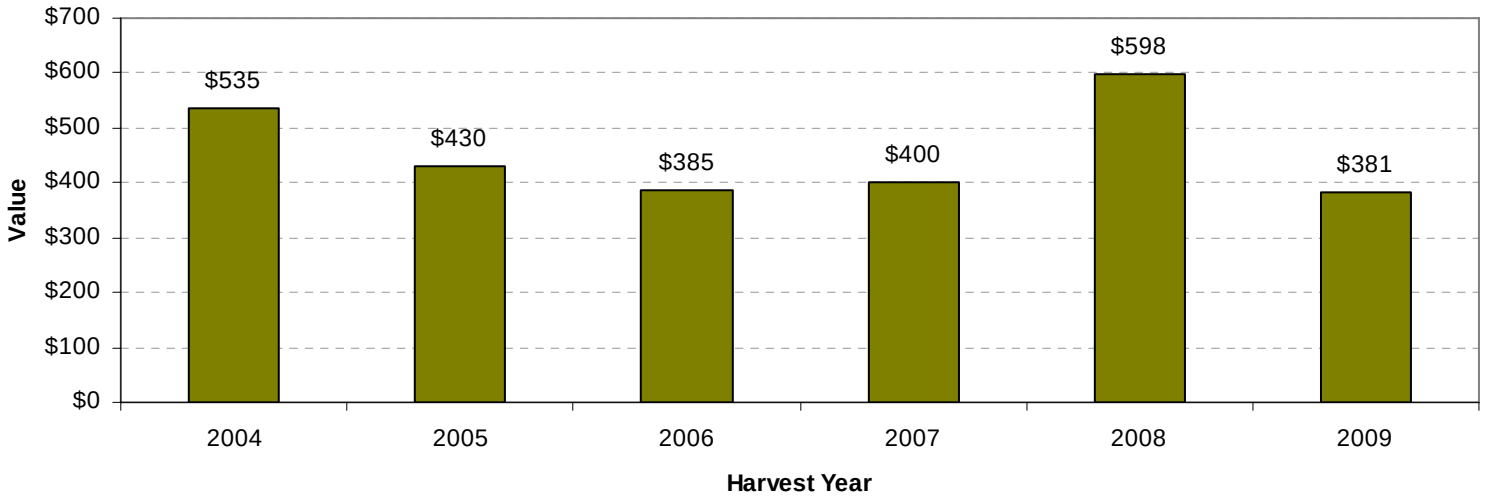

Historical Calculated Average Purchase Value – Colombard
$450
$400
$350
$300
$250
$200
$150
$100
$50
$0
Value
$354
$337
$301
$297
$423
$283
2004
2005
2006
2007
2008
2009
Harvest Year

