



Wine
Australia

Strategic Plan 2025–30

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Executive summary

Wine Australia empowers the success of the Australian grape and wine sector.

This Strategic Plan outlines how we will empower the success of the Australian grape and wine sector by investing the sector's levies and other fees, along with matched funding from the Australian Government for research and innovation. Funded by the sector, for the sector, these investments will help Australian grape and wine businesses become more profitable, resilient and sustainable.

Every five years, Wine Australia is required, by section 31 of the [Wine Australia Act 2013](#) (Wine Australia Act) to prepare a corporate plan for the following five-year period which must be approved by the Commonwealth Government's Minister for Agriculture, Fisheries and Forestry. Each plan must include:

- the principal objectives of Wine Australia
- the strategies and policies that are to be followed by Wine Australia in order to achieve those objectives
- the objectives and priorities of Wine Australia relating to grape or wine research and development
- the strategies and policies that are to be followed by Wine Australia in order to achieve those objectives and priorities, and
- details as to the market outlook and the economic outlook for the grape industry and the wine industry.

Since Wine Australia's last [Strategic Plan 2020–2025](#), the landscape has shifted significantly. The COVID-19 pandemic, natural disasters including bushfires and floods, the imposition (and eventual removal) of import duties by China, and oversupply exacerbated by declining consumption trends have all presented significant challenges – to name just a few.

Twelve months of extensive sector consultation in collaboration with Australian Grape & Wine (AGW) culminated in the launch of the [One Grape & Wine Sector Plan](#) (OGWSP) in August 2024. The OGWSP outlines the sector's collective priorities and the actions needed to help reset and rebound towards achieving [Vision 2050](#), where Australian wine is enjoyed and respected globally.

Addressing the challenges identified by Australia's grapegrowers, winemakers and exporters, the OGWSP sets out what actions Wine Australia (and other sector partners) will be responsible and accountable for over the next five years to drive success, increase resilience and support solutions to the complex problems facing the sector.

Hence, this Strategic Plan flows from and aligns with the OGWSP's six core themes:

- Our place and product
- Our markets
- Our consumers, customers and community
- Our sustainability
- Our people, and
- Our systems and infrastructure.

With a strong emphasis on leadership, collaboration, and accountability, this Strategic Plan provides clear actions and milestones for Wine Australia to ensure the sector can adapt, thrive, and achieve its long-term goals. For Wine Australia, success relies on continued engagement and listening across the sector, embracing innovation, and taking bold actions to secure the future of Australian wine.

The Australian wine sector

Australia has more than 200 years of viticultural history and grows more than 100 different varieties. With almost 150,000 hectares under vine, and an average annual grape production of 1.7 million tonnes making approximately 1.2 billion litres of wine, Australia is the world's fifth-largest grape wine producing country. Winegrapes are grown across the continent – from Margaret River in Western Australia to Hastings River in New South Wales, and from Tasmania to South Burnett in Queensland.

The Australian wine industry is a significant contributor to the national economy, with an estimated annual value of \$45 billion¹. Winegrape production accounts for nearly \$1 billion, while wine processing contributes approximately \$5 billion.

The industry provides economic benefits beyond its direct output, supporting jobs in agriculture, manufacturing and tourism. Over 160,000 people are employed in Australia's 65 wine-growing regions, including more than 6,000 winegrape growers and over 2,000 wine producers.

The sector is dominated by large businesses, with around 30 wineries accounting for at least 75 per cent of total Australian wine production. Almost 60 percent of Australian wine production is exported. This is a valuable industry, exporting more than \$2 billion worth of wine in 2023–24.

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¹ Full report available here: [Australian wine's economic contribution | Wine Australia](#)



The Australian wine sector at a glance

Grape and wine production

5th largest wine
producer in the world



Total vineyard area in Australia 2019	146,244 ha
South Australia (52%)	76,292 ha
New South Wales (24%)	34,641 ha
Victoria (15%)	22,151 ha
Western Australia (7%)	10,784 ha
Tasmania (1%)	1,702 ha
Queensland (0.5%)	674 ha
Total winegrape crush 2024 (estimated tonnes)	1.43 million tonnes
Chardonnay (23%)	332,643 tonnes
Shiraz (21%)	297,868 tonnes
Cabernet Sauvignon (11%)	153,644 tonnes
Sauvignon Blanc (6%)	89,120 tonnes
Merlot (5%)	75,560 tonnes
Total wine production 2023–24	1042 million litres
White (51%)	531 million litres
Red (49%)	511 million litres

Wine businesses 2023–24

Contribute over \$45.5 billion
annually to the Australian economy



Wine regions	65
Wineries	2156
Grapegrowers	approx. 6000
Employees (full and part-time)	163,790

Australian wine exports 2023–24

5th largest wine
exporter in the world



Total wine export value	\$2.19 billion
China mainland (18%)	\$400 million
USA (16%)	\$356 million
UK (16%)	\$353 million
Hong Kong (13%)	\$275 million
Canada (7%)	\$146 million
Total wine export volume	619 million litres
Red and rosé (55%)	343 million litres
White (42%)	263 million litres
Sparkling, carbonated, fortified (2%)	13 million litres

Domestic wine market 2023–24

12th largest wine
market by volume



Total domestic wine market	540 million litres
Australian wine (85%)	457 million litres
Imported wine (15%)	83 million litres

Top-selling Australian still wine varieties in off-trade market by value

Shiraz	21%
Sauvignon Blanc	11%
Chardonnay	10%
Cabernet Sauvignon	9%
Pinot Grigio	5%

Data sources: ABS, AgEcon Plus Consulting, Department of Agriculture, Water and Environment, Circana (IRI), IWSR and Wine Australia.

Market and economic outlook

Long-term decline in global wine consumption per capita

The global alcoholic drinks market, including wine, has been trending downward over the past decade. Per capita consumption has been declining in many markets as people have been moderating their alcohol intake, primarily due to health and wellness concerns, and more recently in response to cost-of-living pressures as many prioritise spending on essentials over alcoholic drinks.

Wine consumption has declined at a much faster rate than other alcoholic drinks in recent years. The pace of decline in wine consumption has accelerated since the start of the COVID-19 pandemic in 2020. Global wine consumption has fallen by 4 per cent per annum compared to other alcoholic drinks at 1 per cent. Prior to the pandemic both were declining at 1 per cent per annum. Per capita wine consumption is now a quarter less than it was 20 years ago, while other alcoholic drinks are at the same level.

Other categories, such as beer and spirits, have consistently innovated to remain relevant to consumers in a highly competitive market. The wine category globally has struggled to navigate through this changing environment and keep pace with its competitors in the alcohol space.

Some consumers are abstaining from drinking wine, others are drinking less but paying more per bottle, while some are seeking lower-alcohol wine options. Wine has become less of an everyday drink and more of an occasion-based drink. As a result, in many markets the number of wine drinkers has fallen and those who do drink wine are drinking less. Older consumers, who generally drink the most wine, especially in mature markets, are moderating their consumption for health and economic reasons, while younger consumers are not drinking as much alcohol – and particularly wine – as previous generations.

All of these factors have resulted in wine consumption falling at a greater rate than other alcoholic drinks across the globe.

Growth in premium wines more than offset by steady decline in commercial wines

There are differences in global wine consumption trends by price segment.

Wine consumption at premium price segments (US\$10 or more per bottle or equivalent in other markets) has grown, while consumption at the commercial/value end (less than US\$10 per bottle) has been declining. This is an indication that consumers are drinking less wine but choosing to increasingly purchase at higher price points, although this premium growth has slowed in the last couple of years due to cost-of-living pressures.

It is important to put the two price segments in context – commercial wines make up 84 per cent of the volume and 60 per cent of the value consumed globally and will remain the major segment of the market – but the segment is in steady decline.

These price segment trends disproportionately affect Australia, because commercial price segments comprise by far the largest share of Australian export volumes and Australia over-indexes in this segment. In the 2024 alone, 90 per cent of the volume of Australia's exports were at the commercial end.

Whilst premium wine sales are forecast to grow out to 2028, this will not offset the decline in commercial sales. In the next five years, commercial wine sales are forecast to decline globally by 117 million cases, while premium wine sales are forecast to grow by 18 million cases – less than 20 per cent of the decline in commercial volumes.

This indicates that the volume of wine consumption across the globe will continue to decline in the next five years, despite growth in the global population.

Three of the last five Australian vintages have been below average in size

Currently, around 60 per cent of the wine that Australia produces is exported. Therefore, global market trends significantly impact Australian wine producers and grapegrowers, both in terms of how much supply is required to support demand as well as the appropriate mix of varieties, wine styles and price points.

In the six years to 2020, Australia’s supply and demand of both red and white wine were relatively well-balanced, with stock-to-sales ratios at close to long-term average levels. However, a record crush in 2021, combined with tariffs imposed by mainland China on packaged Australian wine and falling global demand for wine saw Australian wine, especially red wine, move into a significant oversupply position. Since then, the size of the national winegrape crush has been reduced, most significantly in 2023 and 2024.

This has resulted in an improvement in the stocks-to-sales ratios. However, while white wine is now largely back in balance in 2024, the stock-to-sales ratio remains well above the long-term average in the case of reds.

In summary, the size of the wine market globally is shrinking and Australia, as one of the world’s largest wine producers, is not immune to this.

Red grape prices in the inland regions have been most impacted

While the tonnes crushed have been reduced for both red and white winegrapes in the past two vintages, the impact on grape purchase prices is very much dependent on both the region of origin and the grape colour. The red grape average purchase price has fallen by 7 per cent in the cool and temperate regions since 2020, but the drop in the prices in warm inland regions has been far more dramatic, falling by 55 per cent.

On the other hand, the average price paid for cool and temperate whites continues a long-term upward trend, reflecting stronger demand for premium whites. In contrast, after a period of growth, the prices paid for warm inland whites have eased down 5 per cent compared to 2020, reflecting that the demand is not as strong at the commercial end of the market for whites.

The reduction in the crush does not necessarily reflect a decrease in the underlying supply base. There is no indication that the vineyard area has declined significantly nationally. For example, in South Australia in the past three years, the total vineyard area has declined by less than 2 per cent while the total crush in the state has fallen by 33 per cent. This highlights that the reduced crush in the state is the result of active yield management and, to a lesser extent, seasonal conditions, rather than reduced vineyard area.

This suggests that the potential for a large national crush still exists.

Premium wine re-entering mainland China drives overall export value increase in 2023–24

Global market trends and trading conditions are impacting Australia’s wine exports. In 2023–24, Australian wine was exported to 115 destinations. Exports increased in value by 17 per cent to \$2.2 billion, the highest level since the 12 months ended September 2021. Volume exported was relatively stable at close to 620 million litres.

