

IRRIGATORS WELCOME ALP COMMITMENT TO "RECOVER THE GAP"



Irrigators have welcomed an ALP commitment to "recover the gap" between current diversions in the Murray Darling Basin and proposed new "sustainable diversion limits" (SDLs) but warned this should not be seen as acceptance of any recommendations contained in the forthcoming Basin Plan.

The National Irrigators' Council said the position of the ALP to buy back from willing sellers any water needed to meet the new SDLs was a step in the right direction and an endorsement of NIC policy.

NIC CEO Danny O'Brien said the policy was recognition of irrigators' property rights and that if governments want water for the environment or any other purpose, they should buy it.

"Our first priority for the election is the retention of the current \$5.8 billion for infrastructure efficiency works and the \$3.1 billion allocated for buyback. We welcome the ALP's commitment to these programs and to go further and provide more funds if necessary to continue purchases from willing sellers.

"We expect the focus to remain on infrastructure works in the short to medium term. A government commitment to recover the gap ensures that irrigators who want to stay in the industry and keep producing food and fibre for the nation can do so with no or limited impact on the reliability of their entitlements. It will also allow those

irrigators who want to get out of the industry to do so with dignity.

"Buying out the gap will be a lot cleaner and simpler for both irrigators and taxpayers than a complex compensation formula. We now call on the Coalition to match the commitment."

However Mr O'Brien said neither the commitment nor the NIC's support of it should be seen as acceptance of whatever is proposed in the Basin Plan.

"We remain very concerned that the Basin Plan proposal will strip significant amounts of water from Basin communities, costing jobs, driving up food prices and forcing families off farms that have been held for generations.

"We must have balance in the Basin Plan and if that is not delivered by the MDBA then governments need to be prepared to step in to get it right. All Australians will suffer if the balance between the needs of the environment and those of food and fibre producers and rural communities isn't right."

Mr O'Brien was cautious on proposals to change arrangements relating to the Menindee Lakes and said the NIC would await further details before commenting.

"We would welcome any measures to reduce losses at Menindee but want to ensure irrigators are not disadvantaged by any changes to the arrangements surrounding the storages there."

Media Contact: (02) 6273 3637 or 0438 130 445

Danny O'Brien CEO - National Irrigators' Council

IMPORTANT NOTICES

HACCP Audits: Reminder to Growers that if you are using the Wine Grapes Marketing Board HACCP system and have not made an appointment to be audited you should contact the Development Staff - Kristy Bartrop (Industry Development Officer) and John-Ross Wood (Technical Officer) to book your appointment.

Association Meetings: The next round of Association meetings will be the Yenda and Hanwood Annual General Meetings (to be held in September). These AGM's are normally advertised in the local newspaper. Growers wishing to get a reminder SMS in relation to these meetings and other important Board information are advised to contact the Board office and supply your mobile details.

WINE GRAPES MARKETING BOARD - proudly serving winegrape producers since 1933
182 Yambil Street (PO Box 385) GRIFFITH NSW 2680

P: (02) 6962 3944 F: (02) 6962 6103 E: board@wgmb.net.au W: www.wgmb.net.au Office Hours: 8:30am - 5:00pm Mon - Fri

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2011 SEASON DOES NOT HOLD PROMISE

Meetings held by the Wine Grapes Marketing Board with many of the regions wineries indicate that market conditions for winegrapes have not improved in recent months and improvement is not likely to occur due to continuing international competition and oversupply.

A lighter yield across Australia in 2010 did not see the reductions in stored volume required by the industry to bring stability into the market place while volatility in the dollar against our major markets has not led to any real improvements in trading conditions for regional wineries.

Production is one aspect associated with getting the balance right to allow stocks of wine to be more manageable to enable the industry to move forward. In the three major inland regions production to, Riverland (333KT), Murray Valley (328KT) and Riverina (260KT). These combined still produced 921KT - 60 percent of the nations crush in 2010.

The Board held individual meetings with wineries to discuss their market issues and to raise awareness of the water concerns of growers in the region.

Many wineries have seen a slowing in the markets based on the global financial crisis and the increasing level of competition coming from our major new world competitors, Chile, Argentina and South Africa. In these countries the costs of production are lower but the level of skills and wine quality have steadily been increasing over recent years making their offer more acceptable.

