The United Grower

May 2012

The newsletter of Wine Grape Growers Australia

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Wine Grape Growers Australia

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Harvest 2012: An early assessment

From reports received by WGGA, an early-April summary of the 2012 harvest, with the larger part of the national crop harvested, looks like the following:

- In what was generally a mild season, the major weather influences were cool with wet conditions in November 2011, which reduced fruitset plus heavy rain (and even flooding) from monsoon-driven rains that swept down from the north-west of the nation to the south-east. These rains predominantly bucketed on the east coast winegrowing regions of Australia and central New South Wales, with less extreme effects felt on the western edge of the rain's pathway, in a line from Mildura through to the Yarra Valley.
- Fortunes from the seasonal conditions tended to define three geographical zones with similar harvest outcomes; Western Australia, South Australia and the eastern states. WA had a hot, dry season with clean, disease-free conditions and exceptional quality. SA experienced generally mild conditions that were punctuated with occasional and manageable incidences of coolness and wet – leaving a season that was ideal for steady, full colour and flavour development. Similar conditions as in SA were experienced in the east, except for the wetness at the end of the red harvest – mildly in western Victoria and dramatically in central and eastern NSW. While devastating for the growers in these areas, the latter conditions only affected the final 15 per cent of the national harvest in rough terms.
- Tonnages per hectare were low in most areas, principally because of recovery from heavy crop loads last year and the coolness/wetness at fruitset in November 2011. In selected regions, last year's wetness also set back vine development this season, again lowering yields. These factors gave rise to the strong belief that the 2012 national tonnage would be low.
- Indicative pricing from early in the season suggested substantial rises in winegrape prices for the small share of higher-graded fruit while marginal-to-small rises were indicated for commodity to mid-grade fruit. Based on the low-yield expectations and losses in the eastern states at the end of the season, prices may have improved for some growers and available fruit.
- Combining the indicated 2012 winegrape price rises over the historical lows they had sunk to, with the expected lower 2012 yields, the average grower is again not expected to achieve costs of production per hectare in 2012 (see comments in the last *United Grower*).

The price movement was likely to be more about seasonal influences, rather than the more desirable, fundamental shift in supply-demand balance.

Your WGGA executive committee's views

VICTOR PATRICK (CHAIR)

victorpatrick@bigpond.com
Electoral zone: South Australia (voting member)

"Best quality vintage for years follows worst quality vintage for years? Modest increase in prices for some varieties in some regions. Lowest yields for years in many regions. Net result continued financial hardship for many growers in many regions."

JUSTIN JARRETT (DEPUTY CHAIR)

jarrettswines@bigpond.com
Electoral zone: New South Wales/Queensland (voting member)

"The great thing about finishing harvest is it gives you the opportunity to improve the next year."

BOB BELLATO

rvb4@bigpond.com
Electoral zone: New South Wales/Riverina (voting member)

On leave

KERRY SMART

ksmart@westnet.com.au
Electoral zone: Greater Western Australia (voting member)

"After nearly a decade of drought much of the eastern states have been hit by two years of floods. Climate change is here."

SIMON BERRY

simon@berry2wine.com.au
Electoral zone: South Australia (voting member)

"Logistically and disease-wise a very good vintage, winemakers pleased with fruit but in short supply in most SA districts. Still only seen as a short-term aberration in supply-demand balance and placed industry under further financial constraint through low yields and higher overheads in winemaking."

KYM LUDVIGSEN

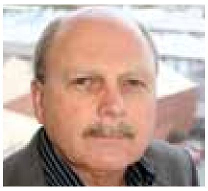
ludvigsn@vic.chariot.net.au
Electoral zone: Greater Victoria/Tasmania (voting member)

"These are interesting times for the wine industry. We need to ensure WGGA is prepared to meet any and all challenges in a positive and progressive manner."

DENNIS MILLS

mvw@murrayvalleywinegrapes.com.au
Electoral zone: Murray Valley (voting member)

"2012 was a better season than 2011 – crop levels mixed with variable yields, overall quality very good, modest price rises for major varieties – hopefully heading towards a more viable future."