The growth in value was due to a surge in exports to mainland China which came in the last three months of the 2023–24 financial year, following the removal of the duties on Australian bottled wine in March 2024. Exports to mainland China grew by \$392 million to reach \$400 million for the year. Volume grew by 32 million litres to 33 million litres. Wines priced at \$20 or more per litre FOB were the main driver of the value growth while the volume growth came in the same price segment as well as in bulk exports below \$1 per litre².

Exports to the rest of the world (excluding mainland China) declined by around 5 per cent, with the volume falling to the lowest level since 2003–04. Exports have also been impacted by enduring problems in shipping, with a shortage of ships globally and freight and charter rates on the rise.

Australia is not the only country negatively impacted by the tough trading conditions. For example, globally, wine exports from Spain, France, Chile, South Africa, Germany and New Zealand have also declined.

2 A Free on Board (FOB) price/value is a price/value that includes all costs up to being lifted onto a ship.

Wine Australia's role

Wine Australia's core functions, defined by the [Wine Australia Act 2013](#) (the Wine Australia Act), exist to better the knowledge, opportunities and excellence of the sector's people, processes and products so that levy payers can remain profitable, resilient and sustainable. These core functions are:

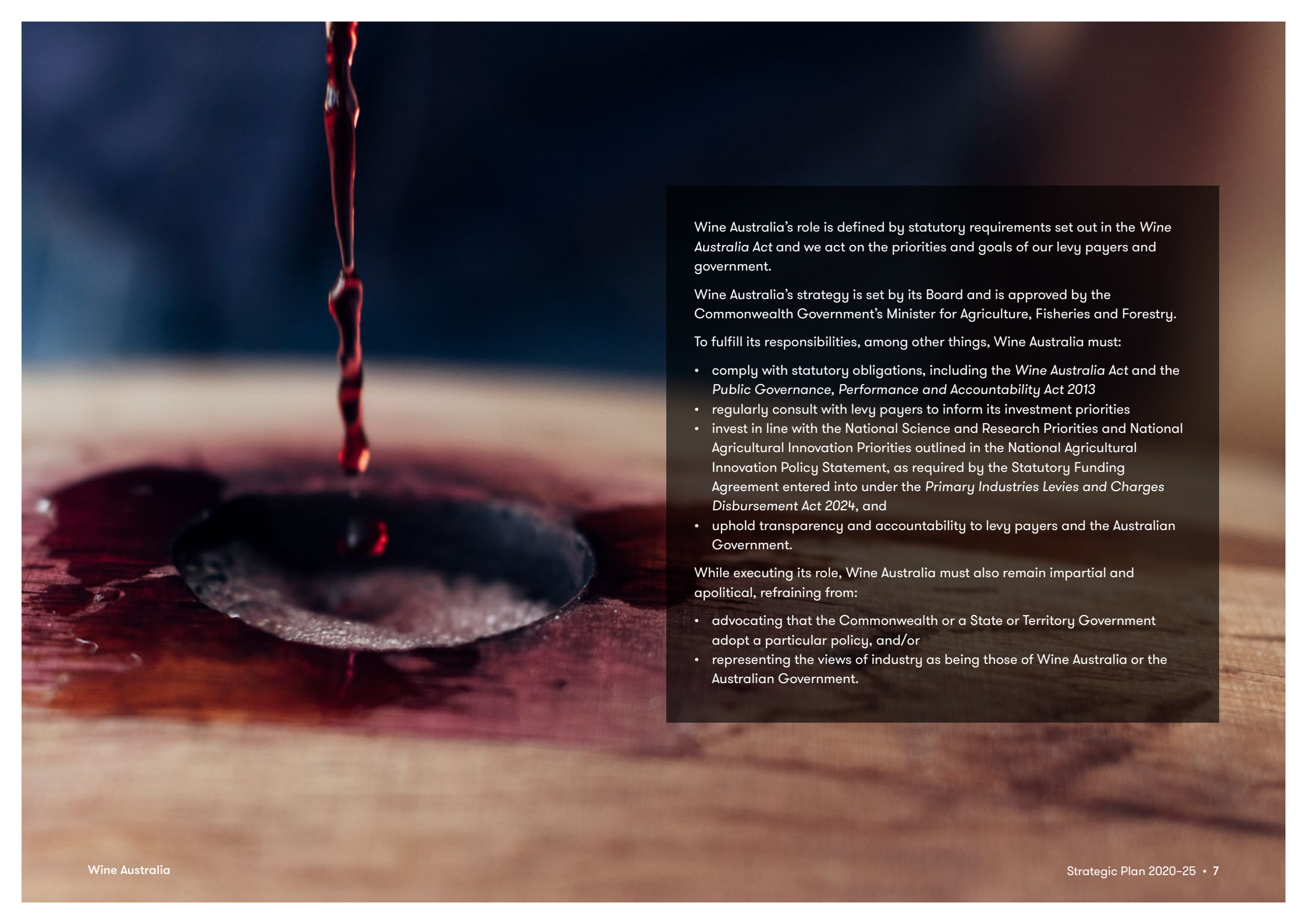
- **Research, Innovation and Adoption** to enhance global competitiveness, helping grape and wine businesses meet the challenges of tomorrow, today
- **Market Development** to increase the demand and premium paid for Australian wine across all markets by expanding market and promotion opportunities for Australian wine, and
- **Regulatory Services** to safeguard product integrity and uphold the sector's reputation by maintaining market confidence in the high standards expected of Australian wine.

In both times of prosperity and the more challenging times, such as the one the sector is currently navigating, we continue to innovate, diversify and safeguard the sector for the betterment of the Australian wine sector and its people.

In 2020, the Australian grape and wine sector united to chart a course toward a profitable, productive, resilient, and sustainable long-term future, encapsulated in the [Vision 2050](#) document. The collaborative vision articulated by *Vision 2050* remains clear – Australian wine: enjoyed and respected globally – and this is the vision that continues to guide our strategy.

In 2024, the [OGWSP](#) identified a series of priority actions to address current challenges for the sector, some of which could potentially derail progress towards achieving *Vision 2050*.

From taking action to address the current imbalance between supply and demand, to focused investments in market diversification and intensification, this Strategic Plan outlines how Wine Australia intends to deliver on the OGWSP priorities falling within its remit. Wine Australia's responsibility also extends to sustainability – through ESG and economic viability but also through the long-term skills and talent pipeline required to ensure the sector is attracting, retaining and developing the knowledge and expertise to get the best out of those in the sector, and those who will enter the sector in future.



Wine Australia's role is defined by statutory requirements set out in the *Wine Australia Act* and we act on the priorities and goals of our levy payers and government.

Wine Australia's strategy is set by its Board and is approved by the Commonwealth Government's Minister for Agriculture, Fisheries and Forestry.

To fulfill its responsibilities, among other things, Wine Australia must:

- comply with statutory obligations, including the *Wine Australia Act* and the *Public Governance, Performance and Accountability Act 2013*
- regularly consult with levy payers to inform its investment priorities
- invest in line with the National Science and Research Priorities and National Agricultural Innovation Priorities outlined in the National Agricultural Innovation Policy Statement, as required by the Statutory Funding Agreement entered into under the *Primary Industries Levies and Charges Disbursement Act 2024*, and
- uphold transparency and accountability to levy payers and the Australian Government.

While executing its role, Wine Australia must also remain impartial and apolitical, refraining from:

- advocating that the Commonwealth or a State or Territory Government adopt a particular policy, and/or
- representing the views of industry as being those of Wine Australia or the Australian Government.

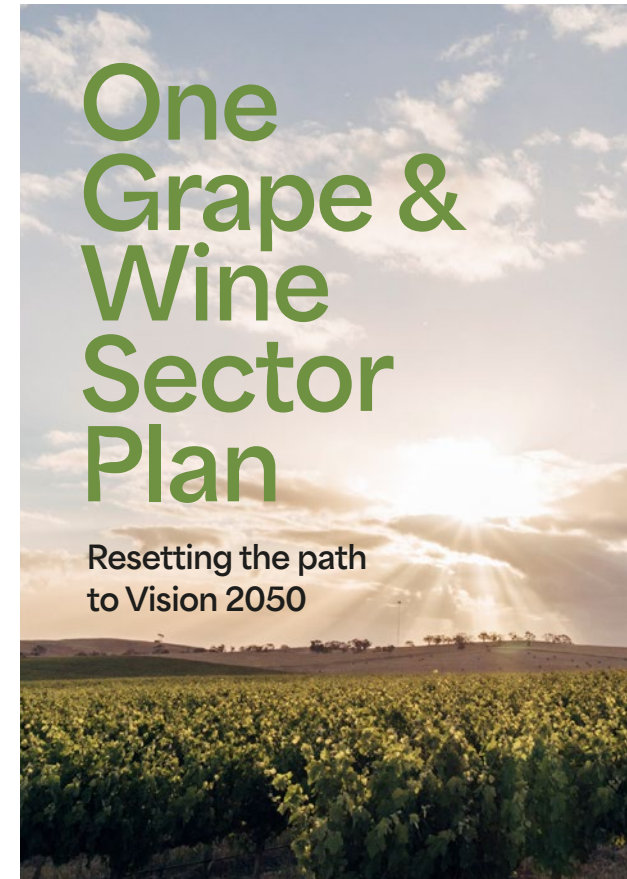
The One Grape & Wine Sector Plan

Since 2020, the sector has been subjected to ongoing challenges. In 2023–24, Australian Grape & Wine and Wine Australia joined with state and regional associations in an Australia-wide consultation along the value chain to develop an industry response to the combined effects of these. The [One Grape & Wine Sector Plan](#) (OGWSP) is a unifying strategy which articulates the sector's priorities and outlines clear actions to be taken by all parts of the sector to achieve individual, business and sector success.

