

## TERMS AND CONDITIONS OF PAYMENT FOR 2012

Growers are advised that as previously reported the **Board no longer sets Terms and Conditions of Payment**. This means that for the current vintage (and possibly future vintages - depending on further negotiations with the NSW Government) the dates on which wineries are to pay growers is a negotiated position between the grower and the winery. Many contracts and supply agreements already stipulate these and some of these have traditionally been different to the three instalment system employed by the Board.

**The impacts of this are not catastrophic**, as many wineries have indicated that they will continue to remit payments to growers based around the previous standard of three payments (May, June, Oct). It now means that before growers deliver wine grapes without something formal in place with the winery you should be **asking what the payment terms are**. Furthermore if the winery does not pay in time and has not made any attempt to discuss this matter with you directly you should contact the Board so that we can act.

**The Board can still operate on your behalf by coordinating legal action if necessary.**

It is now more important than previous that growers advise the Board if they are having any payment

difficulty through their winery. Growers should in the first instance contact the winery to seek an explanation as to why they have not received their payment or when these will be made. It could be a simple response such as a cheque not being posted to the correct address or an account number transposed incorrectly.

The Board will be monitoring any problems and reporting these to the Minister for Primary Industries on a regular basis. The Minister has also advised the Board that she has requested that the NSW Small Business Commissioner Ms Yasmin King consider the issue of payment procedures and practices in the wine industry in the NSW Riverina as a priority issue.

The Minister has assured the Board that Ms King will actively monitor the situation and can advise a recommended course of action if late payments by wineries become an ongoing issue.

Growers are advised that if you require assistance or wish discuss your options for alternative dispute resolution in relation to repeated late payments other than that which the Board can provide the Office of the Small Business Commissioner can be contacted directly.

**Phone: 1300 795 534**

**Email: [we.assist@smallbusiness.nsw.gov.au](mailto:we.assist@smallbusiness.nsw.gov.au)**

## SUBMISSIONS TO THE MDBA

All growers are encouraged to write submissions to the Murray Darling Basin Authority (MDBA) in relation to the forthcoming plan. It is important that when doing so that you write at the top of the correspondence that it is a submission or it may be regarded as a letter and not included in the deliberations on the plan by the MDBA. To make a submission on line you can head to the internet: (www address on the next paragraph)

[www.mdba.gov.au/have-your-say/make-submission](http://www.mdba.gov.au/have-your-say/make-submission)

Or simply write to them at:

Proposed Basin Plan,

The Murray Darling Basin Authority

GPO Box 3001, Canberra City ACT 2601

## LEVY RETURN - BANK CHEQUES

In 2011 the Board returned to all growers a \$1.50 per tonne on the fees and charges 2011, making the effective rate \$2.40 per tonne (not \$3.90 per tonne).

The Board now reminds growers to deposit this cheque immediately. If you have lost or misplaced your return cheque please contact Sheree Collins our Office Manager 02 6962 3944 (cost is \$15 per cheque).

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## PRICING INFORMATION NEEDED

All growers are encouraged to provide copies of any pricing information received from wineries to the Board. This information is critical in enabling the Board to better represent you.

At the end of 2011 the only wineries that had provided pricing information to their grower bases were Orlando Wines and Westend Estate. These were classified as indicative prices and may have changed prior to harvest. These announcements are important for the growers, Orlando Wine released the information in accordance with the Wine Industry Code of Conduct, whereas Westend Estate did it in response to growers seeking this information.

At the start of vintage wineries should release their full price lists to their grower base so that growers can use this information to speak with their wineries about possible changes - this has not happened across the region with growers even reporting selling without a price. The Board has received some information from

the Riverland and Murray Valley which is show a minor increase in the prices being offered this season. This increase has yet to surface in the Riverina region as there is a lack of real competition in the market.

The Board in an effort to increase competition is advertising the Wine Grape Index on its website via Wine Industry Classified in a bid to attract other buyers to the region. Growers should not be concerned with an increase in freight costs if an increase in the price being paid can also be obtained. It is hoped that having extra competition in this region will increase demand and therefore prices.

Any pricing information that growers can provide is relevant in allowing the Board to more effectively represent your interests. Please do not assume that the Board gets this information provided to it by wineries, as they have no obligation to do so.

All information received from growers will remain confidential as to whom provided it to the Board.

