



The United Grower

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Regional briefings on industry over-supply get under way



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Following the release of the joint statement on the wine industry's over-supply by Australia's four national wine bodies - Wine Grape Growers' Australia, Winemakers' Federation of Australia, the Australian Wine and Brandy Corporation and the Grape and Wine Research and Development Corporation - on 10 November, the rollout of the regional data to the various state wine industry associations is now under way. These are detailed and confidential supply data summaries that examine each region's production profile focussing on levels and patterns of viability. In many cases, the data is not very palatable, with some regions implicated in the production of quite high volumes of uneconomic winegrape and wine production. However, growers should resist the temptation to shoot the messenger. It is clear that

we have a very significant and chronic over-supply problem that growers need to come to grips with to enable them to assess where their enterprises fit within the current and future supply-demand context. To assist with addressing the over-supply, WGGA and WFA agreed that from early this year they would undertake joint briefings in at least 14 regional wine industry centres across Australia to discuss the regional data and related issues and offer business stress testing to assist growers and wineries in deciding whether they have a viable future in the industry. Whilst WGGA has already held briefings with a number of regional associations, the joint WFA/WGGA briefings won't begin in earnest until pre-vintage for some regions and post-vintage for most regions. These regional presentations will expose growers to the financial

assessment tools available to them – including VineBiz and an upgraded version of the WineSkills financial tool provided for wineries by WFA – and advise them of the one-on-one support services that they can access to help them consider their financial position. Although the people delivering the presentations were still being finalised at the time this newsletter was going to print, they are likely to include a range of speakers including senior staff and management of WGGGA, WFA and AWBC.

WGGGA and WFA are continuing to engage with State Governments in a number of areas where we believe they are well-positioned to provide assistance with the wine industry's restructure process. For example, we believe State Government's could assist in compiling and distributing exit surveys to growers and wineries that would allow the industry to track the response to the Wine (Industry) Restructure Action Agenda and gauge what progress is being made in reducing our production footprint. These exit surveys are vital to ensure that we get an adequate correction in our production footprint to bring supply and demand back into balance, but also avoid over-correction.

State Governments have traditionally been significant providers of one-on-one financial planning services, usually in league with the Commonwealth Government, so we are also discussing with them what they may be able to provide in this regard for growers and wineries to tap into. This will be vital in giving each vineyard enterprise the opportunity to further explore their future options with a financial adviser based on the first run of their information through the VineBiz program. We are also negotiating with State departments of primary industries and agriculture that have traditionally

been best-placed to advise producers about alternative land use in the event that removal of vineyard is the final option decided on. WGGGA's aim is to ensure that as much support as possible is in place to assist growers in assessing their financial position and advising them on alternative business models.

We hope to be in a better position to reveal the outcomes of our negotiations with both State and Commonwealth Governments early this year. WFA and WGGGA met with Federal Minister for Agriculture Tony Burke on 7 December, and continued to emphasise the need for viable avenues to exit for growers. The Minister reiterated that the Government is not in the business of sponsoring vine pulls and that such decisions need to be made by the industry and, more particularly, individual grapegrowing enterprises. Therefore, while WGGGA and WFA will formally submit a plan to the Federal Government regarding Grower Exit Packages, growers should not hold out for a Government-funded vine pull package because it's not going to materialise. From discussions to date it is apparent that the Government is focussed on providing a framework that supports growers who decide they are no longer viable to leave the industry (utilising the existing Farm Exit provisions) or transform their businesses into more viable and sustainable businesses, through other Government assistance programs.

The next round of discussions with the Government was due to occur in early January, ahead of a Government decision on the form of any Grower Exit Package by early February. Whilst we will continue to advocate on behalf of the grower community for exit packages appropriate to growers' circumstances, we believe the Federal Government will only act on them so long as they broadly fit within its plans

for reshaping the existing drought and farm assistance packages. In that context, it is unlikely that the Government will consider a one-off wine industry specific assistance package.