Consumers in our major markets are keen to pick up a bargain in terms of price per bottle and the Australian industry can no longer sustain this type of marketing. It is a short term strategy to continue to sell for less than it costs to produce as the only winner is the consumer and it cannot last indefinitely.

Looking for a Home?

Many of the wineries that the Board spoke to are not seeking to take extra winegrapes but some advised that if conditions in the market improved or opportunities arose they would seek to pick up some extra tonnes.

Some wineries will be motivated by the variety on offer and its relationship to their current market requirements.

The lack of demand for some varieties therefore has the potential to leave a volume of winegrapes on the open

market in this region greater than in 2010. Such increases in volume can impact on the price offers by wineries as has occurred in the past. Growers under these circumstances may be forced to sell at returns well below the cost of production.

The Board is again collecting information from growers that do not have a home for their production in 2011. It will assist the Board and the region in knowing the extent of the problem in this region and enable wineries that may be seeking specific varieties to source the details of these growers.

It is important to note that conditions could easily change quite rapidly if economic forces alter and/or seasonal conditions impact on the size of the national crush. Industry leaders are suggesting however that the likelihood of a large regional crush in 2011 is high given the levels of rainfall and the lighter than expected crush in 2010. It is likely that the regions wineries will again look to cap production intake from growers. The Board will again try and lobby the regional wineries to ensure that prices on a per hectare basis are sustainable. In the past years the returns to growers have dropped to levels that are no longer sustainable for the industry and more growers than ever are being impacted by diminishing farm gate returns.

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ALCOHOL TAX RISE WOULD IMPACT ON RIVERINA INDUSTRY

The Henry Review into Australia's tax system is understood to have recommended changes will occur in way that alcohol is taxed. These changes as discussed in previous editions would effectively increase the price of lower priced wines especially wine casks.

The current federal government declined to adopt any of these changes instead advising in a press release that as the industry was currently going through a major restructure it would not at this time make changes to the taxation system.

However the medical fraternity have continued to push for change by highlighting the devastating effects that alcohol has on people when it is abused by individuals.

The following articles (sourced from the internet) show that this is gaining traction and unless the industry looks to find a balance through self regulation the government will impose regulation by pricing mechanisms as it now does with both beer and cigarettes.

Research that ranks Australians among the world's worst abusers of alcohol is more proof of the need for alcohol tax reform and price increases, experts say.

Professor Paul Haber, medical director of Drug Health Services for the Sydney South-West Area Health Service, said introducing a volumetric tax would help to reduce the broadscale but overlooked impact of alcohol abuse on Australian communities.

"The impact of alcohol is huge - for example, in emergency departments three-quarters of the patients seen on a Friday night are typically there because of alcohol-related problems," Prof Haber told reporters on Tuesday.

"The same applies outside the hospitals for police in country towns - it is such a massive impact that it is like the elephant in the room and we can't see it."

Prof Haber said research showed that increasing warning labels on alcohol products would do little to curb problematic consumption, and that only an unpopular increase in prices would drive the consumption and cultural changes that were needed.

"Increasing the tax, and applying the tax in a volumetric way - per unit of alcohol - is overall the most effective single thing you can do, but it is not very popular," he said.

"A tax on alcohol would make it more expensive, and people drink less (so) instead of having 10 drinks their pocket will be emptied out after five or six."

A volumetric tax, one of the recommendations of the Henry tax review, would replace the nation's 13 different alcohol tax rates with a single per-volume levy that would not differentiate between alcoholic beverages.

In general, the current system allows beer and wine products to attract a lower rate of tax per unit of alcohol than spirits.

Chris Doran, health economist at the National Drug and Alcohol Research Centre (NDARC), said the price of wine in particular should rise.

"Bulk wine, cask wine, is where the tax is low and so companies can afford to sell in bulk at discounted prices," Dr Doran said.

"The evidence locally, and internationally, is that volumetric taxation is the most cost-effective strategy ... in terms of reducing the harms of alcohol misuse."

Both experts attended the annual symposium of NDARC, at the University of NSW.

