

DOMESTIC ALCOHOL CONSUMPTION SLUMP TO HIT WINE

A recent report by market research analyst IBISWorld revealed that in 2016-17, domestic consumption of alcohol per capita is expected to reach the lowest level of the past 50 years — part of a trend of consistently declining alcohol consumption over the past decade.

Beer brewers also struggled, with “negligible export exposure forcing them to rely on limited domestic demand”, the report said.

IBISWorld expected overall per capita alcohol consumption to decrease by 0.8 per cent over the next financial year, to 9.37 litres per capita.

This trend is forecast to continue, with alcohol consumption in Australia expected to fall to 8.54 litres per capita by 2023-24, down from 10.57 litres in 1990-91. IBISWorld senior industry analyst Andrew Ledovskikh said the decline was largely due to government legislation and increasing health consciousness among consumers.

“Government campaigns changing the perception of alcohol consumption have helped reduce per capita alcohol consumption,” Mr Ledovskikh said.

“You are also seeing people under 30 being one of the main drivers for reduced alcohol consumption — we are seeing generally increased health consciousness, measured by gym participation, smoking rates, Google searches and food consumption choices.”

Mr Ledovskikh said these choices were less likely to affect a category such as wine.

“Drinks such as craft beer, which is seen as a social premium drink, or wine, also a social drink that is largely appreciated for its flavour and quality — that sort of consumption hasn’t really declined that fast, or even increased at times in certain categories,” Mr Ledovskikh said.

“But things like mainstream beer, ready-to-drink spirit pre mixers, these things have dropped off quite rapidly and that implies that there’s a strong link to health consciousness because these are beverages that are associated with risky drinking behaviour.”

“There’s nothing to imply from the data that IBISWorld is looking at that this health conscious trend is going to decline,” he said.

“But what you have to remember that population is increasing, and over the past five years there has been a marginal increase in total alcohol consumption, but a very strong decline in per capita consumption.”

Mr Ledovskikh said many winemakers had managed to maintain margins and find new growth as export demand for Australian wines boomed, particularly in Asian markets. According to IBISWorld, export markets represent the largest market for wine makers, and are expected to account for 41.5 per cent of industry revenue in 2016-17, totalling \$2.5 billion.

“A lot of these tariffs aren’t fully removed as part of those free trade deals, but we are seeing a lot of businesses getting in early to establish relationships and set up shop in what they imagine is going to be a very lucrative market over the next five to 10 years,” Mr Ledovskikh said.

Domestic wholesale wine merchants represented the second largest market for wine makers, and were expected to account for 27.5 per cent of industry revenue in 2016-17. Wine Australia chief executive Andreas Clark said the wine industry had known for a long time the importance of developing, sustaining and fostering export markets.

“The success of the Australian wine industry has been on the back of export markets for many years,” Mr Clark said.

“The domestic market is obviously an important market, it’s a home market and one where a lot of producers have ready access, especially through cellar doors and direct to consumer sales, but the export markets are of critical importance.”

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BOARD ACTIVITIES REPORT



Submission to Wine Equalisation Tax Rebate: Tightened Eligibility Criteria Implementation Paper

The Board recently submitted a response to this calling for the WET Rebate of \$500,000 to be removed completely. The current proposal that it be redefined and made no longer available for grape growers is not acceptable. If growers aren't able to obtain similar financial benefits within the industry from the federal government then the entire system needs to be removed for the sake of the industry's future.

The Rebate is the single most destabilising item within the industry as it works to reduce the overall value of wine and undermines the profitability of all growers in the industry.

ABARES Regional Outlook Conference: The Board CEO Brian Simpson has been invited to speak about the industry at the forthcoming regional conference to be held in Griffith on 26th October 2016 at a yet to be confirmed venue. The CEO will be talking about the need for a Wine Industry Code of Conduct, Statutory Payment Terms and the removal of the WET Rebate in the Industry.

Levy Return for 2016

The Board is looking to return to all growers an amount of \$1 per tonne on all winegrapes harvested and sold. Only those growers that have paid the statutory fees and charges will be eligible to receive the payment which will be made later in the year.

