

2006 ASVO VITICULTURE SEMINAR - MILDURA

ASVO 2006 Viticulture Seminar - 'Finishing the Job' - Optimal Ripening of Cabernet Sauvignon and Shiraz

The 2006 ASVO Viticulture seminar will be held at the Mildura Arts Centre, 199 Cureton Ave, Victoria, Australia on Friday, 21 July 2006.

Following on from the successful 'Transforming Flowers to Fruit' seminar held in 2005 where 330 people heard about the vine physiology behind fruit production, the ASVO has compiled their next viticultural seminar titled 'Finishing the Job' - Optimal ripening of Cabernet Sauvignon and Shiraz.

Focusing on the ripening period from veraison through to harvest, the issues of source sink relationships and how they can manipulate all aspects of fruit ripening will be discussed. It seems any understanding of how vines ripen can be attributed to the way in which

 ASVO VITICULTURE SEMINAR 'Finishing the Job' – Optimal Ripening of Cabernet Sauvignon and Shiraz Friday, 21 July 2006 Mildura Arts Centre, Mildura VIC Margaret River Education Campus, WA (video conference) Applethorpe Research Station, DPI&F, QLD (video conference)	
9.00-9.30am	Registration
9.30 am	Introduction Chris Dundon, ASVO President
9.35 am	Session Chair Steve Partridge, Agribusiness Research and Management
Focus on ripening process from veraison to harvest	
9.40 am	<i>Overview of the source sink balance within a grapevine from veraison</i> Steve Tyerman, University of Adelaide
10.00 am	<i>Colour and tannin development during berry development and ripening</i> Simon Robinson, CSIRO
10.20 am	<i>Seed development and phenolic compounds in seeds, skins and wines</i> Renata Ristic, University of Adelaide
10.40 am	Questions
10.50 am	Morning Tea
11.25 am	Session Chair Kerry de Garis, Hardy Wine Co

Cabernet Sauvignon focus	
11.30 am	<i>What influences Cabernet winegrape composition more – Berry size and/or vine water status</i> Mark Matthews, University of California, Davis, USA
12.10 pm	<i>Growing Cabernet with minimal water inputs: Berry ripening and wine quality</i> Amy Richards, SARDI
12.30 pm	<i>Green characteristics in Cabernet Sauvignon</i> Kerry Wilkinson, Curtin University of Technology
12.50 pm	<i>Case Study - Berry sensory workshops, tracking flavour development – (Cabernet Sauvignon)</i> Sue Bell, Stonelover Winery
1.10 pm	Questions
1.20- 2.20 pm	Lunch
2.25 pm	Session Chair Russell Johnstone, Orlando Wynham Estate
Shiraz focus	
2.30 pm	<i>The basis of variation in the size and composition of Shiraz berries</i> John Gray, Charles Sturt University
2.50 pm	<i>Effects of canopy and irrigation management on Shiraz production, quality and disease development in South Australia region</i> Rachel Ashley, Foster's Wine Estates
3.10 pm	<i>Vascular transport into Shiraz berries</i> Suzy Rogiers, NSW Department of Primary Industries
3.30 pm	<i>Case Study – Practical aspects to improve fruit ripening in Shiraz from veraison</i> Wendy Allan, Pinokkie Wines
3.50	Questions/Close

carbohydrates are allocated within a vine. The speaker line up on the day will enable participants to have a better understanding of this process and also be provided with the latest information on the topic.

The key international guest speaker will be Mark Matthews from UC Davis who will talk about Cabernet Sauvignon and the role berry size and vine water status can have on fruit and wine composition. Local speakers will present information relating to the main red varieties of Cabernet Sauvignon and Shiraz including Renata Ristic, University of Adelaide, who will talk about seed ripening and Kerry Wilkinson, Curtin University of Technology, who will detail green characteristics in Cabernet Sauvignon. Two case studies to reflect the more practical aspects of grape growing will be presented and encompass how decisions are made by winemakers to pick fruit using berry sensory techniques.

The table shows the program of speakers for the seminar, for more information please contact Jason Cappello Technical Officer at the Board.