## GRAPE SPILLAGE PRESENTING A PROBLEM AGAIN



Growers are again reminded that the issue of grape spillage in the region is an important issue that effects your industry's image in the region. In the past it has caused minor road accidents and a number of growers have been reported to the local councils and received fines. All it takes is an observant road user to see a truck inadvertently spilling a berry and they can report this to the local council. There have even been reports in the past of trucks being fined although their load was incapable of spilling. To challenge these matters you need to undertake appropriate legal action in local court which can be expensive and difficult to prove your innocence.

While the Board understands that not all road spillage is avoidable it appears as though one of the biggest

problems facing transport drivers is not the stopping at intersections heading to the winery but the impact that other road users have on the heavy vehicles. The Board has received multiple reports by truck drivers of such incidents leading to a spillage.

The Board has contacted the local police to determine the best course of action that truck drivers can undertake if another road user causes them to spill loads on the road. The police have advised that you should take their vehicle registration details down and report the matter to the police. While they cannot guarantee that they will take action on the matter it provides the driver with a trail of evidence should a member of the public report them for the spillage that may occur.

Unfortunately the onus of proof again lies with the truck driver and while this is not entirely satisfactory it should be employed at every instance. Some drivers may consider placing driving cameras in their vehicles to obtain evidence of the incident that would be irrefutable.

The Board encourages all growers and transport drivers to report spillages that they see on the roads. The local councils have emergency clean up crews that can get the road cleaned and reduce possible accidents.

**Griffith City Council contact number 6962 8100**

**Leeton Shire Council (Technical Services) 69530911**

## CCA TREATED POSTS INVESTIGATED - WGGA REPORTS

Early 2011 Wine Grape Growers Australia (WGGA) sought industry feedback on CCA treated posts within industry. At a meeting in Adelaide hosted by the GWRDC, WGGA presented the collection of views received from industry across Australia.

In terms of outcomes, the predominant view expressed was that the information available was confusing and needed to be improved. The GWRDC have undertaken to create a Fact Sheet to address this and is also considering the development of a fact sheet on alternatives to treated pine posts.

In addition, there were both policy issues and research topics that came out of the meeting and the GWRDC and wine sector stakeholders present undertook to take these to their respective decision-making fora.

### Research topics included:

1. Field trials of alternatives to CCA treated posts
2. Life cycle analysis of CCA treated posts and alternatives
3. Feasibility study of a PostMuster
4. Market analysis of reuse strategies
5. Market analysis of pyrosis

### Identified policy questions included:

1. Acceptability of landfill as a disposal mechanism?
2. Who pays for disposal?
3. Who is responsible for product stewardship?
4. How would a PostMuster work?

The regions providing feedback represent roughly a third of the area of vines in Australia. Use of CCA treated posts is reported to be extensive with their advantages described as: Cheap, Effective, Robust, Reliable, Durable, Stronger than alternatives.

The identified alternatives were: Steel, Cypress, ACQ (10-20% more expensive), Recycled plastic.

Responses were mixed about the level of awareness of issues to do with use and disposal CCA treated posts.

### Breakage during mechanical harvesting was rated as a significant issue.

Recycling (on-farm, between farms and regions, off-farm) was rated as an effective disposal mechanism. Exceptions to this included: Lack of recycling prospects for broken posts, The requirements to move posts to PIZ districts made it uneconomical, The solution is not as productive in times of slow growth in the industry, as at the moment (although bushfires in recent years were an opportunity)

Solutions proposed in the feedback, to both the use (environmental impacts if they exist) and end-of-use disposal, included the following:

The strong view among the respondents was that manufacturers bore a responsibility to be more proactive on the issue, For example - assist with identifying and implementing disposal options, identifying pathways for correct disposal, developing CCA extraction techniques.

Others were, use of the Ocloc solution to broken posts, Wider use of alternatives, Disposal as kiln fuel, Reselling through Nurseries, Commercial Co-ops, Regional stockpiles (properly set-up, eg covering to stop rain leaching of chemicals).

Improve the attractiveness of alternatives.

Achieving price declines of ACQ (Ammoniacal copper quarternary) treated posts.

Improve harvester technology to reduce breakage.

Promote use of end-of-life posts to other industries.



