



# Australian wine grape production projections to 2009-10

Thomas Jackson, Ian Shaw and Brenda Dyack

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# Foreword

The Grape and Wine Research and Development Corporation commissioned ABARE to produce wine grape production projections for the three years 2007-08 to 2009-10. The report provides information for both wine grape producers and winemakers to help them plan their production programs on the basis of projected grape supply by region and variety.

In this report production estimates are made for 27 wine grape producing zones, incorporating 83 regions across Australia. Projections are made for 24 specialist wine grape varieties, as well as multipurpose grapes and minor varieties for each region. While the base data for the estimates rely on the annual viticultural census undertaken by the Australian Bureau of Statistics, estimates of winery intake are based on the National Utilisation Project coordinated by the Australian Wine and Brandy Corporation.

Estimates of yield are based on industry feedback from each region, with the projections for 2007-08 and 2008-09 reflecting continuing difficult seasonal conditions in warm climate districts, where water for irrigation is expected to remain scarce. In cool climate regions, some improvement is expected in these years. By 2009-10, assuming a return to average seasonal conditions in all regions, wine grape production is projected to reach a record level.

This report and a set of detailed production tables by region and variety are available on ABARE's website, [www.abare.gov.au](http://www.abare.gov.au).

The data in this report also form an integral part of ABARE's analysis of the outlook for the Australian wine industry presented at OUTLOOK 2008 and published in the March edition of ABARE's quarterly journal, Australian Commodities.



Phillip Glyde  
*Executive Director*  
May 2008

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# Summary

- This report provides estimates of wine grape production for the 2006-07 vintage, as well as production projections for 2007-08, 2008-09 and 2009-10. Estimates have been made for specialist wine grape, multi-purpose and minor varieties in each of Australia's wine grape producing regions.

## Wine grape production in 2006-07

- Wine grape production in 2006-07 is estimated to have been 1.4 million tonnes, which is approximately 27 per cent less than the 2005-06 harvest of 1.9 million tonnes. This reduction was caused by several factors, including dry seasonal conditions, limited availability of water for irrigation, frosts and bushfires.
- In contrast to previous drought years such as 2002-03 when warm climate areas were substantially affected, the decline in wine grape production in 2006-07 was greatest in cool climate regions. This was related to exceptionally adverse seasonal conditions in cool climate regions, including very low rainfall and frost. In the warm climate regions frosts were less frequent and there was irrigation water available, although at reduced levels.
- Reflecting the predominance of white varieties in warm climate regions, in 2006-07 the production of white wine grape varieties exceeded that of red varieties for the first time since 1998-99. By variety, chardonnay represented the largest proportion of total production (27 per cent), followed by shiraz (20 per cent) and cabernet sauvignon (13 per cent).

## Wine grape production 2007-08 to 2009-10

- ABARE forecasts wine grape production in 2007-08 to be around 1.67 million tonnes, an increase of 19 per cent from 2006-07. Favourable seasonal conditions, particularly in cool climate regions, and better than expected production in the Riverina and Riverland, have helped boost production above estimates made earlier in the season. However, the lack of irrigation water in key production areas of south-east Australia is expected to keep this year's harvest 13 per cent lower than the record 2004-05 crop.
- Following improved seasonal conditions in cool climate regions, production of red wine grape varieties is expected to increase relatively more than that of white wine grape varieties in 2007-08. Production of both red and white wine grape varieties in warm climate regions is likely to remain constrained by continued shortages of irrigation water.

- Assuming average seasonal conditions, ABARE forecasts wine grape production in 2008-09 to be 1.78 million tonnes. This expectation is based on an average yield of 10.1 tonnes per hectare and incorporates the relatively small increases in bearing area from plantings that have occurred in the past three years. Production of red varieties is expected to be greater than that of white varieties, a return to the historical norm after the unusual predominance of white varieties in 2006-07. Continuing this trend, wine grape production is projected to reach 2.0 million tonnes in 2009-10.

### Production of wine grapes in Australia

|                          | estimated production |              | projected production |              |
|--------------------------|----------------------|--------------|----------------------|--------------|
|                          | 2006-07              | 2007-08      | 2008-09              | 2009-10      |
|                          | Kt                   | kt           | kt                   | kt           |
| <b>Premium white</b>     |                      |              |                      |              |
| Chardonnay               | 381                  | 413          | 419                  | 477          |
| Colombard                | 57                   | 51           | 52                   | 72           |
| Semillon                 | 77                   | 88           | 94                   | 103          |
| Other                    | 118                  | 145          | 155                  | 181          |
| Total                    | 633                  | 697          | 720                  | 833          |
| Non premium white        | 7                    | 7            | 7                    | 8            |
| <b>Premium red</b>       |                      |              |                      |              |
| Cabernet sauvignon       | 186                  | 255          | 274                  | 286          |
| Merlot                   | 95                   | 114          | 125                  | 138          |
| Shiraz                   | 286                  | 388          | 434                  | 467          |
| Other                    | 63                   | 76           | 79                   | 85           |
| Total                    | 630                  | 833          | 912                  | 976          |
| Non premium red          | 22                   | 27           | 27                   | 30           |
| <b>Total<sup>a</sup></b> | <b>1 397</b>         | <b>1 668</b> | <b>1 780</b>         | <b>1 998</b> |

<sup>a</sup> Total includes multipurpose and minor varieties not reported above.

# 1 Introduction

The rapid expansion of the Australian wine industry since the mid-1990s has been accompanied by significant industry development, characterised by a shift in focus from the domestic to export markets. In 2001-02 export sales exceeded domestic sales by volume. Currently they represent approximately twice domestic sales. Throughout this period, changing supply and demand conditions for both wine and grapes have resulted in challenging conditions for winemakers and grape growers alike.

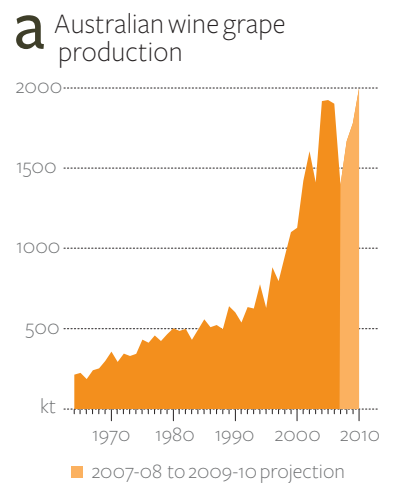
## Projections to 2009-10

The wine grape production estimates presented in this paper are part of a series of projections produced by ABARE since 1988 for the Grape and Wine Research and Development Corporation and its predecessor.

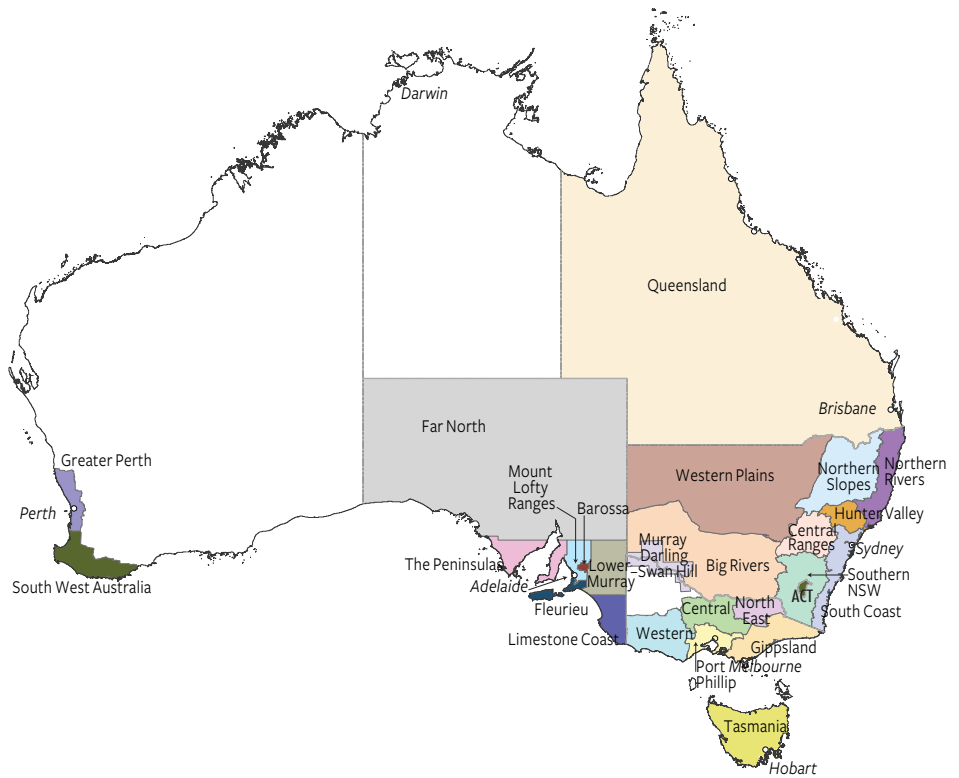
This report provides estimates of wine grape production in 2006-07, as well as projections of production in 2007-08, 2008-09 and 2009-10. Estimates of winery intake for each of the specialist wine grape varieties are also included for the 2006-07 vintage. Data on the production and use of multipurpose and minor varieties of grapes are also presented. The specific varieties of wine grapes in each of these categories are listed in table B2.

Readers will note the distinction made between warm and cool climate regions. The warm climate grape growing regions include the Riverland, Murray-Darling, Perricoota, Riverina and Swan Hill (table B1). These regions are characterised by a greater reliance on irrigation than cool climate regions, higher yields and generally lower grape prices.

Since 2006, ABARE has reported wine grape production using geographical indication (GI) regions as defined in the Register of Protected Names, which is maintained by the Australian Wine and Brandy Corporation. Production projections have been made for each GI region, and these estimates have been aggregated to the zone level (map 1) for the tables in appendix B. The data for each of the regions and zones are available on the ABARE website, [abare.gov.au](http://abare.gov.au).



map 1 Winegrape zones



## Industry growth and development

Following a series of record crops during the first part of this decade, wine grape stocks in Australia increased with an attendant decline in grape prices from 2000-01 to 2005-06. The relatively small size of the 2006-07 crop has, at least temporarily, ended this trend.

Reflecting the smaller crop, the quantity of grapes left on the vine or dropped on the ground slowed significantly in 2006-07. Following a 90 per cent increase in 2005-06, the area of red wine grapes left on the vine or dropped on the ground decreased by 33 per cent to 4715 hectares in 2006-07 (table 1). Similarly, after more than doubling in 2005-06, the area of white wine grapes left or dropped decreased by 28 per cent to 2229 hectares in 2006-07.

Based on average regional yields, the estimated quantity of grapes left on the vine in 2006-07 was 45 408 tonnes. The quantity of red wine grapes left on the vine in 2006-07 was down 64 per cent from 2005-06 to an estimated 26 723 tonnes, while the quantity of white grapes left on the vine decreased by 51 per cent to 18 685 tonnes.

# 1 Grapes left on the ground 2006-07

|                                   | red grapes |        | white grapes |        |
|-----------------------------------|------------|--------|--------------|--------|
|                                   | ha         | te     | ha           | te     |
| <b>South Australia</b>            |            |        |              |        |
| Barossa Valley                    | 69         | 274    | 49           | 331    |
| Mount Lofty Ranges                | 191        | 913    | 116          | 781    |
| Fleurieu                          | 176        | 1 013  | 36           | 278    |
| Limestone Coast                   | 1 001      | 3 854  | 251          | 1 760  |
| Lower Murray                      | 349        | 4 408  | 204          | 3 798  |
| Other                             | 20         | 74     | 3            | 20     |
| Total                             | 1 806      | 10 535 | 659          | 6 969  |
| <b>New South Wales and ACT</b>    |            |        |              |        |
| Hunter Valley                     | 226        | 719    | 161          | 823    |
| Big Rivers (excl. Murray-Darling) | 105        | 1 040  | 52           | 677    |
| Central Ranges                    | 327        | 1 878  | 156          | 1 096  |
| Rest of NSW                       | 214        | 897    | 136          | 788    |
| Total                             | 871        | 4 535  | 504          | 3 384  |
| <b>Greater Victoria</b>           |            |        |              |        |
| Central                           | 166        | 547    | 61           | 309    |
| North East                        | 353        | 1 504  | 189          | 859    |
| Port Phillip                      | 220        | 740    | 106          | 461    |
| Rest of Victoria                  | 257        | 642    | 74           | 207    |
| Total                             | 995        | 3 432  | 430          | 1 836  |
| Murray-Darling – Swan Hill        | 438        | 5 972  | 336          | 4 786  |
| Western Australia                 | 428        | 1 860  | 206          | 1 383  |
| Tasmania                          | 37         | 154    | 33           | 136    |
| Queensland                        | 140        | 236    | 61           | 191    |
| Grand Total                       | 4 715      | 26 723 | 2 229        | 18 685 |

e ABARE estimate.