Merlot

Historical Trends in Production and Projections – Merlot

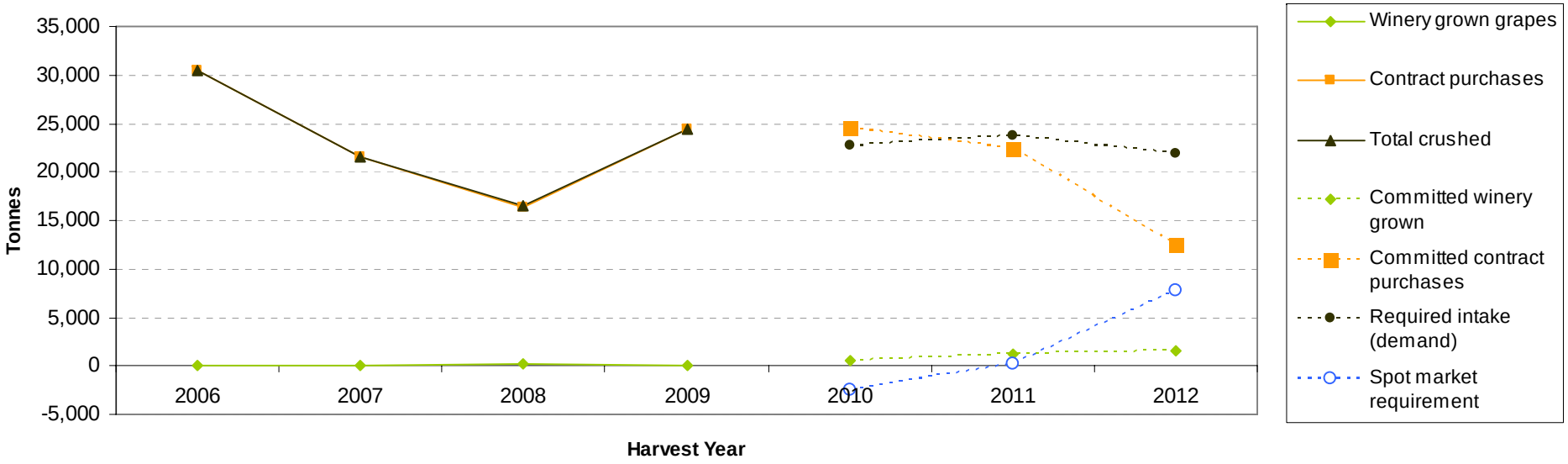


Historical Calculated Average Purchase Value – Merlot

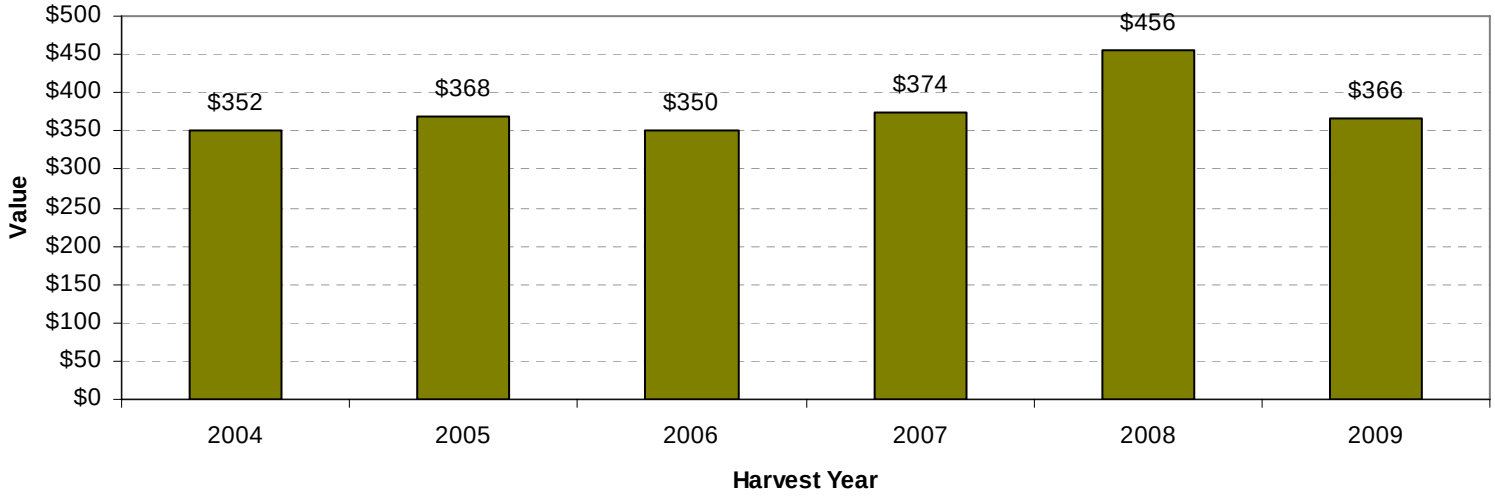


Muscat Gordo Blanco

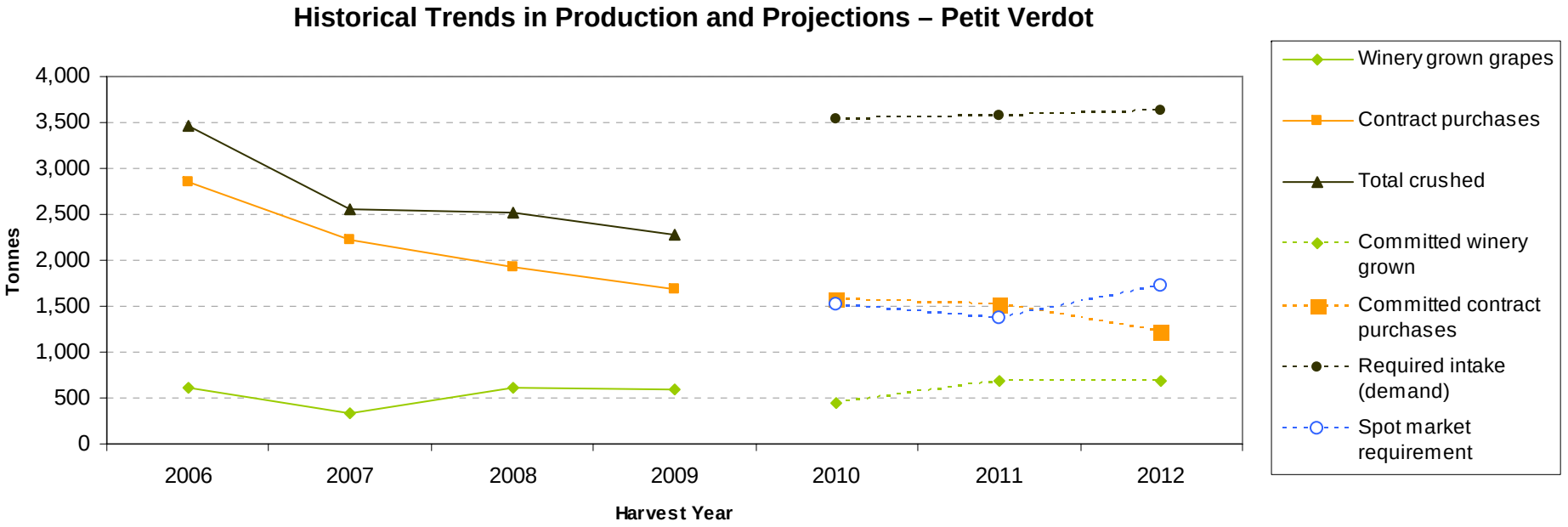
Historical Trends in Production and Projections – Muscat Gordo Blanco

