



Wine
Australia



One Grape & Wine Sector Plan

New South Wales
State Progress Report Meeting



Progress and achievements



Balance supply and demand

Plan objective: Determine the true demand position and future-proof Australia's production base.

Australian Grape & Wine has:

- **Advocating for fair and transparent competitive arrangements along the value chain:** Australian Grape & Wine has supported recommendations for government intervention to address structural oversupply in the wine sector. This includes advocating for sensible and balanced policy to ensure commercial dealings are fair and transparent right along the value chain, and calling for greater support for growers who may wish to exit the sector, or transition to other crops in a sustainable way.
- **Been involved in Resolving Competition Issues:** Australian Grape & Wine has been involved in a series of consultations regarding National Competition Policy, with the recent announcement of legislative reform relating to unfair trading practices being a welcomed outcome.
- **Secured \$3.5 million of Australian Government funding for Wine Australia:** Through Australian Grape & Wine's advocacy efforts, the Department of Agriculture, Fisheries and Forestry (DAFF) allocated \$3.5 million to Wine Australia to support initiatives aimed at balancing supply and demand within the wine industry.

Wine Australia has:

- **Started developing a National Vineyard Register:** including a review of existing agricultural databases and registers for comparison, and consultation across the sector to understand what the Register needs to provide. The Register is now in the design phase, with the draft framework on track to be delivered by June 2025.
- **Appointed Dr Craig Emerson to lead an impact analysis of fair trading:** the Emerson report will provide analysis and recommendations of options to improve fair trading, competitive relationships and contracting practices in the wine and grape market. It is expected to be published by DAFF before the end of June 2025.
- **Developed and released a Grape Production Cost Calculator:** to provide an estimate of the costs of grape production in the inland wine regions, based on averages for a region, vineyard size and business model. The calculator can be used to estimate ballpark costs, model different yield scenarios, calculate profitability and for general research purposes.

NSW Wine has/is focused on:

- **Supportive of national-led policy:** NSW Wine is highly supportive and engaged with AG&W's advocacy efforts and budget submissions, the vineyard register program and efforts to address fair trading and competition.
- **Grape Production Calculator:** NSW Wine co-funded (with Wine Australia and Riverina Winemakers) a Grape Production Calculator for in-land growers to better understand their inputs and profitability.
- **Markets:** NSW Wine is highly active in funding, developing and supporting initiatives that grow wine markets for NSW producers both domestically and internationally.



Diversify and intensify our international markets

Plan objective: Engage global markets to increase demand for Australian wine

Australian Grape & Wine has:

- **Developed a Trade and Market Access Strategy:** Australian Grape & Wine has developed and maintained the industry's Trade & Market Access Strategy which aims to ensure that the Australian grape and wine sector is equipped to respond to customer demand in export markets, by reducing trade barriers and realising substantial and meaningful improvements in market access around the globe.
- **Participated in international collaboration:** Australian Grape & Wine has been leading efforts to collaborate with international partners and forums to improve trade and encourage broader regulatory harmonisation. This has included engagement with India, the World Wine Trade Group (WWTG) and the International Organisation of Vine and Wine (OIV).
- **Advocated for Free Trade Agreements (FTAs):** Australian Grape & Wine has continued to advocate to the Australian Government on the wine industry's interests in its Free Trade Agreement negotiations.
- **Established a Market Diversification Framework:** Under Australian Grape & Wine's previous grant funding, we established a Market Diversification Framework to support diversification and growth efforts. Under this framework, we have successfully supported government investment in our sector to deliver wine specific country managers through Wine Australia in South Korea, Japan and Vietnam as well as further investment in domestic marketing and tourism.