The process for payment this time will be for growers to provide to the Board their banking details which will allow the Board office to transfer those funds into your accounts at the same time.

Growers have all been sent a Delivery Summary Report for the 2016 season along with a Rate Notice that shows the varieties and tonnes harvested and the winery to which it was delivered. Growers are asked to review this information and respond to the Board if there are any errors in the production. Some of the tonnes you delivered may not be listed whereas someone else's tonnes may instead be listed in the report.

If growers have queries in relation to this matter please do not hesitate to contact the Board. We would rather resolve a problem well prior to making payments to growers.

Lunch in the Vineyard Cancellation

Unfortunately due to the ongoing inclement weather a suitably dry venue in a vineyard to undertake the event this season could not be found and the Board had to cancel the event prior to taking on further costs of arranging it. It is hoped that for 2017 this event will again proceed with requests being sent to growers that may have a suitable all weather venue available that the Board can use as a location for this promotional activity.

Payment Terms

Growers that are having difficulty in obtaining payment for their winegrapes should contact the Board. The Board is aware of a number of local growers that delivered to wineries that have not made full payment from 2015 and are continuing in delaying the winegrape payment in 2016.

The Board can assist growers with legal advice in these matters. It will also assist the Board in knowing which wineries are the problems and allow it to (a) advise other growers and/or (b) allow the Board to communicate these problems with the state and federal governments.

There is strong interest from government brewing in relation to payment terms as good structures are beneficial to the local economy as the cash flows easily through the economy unobstructed.

NSW Treasury lays bombshell on WGMB

On Monday 10th October the Wine Grapes Marketing Board was utterly dismayed and concerned by a proposal by the NSW Government to discontinue the Board and relieve itself of any administrative burden caused by the Board.

The Daily Telegraph ran a story with the Wine Grapes Marketing Board being one of greater than 200 Boards and Committees within NSW that were being targeted. The story even got some traction on the Ray Hadley radio show with him naming us several times.

Upon further inspection of the matter and following discussions with the local state member and the Minister for Primary Industries it is all about the State Government trying to reduce its administrative burden. The outcome of this is likely to mean that the Board may even realise some savings when it is all said and done. If we can reduce annual reporting and auditing costs then these are real benefits. In the meantime if growers wish to comment on the review please contact our office for further information.

AGWA FUNDED PROJECT PROGRESS REPORT 2015-16

The following report is provided as information for growers in relation to the funded project work being conducted by the Wine Grapes Marketing Board staff using funds provided for by the Australian Grape and Wine Authority under the Grassroots program.

Current Trail - Mid-Row Trial (Started April 2016)

The aim of the trial was to look at native and non-native plant species that could be useful in weed suppression and reducing costs of mid-row weed and cultivation management. The trial is to be held over a 3 year period. The effect of soil nutrient levels and health along with effect on vine vigour and crop yield will also be assessed.



Figure 1: Leeton Dryland® Mix - 26 May 2016

Mid-row species grown at the trial sites in Griffith and Leeton included a creeping saltbush (*Atriplex semibaccata*); a wallaby grass (*Rytidosperma caespitosum*); oats; Dryland® perennial mix of ryegrass/sub-clover/medic blend (Fig.1 above) and a cocksfoot/tall fescue/medic/sub-clover blend (Fig. 2) .



Figure 2: Griffith Cocksfoot/Fescue Blend - 6 Sept 2016

To date, the oats are proving most successful at suppressing weeds. The grass blends are showing some promise. Unfortunately the saltbush and wallaby grass have not proved successful – with very little recruitment of wallaby grass (after initial good germination) and no appearance of saltbush. The most likely explanation is due to weed competition post germination of the wallaby grass and very high rainfall and consequential water logging.

Re-sowing saltbush and wallaby grass without mid-row cultivation and/or planting of plugs has been considered utilising remaining seed from initial sowings. Alternative plant species are also being considered for the trial to replace the saltbush and wallaby grass as the initial cost of seed is prohibitive despite the potential of any future benefits. Testing of soil and yields will be carried out during vintage period.