Latest data released at the symposium this week put the number of Australians who will experience alcohol dependence, or periods of serious abuse, during their lifetime at 3.5 million.

This amounted to 22 per cent of the population, ranking Australia among the world's worst countries for alcohol abuse.

The study also found less than one in five Australians with an alcohol problem would receive any professional help.

Source: Danny Rose, APP - SMH, Aug 10, 2010

AMA calls for cask wine ban across NT

The Australian Medical Association is calling for a Northern Territory-wide ban on cask wine in a bid to reduce excessive drinking.

A new study has found Territorians are 3.5 times more likely than other Australians to die from alcohol-related causes.

The AMA's Territory branch president, Dr Paul Bauert, says the easy availability of cask wine is contributing to the Territory's boozy lifestyle.

"I think it's the tropics, it's the laidback lifestyle and I think it becomes habit," he said.

"I think part of the means that policy makers should take to address this is for instance getting rid of those casks which make the habit easier and cheaper to continue.

Source: Alison Middleton, ABC News, Aug 2, 2010

A+ AUSTRALIA - WHAT'S THE STORY

The three most important considerations around purchasing a house? Location; location; location. Ask yourself the same question about launching a brand and the answer is likely to be: positioning; positioning; positioning.

Quite how well any brand statement positions a product has long been a source of debate, and the obvious answer is that it depends on the image of the product in question. Friendly, exciting and welcoming as Australia undoubtedly is, there is little 'halo' effect that has conferred that sought-after premium that French fashion, German engineering and Italian design all seem to command so effortlessly.

Wine Australia is introducing a new consumer brand strategy aimed at repositioning the Australian category with regard to image, price and representation. Simply titled, A+ Australian Wine, and supported with an entreaty for its community to tell its own story, the first phase of the launch is based around capturing winery stories and will be liberated to a world of expectant consumers later in the year by way of print, on-line and social media.

Paul Henry of Wine Australia explained: "The most interesting thing about French wine is invariably the wine. The most interesting thing about Italian wine is invariably the regional cuisine that it compliments. The most interesting thing about Australian wine is never the wine alone, but rather the people that make it and the places that it comes from. This brand strategy is about capturing and telling that story.

"A+ Australian Wine is a simple statement that can challenge assumptions and change expectations of our category. Crucially, it looks to position the country where we want and need to be in the future, rather than where we currently are. The strategy is confident without being arrogant, and most importantly, it is based around using our greatest asset - our people and our unique regional communities - to demonstrate our point of difference. It is more important for Australia to position itself as interesting and engaging, than it is to aspire to be the

*biggest or the best." So, with an appropriately keen sense of irony, if your winery story is not on the **A+ Australian Wine** website, where the bloody hell are you..?*

Source: Australian Wine & Brandy Corporation, e-News Issue 30, 16 June 2010

It is pleasing to see that in this marketing campaign that winemakers and winegrowers are being asked to sign in and tell everyone your story about the diversity of this industry.

Growers are encouraged to check out the website that is being promoted internationally by the AWBC: www.australiaplus.com

On an initial search of the website it appears as though the Riverina wine industry is yet to be represented. A keyword search of Riverina, Griffith and a few of the local wineries returned no data. Growers should make a move and login and submit a story about your region, your production and why you are in the industry.

The website states that just being "good" and saying "Australia" on the label is no longer enough to tell the true story of Australian wine. The industry needs stories about the characters and places that give Australian wines distinctive personalities and make them uniquely Australia.

This site is also being linked to popular social networking websites such as Facebook and Twitter. It is really interesting to see the Australian Wine story being told and shared in such modern ways. Obviously research into how to interact with the younger generation has changed the approach.



TECHNICAL CONFERENCE INSPIRES CONFIDENCE

Around 1300 delegates attended this year's Australian Wine Industry Technical Conference (AWITC) and Rae Blair, Communications Manager for the Australian Wine Research Institute (AWRI), passed on the following comments about the conference.

International and Australian winery members enjoyed a feast of activities including workshops, conference sessions, a trade show, posters and more.

The conference program was again of the highest quality, with 43 Australian and 15 international speakers all challenging attendees to "take bold moves" with the information presented.