Image: CCA Treated Post Stockpile in South Australia

# WINE GRAPES MARKETING BOARD

## DE BORTOLI & CASELLA WINES FINANCIAL REPORTS 2009-10 & 2010-11

While the issue of grower profitability is a major cause of concern among regional growers the following information obtained by the Board from ASIC relating to our 2 major wine grape buyers in the region, Casella Wines and DeBortoli Wines indicate that the industry is largely profitable for them as the following comparative breakdown and analysis of the past 2 years shows. Please note that DeBortoli Wines Pty Ltd report was reported as thousands, i.e. 000's which is the reason these numbers are all rounded off at zero's.

Underpinning the Casella Wines profits for the past two years is the gains that they have made in foreign exchange financing activities, \$68.5million in 2011 and \$15.9 million in 2010. ↗

As an export company that is majorly focused on overseas destinations they have to contract and hedge funds to ensure a level of profitability. As at 30 June 2011 they held a number of forward exchange contracts which when they are replaced may reduce their overall profitability (unless they can increase their product price - which would be difficult in the US market).

DeBortoli Wines Pty Ltd on the other hand made foreign exchange losses in 2010 and 2011 (\$2,043,000 and \$1,629,000 respectively).

Casella Wines activities in foreign markets and their wise exchange contracts have enabled them to continue to drive growth in their business, without these they may only be at breakeven at best.

<b>Casella Wines</b>	<b>2011</b>	<b>2010</b>	<b>DeBortoli Wines</b>	<b>2011</b>	<b>2010</b>
Revenue	\$344,092,871	\$394,950,387	Revenue	\$162,131,000	\$161,505,000
Other Income	\$68,541,005	\$15,914,659	Other Income	\$31,997,000	\$29,121,000
Expenses (grouped)	(\$348,349,932)	(\$394,883,444)	Expenses (grouped)	(\$183,724,000)	(\$180,474,000)
Profit before income tax expense	\$64,283,944	\$15,981,602	Net financing costs	\$13,315,000	\$4,656,000
Income Tax Expense	(\$18,948,322)	(\$3,728,732)	Profit before income tax expense	\$23,719,000	\$14,808,000
<b>Profit for the year</b>	\$45,335,622	\$12,252,870	Income Tax Expense	(\$12,083,000)	(\$1,768,000)
<b>Retained Profit</b>	\$404,061,250	\$374,277,154	<b>Profit for the year</b>	\$11,636,000	\$13,040,000
			<b>Retained Profit</b>	\$202,151,000	\$190,923,000
<b>Major Costs of the Business as a percentage of Revenue (from sale of goods)</b>					
Cost of Goods Sold	58%	53%	Cost of Goods Sold	63%	67%
Marketing/Selling	9%	10.7%	Marketing/Selling	11%	12.5%
Freight/Distribution	5.6%	4.6%	Freight/Distribution	4.1%	3%

Reports of increased capital acquisitions can be confirmed in the financial reports.

DeBortoli Wines increased their freehold land (at cost) by over \$8 million (up to \$28.8 million at the 30th June 2011). They also increased their Plant and Equipment by almost \$5.5 million from the previous year.

Casella Wines Pty Ltd has also been busy (recently noted in the media as having purchased some 11 vineyards covering 1,370 ha in South Australia over the past 6 years - according to adelaidenow.com.au). John Casella is reported as stating that they have invested more than \$100 million on grapes, packaging goods, transport and company employment in SA in the past two years alone. Now more than 107 SA growers are contracted to sell their grapes to Casella Wines. ↗

Casella Wines assets of freehold land increased just under \$2 million from 2010, Plant and equipment increase \$20 million in the 12 month period. It may be that the increase is predominately in the new beer production facility that has commenced operations.

Any way you look at these businesses they are strong and returning profits at a time when the industry is suffering. The industry needs viable business such as Casella Wines and DeBortoli Wines and it also needs business that will support the supply chain back to the grass roots.

Note: the financial reports of other wineries in the region were not available. The size and scale of these business's requires them by law to submit their financial reports to ASIC and these are available for purchase.