Growers are urged to attend the WRAA regional presentations being held in their local area over the next few months so that they can assess how much of their fruit may be uneconomic, learn of the tools that can assess their financial position and, finally, be made aware of the various Government support programs available to help them assess whether their enterprises can be made viable and sustainable. Growers will then be in a good position to make a well-informed decision about whether they can continue to operate a viable business or tap into Farm Exit Packages and leave the industry.

THE POWER OF VINEBIZ

A key component of the support programs being made available under the Wine (Industry) Restructure Action Agenda is VineBiz. Readers of this newsletter would already be familiar with VineBiz, which was the subject of several pilot workshops that were held over the last 18 months in the Riverland, Murray Valley, Barossa Valley, Cowra, Wangaratta with additional VineBiz workshops conducted in the last quarter of 2009 in Griffith, Mildura and Margaret River.

The centrepiece of VineBiz is an Excel-based financial ready reckoner that allows growers to perform an analysis of the gross margin return by block, variety and over their entire enterprise by inputting the area of grapes they grow by variety, the tonnages harvested and the prices obtained against the cost data for the whole vineyard. In short, it determines which parts of a grape growing enterprise are making money and which parts are not. In doing so,



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growers who are looking at cutting costs can identify which parts of the operation they should nurture and which parts they could consider applying minimal inputs to, removing or restructuring.

VineBiz also gives growers the option of generating a range of performance ratios which can let them see the impact of restructuring their vineyard on their future revenue and cost base.

There is also a Growers' Guide which explores nine alternative business models that grapegrowing enterprises can consider.

In simple terms, VineBiz allows growers to assess how their enterprises are performing financially and identify where they could potentially improve the profitability of their operations block by block. If, after doing these analyses, it does not seem likely that growers can improve their bottom line, then they can start exploring the alternative business models to determine whether that will improve their position and whether their business is sustainable.

The VineBiz CD-ROM and Growers' Guide are available to WGGGA members for \$50 (plus GST and \$5 postage and handling) and \$100 (plus GST and \$5 postage and handling) for non-members. It is available through WGGGA's Secretariat or, alternatively, WGGGA can organise regional VineBiz workshops – one of which is being held in South Australia's Limestone Coast in early 2010. WGGGA is currently registering VineBiz FarmReady Reimbursement Grant eligibility which would mean the cost of the program and attending the associated workshop would be fully reimbursed by the Federal Government.

NEW WGGGA OPERATING PLAN

The WGGGA board has approved a revised WGGGA annual operational plan for 2009-10 which, in addition to maintaining our overall role in representing growers



The main menu of the VineBiz financial ready reckoner.

at the national level, comprises the following six objectives:

- Effective government and industry advocacy regarding the Wine (Industry) Restructure Action Agenda (WRAA). This is the organisation's biggest priority over the next 12-18 months.
- The extension of the Code of Conduct. WGGGA has set a target of achieving 85% coverage of the purchased winegrape crush in 2010 by 30 June, and 60 wine producer codesignatories. We have set ourselves a fairly high bar, considering a number of the major wine companies are already signatories, but both WGGGA and WFA believe we have to keep pushing for greater Code adoption. The latest signatories are Balnaves of Coonawarra and Henry Holmes Wines, in Barossa Valley.
- To deliver the VineBiz vineyard management tool to winegrape growers.
- To settle the financial and representational arrangements with the Rest of South Australia and Riverland zones and participate in the

SA Government inquiry into the SA Grape Growers Industry Fund.

- Extend the membership of WGGGA within the winegrape sector. Our aim is to have 60% of the grapegrowing sector as active members by the end of 2009-10. We have rolled out a number of joint and affiliate membership programs this year, including a new joint membership program with the Wine Industry Association of WA which has been successful and provided significant membership funding to WGGGA. The affiliate membership program has also been quite successful with affiliate membership already taken up by the Cowra Region Vineyard Association, King Valley Vignerons and the Margaret River Wine Industry Association. Responses have also begun to flow from a Direct Subscription Membership program with Riverina growers.
- To attract Government project grant funding. A lot of this funding over the next 12 months will be associated with the WRAA process but wherever possible WGGGA will look to acquire Government funding for other projects.



