INDUSTRY INSIGHTS EVENT 2025

WELCOME

We acknowledge the Traditional Custodians of the land on which we gather tonight. We pay our respects to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples here with us. We are grateful for the opportunity to meet and celebrate on this beautiful country.

Jim Markeas,
Chair, Riverland Wine

WINE GRAPE COUNCIL SA

riverland wine

Global Market Update

By Simone George, Ciatti Australia Pty Ltd

Water Market Update

By Paul Cooper, Ruralco Water

Regional irrigation outlook

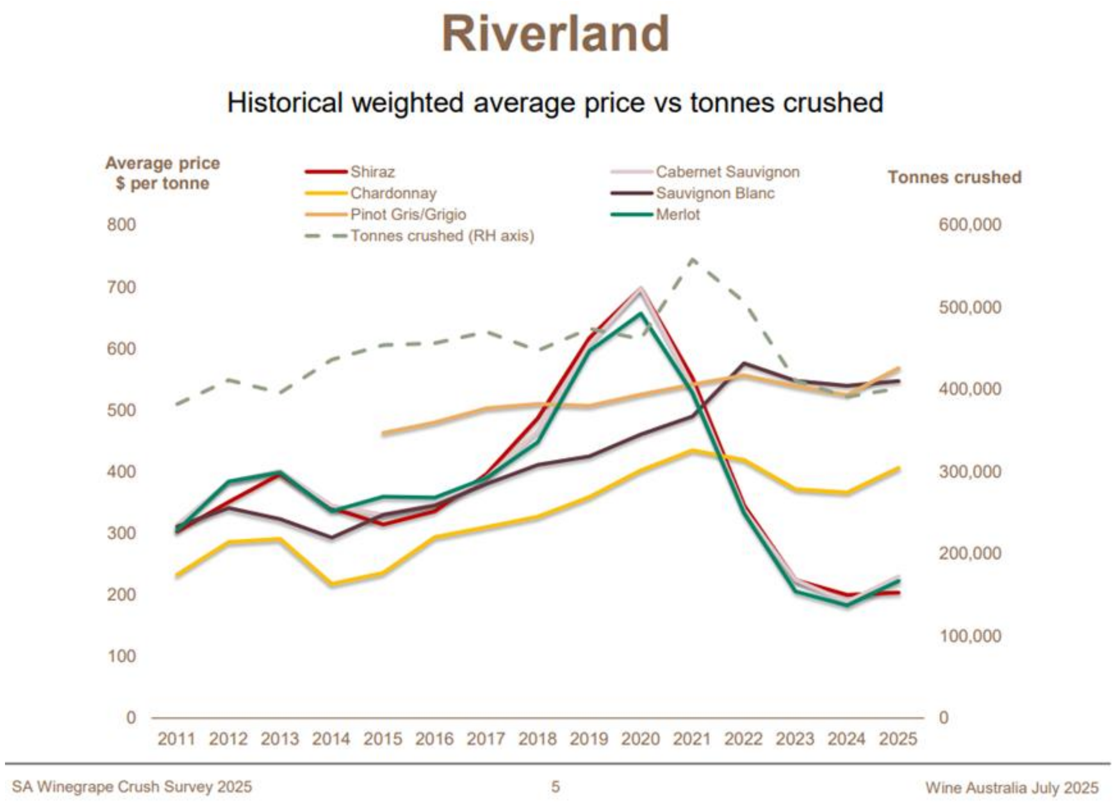
By Greg McCarron, Central Irrigation Trust

Agriculture services and supplies outlook

By Nicole Pitman, Elders Barmera

Vineyard Resting with Ethephon Application

By Dr Paul Petrie, SARDI | Department of Primary Industries and Regions SA



WINE GRAPE COUNCIL SA

Alex Cannon-Leyson,
Executive Officer, Riverland Wine

riverland wine

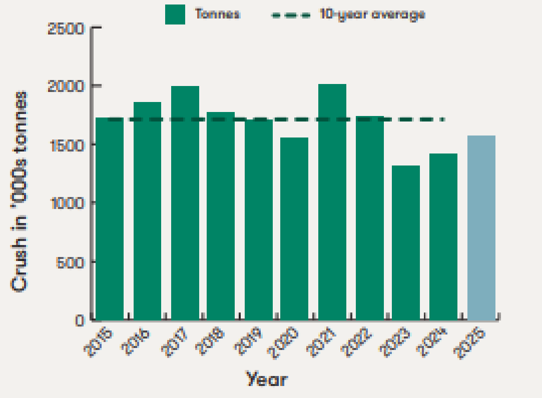
WINE GRAPE COUNCIL SA

riverland wine

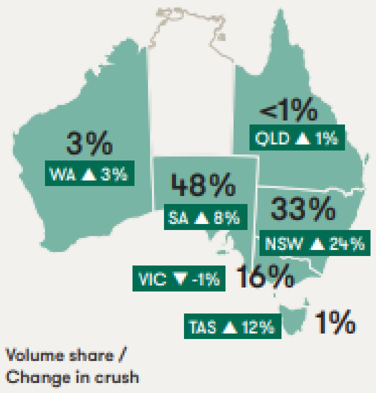
National Vintage Report 2025

Total crush	Total value	Average purchase price	Red grapes	White grapes
1.57 million tonnes	1.13 $ billion	604 $ per tonne	836 thousand tonnes	729 thousand tonnes
▲ 11%	▲ 14%	▼ -1%	▲ 20%	▲ 2%
			53%	47%

Historical crush



Crush by state



Crush by variety

Top 5 red varieties ('000 tonnes)

Shiraz	361	▲ 23%
Cabernet Sauvignon	212	▲ 40%
Merlot	80	▲ 7%
Pinot Noir	58	▲ 20%
Grenache	16	▲ <1%

Top 5 white varieties ('000 tonnes)

Chardonnay	286	▼ -13%
Sauvignon Blanc	115	▲ 31%
Pinot Gris/Grigio	93	▲ 33%
Semillon	51	▲ 16%
Muscat Gordo Blanco	45	▼ -1%

GLOBAL MARKET INSIGHTS

2025 INDUSTRY INSIGHTS EVENT

SIMONE GEORGE
GLOBAL WINE & GRAPE BROKER

riverland wine

CIATTI
GLOBAL WINE & GRAPE BROKERS

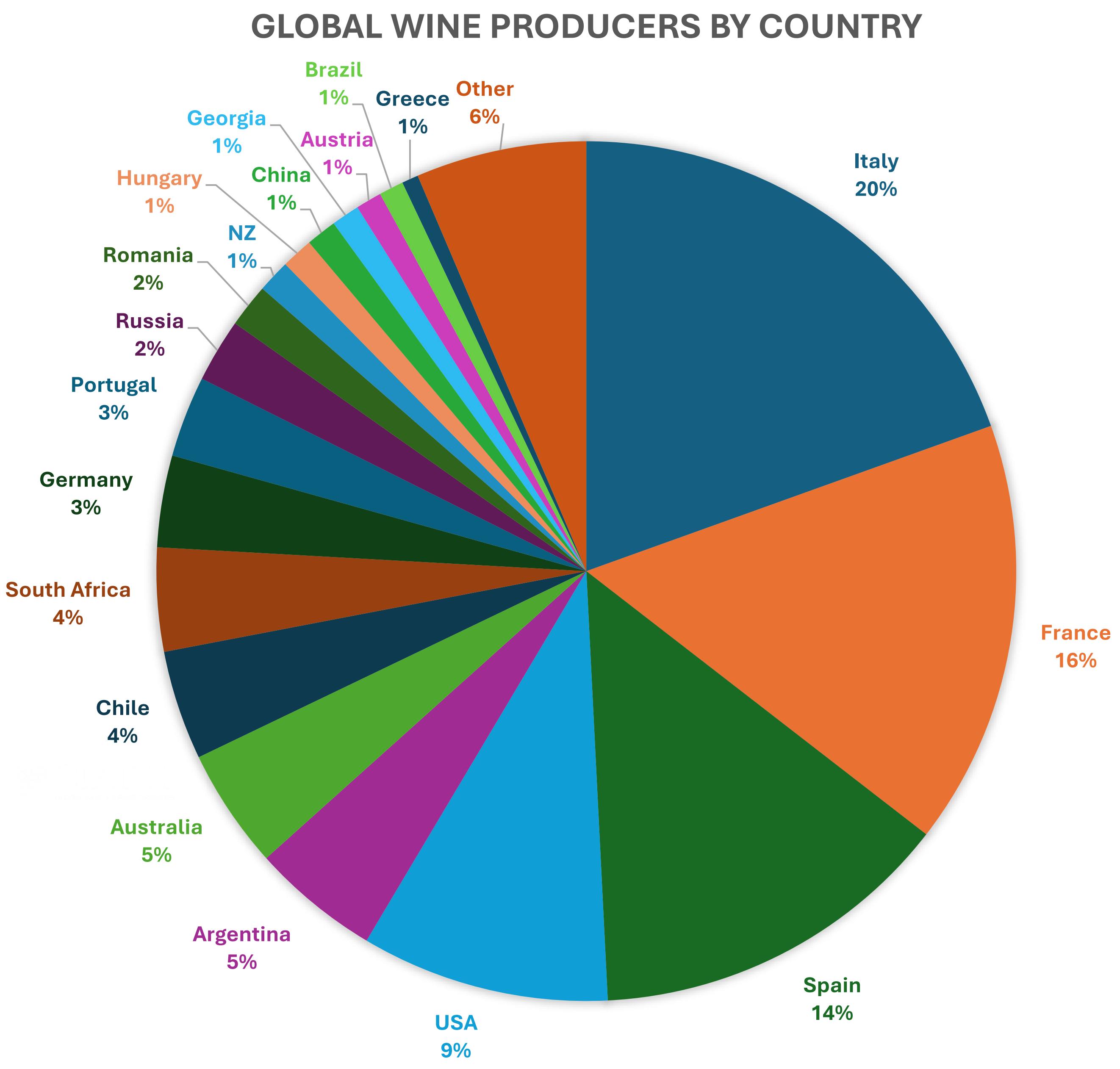
CIATTI COMPANY

- World's largest Grape & Wine Broker
- Formed in 1971
- 10x offices
- 21 brokers, 37 support staff
- Argentina, Australia, California, Canada, Chile, China, France, Germany, South Africa & Spain
- Bulk wine, grapes, concentrate, spirits & evaluation services
- Global Market Report
- Californian Market Report