LAWRIE STANFORD (EXECUTIVE DIRECTOR)

lawrie.stanford@wgga.com.au (non-voting member)

"It is good to see some general buoyancy in the industry – it will be interesting to see if the reasons are seasonal in nature or the turn in the cycle we hope for. Harvest done, we now move into the season of renewing strategic thinking."

As discussed in the last newsletter, while indications of upward winegrape price movements in 2012 gave some hope to growers, the price movement was likely to be more about seasonal influences, rather than the more desirable, fundamental shift in supply-demand balance. In other words, oversupply may not be over.

Several weeks prior to preparing this article, WGGA posted a website report on an early March phone survey, which suggested a 1.4 million tonne harvest. Advisedly, this estimate pointed out the difficulties of predicting the harvest size, that the methodology was 'not ideal' and that there was some 'upside potential' to the estimate.

By the time this report is published in *The United Grower*, the result may be clearer, but there are emerging signals that the result will be higher than 1.4 million tonnes, and possibly significantly higher.

If the 2012 harvest does shift upwards from a 1.4 million tonne estimate based on low yields (and let's not forget how incredulous it seemed to contemplate a 1.6 million tonne crop last year), then it may be that production levels of somewhere around 1.6 to 1.7 million tonnes may be as good as it gets for supply adjustment in the industry.

The implications of this are elaborated on further in the executive director's opinion piece in this newsletter.

It is noted that the first 'official' estimate of the national harvest tonnage will come from the WFA Vintage Report which is being prepared for release in July.

National organisation merger talks continue

A steering committee with representatives of WGGA, the Winemakers' Federation of Australia (WFA), the Grape and Wine Research and Development Corporation (GWDRC), the Wine Australia Corporation (WAC) and the Department of Agriculture, Fisheries and Forestry (DAFF) continues to plan for merging the two industry statutory service bodies, the GWRDC and WAC. The tasks in hand are the industry consultation process and on the basis of this, preparing a submission to the Minister on the wine sector's wishes.

A document with details of the proposal is being finalised and will be circulated to all growers. The means for circulating it to growers will be through regional associations, so it may have arrived already by the time this article reaches you. The circulated document will underpin visits by key WGGA and WFA personnel to as many regions as possible to discuss and receive feedback that can be presented to the Minister. There will also be a facility to provide direct feedback. The visits are planned for May and June 2012.

Based on concerns raised with WGGA so far, it is worth repeating some key points made in the last newsletter.

First, the primary benefit of the merger is that services provided to industry through one body will provide better coordination and alignment of the programs currently provided by the two separate bodies, greater responsiveness to emerging needs and a stronger strategic focus for the industry as a whole.

The process is, nevertheless, not one of 'blending' the two sets of functions so they are indistinguishable but rather, a simple process of making two bodies into one that houses the two sets of functions. For example, in the one body, the current legislated definition of research and development will be enshrined in the new legislation, thereby quarantining R&D funds for R&D under the same terms as present. In addition, the existing levies and levy rates will remain unchanged.

Your opinions will matter – look out for the opportunity to comment to ensure the Minister is in no doubt what the industry wants.

GWRDC 2012-2017 Five Year Plan is good news for growers

After a comprehensive consultation process with relevant stakeholders, the GWRDC 2012-2017 Five Year Plan has been devised and it sits with the Minister for approval. In order to get the 2012-13 research effort under way, the GWRDC invited researchers and industry to a briefing on the plan in late March 2012. Since, at the time of preparing this article in early April, it was still subject to Ministerial sign-off, full details were not available to relate here. It is, nevertheless, worth conveying some key messages that are positives for the growing community.

The GWRDC has identified four high-priority areas in which research is intended to commence in the first half of 2012-13 and an additional six priorities for which a selection process will get firmly under way as the high priority projects commence.

The high priority areas for research are:

- adoption strategies
- biosecurity
- consumer insights, and
- objective measures of quality.

Three of these high priorities respond directly to those expressed by growers through the consultations that WGGA was involved in. Their priority listing by the GWRDC is welcomed.

The GWRDC process for initiating research in these areas is to now invite researchers and industry to workshops in which discussion will be encouraged to identify opportunities and potential research projects that will then be the subject of expressions of interest for funding. By the time this article is published, two of these workshops will have already occurred.