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NATIONAL VINEYARD REGISTER BACK ON THE TABLE

The establishment of a national vineyard register within the next three to five years is back on the agenda following in principal support by the executive management group (EMG) – comprising representatives of WGGA, WFA and AWBC – which has been looking into the collection of future viticultural statistics for the industry. Whilst the WGGA has long believed in the benefits of a national vineyard register, this has not been the case for WFA.

WGGA believes a national vineyard register would not only help in providing production data but could also be used for biosecurity management, in that knowing where all the nation's vineyards are located would allow for rapid communication to vineyard owners on biosecurity issues. A register would also support the soon-to-be-introduced changes to the AWBC's label integrity program (LIP) – a recording system that requires wine producers to provide an audit trail from grape purchase to finished product in support of their label claims. Whilst the LIP has to date only applied to wine producers, it is going to be progressively extended to grape producers. Therefore, if an AWBC LIP inspector wants to audit the source of grapes, they would go to the source vineyard to confirm whether the label claims with respect to the variety and vineyard location are true. In doing so, we have a system of label integrity that is transparent for our international customers and regulatory agencies. The best way to support such a program is to have a comprehensive national database of vineyards.

WFA has been reluctant to support a vineyard register to date as it has been concerned that it could be used as a means of controlling plantings along the lines of the *appellation contrôlée*

system in France. WGGA does not support such a system, nor would any current or future Government, as it is a barrier to market signals, structural adjustment and prevents flexibility in responding to changes in markets. In Europe, systems such as the *appellation contrôlée*, limits the vine varieties that can be planted and the sorts of wines that can be produced. In Australia, one of our great advantages is that we have the ability to produce multi-variety and multi-regional blends. Any system that seeks to apply limits on that flexibility would not be supported by Government and is not the policy of either WGGA or WFA.

However, WFA now acknowledges that the industry needs to be in control of its own industry statistics and not be reliant on Government or other agencies to collect that data. We are faced with a very significant restructuring agenda and can only understand our production profile fully if we've got a very detailed picture of what we've got in the ground – where it is, what it is and how much it produces.

Following the EMG's recommendation that a national vineyard register be explored, a detailed feasibility study and business plan will be developed over the coming months. The establishment of a national vineyard register is not a short-term proposition because there are currently significant differences in the ways the States manage the data on individual farms with quite major gaps in data in some wine production regions. So, there is still a lot of work to be done in terms of establishing the feasibility of a vineyard register and how much it would cost, but with all the national wine industry organisations now stating that it philosophically makes sense for the industry to establish one and be the principal collector of its own data, one of the final barriers in achieving a national vineyard database is now swept away.

NATIONAL VINE COLLECTION

At separate meetings in the first week of December, the boards of WGGA and WFA considered a joint proposal from CSIRO, SARDI and AVIA for the development of a national vine collection. The proposal is that the germplasm collections at CSIRO Merbein – which is in the process of being shifted to Koorlong Farm near Mildura – the SARDI vine collection in the Barossa Valley and the Australian Vine Improvement Association's high health collection of grapevine varieties at Dareton in NSW Murray Valley be brought under a single umbrella to create an Australian grapevine germplasm collection.

The proposal includes the appointment of a curator to manage the collection, who would be guided by a management committee comprising representatives of CSIRO, SARDI and industry.

It is fair to say that some members of the WGGA board continue to have some concerns about the value of national vine collection. However, others see that it is absolutely essential to ensure we maintain a broad range of vine germplasm as a part of biosecurity planning that can be drawn upon should we have a major biosecurity incident that would require significant replanting of vineyards; and preserve planting material that in the context of climate change may be worth reassessing for rootstock and scion combinations that tolerate heat, drought and salt.

The WGGA and WFA boards are dissecting the business proposal for the National Vine Collection, which the proposal estimates would cost around \$300,000 per annum to establish and run.