Positive out-takes from the conference included a presentation from economist Phil Ruthven from IbisWorld, who encouraged the industry with his prediction - based on more than 100 years of data - that there were good prospects ahead in the next five years and even better in the five after that.

The sessions about innovation were also well-received, particularly the topic of climate change, which gave

delegates a good understanding of the environmental challenges facing the industry and the technical responses being developed.

Another intriguing session was presented by Simon Tam from Hong Kong, who gave delegates an understanding of consumer behaviour in China, and tips on how to best communicate with this emerging audience.

The sessions were only part of the event, and delegates also attended WineTech 2010, which featured 170 international and national wine industry suppliers.

In his closing summary, Conference Chairman, Professor Sakkie Pretorius told delegates a story about a boy who held the fate of a butterfly in his hands. He said that these events equipped the industry with crucial information needed to make their businesses sustainable into the future. "What you now do with it, is in your hands."

Source: AWBC Wine Australia E-News Issue 31 - 6th August 2010.

Did you know? – China

- The top five suppliers of bottled wine imports to China, year ending May 2009 were France (42%), Australia (20%), United States (7%), Italy (7%) and Chile (7%) (Source: GTA).
- Total Australian wine exports to China grew 37% per year from 1999-2000 to 2004-05 and increased at a rate of 84% per year from 2004-05 to 2009-10.
- The Barossa Valley and McLaren Vale are the top regions exporting to China.
- Shiraz is the most popular exported varietal to China, followed by Cabernet Sauvignon and Merlot.
- A recent Wine Intelligence Survey showed that 53% of Chinese middle class are aware of Australian wine.
- The Chinese middle-upper class is expected to reach 80 million adults in 2025, with the number of wine drinkers having the potential to increase to between 40 and 60 million.
- Wine Intelligence suggests the market for imported wine in China could grow to between 70 and 80 million cases by 2025.

CURRENT POLITICAL PLEDGES RE MURRAY DARLING BASIN

The following information has been compiled by journalists Tom Ardup and Dylan Welch of the Sydney Morning Herald August 12, 2010 - Sourced Online.

LABOR

- Will use voluntary buybacks to recover the water needed to return the river to health.
- Commits to accepting recommendations from the Murray-Darling Basin Authority on cuts to water entitlements.
- Will start water-saving works at Menindee storage lakes in NSW by October.

COALITION

- Promises to implement reform to the Murray-Darling Basin with a balance between environment and rural communities.
- \$730 million boost to water-saving infrastructure and help for rural communities, including a commitment to the Menindee works.
- A one-off purchase of 150 billion litres of water for the drought-stricken Lower Lakes in South Australia.

WRAA TOOLKIT AVAILABLE FOR GROWERS

Vineyard Decision Checklist

This checklist and the complementary *Vineyard Redevelopment Options* were developed specifically for WRAA following a qualitative survey of Australia's vineyards.

The checklist highlights the requirements for vineyard best practice as determined by the market-defined end use for the fruit. It is designed to help vineyard owners to review the sustainability of their vineyard performance and assess whether they need to make changes, seek further professional evaluation, or make decisions about the future of some vineyard areas.

There are four clear steps, each involving a series of questions inviting yes/no responses. No data is required as it is a first-pass diagnostic that reveals issues requiring follow up investigation. Download from www.wfa.org.au/WRAA.aspx

VineBiz Ready Reckoner for grape growers

Developed by Wine Grape Growers' Australia, VineBiz is an Excel-based financial Ready Reckoner that allows grape growers to analyse their gross margin return by block, variety or entire enterprise simply by inputting the area of grapes they grow by variety, the tonnages harvested and the prices obtained against the cost of production data for the whole vineyard.

In short, it determines which parts of a grape growing enterprise are making money and which parts are not. A complementary Growers' Guide explores nine alternative business models.

In a recent email sent to Riverina Growers it was advised that a cost existed to obtain this. This is no longer the case as the Board has secured enough copies of the program for growers. Interested growers should contact the Board.