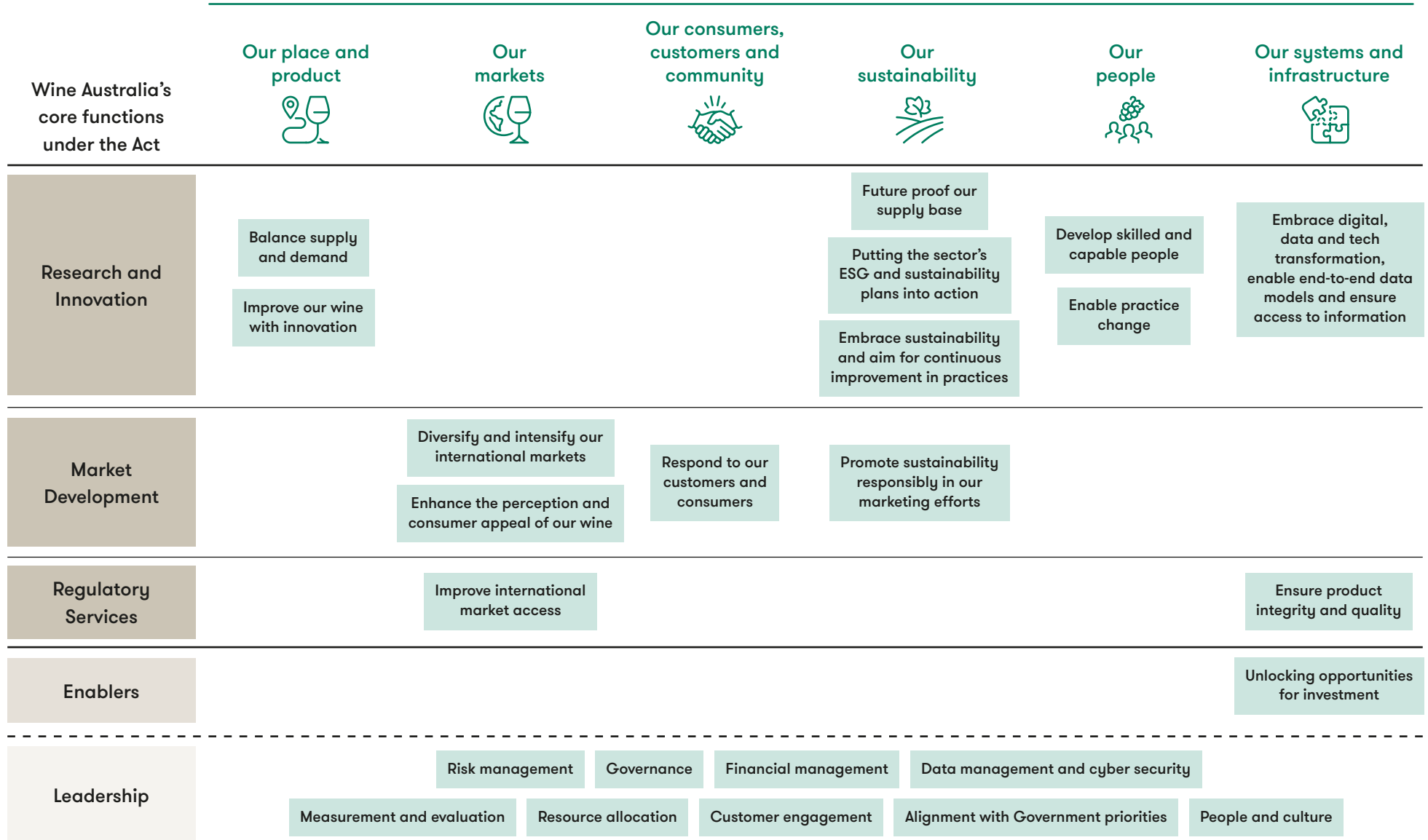
The sector's priorities are captured in six themes:

- Our place and product
- Our markets
- Our consumers, customers and community
- Our sustainability
- Our people, and
- Our systems and infrastructure.

Wine Australia's 2025–2030 Strategic Plan has been framed around these OGWSP themes in relation to Wine Australia's functions as identified in the [Wine Australia Act](#).



The objectives of the One Grape and Wine Sector Plan allocated to Wine Australia



Research and Innovation

Wine Australia empowers sector success by enhancing global competitiveness, helping grape and wine businesses meet the challenges of tomorrow, today.

The OGWSP themes addressed by Wine Australia's Research and Innovation function are:



Our place and product

Our sector needs to protect its vineyards, increase resilience, and drive innovation by leveraging market and consumer insights to maintain global standards while preserving regional uniqueness.



Our sustainability

Sustainability is central to our sector's current and long-term resilience, profitability and success. Through an environmentally considerate and socially responsible sector, global market access is maximised, business costs are reduced and trade and production risks mitigated. Our sector aspires to be recognised as a global leader, embedding progressive environmental, social, and governance (ESG) practices to enhance the resilience, productivity, profitability and longevity of the sector.



Our people

Our sector is a respectful and inclusive community that fosters diverse leadership and rewarding careers and provides the knowledge and skills to build resilient businesses.



Our systems and infrastructure

Our sector needs to integrate state-of-the-art technologies, digital methodologies and data-driven approaches to improve efficiency, quality, profitability, competitiveness and connectivity.



OGWSP OBJECTIVE

Balance supply and demand

Impact³

In 2030, the availability of trusted data, information and tools will deliver increased business resilience through better decision-making.

Measures of success⁴

- Resources developed and maintained by Wine Australia meet the sector's requirements and their use increases year on year.

Background

The oversupply of red wine and red winegrapes is the single most critical challenge identified in consultations during the development of the OGWSP. It is evident that the sector requires urgent support in this area.

Rebalancing supply and demand in the sector is not something that can be fixed by a single market, policy approach or innovation. Nor can it be resolved by any single organisation. It requires collaborative efforts from all parties and will require focused efforts and actions in the short term while working towards long-term solutions. There is a strong desire to align future production with market demand.

Wine Australia will provide data, analysis and tools to support the balancing of supply and demand. We will provide annual updates and analysis on the global and Australian supply and demand situation and communicate the outcomes via numerous avenues, including flagship reports, market bulletins, webinars, media articles and regional and national presentations.

On the supply side, Wine Australia will continue to collect and report data through the National Vintage Survey and Dashboard and the Production, Sales and Inventory (PSI) Survey, and will aim to provide planting and removals information by region and variety through the establishment of a National Vineyard Register.

On the demand side, we will continue to provide regular reporting on export market performances through the Export Report and Dashboard and on the domestic market through the PSI Survey and other third-party data via the Market Explorer Dashboard. These data sets will also help wineries identify market opportunities by price segment.

We will continue to maintain the Grape Price Indicators Dashboard with the latest data to ensure grapegrowers are kept up-to-date with current supply and demand trends. We will continue to work with Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) to ensure they have the most relevant data and insights to inform their wine and grape forecasts.

Outcomes from Wine Australia investment

By 2026

- A domestic sales dashboard is available to provide greater transparency on the sector's biggest market.

By 2028

- A national vineyard register is available to provide insights into winegrape supply.

By 2030

- Businesses have an extensive, broad and diverse set of new and improved data, information, and tools from Wine Australia and partners.

Key priorities for Wine Australia investment

- Develop the framework for a national vineyard register to provide insight into the national vineyard area and winegrape supply, capturing key data to support business planning.
- Lead initiatives to improve transparency and data availability to support efforts to balance supply and demand – from vineyards to sales.
- Provide data, information, and tools to help the sector plan pathways to sustainable supply and demand balance, and help businesses make informed decisions for a resilient future.

³ This describes the impact to the sector of Wine Australia's contribution to each OGWSP objective.

⁴ Overarching measures of success for this Strategic Plan are described on page 35. More specific metrics for individual activities and investments will be included in annual operating plans. The measure of success in each section relates to Wine Australia's activities to contribute to each section's OGWSP objective.



OGWSP OBJECTIVE

Improve our wine with innovation

Impact

In 2030, co-designed research and innovation across the value chain will result in more practices and products successfully meeting evolving market and consumer demands.

Measures of success

- Wines from new and emerging product categories in which we have invested are available to consumers.
- At least three new vineyard or winery innovations from Wine Australia investments being used within the supply chain.
- All projects co-designed with relevant customers and at least 90 per cent of projects with co-investment from appropriate partners.
- The number of grape and wine businesses who have collaborated and co-invested with researchers funded by us increases each year.

Background

The wine sector offers a wide range of products to cater to various tastes. However, the sector needs to be adaptable and align production and quality with market demand as it faces changing consumer preferences and competition from other alcohol and alcohol-adjacent products.

The OGWSP consultation identified the need for the sector to:

- aim to better integrate consumer preferences with vineyard techniques, winemaking techniques and innovations to produce wines that resonate with consumers
- apply new technologies across the value chain to improve competitiveness, enhance product quality and improve production efficiency and sustainability, and
- seize opportunities to enhance the quality of Australian wines to strengthen competitiveness in the market and attract customers from other alcohol beverage categories.

Wine Australia will invest in co-designed research and innovation to align products with consumer and market demand.

Outcomes from Wine Australia investment

By 2026

- Technologies and innovations supported by Wine Australia's research or adoption projects are used by producers for vineyard monitoring and to support decision making.

By 2028

- Increased application of novel or new-to-them production approaches helps businesses to diversify into new product categories, supported by robust market size and opportunity data.

By 2030

- Businesses are empowered to take action to produce grapes and wines in new ways using knowledge and tools from Wine Australia investment and have demonstrated engagement with collaborative projects.

Key priorities for Wine Australia investment

- Invest in the development of innovative new products to compete in product categories with increasing consumer demand, such as low and "mid-strength" alcohol wines.
- Invest in the development of new vineyard practices and winemaking techniques so that the sector can innovate and produce wines that resonate with consumers.
- Explore the use of artificial intelligence and other new technologies along the value chain to improve quality and efficiency.
- Provide information, insights and innovation that support the sector to align products, quality and value with consumer and market demand.
- Support intensification of existing markets and diversification to emerging markets for Australian wine, based on providing greater understanding of consumer and market trends.
- Support regional associations to design and enhance local solutions for key challenges in viticulture, winemaking and business.



OGWSP OBJECTIVE

Future proof our supply base

Impact:

In 2030, grape and wine producers will have greater flexibility in responding to the effects of climate change, sustainably managing pests and diseases and meeting the challenges of biosecurity threats.

Measures of success

- Grapegrowers are accessing information from our investments for managing and maintaining vineyards for dynamic, planned yields aligned to demand.
- Technologies and knowledge from our investments are being applied to manage climate-related variability in vineyard production.
- Solutions to pest and disease issues with the greatest economic cost to the sector are being invested in, ideally in collaborative models.
- Existing climate-resilient grapevine varieties, clones and rootstocks are shown to be suited to sustainable vineyard practices and new ones are being developed.

Background

Australia's climate will continue to change and present challenges in managing vineyards. It is essential to build climate resilience through practices that protect Australia's viticultural assets and work to preserve and enhance environments. This responsibility falls on everyone.

Sustainable vineyard planning, exploring climate-suitable varieties, clones and rootstocks, maintaining healthy vines, managing pests and diseases, and ensuring sound biosecurity practices are vital tasks that require careful attention. We will explore strategies to increase demand, improve flexibility in responding to climate change, and ensure the sustainability of Australian vineyards for the future.

Outcomes from Wine Australia investment

By 2026

- Grapegrowers have knowledge about short-term adaptation strategies to manage and maintain vineyards in low-demand periods.

By 2028

- The sector has access to new tools and technologies to better predict, manage and mitigate the increasing risk posed by bushfires and smoke taint.

By 2030

- Australia's grapegrowers and winemakers have access to a wide range of grapevine varieties, clones and rootstocks that are climate-resilient and suited to sustainable vineyard practices.
- the sector has access to a toolkit of strategies for seasonal management of climate extremes and long-term adaptation to climate change.
- the sector is well-prepared to manage endemic and exotic pests and diseases through the establishment of strong cross-sectoral and government relationships, and by securing co-investment in critical biosecurity research and innovation initiatives.