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Vine Chat



March - April 2006

VINTAGE UPDATE - RECORD HIGH FOR RIVERINA

Harvest has continued for the past 15 weeks across the region. At the time of writing the harvest was almost complete with indications from the voluntary reports provided by regional wineries that the tonnage is well up from last year, particularly those of white winegrapes. A full table of the most recent tonnages harvested are included in this newsletter on the following page.

Chardonnay tonnage was always going to increase based on the known increased bearing area but an increase of almost 35% above the 2005 crush figure was not predicted. Semillon was also 25% up on 2005 tonnes. These major white varieties now account for over 70% of all white winegrape varieties produced in the Riverina region.

A couple of standout white varieties that are increasing in consumer favour are Pinot Gris and Viognier that were up 104% and 174% respectively above previous year tonnes. This increase was from a much smaller base than most other varieties. The total white winegrape crush was 20% greater than the previous year.

Of the red winegrape major varieties both Shiraz and Merlot have come in above the previous years intake figure. However it is still too early to call as to what the final tonnage may be for the region for these varieties.

Whatever the final tonnages for the region amount to, one thing is already certain, it is a record year for the regional industry. This record high has been accompanied by a major downturn in prices as the national industry struggles to utilise the crush and sell the wine from this and previous vintages. How this will work for the following vintage (2006-07) is hard to tell as the other major inland regions of the Riverland SA and Murray Valley NSW/VIC have reported a drop in production for the 05/06 vintage from previous years.

Winegrape Index Activity Disappointing in 2006

The winegrape index has not been widely accessed by potential buyers as it has previously in other vintages. This is consistent with a large number of grape growers making direct contact with wineries from within the region and more notably from outside the region.

Our inland region competitors, the Murray Valley and the Riverland had an estimated 100,000 tonnes of

winegrapes seeking a home, whereas the Riverina had 8,500 tonnes registered by growers that could not initially place them with local buyers.

Of the fruit that was listed by regional growers 13 individual requests have come from potential buyers this year (the same as in 2005, 0 in 2004 and 48 in 2003 when the index first started). In 2006 (this year) the highest number of wineries were canvassed by the Board compared to previous years however the market was very flat with very little interest in extra fruit shown by external potential buyers.

Grapes Being Picked to the Ground

This year while some grapes have been lost to weather and bird damage a percentage of grapes has been harvested to the ground or simply left on the vines to rot.

The Board has been advised of approximately 500 tonnes of winegrapes that have been physically harvested to the ground. In some cases the growers undertaking this activity have not even sold a portion of that variety being "thrown away" because they could not find a home or were not prepared to sell for low prices.

All growers have the right to act differently on this issue and, with a record crush in the making the vintage options for Riverina growers were extremely limited. The motives behind harvesting to the ground are varied, with some reasoning that it will reduce incidence of disease in next years crop, whereas other comments are that the more grapes that are harvested for whatever price only increase the risk of continued oversupply in the industry and this may be reflected in prices.

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2006 Riverina Delivery Information as at 14/04/06

Variety	Tonnes Crushed 2006	Total Tonnes Crushed 2005 ¹	2005-2006% variation	Est. Tonnes Remaining ²
WHITE VARIETIES				
Chardonnay	63,794	47,448	34.5%	0
Chenin Blanc	1,169	1,073	8.9%	0
Colombard	14,218	13,072	8.8%	3,088
Doradillo	0	94	0.0%	33
Marsanne	802	881	-8.9%	210
Muscat Gordo Blanc	4,897	5,160	-17.7%	776
Palomino	36	175	-79.9%	0
Riesling	5,021	4,316	16.4%	0
Sauvignon Blanc	3,910	3,389	15.4%	0
Semillon	46,130	36,714	25.6%	0
Traminer	5,177	4,821	7.4%	0
Trebbiano	3,232	4,904	-44.1%	1,427
Verdelho	6,341	5,572	13.8%	0
White Frontignac	1,586	1,478	7.2%	0
Botrytis Semillon	1,022	1,257	-18.7%	636
Sylvaner	21	26	-19.6%	0
Pinot Gris/Grigio	3,226	1,529	111.0%	0
Viognier	1,320	481	174.4%	0
Other White	146	183	-20.1%	77
Total White	162,048	132,573	22.2%	6,247
RED VARIETIES				
Barbera	441	454	-2.9%	0
Black Muscat	31	40	-22.1%	72
Cabernet Franc	348	402	-13.4%	0
Cabernet Sauvignon	22,206	21,968	1.1%	3,267
Chambourcin	81	45	79.3%	0
Durif	5,313	4,440	19.7%	45
Grenache	310	300	3.6%	70
Malbec	49	35	42.3%	2
Mataro	923	1,496	-38.3%	624
Merlot	16,267	14,945	8.8%	500
Petit Verdot	2,343	2,476	-5.4%	1,553
Pinot Noir	2,568	2,830	-9.3%	0
Red Frontignac	622	568	9.6%	0
Ruby Cabernet	10,122	11,372	-21.0%	2,993
Sangiovese	614	884	-30.6%	341
Shiraz	63,131	51,506	22.6%	615
Tempranillo	1,171	909	28.8%	3
Zinfandel	781	749	4.3%	0
Other Red	256	818	-68.8%	550
Total Red	127,577	116,236	9.8%	10,635
TOTALS	285,440	248,808	16.4%	16,882