WINE INDUSTRY BIOSECURITY MATTERS

In early October, the GWRDC decided it would cease its funding of the National Vine Health Steering Committee (NVHSC) following a review into its



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future structure and funding requirements by NVHSC with input from WGGA and WFA – the bodies that are ultimately responsible for setting national policies with respect to biosecurity issues in the wine industry. Funded on an annual basis by the GWRDC, the NVHSC has been responsible for determining and implementing uniform national policies and programs on vine health since its inception in 1998. As a consultative group, it developed into quite a large committee comprising all the major stakeholders with an interest in grapevine health, including representatives of Federal and State Governments, the vine improvement sector, WGGA and WFA. GWRDC has been concerned that the funding of the NVHSC was a significant cost to the Corporation and needed to be streamlined in terms of its representation and focus. There were also concerns that there were representatives on the Committee from the dried vine fruit, table grapes and nursery sectors that weren't contributing to the funding of the operation of the Committee, leaving it solely to winegrape growers and winemakers to fund through their GWRDC R&D levies. The NVHSC will be replaced by a new streamlined national vine biosecurity committee (NVBC) which would provide advice to the WGGA and WFA boards on all biosecurity related issues, with both the peak industry bodies, the Australian Department of Agriculture, Fisheries and Forestry (DAFF), Plant Health Australia, and the State DPIs to be represented – with funding to be provided primarily by GWRDC on a more tightly defined agenda of biosecurity projects. The new structure also includes a new technical reference group (TRG) that will be convened from time to time on specific technical vine health/biosecurity issues, with the task of advising the new NVBC.

While WGGA regrets the discontinuation of the NVHSC and

acknowledges its work over more than a decade, given the current financial constraints on R&D levy funds and that the other vine sectors were not contributing to its funding, the GWRDC decision to discontinue NVHSC and set up a new national vine biosecurity committee is probably an appropriate way forward.

WGGA was expecting a formal proposal on the structures of the NVBC and TRG early this year.

QUALITY ASSESSMENT TOOLS UNDER SPOTLIGHT

As reported in the last issue of *The United Grower*, the wine industry relations committee (WIRC) reconvened on 18 November. The WIRC, a joint WGGA/WFA committee, acts as a forum for the industry to discuss issues such as the contractual relations and winegrape assessment between growers and wineries, with its major achievement in recent years being the development and finalisation of the Australian Wine Industry Code of Conduct.

At its November meeting, the WIRC examined the use of colour as a quality assessment tool by the wineries following concerns expressed by WGGA that there is not a standardised approach for the measurement of colour. The committee is liaising with the National Measurement Institute to look at colour measurement methodology to determine whether a standardised format for measuring grape colour can be adopted.

Another issue being examined by the WIRC is the downgrading or rejection of grapes on the basis of sodium and chloride levels which has been an increasing issue for the industry in recent years, particularly as a result of drought conditions and increasing reliance on saline water. As with the issue of colour measurement, WGGA would like a more harmonised approach amongst wineries with respect to the assessment of grapes for sodium

content, through establishing a standard minimum level. WGGA is taking a similar approach with the way grapes are graded for smoke taint and MRL levels from agrichemicals such as 2,4D. During the last vintage, a number of regions again had problems with spray drift from farms and issues with smoke effect have arisen in three States, but with a varied response from wineries over minimum smoke compound content.

Currently, these issues are not referred to in the publication *Winegrape Assessment in the Vineyard and the Winery*, which sits alongside the Code of Conduct. Once an improved method of measurement for each of these issues is determined, the publication will be updated to reflect the measurement methodology and minimum levels.

WFA LAUNCHES ENTWINE

WFA officially launched its voluntary national environmental assurance scheme, EntWine, on 7 December. The scheme is supported by WGGA which is a member of the Wine Industry National Environment Committee (WINEC) which developed EntWine.

Albeit, WGGA delayed the launch of EntWine for 12 months. Originally due to be launched just prior to the 2009 vintage, WGGA argued that the financial circumstances of growers would make the marketing of a accreditation system to industry extremely difficult, due to the additional compliance costs to growers. However, WGGA acknowledges that the international marketplace is increasingly requiring the Australian wine industry to demonstrate its environmental management credentials in relation to the products that it puts on shelves through retailers such as Tesco and Sainsbury's in the UK and Walmart in the US.