## Wine grape prices

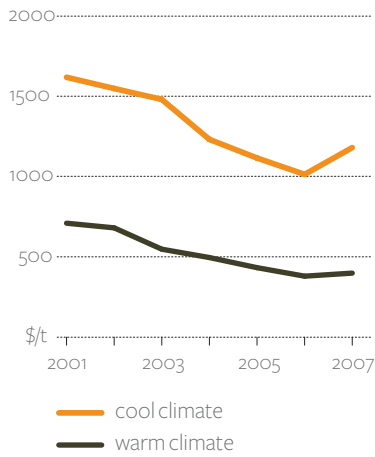
Reflecting the reduced availability of grapes and solid demand from wineries, in 2006-07 average wine grape prices across Australia increased appreciably for the first time in four years. Red wine grape prices increased by 14 per cent in cool climate regions and 4 per cent in warm climate regions (figure b). Primarily because of the smaller reduction in grape production in 2006-07, white wine grape prices increased to a smaller extent, up 7 per cent and 2 per cent in cool and warm climate regions respectively (figure c).

Using data from the National Utilisation Project (NUP), an average price per tonne of wine grapes can be calculated by variety and region. On average, in 2006-07 red wine grape prices were \$1181 per tonne and \$399 per tonne in

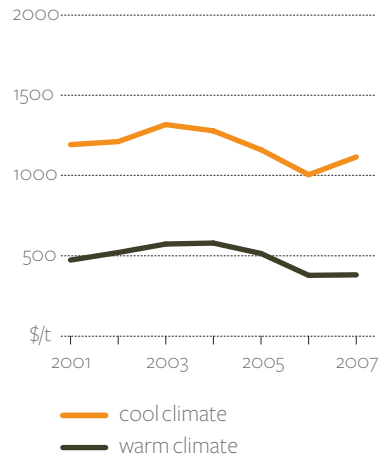
cool and warm climate regions, respectively. White wine grape prices were \$1116 and \$382 in cool and warm climate regions respectively.

There was significant variation in prices across varieties and regions. For example, the weighted average price of shiraz was \$1600 in the Adelaide Hills region and \$424 in the Riverina region. Similarly, the weighted average price of chardonnay was \$2634 in the Tasmania region and \$395 in the Riverland region.

**b** Average Australian red wine grape price



**c** Average Australian white wine grape price



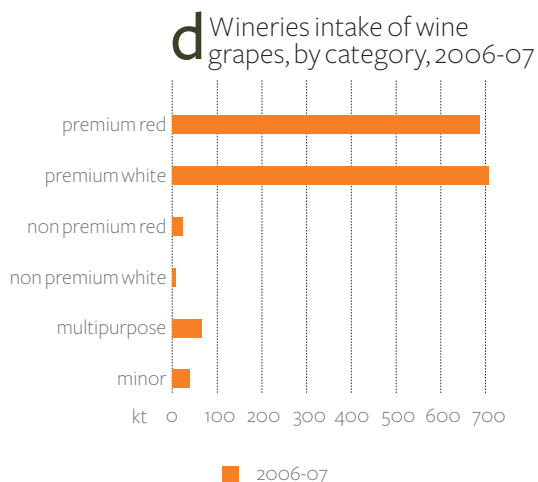
# 2 Wine grape supply 2006-07 and projections to 2009-10

## Wine grape production in 2006-07

Australian wine grape production in 2006-07 is estimated to have been 1.40 million tonnes (table 2), 27 per cent less than the 2005-06 vintage. Widespread drought conditions across much of south-eastern Australia was the major cause of this outcome, as were frosts at crucial times in the growing period and the effects of bushfire smoke taint. Yields in cool climate regions were mostly affected by these factors. Production in warm climate regions was mainly reduced as a result of the lower availability of irrigation water.

Production of premium red wine grapes fell more than that of white wine grapes in 2006-07, reflecting the predominance of red varieties in cool climate regions where production reductions were greatest. As a result, total production of white wine grapes in 2006-07 was greater than the production of red wine grapes for the first time since 1998-99. In total, 723 000 tonnes of white wine grapes and 674 000 tonnes of red wine grapes were produced. The average wine grape yield across Australia was 11.1 tonnes per hectare for white grapes compared with 6.9 tonnes per hectare for red grapes.

The main white wine grape variety produced in 2006-07 was chardonnay, replacing shiraz as the highest volume variety produced in Australia. Approxi-



mately 381 000 tonnes of chardonnay were produced in 2006-07. This was the result of a relatively small decrease in production (10 per cent) from the previous season, and a 2 per cent increase in bearing area to 31 900 hectares (table 3). Production of semillon, colombard and riesling declined by approximately 25 per cent from 2005-06, while production of sauvignon blanc decreased by 8 per cent. These reductions resulted primarily from lower yields related to adverse conditions rather than reductions in bearing area.

Despite a 37 per cent decrease in production to 286 000 tonnes, in 2006-07 shiraz remained the most-produced red wine grape variety. Cabernet sauvignon production was reduced by approximately the same percentage to 186 000 tonnes. Production of merlot fell by 27 per cent to 95 000 tonnes. All these reductions were primarily the result of lower yields, as bearing areas remained relatively static or increased slightly in 2006-07 (table 3). Other red varieties such as pinot noir and ruby cabernet also recorded significant declines in production during 2006-07.

In line with yield declines for premium wine grape varieties, the crush of multipurpose grapes for wine production declined by 6 per cent in 2006-07 to 65 000 tonnes (table 2). The bearing area of minor varieties such as viognier and tempranillo continued to rise in 2006-07, up 32 per cent to 4 800 hectares (table 3). Overall, production of these grapes remained a small proportion (3 per cent) of total Australian production.

## Wine grape production 2007-08

Total wine grape production in 2007-08 is estimated to reach approximately 1.67 million tonnes, which is an increase of 19 per cent from 2006-07. The recovery is dependent on higher yields, particularly in cool climate regions, following an improvement in seasonal conditions. Continuing drought conditions are again expected to constrain production in warm climate regions. Water allocations have generally been low throughout the 2007-08 growing season; however, water purchases from other regions have helped to mitigate effects on production to some extent.

Production of red grape varieties in 2007-08 is forecast to increase by 31 per cent (table 2) to 884 000 tonnes, mostly because of an improvement in yields, as the forecast bearing area increased minimally (1 per cent). Although the 2008 harvest was still in progress at the time these forecasts were prepared, it seems likely yields will hold up unless there are severe weather conditions in key areas as harvesting draws to a conclusion. Shiraz production is forecast to rise by 35 per cent, cabernet sauvignon by 37 per cent and merlot by 19 per cent relative to outcomes in 2006-07.

Production of white grape varieties is expected to increase in 2007-08, but by less than red grapes, primarily because relatively more of these grapes are grown in warm climate regions. With reduced water availability, a smaller

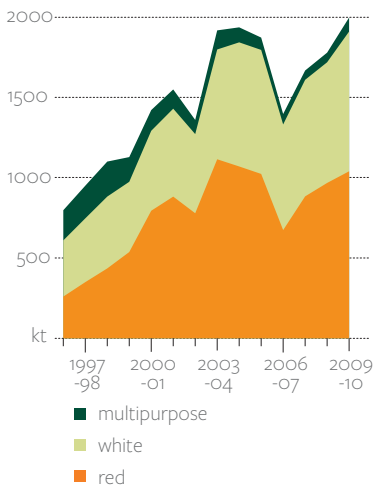
## 2 Estimated and projected wine grape production in Australia, by variety

|                          | estimated production |         | projected production |         |
|--------------------------|----------------------|---------|----------------------|---------|
|                          | 2006-07              | 2007-08 | 2008-09              | 2009-10 |
|                          | kt                   | Kt      | kt                   | kt      |
| <b>Premium White</b>     |                      |         |                      |         |
| Chardonnay               | 381                  | 413     | 419                  | 477     |
| Chenin Blanc             | 8                    | 9       | 9                    | 10      |
| Colombard                | 57                   | 51      | 52                   | 72      |
| Muscadelle               | 1                    | 1       | 1                    | 1       |
| Pinot Gris               | 14                   | 21      | 27                   | 34      |
| Riesling                 | 32                   | 39      | 39                   | 42      |
| Sauvignon Blanc          | 40                   | 49      | 51                   | 63      |
| Semillon                 | 77                   | 88      | 94                   | 103     |
| Traminer                 | 9                    | 10      | 10                   | 11      |
| Verdelho                 | 15                   | 17      | 17                   | 18      |
| Total                    | 633                  | 698     | 720                  | 833     |
| <b>Non premium White</b> |                      |         |                      |         |
| Crouchen                 | 2                    | 2       | 2                    | 2       |
| Doradillo                | 2                    | 2       | 2                    | 2       |
| Palomino                 | 1                    | 1       | 1                    | 1       |
| Trebbiano                | 3                    | 3       | 3                    | 3       |
| Total                    | 7                    | 7       | 7                    | 8       |
| <b>Premium Red</b>       |                      |         |                      |         |
| Cabernet Franc           | 3                    | 4       | 4                    | 4       |
| Cabernet Sauvignon       | 186                  | 255     | 274                  | 286     |
| Malbec                   | 2                    | 3       | 3                    | 3       |
| Merlot                   | 95                   | 114     | 125                  | 138     |
| Petit Verdot             | 15                   | 17      | 18                   | 20      |
| Pinot Noir               | 28                   | 36      | 37                   | 39      |
| Ruby Cabernet            | 15                   | 16      | 17                   | 18      |
| Shiraz                   | 286                  | 388     | 434                  | 467     |
| Total                    | 631                  | 832     | 912                  | 976     |
| <b>Non premium red</b>   |                      |         |                      |         |
| Grenache                 | 16                   | 19      | 20                   | 22      |
| Mataro                   | 7                    | 8       | 8                    | 8       |
| Total                    | 22                   | 27      | 27                   | 30      |
| Multipurpose             | 65                   | 58      | 60                   | 87      |
| Minor Varieties          | 39                   | 47      | 53                   | 63      |
| <b>Wine Grapes Total</b> |                      |         |                      |         |
| Red                      | 674                  | 884     | 967                  | 1040    |
| White                    | 723                  | 784     | 811                  | 958     |
| Total                    | 1397                 | 1668    | 1780                 | 1998    |

### 3 Wine grape bearing areas in Australia, selected varieties

|                    | estimated        |                  | projected        |                  |
|--------------------|------------------|------------------|------------------|------------------|
|                    | 2006-07<br>000ha | 2007-08<br>000ha | 2008-09<br>000ha | 2009-10<br>000ha |
| Premium white      |                  |                  |                  |                  |
| Chardonnay         | 32               | 32               | 33               | 33               |
| Colombard          | 3                | 3                | 3                | 3                |
| Pinot Gris         | 2                | 2                | 2                | 2                |
| Riesling           | 4                | 4                | 5                | 5                |
| Sauvignon Blanc    | 5                | 5                | 5                | 6                |
| Semillon           | 6                | 6                | 7                | 7                |
| Total              | 55               | 56               | 57               | 59               |
| Non premium white  | 0.5              | 0.5              | 0.5              | 0.5              |
| Premium red        |                  |                  |                  |                  |
| Cabernet Sauvignon | 29               | 29               | 29               | 29               |
| Merlot             | 12               | 12               | 12               | 13               |
| Petit Verdot       | 1                | 1                | 1                | 1                |
| Pinot Noir         | 5                | 5                | 5                | 5                |
| Ruby Cabernet      | 1                | 1                | 1                | 1                |
| Shiraz             | 43               | 43               | 44               | 44               |
| Total              | 92               | 93               | 94               | 95               |
| Non premium red    | 3                | 3                | 3                | 3                |
| Multipurpose       | 8                | 8                | 8                | 8                |
| Minor Varieties    | 5                | 5                | 5                | 6                |
| Total              | 163              | 165              | 168              | 171              |

e Australian wine grape production, by category



improvement in yields is expected in these areas. Production of chardonnay, the main white wine grape variety, is expected to increase by 8 per cent from 2006-07, while bearing area is expected to increase by 2 per cent to 32 400 hectares. Production of semillon is expected to increase by 15 per cent.

### Projected wine grape production in 2008-09 and 2009-10

Wine grape production in 2008-09 is forecast to be 1.78 million tonnes. This projection incorporates an expectation of continuing difficulties in securing enough irrigation water in warm climate production areas. Current storage levels of reservoirs in the major irrigation systems suggest initial water allocations in 2008-09 will be similar to those of 2007-08. For 2008-09, average yield is forecast to be 10.6 tonnes per hectare and bearing area to be 168 000 hectares.

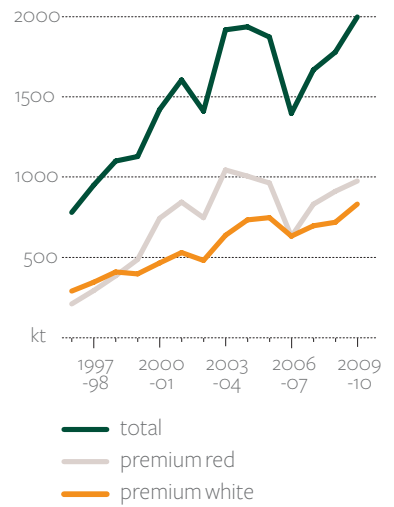
Assuming a return to average seasonal conditions in 2009-10, wine grape production is forecast to reach 2.0 million tonnes. This forecast represents a 43 per cent increase from the drought-reduced crop of 2006-07 and a 20 per cent increase from estimated production in 2007-08. Based on an expected bearing area in 2009-10 of 170 600 hectares, this implies an average yield of 11.7 tonnes per hectare. Production in 2009-10 is projected to be 5 per cent higher than in 2005-06. Yields in 2005-06 averaged 12.3 tonnes per hectare.