¹ Total Tonnes crushed for 2005 figure comes from the data reported to Wine Grapes Marketing Board via the provisions of the Wine Grapes Marketing Board (Reconstitution) Act 2003.

² Estimates are provided by known winegrape processors on a weekly basis.

³ Weekly tonnes is the cumulative total of the regions winegrape processors advised Riverina crush (provided voluntarily to the Wine Grapes Marketing Board).

PAYMENT DATES AND REMINDERS FOR GROWERS

The following table shows the wineries that have been given permission by the Board to make payment directly to growers this year.

WINERY	CITY
Andrew Peace Wines	Piangil (VIC)
Beelgara Estate	Beelbangera
Berton Vineyards	Yenda
Casella Wines	Yenda
Charles Sturt University	Wagga Wagga
Dal Broi Family Wines	Griffith
De Bortoli Wines	Bilbul
McWilliam's Wines	Yenda/Hanwood
Nugan Estates Pty Ltd	Griffith
Nugan Quality Foods	Griffith
Orlando Wyndham Group	Griffith
Piromit Wines	Hanwood
Foster's Wine Estates	Magil (Sth Australia)
Taylor Ferguson & Co	Brunswick (VIC)
Toorak Winery Pty Ltd	Leeton
Vico Wines	Griffith
Warburn Estate	Griffith
Westend Estate	Griffith
Zappacosta Estate	Hanwood
Pinical Estate	Griffith

These wineries have signed an agreement to make payments in accordance with the due dates (15th May, 22 June and 12th October 2006). Growers that are not subject to contracts that may vary these terms should immediately advise the Board if they experience any problems with payments this year.

If problems occur the Board can withdraw the winery's application and force all payments to come through the Board to allow these to be monitored.

Interest is also due on any outstanding or delayed payments (unless other provisions are specified in a complying contract).

The following table shows the wineries that have applied to make payment directly to growers but have not been allowed by the Board.

WINERY	CITY
Terrel Estate	Yenda
Southern Highland Wines	Moss Vale

The following wineries have not made application and will be making payments through the Board for any purchases made during the 2006 Vintage.

WINERY	CITY
Aust. Commercial Wines	Registered in VIC
Evans & Tate	West Perth (WA)

How Payments are to be made by wineries

Payments directly to growers by wineries listed are to occur in the following manner(s):

- Made available as a cheque made out to the grower for pickup by the grower by 12 midday on the due date, or
- Transferred by EFT to the growers nominated banking account so that funds are cleared by the due dates. A confirmation of the transaction must be forwarded to the grower on the same day, or
- Sent as a cheque made out to the grower via Australia Post, post marked on the due date.

How Payments will be made by the Board

Payments directly to growers through the Board will occur in the following manner:

- Posted to the growers business address on the due dates, or
- Direct deposited into the growers account where arrangements have been made previously.

Growers to Be Alert

Growers are requested to contact the Board office if they have any queries in relation to the payments this year.