## 2012 RIVERINA GRAPE INTAKE - AS AT 19 FEBRUARY 2012

	2009 tonnes	2010 tonnes	2011 tonnes	As at 19 Feb tonnes	% complete
<b>WHITE VARIETIES</b>					
Chardonnay	75,719	60,597	71,876	59,246	88%
Chenin Blanc	983	739	657	414	58%
Colombard	12,998	8,553	10,358	947	10%
Muscat Blanc (Frontignac)	3,950	4,323	8,456	8,975	87%
Muscat Gordo Blanco	4,378	3,759	4,607	24	0%
Pinot Gris	11,567	10,902	13,939	14,210	108%
Riesling	4,192	3,506	3,772	3,564	94%
Sauvignon Blanc	5,329	5,793	9,085	9,384	99%
Semillon	35,872	32,740	33,815	24,494	82%
Traminer	5,469	5,112	6,637	5,267	84%
Verdelho	5,951	5,479	5,224	3,550	83%
Viognier	3,554	3,377	2,828	309	16%
Other White	304	555	1,579	353	19%
<b>TOTAL WHITE</b>	<b>172,959</b>	<b>146,702</b>	<b>172,840</b>	<b>130,738</b>	<b>80%</b>
<b>RED</b>					
Cabernet Sauvignon	24,309	17,341	22,111	133	1%
Durif	3,532	3,561	3,238	160	4%
Merlot	19,463	16,321	19,445	2,972	13%
Muscat Brown (Red Front)	680	528	701	180	25%
Petit Verdot	2,003	2,408	2,151	0	0%
Pinot Noir	2,919	3,304	2,775	2,608	66%
Ruby Cabernet	8,260	6,472	6,825	280	4%
Sangiovese	555	549	426	74	15%
Shiraz	68,624	59,842	53,406	11,709	20%
Tempranillo	993	1,941	435	0	0%
Other RED	2,958	3,346	2,840	573	17%
<b>TOTAL RED</b>	<b>134,568</b>	<b>115,765</b>	<b>114,353</b>	<b>18,689</b>	<b>14%</b>
<b>TOTAL GRAPES</b>	<b>307,528</b>	<b>262,467</b>	<b>287,187</b>	<b>149,427</b>	<b>51%</b>

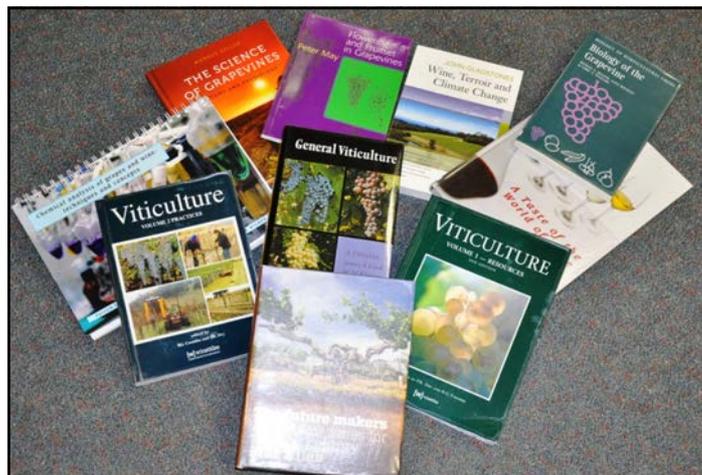
**Notes:**

- Results with 99%(Approx) response. 2012 progress figures have been increased pro rata.
- % complete based on original winery estimate of intake.
- Wineries estimate the crop is around 10 days more advanced than last year.
- Wineries reported an expected intake at the start of harvest which may not equate to actual or forecast production.
- Information kindly provided by the Riverina Winemakers Association - compiled by Stuart McGrath-Kerr

## CREATING COMMUNITY COLLECTIONS

Last year it was reported to growers that in response to a request by the Griffith City Library the Wine Grapes

Marketing Board was donating a number of viticultural related books to the library in return for the library also funding an equal number of books on the same topic.



With the National Wine and Grape Industry Centre in Wagga Wagga providing a list of 12 relevant books the Board ordered these and the library covered the costs of half of the purchase.

The Board can now proudly report that these books are now available in the library to borrow and be used as reference material for our industry and for those wishing to study the industry.

Ms Amanda Martimbianco - Collection Team Leader with the Griffith City Library sent through a picture of the books prior to them going on the shelves.

## RABOBANK WINE QUARTERLY INDICATES SOME CHANGE IN MARKETS

Rabobank's latest offering titled "Trends and outlook for the international market" January 2012, talks about the international scene and the following trends:

Varied seasonal conditions have resulted in mixed harvest outcomes across Europe but will deliver a 2011 EU crop largely similar to the prior year. Crop outcomes across the major producing countries of France (+11%), Italy (-14%) and Spain (-2%) have varied widely and are divergent enough to significantly affect relative pricing for each country in the year ahead.

The broader 2011 Northern Hemisphere harvest has been restrained when taken alongside the lower US crop (-9%), and generally supportive to grape prices at a time when the low Euro and US dollar are acting to support demand.