Key priorities for Wine Australia investment

- Support research into the development and evaluation of new planting materials, including varieties, clones and rootstocks.
- Continue to invest in the Wine Australia National Germplasm Collection Program to protect and preserve Australia's unique grapevine genetic resources, facilitate the supply of clean, true-to-type planting material to the sector and support propagation supply chain activities that build and strengthen sector resilience.
- Share strategic climate adaptation information from the Bureau of Meteorology and other key Australian research providers.
- Develop a decision support tool for grapegrowers and winemakers which encompasses all existing knowledge to predict, manage and mitigate the increasing risk of bushfires and smoke taint.
- Invest in the development of improved and/or innovative vineyard practices, and techniques to manage vineyard pests and diseases more sustainably.
- Maintain and strengthen cross-sectoral and government partnerships to leverage funding and support biosecurity research, innovation, development, and extension efforts.



Putting the sector's ESG and sustainability plans into action

Impact

In 2030, the Australian wine sector is recognised as a global leader in sustainability and environmental, social and governance (ESG) practices.

Measures of success

- New and emerging ESG-related business and market access risks and opportunities are identified and communicated to grape and wine producers through the development of resources, demonstration of emerging technology and extension and adoption activities.
- Australian grape and wine producers are empowered to plan, implement, record and promote sustainability-related actions, progress and success through a tailored sustainability communications program.
- An extension and adoption program is delivered to customers to enable the implementation of emissions reduction activities identified through Wine Australia's [Emissions Reduction Roadmap](#) and through novel approaches.
- Projects with other industries are implemented to increase opportunities for the reuse and recycling of vineyard and winery waste materials.
- Wine Australia continues to invest in programs and projects that align environmental and social benefits to business profitability and identify opportunities for promoting carbon insetting, including biodiversity and conservation co-benefits.
- Resources, developed and maintained by Wine Australia, to enable grapegrowers to switch to sustainable practices and support the sector in meeting ESG requirements and their use increases year on year.

Background

The Australian grape and wine sector is proactively committed to sustainability and ESG principles and recognises the importance of ongoing action, reflected in Wine Australia's [ESG Investment Plan](#) and [Emissions Reduction Roadmap](#). Economic viability and business objectives are central to the sector's sustainability commitments.

OGWSP consultation identified the need for the sector:

- to strive to enhance sustainability by applying responsible practices and developing climate-adaptive solutions for both viticulture and winemaking
- to take steps to reduce the sector's environmental impact, including the sector's carbon footprint, in line with Wine Australia's Emissions Reduction Roadmap for the sector and with national emissions reduction targets, and
- in the face of increasing scrutiny of Sustainability and ESG credentials:
 - to commit to demonstrating the sector's sustainability credentials and continuous improvement through programs including Sustainable Winegrowing Australia, and
 - to support establishment of a robust Sustainable Winegrowing Australia that meets the future needs of the sector and is flexible to support grape and wine businesses of all sizes.

Wine Australia will provide a research and adoption program focused on sustainable outcomes and climate adaptive and mitigative practices and products. Wine Australia will assist grape and wine producers to understand and action ESG-related activities that are aligned with business profitability and longevity and ensure global market access.

Outcomes from Wine Australia investment

By 2026

- Australian grape and wine producers are provided with resources and access to training opportunities to capture ESG-related data and communicate business ESG outputs.
- The majority of wine and grape businesses have established their emissions baseline and are aware of ways to reduce it.

By 2028

- Lower emissions alternatives to landfill are available for disposal of most vineyard waste.
- Progress is made against the emissions reduction opportunities identified in the Emissions Reduction Roadmap, and toward agricultural and national targets.
- Grape and wine businesses have adopted one or more initiative(s) to reduce their baseline emissions.

By 2030

- Sector greenhouse gas emissions (GHG) emissions have reduced by 42 per cent of the 2020–21 baseline, consistent with Wine Australia's [Emissions Reduction Roadmap](#).
- Carbon literacy and understanding of the collection and use of data and carbon calculators by the sector is increased.
- The opportunities and benefits of low emissions practices are well understood throughout the sector.

Key priorities for Wine Australia investment

- Support transition to practices that lower the sector's carbon emissions by 42 per cent by 2030, consistent with Wine Australia's [Emissions Reduction Roadmap](#).
- Explore new practices and solutions to continue reducing emissions.
- Share progress, challenges, and achievements related to emissions reduction efforts with the sector.
- Investigate sustainable usage of, or low-emissions alternatives to, vineyard and winery inputs.
- Increase adoption of best practice irrigation management.
- Develop solutions for waste circularity and sustainable packaging.
- Develop strategies and practices to improve soil health, biodiversity and landscape management that improve measurable ecological outcomes.
- Provide practical tools and campaigns to support effective implementation of sustainable practices in diverse business scenarios.
- Support regional associations to design solutions for local challenges in viticulture, winemaking and business.





Embrace sustainability and aim for continuous improvement in practices

Impact

In 2030, Australian grape and wine producers will be empowered to take action to respond to global and regional drivers of ESG and to meet customer requirements. Data provision and auditing to capture and communicate sustainability credentials, progress and achievements will have been enhanced.

Measures of success

- Resources, tools and extension activities are available to facilitate the uptake of accurate and transparent ESG data capture, reporting and communication to ensure access to global wine markets.
- Grape and wine producers can prioritise and implement ESG actions, based on the needs and priorities of their customers, staff, suppliers and community.
- Wine Australia has assisted Australian grape and wine producers to determine the business advantages of the adoption of ESG policies, practices and behaviours.
- A sector-specific tool to measure Scope 1, 2 and 3 emissions is delivered and used by grape and wine businesses.
- The carbon footprint of the grape and wine sector is reduced.
- Australian grape and wine producers understand and adopt energy-efficient practices, sustainable production outcomes, responsible labour practices and modern slavery due diligence requirements.

Background

As the world increasingly embraces sustainability, organisations are improving practices to meet changing customer and consumer demands. Businesses are already embracing eco-friendly practices such as organic farming, water conservation and renewable energy, while also focusing on social responsibility through fair labour practices and community engagement.

Wine Australia will assist grapegrowers and winemakers to understand and respond to evolving market access requirements, build business resilience and reduce costs through the introduction of opportunities to increase data capture and storage.

Greater research and uptake of existing technology, behaviours, data capture and information disclosure are required to meet the changing needs of customers. By providing the sector with the tools and knowledge to make practice changes, businesses can meet and exceed market demands, reduce their costs, harness opportunities and mitigate risks. In addition, a proactive stance on sustainability enhances the industry's reputation and opens opportunities for partnerships and investment.

Wine Australia will provide practical tools, systems, and processes to help the sector achieve its sustainability objectives. We will enhance data provision and seek to improve auditing by supporting programs that assist grapegrowers and winemakers to capture, report and communicate data, while minimising the administrative burden of doing so.

Outcomes from Wine Australia investment

By 2026

- Australian grape and wine producers will understand the priority ESG needs of their customers and have the skills and knowledge to collect and provide basic ESG-related information, in order to maximise opportunities for the sale and distribution of Australian wine.
- Guided by the ESG Investment Plan, the sector will have clear and established ESG focus areas that address customer needs and promote the sustainability credentials of Australian-produced grape and wine.
- Australian grape and wine producers will be proactively managing ESG-related risks, with a focus on identifying exposure to and reducing risks across wine supply chains.

By 2028

- The sector will adopt activities that further advance its reputation as a producer of socially and environmentally responsible grape and wine.
- Australian grapegrowers will have the tools and knowledge to successfully calculate Scope 1, 2 and select Scope 3 emissions through sector-specific tools and extension and adoption programs developed by Wine Australia.

By 2030

- Australian grape and wine producers adopt practices, technologies and behaviour change that lead to productivity and efficiency gains and reduce the impact of grape and wine production on the environment.

Key priorities for Wine Australia investment

- Use market and consumer insights and research to promote the adoption of sustainability initiatives.
- Encourage the use of science-based ESG metrics to enable Australian wine businesses to consistently measure, validate and report their sustainability credentials in accordance with globally recognised standards.
- Support improvements to Sustainable Winegrowing Australia auditing procedures to ensure compliance with ESG standards.
- Conduct research on consumer insights, preferences, market trends, and technological innovations to support sustainable practices.





OGWSP OBJECTIVE

Develop skilled and capable people

Impact

In 2030, well-established networks of people at all levels across the sector have the skills and desire to lead, inspire and navigate change. We are attracting, supporting and retaining talent and benefitting from a broader range of perspectives and expertise.

Measures of success:

- More than 90 per cent of participants in Wine Australia's people development programs have gained new knowledge and skills to improve their professional leadership capabilities.
- More than 80 per cent of participants from our people development programs have ongoing engagement and involvement in wider sector activities.
- Metrics across Wine Australia's [Careers in Viticulture and Wine](#) site demonstrate evolving engagement.
- The ability to identify and measure diversity, equity and inclusion (DEI) outcomes across the sector is improving.

Background:

A dynamic and forward-thinking wine sector is built on its ability to attract and retain talent, curating a new generation workforce with a range of skills that are needed for both the unique requirements of viticulture and wine, and also the use of emerging technologies and adaption to future needs. Our approach is collaborative and adaptable, empowering people in their pursuit of innovative, excellent and unique contributions towards a vibrant, sustainable future for the sector. Wine Australia's goal is to support people in the sector as they learn and grow, providing access to upskilling and, importantly, mentoring to build on the solid know-how the sector's people already have for future success.

Wine Australia will continue to update and promote engaging career pathways and resources and collaborate with regional wine associations in their efforts to improve industry-led attraction and retention priorities. We will work with schools and tertiary providers to enhance connections with the industry and provide opportunities for students.

We will maintain a commitment to ensuring the grape and wine sector is represented in various national education and workforce food and fibre

strategies and programs, strengthening industry ties to enhance collective efforts in workforce development.

Outcomes from Wine Australia investment:

By 2026

- Cross-sectoral projects addressing workforce and labour issues across agriculture have identified priority initiatives and been initiated.

By 2028

- The sector's understanding of workforce challenges is enhanced, DEI efforts across the sector are understood, and a toolkit for the sector to focus their DEI efforts is available
- Youth engagement across the sector is supported and we are seeing greater involvement of young people in decision-making processes.

By 2030

- The future workforce needs of the industry continue to be bolstered by a talented and diverse cohort of individuals making a difference across the regions and in a wide range of wine businesses.