The Board has also sent information about our Terms and Conditions of Payment to many wineries that have bought grapes in the past. **If growers know of other wineries that have bought Riverina winegrapes in 2006 they should contact the Board immediately.**

BEWARE OF BUYERS

As the industry faces more winegrapes coming into production and wineries making cutbacks to growers many growers are being forced to review where they might be able to sell their crop.

The Board has been advised that a number of growers have been enticed to sell their wine grapes to new entrants to the market. The credentials and history of these buyers are not fully known to the Board, if in fact the buyer is known at all to the Board.

How does a grower ensure that they will receive payment for their winegrapes in these uncertain times?

The first step is obviously advising the Board where the grapes have been sold and to whom. Without this knowledge the Board has little opportunity to enforce the payments. If a company enters bankruptcy or insolvency unfortunately there is little that can be done as most winegrape suppliers must line up as unsecured creditors.

The next step is confirming the supply arrangement in writing with the buyer. Note payment terms for your fruit are enforceable by the Board and can only be altered by the buyer if they are more favourable than the statutory



Leonie Scarlett/Ruralphotos.com

terms. All payments for grapes may be made through the Board. Then if the buyer reneges on payment the Board can fund legal action to obtain payment as though the debt belongs to the Board. **Keep the Board informed if you are having problems with payments.**

MURRUMBIDGEE HORTICULTURAL COUNCIL UPDATE



Making Sense of Flow Rate Share

In late February Murrumbidgee Irrigation sent information to all their shareholders on Flow Rate Share. Since then they have been meeting with groups of shareholders to explain the detail of their proposal. Because meeting with grape and prune growers in Feb/March is virtually impossible, Murrumbidgee Irrigation has given an undertaking to continue shareholder meetings into March/April for these groups. Growers wanting to attend an information session should contact their Grape Grower Association (or the WGMB) for more information on these meetings.

What is Flow Rate Share: Essentially, Flow Rate Share is about the ability of the irrigation system to deliver water to irrigators when they want it. Murrumbidgee Irrigation's proposal provides an agreed minimum delivery rate for periods of restriction (eg during peak demand when everyone wants to water at the same time). However, even during times of restriction High Security irrigators have a guaranteed priority of

access for water delivery. This means that High Security water orders (given with 48hrs notice) will be filled before a General Security water order.

What does it mean for me? Defining Flow Rate Share is new and challenging. Murrumbidgee Irrigation talked with Murrumbidgee Horticulture Council Inc., WGMB, Riverina Citrus and other stakeholders when preparing their proposal and provided assurances that there will be little if any impact on High Security Irrigators. As the Flow Rate Share proposal is implemented the Murrumbidgee Horticulture Council Inc. will monitor its impacts to ensure there are no unintended effects. If you have any questions about what Flow Rate Share means for you, or any concerns about changes to your water access, please don't hesitate to call us on 6964 2420 or call in to our Olympic Street office.

MHC will hold an open meeting in May – this is an opportunity for you to see how we operate and raise business for consideration by the Council. You can register your interest by phoning our office on 02 - 6964 2420 or dropping in to 20 Olympic St Griffith New South Wales 2680.

LEARNING ABOUT VINEYARD COST STRUCTURES

The Board is constantly searching for better ways to serve the growers of the region. In the current economic climate it is very interested in tools or methods that are available to assist growers in calculating their costs.

The Board's Technical Officer Jason Cappello recently returned from the Hunter Valley where he was sent to investigate a workshop being held for growers that may be of use to the winegrape producers in the Riverina.

The Hunter Valley Vineyards Association together with the CRCV ran a vineyard profitability and benchmarking performance workshop for their growers. Also attending this workshop were winegrape growers from Mudgee, Cowra, & Orange producing regions. The workshop was run by Mr Albert Haak who owns and manages a viticulture consulting business in Western Australia (WA) and is currently working with Grape and Wine Research and Development Corporation (GWRDC) on this vineyard performance benchmarking project. The bench marking project is currently being developed into a web based site known as 'VineSite' performance analysis.