In total, production of wine grapes is forecast to increase by 7 per cent from 2007-08 to 2008-09, reflecting the relatively slow recovery from the drought. From 2008-09 to 2009-10, the rate of production growth is projected to increase to 12 per cent, assuming a return to average seasonal conditions.

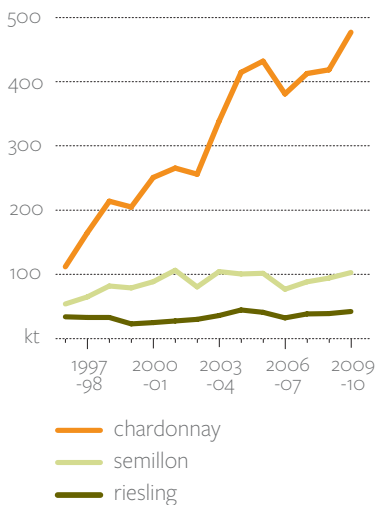
Over the period 2007-08 to 2009-10, overall production of red wine grapes is expected to be greater than that of white wine grapes. This expectation reflects the larger bearing area of red wine grapes in Australia, notwithstanding the generally lower yields of red wine grape varieties.

Shiraz is expected to regain its place as the highest-production grape variety in 2008-09, replacing chardonnay, which was dominant during the 2006-07 and 2007-08 seasons. The dominance of chardonnay in those years primarily reflects adverse seasonal conditions, which had a disproportionate impact on red wine grape production, as well as the relatively large plantings of chardonnay that occurred in the early part of the decade. Because of these plantings, chardonnay is projected to be the most-produced wine grape variety in Australia in 2009-10.

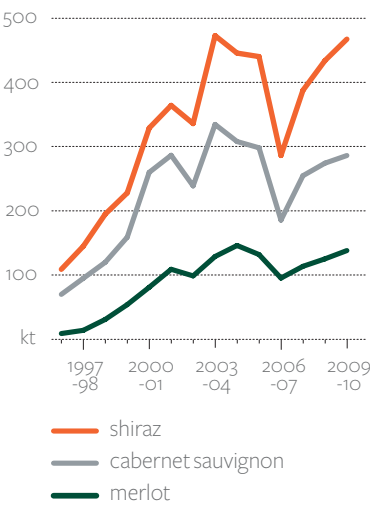
**f** Australian premium and total wine grape production



**g** Australian production of selected white varieties



**h** Australian production of selected red varieties



## Estimated and projected production, by zone

Wine grapes are grown in all states and territories of Australia other than the Northern Territory. South Australia is the dominant wine-producing state, accounting for 45 per cent of total production. This section summarises production estimates and projections by zone. Detailed production projections for each zone and variety given in appendix B. Projections for each geographical indication (GI) region are available from the ABARE website, [www.abare.gov.au](http://www.abare.gov.au).

### 4 Specialist wine grape production in Australia by zone

|                                   | estimated |         | projected |         |
|-----------------------------------|-----------|---------|-----------|---------|
|                                   | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
|                                   | kt        | kt      | kt        | kt      |
| <b>South Australia</b>            |           |         |           |         |
| Barossa a                         | 54        | 97      | 98        | 99      |
| Mount Lofty Ranges a              | 47        | 59      | 63        | 64      |
| Fleurieu a                        | 84        | 117     | 134       | 131     |
| Limestone Coast a                 | 86        | 155     | 175       | 180     |
| Lower Murray                      | 302       | 310     | 336       | 391     |
| Other                             | 1         | 2       | 2         | 2       |
| Total                             | 574       | 740     | 808       | 867     |
| <b>New South Wales and ACT</b>    |           |         |           |         |
| Hunter Valley a                   | 18        | 24      | 24        | 25      |
| Big Rivers (excl. Murray Darling) | 216       | 252     | 284       | 304     |
| Central Ranges a                  | 42        | 68      | 63        | 65      |
| Rest of NSW and ACT a             | 12        | 18      | 19        | 19      |
| Total                             | 288       | 362     | 391       | 413     |
| <b>Greater Victoria</b>           |           |         |           |         |
| Central a                         | 17        | 29      | 30        | 30      |
| North East a                      | 11        | 18      | 20        | 22      |
| Port Phillip a                    | 14        | 18      | 20        | 20      |
| Rest of Victoria a                | 3         | 6       | 7         | 7       |
| Total                             | 44        | 71      | 77        | 79      |
| Murray Darling - Swan Hill        | 315       | 294     | 299       | 395     |
| Western Australia a               | 66        | 84      | 77        | 79      |
| Tasmania a                        | 5         | 7       | 8         | 9       |
| Queensland a                      | 2         | 5       | 7         | 7       |
| Total specialist wine grapes      | 1 293     | 1 563   | 1 667     | 1 848   |

a Cool climate region.

Production in 2007-08 is expected to increase in all states and the ACT relative to the 2006-07 vintage. South Australian production is estimated to recover by 28 per cent, which is a larger improvement than for other states. This reflects the predominance of cool climate grapes in South Australia. By contrast, production in the warm climate Murray-Darling – Swan Hill region is estimated to fall 7 per cent from 2006-07 to 2007-08 because of continuing drought conditions.

The ongoing effects of the drought in eastern Australia are again expected to influence wine grape production in 2008-09, particularly in the warm climate regions of New South Wales and Victoria, which are heavily reliant on irrigation water. Significantly above-average system inflows will be required in the short term for irrigation water allocations to return to their historical average, and there is little evidence of this occurring at this stage.

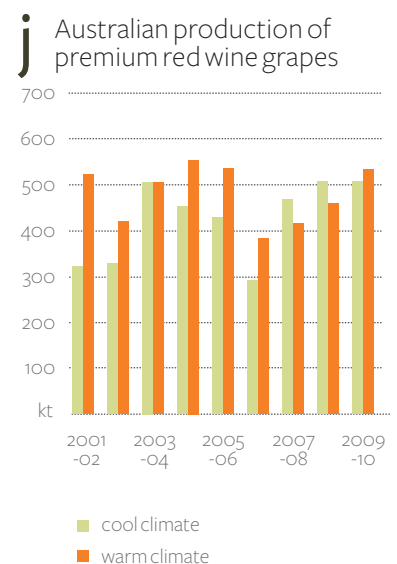
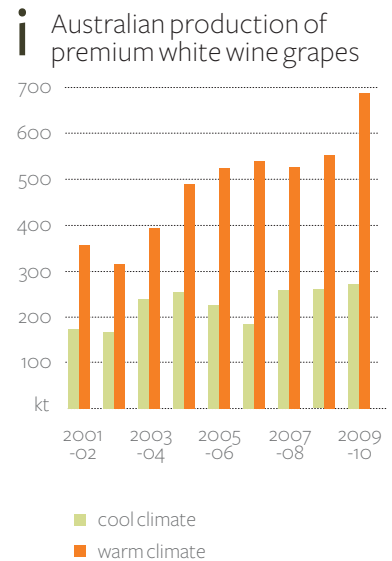
## Production in cool and warm climate regions

Under normal seasonal conditions, wine grape production in warm climate regions generally accounts for 60 per cent of total Australian production. In these regions, white wine grape varieties are generally predominant, accounting for 55 per cent of total production on average. In cool climate regions, red grape varieties are predominant, representing 65 per cent of total production.

In 2006-07, cool climate regions generally experienced poorer growing conditions than warm climate regions. In 2007-08 this situation was reversed as seasonal conditions in cool climate regions improved but irrigation water allocations remained low in warm climate regions. Accordingly, in 2007-08, production of red wine grape varieties is expected to exceed that of white varieties, a return to the situation observed in every year since 1999-00 other than 2006-07.

Further illustrating the reversal of fortunes for cool versus warm regions in 2007-08, production of red wine grape varieties is estimated to rebound by 61 per cent in cool climate regions and 8 per cent in warm climate regions. Reflecting the smaller extent to which white wine grapes were affected in 2006-07, the estimated increases in production of white wine grape varieties are smaller, with production up 41 per cent in cool climate regions. With continued drought conditions, white wine grape production is estimated to be 3 per cent lower in warm climate regions in 2007-08.

Of the projected record 2 million tonnes of wine grape production in 2009-10, around 1.2 million tonnes is estimated to be from warm climate regions, and 0.8 million tonnes from cool climate regions.



# 3 Wineries' required intake of wine grapes to 2009-10

Demand for wine grapes is estimated by assessing winery requirements. Estimates of required winery intake are collected annually by the Australian Wine and Brandy Corporation (AWBC) as part of the National Utilisation Project. These estimates are published in the 2007 Australian Regional Wine Grape Crush Survey. The survey incorporates winemakers' contractual arrangements and expected future grape purchases, as well as estimates of demand for Australian wine in domestic and export markets.

Historically, the survey requested winemakers' estimates of preferred and expected wine grape intake. Because the total supply of wine grapes has recently been sufficient to meet demand, this differentiation is no longer necessary. Reflecting this more recent view, winemakers are now asked to provide estimates of committed and required intakes. The quantity of wine grapes demanded by wineries in a particular season is most accurately reflected by required intake and is comparable to the historical estimates of preferred intake.

## Required intake by wineries, 2007-08 to 2009-10

The estimate of required intake in the survey is the quantity of grapes wineries need to crush in order to achieve sales forecasts, taking into account seasonal conditions and grape availability. For this reason required intake is not a true demand forecast but one that is moderated by expected availability of wine grapes.

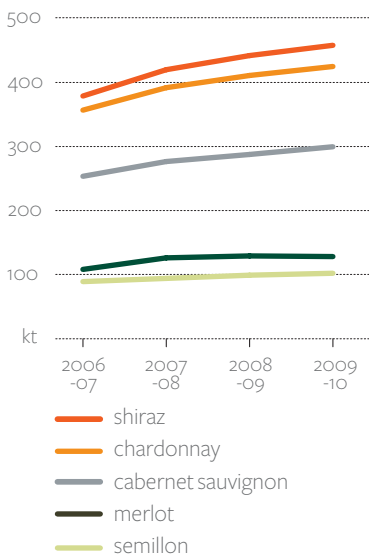
In 2007-08, the required intake of grapes by wineries is expected to be 1.81 million tonnes, an increase of 35 per cent from the 2006-07 crush of 1.34 million tonnes (table 5). In line with expected production changes, the expected increase in the intake of premium red grape varieties (51 per cent) is greater than the expected increase in the intake of premium white grape varieties (19 per cent).

The required intake of wine grapes is expected to increase to 1.91 million tonnes in 2008-09 and 1.97 million tonnes in 2009-10. These expectations are based on a return to 'average' seasonal conditions, and clearly, if conditions similar to those of 2006-07 are repeated, intake quantities will be reduced.

## 5 Actual and required intake in Australia, by variety

|                          | actual Intake |               | projected required intake |               |               | change<br>2007-08 to<br>2009-10<br>% |
|--------------------------|---------------|---------------|---------------------------|---------------|---------------|--------------------------------------|
|                          | 2005-06<br>kt | 2006-07<br>kt | 2007-08<br>kt             | 2008-09<br>kt | 2009-10<br>kt |                                      |
| <b>Premium white</b>     |               |               |                           |               |               |                                      |
| Chardonnay               | 422           | 373           | 391                       | 410           | 424           | 8                                    |
| Chenin blanc             | 11            | 8             | 10                        | 10            | 10            | 0                                    |
| Colombard                | 79            | 56            | 73                        | 82            | 84            | 15                                   |
| Muscadelle               | 1             | 0             | 0                         | 0             | 0             | 0                                    |
| Pinot gris               | 9             | 14            | 33                        | 46            | 50            | 52                                   |
| Riesling                 | 40            | 31            | 36                        | 37            | 38            | 6                                    |
| Sauvignon blanc          | 41            | 39            | 74                        | 82            | 86            | 16                                   |
| Semillon                 | 100           | 76            | 94                        | 99            | 102           | 9                                    |
| Traminer                 | 11            | 8             | 10                        | 10            | 11            | 10                                   |
| Verdelho                 | 18            | 14            | 16                        | 17            | 17            | 6                                    |
| Total                    | 733           | 619           | 737                       | 793           | 822           | 12                                   |
| <b>Non premium white</b> |               |               |                           |               |               |                                      |
| Crouchen                 | 2             | 2             | 2                         | 2             | 2             | 0                                    |
| Doradillo                | 2             | 2             | 2                         | 2             | 2             | 0                                    |
| Palomino                 | 1             | 0             | 0                         | 0             | 0             | 0                                    |
| Trebbiano                | 4             | 3             | 2                         | 2             | 2             | 0                                    |
| Total                    | 9             | 7             | 6                         | 6             | 6             | 0                                    |
| <b>Premium red</b>       |               |               |                           |               |               |                                      |
| Cabernet franc           | 3             | 2             | 2                         | 2             | 2             | 0                                    |
| Cabernet sauvignon       | 296           | 176           | 276                       | 287           | 299           | 8                                    |
| Malbec                   | 4             | 2             | 2                         | 2             | 2             | 0                                    |
| Merlot                   | 130           | 91            | 126                       | 129           | 128           | 2                                    |
| Petit verdot             | 25            | 14            | 15                        | 14            | 14            | -7                                   |
| Pinot noir               | 32            | 26            | 51                        | 54            | 56            | 10                                   |
| Ruby cabernet            | 27            | 15            | 14                        | 15            | 15            | 7                                    |
| Shiraz                   | 435           | 275           | 419                       | 441           | 457           | 9                                    |
| Total                    | 951           | 600           | 905                       | 944           | 973           | 8                                    |
| <b>Non premium red</b>   |               |               |                           |               |               |                                      |
| Grenache                 | 23            | 15            | 21                        | 22            | 22            | 5                                    |
| Mataro                   | 11            | 6             | 5                         | 5             | 5             | 0                                    |
| Total                    | 34            | 21            | 26                        | 27            | 27            | 4                                    |
| Multipurpose             | 61            | 57            | 71                        | 72            | 71            | 0                                    |
| Minor varieties          | 41            | 34            | 67                        | 70            | 70            | 4                                    |
| Total                    | 1844          | 1338          | 1812                      | 1912          | 1969          | 9                                    |

**k** Required intake of selected varieties in Australia



Total required intake of red wine grapes is expected to increase by 7 per cent from 2007-08 to 2009-10. Increases in the intake of major varieties such as shiraz (9 per cent) and cabernet sauvignon (8 per cent) will be the major drivers of this increase. Total required intake of white wine grape varieties is expected to increase by 10 per cent, driven by chardonnay (8 per cent), semillon (9 per cent) and sauvignon blanc (17 per cent).