GLOBAL WINE PRODUCTION

Vintage	Production (millions of hectoliters)
2024	225
2023	244
2022	259
2021	260
2020	259
2019	258

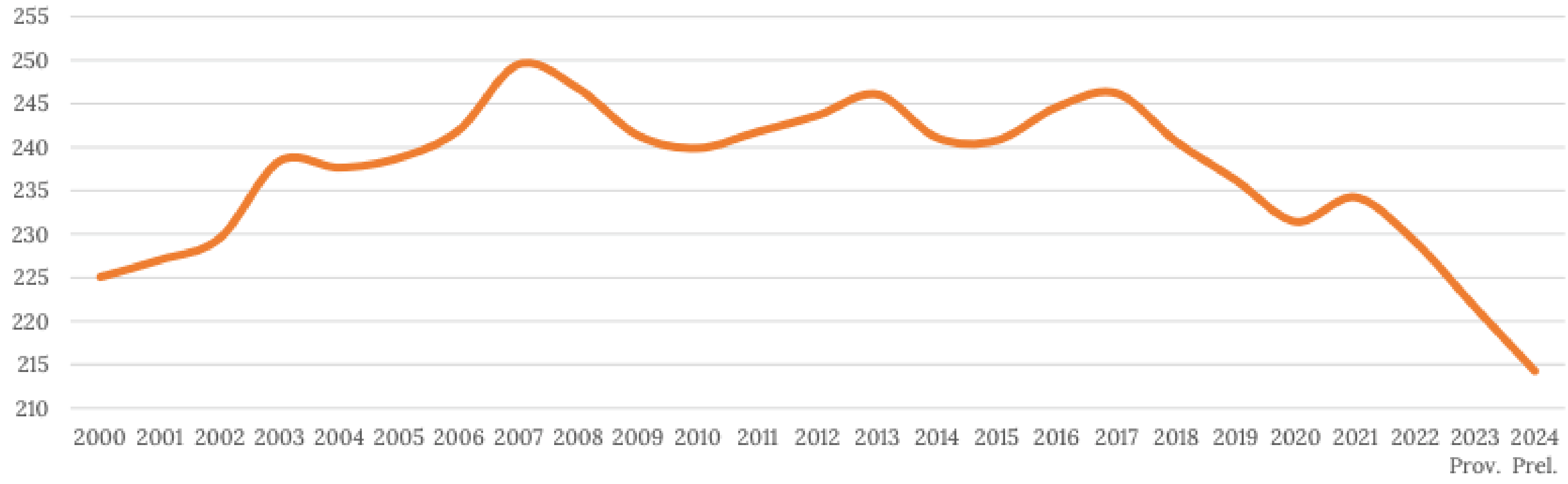
🍇 2024: the lowest crush volume in 60 years



OIV State of the World Vine & Wine Sector 2024

GLOBAL WINE CONSUMPTION: 2024

- 214.2 million hectoliters consumed
- Down 3.3% from 2023
- 225 million hectoliters of wine produced
- Excess of ~11 million hectoliters (1.1billion litres)



OIV State of the World Vine & Wine Sector 2024

🍷 2024: the lowest consumption level since 1961

AUSTRALIA

- 2023: 1.32MT | 2024: 1.43MT | 2025: 1.57MT
- Shiraz back as no.1 variety crushed by volume
- In demand: Chardonnay, Sauvignon Blanc, Pinot Gris
- Sauvignon Blanc – more plantings coming online | competition from Marlborough NZ
- In surplus: all reds
- Pricing: stable
- Challenges: water + input costs | Cancer Council tram adverts | lack of demand globally | domestic demand down -2.5%

Vintage	Variety	AUD/L
2025	Shiraz	$0.65 - 0.80
2025	Cabernet	$0.65 - 0.80
2025	Merlot	$0.65 - 0.80
NV	Dry Red	$0.55 - 0.65
2025	Chardonnay	$1.00 - 1.15
2025	Pinot Gris	$1.10 - 1.25
2025	Sauvignon Blanc	$0.95 - 1.10
NV	Dry White	$0.80 - 0.90

CHINA

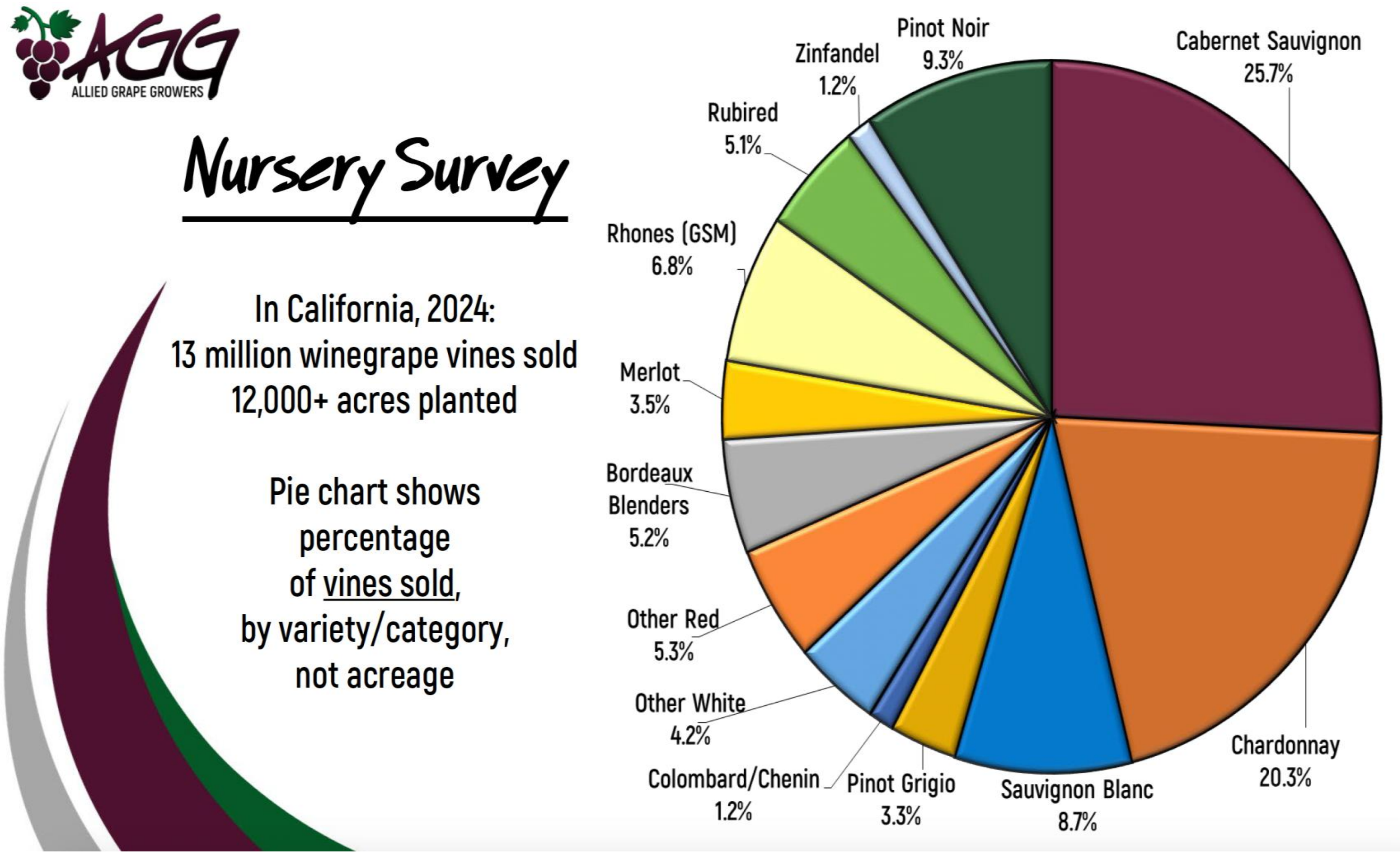
- More interest in cheap Dry Red | white wines | NZ Sauvignon Blanc | Penfolds
- Government alcohol restrictions – functions and public servant home life
- China wine consumption -19.3% by volume in 2024
- Total wine imports to China down: 2018 = 668 million litres | 2024 = 244 million litres
- Countries have seen declines in volume in 2024: France ↓19% | Chile ↓21%
  Italy ↓6% | Spain ↓35% | South Africa ↓57% | NZ ↑21% | Germany ↑12%
- Baijiu sales up +5.3% (2024) | 6 of the top 10 global spirits brands are Baijiu brands | Moutai worth USD $58.4 billion
- France is the biggest <u>bottled</u> wine supplier by volume to China (44mL)
- Chile is the biggest <u>bulk</u> supplier by volume to China (55mL)

USA - CALIFORNIA

- 2024 crop: 2.84 million tons = smallest size in 20 years
  2023 crop: 3.66 million tons
- Grapes being left on the vine
  600,000+ tons in 2024
  400,000+ tons in 2023
- Wine consumption -5.8%
- US Surgeon General warning
- Beverage competition | cannabis | hard seltzers | CBD/THC mixed drinks
- Tariff uncertainty
- Bulk wine market remains sluggish | spot buys
- Prices are stable
- Demand for Australian CHA, SAB, PIG
- Vines removed for land | rent out for solar panels

Vintage	Variety	USD ExW
2023	Cabernet Sauvignon	$1.29 - 1.49
2023	Shiraz	$1.19 - 1.39
2023	Merlot	$1.19 - 1.39
2023	Dry Red	$1.10 - 1.29
2024	Chardonnay	$1.40 - 1.80
2024	Pinot Gris	$1.40 - 1.59
2024	Dry White	$1.05 - 1.15

USA - CALIFORNIA



2024 vintage
- 600,000 tons excess fruit
- Removing Zinfandel

Vine pull:
- 50,000+ acres need to be removed
- 37,500 was removed
- 17,500 was planted

Plantings:
- Cabernet
- Chardonnay
- 81.5% of vines sold to coastal areas – not the interior, irrigated area
- Little interest in Shiraz