Completed Trials

Brassica Bio-Fumigation 2015-16

Project outsourced to Dr Melanie Weckert, Senior Research Scientist, Plant Pathology/Soil Microbiology, NSW Department of Primary Industries, National Wine & Grape Industry Centre, Wagga Wagga.

The aim of this project was to carry out a vineyard field trial to examine the efficacy of a number of different brassica crops that release chemicals into the soil (biofumigants) that are toxic to fungi and some nematodes to decrease the severity and incidence of black-foot fungi (*Ilyonectria* spp.) in soil and grapevine roots. Black foot fungi is an important contributor (along with *Botryosphaeriaceae* trunk disease fungi) to reduced vine health, such as reduced yield, stunted roots and shoots. The spores can survive in the soil for up to 15 years (Weckert, 2016).

The Brassica biofumigation trial was undertaken by way of two field trials of Pinot Noir in Yenda.

Field Trial A: Undertaken in 2013/14 (Fig.3) and 2014/15 and included the following treatments applied buried under vine, excluding the control:

1. control
2. mustard seed meal under vines (2t/ha)
3. high rate mustard seeds (4t/ha)
4. deactivated mustard seed under vines
5. canola seed meal under vines (2t/ha)
6. canola seed under vines(4t/ha)

(Continued on page 4)

7. fungicide root drench as a known effective control for *Ilyonectria* spp.

(Weckert, 2016).



Figure 3: Field Trial A—Sowing of small replicated plots for data

Field Trial B: Undertaken in 2015/16 and all treatments were applied buried under vine, excluding the control:

1. Control
2. Biocontrol actinomycete MW555 (*Streptomyces violaceoruber*)
3. Biocontrol *Trichoderma viride* plus high mustard seed meal
4. Phos-acid placed in soil under vines (to stimulate the grapevine natural defence responses).
5. *Trichoderma* alone placed in soil under vines.

(Weckert, 2016)

Results showed that the application of deactivated mustard seed resulted in a decrease of black-foot fungus colonisation on grapevine roots and a 2.1 fold increase in grape yield. No other treatment at Field Trial A presented with any change in black-foot fungus colonisation, however all treatments showed an increase in yield except for the high mustard seed meal (4t/ha) and fungicide only application.

Field Trial B being in the first year of the trial was not able to show conclusively that yield increase was achieved, however suppression of soil pathogens was achieved by *Trichoderma viride* and *Streptomyces MW555*.

Dr Weckert suggests that good growth and yields in the vines could be a result of suppressive qualities of the treatments to pathogens in the soil however further investigation would be required.

Reference:

Weckert, M. (2016). The efficacy of Brassica biofumigation treatments for the control of vineyard root *Cylindrocarpon* (*Ilyonectria*). [Report to WGMB on progress (to 30/6/2016) for project]. Unpublished.

Weeds Workshop

This project was outsourced.

Presenter: Dr Chris Preston - Adelaide University.

Held at DPI Research Station Hanwood 20 May 2016

A comprehensive report on this workshop was published by the WGMB Industry Development Officer Kristy Bartrop in the Vine Chat, May - June 2016 issue. The publication can be accessed on the WGMB website in the Resources section <http://www.wgmb.net.au/>.

Precision Viticulture 2014-16

The trial used satellite imagery of Shiraz blocks in Griffith region over a 3 year period to assess correlation between vine vigour and grape colour.

The aim of using imagery is as a useful tool to enable the production of uniform quality through use of better irrigation management or to assign areas marked for



Figure 4: Retraining Vines Dec 2014.

premium or commercial grade which can potentially lead to maximising financial returns.

The images were measured against pre-assessed vigour and then grape colour and ripeness were assessed for correlation between each vigour group.

From data gathered in 2016 of 5 vineyards colour results showed a correlation to vine vigour (better colour for lower vigour) but not to ripeness.

Trunk Disease Trial 2014-16

Trunk disease in grapevines is a major concern Australia wide and found in Griffith. It is known to be spread via pruning wounds especially in moist conditions, and disease is also harboured in many woody plants such as citrus and almonds.