The assessment of the Southern Hemisphere (in preview). **Australia:** Improved seasonal conditions and ample sub-soil moisture and irrigation water supplied across South East Australia is generally conducive to increased marketable production in 2012. What remains to be seen is the degree to which current year yield have been impacted by the extreme disease pressure experienced by many vineyards in 2011. The grape market remains constrained by the high dollar, but supported in places by lower industry stock levels.

**South Africa:** Current industry estimates are for the 2012 grape crop to be roughly 4% larger than in 2011, but the growth will be mainly for distilling, for concentrate and for brandy. Wine production is currently projected to fall 1%.

**Argentina:** Industry forecasts point to a lighter 2012

Argentine harvest compared to 2011. Preliminary estimates suggest as much as 10% production decrease, with declines to be most pronounced in San Juan. The *millerandage* (shot berries) caused by the dry and hot Zonda wind reportedly affects table grapes more than wine grapes, nevertheless there is some expectation of lower Malbec yields.

**Chile:** Early evidence points to a potentially larger 2012 Chilean wine grape harvest. The higher prices received by many growers in 2011 are likely to provide some incentive to boost yields, aided by generally favourable seasonal conditions.

**Export Conditions:** Australian export volumes in the 10 months through October 2011 fell 10.9% on the prior year to 655.3 million litres. Reduced supply and the high Australian dollar have pressured export volumes, with exporters upwardly revising their pricing structures to combat margin pressure. Average bottled wine export price increased 4.8% to AUD 4.30 per litre, while bulk wine prices increased 6.3% to AUD 1.01 per litre.



The entire report can be sourced from [www.rabobank.com](http://www.rabobank.com)

## STATUTORY BODIES ARE REQUIRED IN DIFFICULT TIMES

Given the recent unrest within the Riverina Citrus industry and the grower poll to look at the future of the citrus body the office has fielded a few calls in relation to the Board's future and the role that it has to play within the region.

It is therefore important that the Board remind growers of some of the advantages of having a representative body in the region. While the Board is not able to set prices for wine grapes the work that it undertakes is very important to growers and wineries alike.

### **Point of Contact for Media, Public and Government**

The Board regularly fields calls from the print, radio and TV media on the issues affecting regional growers. At times the national and state media are also interested in how growers are fairing in terms of returns and in the event of natural disasters.

The Board attempts at all times to present the views of growers fairly however it is not able to have editorial say over what is printed or what makes it to air, therefore at times key messages may be lost or confused. Having our own bi-monthly newsletter Vine Chat enables the Board to have full editorial control over content and it tries to be informative and relevant to growers information requirements. Having a high readership (80%+) of this product is excellent.

The media are always wanting to get a story directly from growers and the Board members often assist but speaking to the media can be performed by any grower. Growers wanting to assist are asked to contact us so we can keep a list. Sometimes the media only wants an in field photo or a different point of view to a topic that cannot be provided by your staff.

### **Representative Work**

Whether it is talking about water security, fruit fly, market access, research and development activity and priorities, road transport and farm safety issues the Board represents your interests.

We are involved with NSW Workcover on their Primary Industry Reference Group, regional fruit fly committee, Wine Grape Growers Australia and the GWRDC, RTA and many other regulatory bodies.

While many regional representative bodies have taken credit for the Murrumbidgee Irrigation contract negotiations the truth remains that the local based solicitor engaged and paid for by the Board undertook the majority of the negotiations with the company on behalf of the assembled organisations.

More recently though the entire MDBA water debate has taken more and more time from the Board and staff to ensure that grape producers are well represented, the Board is now a voting member of the National Irrigators Council and an observer on the NSW Irrigators Council.

The 2010 State Government Inquiry into the wine grape market and prices was set up after many approaches to government by the Board. While the outcomes to date have been disappointing, the Board is still in there battling for growers. The Board has written to the government and opposition front bench expressing its concern that none of the recommendations from the inquiry were adopted.

The wine industry code of conduct is an area where the Board see's great benefit for growers and wineries alike, regionally based wineries are slow to adopt and giving industry good reason to mandate the code in the near future. Such continued pressure by your organisation is critical for its future success.

### **Marketing of Grapes**

The Board continues to provide the Wine Grape Index online. A service that has put more wineries in touch with growers than any other. The Index allows growers that have been displaced to market their fruit and it has been quite successful over the years. In 2012 the Board is advertising the index nationally and while the grapes are slowly moving it is another tool that will generate competition in this region, which is something that is surely lacking.