Wine Australia has:

- **Continued to provide market insights on all established and emerging markets:** through regular communication including sector-wide data and reports, and fortnightly Market Bulletins on market trends and insights. Analysts have presented at events, webinars, workshops and seminars for the sector to provide relevant and targeted information to help inform decision making. The Market Explorer Dashboard has been updated to provide extensive international market data.
- **Engaged with the sector to inform market development through the Joint Marketing Group (JMG):** sought input from large, medium and small winemaker representatives, regional representatives and an independent chair, who advise on Wine Australia's planned marketing and promotional activities.
- **Met regularly with the Consumer Insights Advisory Group (CIAG):** A collaborative approach between Wine Australia and Australian wine companies to help establish and provide advice on consumer research priorities and projects, the CIAG is helping develop a research program to provide consumer insights that help Australian wine producers better understand consumer attitudes towards, and usage of, wine, including different styles that may align to different need consumer states and groups.
- **Driven progress in mid-strength product innovation:** Wine Australia has commissioned quantitative and qualitative research to build and scale the market for Australian mid-strength wine across key markets by identifying the most profitable and scalable consumer segments and proposition ideas, and is investing in research on alternative methods to de-alcoholisation for mid-strength wine production.
- **Participated in international collaboration:** working closely with Australian Grape & Wine, Australian Wine Research Institute and Department of Agriculture, Fisheries and Forestry to facilitate and improve trade and market access for Australian wine exporters, including the World Wine Trade Group (WWTG), International Organisation of Vine and Wine (OIV) and FIVS.

- **Promoted Australian Wine in emerging and established markets:** including Australian Wine events such as the China Roadshow, Nordics Roadshow, North American Roadshow, Southeast Asia Roadshow, Australia and New Zealand Trade Tasting UK/Ireland, and a significant Australian Wine presence at key international trade exhibitions ProWine Shanghai, Vinexpo Paris and TEXSOM. We have also collaborated with other Australian food sectors, with the Australian Food & Wine Collaboration Group participating in activations in Taiwan and Japan, thanks to government funding secured through Australian Grape & Wine.
- **Showcased the quality and diversity of Australian Wine:** by hosting leading trade delegates from US, UK, Canada, Brazil, Japan, Korea, Sweden and Netherlands in Australia and connecting them to the people, stories and histories of our regions and wines.

NSW Wine has/is focused on:

- **Market priorities:** NSW Wine has identified 6 priority markets (UK, US, China, Japan, South Korea and Vietnam) to drive our international engagement
- **Funding:** NSW Wine and Investment NSW have co-delivered \$1 million of export programs in China, Japan and Vietnam in FY25
- **Partnerships:** NSW Wine works closely with Investment NSW both onshore and offshore to ensure wine is included in all export activities where the NSW wine industry has identified a priority market



Grow our domestic market

Plan objective: Support wineries to grow opportunities in the domestic wine market.

Australian Grape & Wine has:

- **Ensured an industry voice in the Joint Marketing Group:** Australian Grape & Wine actively participates in the Joint Marketing Group, ensuring that industry perspectives are represented in domestic marketing discussions. Through strategic advocacy, Australian Grape & Wine works with Wine Australia in the decision-making processes to shape marketing initiatives and deliver outcomes that align with the sector's needs, supporting long-term growth in the domestic market.
- **Collaborated with Airbnb on "Hidden Vines" Campaign:** Australian Grape & Wine is working with Airbnb on the "Hidden Vines" campaign to promote domestic wine tourism by showcasing 12 lesser-known wine regions across Australia. To maximise impact, Australian Grape & Wine is coordinating with State & Regional Associations and anticipates a significant boost in regional wine tourism and cellar door sales.

Wine Australia has:

- **Planned a domestic marketing campaign for August 2025:** The campaign is an 'open-access' initiative inviting events and activities across Australia, amplifying the campaign, profiling regions and building a compelling and diverse offering of Australian wine-related activity. Businesses will be able to customise the assets and tools that Wine Australia develops from June onwards, to bring the campaign to life across multiple retailers, channels, and regions across Australia.
- **Developed a domestic market dashboard:** as part of a series of projects aimed at improving market transparency, the new domestic dashboard will be launched by end June 2025 and contains interactive, always-on access to market and consumer data.