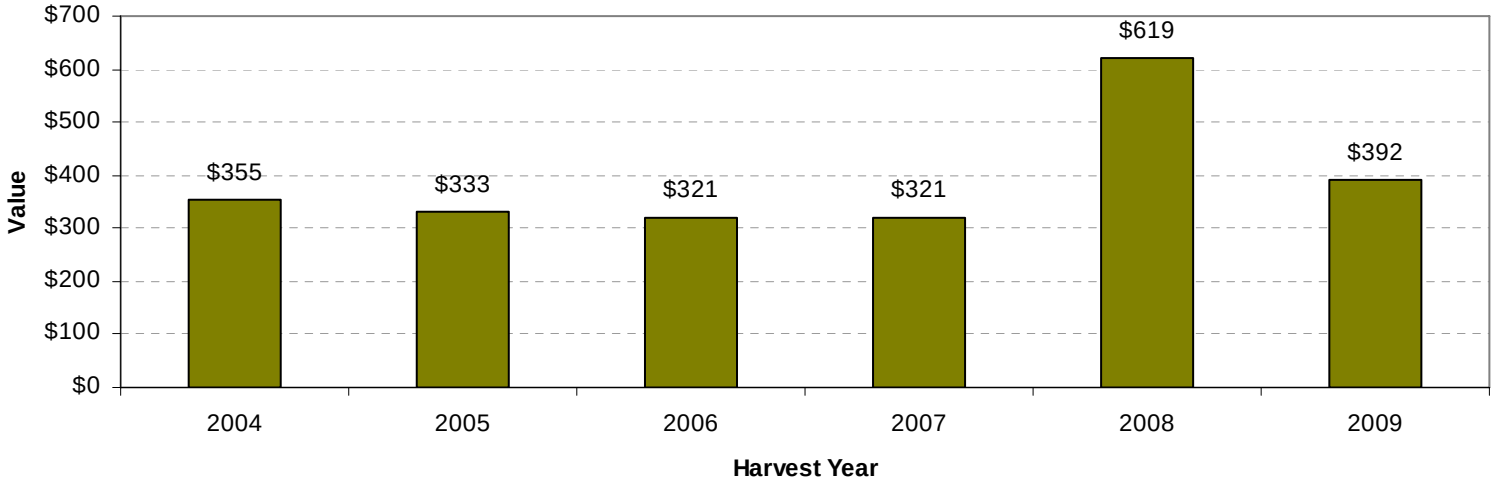


Historical Calculated Average Purchase Value – Muscat Gordo Blanco

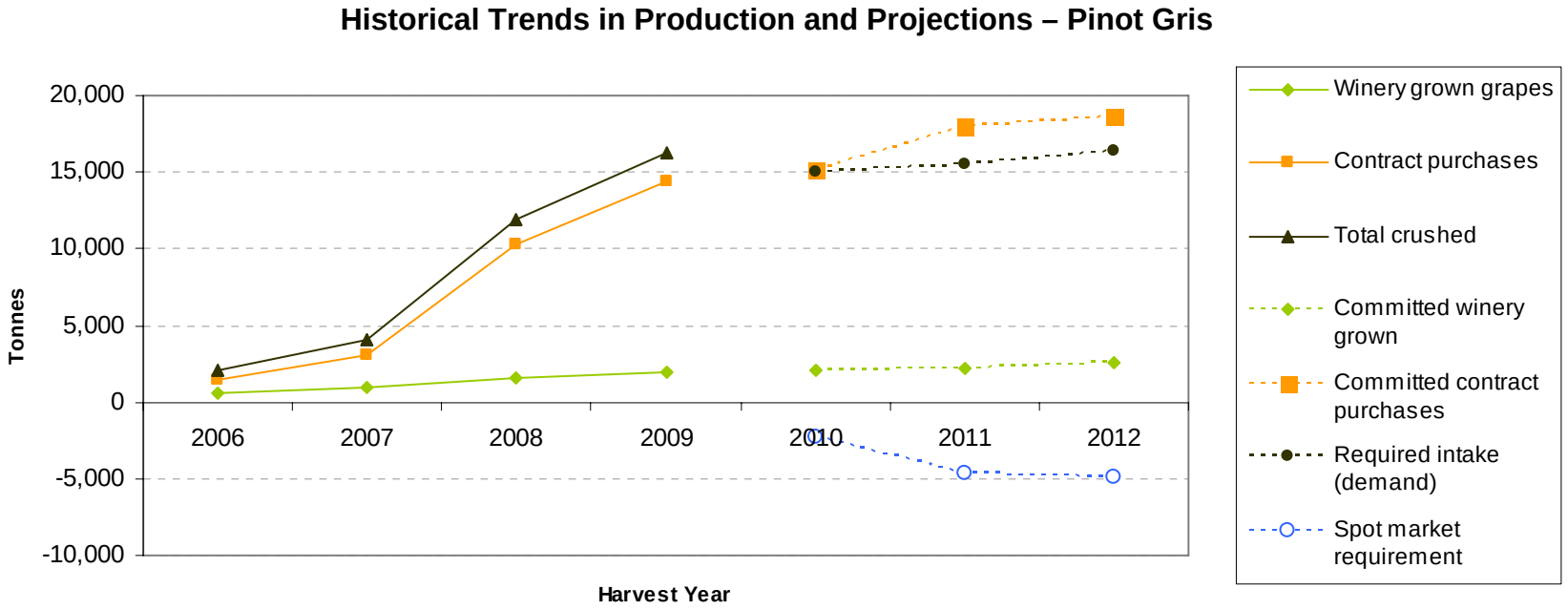


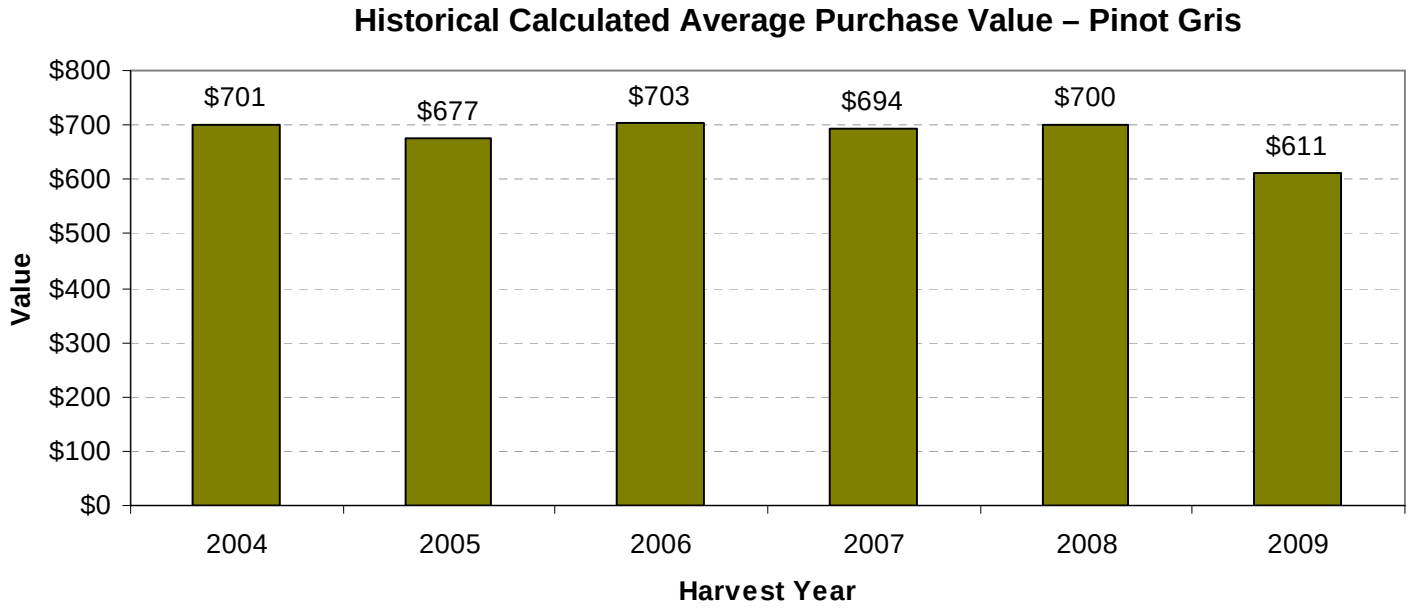
Petit Verdot



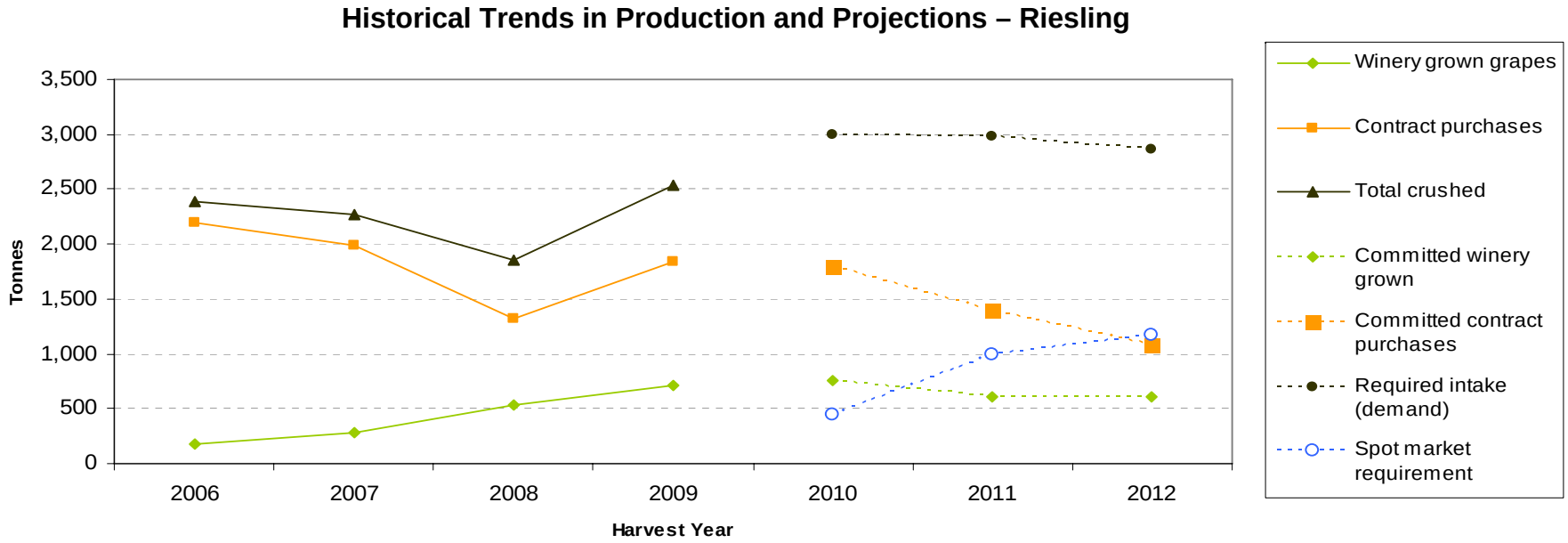


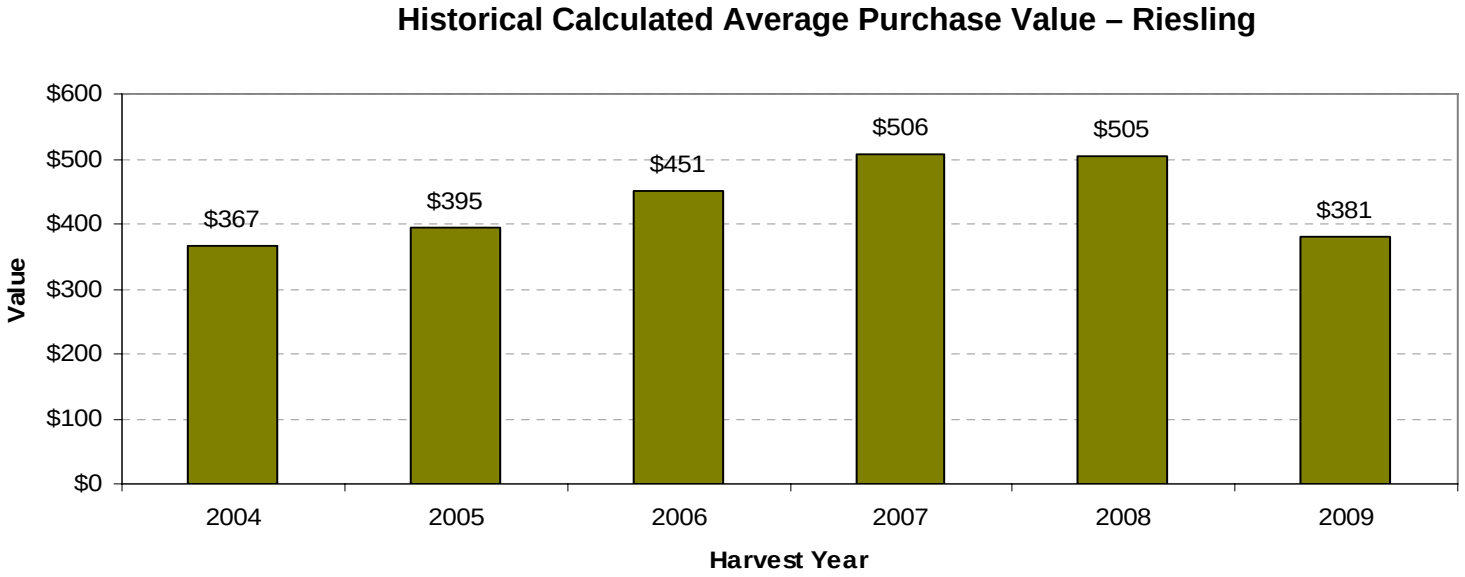
Pinot Gris


Historical Trends in Production and Projections – Pinot Gris
20,000
15,000
10,000
5,000
0
-5,000
-10,000
Tonnes
2006
2007
2008
2009
2010
2011
2012
Harvest Year
Winery grown grapes
Contract purchases
Total crushed
Committed winery grown
Committed contract purchases
Required intake (demand)
Spot market requirement