Key priorities for Wine Australia investment:

- Provide career pathways information and promote the grape and wine sector as a career of choice among school and tertiary students.
- Work with the school, vocational training and higher education sectors, as well as government-funded and other priority initiatives addressing workforce and labour issues across agriculture.
- Invest in activities to attract and retain skilled and semi-skilled people in all areas of the wine sector, ensuring an experienced and capable workforce.
- Deliver regional and national mentor and leadership programs, such as Wine Australia's [Future Leaders](#) and [Next Crop](#) programs, to ensure equal opportunities for regional leadership development pathways and career advancement.
- Maintain a commitment to research and activities aimed at achieving DEI across the sector and ensure diversity and inclusivity in mentoring and leadership programs.



OGWSP OBJECTIVE

Enable practice change

Impact

In 2030, grapegrowers and winemakers across all business models and geographic regions will have access to the support and information they need to implement practice change in their business. They will have a greater appreciation of the personal and business benefits of practice change, the facts they need to inform better decision-making, and greater confidence and ‘know how’ to act.

Measures of success

- A revised Wine Australia Extension & Adoption Plan is available and articulates:
 - how we will deliver a nationally coordinated approach to maximise efficiencies and impact
 - the capacity-building of ‘trusted advisors’ who grapegrowers and wine makers rely on for the latest advice and information
 - the use of a communications approach designed specifically to successfully promote outputs to different target groups, and
 - the procurement of external expertise to build national and regional capacity for sustainable E&A programs.
- A documented approach is used to measuring the impact of the E&A plan as it is progressively enacted, with supporting continuous improvement processes.
- The level of industry awareness, understanding and adoption of Wine Australia’s outputs has been benchmarked and is improving over time.

Background

Ensuring everyone has access to the information, skills training and insights they need to make informed decisions will strengthen the competitiveness and resilience of individuals and the sector. We will encourage best practice in vineyards, wineries and along the value chain.

Wine Australia will evolve extension and adoption by understanding grapegrowers and winemakers better and responding to individual needs,

motivations and decision-making processes. We will play a coordination role nationally to align efforts, foster regionally-owned solutions and maximise the potential for pooling resources and leveraging industry levies more effectively.

Outcomes from Wine Australia investment

By 2026

- An enhanced understanding of who grapegrowers and winemakers turn to for information and advice and what support is needed to drive practice change in the grapegrowers and winemakers they influence is available and being used to improve their impact and outcomes for those they influence.

By 2028

- Data has been collected that articulates the primary motivators and barriers to practice change across the key grapegrower and winemaker segments and is used to inform and enhance our extension and promotion activities, improve their impact and outcomes for the sector.

By 2030

- Enhanced practice change occurs for players along the adoption decision-making chain because greater value will be delivered through a nationally-coordinated approach to activities and resources, designed to facilitate practice change.

Key priorities for Wine Australia investment

- Continually improve extension and adoption efforts through collaboration and consultation with grapegrowers and winemakers.
- Facilitate practice change and the adoption of existing knowledge to improve grape growing, winemaking, exporting and running a wine business.
- Identify and support activities to increase innovation and profitability in wine businesses.



OGWSP OBJECTIVE

Embrace digital, data and tech transformation, enable end-to-end data models and ensure access to information

Impact:

In 2030, digital transformation initiatives and collaborations will have led to widespread and novel sector use of technology and data for connecting the value chain in mutually beneficial ways.

Measures of success:

- The provision of training, materials and activities assists in building skills and capability to engage with digital technologies and data throughout the sector.
- Wine Australia is actively collaborating with others within the wine sector and across other sectors to develop and/or share common digital resources.
- Demonstrable application within levy payer businesses of beneficial insights from digital and data opportunities to inform decisions that improve productivity and profitability.

Background:

Digital systems, artificial intelligence, data, and technology are revolutionising the way the sector does business, spanning from the vineyard to the point of sale, elevating product standards with emerging technologies requiring increased digital literacy and skills to harness their benefits. These include data analytics and digital marketing tools to streamline processes, to support data-driven decision-making, to comprehend consumer behaviour, to optimise production processes and to forecast market trends. OGWSP consultation identified the need for the sector to improve the use of data to inform business decisions and simplify reporting requirements.

Improving and streamlining information dissemination throughout the sector will ensure that the wine community knows where to find relevant data, resources and information promptly to make informed business decisions to drive resilience, profitability and sustainability.

Wine Australia will support digital transformation by connecting all supply chain participants and building trust, collaboration and sharing of data across the supply chain to ensure the value of the sector's digital assets is optimised. This will provide confidence to the sector's future customers and consumers that Australian wine delivers assured quality and has been produced and transported using sustainable practices.

Wine Australia will facilitate relationships across the supply chain, acting as the intermediary to bring together participants to deliver fit-for-purpose products into key markets. We will prioritise strategic partnerships with those willing and able to share data and insights and help communicate the benefits of a connected supply chain.

Outcomes from Wine Australia investment

By 2026

- The sector's requirements for managing and engaging with digital solutions and data opportunities will be clarified and used to design and implement use case examples.

By 2028

- The sector will have use cases to demonstrate the value of new digital technologies; these will be well-known, and activities and materials to support digital capabilities within the grape and wine sector's workforce will be available and used.

By 2030

- The value chain associated with the sector will have access to data platforms that reduce duplication, support a whole-of-industry data perspective, and reveal new insights and opportunities to inform decisions to improve productivity and profitability.

Key priorities for Wine Australia investment:

- Support the development of world-class digital and data systems and technology that are fit-for-purpose, integrated and efficient.
- Develop partnerships to enhance digital literacy and technical capabilities across the sector.
- Develop and implement a central register for the collection and storage of data related to the identity, location and health status of Australian grapevine propagation assets and to the grapevine varieties, clones and rootstocks available to the sector.
- Collaborate with other agricultural sectors and governments in defining data standards, linking systems along the value chain and streamlining processes to reduce the reporting burden.
- Facilitate sharing of end-to-end supply chain data by supporting development of common data standards, processes and digital infrastructure to build cohesion in the sector's value chain systems.
- Develop activities, including demonstrations, trials and skills development, and build clarity around return on investment to support increased adoption of best practice technologies in vineyards and wineries.
- Provide timely updates and resources on digital transformation initiatives for grapegrowers, winemakers, and businesses, aiming to reduce duplication while maintaining effective communication.



Market Development

Wine Australia empowers sector success by uncovering, developing and promoting market opportunities globally.

Recognising the headwinds facing the global wine industry and the finite resources available to directly effect change, Wine Australia's marketing efforts in the coming five-year planning cycle will be primarily focused on providing relevant insights to enable better market-facing decision making and facilitating opportunities that enable wine businesses to foster and cultivate connections that deliver commercial outcomes.

Wine Australia will continue to work on building sector capability through education and tailored market activations to build awareness, relevance and preference for Australia and Australian wine and we will focus our resources and efforts on markets that offer the greatest opportunity and returns for the industry.

Wine Australia does not sell wine. Our objective remains to work with the sector, guided by our sector-led advisory groups, the Consumer Insights Advisory Group and the Joint Marketing Group, to facilitate outcomes that increase the demand and premium paid for Australian wine.

The OGWSP themes addressed by Wine Australia's Market Development function are:



Our markets

Our sector needs to increase its international distribution footprint and market penetration while defending its position in the domestic market.



Our consumers, customers and community

Our sector is flexible and responsive to the needs of consumers, customers and communities, ensuring social licence is maintained in a rapidly evolving market landscape.



Our sustainability

Sustainability is central to our sector's current and long-term resilience and profitability. Programs that support sustainability initiatives need to be flexible and tailored to support grape and wine businesses of all sizes.



OGWSP OBJECTIVE

Diversify and intensify our international markets

Impact

By 2030, Australian wine's share of imported wine sales in markets where Australia is currently under-represented will have grown and market share where Australia is already well-established will be defended.

Measures of success

- An increased share in targeted emerging markets and market segments in established markets where Australian wine is under-represented.
- Maintaining the Australian wine sector's share in targeted emerging markets and market segments in established markets where Australia is already well positioned.

Background

Approximately 60 per cent of Australian wine is exported. Exports are key to the profitability and sustained growth of the sector, yet there is a large cohort of people who have yet to discover Australian wine. Research from Wine Intelligence on seven key wine export markets showed there are almost 200 million regular wine drinkers across those markets, but only 42 million drink Australian wine⁵. The opportunity is significant and once extrapolated across more markets, grows further.

Over the next five years, the sector aims to reach many of these wine consumers who do not currently consume Australian wine. Wine Australia will strive to build the relevance of Australian wine globally, using education to build foundations in emerging markets and preference in those more established.

Wine Australia aims to help grow and defend Australian wine's market share by providing market development activities that our customers are increasingly satisfied with and that their business/brand will increasingly benefit from by participating in the activity⁶.

A suite of tailored marketing activations in key markets, geared to building stronger affinity for and connection to Australian wine is paramount. These connections will focus on delivering commercial outcomes with annual plans crafted to unlock emerging opportunities, with input from the Joint Marketing Group.

Market diversification remains a strategic imperative. We will focus on diversifying and intensifying the Australian wine sector's export markets, delivering meaningful and actionable insights to wineries that inform product development initiatives and offering market activations to meet trade and consumer demands.

We remain focused on building the collective Australian wine brand that is based on the rich regional and individual brand stories that make Australia unique. We will leverage this refreshed national Australian wine brand and tailor it to market maturity, size of opportunity and our collective ability to address specific market needs through existing offers or innovation, catering to premium and commercial segments. Continued collaboration with state and regional associations to leverage resources, tell our unique regional stories and maximise outcomes remains a key pillar in our ability to deliver meaningful levels of activity over the plan period.

We will build year on year as resources allow and opportunities present, delivering innovative marketing strategies that leverage insights to connect with trade and consumers by aligning with trends, reducing trade and market access barriers and maintaining a continued dedication to quality.

⁵ USA, Canada, UK, Japan, South Korea, India and Vietnam.

⁶ Measurement: through aggregation of post-event surveys



Outcomes from Wine Australia investment

Each year⁷:

- In emerging markets, the Australian wine sector's market share of imported wine
 - will grow in Vietnam and Philippines, and
 - will be maintained in Indonesia and Thailand.
- In established markets, the Australian wine sector's market share of
 - premium imported wine will grow in the United States, Canada and UK/Ireland
 - commercial imported wine will be maintained in the United States, Canada and UK/Ireland, and
 - all imported wine will grow in Denmark, Nordic monopolies (Sweden, Norway, Finland), Japan and China.
- In Australia, the Australian wine sector's market share will be maintained.

Key priorities for Wine Australia investment

- Use tailored, targeted initiatives and strategic investments to support an increase in Australia's market presence in key emerging and existing export markets.
- Create in-person and virtual connections to build awareness and preference for Australian wine.
- Collaborate with the Australian Government, state governments and state and regional associations to leverage resources, tell regional stories and maximise outcomes.
- Maintain direct in-market representation in North America, the United Kingdom, Japan and China and partner with Austrade posts in other locations to deliver marketing activations, particularly in the Asia Pacific region.
- Engage retailers, buyers, importers and other international trade to build the presence of Australian wine in targeted markets.