NSW Wine has/is focused on:

- **'Buy Local':** Through its advocacy, NSW Wine continues to make positive strides for a NSW Government 'Buy Local' wine policy

- **Greater Sydney trade:** NSW Wine runs a 12-month trade tasting, masterclass and awards program to promote NSW wines to Greater Sydney trade including in-region activations
- **Consumer demand:** NSW Wine runs a 12-month consumer event program to showcase and raise the profile of local wines
- **Awards:** NSW Wine hosts both the NSW Wine Show and the Sommelier Wine List Awards
- **Partnerships:** NSW Wine has partnerships with Destination NSW, The Rocks, Vivid and Carriageworks to deliver consumer events
- **Events:** Sydney Cellar Door, NSW Wine @ Vivid, NSW Wine Cellar Door, NSW Wine @ Carriageworks and NSW Wine Month



Embrace sustainability

Plan objective: Improve access to Sustainable Winegrowing Australia

Australian Grape & Wine has:

- **Supported the Adoption of Sustainable Winegrowing Australia:** Australian Grape & Wine has supported the adoption of Sustainable Winegrowing Australia, a program that provides a framework for environmental best practices.
- **Implemented Environmental Stewardship Initiatives:** Australian Grape & Wine has implemented initiatives to reduce the carbon footprint of wine production, including energy efficiency programs and waste reduction strategies.
- **Accessed an Emissions Traceability Grant:** Australian Grape & Wine was successful in a grant application for a project 'Tracing Carbon Emissions in an International Wine Industry Value Chain between Australia and Singapore'. The project will see the development of a comprehensive carbon emissions tracking system and data-sharing platform aimed at enhancing provenance and building trust in Australian exports.

Wine Australia has:

- **Promoted the success and value of Sustainable Winegrowing Australia (SWA):** including to international trade and consumers, by promoting SWA as a key point of difference to market competitors at in-market events in UK, Europe, US, Japan.
- **Reviewed SWA against global competitor programs:** engaged international retailers, National Farmers Federation and the Sustainable Wine Roundtable (SWR) to ensure that SWA meets current market requirements and sustainability frameworks, is fit-for-purpose and responsive to rapidly evolving ESG obligations. This includes a review of SWA against seven other wine sustainability standards and the SWR Global Reference Framework.
- **Progressed sustainable solutions for disposal of CCA-treated vineyard posts:** including investment in the Timber Circularity Project to determine regional volume and mass of CCA posts, regulatory and logistical barriers to collection, reuse and end-of-life processing. Pilots to demonstrate end-of-life processing options are being developed. Other initiatives include an investigation to examine the feasibility of regional collection sites, a product stewardship model for end-of-life management of CCA treated timber, and a 'store safely' campaign.
- **Supported the development of low emissions alternative packaging options:** by securing \$600,000 in funding through the Federal Government Business Research and Innovation Initiative (BRII) grants – Renewables and Low Emissions Round. Six companies have been awarded grants to test their innovative packaging solutions for premium Australian wine, with a further \$1 million available in FY25/26 for up to two grant recipients each in FY26 to take their products to market.

- **Secured Federal Government grant funding for emissions management:** to explore gaps in grower and winemaker understanding of emissions management across the sector and opportunities to co-invest in cross-agricultural emissions management solutions.
- **Provided ESG education for the sector:** including workshops and presentations on measurement and reduction of greenhouse gas emissions
- **Designed resources to help businesses be more sustainable:** including the update of the AWRI Australian Carbon Calculator, to help producers measure emissions data with calculations from the Environmental Accounting Platform (EAP); sustainability communications and reporting guides to help businesses respond to retailer requests for information and promote their sustainability credentials; and an ESG Readiness Tool, helping producers to understand ESG topics and the evidence and reporting needs relevant to their business. All resources will be available by July 2025.
- **Co-investment with regional associations:** to drive the uptake of SWA and achieve regional program priorities.