Reflecting the impact of drought conditions, the projected intake of multipurpose grapes is expected to decline by 10 per cent to 70 577 tonnes in 2007-08. Over the period 2007-08 to 2009-10, overall intake of multipurpose grapes is expected to remain relatively flat. Recently, production of some minor varieties such as viognier and tempranillo has increased dramatically in some regions of Australia (AWBC 2008). In absolute terms, however, production of these varieties remains relatively small.

## Projection procedure

The projections of wine grape production contained in this report are generated from estimates of yields and wine grape bearing areas. Projections are made for up to 47 different varieties of wine grapes in each of 89 wine regions in Australia. These wine regions are defined by the Australian Bureau of Statistics (ABS), which collects detailed statistics on the Australian grape growing industry each year from wine grape growers (ABS 2007). The annual ABS wine grape census collection provides information about the current state of Australian viticulture that is integral to the projections of future wine grape production reported here.

As part of the wine grape census, the ABS collects data for each grape variety on the grape bearing area, non-bearing area and the quantity harvested for specific purposes such as wine making and drying. Information is also obtained about the amount of the non-bearing area that was planted or grafted-on in the previous twelve months as well as the non-bearing area that was non-bearing for more than a year.

As grapes are perennial, the bearing area of grapes next year is determined mostly by the area of grape vines that are currently bearing fruit. It is also affected by the area of grapes planted or grafted-on in previous years that will bear fruit next year (a portion of the current non-bearing area). In addition, it is possible that growers might take grape vines permanently out of production between the current and next year's harvest, which is a practice known as grubbing.

Based on this intertemporal relationship, the following model is used to estimate future production:

$$G_i \text{proj}_{t+1} = (BA_{i,t} + PL_i \text{proj}_{t-k} - RM_i \text{proj}_{t+1}) * Y_i \text{proj}_{t+1}$$

$G_i \text{proj}_{t+1}$  represents projected production of grape variety  $i$ , next year;  $BA_{i,t}$  is the current bearing area;  $PL_i \text{proj}_{t-k}$  is the portion of the current non-bearing area that was planted or grafted-on in an earlier year  $t-k$ , but is projected to be bearing next harvest ( $k=3$  for warm climate regions and  $k=4$  for cool climate regions);  $RM_i \text{proj}_{t+1}$  is the projected area of vines of grape variety  $i$  that will be removed or grubbed next year, and  $Y_i \text{proj}_{t+1}$  is the estimate of next year's yield per hectare for wine grape variety  $i$ . The portion of the current non bearing area that is expected to come into bearing in the future

is determined by estimating an age profile of the current non-bearing area that is more than one year old — that is, the area that was not planted (or grafted-on) last year.

The age profile of the non-bearing area that is two years of age and older is assumed to reflect the relative size of new plantings (and grafting-on) over recent years. For the cool climate regions it is assumed that it takes four years for newly planted vines to reach a commercially bearing age, while in the warm inland regions it is assumed to take three years. Hence, for warm climate regions, for example, the proportion of each variety planted two, three and four years ago of total plantings over that period is used to apportion the total non-bearing area that is currently reported to be at least two years old. The apportioned areas provide estimates of  $PL_i proj_{t,k}$ , the areas that are to become bearing in the future. For cool climates the plantings of each variety two, three, four and five years previously would be used in a similar manner to that for the warm climate regions to determine the additions to bearing area in the future.

Ideally, the area grubbed next year should be subtracted from the bearing area. However, given the very small area of grapes that have historically been grubbed or grafted-off according to ABS data, and that future decisions by growers to grub are too difficult to estimate with any objectivity, they were assumed to be zero and excluded from the projections model.

According to the model provided above, estimated wine grape production for each variety in 2007-08 is calculated as the sum of 2006-07 bearing area and the portion of non-bearing area reported in 2006-07 that is expected to reach commercial bearing in 2007-08 (four years old in cool climate and three years old in warm climate regions), multiplied by the projected yield in 2007-08. To forecast grape production for the following year, 2008-09, the area expected to become bearing in 2008-09 is added to the estimate of the bearing area in 2007-08 and the total area multiplied by the projected yield.

## Calibration

While the ABS viticulture census is the only official source of statistics on grape bearing area, there are other sources that report estimates of wine grape production. For example, while the viticulture census collects data on grape production for wine making from growers, the Australian Regional Wine Grape Crush Survey collects estimates from the wineries of the quantity of grapes crushed for winemaking, by variety and 'geographical indication' (GI) region. This survey is conducted under the National Utilisation Project (NUP) and coordinated by the Australian Wine and Brandy Corporation. The 'geographical indication' is the official industry description that is similar to the 'appellation' system used in Europe but less restrictive in terms of viticultural and winemaking practices.

Before 2006-07 the NUP estimate of the Australian wine grape crush was consistently higher than production estimates reported by the ABS viticulture census. The NUP is regarded by the wine industry to be the more accurate measure of wine grape production. Because of this, the ABS bearing areas have historically been calibrated to ensure that wine grape production is equal to the NUP estimate of wine grape production. However, because of changes in coverage, the production estimate reported by the ABS viticulture census in 2006-07 was 2 per cent higher than the NUP intake estimate.

From 2006-07 there has been a general consensus that the ABS data are now more accurate than the NUP estimates. Hence, for this year, ABARE has used the ABS data as the benchmark for production of each variety of wine grapes in GI regions where there is a large discrepancy between the ABS and the NUP. Therefore, in this report, where the ABS and NUP report production of a grape variety in a GI region, the historical ABS bearing area data ( $BA_{i,t}$ ) is calibrated to ensure that wine grape production by variety in each region is equal to the ABS viticultural census figure. In cases where individual grape varieties are recorded by the ABS in a GI region but are missing in the NUP, the original ABS bearing areas are included in the projection model.

In contrast, the ABS statistics for non-bearing area and plantings plus grafted-on area are not calibrated to either the NUP or ABS production data because they do not affect the current bearing area. Hence, non-bearing area is unrelated to the ABS or NUP estimates of current production or winery intake.

The production of multipurpose and minor variety grapes (see tables) are estimated rather than model generated. Production is estimated by the required intake by wineries for each grape variety in every GI region as reported in the Australian Regional Wine grape Crush Survey. This is done because multipurpose and minor grape varieties are commonly used for purposes other than making wine and therefore model projections of the production of these types of grapes would typically far exceed their use for wine. Consequently, estimates provided by wineries of their requirements for multipurpose and minor grape varieties are considered to provide more accurate estimates of their production for wine making. These estimates more closely reflect expected demand for such grapes. In effect, this approach is based on the assumption that the quantity of multipurpose and minor grapes available for other purposes, such as drying and fresh table sales, is a residual after winery demand for multipurpose grapes is met.

## Yields

Industry experts provided the yields that were used to project production. Historical yield data for each variety of grape for the previous five harvests and the average yield for that five-year period were provided as base information to the industry experts for every ABS region of relevance. These experts then provided their own estimates of yield for the 2007-08 harvest and each of the projection years on the assumption that there would be average winter rainfall in their regions and irrigation catchment areas following the 2008 harvest. It was not uncommon for industry experts to expect the yields at the end of the projection period to be similar to the five-year average yield.

## Aggregation of regional projections

For reporting purposes, the projections of wine grape production are presented at the national, GI zone and regional levels. The vast majority of ABS regions are identical to the GI regions but in some cases the ABS collects data at a more disaggregated subregional level, particularly where GI regions or zones cross state borders.

In these instances, ABS region projections were aggregated to the GI region (zone) level. In some instances, such as for the Murray-Darling – Swan Hill GI, the GI zone is also the region. As a result, the 89 ABS regions used in the projections model, become aggregated into 83 GI regions (zones). The tables for wine grape production for each of the 27 GI zones that are presented in appendix B are simply aggregations of the projections generated at the GI region (zone) level. Projections of wine grape production, by variety, for each of the 83 GI regions can be accessed from ABARE's website, [abare.gov.au](http://abare.gov.au).

Table B1 lists the GI zones in each state, and the regions within each zone. Table B2 lists the wine grape varieties included in these projections. Wine grape production for each of the 27 GI zones is presented in appendix B3. Queensland, Tasmania and the ACT each have only one zone and one region. The Murray Darling – Swan Hill zone lies in both Victoria and New South Wales.

# B Wine grape production, by variety and zone

## B1 Wine grape zones and regions of Australia

| zone                                                  | Region                            |                                                                                        |
|-------------------------------------------------------|-----------------------------------|----------------------------------------------------------------------------------------|
| <b>Murray Darling – Swan Hill<br/>New South Wales</b> | Murray Darling – Swan Hill        |                                                                                        |
|                                                       | Big Rivers (excl. Murray Darling) | Perricoota/Riverina/other                                                              |
|                                                       | Western Plains                    | Western Plains                                                                         |
|                                                       | Central Ranges                    | Cowra/Mudgee/Orange/other                                                              |
|                                                       | Southern NSW                      | Canberra District/Gundagai/Tumbarumba/Hilltops/<br>other                               |
|                                                       | South Coast                       | Shoalhaven Coast/Southern Highlands/other                                              |
| <b>Queensland</b>                                     | Northern Slopes                   | Northern Slopes                                                                        |
|                                                       | Northern Rivers                   | Hastings River/other                                                                   |
|                                                       | Queensland                        | Granite Belt/South Burnett/other                                                       |
| <b>Greater Victoria</b>                               | North East Victoria               | Alpine Valleys/Beechworth/Glenrowan/Rutherglen<br>other                                |
|                                                       | Central Victoria                  | Bendigo/Goulburn Valley/Heathcote/Strathbogie<br>Ranges/Upper Goulburn/other           |
|                                                       | Western Victoria                  | Grampians/Henty Pyrenees/other                                                         |
|                                                       | Port Phillip                      | Geelong Macedon Ranges/Mornington Peninsula/<br>Sunbury/Yarra Valley/other             |
|                                                       | Gippsland                         | Gippsland                                                                              |
| <b>South Australia</b>                                | Mount Lofty Ranges                | Adelaide Hills/Adelaide Plains/Clare Valley/other                                      |
|                                                       | Barossa                           | Barossa Valley/Eden Valley/other                                                       |
|                                                       | Fleurieu                          | Currency Creek/Kangaroo Island/Langhorne Creek<br>McLaren Vale/Southern Fleurieu/other |
|                                                       | Limestone Coast                   | Coonawarra/Mount Benson/Padthaway/Wrattonbully<br>other                                |
|                                                       | Lower Murray                      | Riverland/other                                                                        |
|                                                       | The Peninsulas                    | The Peninsulas                                                                         |
| <b>Western Australia</b>                              | Far North                         | Southern Flinders Ranges                                                               |
|                                                       | Greater Perth                     | Perth Hills/Swan District/Peel/ other                                                  |
|                                                       | South West Australia              | Blackwood Valley/Geographe/Great Southern<br>Margaret River/other                      |
| <b>Tasmania</b>                                       | WA/other                          | WA/other                                                                               |
|                                                       | Tasmania                          | Tasmania                                                                               |
| <b>Australian Capital Territory</b>                   | Australian Capital Territory      | Australian Capital Territory                                                           |

## B2 Australian wine grape categories

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### Premium red

Cabernet franc  
 Cabernet sauvignon  
 Malbec  
 Merlot  
 Petit verdot  
 Pinot noir  
 Ruby cabernet  
 Shiraz

### Non premium red

Grenache  
 Mataro

### Minor red

Meunier  
 Muscat a petit grains rouge  
 Tarrango  
 Barbera  
 Carignan  
 Nebbiolo  
 Sangiovese  
 Touriga  
 Durif  
 Tempranillo  
 Zinfandel

### Premium white

Chardonnay  
 Chenin blanc  
 Colombard  
 Muscadelle  
 Pinot gris  
 Riesling  
 Sauvignon blanc  
 Semillon  
 Traminer  
 Verdelho