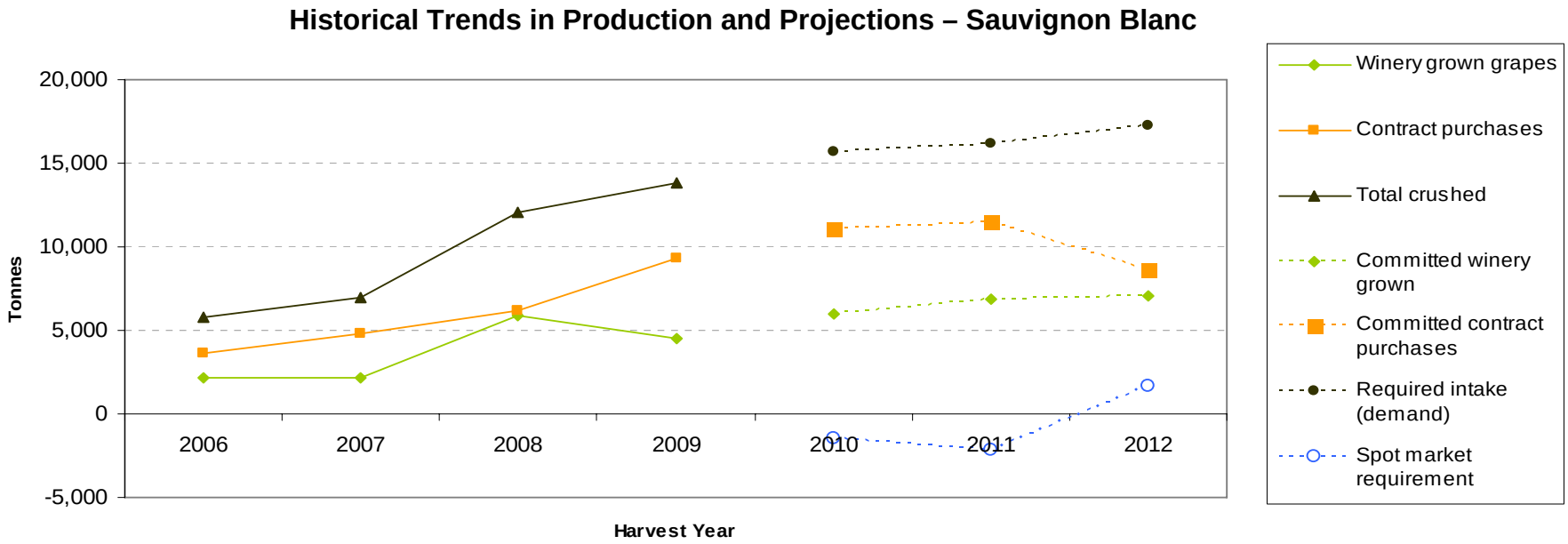

Historical Calculated Average Purchase Value – Pinot Gris
$800
$700
$600
$500
$400
$300
$200
$100
$0
Value
$701
$677
$703
$694
$700
$611
2004
2005
2006
2007
2008
2009
Harvest Year

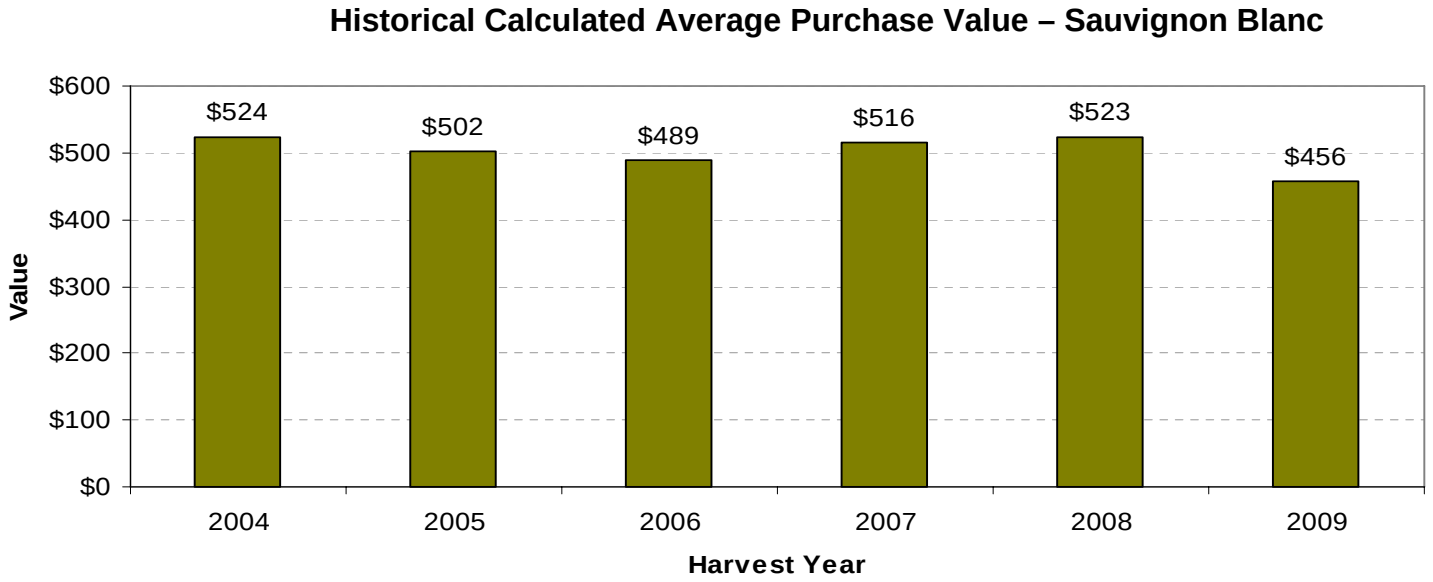
Riesling


Historical Trends in Production and Projections – Riesling
3,500
3,000
2,500
2,000
1,500
1,000
500
0
Tonnes
2006
2007
2008
2009
2010
2011
2012
Harvest Year
Winery grown grapes
Contract purchases
Total crushed
Committed winery grown
Committed contract purchases
Required intake (demand)
Spot market requirement