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A trial site was established on Durif grapes at the NSW DPI Research Station Murray Road vineyard between 2014-2016 to demonstrate recommended treatment and remediation of vines infected with trunk disease fungi species (*Botryosphaeriaceae*) as determined through previous research by Dr Sandra Savocchia and her team.^{1,2}

The treatment involved cutting vines back to 10cm below visual symptoms of disease (in this trial near to ground level-see Fig. 4) and retraining the strongest shoots.

Shoots post vintage in 2016 were tested by Plant Health Diagnostic Services, with trunk disease fungi species *Botryosphaeria spp.* and *Seimatosporium sp.* detected. Testing prior to this failed to find evidence of trunk disease despite visual evidence of trunk disease.

The trial has demonstrated that it is not only costly and

time consuming to remediate vines but eradication of disease is not guaranteed. Vineyards displaying widespread trunk disease symptoms are best to have a good nutrient application and yields monitored to identify when the existing vines are no longer viable. A full re-plant would give the best return on investment in the case of this trial site.

References:

1. Sosnowski M & Wicks T (2010) *Eutypa Dieback Factsheet, July 2010, South Australian Research and Development Institute, Grape and Wine Research Development Corporation (GWRDC).*
2. Wunderlich N, Pitt W and Savocchia S (2012) *Grapevine Trunk diseases; Symptoms and Distribution, Factsheet, August 2012, National Wine Grape Industry Centre (NWGIC)*

MEDIA WATCH

The Land, By Ashley Walmsley Page 15 Thursday 6th October 2016

Superannuation could be the sticking-point in the revised backpacker tax, announced last week.

While agriculture groups praised the Federal Government for its decision to abandon a proposed 32.5 per cent tax on working holiday makers (WHMs) in favour of a 19pc rate, some have questioned backpackers' rights to claim retirement contributions.

WHMs receive income and superannuation guarantee contributions at 9.5pc of their income. Australia is the only country that requires superannuation to be paid on all earnings.

WHMs can access their superannuation when they leave the country because they do not have the right to retire in Australia and receive the Age Pension, according to Treasury.

Superannuation payments to departing WHMs are currently taxed at an effective rate of about 47pc as the Departing Australia Superannuation Payment (DASP).

Last week's WHM visa changes will see that increase to 95pc from July 1, 2017 to help offset some of the cost of their reduced income tax rate.

Some submissions to the federal government's WHM visa review on the tax suggested the majority of the superannuation is not claimed by WHMs upon leaving the country.

The review's submissions also included anecdotal evidence on the regulatory burden associated with superannuation for WHMs with one respondent saying it took about three hours to process superannuation details for each new worker.

Guaranteed super, together with the high minimum wages and low tax rates, were considered effective lures for attracting international young people wishing to work and travel.

The majority of feedback at stakeholder engagement, as well as a large number of submissions, indicated that removing superannuation paid to working holiday makers was seen as an alternative to raising the tax," the review said.

In its submissions to the review, the Australian Taxation Alliance (ATA) said the short-term nature of employment conducted by WHMs should be reflected in a regulatory framework most adaptive to the situation.

"As such, entitlement such as superannuation or leave for individuals not intending to reside in Australia on a long-term basis represent an unnecessary regulatory and economic cost," it said.

It recommended classifying WHMs as similar to casual workers and repealing superannuation entitlement for WHMs who earn more than \$450 per month.

WINE GRAPES MARKETING BOARD

CONGRATULATIONS TO MCWILLIAM'S WINES

The Wine Grapes Marketing Board would like to offer its congratulations to McWilliam's Wines for receiving the Most Outstanding Exhibitor at the recent Riverina Wine Show Awards dinner, held Friday 30th September 2016 to start the unWined festival in the region.

Some of the awards that McWilliams' took out was the best Durif for their McWilliam's Wines 2015 Hanwood "1913" Durif, the Best Still Wine made from Riverina



Tony Baggio presented Ruth Sutherland of McWilliam's Wines with the Grower Excellence Award



Tony Baggio presented Andrew Higgins of McWilliam's Wines with the Best Still Wine made from Riverina Winegrapes

Fruit for their McWilliam's Wines 2015 Hanwood "1913" Touriga. For the same wine they also received the growers award for excellence that was sponsored by the Wine Grapes Marketing Board.