### Non premium white

Crouchen  
 Doradillo  
 Palomino  
 Trebbiano

### Minor white

Marsanne  
 Muscat a petit grains blanc  
 Viognier

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## B3 Wine grape production - Murray Darling - Swan Hill zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 146       | 141     | 141       | 168     |
| Cabernet sauvignon         | 39 376    | 42 815  | 42 844    | 47 329  |
| Malbec                     | 15        | 15      | 15        | 65      |
| Merlot                     | 28 638    | 27 134  | 27 177    | 34 612  |
| Petit verdot               | 2 562     | 2 555   | 2 555     | 2 982   |
| Pinot noir                 | 1 970     | 1 905   | 1 910     | 2 398   |
| Ruby cabernet              | 2 646     | 2 783   | 2 783     | 3 176   |
| Shiraz                     | 51 978    | 52 944  | 53 096    | 69 677  |
| Total                      | 127 334   | 130 294 | 130 524   | 160 410 |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 133 805   | 113 087 | 113 702   | 148 735 |
| Chenin blanc               | 861       | 707     | 712       | 976     |
| Colombard                  | 22 720    | 16 992  | 17 171    | 29 774  |
| Muscadelle (Tokay)         | 107       | 92      | 92        | 126     |
| Pinot gris                 | 4 082     | 7 647   | 10 246    | 15 270  |
| Riesling                   | 2 276     | 1 878   | 1 891     | 2 583   |
| Sauvignon blanc            | 6 966     | 7 187   | 7 844     | 15 613  |
| Semillon                   | 11 780    | 11 677  | 12 448    | 15 667  |
| Traminer                   | 311       | 313     | 313       | 345     |
| Verdelho                   | 1 028     | 875     | 875       | 1 183   |
| Total                      | 183 940   | 160 459 | 165 299   | 230 277 |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 1 158     | 1 160   | 1 160     | 1 403   |
| Mataro (Mourvedre)         | 150       | 206     | 206       | 242     |
| Total                      | 1 308     | 1 367   | 1 367     | 1 645   |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 1 939     | 1 579   | 1 579     | 2 175   |
| Doradillo                  | 1         | 8       | 8         | 8       |
| Palomino                   | 3         | 2       | 2         | 3       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 1 944     | 1 590   | 1 590     | 2 187   |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 40 337    | 34 357  | 34 893    | 52 482  |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 5 524     | 5 825   | 6 620     | 9 476   |
| <b>White</b>               |           |         |           |         |
| Total                      | 3 717     | 4 717   | 5 561     | 7 988   |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 134 168   | 137 488 | 138 513   | 171 532 |
| <b>White</b>               |           |         |           |         |
| Total                      | 229 940   | 201 125 | 207 344   | 292 937 |
| Total                      | 364 108   | 338 613 | 345 857   | 464 469 |

## Wine grape production - Big Rivers (excl. Murray Darling zone)

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 163       | 181     | 202       | 205     |
| Cabernet sau vignon        | 16 432    | 19 447  | 21 717    | 22 056  |
| Malbec                     | 33        | 36      | 41        | 41      |
| Merlot                     | 12 281    | 13 045  | 17 425    | 18 860  |
| Petit verdot               | 1 840     | 2 282   | 2 553     | 2 704   |
| Pinot noir                 | 2 122     | 2 358   | 2 724     | 3 076   |
| Ruby cabernet              | 8 044     | 8 533   | 9 142     | 9 142   |
| Shiraz                     | 44 511    | 56 942  | 65 002    | 69 710  |
| Total                      | 85 429    | 102 826 | 118 810   | 125 797 |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 63 498    | 71 511  | 78 621    | 85 830  |
| Chenin blanc               | 860       | 951     | 1 043     | 1 072   |
| Colombard                  | 10 064    | 11 503  | 12 183    | 13 933  |
| Muscadelle (Tokay)         | 14        | 16      | 17        | 18      |
| Pinot gris                 | 5 056     | 6 704   | 8 802     | 10 303  |
| Riesling                   | 3 897     | 3 962   | 4 111     | 4 111   |
| Sauvignon blanc            | 3 511     | 3 922   | 4 564     | 5 390   |
| Semillon                   | 31 652    | 36 403  | 40 642    | 42 819  |
| Traminer                   | 4 188     | 4 862   | 5 071     | 5 168   |
| Verdelho                   | 4 553     | 4 963   | 5 282     | 5 287   |
| Total                      | 127 298   | 144 801 | 160 341   | 173 935 |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 355       | 518     | 560       | 575     |
| Mataro (Mourvedre)         | 879       | 998     | 1 116     | 1 134   |
| Total                      | 1 235     | 1 516   | 1 677     | 1 710   |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 8         | 45      | 48        | 49      |
| Palomino                   | 21        | 24      | 25        | 26      |
| Trebbiano                  | 2 395     | 2 680   | 2 835     | 2 915   |
| Total                      | 2 425     | 2 750   | 2 909     | 2 991   |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 4 027     | 4 356   | 4 800     | 5 874   |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 6 089     | 6 890   | 7 719     | 8 073   |
| <b>White</b>               |           |         |           |         |
| Total                      | 4 247     | 4 966   | 6 086     | 6 668   |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 92 754    | 111 233 | 128 207   | 135 581 |
| <b>White</b>               |           |         |           |         |
| Total                      | 137 998   | 156 874 | 174 137   | 189 468 |
| Total                      | 230 752   | 268 108 | 302 344   | 325 050 |

## Wine grape production - Western Plains zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 0         | 0       | 0         | 0       |
| Cabernet sauvignon         | 178       | 121     | 266       | 242     |
| Malbec                     | 0         | 0       | 0         | 0       |
| Merlot                     | 69        | 58      | 128       | 116     |
| Petit verdot               | 3         | 4       | 8         | 8       |
| Pinot noir                 | 0         | 0       | 0         | 0       |
| Ruby cabernet              | 49        | 49      | 49        | 49      |
| Shiraz                     | 750       | 381     | 839       | 763     |
| Total                      | 1 050     | 614     | 1 293     | 1 180   |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 516       | 252     | 554       | 504     |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 0         | 0       | 0         | 0       |
| Riesling                   | 3         | 3       | 3         | 8       |
| Sauvignon blanc            | 0         | 0       | 0         | 0       |
| Semillon                   | 46        | 25      | 55        | 50      |
| Traminer                   | 0         | 0       | 0         | 0       |
| Verdelho                   | 149       | 66      | 146       | 133     |
| Total                      | 715       | 347     | 760       | 697     |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 36        | 31      | 68        | 62      |
| Mataro (Mourvedre)         | 0         | 0       | 0         | 0       |
| Total                      | 36        | 31      | 68        | 62      |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 4         | 42      | 88        | 80      |
| <b>White</b>               |           |         |           |         |
| Total                      | 2         | 2       | 2         | 4       |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 1 091     | 688     | 1 450     | 1 323   |
| <b>White</b>               |           |         |           |         |
| Total                      | 717       | 349     | 763       | 701     |
| Total                      | 1 808     | 1 038   | 2 213     | 2 025   |

## Wine grape production - Central Ranges zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 418       | 466     | 524       | 538     |
| Cabernet sauvignon         | 7 846     | 12 990  | 11 101    | 11 159  |
| Malbec                     | 134       | 141     | 158       | 163     |
| Merlot                     | 4 584     | 6 683   | 5 657     | 6 013   |
| Petit verdot               | 175       | 192     | 175       | 181     |
| Pinot noir                 | 581       | 1 088   | 943       | 974     |
| Ruby cabernet              | 413       | 409     | 422       | 433     |
| Shiraz                     | 10 637    | 21 365  | 18 539    | 19 140  |
| Total                      | 24 791    | 43 336  | 37 522    | 38 604  |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 11 329    | 17 102  | 18 299    | 18 310  |
| Chenin blanc               | 0         | 2       | 2         | 2       |
| Colombard                  | 1         | 6       | 7         | 7       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 221       | 258     | 273       | 284     |
| Riesling                   | 487       | 793     | 735       | 742     |
| Sauvignon blanc            | 1 245     | 1 513   | 1 541     | 1 552   |
| Semillon                   | 2 391     | 3 467   | 3 260     | 3 260   |
| Traminer                   | 390       | 625     | 606       | 607     |
| Verdelho                   | 943       | 977     | 959       | 1 036   |
| Total                      | 17 011    | 24 747  | 25 686    | 25 803  |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 32        | 44      | 44        | 44      |
| Mataro (Mourvedre)         | 25        | 38      | 40        | 41      |
| Total                      | 57        | 83      | 84        | 86      |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 9       | 9         | 9       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 9       | 9         | 9       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 376       | 642     | 594       | 605     |
| <b>White</b>               |           |         |           |         |
| Total                      | 329       | 424     | 436       | 437     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 25 225    | 44 062  | 38 201    | 39 296  |
| <b>White</b>               |           |         |           |         |
| Total                      | 17 340    | 25 181  | 26 131    | 26 250  |
| Total                      | 42 566    | 69 244  | 64 333    | 65 546  |

Wine grape production - Southern New South Wales zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 3         | 7       | 6         | 6       |
| Cabernet sauvignon         | 1 934     | 2 786   | 2 811     | 2 811   |
| Malbec                     | 0         | 1       | 1         | 1       |
| Merlot                     | 600       | 1 488   | 1 483     | 1 487   |
| Petit verdot               | 44        | 53      | 53        | 53      |
| Pinot noir                 | 528       | 751     | 740       | 740     |
| Ruby cabernet              | 191       | 276     | 276       | 276     |
| Shiraz                     | 2 882     | 5 272   | 5 427     | 5 503   |
| Total                      | 6 185     | 10 638  | 10 800    | 10 881  |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 1 567     | 2 934   | 2 983     | 2 983   |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 25        | 51      | 147       | 164     |
| Riesling                   | 184       | 602     | 468       | 468     |
| Sauvignon blanc            | 155       | 282     | 315       | 315     |
| Semillon                   | 112       | 232     | 223       | 224     |
| Traminer                   | 1         | 3       | 3         | 3       |
| Verdelho                   | 118       | 91      | 89        | 89      |
| Total                      | 2 166     | 4 197   | 4 231     | 4 249   |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 5         | 8       | 8         | 8       |
| Mataro (Mourvedre)         | 4         | 7       | 7         | 7       |
| Total                      | 10        | 16      | 15        | 15      |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 34        | 34      | 34        | 34      |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 163       | 300     | 327       | 330     |
| <b>White</b>               |           |         |           |         |
| Total                      | 106       | 256     | 256       | 258     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 6 359     | 10 954  | 11 144    | 11 226  |
| <b>White</b>               |           |         |           |         |
| Total                      | 2 306     | 4 489   | 4 523     | 4 542   |
| Total                      | 8 666     | 15 443  | 15 667    | 15 769  |

## Wine grape production - South Coast zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 0         | 4       | 4         | 4       |
| Cabernet sauvignon         | 44        | 73      | 73        | 73      |
| Malbec                     | 25        | 9       | 9         | 9       |
| Merlot                     | 16        | 21      | 21        | 21      |
| Petit verdot               | 4         | 3       | 3         | 3       |
| Pinot noir                 | 51        | 43      | 50        | 55      |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 14        | 13      | 17        | 17      |
| Total                      | 157       | 169     | 180       | 185     |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 85        | 259     | 259       | 259     |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 17        | 19      | 32        | 32      |
| Riesling                   | 5         | 22      | 29        | 29      |
| Sauvignon blanc            | 46        | 73      | 73        | 83      |
| Semillon                   | 23        | 18      | 18        | 18      |
| Traminer                   | 5         | 7       | 7         | 7       |
| Verdelho                   | 30        | 24      | 24        | 24      |
| Total                      | 214       | 426     | 446       | 455     |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 1         | 1       | 1         | 1       |
| Mataro (Mourvedre)         | 0         | 0       | 0         | 0       |
| Total                      | 1         | 1       | 1         | 1       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 7         | 7       | 7         | 7       |
| Total                      | 7         | 7       | 7         | 7       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 72        | 74      | 77        | 77      |
| <b>White</b>               |           |         |           |         |
| Total                      | 6         | 18      | 18        | 26      |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 230       | 245     | 258       | 264     |
| <b>White</b>               |           |         |           |         |
| Total                      | 228       | 452     | 471       | 489     |
| Total                      | 458       | 697     | 730       | 753     |

## Wine grape production - Northern Slopes zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 0         | 0       | 0         | 0       |
| Cabernet sauvignon         | 12        | 22      | 22        | 22      |
| Malbec                     | 0         | 2       | 2         | 2       |
| Merlot                     | 44        | 53      | 53        | 53      |
| Petit verdot               | 1         | 1       | 1         | 1       |
| Pinot noir                 | 3         | 10      | 10        | 10      |
| Ruby cabernet              | 49        | 65      | 65        | 65      |
| Shiraz                     | 131       | 200     | 200       | 200     |
| Total                      | 242       | 357     | 357       | 357     |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 72        | 73      | 84        | 100     |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 4         | 2       | 2         | 2       |
| Riesling                   | 12        | 10      | 10        | 10      |
| Sauvignon blanc            | 3         | 2       | 2         | 2       |
| Semillon                   | 2         | 4       | 4         | 4       |
| Traminer                   | 14        | 11      | 11        | 11      |
| Verdelho                   | 9         | 8       | 8         | 8       |
| Total                      | 118       | 114     | 124       | 140     |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 0         | 4       | 4         | 4       |
| Mataro (Mourvedre)         | 2         | 1       | 1         | 1       |
| Total                      | 2         | 6       | 6         | 6       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 19        | 110     | 110       | 110     |
| <b>White</b>               |           |         |           |         |
| Total                      | 1         | 1       | 1         | 1       |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 263       | 473     | 473       | 473     |
| <b>White</b>               |           |         |           |         |
| Total                      | 120       | 115     | 126       | 142     |
| Total                      | 384       | 589     | 600       | 616     |