NSW Wine has/is focused on:

- **Extension:** NSW Wine, through DPI and its wine extension officers, delivers the NSW + ACT Regional Program across the state
- **R&D:** NSW Wine is guided by its RDE&A Prospectus (2021) which is due to be updated in FY26
- **Container Deposit Scheme:** NSW Wine coordinating with AG&W and other states on any expansion to the CDS and national scheme harmony.
- **SWA:** NSW Wine has supported the adoption of SWA through funding, workshops and training
- **Corporate partners:** Through its energy corporate partner NSW promotes and supports the transition to renewables where applicable
- **Rootlings:** Understanding that the next generation will drive even more changes in the industry, NSW Wine is highly engaged with our under-40 farmers and winemakers and ensures there are 'Rootling' opportunities and streams through all our educational, workforce development and practical initiatives that support a more sustainable wine industry.



Defend wine's social licence

Plan objective: Defend wine's social licence in public health debate with anti-alcohol lobby

Australian Grape & Wine has:

- **Alcohol and health working group:** Alcohol and Beverage Australia (ABA) has established a new Alcohol and Health Working Group, with Australian Grape & Wine as an active member. The group will initially focus on health warning labels and draw on international resources, such as those from the International Alliance for Responsible Drinking (IARD). Its work will include developing a comprehensive evidence base—covering health, economic, and social dimensions—reviewing international approaches, identifying key risks, and preparing for the possibility of rapid policy shifts by government. The group will also collate and analyse scientific evidence, highlight weaknesses in opposing arguments, and engage supportive experts. Additional research may be commissioned to strengthen the industry's position, which will then inform AGW's strategic approach and communications.
- **Talking point toolkit:** Australian Grape & Wine is working with Alcohol Beverages Australia (ABA) to develop a talking point toolkit containing resources for members regarding alcohol and health.

- **Parliamentary Friends of Viticulture:** Australian Grape & Wine actively engages with the Parliamentary Friends of Viticulture group as a valuable forum to defend and strengthen the wine sector's social licence. By bringing together Members of Parliament in a more relaxed and informal setting, we're able to have constructive conversations about the industry's initiatives, including sustainability, responsible consumption, regional economic contributions, and export growth. These engagements help build understanding and support across the political spectrum, reinforcing the value of the Australian wine sector to communities and the nation.
- **Responsible Marketing & Promotion of ABAC:** Australian Grape & Wine actively promotes the Alcohol Beverages Advertising Code (ABAC) to ensure industry compliance and uphold responsible marketing standards. Through collaboration with ABAC, Australian Grape & Wine educates members on best practices, reinforcing the importance of ethical promotion and responsible alcohol advertising.
- **Collaboration with DrinkWise – 'Stay Tasteful While Tasting' Campaign:** Australian Grape & Wine has partnered with DrinkWise to promote responsible consumption through the 'Stay Tasteful While Tasting' initiative. This campaign encourages moderation and responsible behaviour at wine tastings and cellar doors, reinforcing positive industry messaging.
- **Industry Engagement:** Australian Grape & Wine has engaged with regional wine communities to highlight the cultural and economic contributions of the wine industry, fostering positive relationships and trust. As part of these efforts, Australian Grape & Wine delivered essential information on social licence at the Finlaysons Wine Roadshow, underscoring our advocacy and industry actions to combat anti-alcohol rhetoric and protect the sector's reputation.

NSW Wine has/is focused on:

- **NSW Parliament Friends of Grape Growers:** Through its NSW Parliament Friends of Grape Growers, NSW Wine can engage across governments and promote our wine's positive role in regional communities, in tourism, our transition to becoming a more sustainable industry and other issues that support our social licence.
- **Promotions:** NSW Wine social media promotes responsible wine consumption and an inclusive wine industry.
- **Low and no alcohol:** NSW Wine promotes low and no alcohol products through its trade tastings and consume events like Sydney Cellar Door.



Fit for purpose levy system

Plan objective: Ensure that the sector's national funding models are fit for purpose

Australian Grape & Wine has:

- **Initiated a Levy System Review:** Australian Grape & Wine has initiated a comprehensive review of the existing levy system, consulting with stakeholders to ensure it supports industry growth and sustainability.
- **Advocated for the scrapping of the Biosecurity Protection Levy:** Australian Grape & Wine's strong advocacy and lobbying efforts, in conjunction with other agriculture sector bodies, helped deliver a significant win for the wine sector, with the Federal Government abandoning its proposed Biosecurity Protection Levy. We worked tirelessly to ensure the voices of grape growers and winemakers were heard, highlighting the unfair burden the levy would have placed on our industry.