Given that membership of EntWine is \$100 per annum and requires the payment of \$450 every three years for an external audit to be completed, the



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Mark McKenzie with the Federal Minister for Agriculture, Fisheries and Forestry, Tony Burke (centre) and Winemakers' Federation of Australia chief executive Stephen Strachan in the Wine Discovery Journey exhibition at the National Wine Centre in Adelaide following the official launch of EntWine, the wine industry's voluntary national environmental assurance scheme.

timing of the launch of EntWine is a regrettable further cost to growers, but a very necessary one if growers are to remain suppliers to the largest export wineries in future years. WGGGA had argued for an accreditation system for which wineries could provide umbrella coverage to their supplying growers, but this was not seen as viable. Much of the EntWine program is focussed around energy, water and agrichemical usage and is based on the FreshCare program which the horticulture industry uses to measure its environmental performance.

It is hoped that, just like the use of spray diaries and the adoption of HACCP accreditation procedures by the grower community, once the EntWine program is set up, the time commitment that is required of growers will be minimal. The reality is that over the next five years, growers will find that accreditation under the EntWine system will inevitably become a condition of contract, as a part of larger

wine companies maintaining their market access. WGGGA believes that if the Australian wine industry is to continue to have open market access for its products in the international marketplace, and growers want the ability to supply as many wineries across Australia as possible, EntWine accreditation will be essential.

OUTCOMES OF DECEMBER SPECIAL GENERAL MEETING

WGGGA held a special general meeting on 3 December to consider constitutional changes and to pass the 2008-09 audited financial statement which wasn't completed by the auditor in time for the 27 August AGM, and was referred to the special general meeting by members at the AGM. The financial statements were passed, as were a number of amendments to the original constitution that guided the management of the association through its first interim period since 2006.

Among the major changes to the constitution to be passed was the formal recognition of the positions of deputy chair and treasurer; the addition of the affiliate membership category; and acknowledgement of the withdrawal of the Riverina Wine Grapes Marketing Board as the convening body for the Riverina in 2008 and the subsequent decision that the New South Wales Wine Industry Association be the convening body for both the Riverina, and the rest of NSW and Queensland zones.

The special general meeting also amended the constitution to allow for the circumstance that if a convening body for a particular zone fails to elect its own representative that the WGGGA board could appoint a representative for that zone. This has relevance to the situation in the Riverland which is currently unrepresented following the formal resignation of the Riverland Winegrape Growers' Association as the convening body for the region.

The meeting also agreed to give WGGGA the option of electing a chair from amongst the membership of its executive committee as well as an independent chair. While the WGGGA board is strongly in favour of having an independent chair, if the financial circumstances of the association are tight, it gives the board the option of electing someone from within the organisation. At the time this newsletter went to print, the board had yet to decide on which course of action it would take with respect to appointing a chair. Alan Newton, who is currently WGGGA's independent chairman, has agreed to remain in the role until the inquiry into the application of the SA Grape Growers Industry Fund (which provides funds to both WGGGA and the Wine Grape Council of SA) is completed, the findings of which are expected to be handed to South Australia's Minister for Agriculture Paul Caica by the end of January.



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Family

Partner Cecelia; two Chesapeake Bay Retrievers, Odin and Amber.

Vineyard

18ac at Kuitpo, in the Adelaide Hills, South Australia

Varieties grown

Sauvignon Blanc and Chardonnay (20% of the Chardonnay was removed in spring 2009)

How long have you been growing winegrapes?

Since 1993.

How many wine companies do you work with and supply?

Fruit has been going to Haselgrove Wines, in McLaren Vale, since 2004. Also work with Foster's, Constellation, Battunga Hill, Chain of Ponds, Ilya, The Pawn, Mount Bera, Nova Vita and Penny's Hill.

Education/training

Bachelors and Masters in Horticultural Science, Massey University, New Zealand; Course 4 of Australian Rural Leadership Foundation; Rabobank Executive Development Program for Primary Producers.

Employment history in the wine industry

Tandou Limited 1992-2002; MRV Management/Rutherglen Estates, 2002-2003; Nepenthe Viticulture 2003-2007, berry2wine Pty Ltd 2007-present.

Past and current industry representation or memberships

Past: Lower Murray Darling River Management Board, Wine Grape Growers' Australia; Current: Adelaide Hills Wine Region Committee; Wine Grape Council of South Australia; Strategic Directions Group; Innovation Policy Committee.