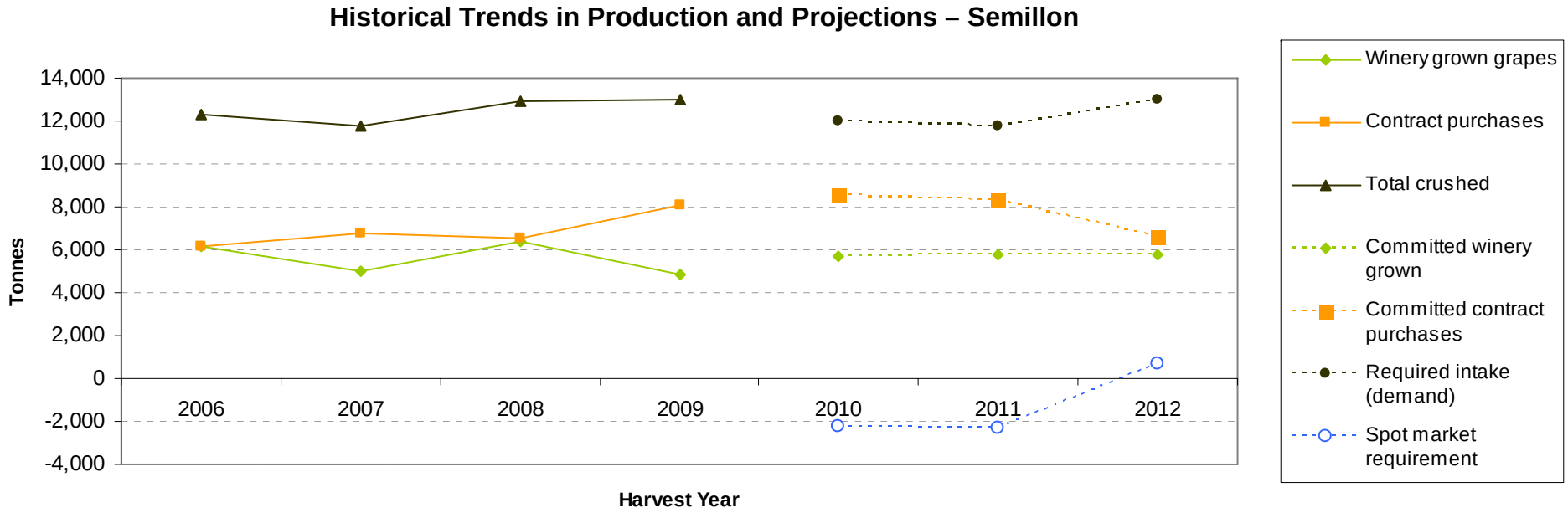

Historical Calculated Average Purchase Value – Riesling
$600
$500
$400
$300
$200
$100
$0
Value
$367
$395
$451
$506
$505
$381
2004
2005
2006
2007
2008
2009
Harvest Year