Mr Haak has been carrying out this profitability and benchmarking analysis for growers in WA for some years already but now it is being developed into the web based "easy to use" version, taking a step up from the use of spread sheets to record growers information. The vineyard benchmarking project is currently still in its infancy, being a two year pilot project plan, and the website which is being used is not yet opened to public assess. However the concept and its use for growers nationally would be able to take place once it is up and running. Access to the internet would form a critical component for growers to use such a tool.

Mr Haak presented as being very skilled and was a great presenter with plenty of practical knowledge in the cost structure of wine grape production. The Board will be considering the merits of funding him to visit and present in the Riverina during the development phases of this project.

His attendance in the region may also prove worthwhile once this website has been fully developed or the project has had further progress that will benefit growers of the region.

The project involves growers using the website to input their farm cost information and details for each block on their vineyard (sprays, management time

and costs, capital costs, etc) to be able to assess and compare costs and profitability (gross return per block) of all their different blocks and make informed decisions on how to maximise their overall viability and sustainability.

Identification of underperforming blocks may encourage growers to utilise different management practices or implement strategies to maximise yields or address quality concerns.

This project has been kept as simple as possible and would allow growers to benchmark their individual blocks through the website as well as within the region or with other regions participating in the web based project. The costings within the project website are setup in activities or jobs such as harvesting or pruning and these can be compared to others involved along with overall costs. The website will keep all individual farm information confidential and only produce regional reports with minimum, mean and maximum benchmark values to compare your own results.

It should help growers to be able to see what areas they may be able to reduce costs in, or even where to try or make changes to improve on one blocks performance to lift overall profitability of the vineyard.

Initially the Board will be investigating using a similar (non-web based) system with growers as part of the Board's (Viticultural Information and Technology Transfer) VITT Group's being development for this year.

Jason reported that overall the information was definitely worthwhile to hear and it is good to know that this project is underway. However until this project is completed and the tool made ready for growers the Board prefers not to hold a presentation in the Riverina.



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FEDERAL ISSUES UPDATE

Wine Grape Growers Australia Inc.

The newly formed federal body for growers is well up and running with its new Executive Director Mark McKenzie hitting the ground running on behalf of the issues facing the industry.

The new body held its inaugural meeting recently in Adelaide and it was attended by wine industry growers representatives from the major production states. It is now hoped that growers will start to see the impacts of having a truly united federal organisation that is able to provide valued services to the grass roots.

The new body is setting up an office in Adelaide to be close to the major players of the industry, these being the Australian Wine and Brandy Corporation, the Grape and Wine Research and Development Corporation and the Winemakers' Federation of Australia. One of the first important tasks is to appoint an independent Chair for the organisation, a person whom is able to dedicate as much as 2 days per week to the position and be available to travel to the many meetings with industry. If any growers have suggestions with regard to a Chair they should contact the Board office.

Riverina Representation

The Riverina will have one representative seat on the new body (Chairman of the WGMB) and the opportunity to have an observer at all meetings to assist the representative (CEO of the WGMB). This doubles the opportunity for the issues of the Riverina to be heard within the federal forum.

Federal Wine Industry Summit

Many would recall the call that came during the Christmas and New Year period for the industry to convene a Summit to address the problems being faced by the grape grower sector of the industry and to look for plausible solutions to the problems in the industry.

It was agreed that this would be held but the timing of such and the interference of vintage has delayed this. It is now expected that this will occur in June 2006. It will be held in Melbourne and hopefully be the catalyst for change within the industry. It is important that real solutions come from the Summit as a "talk fest" is not what is needed in the industry but tangible and achievable solutions that can have immediate impact on the industry to rectify many of the problems it is plagued with, more notably oversupply of wine and winegrapes.

Some of the options that have been raised at the inaugural federal meeting for discussion at the summit now

need careful development, these include:

- Placing a nationally collected voluntary levy on all production that will be utilised to fund growers to leave winegrapes on the ground (more details of the proposal are found within the latest Australian Viticulture magazine).
- A requirement for the industry to maintain a federal register of vineyard plantings to enable more accurate planting data for planning. This to be coupled with a system for vineyard registrations.
- Development of a better system for counting winery stock levels throughout the year, as the unknown of how much wineries have in stock impacts greatly on price offers.
- Investigation of federal governments guidelines for Exceptional Circumstances and other forms of financial assistance to provide options for growers during difficult times (loans not handouts).
- Earnest adoption of the Senate recommendations (inclusive of the instigation of the Mandatory Code of Conduct).
- Review of the taxation issues underpinning vineyard investment expansion that has occurred nationally.
- Mothballing of vineyards to reduce input costs during periods of low returns.
- Collective bargaining provisions that will allow producers to band together and negotiate a price with the winery buyer, rather than the current situation of being only a price taker.