A targeted GWRDC approach to calls for research applications will then focus on the additional six priorities:

- climate change adaptability
- improving spray efficacy
- market access
- packaging and transport
- pest and disease management
- vine balance and yield variability.

This collection of topics also has the potential to substantially support growing but, of course, the final size of the harvest will determine how many dollars will be available for them.

A sobering aspect to the GWRDC presentation was that after meeting commitments to existing projects, and subject to the size of the 2012 harvest, there would be a modest amount of funds available for disbursement in 2012-13.

Harvest 2012: Implications and questions

In all of the time the author of this article has had anything to do with estimating the national winegrape crop size, one thing has been constant – the harvest is invariably bigger than forecast during harvest. It looks like this could happen again in 2012.

If so, it might be time to acknowledge that higher-than-desirable production levels may be here to stay. On these terms, supply-demand balance will not come about through supply-adjustment but, rather, through demand adjustment (growth) catching up to supply. The implication is that achieving balance will be on a longer timeline.

While recognising that an average crop used to be 1.85 million tonnes (or about 2.0 to 2.1 million tonnes in exceptional yielding years), there has been some supply adjustment. The official statistics record around 10,000 hectares of net removals between spring 2007 and 2009 and about 6% of the national vineyard at its peak. Nevertheless, this is not generally believed to be enough in itself to achieve balance of supply with current sustainable sales.

It might be time to acknowledge that higher-than-desirable production levels may be here to stay.

Previous commentary from WGGA has highlighted that production and sales at the higher levels that may be a prospect this year, relies on loss-making grape sales. The driver for this is the need wine producers have to maintain processing throughput and, in turn, their unit costs and hence overall costs. Moreover, to maintain sales into generally lower-cost-of-production global market, especially with the punishing Australian dollar, sales rely on very cheap grapes.

If higher than desirable production levels are a reality, the pertinent question for growers is whether they can afford to continue selling into the price-driven grape market that this wine market relies on.

Very low grower costs are necessary to make it work for the grower. If the required low costs of winegrape production are not achievable, the only alternative is to boost returns on the fruit by producing fruit with qualities other than its low cost, selling to a wine producer that is interested in these qualities and willing to respect the grower as a partner who can consistently produce them.

If higher production levels are here to stay until demand catches up, growers will need to decide which model they are in – selling on the basis of being competitive as a low-cost winegrape producer or producing, and promoting, qualities for which wine producers are willing to pay higher prices.

LAWRIE STANFORD
Executive Director

What a difference a year makes – or does it?

Optimism in 2010 to challenging and difficult in 2011 followed by "best quality fruit in a decade for 2012".

While it is early days and probably too early to be completely objective, recent comments regarding the 2012 vintage are optimistic from a quality point of view. Comments I've read include: "all regions reporting a high quality vintage", "great vintage for SA", "among the best in 40 years", "grape prices rebounding". There's also been some confident headlines, such as 'Corker of a year for hard hit grapegrowers' and 'Growers toasting a vintage season'.

This is all positive news and welcome after last season. A relatively small, high quality vintage will no doubt be a positive for the wine industry.

While indicative prices have increased in the major inland regions and for some varieties in some regions in the cooler temperate areas, many have remained at last year's levels.Yields in most premium regions are 30-40% below average.

The reality for many grapegrowers is that the combination of 'in field' quality assessments similar to previous seasons, similar indicative prices and low yields in most premium regions will still not be enough to return many growers to profitability.

Will the final classifications result in above average grades which, in turn, will be reflected in above average grape prices?

Some regions have also suffered significant losses due to inclement weather and floods. Yield is often (almost always) seen as a quality factor, with lower yields associated with wines with more concentrated flavours. The concept of 'vine balance' is sometimes lost.

Objective measurements of winegrape quality to determine harvest time, to allocate grapes to winery process streams and to determine quality based payments to growers require significant time and effort during the busy vintage period. They can be a source of frustration and conflict unless they are well-conceived and communicated effectively. They also sometimes clash with the desire to match inventory with demand, time constraints, staff constraints and available fermentation space in what appear to be ever more congested vintages.