## Wine grape production - Northern Rivers zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 8         | 4       | 4         | 4       |
| Cabernet sauvignon         | 8         | 10      | 12        | 12      |
| Malbec                     | 0         | 0       | 0         | 0       |
| Merlot                     | 5         | 4       | 4         | 4       |
| Petit verdot               | 4         | 2       | 2         | 2       |
| Pinot noir                 | 4         | 12      | 12        | 12      |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 10        | 13      | 15        | 15      |
| Total                      | 41        | 47      | 52        | 52      |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 28        | 19      | 19        | 21      |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 0         | 0       | 0         | 0       |
| Riesling                   | 1         | 1       | 1         | 1       |
| Sauvignon blanc            | 0         | 0       | 0         | 0       |
| Semillon                   | 43        | 29      | 29        | 29      |
| Traminer                   | 3         | 3       | 3         | 3       |
| Verdelho                   | 33        | 27      | 27        | 27      |
| Total                      | 109       | 80      | 80        | 82      |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 0         | 0       | 0         | 0       |
| Mataro (Mourvedre)         | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 54        | 51      | 51        | 52      |
| <b>White</b>               |           |         |           |         |
| Total                      | 12        | 11      | 11        | 12      |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 95        | 99      | 103       | 104     |
| <b>White</b>               |           |         |           |         |
| Total                      | 122       | 92      | 92        | 95      |
| Total                      | 218       | 192     | 196       | 200     |

## Wine grape production - Hunter Valley zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 13        | 20      | 23        | 23      |
| Cabernet sauvignon         | 373       | 567     | 567       | 577     |
| Malbec                     | 13        | 19      | 19        | 19      |
| Merlot                     | 556       | 798     | 814       | 826     |
| Petit verdot               | 12        | 18      | 18        | 18      |
| Pinot noir                 | 189       | 319     | 319       | 323     |
| Ruby cabernet              | 2         | 41      | 41        | 41      |
| Shiraz                     | 2 781     | 4 294   | 4 299     | 4 326   |
| Total                      | 3 941     | 6 079   | 6 104     | 6 157   |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 6 490     | 9 158   | 9 234     | 9 242   |
| Chenin blanc               | 3         | 3       | 3         | 3       |
| Colombard                  | 72        | 84      | 84        | 84      |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 21        | 24      | 26        | 26      |
| Riesling                   | 33        | 37      | 37        | 37      |
| Sauvignon blanc            | 288       | 348     | 348       | 353     |
| Semillon                   | 4 693     | 5 225   | 5 279     | 5 279   |
| Traminer                   | 274       | 317     | 324       | 324     |
| Verdelho                   | 2 073     | 2 980   | 3 005     | 3 005   |
| Total                      | 13 952    | 18 181  | 18 346    | 18 358  |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 20        | 31      | 31        | 31      |
| Mataro (Mourvedre)         | 3         | 3       | 4         | 4       |
| Total                      | 24        | 34      | 35        | 35      |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 5         | 5       | 5         | 5       |
| Total                      | 5         | 5       | 5         | 5       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 21        | 25      | 25        | 25      |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 234       | 321     | 332       | 332     |
| <b>White</b>               |           |         |           |         |
| Total                      | 90        | 103     | 113       | 119     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 4 200     | 6 435   | 6 471     | 6 525   |
| <b>White</b>               |           |         |           |         |
| Total                      | 14 069    | 18 315  | 18 490    | 18 509  |
| Total                      | 18 269    | 24 751  | 24 961    | 25 034  |

## Wine grape production - Queensland zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 8         | 15      | 17        | 17      |
| Cabernet sauvignon         | 319       | 1 031   | 1 719     | 1 721   |
| Malbec                     | 6         | 13      | 13        | 13      |
| Merlot                     | 236       | 381     | 506       | 506     |
| Petit verdot               | 46        | 83      | 100       | 100     |
| Pinot noir                 | 32        | 20      | 25        | 30      |
| Ruby cabernet              | 3         | 13      | 16        | 16      |
| Shiraz                     | 519       | 1 701   | 2 270     | 2 270   |
| Total                      | 1 172     | 3 261   | 4 669     | 4 675   |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 402       | 910     | 1 294     | 1 302   |
| Chenin blanc               | 9         | 9       | 10        | 10      |
| Colombard                  | 17        | 17      | 17        | 17      |
| Muscadelle (Tokay)         | 8         | 8       | 8         | 8       |
| Pinot gris                 | 37        | 43      | 55        | 55      |
| Riesling                   | 12        | 15      | 15        | 15      |
| Sauvignon blanc            | 31        | 38      | 46        | 46      |
| Semillon                   | 148       | 479     | 604       | 604     |
| Traminer                   | 2         | 4       | 6         | 6       |
| Verdelho                   | 234       | 308     | 446       | 447     |
| Total                      | 905       | 1 836   | 2 505     | 2 514   |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 21        | 20      | 22        | 22      |
| Mataro (Mourvedre)         | 4         | 17      | 23        | 23      |
| Total                      | 26        | 37      | 45        | 45      |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 2       | 2         | 2       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 2       | 2         | 2       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 9         | 10      | 12        | 12      |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 164       | 317     | 432       | 437     |
| <b>White</b>               |           |         |           |         |
| Total                      | 489       | 499     | 671       | 678     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 1 363     | 3 616   | 5 148     | 5 159   |
| <b>White</b>               |           |         |           |         |
| Total                      | 1 403     | 2 349   | 3 192     | 3 208   |
| Total                      | 2 767     | 5 966   | 8 341     | 8 367   |

## Wine grape production - North East Victoria zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 11        | 37      | 40        | 41      |
| Cabernet sauvignon         | 1809      | 3340    | 3714      | 3883    |
| Malbec                     | 9         | 65      | 66        | 67      |
| Merlot                     | 1907      | 2976    | 3254      | 3526    |
| Petit verdot               | 44        | 562     | 617       | 647     |
| Pinot noir                 | 685       | 1056    | 1113      | 1163    |
| Ruby cabernet              | 6         | 14      | 15        | 15      |
| Shiraz                     | 2449      | 4243    | 4651      | 4779    |
| Total                      | 6922      | 12296   | 13474     | 14124   |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 1076      | 1592    | 2176      | 2454    |
| Chenin blanc               | 36        | 94      | 114       | 125     |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 201       | 411     | 437       | 467     |
| Pinot gris                 | 887       | 900     | 1147      | 1285    |
| Riesling                   | 449       | 617     | 766       | 868     |
| Sauvignon blanc            | 919       | 1276    | 1565      | 1703    |
| Semillon                   | 80        | 83      | 100       | 109     |
| Traminer                   | 22        | 55      | 66        | 70      |
| Verdelho                   | 10        | 253     | 253       | 253     |
| Total                      | 3683      | 5285    | 6627      | 7338    |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 23        | 29      | 31        | 33      |
| Mataro (Mourvedre)         | 31        | 39      | 42        | 45      |
| Total                      | 55        | 69      | 74        | 79      |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 4         | 3       | 3         | 4       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 9         | 12      | 15        | 21      |
| Trebbiano                  | 34        | 45      | 55        | 64      |
| Total                      | 48        | 61      | 74        | 89      |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 1         | 1       | 19        | 19      |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 1551      | 2299    | 2526      | 2685    |
| <b>White</b>               |           |         |           |         |
| Total                      | 381       | 587     | 721       | 816     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 8528      | 14665   | 16075     | 16889   |
| <b>White</b>               |           |         |           |         |
| Total                      | 4115      | 5934    | 7443      | 8263    |
| Total                      | 12643     | 20600   | 23518     | 25153   |

## Wine grape production - Central Victoria zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 27        | 67      | 93        | 93      |
| Cabernet sauvignon         | 2 584     | 4 537   | 4 510     | 4 640   |
| Malbec                     | 107       | 122     | 144       | 145     |
| Merlot                     | 1 285     | 2 005   | 2 011     | 1 989   |
| Petit verdot               | 157       | 103     | 112       | 112     |
| Pinot noir                 | 802       | 3 325   | 3 019     | 3 024   |
| Ruby cabernet              | 46        | 57      | 67        | 67      |
| Shiraz                     | 6 478     | 11 116  | 11 919    | 11 950  |
| Total                      | 11 489    | 21 336  | 21 878    | 22 024  |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 2 503     | 3 855   | 3 648     | 3 654   |
| Chenin blanc               | 5         | 8       | 9         | 9       |
| Colombard                  | 47        | 67      | 76        | 76      |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 366       | 346     | 491       | 511     |
| Riesling                   | 651       | 798     | 923       | 924     |
| Sauvignon blanc            | 1 114     | 1 607   | 1 659     | 1 661   |
| Semillon                   | 283       | 350     | 356       | 356     |
| Traminer                   | 122       | 123     | 136       | 136     |
| Verdelho                   | 91        | 172     | 185       | 185     |
| Total                      | 5 187     | 7 329   | 7 486     | 7 515   |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 138       | 85      | 139       | 139     |
| Mataro (Mourvedre)         | 134       | 152     | 184       | 185     |
| Total                      | 272       | 237     | 323       | 325     |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 22        | 22      | 24        | 24      |
| Total                      | 22        | 22      | 24        | 24      |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 3         | 4       | 5         | 5       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 946       | 1 075   | 1 125     | 1 130   |
| <b>White</b>               |           |         |           |         |
| Total                      | 528       | 769     | 904       | 919     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 12 708    | 22 649  | 23 327    | 23 479  |
| <b>White</b>               |           |         |           |         |
| Total                      | 5 741     | 8 126   | 8 421     | 8 465   |
| Total                      | 18 450    | 30 775  | 31 748    | 31 945  |

## Wine grape production - Western Victoria zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 3         | 9       | 10        | 10      |
| Cabernet sauvignon         | 155       | 569     | 625       | 625     |
| Malbec                     | 0         | 2       | 2         | 2       |
| Merlot                     | 124       | 284     | 312       | 365     |
| Petit verdot               | 35        | 86      | 86        | 86      |
| Pinot noir                 | 263       | 718     | 801       | 834     |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 1220      | 2625    | 2910      | 3163    |
| Total                      | 1803      | 4299    | 4749      | 5088    |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 486       | 642     | 660       | 678     |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 63        | 121     | 132       | 134     |
| Riesling                   | 83        | 110     | 122       | 153     |
| Sauvignon blanc            | 57        | 97      | 97        | 97      |
| Semillon                   | 52        | 395     | 404       | 406     |
| Traminer                   | 5         | 8       | 8         | 8       |
| Verdelho                   | 0         | 6       | 6         | 6       |
| Total                      | 748       | 1381    | 1432      | 1485    |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 0         | 0       | 0         | 0       |
| Mataro (Mourvedre)         | 4         | 4       | 4         | 4       |
| Total                      | 4         | 4       | 4         | 4       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 1         | 1       | 1         | 1       |
| Total                      | 1         | 1       | 1         | 1       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 182       | 182     | 182       | 182     |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 145       | 243     | 281       | 283     |
| <b>White</b>               |           |         |           |         |
| Total                      | 29        | 30      | 77        | 81      |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 1952      | 4547    | 5035      | 5376    |
| <b>White</b>               |           |         |           |         |
| Total                      | 963       | 1596    | 1694      | 1751    |
| Total                      | 2915      | 6143    | 6730      | 7127    |

## Wine grape production - Port Phillip zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 45        | 54      | 60        | 60      |
| Cabernet sauvignon         | 1 408     | 1 731   | 1 896     | 1 923   |
| Malbec                     | 21        | 29      | 32        | 32      |
| Merlot                     | 835       | 1 440   | 1 568     | 1 589   |
| Petit verdot               | 28        | 29      | 36        | 42      |
| Pinot noir                 | 4 086     | 5 015   | 5 567     | 5 607   |
| Ruby cabernet              | 54        | 62      | 67        | 67      |
| Shiraz                     | 1 945     | 1 849   | 2 175     | 2 205   |
| Total                      | 8 426     | 10 212  | 11 404    | 11 529  |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 3 540     | 5 294   | 5 948     | 6 058   |
| Chenin blanc               | 1         | 2       | 2         | 2       |
| Colombard                  | 4         | 4       | 5         | 5       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 515       | 928     | 1 003     | 1 023   |
| Riesling                   | 109       | 128     | 145       | 154     |
| Sauvignon blanc            | 1 029     | 1 257   | 1 416     | 1 442   |
| Semillon                   | 164       | 192     | 216       | 221     |
| Traminer                   | 10        | 10      | 11        | 11      |
| Verdelho                   | 13        | 15      | 16        | 16      |
| Total                      | 5 388     | 7 835   | 8 766     | 8 937   |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 1         | 1       | 1         | 1       |
| Mataro (Mourvedre)         | 11        | 12      | 14        | 14      |
| Total                      | 12        | 13      | 16        | 16      |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 42        | 42      | 42        | 42      |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 221       | 258     | 292       | 294     |
| <b>White</b>               |           |         |           |         |
| Total                      | 244       | 303     | 353       | 373     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 8 660     | 10 484  | 11 712    | 11 840  |
| <b>White</b>               |           |         |           |         |
| Total                      | 5 676     | 8 182   | 9 164     | 9 354   |
| Total                      | 14 337    | 18 667  | 20 877    | 21 194  |