Other crops
- nuts
- citrus
- land leased for solar farms

CHILE

Vintage	Variety	USD FOB	Trend
2025	Cabernet Sauvignon	$0.60 - 0.80	-
2025	Shiraz	$0.65 - 0.80	-
2025	Merlot	$0.60 - 0.70	-
NV	Dry Red	$0.52 - 0.57	-
2025	Chardonnay	$0.90 - 1.05	-
2025	Sauvignon Blanc	$0.90 - 1.05	-
2025	Pinot Gris	$1.00 - 1.10	-
NV	Dry White	$0.65 - 0.70	↑

- 2025 crush figure down by 25%
- Vine pull | reds & old vines | ~15% in 2023 | ~10% in 2024
- Whites are tighter in supply than reds
- Good demand for Sauvignon Blanc
- Prices are stable
- Biggest bulk competitor to Australian into USA & Canadian markets | 10% tariff
- Selling into China | Bulk 55ML | Bottled 33ML

EUROPE: FRANCE, ITALY & SPAIN

- **Hot and dry weather | solid winter rainfall**
- **Larger crops expected in 2025**
- **Smaller sized crops seen in 2024 (drought)**

- **Sluggish red wine sales | holiday season**
- **More interest in white wine**
- **USA 30% tariffs on EU**

France

- 2023 47.2 MHL | 2024 36.1 MHL
- Long red wine inventories
- Decrease in consumption -3.6%
- Vine pull in Bordeaux | Cabernet & Merlot |
  9,300 hectares or ~9% | €6,000/hectare
- Brandy to China | 34.9% tariff for 5 years OR
  minimum sale price for big 3: Pernod, LVMH, Rémy
- Distillation Plan
  2021 320mL €0.58-0.78/L €211m
  2023 220mL €0.45-0.65-0.75/L €215m

Italy

- 2023 38.3MHL | 2024 44.1 MHL
- 2025 = less white wine & grape juice concentrate
- Prosecco sales remain strong
- Increase in consumption +0.1%

Spain

- 2023 28.4 MHL | 2024 31.0 MHL
- Distillation Plan: 2020 €90M €0.30-0.40/L
- Increase in consumption +1.2%

SUMMARY

2025 Australian crop size vs global supply

Grape prices in 2026 | water & input costs

Vine pull | exit strategy

Australia: competitive prices

Shift in consumer preference to white wines

Health conscious | Ozempic | Cancer Council | World Health Organisation

Beverage competition | CBD/THC infused drinks | Seltzers | Kombucha

OIV: wine consumption declining in most countries
China -19.3% | Canada -6.4% | USA -5.8% | France -3.6%
Germany -3.0% | South Africa -2.8% | Australia -2.7% | Argentina -1.2%

Increase in consumption: Italy +0.1% | Spain +1.2%

CIATTI

GLOBAL WINE & GRAPE BROKERS

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www.ciatti.com

Global Market Report

Californian Market Report

Ruralco WATER

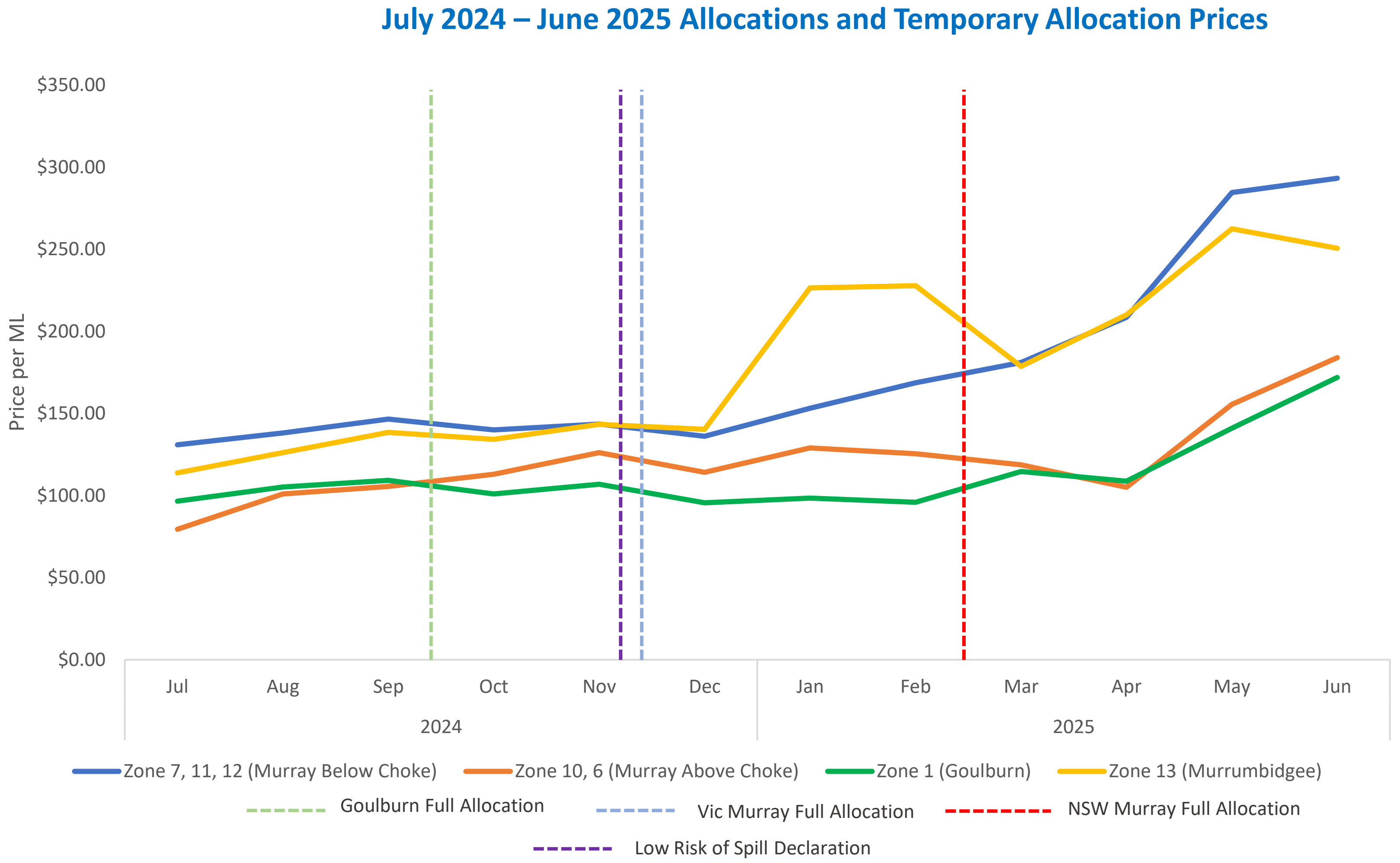
Riverland Wine

Industry Insights

2024-2025 Season Recap and 2025–2026 Outlook

2024 – 2025 Allocation market summary

- **Large Carryover Volume from 2023/24 supplied into the market;**
- **Full Allocations VIC Murray; VIC Goulburn; NSW Murray; SA Murray**
- **Large volume of Forward Allocations purchased 23/24**
- **Low Risk of Spill Declared in November**
- **IVT encumbrances, Bidgee, Goulburn, Above Choke (price disparity)**



Government buybacks update

- Act states 450GL "Best endeavours" by Dec 2027
- Approx 132GL already secured and another 155GL planned for end of 2025 = 287GL
- Review Sept 2026 consider progress / funding to inform future policy

Total purchase value so far = $121,581,874

Voluntary water purchases	Accepted [GL] (LTDLE)	To go
70GL Tender - Private Diverters	23	47
EOI 1 - IIO's / Goulburn	0	40
EOI 2 Water Funds	27	33
Total	**50**	**120**

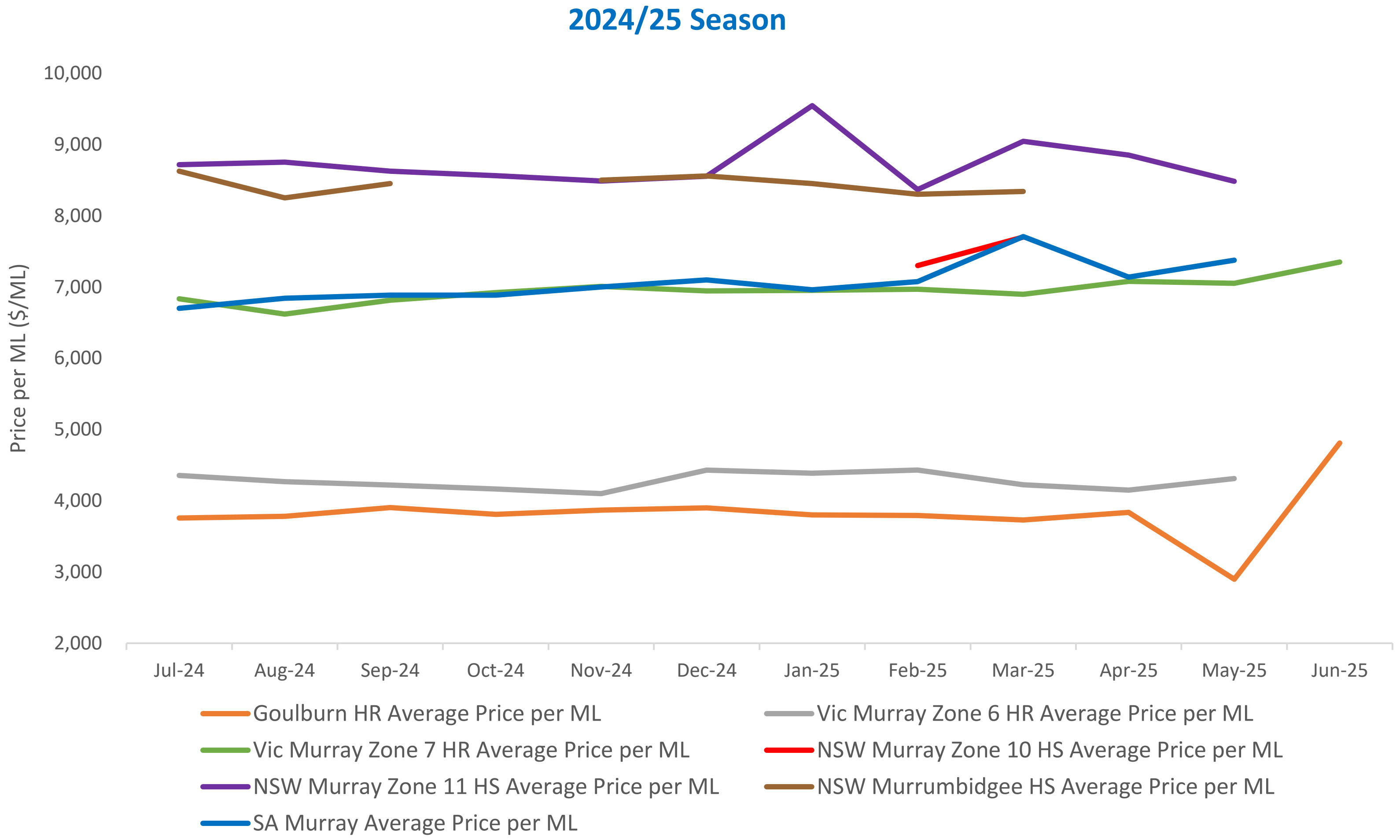
Total Purchase value is from Austender data