The Australian wine industry has long held a lofty ambition to develop measures of vine characteristics and grape composition that are predictive of wine quality. This ambition is theoretically possible but is it currently feasible?

Vintage 2012 could be a test. Initial comments suggest an outstanding year for quality. Will the final classifications result in above average grades which, in turn, will be reflected in above average grape prices?

I guess only time and the 2012 Winegrape Purchases: Price Dispersion Report will provide the answer.

BRUNO ALTIN

Occupation:
Farmer/winegrape grower.

Vineyards:
Nericon, in the Riverina. (North of Griffith) 133ha.

Varieties of Interest:
We grow a large range of different varieties on our vineyard. My favourites are white Frontenac, Gewürztraminer, and Merlot.

Destination of fruit:
All our fruit goes to the McWilliams site at Hanwood.

Brief history of career in industry to date:
I've been working on the family farm with my dad Sergio for as long as I can remember. We've slowly grown the family business from our original 33ha farm to about 133ha over the past twelve years. I am married with a child on the way, hopefully we can keep growing the family farm into the future for the next generation. I joined the Riverina Winegrapes Marketing Board in early 2011 at the age of 25, making me the youngest board member.

How do you view the oversupply issue:
I personally don't see a grape glut as the biggest problem the industry has to battle. Many young farmers have left the land in favour of the mines or the city where income is more reliable, and hours more predictable. Most have no intentions of returning to the farm. We are in the process of watching a generation of first hand knowledge disappear. Some of the practical aspects of farming can't be taught at university, and even if they could, farms and machinery are unaffordable for most people with no farming background.

Where to from here:
Many people view farming as a lifestyle rather than a business. The farming lifestyle cannot be maintained without a successful business plan, and a successful business cannot exist without happy customers. The latter goes beyond just choosing our wines from the supermarket shelves to customers requesting our wines when they can't find them. Growers and winemakers need to work together to promote our products, because neither of us can exist or be successful without the other.

New face on the team

If you call the WGGA office, you may catch Nikki Zorzi, who joined us in early March and will complement Kelly Bonser in running the office.
Nikki is assisting us bring our accounts in-house and will back this up with improving our contact with growers, for sending and receiving information, through a contact database and the internet.
Nikki is a part-timer, as Kelly is, but their respective times in the office will allow us to provide a point of contact for every day of the week. We hope this will provide you better access to us.
Nikki's time with WGGA has been approved until the end of the financial year but we are hopeful the upcoming year's finances will allow the arrangement to continue.
Nikki has worked in the wine sector before. In addition to her key experience in accounts, her experience and talent also encompass a wider range of office activity, including communications, personnel work and promotions.
We are sure you will find her helpful if you call and we look forward to your assistance in making the grower projects she will be working on a success.
A reminder that our contact information for Kelly and Nikki is 08 8133 4400 or email: info@wgga.com.au

Business planning and budgeting key in tough years

In its UPDATE newsletter of April 2011 (Issue 4), the Rural Financial Counselling Service SA published a case study, recounting the situation faced by a grapegrowing family in the Lower Murray region of South Australia. WGGA believes that this case study illustrates some important ideas that might be helpful for other growers. Our interpretation of the article follows.

Like many growers, these growers experienced difficult times in the mid-2000s. Their mixed cereal and vineyard property was struggling due to a combination of high debt repayments, water restrictions, poor water quality and falling grape prices.

Because of their precarious financial situation, the growers worked with a rural financial counsellor who encouraged them to apply a more calculated approach to their business. In particular, a long-term plan was devised and it was committed to paper. This allowed them to make more informed business decisions and brought their bank manager onside. The bank manager was pleased to see evidence-based decision-making. The planning gave the bank assurance that the business had a plan and direction that identified the potential to return to profitability on a defined timeline. The plan included contingencies and responses to the bad times. They also made time to set up a method for tracking expenses accurately, which helped when hard business decisions had to be made to find cost savings.

The 2010 season saw a return to profitability for the growers through their other crops, while their grape sales were in a 'maintenance mode'. Making business decisions based on this planning gave them optimism about the future and they now plan as a matter of course for the years ahead – seeing planning, budgeting and controlling expenses as vital to long-term success.