WINEGRAPE INDEX FOR 2017 - SEE FORM ENCLOSED

Growers: Enclosed with this newsletter is a form to complete and return if you have any available grapes this season. The Board expects a number of wineries to seek extra fruit this year in light of recent vineyard purchasing by one of the major processors in the region.

Growers that complete the form are asked to read the conditions and contact the Board if you do not understand completely. The process for 2017 season is quite simple. The Board will hold a list of growers that have available fruit for sale. The list may even include fruit that currently has a home but the grower is interested in going to another buyer for the season.

In the past the Board has forwarded these details to the wineries that call up seeking further tonnages. This has often worked against the grower, especially if the grower was already going to deliver their grapes to the winery seeking extra purchases for the season. Providing the list of growers, varieties and tonnages also alerts the wineries as to the amount of available

fruit in the market place and this could negatively impact of the price offer for the current season.

The Board upon receiving a formal request from a winery that they want a certain variety of winegrapes will call the growers and let them know. This process allows the Board to confirm that the tonnages are still available, i.e. haven't been harvested for another buyer or are still of saleable quality. It also allows the Board staff to touch base with the grower and provide them with the details of the winery that is seeking the extra grapes.

The Board will not negotiate on behalf of the grower for the sale of the winegrapes. The Board will not negotiate payment terms but trusts that the grower will ensure that these matters are dealt with prior to the sale/transaction being completed with the winery.

If growers want further information on how the Index for 2017 will work please do not hesitate to contact the Board office and speak to any of the staff.

WINE AUSTRALIA RELAUNCHES WINE BENCHMARK CALCULATOR

Wine Australia have given growers the tools to better negotiate grape prices with their wineries in the forthcoming season.

rr.wineaustralia.com/default.aspx

Go to this site and tick the box for "I have read and understood the terms and conditions" and then select Next >>

Growers are encouraged to speak to your winery about what specific markets your wine is destined for albeit domestic or export and the processes your wine has been through, length of holding, use of oak in the fermentation/maturation process etc.

With this information in hand you will be able to review the pricing side of the wine business to determine if the price you are to receive for your grapes is fair and reasonable according the Wine Australia Benchmark Calculator.

The Wine Benchmark Calculator lets you input data into the online system and select the market, the variety and retail price of the wine. The system also asks how long the grapes are stored for and if oak is used.

To test the process the Board ran the following numbers through the calculator.

Riverina Durif sold to a large winery and destined to be sold domestically at a retail price point of \$20.99 per bottle.

The wine would have 50% of the product held in a tank and the balance in American Oak for 12 months. The wine would then be bottled and held for a further 12 months at an alcohol content of 14 per cent.

The Price

Retail per bottle	\$20.99
Retail per dozen	\$251.88
GST per dozen	\$22.90
Retailer margin per dozen	\$52.85
WET per dozen	\$39.60
<u>Wholesale price per dozen</u>	<u>\$136.54</u>
Less:	
Distributor/Agent commission	\$31.51
Domestic Freight	\$3.40
<u>Winery sale price per dozen</u>	<u>\$101.63</u>

Production Cost

<u>Grape cost per tonne</u>	<u>\$426</u>
Extraction Rate per tonne	600
Cost of juice per litre	\$0.71
Processing cost per litre	\$0.60
Oak cost per litre	\$0.81
Holding cost per litre	\$0.61
Wastage Cost per litre	\$0.11
Wine Cost per litre	\$2.84
Wine Cost per dozen	\$25.57
Packaging Cost per dozen	\$17.00
Total cost ex winery per dozen	\$42.57
Winery gross margin per dozen	\$59.06
<u>Winery gross margin per cent</u>	<u>138.72%</u>
Sustainable Gross Margin	45%

The Gross Margin is revenue less cost of goods sold and is expressed as a percentage. For example, revenue of \$1 million and cost of goods sold of \$600,000 would equal 40% gross margin. The calculation is \$1 million minus \$600,000 divided by \$1 million.