Class 3, HR, HS Permanent entitlement markets

- **Potential for growth;**

- **Changes to IVT processes has altered portfolio diversification**

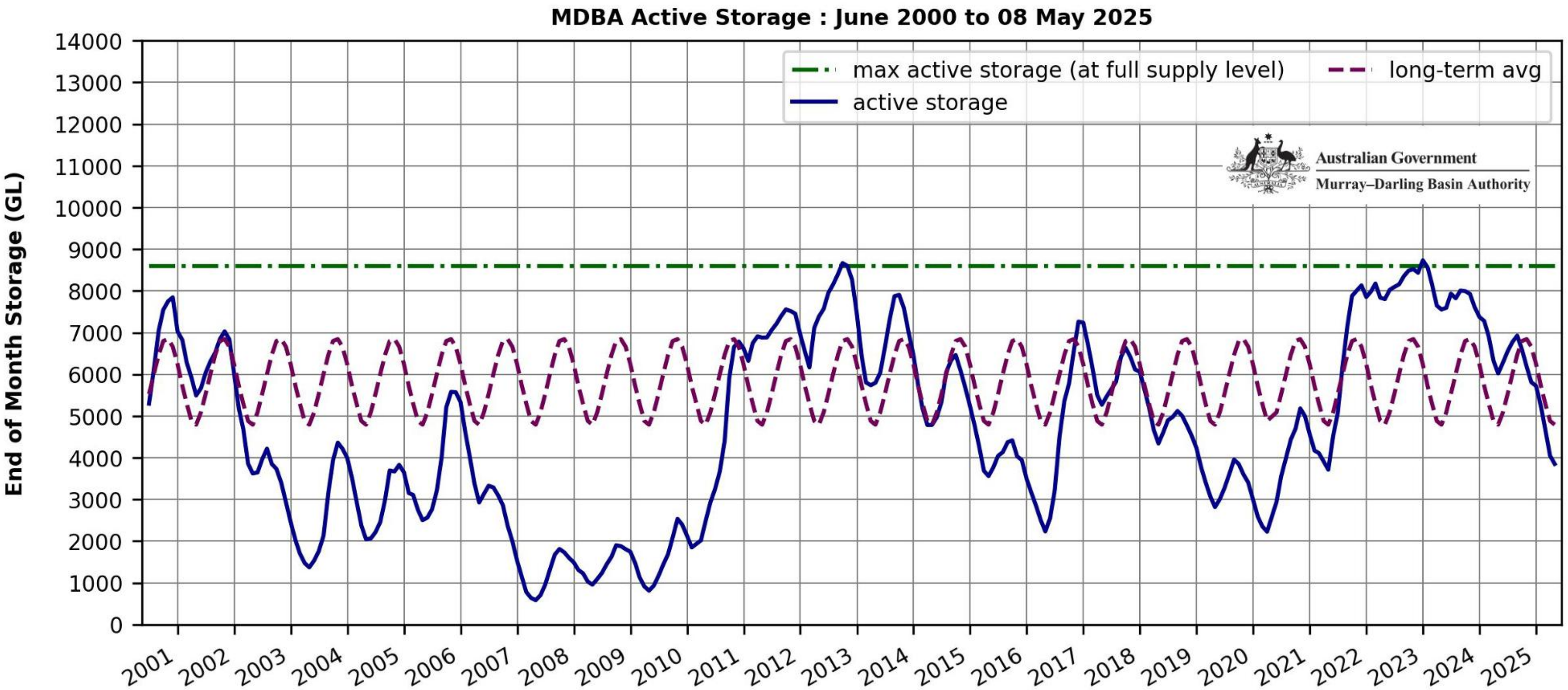
- **Commonwealth purchases have increased volume traded**



2025–2026 Outlook

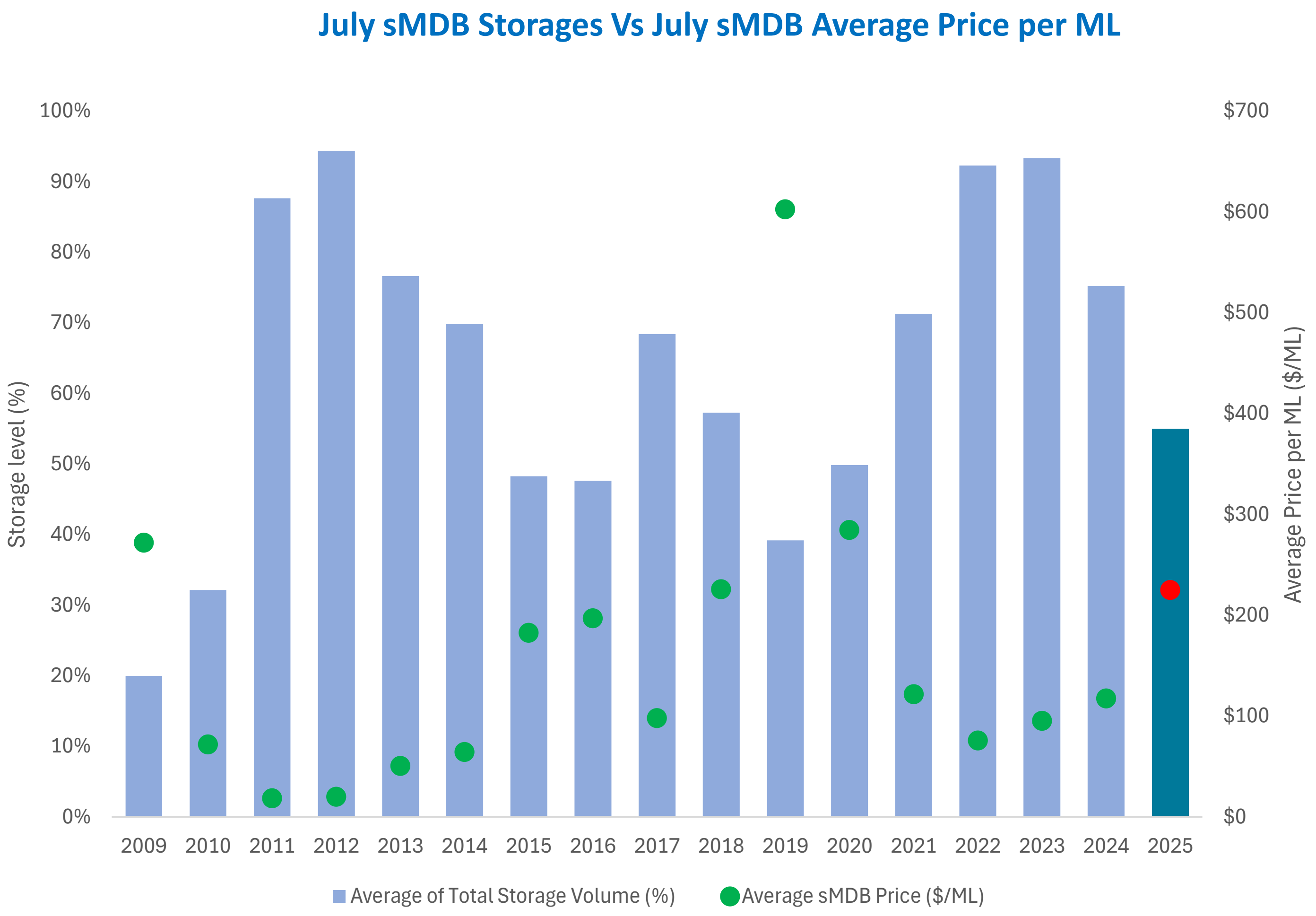
Water in Storage

- **Dry Conditions emerging;**
- **Menindee Inflows are around 880GL since early April;**
- **MDB 62% Jul 25 v 78% July 24**



July Storages v Opening Allocation Price

- **Similar Year 2018/19**
- **Below choke opening price $345/ML**



NSW Murray Allocation Forecast

- High Security = 97%
- General Security = 1%
- 31% carryover from 24/25 season

Historical Inflow Conditions	1 September 2025	1 November 2025
Mean	18%	32%
Dry	10%	20%
Very Dry	1%	7%
Extreme (Pre 2004 min)	1%	1%