⁷ Specific metrics for each of the selected markets will be included in annual operational plans.



OGWSP OBJECTIVE

Enhance the perception and consumer appeal of our wine

Impact

By 2030, perception of Australian wine will have increased over 2025 baseline levels in all target markets.

Measures of success

- The quality and value perception rating of Australian wine in the targeted markets is higher based on an annual survey of consumers (or trade).
- Education continues to play a significant role in building understanding and preference for Australian wine. Post activity/event surveys will measure improvements in perception changes and program effectiveness.

Background

Rapidly changing consumer preferences provide opportunities to respond through product innovation and tailored activities. We will work collaboratively to enhance the perception of Australian wines across all markets.

A key pillar in perception building will be to leverage Wine Australia's existing Australian Wine Discovered (AWD) educational assets and build stronger connections with targeted subject matter experts and influencers. These partners can assist in delivering and amplifying the Australian wine brand positioning, through engaging education-based activations. Our goal remains to build global understanding of Australia's diversity – be that the 65 wine regions, the people who call them home or the quality wines that are produced from them.

In marketing activities, this will be through presenting the cohesive Australian Wine brand position of “Adventurous. By Nature.” that unites the sector in promoting Australian wine, aligns key messaging and leverages regional initiatives to showcase the unique characteristics of each region and brand, demonstrating to trade and consumers that Australian wine is the product of applying modern thinking to Australia's ancient lands.

Outcomes from Wine Australia investment

By 2030, there will be an increase in the quality perception rating of Australian wine from the established 2025 baseline in the following markets:

- Australia
- USA
- Canada
- UK
- Nordics
- Japan
- China, and
- Southeast Asia: Thailand, Vietnam, Indonesia and Philippines.

Key priorities for Wine Australia investment

- In-market activity such as roadshows that provides platforms to engage, educate and excite trade and consumers, build understanding of Australian wine and enables commercial outcomes with local trade partners.
- Wine Australia's Education Development Managers will continue to engage with leading educators and run training programs and workshops directly. We will also look to supplement their activity with a network of recognised in-market educators who can utilise our best practice AWD education modules to build awareness of and greater affinity for Australian wine.
- Generate relevant and usable insights for the sector to enable better decision making on product development, market attractiveness, consumer wine drinking motivations and behaviours.
- Ensure that our annual international marketing programs reflect the varied needs of the sector and the in-market opportunities at hand through leveraging the expertise and insights of the Joint Marketing Group.



Respond to our customers and consumers

Impact:

By 2030, the Australian wine sector's customers will have a deeper evidential base from which they can respond to the changing tastes and habits of wine consumers in targeted emerging and established markets.

Measures of success:

- Wine Australia's Market Insights information and services increasingly become an integral part of the decision-making processes of the sector and the individual businesses contained within the sector.

Background:

Understanding the changing tastes and habits of consumers and the evolving demands of customers is critical to the Australian wine sector's success.

A focus on generating relevant and useful insights for the sector will enable better decision-making on market attractiveness, consumer wine drinking motivations and behaviours, and ultimately inform research and innovation investment.

We need to deepen our understanding of younger consumers and their motivations for or barriers to drinking Australian wine in established markets and to also better understand the role of wine in general, and Australian wine specifically, amongst consumers in emerging markets, particularly in the Asian region.

Wine Australia has established a cross-sector Consumer Insights Advisory Group (CIAG) to support these objectives. The role of the CIAG is to facilitate a collaborative approach between Wine Australia and Australian wine companies to:

- establish market research priorities with advice from the Joint Marketing Group
- determine what information is currently available and what can then be shared to address the priorities, and
- consider opportunities for any potential co-investment to fill knowledge gaps.

The desired outcomes include less duplication and greater alignment between market development strategies and research.

Working with all participants across the value chain is crucial to securing access to consumer behavior data and insights – it helps us understand the wine sector's customers, identify opportunities, and facilitate effective product development and promotion. We will use these insights to develop innovative solutions and dynamic game plans that are adaptive to changing market conditions and consumer preferences.

Outcomes from Wine Australia investment:

By 2030, in-depth consumer and market insights on a range of established and emerging markets will be available for the sector to inform business decision making and research and innovation programs.

Key priorities for Wine Australia investment:

- Improve research, innovation and marketing efforts by involving key customers in the co-design process, gaining insights into their needs throughout the product development and marketing cycle.
- Foster collaborative responses to consumer insights across the value chain.
- Co-design research and innovation programs to align developments with consumer insights to attract new customers and expand market presence.
- Provide accurate and up-to-date data, information and insights to the sector to supporting evidence-based decision-making.



Promote sustainability responsibly in our marketing efforts

Impact

By 2030, the Australian wine industry will be recognised as a global leader in sustainability.

Measures of success:

Compared to the 2025 baseline:

- the perception that Australian wine production is sustainable is higher
- the number of wine producers (brands) displaying the Sustainable Winegrowing Australia (SWA) Trustmark is higher
- retailer and monopoly recognition of the SWA program is higher, and
- SWA understanding and recall following trade events is higher.

Background

Consumer research indicates the increased importance of sustainability and ESG practices and values to global customers. OGWSP consultation identified that the sector is committed to upholding the principles of sustainability and ESG, communicating them honestly and transparently to their customers. Sustainability and ESG considerations are integral to maintaining the integrity of the Australian wine sector and will continue to guide our culture of accountability and ethical standards.

Wine Australia will embrace the opportunity that SWA provides to support the development of the Australian wine brand and will integrate SWA messaging into all marketing activities where appropriate.

Wine Australia's trade initiatives will focus on wines displaying the Trustmark as we achieve a critical mass of sustainably-produced and certified wines in target markets around the world.

In terms of market access, we believe that compliance with sustainability programs such as SWA will continue to be of increasing relevance as many global customers pursue efficient and credible ways of evaluating suppliers, as they seek to meet their own ESG targets.

SWA can also provide a point of competitive advantage for Australian wine and the brands that are certified.

Outcomes for the sector

By 2030, Australian wines will be recognised by international trade and consumers as sustainably produced, supported by established sustainability credentials that are recognised by key customers across the entire supply chain.

Key priorities for Wine Australia investment

- Connect with engaged global customers to deliver SWA-themed activity that aligns with their commercial needs and builds awareness of the Australian wine industry's sustainability endeavours with their customers.
- Utilise pilot programs to build greater understanding and uptake across other markets and customers.
- Collaborate with Australian Grape & Wine and the Australian Wine Research Institute on a sector engagement strategy for SWA.
- Collaborate with other agriculture sectors and other grape growing and winemaking countries to support recognition of sustainable practices.
- Maintain the sector's accountability and transparency of practices through truthful marketing and communications.
- Communicate the Australian wine sector's ESG commitments and credentials with a clear and consistent narrative across the value chain.
- Incorporate key SWA messaging into AWD modules and activations.

Regulatory services

Wine Australia empowers sector success by safeguarding product integrity to uphold sector reputation, maintaining market confidence in the high standards expected of Australian wine.

The OGWSP themes addressed by Wine Australia's regulatory function are:



Our markets

Our sector needs to increase its international presence through collaborative efforts, innovative marketing strategies, alignment with consumer trends, reducing trade and market access barriers and a continued dedication to quality.



Our systems and infrastructure

Our sector needs to integrate state-of-the-art technologies, digital methodologies, and data-driven approaches to improve efficiency, quality, profitability, competitiveness, and connectivity within the sector.



OGWSP OBJECTIVE

Improve international market access

Impact

Enhanced access to international markets for Australian wine.

Measures of success

- An appreciable reduction in trade impediments in overseas markets as a result of continued work with the Australian Government and the Australian wine sector, including Australia Grape & Wine and the Australian Wine Research Institute, to enhance market access by identifying and managing technical trade barriers, and by investing in developing, enhancing and providing technical information to inform negotiations.

Background

Regulatory complexities and the dynamic nature of international trade and regulation present ongoing challenges to the profitability and growth of the Australian wine industry.

These are addressed by working together to communicate regulatory information to support the sector's success in global markets and continuing to establish mutually advantageous relationships in export markets and ease technical and non-technical trade barriers.

Outcomes from Wine Australia investment

Enhanced market access for Australian wine in support of the Australian wine industry's export growth and diversification priorities identified in the OGWSP compared to the 2025 baseline.

Key priorities for Wine Australia investment

- Provide information and insights to enable businesses to comply with export market regulations and make informed commercial and strategic decisions pertaining to export growth and diversification opportunities.
- Collaborate with Australian Grape & Wine, the Australian Wine Research Institute and the Australian Government to ease technical and non-tariff barriers to trade and streamline regulatory processes.
- Continuously improve a market access strategy that sufficiently addresses emerging challenges and seeks to promote a fair trading environment for Australian exporters.
- Build and maintain relationships with counterpart regulators to develop a comprehensive understanding of the regulatory requirements in export markets, assist exporters to resolve specific market access issues, and deliver streamlined regulatory processes through this cooperation.
- Support the Australian Government's negotiations for improved market access with accurate, timely and appropriate technical information.



OGWSP OBJECTIVE

Ensure product integrity and quality

Impact

In 2030, the reputation and integrity of Australian wine will be maintained in all markets, including the domestic market.

Measures of success

- Wine Australia's regulatory services meet the Australian Government's Statement of Expectations.
- Sector and consumer confidence in the integrity of Australia wine is maintained.

Background

Well-designed, fit-for-purpose regulatory settings – and compliance with regulation – is crucial for the continued success of the wine sector. Regulatory compliance underpins consumer health and safety, and confidence in the provenance of a product; it can also serve to facilitate trade by demonstrating product credentials to international markets.

Australia's wine export controls are administered through Wine Australia's Licensing and Approval System (WALAS). WALAS allows users to apply online for a licence to export, register products and apply for shipping approval, upload labels, edit shipping details, apply for export documents, manage associated exporters, make payments online, and manage account access.

In discharging our regulatory responsibilities in accordance with the *Wine Australia Act 2013* and *Wine Australia Regulations 2018*, we will meet the Australian Government's Statement of Expectations and have committed to acting in accordance with regulatory best practice in decision-making, operational practices and communications to ensure effectiveness and efficiency.