The price per tonne was a nominated amount generated by the Wine Australia System and further in the system allows the user to actually nominate a price per tonne and review the gross margin. On this example alone and changing no other parameters other than the price per tonne even if we were to reduce the winery gross margin to 49% (which is above the proposed sustainable margin) the price per tonne that the winery could afford to pay is greater closer to \$2,000 per tonne for Riverina Durif.

GROWERS YOU SHOULD BE:

- (a) finding out more about where your wine is going, domestically or export and the effort that wineries have put into the product, and
- (b) using this calculator as a means of negotiating for a fair and reasonable price.

Many wineries will be using this system to check their own internal costs and it is fair that growers also take the opportunity to use it. If any grower wishes to use this and wants assistance please do not hesitate to call into the office and the staff can step you through it.

WINE GRAPES MARKETING BOARD

REGIONAL PRODUCTION SUMMARY FOR 2016

Contrary to previously published figures for the 2016 season the Board can report that the season was large in terms of tonnes produced. 314,588 tonnes of wine grapes were harvested and made into wine and came in a slightly below our previous record set in 2015.

Table 1 below shows that while the 2016 was again a large crop the region is capable of producing successive years of high production despite what the weather does.

The major varieties harvested in region are still: Chardonnay 68,786 tonnes; Shiraz 61,633 tonnes; Semillon 27,697 tonnes; Cabernet Sauvignon 22,929 tonnes; Pinot Grigio 22,148 tonnes; Merlot 20,471 tonnes; White Frontignac 13,904 and Sauvignon Blanc 13,728 tonnes. These major produced varieties account for almost 80% of the total production in the region.

63 varieties were harvested in the region with some as low as 6 tonnes of Chambourcin being recorded.

Interest in winegrapes for sale is growing

Growers that have available fruit for the 2017 season should be taking the opportunity to discuss with your

buyer an necessary increase in the prices for the forthcoming season. The past few seasons the region has not had a major recovery contrary to the Weighted Average pricing information that was published.

There is talk across the region of a number of wineries seeking to secure more fruit in 2017 and growers need to be aware that the first offer for your winegrapes may not be the best offer this season.

Growers are advised to know your costs and look to secure a profitable return this forthcoming season. It is understood that a number of wineries are offering contracts with prices in them that are better than previous price offers, however growers may soon get the opportunity to make a more viable return.

The office has fielded a number of calls this season from out of town wineries seeking production. This is based on growing demand and a shrinking national vineyard area. One of these wineries seeking fruit from within the region is mostly interested in red winegrapes so growers need to be aware and obtain a viable home for your grapes this season.

Table 1: Production Comparison Winery & Grape Growers 2011-2016

	2011		2012		2013		2014		2015		2016	
Grower	218,929	77%	195,162	80%	229,931	76%	197,342	75%	223,740	71%	224,599	71%
Winery	66,851	23%	47,959	20%	71,779	24%	66,692	25%	92,136	29%	89,875	29%
Total	285,780		243,121		301,710		264,034		315,876		314,474	

STAFF CHANGES AT BOARD

Bridget Murray our Technical Officer has resigned to take up a viticultural position in New Zealand. The Board will replacing this position and that of the

Industry Development Officer with an Extension Officer position in the near future. The Board would like to thank her and wish her all the best in her viti career.

GRIFFITH LANDFILL CAPABLE OF TAKING CCA TREATED POSTS

Following a number of enquiries by grape growers regarding the ongoing issue of treated pine post waste being stored on-farm and the potential risks to the local environment the Board sought information from the local council regarding a suitable site for these to be disposed of.

The Board has been advised that CCA products can be taken to the Griffith Landfill and Tharbogang and deposited for the price of \$56 per tonne of waste. These will need to be disposed of in accordance with instructions of the supervising member of staff.

Phone: (02) 6962 3944 Fax: (02) 6962 6103

Email: board@wgmb.net.au Web: www.wgmb.net.au Office Hours: 8:30am - 5:00pm Mon - Fri

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