If any growers have any other options that they feel may warrant closer scrutiny please do not hesitate to contact the Board office and speak with Brian Simpson on the matter. The Board appreciates those growers that have already taken the time to consider potential options that could benefit growers in the future.

Code of Conduct

One of the major issues that the WGGA is currently dealing with is the development of a voluntary code of conduct in consultation with the Winemakers' Federation of Australia. At time of writing consultants are being reviewed to determine their suitability for writing the code. It is envisaged that once the voluntary code is in place nationally its level of adoption will be closely monitored by Government and industry. If wineries do not take on the code in earnest the industry will be well placed to push for government to make it mandatory.

TALKING UNDER THE VINES

Picking Grapes to the Ground

A real mixture of comments from around the region has occurred in relation to the Board publicising the harvesting of winegrapes to the ground by a grower has highlighted the differences between and within growers and among wineries thinking on the matter.

Comments that Tony Baggio was paid to pick these grapes to the ground or that it was a funded publicity stunt by the Board are completely false.

The truth behind this worrying issue is that Tony Baggio did harvest the majority of this Chardonnay crop to a winery under contract. He also received a price that this winery had in advance agreed to as what they believed was a fair and reasonable price. The fact that this price was ultimately greater than most spot market prices is of no significance to the matter.

Tony had a right to sell the remainder of his crop to any buyer that he could find, even his current purchaser if they wanted it. He had listed his grapes on the WGMB Winegrape Index hoping to find a buyer and had actively contacted numerous wineries in a bid to obtain a return for these grapes.

Tony received only one offer, which in many cases was more than other growers in similar circumstances had received. This offer was for \$150 per tonne. He did his sums and calculated even with the use of his own equipment to harvest and freight the grapes to this buyer he would obviously not make a profitable return. His reasoning was that in providing his grapes at such a low price to a buyer it could easily be used against himself and the industry in price negotiations next year.

What has not been reported is the numerous other growers in similar circumstances that have picked their grapes to the ground instead of taking grapes at lower than cost prices. Some of these may have sold a portion of their crop already but were not willing to sacrifice more expense for a minimal return on these expenses.

This was not a stunt to belittle the price offers of wineries. It was a way of publicly showing growers that there



are possibly other ways to view the current crisis within the industry and ways that growers may be able to impact their own destiny.

All growers know the differences in prices across the region this year, especially for Chardonnay. Growers understand that wineries have different markets for this wine (fruit) and therefore position themselves accordingly with the price they offer.

The same issues can be applied to growers, different economic circumstances abound within the grower base that wineries source their fruit from. Growers are very astute and know if they can afford to sell for no return.

What will happen next year?

This is the most concerning question of all, especially if we see a continuation of fruit from out of town being offered into this region at low prices by these growers trying desperately to get some cash flow to survive. Is reducing input costs of production a viable solution if it reduces yields and ultimate returns? Will picking onto the ground suit? The most honest answer lies in what growers individual financial circumstances are, as 2007 could be the vintage of no return for many players nationally.

The industry will return to some normality, it is cyclical, however with a larger tonnage base it may take more time to readjust than it previously has.

IMPORTANT DIARY DATES FOR GROWERS

15th MAY	FIRST PAYMENT TO GROWERS 33% OF THE PURCHASE PRICE
22nd JUNE	WINE INDUSTRY SYMPOSIUM (NWGIC - WAGGA WAGGA)
22nd JUNE	SECOND PAYMENT TO GROWERS 33% OF THE PURCHASE PRICE
27th JUNE	WINE GRAPES MARKETING BOARD ANNUAL GENERAL MEETING YOOGALI CATHOLIC CLUB - YOOGALI (ALL GROWERS WELCOME)