Forecasts current as of 15/5/2025

Vic Murray Allocation Forecast

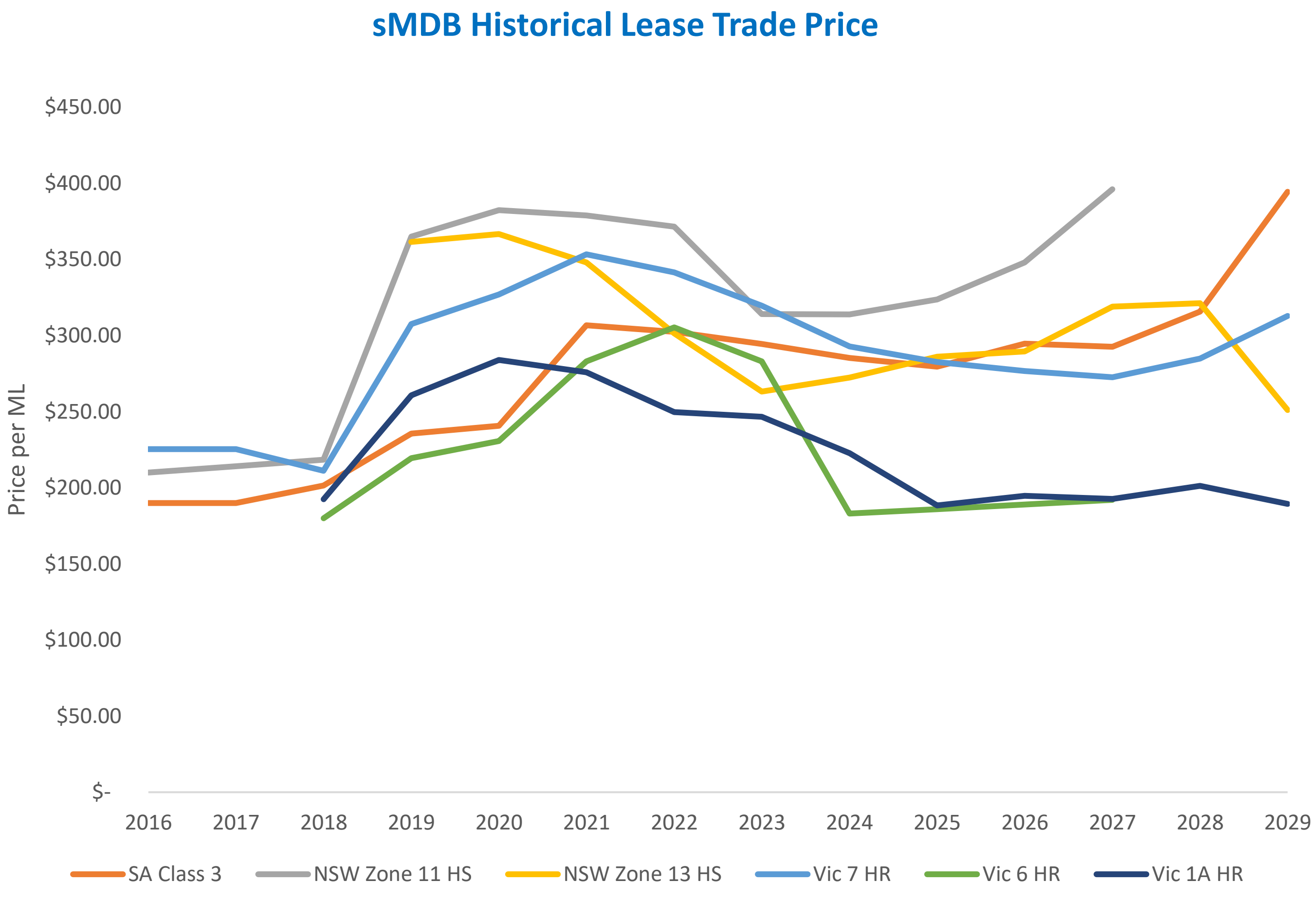
- High Reliability = 40%
- Low Reliability = 0%
- Dry-Average scenario

Inflow Conditions	1 July 2025	15 Aug 2025	15 Oct 2025	16 Feb 2025
Wet	47%	74%	100%	100%
Average	41%	57%	93%	100%
Dry	35%	49%	67%	97%
Extreme Dry	31%	40%	43%	48%

Forecasts current as of 15/5/2025

Permanent entitlement lease market

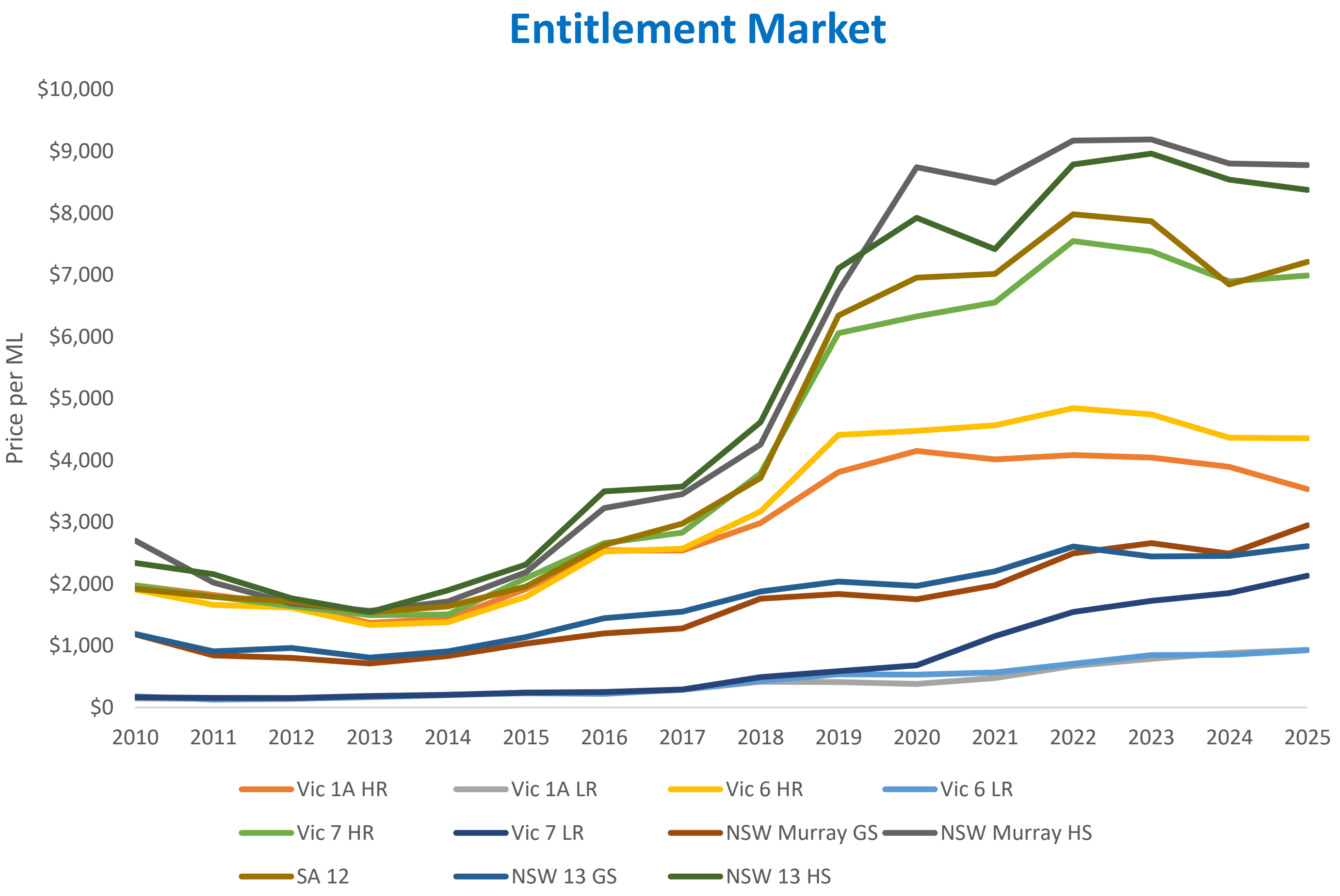
- Increase demand for security;
- Upwards pressure on pricing;
- Supply may thin out as suppliers are selling to Commonwealth;



Impact on permanent entitlement markets

- Goulburn IVT changes downward pressure on Entitlement value

- Ongoing dry conditions and improving commodity prices upward pressure on Entitlements



Summary

- Dry Conditions possible;
- Lower (Opening) Allocations;
- Ongoing Water recovery; initiatives (buy-backs);
- Increased demand (below choke) Permanent plantings;
- Increased Entitlement Prices;
- Diversification;

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Regional Irrigation Insights