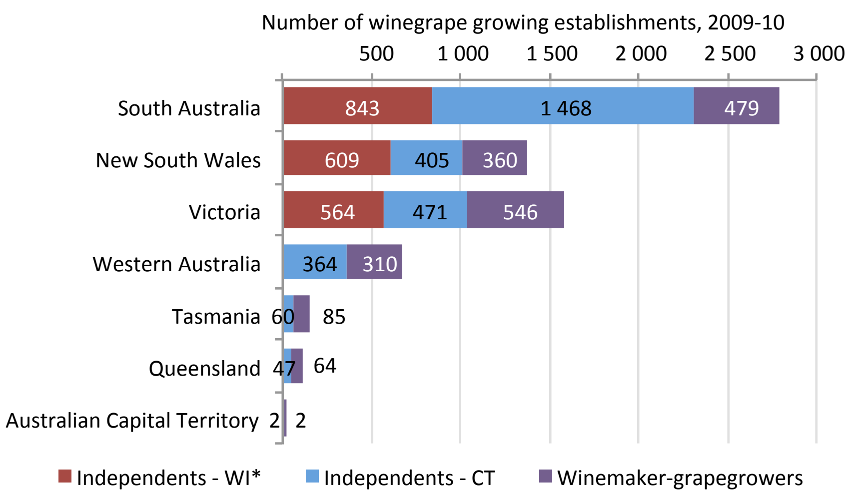
By making a commitment to improving the financial management of their business during lean years, the growers were able to carry on, as well as being better positioned to capitalise on the better years.

WGGA advocates the positives of this experience. A financial plan helps with critical decision-making, gains the confidence and support of your lender, and even if only because you are being proactive, gives some direction and hope to you personally. The assistance of a professional such as the Rural Financial counsellors can give you the skills to be independent in the future and resilient in bad times.

First official data on winegrape growers by type

A special WGGA data request from the Australian Bureau of Statistics allows the categorisation of winegrape growers in 2009-10 by type (independent growers versus winemaker growers), location, area of vineyard holding and tonnages. Subject to the data still reflecting today's situation, it shows that growers can be categorised by state and type as follows.

- Roughly 60 per cent of Australian winegrape growers are independent growers. Nearly 60% of these hail from cooler-temperate regions.
- Independent growers outweigh winemaker growers by number in SA, NSW, Victoria and WA while the opposite is true in Tasmania, Queensland and the ACT.
- SA, NSW and Victoria account for the larger share of the number of independent growers, at 90%, with another 8% in WA.
- In a comparison of the states, independent growers in SA represent the largest share of the total numbers of growers in a state, at 83%, with nearly two-thirds of these located in the cooler-temperate regions.
- In contrast, the smallest share of independents out of the total number of growers in a state, is found in Tasmania – at a 41% share.
- While NSW and Victoria have similar numbers of independent growers (1014 and 1035 respectively), a larger share of total growers in NSW are independents, at 74% (compared with Victoria's 65%) with 60% of NSW's independents located in NSW warm inland districts.
- Of Victoria's nearly two-thirds independent growers, roughly half are located in the warm inland regions and half in cooler-temperate regions.
- Western Australian winegrape growers slightly favour independents in number, at 54%.



Source: ABS, special data request commissioned by WGGA, 2012 *'WI' means Warm Inland - SA being Riverland, Lower Murray Other; NSW being Riverina, Murray Darling (NSW), Swan Hill (NSW), Perricoota, Big Rivers Other; Victoria being Murray Darling (Vic), Swan Hill (Vic), NW Victoria Other. 'CT' means Cooler-Temperate (rest of Australia outside of the warm inland regions)

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SA Grapegrowers vote to continue industry fund

Peter Hackworth, executive officer of the Wine Grape Council of South Australia has previoulsly reported for *The United Grower*, on the consultations for the renewal of the SA Grape Growers Industry Fund (SAGGIF). The consultations and a ballot to renew the fund was conducted earlier this year and Peter has provided the following update:

A ballot conducted of SA's vineyard owners has shown strong support for the continuation of the SAGGIF. The fund is a $1 per tonne levy collected on income from grapes grown in South Australia.