NSW Wine has/is focused on:

- **Supportive of national-led policy:** NSW Wine is supportive of AG&W's review into the levy system and advocacy efforts.

New South Wales

Crush



Share of Australian
crush by volume

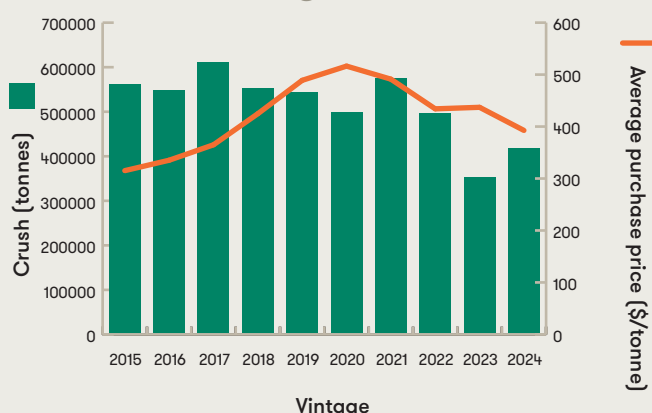
29%



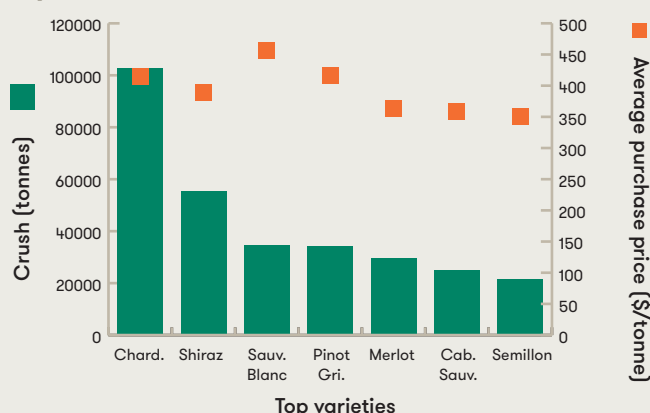
Share of Australian
crush by value

17%

Tonnes and average value



Top varieties in 2024



Exports

12 months ended March 2025,
based on regional label claims:
New South Wales

Total value	\$24m	▲ 35%
Total volume	10m litres	▲ 12%
Average value	\$2.40/litre	▲ 21%

Price point by value

\$15.00 +	\$5.1m	▲ 156%
\$10.00-\$14.99	\$2.4m	▲ 61%
\$7.50-\$9.99	\$1.8m	▼ -9%
\$5.00-\$7.49	\$2.6m	▲ 28%
< \$5.00	\$11.7m	▲ 18%

Top 5 markets by value

	United Kingdom	\$6.6m	▲ 47%
	Mainland China	\$4.6m	▲ ++
	Japan	\$2.3m	▲ 27%
	Belgium	\$1.7m	▲ 0%
	New Zealand	\$1.1m	▲ 33%

Exports

12 months ended March 2025,
based on regional label claims:
South East Australia

Total value	\$721m	▼ -4%
Total volume	423m litres	▼ -9%
Average value	\$1.70/litre	▲ 5%

Price point by value

\$15.00 +	\$1.2m	▲ 23%
\$10.00-\$14.99	\$3.0m	▲ 111%
\$7.50-\$9.99	\$20.1m	▲ 42%
\$5.00-\$7.49	\$32.4m	▲ 8%
< \$5.00	\$664.3m	▼ -6%

Top 5 markets by value

	United States	\$255.2m	▼ -10%
	United Kingdom	\$222.8m	▼ -8%
	Canada	\$65.2m	▼ -5%
	Mainland China	\$24.7m	▲ ++
	Germany	\$18.9m	▼ -12%