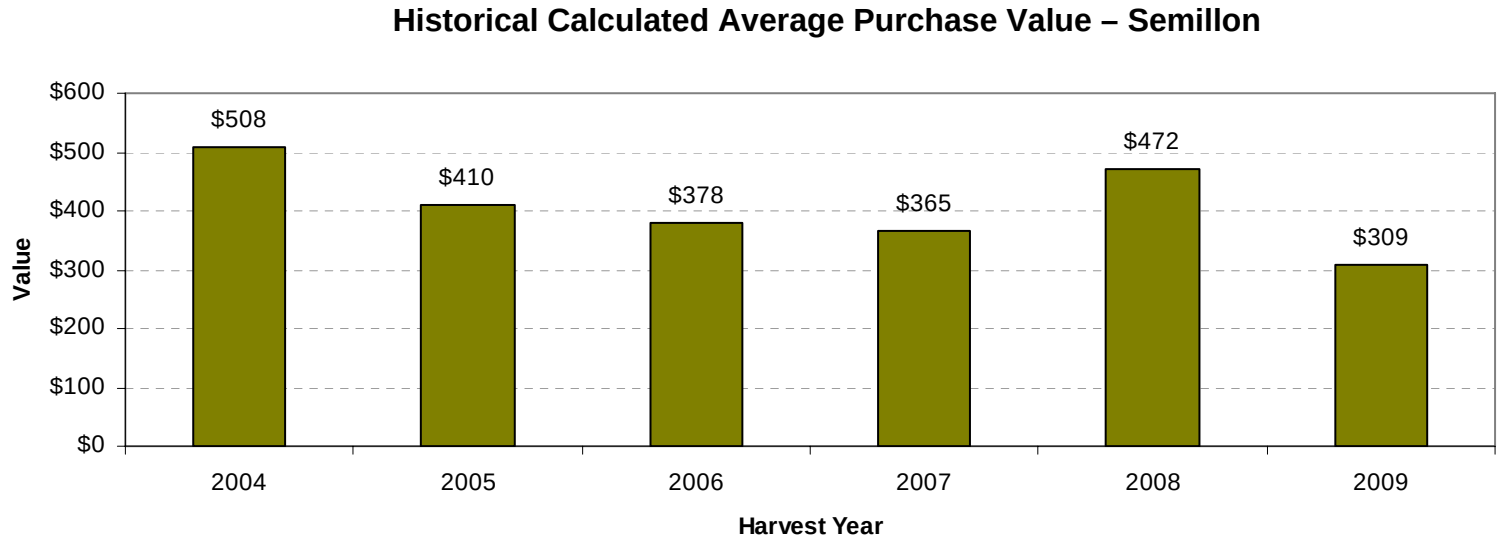
Sauvignon Blanc



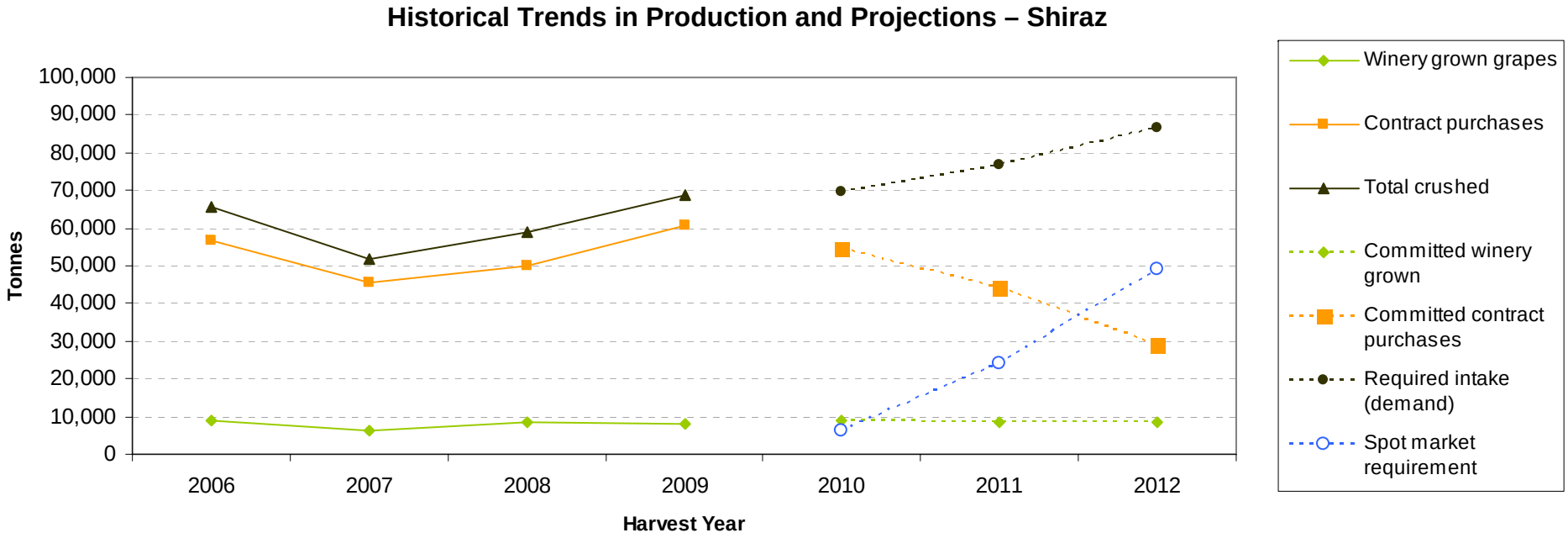


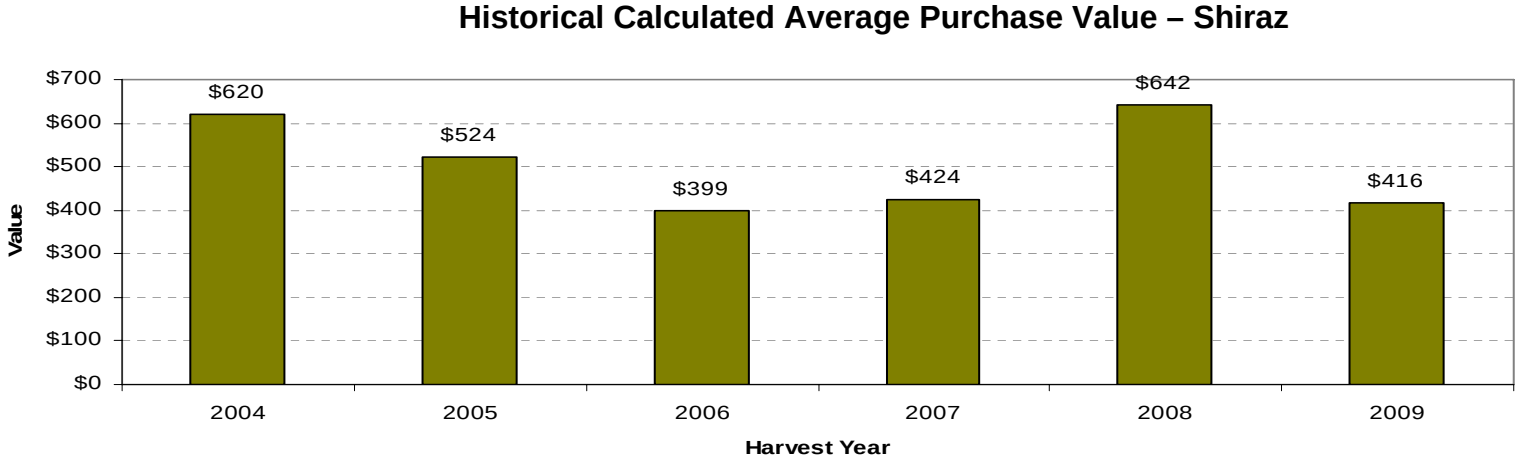
Semillon


Historical Trends in Production and Projections – Semillon
14,000
12,000
10,000
8,000
6,000
4,000
2,000
0
-2,000
-4,000
Tonnes
2006
2007
2008
2009
2010
2011
2012
Harvest Year
Winery grown grapes
Contract purchases
Total crushed
Committed winery grown
Committed contract purchases
Required intake (demand)
Spot market requirement