More specifically, the three principles of regulator best practice, as described in the Australian Government's Regulator Performance Guide, which we are committed to upholding in discharging our regulatory functions, are:

- continuous improvement and building trust – regulators adopt a whole-of-system perspective, continuously improving their performance, capability and culture to build trust and confidence in Australia's regulatory settings

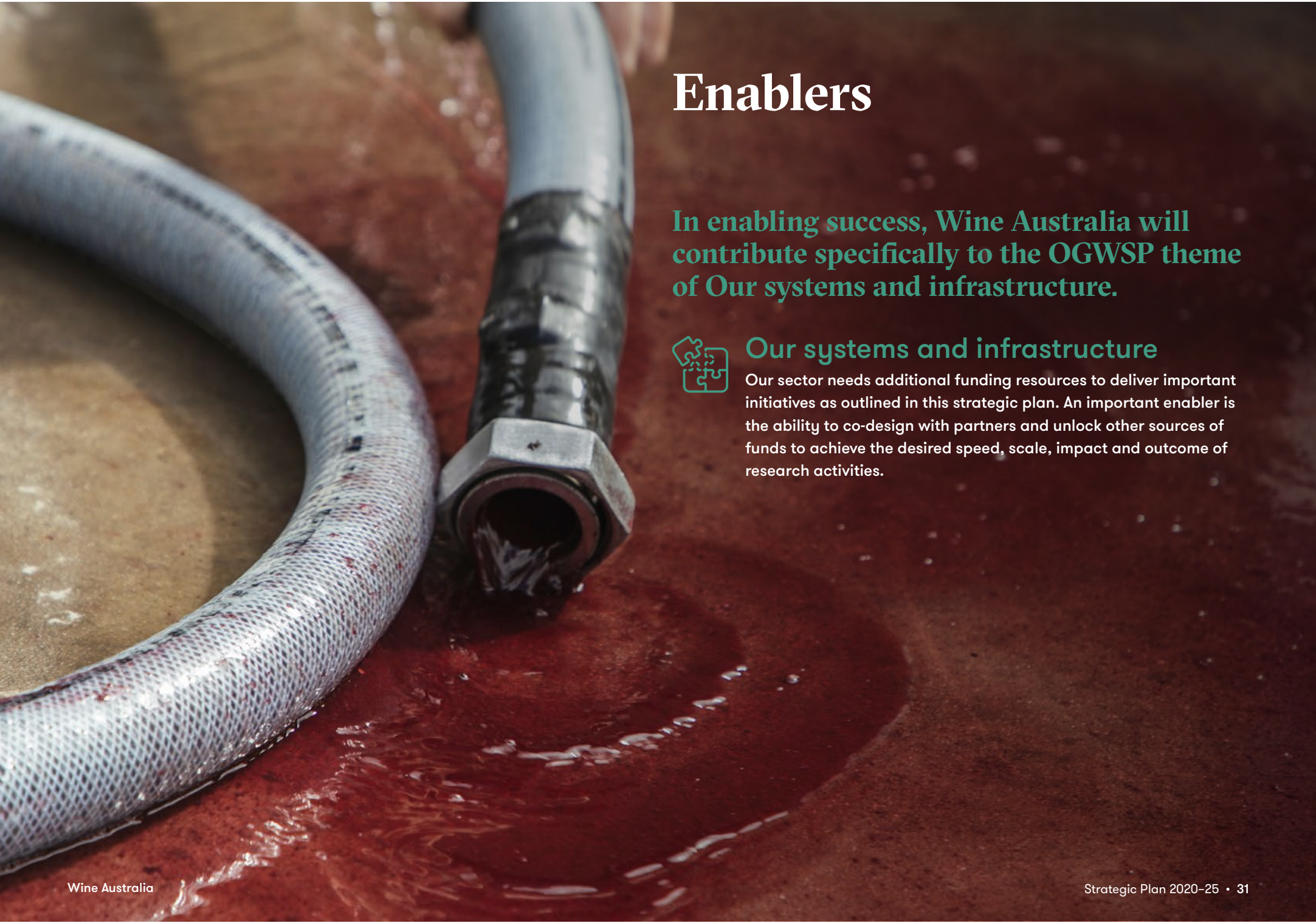
- risk based and data driven – regulators manage risks proportionately and maintain essential safeguards while minimising regulatory burden, and leveraging data and digital technology to support those they regulate to comply and grow, and
- collaboration and engagement – regulators are transparent and responsive communicators, implementing regulations in a modern and collaborative way.

Outcomes from Wine Australia investment

Australia's robust regulatory framework will continue to provide a solid foundation for the success of the Australian wine sector. Fostering and maintaining a 'culture of compliance' within the Australian wine sector will continue to enhance Australian wine's reputation for authenticity and integrity.

Key priorities for Wine Australia investment

- Ensure wide and timely access to information on market regulatory requirements and changes to support production and processes to align with standards and facilitate market access.
- Improve capability and culture to build confidence in Australia's regulatory settings and ensure the appropriate management of risks.
- Maintain essential safeguards and seek to minimise regulatory burden.
- Leverage data and digital technologies to support the sector.
- Continue to enhance WALAS and our export approvals processes in accordance with the priorities identified in the OGWSP and our obligations set out in the Australian Government's Statement of Expectations.
- Continually review our regulatory activities and regulatory fee structure to ensure efficiency and enhance productivity.
- Continue to use risk management principles to underpin our analysis of samples and administration of the Label Integrity Program, and to conduct sufficient analysis and Label Integrity Program inspections to provide confidence that the wine sector demonstrates compliance with Australia's regulatory settings.
- Uphold Wine Australia's high standards of transparent and responsive communication.



Enablers

In enabling success, Wine Australia will contribute specifically to the OGWSP theme of Our systems and infrastructure.



Our systems and infrastructure

Our sector needs additional funding resources to deliver important initiatives as outlined in this strategic plan. An important enabler is the ability to co-design with partners and unlock other sources of funds to achieve the desired speed, scale, impact and outcome of research activities.



OGWSP OBJECTIVE

Unlocking opportunities for investment

Impact

In 2030, additional investment will have put the Australian wine sector on the leading edge of research, innovation and technology and made us more competitive globally.

Measures of success

- Successful establishment, management and operation of an Australian Wine Future Fund, using non-levy funds, resulting in up to four times leverage of Wine Australia's investments in sector priorities⁸.

Background

Given the challenging economic environment, high inflation and the limitations of the current levy system, we need to raise external funding from private investors, government sources and the sector to maintain or grow the total investment available, which will be increasingly important for delivery of sector priorities. Additional sources of funding will allow us to:

- augment research and innovation
- leverage sector levies with cash investments from partners to achieve the desired impact and tangible outcome
- recapitalise existing projects with additional cash infusion from partners
- distribute the risk of investing in research and innovation through investments from the sector, service providers and external investors, and
- attract non-levy-based investments to achieve sector priorities.

The Australian Wine Future Fund aims to leverage Commonwealth matching with Government grants and private sector investment to achieve sector priorities that cannot be met through levy-funded investments.

Outcomes for the sector

By 2026

- The Australian Wine Future Fund is established and co-investment secured, increasing the funding for research and innovation by at least \$4 million per annum.

By 2028

- Research and innovation investments made through the Australian Wine Future Fund, have been successfully commercialised and have been made available for adoption by the sector.

By 2030

- The Australian Wine Future Fund has realised up to \$50 million in additional investment for the sector through co-investments and grants, resulting in a robust portfolio of innovation-led investments that are servicing the Australian wine sector.

Key priorities for Wine Australia investment

- Identify grants, opportunities for co-investment and pursue collaboration with other agriculture sectors and the private sector for additional funding to action the sector's priorities through:
 - tendering for state and federal grants
 - partnering and co-investing in research with state primary industries, research service providers and the sector
 - identifying and pursuing open calls and tenders for innovation, domestically and globally, and
 - catalysing incubation, innovation and commercialisation through venture fund-related investments.

⁸ See page 38 for more information about the Australian Wine Future Fund



Delivering the plan

Leadership of a high performing team in a well-regarded organisation is critical to delivering the plan.

Delivery against the themes of the OGWSP allocated to Wine Australia depends on excellent leadership and corporate oversight, including:

- Governance
- People and culture
- Customer engagement
- Measurement and evaluation
- Risk management
- Data management and cyber security
- Alignment with Government priorities
- Financial management, and
- Resource allocation

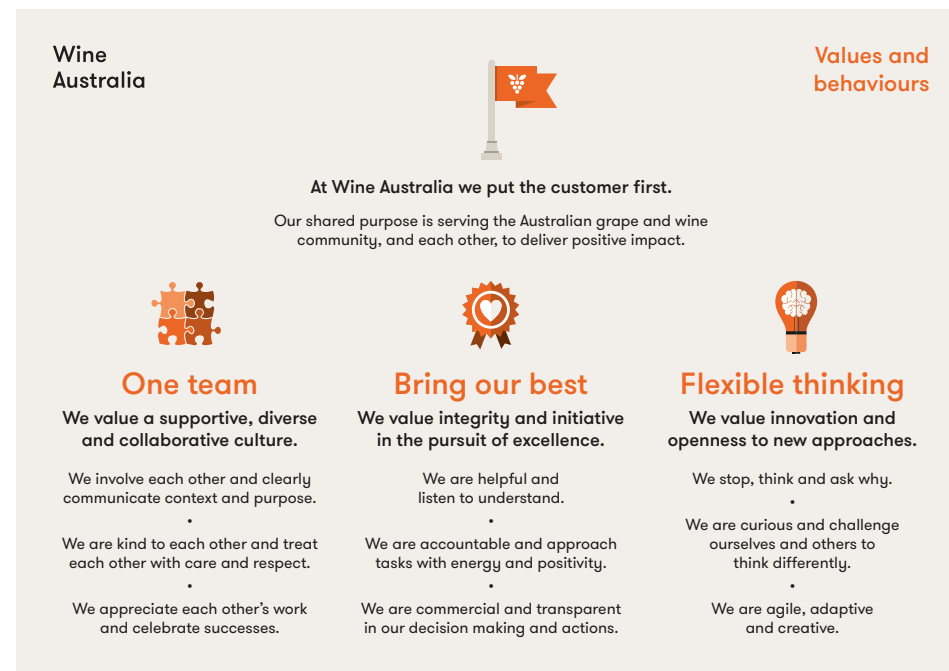


Governance

The accountable authority of Wine Australia, the Wine Australia Board, has ultimate responsibility for the performance of Wine Australia's functions and has obligations under the *Wine Australia Act 2013* and the *Public Governance, Performance and Accountability Act 2013*.

The Board and its directors assume responsibility for, and control over Wine Australia's operations and are responsible for promoting a high standard of accountability, performance, risk management and control.

The specific powers of the Board are created under the *Wine Australia Act* which lists Wine Australia's statutory objects, functions and powers and the constitutional limits within which Wine Australia must perform its functions. Wine Australia is not permitted to conduct activities that fall outside its statutory or constitutional remit as defined by the Act.



People and culture

Our values inform how we work and how we treat each other and the people with whom we work. At the core of this is a customer-centric culture, putting the customer at the heart of everything we do.