Wine Benchmark Calculator

This website <http://readyreckoner.wfa.org.au> is a powerful tool for wineries and growers to determine the costs of wine production based on real export and domestic sale scenarios. For example Riverina Chardonnay (un-oaked and stored for 6 months) selling in Australia at \$4.99 per bottle retail via a distributor or agent will return \$0.29 per bottle to the winery if the grapes are purchased at \$172 per tonne. If the purchase price goes to \$300 per tonne the winery gross margin per bottle is \$0.15 or 9.7%. The site advises a sustainable gross margin is 40% for wineries.

This calculator would be a good tool for growers when grape prices are released. If you know where your grapes end up and the wine style you should try this tool prior to discussing prices with your buyer.

ENTWINE PROGRAM GAINING TRACTION IN THE RIVERINA

Westend Estate are the latest winery in the region to adopt the EntWine Environmental Program for winegrape production and processing. Unlike Orlando Wines and DeBortoli Wines instead of commencing a pilot program they are requiring growers to be trained and fully implement the system this year.

The system will require growers to be accountable for their on-farm environmental impacts. They will be required to record and report on the following indicators: Tonnes of grapes produced; Area under vine (excluding

headlands), Electricity use in kilowatt hours, Total water use in megalitres, Total nitrogen applied in kilograms, Total unleaded petrol use in litres, Total diesel (excluding biodiesel) use in litres, Total LPG use in litres.

The training which is 100% refundable via Farm Ready will be followed up by a 3rd party audit every three years. It is hoped that the EntWine will provide a marketing advantage for the wineries in select markets.

FEDERAL REPRESENTATIVE WATER MEETINGS

The Wine Grapes Marketing Board recently joined with High Security Irrigators - Murrumbidgee and Riverina Citrus to meet with federal representatives in Canberra to discuss the benefits of irrigation in this region.

The discussions provided the federal representatives with information about this region and the differences between high and general security irrigation licences. Most of the people spoken to did not realise that irrigators already provide 5% of their entitlement to environmental flows.

In recent weeks a lot of promises are being made about water and the buyback of the gap between the SDL's and the current amount of water already gained through purchasing and infrastructure savings. The Wine Grapes Marketing Board is in favour of a free and open market for water but this should be accompanied by investment in infrastructure to help irrigation become more sustainable via creating better efficiencies and more jobs in regional centres. Simply buying water will leave remaining irrigators with higher costs.

Winegrape Purchases: Price Dispersion Report 2010 - major varieties

Variety / Region	Price Intervals	0-250	250-300	300-350	350-400	400-450	450-500	500-550	550-600	600-650	650-700	700-750	750-800	800-850	850-900	2000+
Cabernet Sauvignon																
Murray Darling - Swan Hill	% Share	8	21	60	7	0	1	0	2	1	0					
	Ave \$	208	255	322	378	400	450	509	563	600	660					
Riverina	% Share	21	24	18	17	15	1		1	1	0			0		
	Ave \$	233	266	310	360	417	490		556	625	652			834		
Riverland	% Share	16	7	70	6	0	0			1						
	Ave \$	185	263	332	350	400	491			600						
Chardonnay																
Murray Darling - Swan Hill	% Share	72	10	12	1		1	2	0			2				
	Ave \$	191	256	305	352		451	500	550			720				
Riverina	% Share	40	1	48			3	5	0					3		
	Ave \$	172	280	339			470	500	550					834		
Riverland	% Share	89	5	1			1	2	2	0						
	Ave \$	205	250	300			469	522	558	613						
Merlot																
Murray Darling - Swan Hill	% Share	11	37	29	21		2			1						
	Ave \$	215	275	309	383		450			600						
Riverina	% Share	2	18	17	42	6	9	4						1		
	Ave \$	217	271	311	362	425	476	500						834		
Riverland	% Share	15	65	4	9		5			1						
	Ave \$	196	282	304	351		453			600						
Pinot Gris																
Murray Darling - Swan Hill	% Share		1	7	4	18	13	3			53					
	Ave \$		272	303	370	423	452	500			685					
Riverina	% Share		15	4	2	64		12							3	
	Ave \$		280	300	360	400		500							2000	
Riverland	% Share		9		13			74		4						
	Ave \$		277		370			500		600						
Sauvignon Blanc																
Murray Darling - Swan Hill	% Share	5	34	19	20	10	6	6								
	Ave \$	183	269	309	367	416	455	502								
Riverina	% Share	0	0	59	2	39										
	Ave \$	177	262	304	375	400										
Riverland	% Share	2	44	5	2	1	46									
	Ave \$	188	270	326	350	423	450									
Semillon																
Murray Darling - Swan Hill	% Share	54	38	2		2	2	1								
	Ave \$	183	266	317		428	450	516								
Riverina	% Share	80	1	14		1	0	1		2						
	Ave \$	193	268	300		400	475	500		600						
Riverland	% Share	48	41	4		7										
	Ave \$	184	269	300		400										
Shiraz																
Murray Darling - Swan Hill	% Share	18	16	58	6	1	1	0	1							
	Ave \$	200	254	325	380	400	450	500	560							
Riverina	% Share	16	7	34	10	11	13	5	3	1	0	1		1		
	Ave \$	203	268	312	364	423	490	513	559	625	660	706		834		
Riverland	% Share	16	7	76	1	1				0				0		
	Ave \$	190	254	339	354	400				600				800		