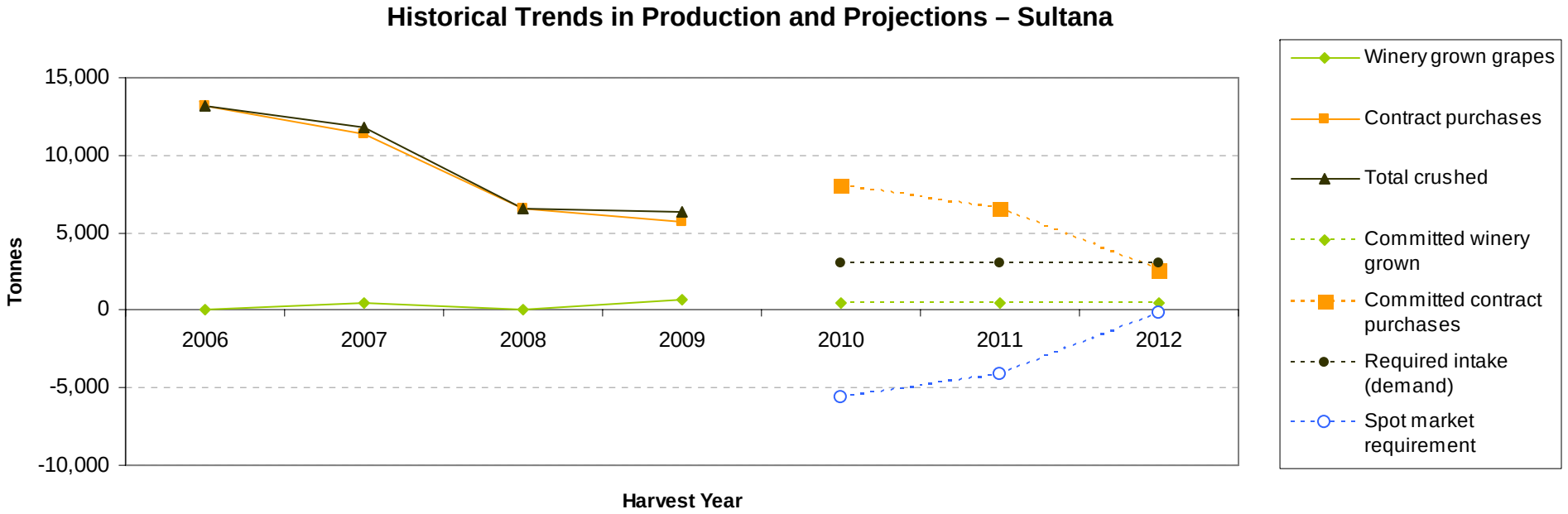

Historical Calculated Average Purchase Value – Semillon
$600
$500
$400
$300
$200
$100
$0
Value
$508
$410
$378
$365
$472
$309
2004
2005
2006
2007
2008
2009
Harvest Year

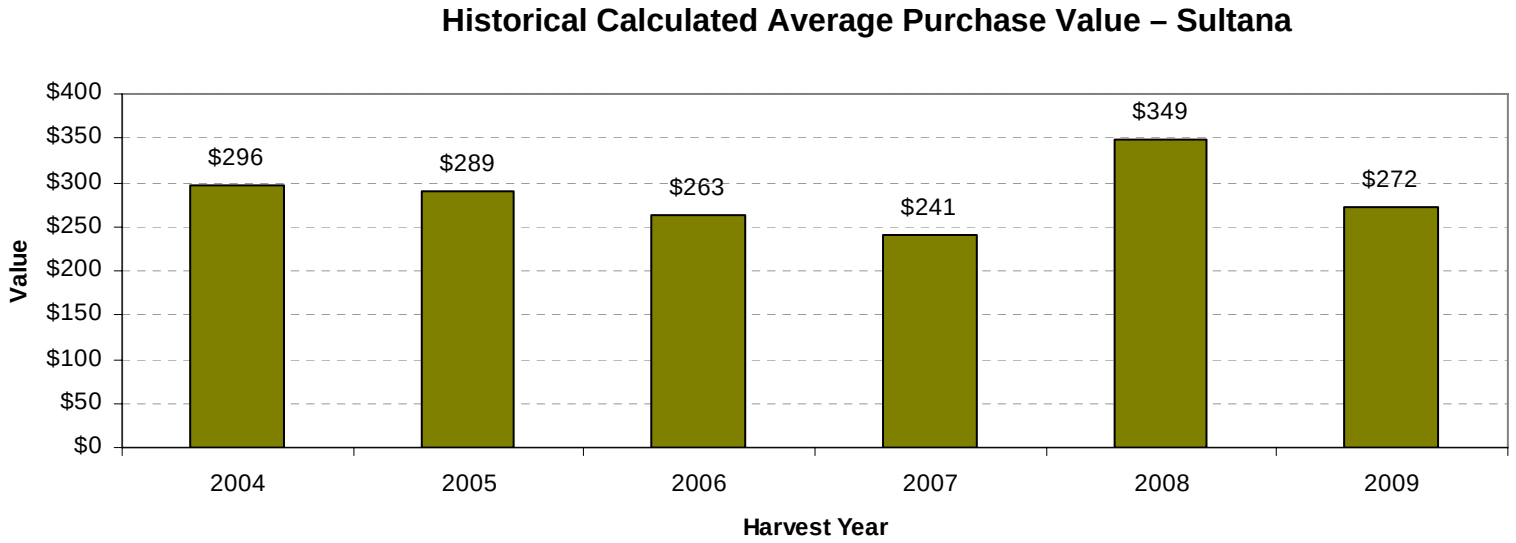
Shiraz


Historical Trends in Production and Projections – Shiraz
Tonnes
100,000
90,000
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
2006
2007
2008
2009
2010
2011
2012
Harvest Year
Winery grown grapes
Contract purchases
Total crushed
Committed winery grown
Committed contract purchases
Required intake (demand)
Spot market requirement


Historical Calculated Average Purchase Value – Shiraz
Value
$700
$600
$500
$400
$300
$200
$100
$0
$620
$524
$399
$424
$642
$416
2004
2005
2006
2007
2008
2009
Harvest Year

Sultana


Historical Trends in Production and Projections – Sultana
15,000
10,000
5,000
0
-5,000
-10,000
Tonnes
2006
2007
2008
2009
2010
2011
2012
Harvest Year
Winery grown grapes
Contract purchases
Total crushed
Committed winery grown
Committed contract purchases
Required intake (demand)
Spot market requirement


Historical Calculated Average Purchase Value – Sultana
$400
$350
$300
$250
$200
$150
$100
$50
$0
Value
$296
$289
$263
$241
$349
$272
2004
2005
2006
2007
2008
2009
Harvest Year

List of Wineries Returning Survey Forms

THANK YOU TO THE FOLLOWING WINERIES WHO RESPONDED TO THE 2009 SURVEY

Andrew Peace Wines
Australian Vintage
Berton Vineyards
Brown Brothers Milawa
Casella Wines Ltd
Constellation Wines Australia
De Bortoli Wines Pty Ltd
Deakin Estate
Dos Rios
Fosters Wine Estates
Kingston Estate Wines Pty Ltd
Mitchelton Wines
Neqtar Wines
Oak Dale Wines
Oak Valley Estate Boutique Winery
Orlando Wines
Pettavel Wines
Salena Estates
Tall Poppy Wines
Thatchi Wines
The Wine Group
Toorak Wines Pty Ltd
Trentham Estate
Tyrrell's Vineyrads
Vintage Traders
Warburn Estate
S Smith & Son
Zilzie Wines