What do you like to do in your spare time?

Fishing, hunting, enjoying good food and wine with friends, reading - mostly history and historic novels, and enjoying developing our own property.

When did you last have a holiday and where did you go?

Parents 50th wedding anniversary, Shanghai, Xi'an, and Beijing, China

How is the 2010 vintage shaping up for you compared with the last couple of years?

Full dams, high vigour, high downy pressure, set and crop load mixed - some good, Pinot and Sauvignon Blanc looking average. High uncertainty in fruit sales; this affects planning and many key event periods like winter pruning and shoot thinning have been passed without any winery input. But, know what are the right practices to implement. Next have to make decisions about green thinning and netting - difficult to plan with certainty. I consider that where I produce and help other people that growing the best fruit you can is the only long-term strategy to forge profitable long-term relationships. I am positive about renewed interest in Chardonnay.

Has the industry's current over-supply of winegrapes had any impact on your vineyard/s and how it is managed?

Yes. Chardonnay has gone into a single vineyard label for Haselgrove. Sales going forward have been reforecasted to a tighter selection of grapes. This has allowed Cecelia and I to remove rows that were once reds but grafted to Chardonnay last decade, and restructure some two tier to VSP by complete cordon removal. This reduced our total crop in 2009 and further reduction will occur in 2010. There are no plans to replant these areas yet. Marketers need a mention too; they have largely failed to meet forecast expectations and arrest the slide in falling sales and profitability, by either innovation or new markets. I do believe that many of them need to be more accountable and swifter action should have been taken before stock levels got out of control.

What has been the general response to the joint statement by the four national wine industry organisations on the nation's over-supply from growers you've spoken with recently?

It has been positive. Whilst confronting to some, it clearly outlines the scope of the issues and is staged to deliver the message further, refined down to specific regions. Readers should be well informed and able to make their own decisions. My short time in the industry has led me to believe that the trends have been overcompensated for or ignored at our peril in the past, such as too many old vineyards removed, too much unproven Merlot planted, too slow reaction to countering NZ Sauvignon Blanc building a \$300m business under our noses, etc. The statements that have been worked on for months are a great start. We now need to carefully monitor the changes and stay informed. I commend their leadership.

Can you offer any tips to growers for remaining viable in the industry in the future?

Take personal responsibility for issues where you can or have influence. Start by removing areas/varieties that are unviable, in the wrong place, difficult to manage, like weak growth near trees, poor or shallow soils, and unprotected frost risk zones. Target 15-20% less buds in winter pruning. Make your vineyard more even. In the absence of a contract it is difficult, but focus on growing the best fruit you can as efficiently as you can. I live by the creed instilled in me by Bob Smith (Tandou). In agriculture, it is all about timing. Do some serious planning, then get the timing right on activities and costs and rewards will flow.

If you weren't involved in the wine industry, what do you think you'd like to do?

Bull beef farmer or travelling food and wine critic.

If you were to invite three people to dinner to brainstorm the future of the Australian wine industry, who would you ask and why?

Max Schubert AM, for his singular sense of vision and purpose against adversity. It would be interesting to see what he thought of our progress in the last 15 years, and where we may have managed things better. He would bring an interesting wine too. Peter Hayes would have an insightful mix of Australian and global issues. Jancis Robinson, well travelled and well schooled. I still believe though, no matter where this dinner conversation leads, individual choices by vineyard owners/managers and wine companies to make hard decisions will have the first required impact.

As part of its revised annual operational plan for 2009-10, WGGA is aiming to have 60% of the grapegrowing sector as active members by the end of the current financial year. Why do you feel it is important to be a member of WGGA?

Growers' and winemakers' main agenda is all currently national and global issues. There are some big ticket items to tackle, like a national vineyard register, improved communication, plant health issues, industrial relations and tax reform. This requires a much bigger budget than WGGA currently has, and broader membership gives both that and improved equity and balance to discussions and strategies at the national level. We also need a strong national organisation to work with WFA.



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[^] Rear axle width, flange to flange
* Engine horsepower (ISO) 97/68 EC Standards