## Wine grape production - Gippsland zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 6         | 10      | 10        | 10      |
| Cabernet sauvignon         | 10        | 43      | 43        | 44      |
| Malbec                     | 1         | 3       | 3         | 3       |
| Merlot                     | 6         | 17      | 17        | 17      |
| Petit verdot               | 0         | 0       | 0         | 0       |
| Pinot noir                 | 76        | 144     | 145       | 145     |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 5         | 14      | 18        | 23      |
| Total                      | 107       | 234     | 240       | 246     |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 42        | 132     | 140       | 141     |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 1       | 1         | 1       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 5         | 11      | 11        | 12      |
| Riesling                   | 3         | 11      | 16        | 16      |
| Sauvignon blanc            | 5         | 24      | 24        | 25      |
| Semillon                   | 14        | 18      | 19        | 19      |
| Traminer                   | 0         | 13      | 13        | 13      |
| Verdelho                   | 1         | 2       | 2         | 2       |
| Total                      | 75        | 214     | 230       | 231     |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 0         | 0       | 0         | 0       |
| Mataro (Mourvedre)         | 1         | 1       | 1         | 1       |
| Total                      | 1         | 1       | 1         | 1       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 1       | 1         | 1       |
| Total                      | 0         | 1       | 1         | 1       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 14        | 23      | 23        | 23      |
| <b>White</b>               |           |         |           |         |
| Total                      | 3         | 4       | 4         | 6       |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 122       | 259     | 265       | 270     |
| <b>White</b>               |           |         |           |         |
| Total                      | 79        | 220     | 236       | 240     |
| Total                      | 202       | 480     | 502       | 511     |

## Wine grape production - Mount Lofty Ranges zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 60        | 189     | 196       | 196     |
| Cabernet sauvignon         | 4 258     | 6 068   | 6 711     | 6 755   |
| Malbec                     | 132       | 278     | 319       | 319     |
| Merlot                     | 4 139     | 4 562   | 4 688     | 4 753   |
| Petit verdot               | 148       | 158     | 170       | 170     |
| Pinot noir                 | 4 887     | 5 152   | 5 205     | 5 234   |
| Ruby cabernet              | 11        | 14      | 16        | 16      |
| Shiraz                     | 7 719     | 11 296  | 13 255    | 13 294  |
| Total                      | 21 359    | 27 720  | 30 564    | 30 740  |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 8 945     | 12 038  | 12 197    | 12 270  |
| Chenin blanc               | 74        | 100     | 101       | 101     |
| Colombard                  | 239       | 226     | 226       | 226     |
| Muscadelle (Tokay)         | 6         | 7       | 8         | 8       |
| Pinot gris                 | 1 061     | 1 342   | 1 425     | 1 519   |
| Riesling                   | 6 671     | 7 755   | 8 136     | 8 150   |
| Sauvignon blanc            | 5 975     | 6 728   | 6 988     | 7 050   |
| Semillon                   | 1 974     | 2 190   | 2 368     | 2 415   |
| Traminer                   | 270       | 306     | 315       | 315     |
| Verdelho                   | 166       | 177     | 178       | 178     |
| Total                      | 25 385    | 30 874  | 31 947    | 32 236  |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 499       | 555     | 582       | 582     |
| Mataro (Mourvedre)         | 94        | 111     | 117       | 117     |
| Total                      | 594       | 667     | 699       | 699     |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 18        | 24      | 26        | 26      |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 18        | 24      | 26        | 26      |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 25        | 29      | 29        | 29      |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 1 017     | 1 282   | 1 344     | 1 350   |
| <b>White</b>               |           |         |           |         |
| Total                      | 714       | 714     | 758       | 760     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 22 971    | 29 670  | 32 608    | 32 790  |
| <b>White</b>               |           |         |           |         |
| Total                      | 26 144    | 31 643  | 32 762    | 33 053  |
| Total                      | 49 115    | 61 314  | 65 371    | 65 844  |

## Wine grape production - Barossa Valley zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 141       | 374     | 374       | 374     |
| Cabernet sauvignon         | 6 063     | 11 608  | 11 814    | 11 814  |
| Malbec                     | 74        | 110     | 110       | 110     |
| Merlot                     | 2 701     | 4 432   | 4 439     | 4 440   |
| Petit verdot               | 147       | 196     | 205       | 205     |
| Pinot noir                 | 822       | 1 054   | 1 064     | 1 096   |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 19 238    | 42 604  | 43 224    | 43 713  |
| Total                      | 29 189    | 60 381  | 61 233    | 61 755  |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 5 776     | 10 187  | 10 254    | 10 278  |
| Chenin blanc               | 188       | 280     | 283       | 283     |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 94        | 140     | 140       | 140     |
| Pinot gris                 | 135       | 191     | 202       | 209     |
| Riesling                   | 6 869     | 8 706   | 8 868     | 9 102   |
| Sauvignon blanc            | 1 276     | 1 883   | 1 933     | 1 944   |
| Semillon                   | 5 768     | 8 476   | 8 486     | 8 489   |
| Traminer                   | 220       | 314     | 314       | 314     |
| Verdelho                   | 36        | 53      | 53        | 53      |
| Total                      | 20 366    | 30 235  | 30 536    | 30 815  |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 3 068     | 5 014   | 5 016     | 5 016   |
| Mataro (Mourvedre)         | 803       | 1 034   | 1 052     | 1 056   |
| Total                      | 3 871     | 6 049   | 6 069     | 6 072   |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 2         | 3       | 3         | 3       |
| Palomino                   | 84        | 125     | 125       | 125     |
| Trebbiano                  | 6         | 10      | 10        | 10      |
| Total                      | 93        | 139     | 139       | 139     |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 5         | 6       | 8         | 8       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 812       | 1 101   | 1 115     | 1 225   |
| <b>White</b>               |           |         |           |         |
| Total                      | 1 184     | 1 702   | 1 728     | 1 777   |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 33 873    | 67 531  | 68 419    | 69 053  |
| <b>White</b>               |           |         |           |         |
| Total                      | 21 649    | 32 083  | 32 412    | 32 740  |
| Total                      | 55 523    | 99 614  | 100 831   | 101 793 |

## Wine grape production - Fleurieu Peninsula zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 198       | 307     | 472       | 428     |
| Cabernet sauvignon         | 20 058    | 27 353  | 33 613    | 31 839  |
| Malbec                     | 229       | 277     | 342       | 432     |
| Merlot                     | 6 039     | 8 455   | 8 759     | 8 654   |
| Petit verdot               | 956       | 1 356   | 1 118     | 1 256   |
| Pinot noir                 | 1 278     | 1 767   | 1 686     | 1 978   |
| Ruby cabernet              | 103       | 133     | 159       | 136     |
| Shiraz                     | 30 984    | 43 818  | 54 201    | 51 702  |
| Total                      | 59 849    | 83 470  | 100 355   | 96 428  |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 13 618    | 18 993  | 18 156    | 18 618  |
| Chenin blanc               | 56        | 81      | 81        | 83      |
| Colombard                  | 148       | 174     | 169       | 182     |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 430       | 563     | 405       | 574     |
| Riesling                   | 2 284     | 3 072   | 2 811     | 3 040   |
| Sauvignon blanc            | 1 409     | 1 992   | 2 577     | 2 479   |
| Semillon                   | 1 395     | 1 957   | 2 085     | 2 182   |
| Traminer                   | 230       | 235     | 228       | 228     |
| Verdelho                   | 554       | 746     | 925       | 908     |
| Total                      | 20 128    | 27 817  | 27 442    | 28 297  |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 3 502     | 4 977   | 5 394     | 5 774   |
| Mataro (Mourvedre)         | 273       | 397     | 298       | 346     |
| Total                      | 3 776     | 5 374   | 5 693     | 6 121   |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 21        | 21      | 17        | 15      |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 7         | 10      | 10        | 10      |
| Total                      | 29        | 33      | 28        | 27      |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 33        | 38      | 29        | 33      |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 1 275     | 1 782   | 1 743     | 1 763   |
| <b>White</b>               |           |         |           |         |
| Total                      | 655       | 935     | 1 134     | 1 030   |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 64 901    | 90 627  | 107 791   | 104 312 |
| <b>White</b>               |           |         |           |         |
| Total                      | 20 846    | 28 824  | 28 634    | 29 387  |
| Total                      | 85 747    | 119 451 | 136 426   | 133 700 |

## Wine grape production - Limestone Coast zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 904       | 1 105   | 1 085     | 1 094   |
| Cabernet sauvignon         | 28 995    | 58 926  | 62 643    | 63 657  |
| Malbec                     | 623       | 761     | 716       | 733     |
| Merlot                     | 8 976     | 14 059  | 20 302    | 20 862  |
| Petit verdot               | 1 584     | 2 146   | 2 284     | 2 317   |
| Pinot noir                 | 1 356     | 1 745   | 1 755     | 1 780   |
| Ruby cabernet              | 303       | 405     | 353       | 334     |
| Shiraz                     | 19 281    | 36 474  | 48 134    | 45 182  |
| Total                      | 62 025    | 115 625 | 137 275   | 135 964 |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 15 848    | 27 522  | 25 138    | 29 742  |
| Chenin blanc               | 58        | 85      | 85        | 83      |
| Colombard                  | 90        | 112     | 140       | 137     |
| Muscadelle (Tokay)         | 71        | 103     | 103       | 100     |
| Pinot gris                 | 691       | 1 127   | 1 543     | 1 828   |
| Riesling                   | 2 170     | 3 792   | 3 623     | 4 364   |
| Sauvignon blanc            | 1 709     | 3 193   | 3 214     | 3 945   |
| Semillon                   | 809       | 1 145   | 1 130     | 1 250   |
| Traminer                   | 264       | 329     | 408       | 500     |
| Verdelho                   | 643       | 701     | 609       | 701     |
| Total                      | 22 358    | 38 113  | 35 997    | 42 656  |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 28        | 34      | 31        | 30      |
| Mataro (Mourvedre)         | 1 572     | 1 530   | 1 482     | 1 528   |
| Total                      | 1 600     | 1 565   | 1 514     | 1 558   |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 54        | 68      | 68        | 66      |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 239       | 361     | 345       | 360     |
| <b>White</b>               |           |         |           |         |
| Total                      | 485       | 723     | 678       | 760     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 63 865    | 117 552 | 139 135   | 137 883 |
| <b>White</b>               |           |         |           |         |
| Total                      | 22 899    | 38 904  | 36 743    | 43 483  |
| Total                      | 86 764    | 156 457 | 175 879   | 181 367 |

## Wine grape production - Lower Murray zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 73        | 84      | 94        | 109     |
| Cabernet sauvignon         | 43 829    | 48 171  | 55 057    | 62 290  |
| Malbec                     | 307       | 352     | 391       | 452     |
| Merlot                     | 16 155    | 17 706  | 20 172    | 23 000  |
| Petit verdot               | 7 285     | 7 308   | 7 851     | 9 399   |
| Pinot noir                 | 5 182     | 5 180   | 5 180     | 5 765   |
| Ruby cabernet              | 3 437     | 3 543   | 3 763     | 4 358   |
| Shiraz                     | 68 720    | 72 934  | 88 043    | 103 900 |
| Total                      | 144 992   | 155 281 | 180 554   | 209 277 |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 97 190    | 98 695  | 98 503    | 108 719 |
| Chenin blanc               | 2 882     | 2 879   | 3 049     | 3 876   |
| Colombard                  | 23 630    | 21 524  | 21 775    | 27 859  |
| Muscadelle (Tokay)         | 216       | 199     | 198       | 246     |
| Pinot gris                 | 90        | 82      | 97        | 232     |
| Riesling                   | 4 147     | 3 829   | 3 830     | 4 889   |
| Sauvignon blanc            | 4 862     | 4 718   | 4 880     | 6 894   |
| Semillon                   | 7 880     | 7 213   | 7 386     | 9 944   |
| Traminer                   | 2 136     | 2 137   | 2 133     | 2 643   |
| Verdelho                   | 1 962     | 1 804   | 1 800     | 2 231   |
| Total                      | 145 000   | 143 085 | 143 655   | 167 537 |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 6 419     | 6 450   | 6 466     | 7 665   |
| Mataro (Mourvedre)         | 2 678     | 2 929   | 3 055     | 3 565   |
| Total                      | 9 097     | 9 379   | 9 521     | 11 231  |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 118       | 107     | 107       | 133     |
| Doradillo                  | 1 957     | 1 798   | 1 795     | 2 224   |
| Palomino                   | 364       | 344     | 343       | 395     |
| Trebbiano                  | 88        | 80      | 80        | 99      |
| Total                      | 2 527     | 2 331   | 2 327     | 2 853   |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 20 275    | 18 721  | 19 675    | 28 278  |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 1 537     | 1 601   | 1 799     | 4 137   |
| <b>White</b>               |           |         |           |         |
| Total                      | 3 537     | 3 829   | 4 397     | 5 702   |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 155 627   | 166 261 | 191 876   | 224 646 |
| <b>White</b>               |           |         |           |         |
| Total                      | 171 340   | 167 967 | 170 055   | 204 372 |
| Total                      | 326 968   | 334 229 | 361 931   | 429 018 |