Wine Australia invests in the professional development of its people to ensure they have the necessary skills to support the industry. The strategic priorities in this Plan have informed the development of a fit-for-purpose capacity and capability model across all areas of Wine Australia's core functions.

Customer engagement

Through the OGWSP consultation in 2023–24, a diverse range of customers provided extensive feedback and identified key priorities for the sector. Additional feedback from our Independent Performance Review 2023, stakeholder surveys, employee surveys, and engagement with customers has further informed opportunities for improvement. Product, market, customers, sustainability, people and systems must be central to our decision-making to reflect our customers' priorities and to drive the improvements the sector seeks.

Our Customer Engagement Framework has been developed in response to this and builds on our values and behaviours. The Framework ensures that we embed customer commitments and outcomes into everything we do at Wine Australia. This goes beyond a specific service being accessed. It ensures ongoing custodianship of relationships amongst transactions, programs and activations.

These commitments define our promise to customers about how we are working for them and what they can expect when engaging with Wine Australia. Therefore, **Corporate Clarity** – communicating the roles and responsibilities of Wine Australia – is key to managing expectations, **Connection** – engaging with all customers and industry stakeholders and supporting their connections to information, markets and network is an integral role played by Wine Australia – and **Value Proposition** – demonstrating the value delivered by Wine Australia using levy funds and government matching, industry investment and leadership.

Measurement and evaluation

Tailored measurement and evaluation plans will be included for individual programs, activities and projects that are initiated under this Strategic Plan. Detailed metrics for these will be included in Annual Operational Plans.

Wine Australia's overarching metrics for this Strategic Plan over its five-year term are:

- We improve our customer satisfaction metrics from the 2025 baseline.
- More than 70% of exhibitors (exporters/importers) that participate in Wine Australia's marketing activities and events believe that their business/brand will benefit or already has benefited from participating in the activity.
- The share of the sector who use Wine Australia's Market Insights information, services and reports and who believe the information will help them make better business decisions increases from the 2025 baseline.
- There is a demonstrated increase from the 2025 baseline in the number and diversity of producers who understand the potential benefits to their business of adopting new, relevant practice changes or technologies, as well the number adopting these innovations.
- Sentiment regarding value and impact from research and innovation investments increases from the 2025 baseline.
- We achieve the key performance indicators in our Regulator Performance Framework.



Risk management

Wine Australia's risk management framework is aligned with and reflects existing standards and guidance such as *AS/NZS ISO 31000:2018 – Risk Management – Principles and Guidelines* and the *Department of Finance RMG-211 (Implementing the Commonwealth Risk Management Policy)*. These standards highlight key principles for managing risk and are considered when establishing Wine Australia's risk management framework and processes.

As good practice, Wine Australia has established a Risk Management Committee to ensure appropriate oversight of risks.

Wine Australia engages with risk in our operating environment to deliver programs that are innovative, efficient, and dynamic. A positive risk culture promotes an open and proactive approach to managing risks.

Wine Australia may be willing to accept higher levels of risk when the potential benefits outweigh the negative consequences of risks. However, in doing so, we must demonstrate we have made informed, evidence-based and risk-based decisions.

Wine Australia acknowledges that identifying opportunities and capitalising on those opportunities to improve the overall performance of Wine Australia is a key component of meeting its strategic objectives.

Risk management is a responsibility that is shared across the entire organisation. All employees have a responsibility to identify, assess, report and, where appropriate, take corrective action to mitigate risks that are outside the agreed tolerance levels.



Data governance and cyber security

Wine Australia activities and decisions are evidence-based and data-driven and they are supported by sound data governance and management practices. Wine Australia uses data governance processes to oversee the activities related to information, data, and records and to ensure there is accountability for maintaining and securing information, data, and records.

Wine Australia is committed to safeguarding the confidentiality, integrity and availability of our information data, records and systems from cyber threats and vulnerabilities. We use a business-driven, risk-based approach to manage cyber security, we incorporate the key elements of the 'Essential Eight' at an appropriate maturity level and we implement controls in line with our risk appetite. Where there is a threat to our IT infrastructure, values or ethics or if the use of our IT presents a risk to cyber security, we take any necessary action to mitigate the risks or address the behaviours.

Alignment with Government priorities

This plan aligns with Australian Government and industry priorities for science, research and innovation. The alignment with industry priorities is outlined above.

Specific alignment of the Research and Innovation aspects of this Strategic Plan with the Australian Government’s [Science and Research Priorities](#) and [National Agricultural Innovation Priorities](#), as is required by the [Statutory Funding Agreement entered into under the Primary Industries Levies and Charges Disbursement Act 2024](#), is summarised below.

OGWSP priorities/themes	National Agricultural Innovation Priorities	Science and Research Priorities
Research and Innovation		
Our place and product	Priority 1 Trusted exporter	Priority 1 Net zero Priority 4 Environment Priority 5 Resilience
Our sustainability	Priority 2 Climate resilience Priority 3 Biosecurity	Priority 1 Net zero Priority 3 First Nations Priority 4 Environment Priority 5 Resilience
Our people	Priority 1 Trusted exporter Priority 2 Climate resilience Priority 3 Biosecurity Priority 4 Digital ag	Priority 1 Net zero Priority 3 First Nations Priority 4 Environment Priority 5 Resilience
Our systems and infrastructure	Priority 4 Digital ag	Priority 1 Net zero Priority 4 Environment Priority 5 Resilience

The National Agricultural Innovation Priorities are:

1. Australia is a trusted exporter of premium food and agricultural products by 2030
2. Australia will champion climate resilience to increase the productivity, profitability and sustainability of the agricultural sector by 2030
3. Australia is a world leader in preventing and rapidly responding to significant incursions of pests and diseases through futureproofing our biosecurity system by 2030, and
4. Australia is a mature adopter, developer and exporter of digital agriculture by 2030.

The National Science and Research Priorities are:

1. Transitioning to a net zero future
2. Supporting healthy and thriving communities
3. Elevating Aboriginal and Torres Strait Islander knowledge systems
4. Protecting and restoring Australia’s environment, and
5. Building a secure and resilient nation.



Financial management

Wine Australia is primarily funded by grapegrowers and winemakers through levies and user-pays charges, and by the Australian Government, which provides matching funding for R&I investments.

We have four primary categories of funding:

1. Research and Innovation (R&I) funding

The grape research levy (grapegrowers pay \$2 per tonne of winegrapes crushed), the R&I component of the wine grape levy (wine producers pay \$5 per tonne of winegrapes crushed) and additional cash contributions from partners are matched dollar-for-dollar by the Australian Government⁹.

2. Marketing funding

Wineries pay the promotion component of the wine grape levy in a stepped amount per tonne. The promotion component is payable on grapes delivered to a winery once the threshold of 10 tonnes has been reached.

Wine exporters pay the wine export charge on wine produced in and exported from Australia. The amount of charge payable is based on the FOB sales value of wine for the charge year.

Wine businesses and regional associations also pay voluntary contributions to participate in marketing activities (referred to as user-pay activities).

3. Regulatory funding

Regulatory activities are required to be funded on a cost-recovery basis through activity-based fees.

4. Grants and other funding opportunities

Wine Australia applies for state and federal grants to support R&I, marketing and market access activities either directly or through partners.

One of the opportunities over the next five years is to leverage this funding further. Levies are not indexed, which reduces their purchasing power year on year.

To mitigate against this, Wine Australia plans to establish the Australian Wine Future Fund, inspired by Hort Innovation's initiative, [Frontiers](#).

The Australian Wine Future Fund would be financed through a mix of non-levy contributions from industry partners, research providers, and investors and Commonwealth matching. Its goal is to secure additional funding for higher risk research and innovation projects, with a focus on attracting cash investments from partners. By aligning with the strategic priorities outlined in this Strategic Plan, the Australian Wine Future Fund seeks to amplify the impact of levies and drive greater industry success.

There are two investment pathways under the Australian Wine Future Fund:

- A research and innovation fund operating as currently with cash co-contributions of \$12.5 million over five years generating additional matching of \$10 million.
- A venture capital fund, into which we will invest up to \$2.5 million over five years, generating at least five times leverage by attracting non-levy investments for key R&I initiatives and innovative ventures, ultimately enhancing the long-term sustainability and growth of the wine sector.

Not all funding will be received by Wine Australia directly. Wine Australia's role within the sector is to bring funding in across all businesses, for the benefit of the wider sector.

Resource allocation

The budget to deliver against the priorities of this 2025–30 Strategic Plan assumes a conservative estimate of additional revenue and does not include likely revenue growth through the venture capital fund. Additional income from the Australian Wine Future Fund will be allocated through the annual operational plan and annual budget processes.

The model is based on the following assumptions:

- A 1.55 million tonne vintage each year. This is significantly lower than the ten-year average of 1.7 million tonnes.
- A 1.5% increase in the Wine Export Charge based on a 1.5% increase in export value growth.
- A 3% increase in Regulatory Services fees per annum.

⁹ Expenditure by Wine Australia on eligible activities is matched up to 0.5% of the average gross value of production amount. 1.6 cents and 2.4 cents of the \$2 and \$5 per tonne levies respectively is provided to Plant Health Australia

	FY26	FY27	FY28	FY29	FY30	5 year total
Income						
Levies	16,612,610	16,656,502	16,701,052	16,746,270	16,792,166	83,508,599
Commonwealth matching	14,000,000	14,000,000	14,000,000	14,000,000	14,000,000	70,000,000
Future Fund	2,000,000	2,250,000	2,500,000	2,750,000	3,000,000	12,500,000
Other external investment	821,678	664,590	106,670	-	-	1,592,938
Grants	10,750,000	10,750,000	10,750,000	10,750,000	10,750,000	53,750,000
Fees and charges	4,656,756	4,838,911	5,028,219	5,224,987	5,429,538	25,178,411
User Pays	2,287,778	2,446,778	2,287,778	2,116,778	2,287,778	11,426,889
Other	79,200	79,200	79,200	79,200	79,200	396,000
Total Income	51,208,022	51,685,981	51,452,919	51,667,235	52,338,682	258,352,837
Expenditure						
Research and Innovation	22,488,407	22,498,923	22,189,361	22,293,609	22,575,034	112,045,334
Marketing Development	10,192,244	10,343,563	10,108,021	9,968,082	10,324,537	50,936,448
Regulatory Services	4,717,475	4,895,605	5,081,073	5,361,669	5,443,006	25,498,828
Future Fund	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	20,000,000
Grants	10,000,000	10,000,000	10,000,000	10,000,000	10,000,000	50,000,000
Total Expenditure	51,398,127	51,738,091	51,378,455	51,623,360	52,342,577	258,480,610
Surplus (deficit)	(190,105)	(52,110)	74,463	43,875	(3,895)	(127,772)
Equity and Reserves	5,929,119	5,877,009	5,951,471	5,995,346	5,991,451	





Australian Government

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