July 2025

Water Availability in SA

CIT Response

Regional Support Water Recovery

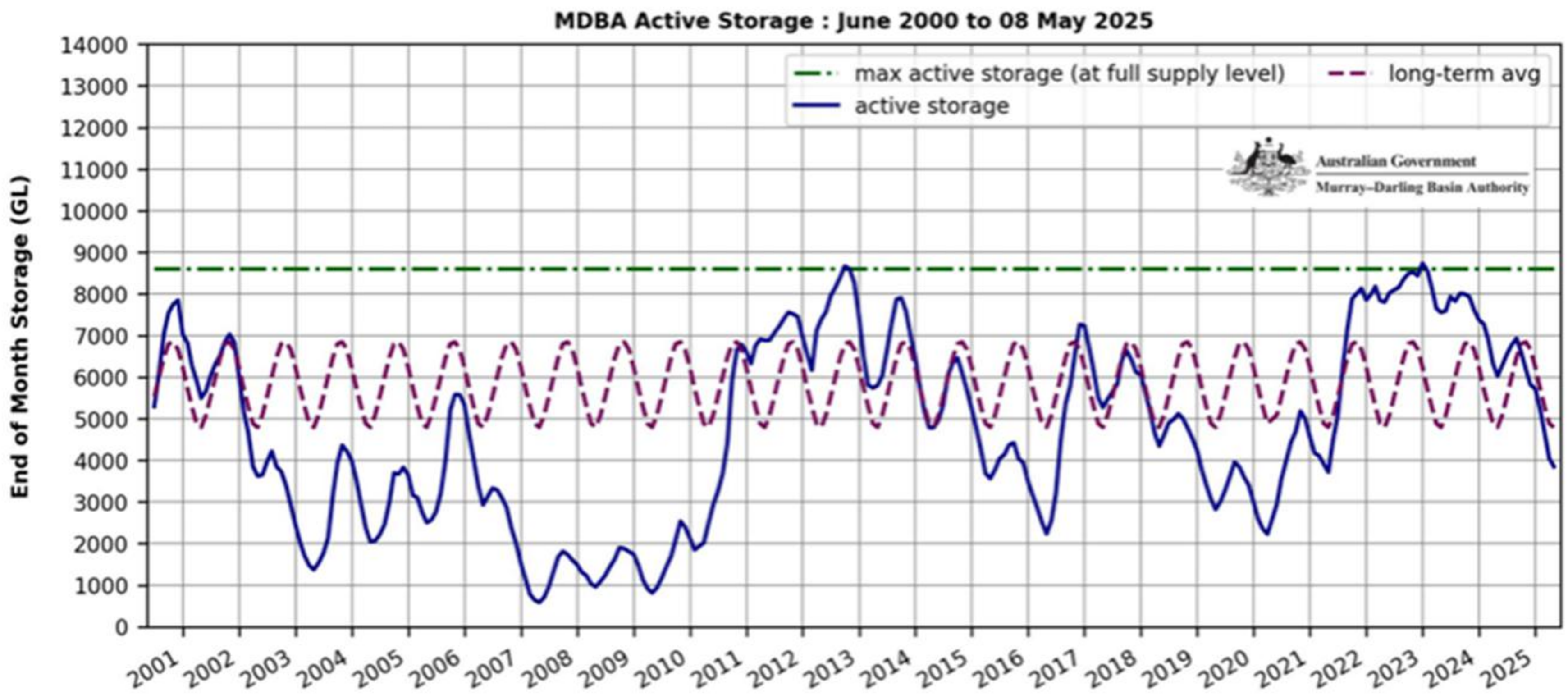
Basin Plan

MDB Water Storages

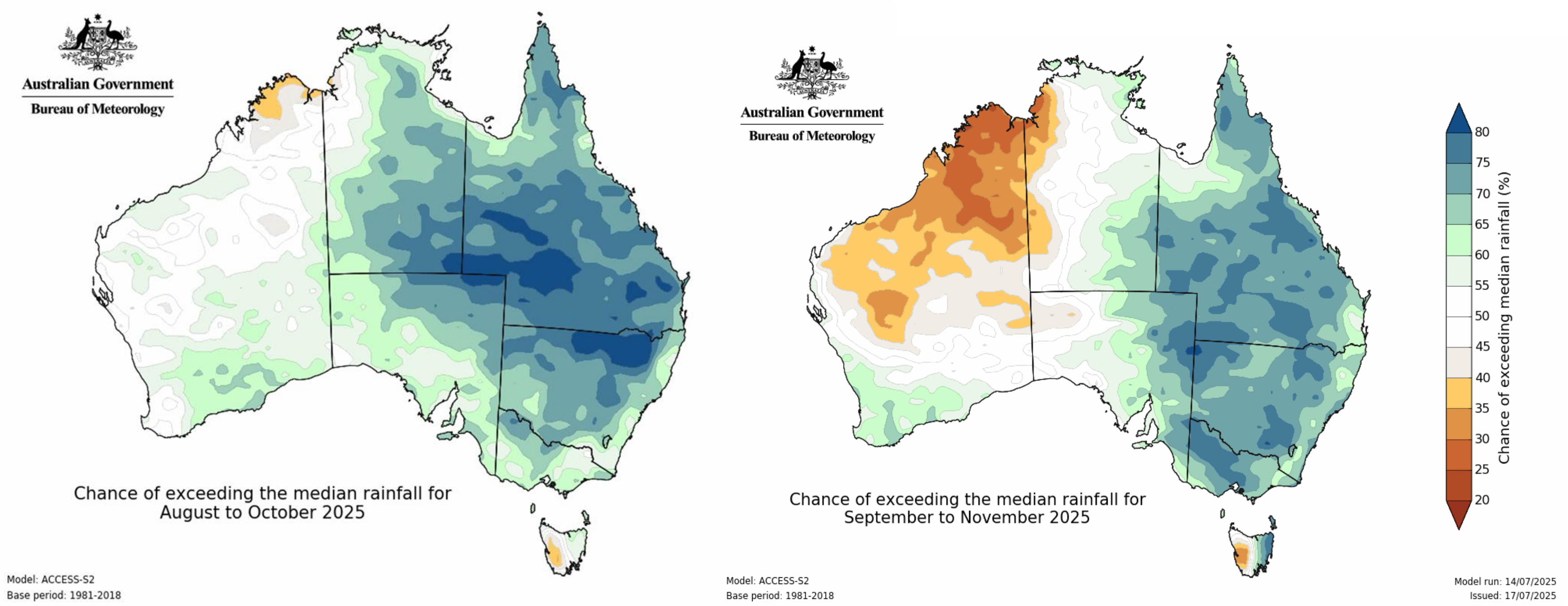
Water Storages are lower recent years. Water availability throughout 2025-26 and into 2026-27 will be dependent on rainfall in the catchment area

Storage	Full Storage	July 2025		July 2024	
	GL	GL	%	GL	%
Dartmouth	3,856	2,568	66%	3,652	94%
Hume	3,005	1289	42%	2108	70%
Lake Victoria	677	413	61%	522	77%
Menindee Lakes	1,731	1348	77%	1111	64%
Lake Eildon	3,334	1,906	57%	2,907	87%
Burrinjuck	1,026	500	48%	786	76%
Blowering	1,633	844	51%	1,239	78%
TOTAL	**15,262**	**8,868**	**58%**	**12,235**	**80%**

MDB Water Storages



Rainfall Outlooks



CIT Response

- Prioritising Long Term Viability & Risk Management
  - Maintain Asset Maintenance & Replacement
  - Income from non water service sources
  - Efficient Operations
- Proposing CIT water charges unchanged for 2025/26
- Flexible Payment Arrangements
- Increased Account and Water Use Information
- Electricity – cost/contracts/batteries/representation

CIT Response

- National Water Market Reform & CIT Water Exchange

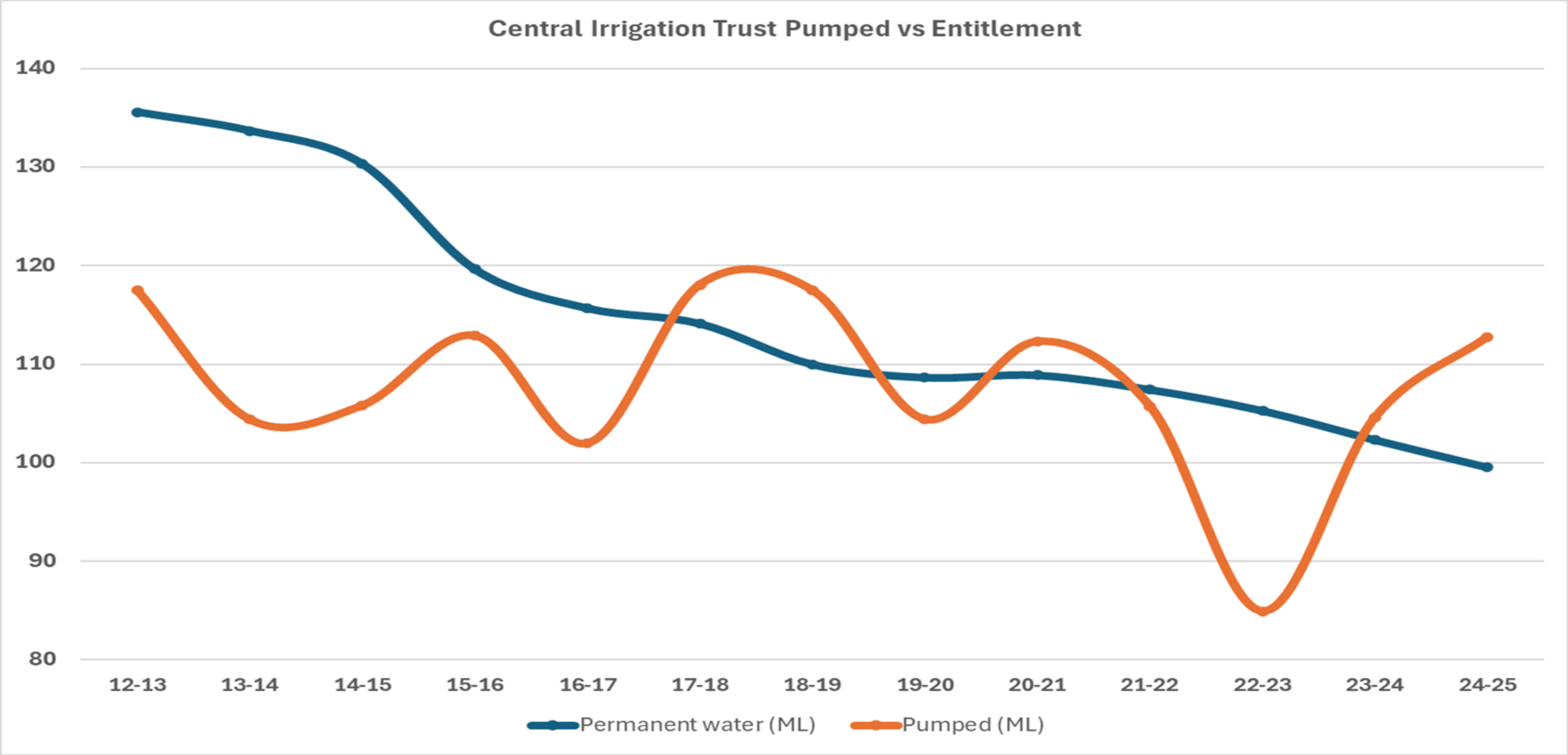
Data reform – Trade applications	Intermediary Code	Water Market Decisions	Insider Trading and Market Manipulation	Broader data reform
1 July 2024	1 July 2025	1 July 2026	1 July 2026	1 July 2026

Intermediary Code – 1 July 2025

- Applies to the CIT Water Exchange
- Increased requirements for governance, reporting and record keeping
- Working to minimise flow on impacts to customers

CIT Response

- Water Account Balancing



CIT Response

From 1 July 2025 CIT water accounts must be balanced monthly

- Recognises increased risks with continuing reduction of permanent water entitlement held within CIT, which is now well below annual water use volumes
- Recognises increased reliance on the allocation market and exposure to the fluctuations in availability and price of water allocation
- Monthly meter readings and water use graphs sent each month.
- Real-time water use data is available via telemetry
- Water account information is accessible through the Customer Portal on the CIT website

Understand this change may impact your current practices and CIT will provide guidance and reminders during the first few months of implementation, monitor the transition closely and remain flexible to address any unforeseen challenges

SA Government and other organisations remaining quarterly but using other mechanisms to manage risk e.g. quarterly fines, forced balancing option

Regional Support – Water Recovery

Regional Stakeholders and SA Government working on funding opportunities to offset impacts of Commonwealth Water Recovery

Resilient Rivers Water Infrastructure Program

- Stream A – Irrigation Infrastructure Operators Modernisation
- Stream B – Water Use Efficiency
- Stream D – Transition Planning funding for Basin states to undertake feasibility studies or to undertake project preliminaries via ‘seed funding’

Regional Support – Water Recovery

Sustainable Communities Program

- $20 million for SA to mitigate the social and economic impacts of water recovery in River Murray communities
- The funding is for direct investment in priority projects that are identified and co-designed with community that build capacity, help diversify economies and prepare for a future with less water
- Projects will include those that aim to:
  - retain and create new jobs
  - establish new industries
  - support existing industries to diversify and value add.
- PIRSA is leading the Sustainable Communities Program with support from DEW
- Roll out later in 2025 and concluding on 30 June 2028

Regional Water Bank – Irrigation Trusts?