## Wine grape production - The Peninsulas zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 0         | 0       | 0         | 0       |
| Cabernet sauvignon         | 32        | 117     | 117       | 117     |
| Malbec                     | 0         | 0       | 0         | 0       |
| Merlot                     | 38        | 140     | 140       | 140     |
| Petit verdot               | 0         | 0       | 0         | 0       |
| Pinot noir                 | 0         | 0       | 0         | 0       |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 76        | 308     | 308       | 308     |
| Total                      | 148       | 567     | 567       | 567     |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 5         | 2       | 2         | 2       |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 0         | 0       | 0         | 0       |
| Riesling                   | 5         | 5       | 5         | 5       |
| Sauvignon blanc            | 8         | 12      | 12        | 12      |
| Semillon                   | 0         | 8       | 8         | 8       |
| Traminer                   | 0         | 0       | 0         | 0       |
| Verdelho                   | 0         | 0       | 0         | 0       |
| Total                      | 19        | 29      | 29        | 29      |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 7         | 2       | 2         | 2       |
| Mataro (Mourvedre)         | 0         | 0       | 0         | 0       |
| Total                      | 7         | 2       | 2         | 2       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>White</b>               |           |         |           |         |
| Total                      | 6         | 6       | 6         | 6       |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 156       | 569     | 569       | 569     |
| <b>White</b>               |           |         |           |         |
| Total                      | 25        | 36      | 36        | 36      |
| Total                      | 182       | 605     | 605       | 605     |

## Wine grape production - Far North zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 0         | 0       | 0         | 0       |
| Cabernet sauvignon         | 156       | 154     | 154       | 154     |
| Malbec                     | 0         | 0       | 0         | 0       |
| Merlot                     | 87        | 75      | 75        | 75      |
| Petit verdot               | 12        | 24      | 24        | 24      |
| Pinot noir                 | 0         | 0       | 0         | 0       |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 1 038     | 1 204   | 1 212     | 1 212   |
| Total                      | 1 295     | 1 459   | 1 467     | 1 467   |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 0         | 0       | 0         | 0       |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 0         | 0       | 0         | 0       |
| Riesling                   | 2         | 2       | 2         | 2       |
| Sauvignon blanc            | 0         | 0       | 0         | 0       |
| Semillon                   | 0         | 0       | 0         | 0       |
| Traminer                   | 0         | 0       | 0         | 0       |
| Verdelho                   | 0         | 0       | 0         | 0       |
| Total                      | 3         | 4       | 4         | 4       |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 3         | 3       | 3         | 3       |
| Mataro (Mourvedre)         | 0         | 0       | 0         | 0       |
| Total                      | 3         | 3       | 3         | 3       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 0         | 24      | 25        | 25      |
| <b>White</b>               |           |         |           |         |
| Total                      | 6         | 3       | 3         | 3       |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 1 298     | 1 487   | 1 495     | 1 495   |
| <b>White</b>               |           |         |           |         |
| Total                      | 10        | 7       | 7         | 7       |
| Total                      | 1 308     | 1 494   | 1 503     | 1 503   |

## Wine grape production - Greater Perth zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 10        | 11      | 12        | 12      |
| Cabernet sauvignon         | 308       | 381     | 382       | 389     |
| Malbec                     | 23        | 21      | 24        | 24      |
| Merlot                     | 112       | 109     | 128       | 128     |
| Petit verdot               | 6         | 5       | 5         | 6       |
| Pinot noir                 | 12        | 11      | 11        | 11      |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 1 086     | 1 268   | 1 273     | 1 280   |
| Total                      | 1 559     | 1 809   | 1 837     | 1 853   |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 995       | 1 512   | 1 532     | 1 554   |
| Chenin blanc               | 1 974     | 1 838   | 2 503     | 2 518   |
| Colombard                  | 1         | 1       | 1         | 1       |
| Muscadelle (Tokay)         | 147       | 162     | 177       | 177     |
| Pinot gris                 | 0         | 0       | 0         | 0       |
| Riesling                   | 5         | 5       | 6         | 6       |
| Sauvignon blanc            | 45        | 50      | 67        | 70      |
| Semillon                   | 253       | 273     | 293       | 293     |
| Traminer                   | 3         | 4       | 4         | 4       |
| Verdelho                   | 982       | 1 322   | 1 358     | 1 376   |
| Total                      | 4 408     | 5 171   | 5 945     | 6 003   |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 89        | 88      | 103       | 103     |
| Mataro (Mourvedre)         | 2         | 2       | 2         | 2       |
| Total                      | 91        | 90      | 105       | 106     |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 3         | 4       | 4         | 4       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 20        | 21      | 24        | 24      |
| Total                      | 23        | 26      | 28        | 28      |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 145       | 164     | 180       | 180     |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 356       | 496     | 508       | 514     |
| <b>White</b>               |           |         |           |         |
| Total                      | 61        | 67      | 80        | 83      |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 2 008     | 2 395   | 2 451     | 2 474   |
| <b>White</b>               |           |         |           |         |
| Total                      | 4 640     | 5 429   | 6 235     | 6 296   |
| Total                      | 6 648     | 7 825   | 8 687     | 8 771   |

## Wine grape production - South West Australia zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 313       | 413     | 348       | 351     |
| Cabernet sauvignon         | 9 300     | 11 722  | 11 684    | 11 888  |
| Malbec                     | 361       | 398     | 332       | 353     |
| Merlot                     | 5 802     | 7 573   | 5 938     | 5 977   |
| Petit verdot               | 120       | 167     | 135       | 137     |
| Pinot noir                 | 765       | 782     | 814       | 833     |
| Ruby cabernet              | 2         | 2       | 2         | 2       |
| Shiraz                     | 11 774    | 14 652  | 12 676    | 12 844  |
| Total                      | 28 440    | 35 713  | 31 933    | 32 389  |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 11 929    | 15 285  | 13 149    | 13 411  |
| Chenin blanc               | 951       | 1 851   | 1 082     | 1 085   |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 5         | 6       | 5         | 5       |
| Pinot gris                 | 0         | 0       | 0         | 0       |
| Riesling                   | 1 441     | 1 634   | 1 670     | 1 736   |
| Sauvignon blanc            | 8 533     | 12 557  | 11 285    | 11 750  |
| Semillon                   | 7 369     | 8 547   | 8 853     | 9 199   |
| Traminer                   | 5         | 8       | 10        | 10      |
| Verdelho                   | 979       | 1 270   | 1 135     | 1 168   |
| Total                      | 31 215    | 41 160  | 37 194    | 38 368  |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 85        | 105     | 83        | 101     |
| Mataro (Mourvedre)         | 14        | 19      | 14        | 17      |
| Total                      | 100       | 124     | 98        | 118     |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 12        | 12      | 12        | 12      |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 12        | 12      | 12        | 12      |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 10        | 10      | 10        | 10      |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 342       | 426     | 410       | 414     |
| <b>White</b>               |           |         |           |         |
| Total                      | 399       | 504     | 454       | 474     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 28 883    | 36 265  | 32 441    | 32 922  |
| <b>White</b>               |           |         |           |         |
| Total                      | 31 637    | 41 688  | 37 671    | 38 865  |
| Total                      | 60 521    | 77 953  | 70 113    | 71 788  |

## Wine grape production - other Western Australia zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 1         | 1       | 1         | 1       |
| Cabernet sauvignon         | 6         | 6       | 6         | 6       |
| Malbec                     | 0         | 0       | 0         | 0       |
| Merlot                     | 6         | 6       | 6         | 6       |
| Petit verdot               | 0         | 0       | 0         | 0       |
| Pinot noir                 | 3         | 3       | 3         | 3       |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 11        | 16      | 19        | 21      |
| Total                      | 29        | 35      | 38        | 40      |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 8         | 9       | 9         | 9       |
| Chenin blanc               | 10        | 10      | 10        | 10      |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 0         | 0       | 0         | 0       |
| Riesling                   | 4         | 3       | 3         | 3       |
| Sauvignon blanc            | 4         | 3       | 3         | 3       |
| Semillon                   | 2         | 2       | 2         | 2       |
| Traminer                   | 0         | 0       | 0         | 0       |
| Verdelho                   | 2         | 2       | 2         | 2       |
| Total                      | 31        | 31      | 31        | 31      |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 0         | 0       | 0         | 0       |
| Mataro (Mourvedre)         | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 7         | 98      | 108       | 129     |
| <b>White</b>               |           |         |           |         |
| Total                      | 320       | 371     | 371       | 371     |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 36        | 134     | 147       | 170     |
| <b>White</b>               |           |         |           |         |
| Total                      | 352       | 403     | 403       | 403     |
| Total                      | 388       | 538     | 551       | 574     |

## Wine grape production - Tasmania zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 5         | 6       | 6         | 6       |
| Cabernet sauvignon         | 103       | 113     | 119       | 122     |
| Malbec                     | 0         | 0       | 0         | 0       |
| Merlot                     | 74        | 80      | 117       | 117     |
| Petit verdot               | 0         | 0       | 0         | 0       |
| Pinot noir                 | 2 351     | 3 126   | 3 776     | 4 022   |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 5         | 25      | 51        | 51      |
| Total                      | 2 542     | 3 353   | 4 071     | 4 321   |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 1 273     | 1 649   | 1 972     | 2 114   |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 217       | 298     | 415       | 542     |
| Riesling                   | 426       | 587     | 713       | 770     |
| Sauvignon blanc            | 472       | 629     | 821       | 902     |
| Semillon                   | 0         | 0       | 0         | 0       |
| Traminer                   | 66        | 69      | 88        | 92      |
| Verdelho                   | 0         | 0       | 0         | 0       |
| Total                      | 2 456     | 3 234   | 4 011     | 4 423   |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 0         | 0       | 0         | 0       |
| Mataro (Mourvedre)         | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 54        | 66      | 98        | 98      |
| <b>White</b>               |           |         |           |         |
| Total                      | 15        | 17      | 33        | 34      |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 2 597     | 3 419   | 4 170     | 4 420   |
| <b>White</b>               |           |         |           |         |
| Total                      | 2 471     | 3 252   | 4 045     | 4 458   |
| Total                      | 5 069     | 6 671   | 8 216     | 8 878   |

Wine grape production - Australian Capital Territory zone

|                            | estimated |         | projected |         |
|----------------------------|-----------|---------|-----------|---------|
|                            | 2006-07   | 2007-08 | 2008-09   | 2009-10 |
| <b>Premium red</b>         |           |         |           |         |
| Cabernet franc             | 1         | 2       | 1         | 1       |
| Cabernet sauvignon         | 23        | 70      | 70        | 70      |
| Malbec                     | 0         | 0       | 0         | 0       |
| Merlot                     | 61        | 68      | 66        | 66      |
| Petit verdot               | 0         | 0       | 0         | 0       |
| Pinot noir                 | 60        | 58      | 48        | 48      |
| Ruby cabernet              | 0         | 0       | 0         | 0       |
| Shiraz                     | 54        | 170     | 174       | 177     |
| Total                      | 200       | 369     | 362       | 365     |
| <b>White</b>               |           |         |           |         |
| Chardonnay                 | 73        | 117     | 104       | 104     |
| Chenin blanc               | 0         | 0       | 0         | 0       |
| Colombard                  | 0         | 0       | 0         | 0       |
| Muscadelle (Tokay)         | 0         | 0       | 0         | 0       |
| Pinot gris                 | 57        | 82      | 68        | 68      |
| Riesling                   | 98        | 110     | 82        | 82      |
| Sauvignon blanc            | 30        | 41      | 33        | 33      |
| Semillon                   | 11        | 60      | 54        | 54      |
| Traminer                   | 0         | 0       | 0         | 0       |
| Verdelho                   | 78        | 94      | 84        | 84      |
| Total                      | 349       | 507     | 427       | 427     |
| <b>Non premium red</b>     |           |         |           |         |
| Grenache                   | 0         | 0       | 0         | 0       |
| Mataro (Mourvedre)         | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>White</b>               |           |         |           |         |
| Crouchen                   | 0         | 0       | 0         | 0       |
| Doradillo                  | 0         | 0       | 0         | 0       |
| Palomino                   | 0         | 0       | 0         | 0       |
| Trebbiano                  | 0         | 0       | 0         | 0       |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Multipurpose white</b>  |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>Minor varieties red</b> |           |         |           |         |
| Total                      | 9         | 11      | 11        | 12      |
| <b>White</b>               |           |         |           |         |
| Total                      | 0         | 0       | 0         | 0       |
| <b>All wine grapes red</b> |           |         |           |         |
| Total                      | 209       | 381     | 373       | 378     |
| <b>White</b>               |           |         |           |         |
| Total                      | 349       | 507     | 427       | 427     |
| Total                      | 559       | 889     | 800       | 805     |

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