### **Grassroots and funded project work**

Having skilled and capable viticultural staff is important to the Board so it can offer on site services to growers when needed. Our quality staff are always seeking knowledge and developing extension activities that are relevant to our regions needs.

### **Spray Diary and HACCP System**

The Board's produced spray diary is a versatile tool for the industry and even though many growers are moving toward online spray diaries the hard copy format can be used in the shed to keep spray records and allows easy compliance with EPA requirements.

### **The Board listens**

While it is true that we can no longer set prices the Board does listen and respond to grower needs. It is a grower funded and managed organisation that's true value is that it is here for independent grape growers.

## ONLINE NEWS SNIPPETS - EDITED

### USA - Winegrape boom is projected to continue in 2012 (1 Feb 2012 - Ag Alert)

The pendulum has swung back in the right direction for California winegrape growers in 2011 following a couple years of lower prices and drop in demand for grapes that was linked to the worldwide economic downturn. Jon Fredrikson US Wine Industry said "I think there is still too much bulk wine and bottled wine coming into the United States. Moscato is a good example. California growers are planting a lot of muscat grapes, but demand is outpacing supply so until those wines start bearing, a lot of wineries are sourcing their moscato overseas, coming from Australia, Italy and other countries. A lot of the foreign wines coming into the United States is bottled wine, but there is also a lot of bulk wine coming into this country."

Nat DiBuduo, president of Allied Grape Growers in Fresno "We have finally worked ourselves into a position where we need to plant more grapes. I am asking for strategic planning, smart planting of winegrapes with contracts," he said. "We are going to see a lot of grapes going into the ground in the San Joaquin Valley. They are all being planted with contracts that are going to bring prices that are sustainable to both the growers and the wineries and at consumer price points that are acceptable."

### Yellow Tail Joins Sweet Red Phenomenon - 24 Jan 2012 - Shanken News Daily

W.J. Deutsch & Sons says it will launch a new extension to its Yellow Tail wine brand, Sweet Red Roo, this March. The new addition, the 15th wine in the Yellow Tail portfolio, is a blend of Shiraz, Cabernet Sauvignon and other red varietals. "Sweet Red Roo is the nexus of two categories on fire with consumers right now - sweet wine and red blends," said Francois Magnant, Yellow Tail's brand director, noting a 246% jump in sweet wines' dollar value in 2011 (Nielsen).

Yellow Tail has already had some success in the sweet wine segment—its Moscato, released in mid-2011, sold over 300,000 cases by year end. Sweet Red Roo will sell for \$6.99 per 750-ml. and 11.99 per 1.5-liter bottle, and feature a bright red prismatic label.

While its former torrid growth slowed during the economic downturn, Yellow Tail remains the top-selling imported wine brand in the U.S. by a wide margin and in the top five wine brands overall at over 8.3 million cases. The Aussie label is currently being backed by a \$9 million media campaign through March (the end of Deutsch's fiscal year).

### USA - Moscato Madness: Identifying the good stuff (2 Feb 2012 - San Francisco) - US wine writer Richard Jennings

America's in the midst of a much bigger wine phenomenon than the sudden upswing in Pinot Noir sales following the 2004 release of the movie *Sideways*. Sales of slightly sparkling sweet wines with underlying acidity made from the Muscat grape have exploded over the past two years among younger buyers, especially Millennials -- the 21 to 30 age group.

Nielsen tracks sales data for many food and beverage products, including wine. They reported U.S. sales of Moscato increased over 200% between 2009 and 2011, and that they rose again by 78% in 2011, exceeding \$300 million in sales for that year.

Moscato's to avoid include those produced by the giant wine conglomerates: Gallo (Barefoot Cellars), Trinchero (Sutter Home), Constellation Brands (Woodbridge and Robert Mondavi), The Wine Group (Cupcake) and Australia's Casella Wines (Yellow Tail). The Yellow Tail version is, in fact, so bad -- more like lemon-lime soda pop than wine -- that I'm not sure I would ever have identified it as wine if I hadn't poured it out of a wine bottle myself. (Not a good comment for our wines. Ed)

## IMPORTANT DATES FOR YOUR DIARY

**Murray Darling Basin Authority - response to plan**

**Due Date:** Monday 16th April 2012

**Email:** [submissions@mdba.gov.au](mailto:submissions@mdba.gov.au)

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