Basin Plan - Implementation

- Basin targets to be met through water purchase/recovery and offset options
- Potential shortfall in SDLAM Projects (down water) and 450GL (up water) recovery
- Water Recovery - EOI 1

Catchment	Number of responses	Approx Volumes offered LTDLE (GL/y)	Market Trend Aligned LTDLE (GL/y)
Sub-Total (NSW)	383	100	40 - 55
Sub-Total (SA)	171	12	<5
Sub-Total (VIC)	466	50	10 - 20
TOTAL	1020	162	55 - 80

Basin Plan - Review

- 10 Yearly Review Requirement
- 4 Major Themes identified
    - Climate change,
    - First Nations,
    - Sustainable Water Limits,
    - Regulatory design
- Moving beyond 'just add water'

Agriculture Update

Nicole Pitman

Powdery Mildew

- Significant Powdery Mildew on Chardonnay last year above winery threshold , but still delivered
- False sense of adequate spray programs
- Rate, Timing, chemical choice, application
- Sulphur – what's the best brand ? Up to $10/bag difference
- Calibrate equipment , check coverage
- 10-14 days
- Still consider DMI, Azoxy, or Miravis

Downy Mildew

- Don’t expect for resellers to have enough Metalaxyl in stock to cover an outbreak/event.
- Have own stock in shed .
- Adama Metalaxyl liquid now made in Australia, but 5-7 day turn around
- Base Copper application on weather and if you can cover property in a 1-3 days prior
- Metalaxyl vs copper depends a lot on property’s spray capabilities, and the amount of risk owner is willing to take.

Fertilisers

- Urea pricing coming slowly back down
- Urea pricing will be impacted on Middle East and broadacre requirements, which impact UAN
- MAP – China supply limited , availability and pricing of concern

Herbicide

- Alion new pre-emergent herbicide
- 150ml/ha comes in1 Ltr
- Only needs 6ml of rain in 4 weeks
- Compatible with Glypho,Glufos, sprayseed
- $118/ha but up to 10 months weed control
- Group 29
- Follow correct mixing order

Alion 500® Herbicide

Significant Weed List

Broadleaf Weeds

Amaranthis *Amaranthus spp.*
Asthma weed *Euphorbia hyssopifolia, Euphorbia hirta*
Billy goat weed *Ageratum houstonianum*
Burr medic *Medicago polymorpha*
Canadian fleabane *Conyza canadensis*
Capeweed *Arctotheca calendula*
Catsear, Dandelion, Flatweed *Hypochaeris radicata*
Chickweed *Stellaria media*
Clover *Trifolium* sp.
Cobbler's pegs *Bidens pilosa*
Jersey Cudweed *Helichrysum luteoalbum*
Marshmallow, mallow, cheese weed *Malva spp.*
Paterson's curse *Echium plantagineum*
Scotch thistle *Onopordum acanthium*
Sow thistle, Milk thistle *Sonchus oleraceus*
Spear thistle *Cirsium vulgare*
Thickhead *Crassocephalum crepidioides*
Wild Radish *Raphanus raphanistrum*
Wireweed *Polygonum aviculare*

Grasses, Sedges, Rushes

Annual ryegrass *Lolium rigidum*
Awnless Barnyard grass, Barnyard grass *Echinochloa spp.*
Barley Grass *Hordeum leporinum*
Crabgrass *Digitaria ciliaris*
Crowsfoot grass *Eleusine indica*
Feather top Rhodes grass *Chloris virgata*
Guinea grass *Megathyrsus maximus*
Hairy Panic *Panicum effusum*
Knobby club rush *Ficinia nodosa*
Paspalum Paspalum dilatatum
Silvergrass *Vulpia bromoides*
Silvery hair grass *Aira cupaniana*
Soft brome *Bromus molis*
Summer grass *Digitaria sanguinalis*
Sweet vernal grass *Anthoxanthum odoratum*
Tall sedge *Carex appressa*
Toadrush *Juncus bufonius*
Wild oats *Avena sativa*
Windmill grass *Chloris truncata*
Winter grass *Poa annua*

Post Frost Yields

- If have good wood (eg lignified and at least pencil thick) generally yields are on the high side the following year.
- The yields also dependent on how they vineyard has been maintained after the frost
- Eg water and fertiliser

Water Requirements

- Winter irrigation 3-4 hours a fortnight
- Due to drought conditions be aware of Restricted Spring growth
- Symptoms – Failed budburst, poor shot growth and bunch growth
- Maintain moisture around rootzone especially before budburst

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Vineyard Resting

Paul Petrie & Gaston Sepulveda - SARDI
Marcos Bonada – TWE
24 July 2025

Wine Australia

Government of South Australia
Department of Primary Industries and Regions

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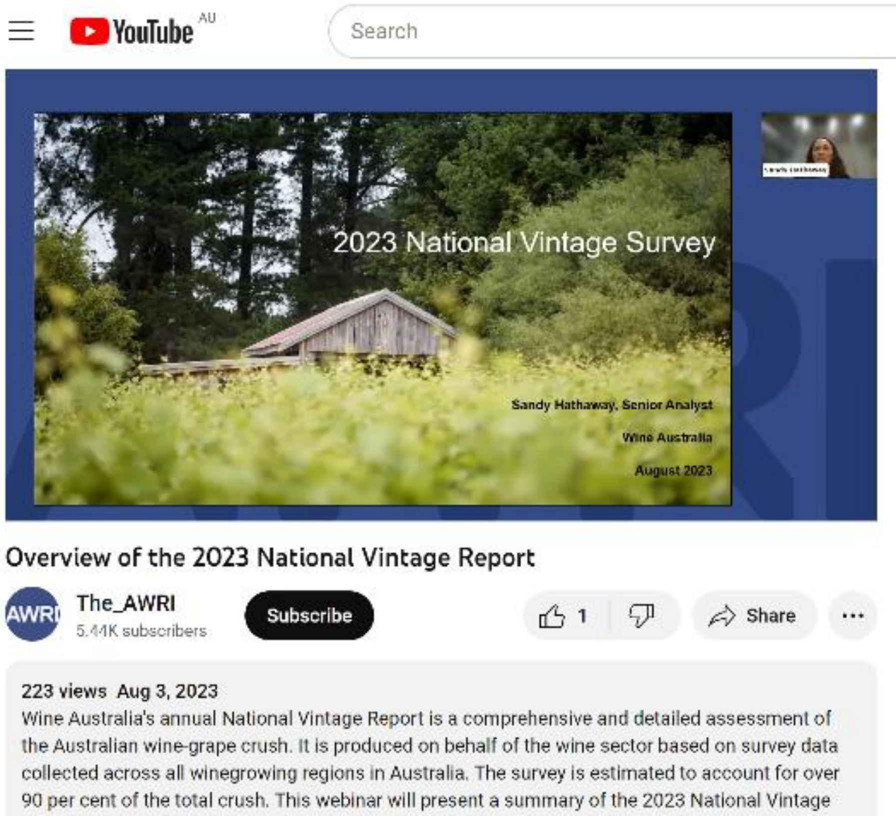
National Vintage Report



- Wine consumption decreasing
- Reds wine
  - Depressed prices internationally
  - Very high Australian stock-sales ratio
  - Unlikely to harvest all fruit

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Resting vineyard

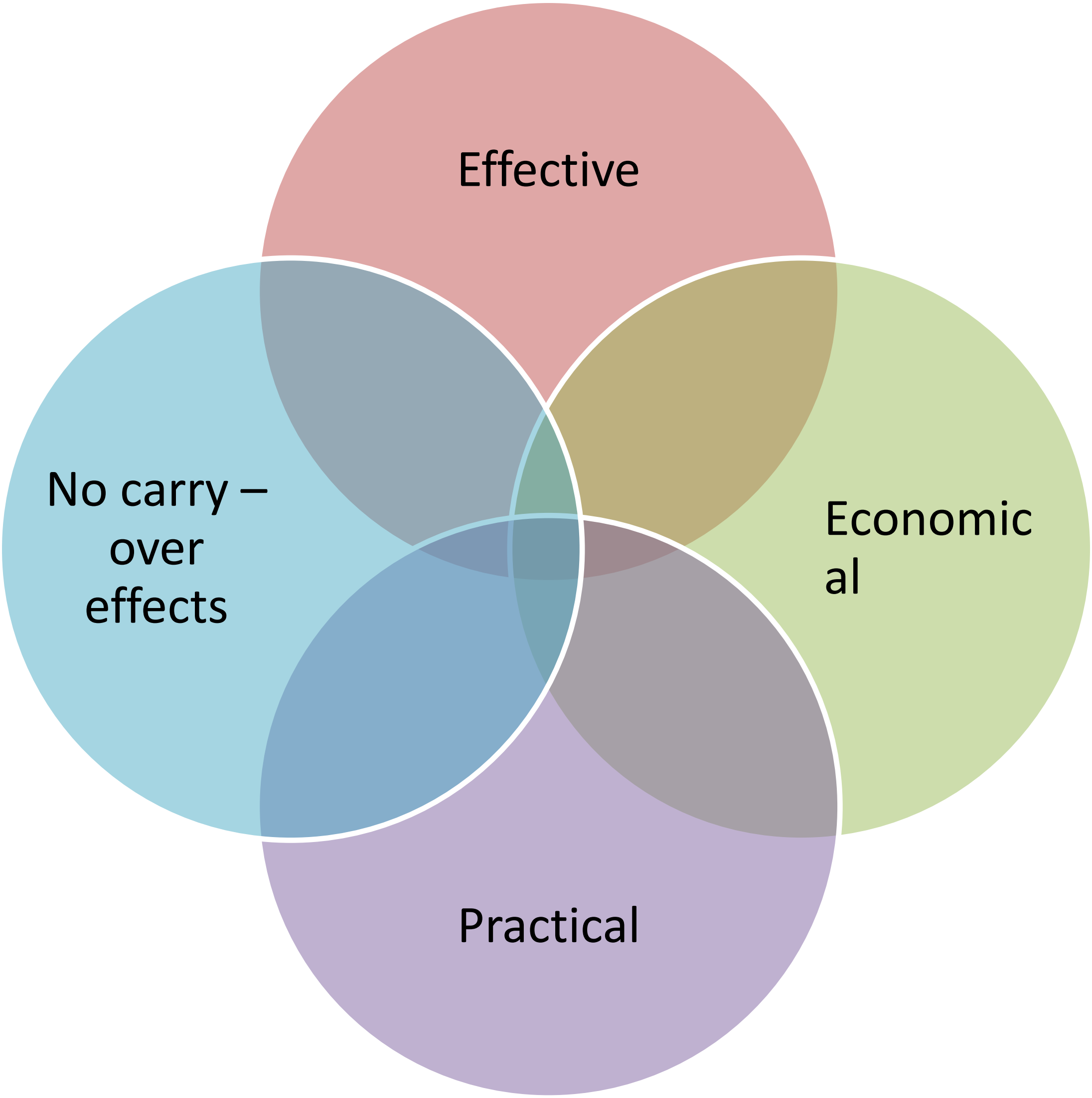
Reduce inputs

- Avoid harvest
- Pesticides
- Irrigation
- Tractor passes

Caveats

- Limited information
    - Dried fruit
- Carry-over effects

Close to ideal practice



- Effective = no harvest
- Align with the current set of practices
- Minimal implementation costs
- Not affect production in coming years