ANALYSIS OF PRICE DISPERSION REPORTING

Price dispersion reporting was completed for the 2010 season by the Australian Wine and Brandy Corporation. It is a useful tool that allows us to see at what price point the majority of winegrapes was purchased.

It is important to note that this report is different than the Weighted Average Price report that was shown in the last Vine Chat newsletter.

This report has been formatted to show the regions major varieties in comparison with the other inland production regions, Riverland and Murray Valley (Murray Darling - Sunraysia). The Riverina pricing information is highlighted in Yellow and the peak market activity (percent per price) is highlighted in Orange.

Please note that the pricing segments that have a percentage rating of zero (0) means that the

percentage of winegrapes sold at this price point was below 1 percent. It is interesting to note that in this region there are some growers still receiving very high returns per tonne. It is assumed that these purchases are made under existing contracts. Based on the current market conditions it could be assumed that once these contracts expire they are unlikely to be renewed.

Out of the seven varieties shown in the table the Riverina only achieved higher pricing for a majority of its production on 3 varieties, Chardonnay, Merlot and Semillon. Chardonnay is perhaps questionable because while 48% was purchased at \$339 another 40% was purchased at \$172. If you view the report in detail it provides some insight to the yield restrictions that have been placed on growers in the region and the variation that exists within pricing at various wineries.

GRASSROOTS TOUR FOR GROWERS TO MILDURA

Under the GWRDC Funded Grassroots project for 2010-11 the Board has been successful in having the following project approved that will enable growers to see first hand work what is being done in another region.

A tour will be arranged to follow a regional workshop that will outline the alternative varieties available to growers and the skills development required to learn how to proficiently graft vines. It believed that growers can benefit from seeing situations where vineyards have undergone restructure measures (such as Mildura).

The Mildura region is advanced in its measures to change to new varieties and the undertaking of innovative research at the Dareton viticultural station is integral for growers to see first hand the results of these grafting trials.

The extensive grafting trial being carried out at the Industry and Investment (I&I) NSW Dareton Institute will expose the options for grafting

varieties to see the success and failure of different combinations of Vinifera and rootstock material in a vineyard that had previously been mothballed.

Innovative growers in the Mildura region will also be sought out and visits arranged over a two day (one night) tour program. It is intended that the tour will visit two farms on the first day followed by a speaker at the group dinner, and then visit 2-3 farms/processing facilities the following day before returning to the Riverina in the afternoon.

The tour will be subsidised by the Grassroots project with some costs to be covered by participants.

As the project is only just kicking off if growers are interested in attending the regional workshop and the tour to Mildura they should contact Kristy Bartrop (Industry Development Officer) to advise of their details. It is understood that the tour will need to occur mid season to ensure that growing characteristics can be viewed in the grafting trial.

NEW OFFICE MANAGER FOR WINE GRAPES MARKETING BOARD

The Wine Grapes Marketing Board welcomes the appointment of Mrs Sheree Collins to the position of Office Manager. Sheree is from Leeton and commences her employment with the Board on Monday 16th August.

Sheree replaces Ms Heidi Watt who has been with the Board for the past 12 months. Heidi is leaving to get married and move to Victoria.

The Board wishes Heidi and Brian all the best for their wedding and life in rural Victoria.