WGCSA took the unique step of undertaking a postal ballot of all its members on the future of the fund. This was supported by 11 regional briefings to give growers the opportunity to ask questions of, and make suggestions directly to, council members.

WGCSA chairman and Adelaide Hills grapegrower Simon Berry said he was particularly pleased that two-thirds of the ballot respondents voted for the fund to continue.

"This is a very positive result at a time of significant and ongoing downturn," Berry said with the future of the fund clear for the next five years, the challenge now was to continue to develop and deliver services that addressed the needs of SA grapegrowers," Simon said. "The WGCSA is run by grapegrowers for grapegrowers, we know how tough times are and while the Australian dollar remains at record levels, every grower faces the challenge of survival until things improve."

WGCSA will shortly commence a review of the organisation. The review will look at council membership and project priorities. One key issue to be examined is how the levy is collected. Some Riverland growers are concerned that the current system sees them paying significantly more than those in lower-yielding regions. Options such as a percentage of farmgate value or a per hectare levy will be considered in the review.

Currently, half the funds collected are provided to WGGA to address national viticultural issues.

Keeping in touch with growers

Regional associations provide WGGA with a vital link to Australia's winegrape growers, enabling us to stay in touch with grower issues and opinions, as well as being able to pass on important information. It is, therefore, important that our records on regional associations are up-to-date.

We are currently updating our records. Each regional association in Australia will be receiving an email to confirm that the details we have are still correct.

As well as contact details, we are interested in knowing the grower/winemaker profile of each association's membership. This helps us understand how many growers we are reaching, and it is important information for policy development and strategic resourcing.

If you are the contact person for a regional association, we will be grateful for your assistance in looking out for an email,asking you to review the information contained and advising us of any changes that need to be made.

There are but a few bits of information for review. If you have already done this – many thanks. Alternatively, if you are not aware of having received the email, please let us know.

Any questions can be referred to Nikki in our office on 8133 4402 or on email: info@wgga.com.au.

Viticulture training – more options for independent grapegrowers

Improvements are being made to TAFE-level qualifications available to independent grapegrowers in Production Horticulture and Certificate in Food Processing (Viticulture) qualifications and new, higher-level qualifications for vineyard supervisors and managers.

This is being done through a project funded by AgriFood Skills Australia to modify existing Certificates II and III in Production Horticulture and to develop new nationally endorsed qualifications in viticulture at Certificate IV and Diploma level.

One major benefit from this project will be that the delivery of viticulture qualifications may attract government funding – making them more accessible to independent grapegrowers.

Winegrape growers are represented by WGGA on a Reference Group established to provide industry advice.

If growers have any comments or suggestions regarding training in viticulture or the proposed changes, you can contact Sandy Hathaway (WGGA representative via info@wgga.com.au) or directly to the project consultant, Tony Dodson tonydodson@adam.com.au.

The proposed draft qualifications are currently available to be viewed or downloaded on the AgriFood Skills Australia website: www.agrifoodskills.site-ym.com.

New numbers: The Wine Grape Growers Australia has new contact details. Its new phone numbers are: Ph: (08) 8133 4400 and Fax: (08) 8133 4466. The new office location is Level 1, Industry House, National Wine Centre, Corner Botantic and Hackney Roads, Adelaide. The postal address is Po Box 950, Kent Town, SA 5071.

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Inside the May 2012 issue, with its special focus on small-to-medium enterprises, just a few of the must-read news and grapegrowing items are:

- Quality outweighs quantity in vintage 2012
- Regional Round-up: Western Australia
- Letter to the editor: MIS has its place
- The light touch to wine quality
- Recovery of grapevines from fire damage
- New legislation for securing rights over fruit
- Composting onsite for economic and environmental gains
- New grape training system for machine pruning.

And in winemaking, sales & marketing and business & technology there's:

- Best of the boutique: Passion and patience
- The addition of bentonite at different stages
- Is there too much copper in your wine?
- Jeni Port: Foreign love affair
- Author reveals first steps to marketing magic
- Wine business philosophy

This issue also includes the regular features: local and international news briefs, regional round-up, MyView, calendar of events and Marketplace classifieds.

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