Assessed a range of treatments

- Shiraz (BVRC30) in Renmark

- Double pruning

  - 80% flowering

  - Avoid regrowth

Assessed a range of treatments

- 2 x applications of Calcium nitrate (2.5kg/100L)
  - 10 leaves & 80% flowering

Assessed a range of treatments

- 1 x Calcium nitrate + 1 x Ethephon (1000 mg/L)

  - 10 leaves & early fruit set
- 1 x Ethephon

  - early fruit set
- 2 x Ethephon
- - 80% flowering & early fruit set

Assessed a range of treatments

- 1 x Calcium nitrate + 1 x Ethephon (1000 mg/L)

  - 10 leaves & early fruit set

- 1 x Ethephon

  - early fruit set

- 2 x Ethephon

- - 80% flowering & early fruit set

Crop removal using Ethephon

Crop removal using Ethephon

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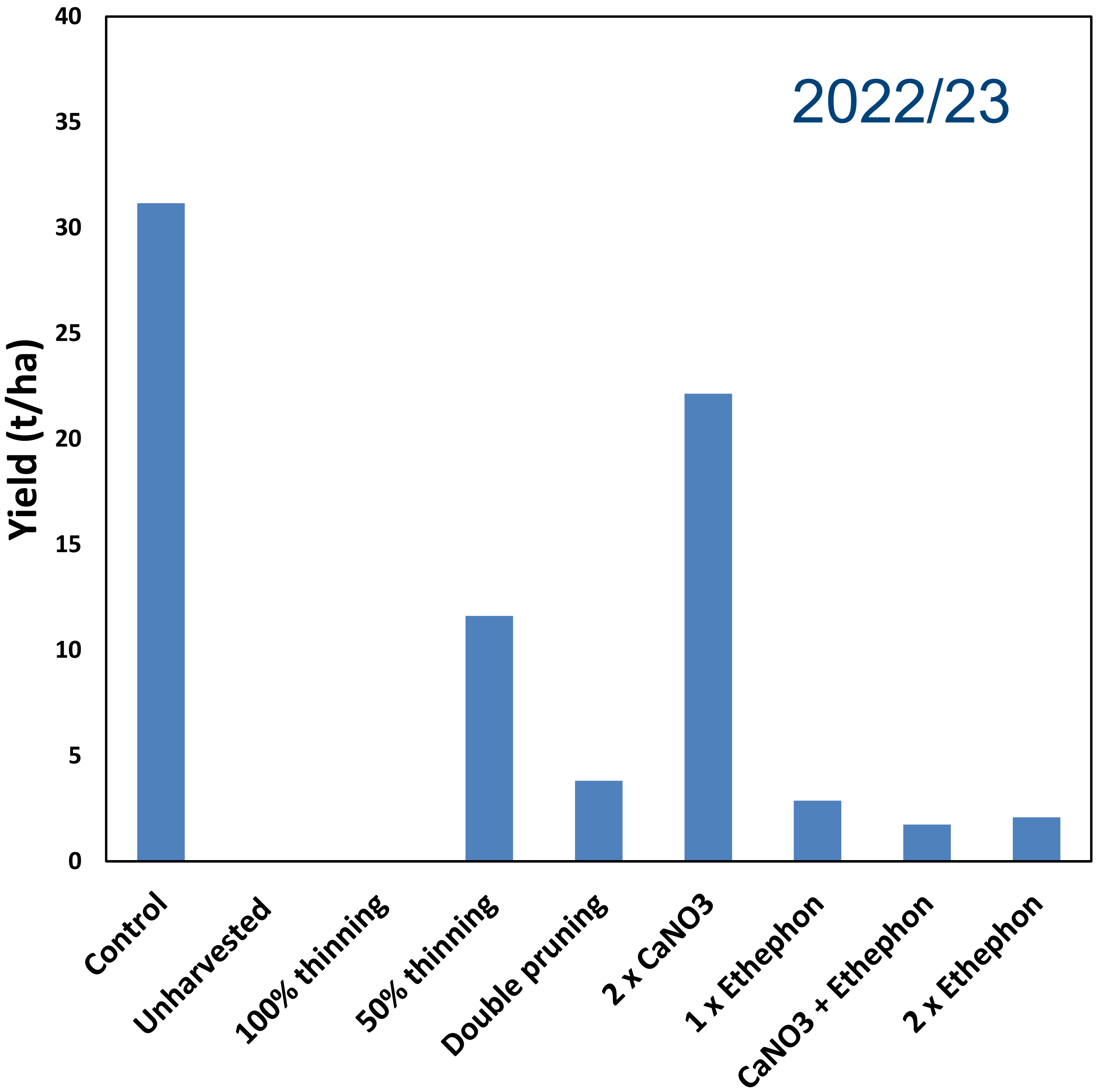
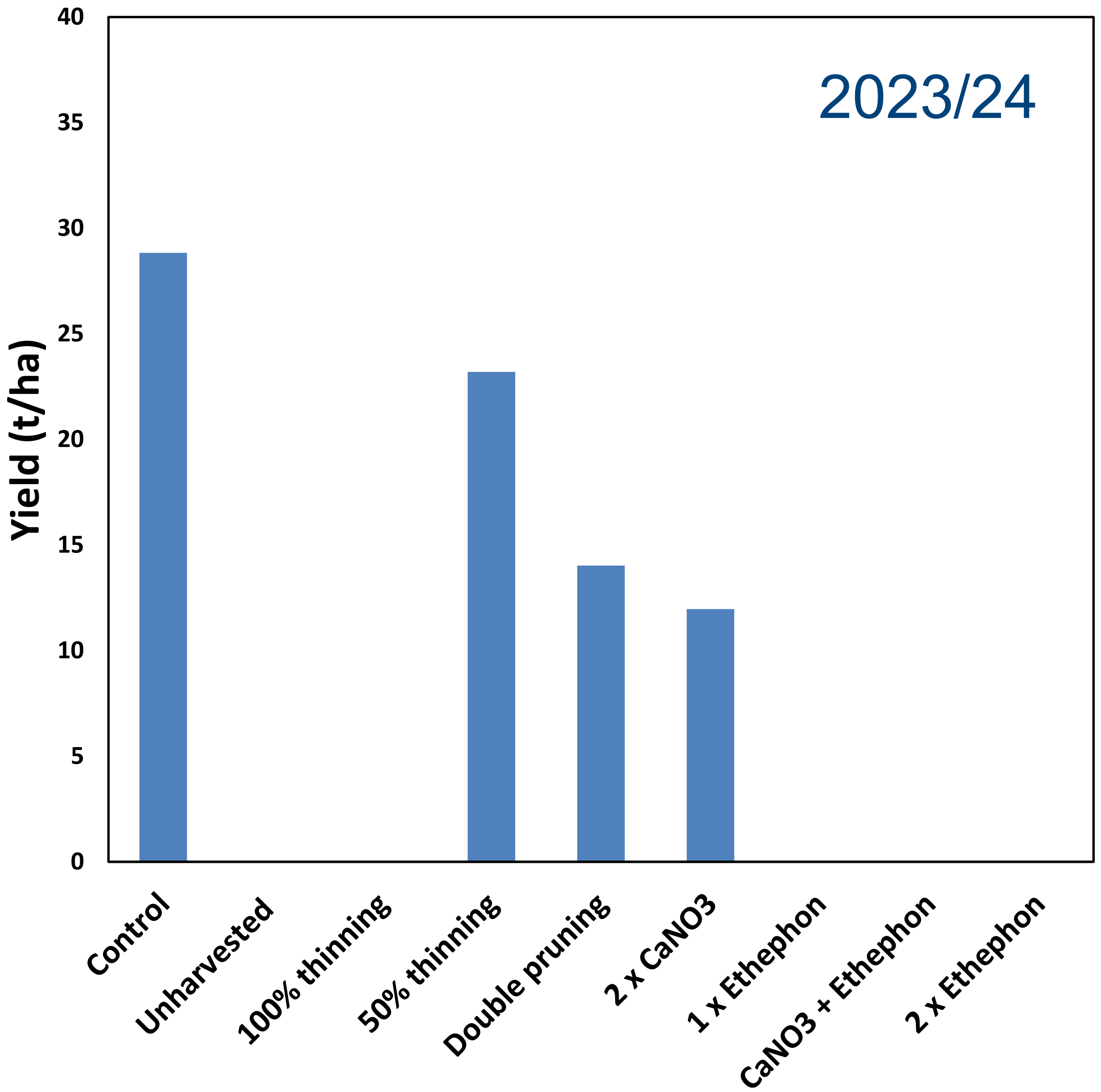
Yield


2022/23
Yield (t/ha)
0
5
10
15
20
25
30
35
40
Control
Unharvested
100% thinning
50% thinning
Double pruning
2 x CaNO3
1 x Ethephon
CaNO3 + Ethephon
2 x Ethephon


2023/24
Yield (t/ha)
0
5
10
15
20
25
30
35
40
Control
Unharvested
100% thinning
50% thinning
Double pruning
2 x CaNO3
1 x Ethephon
CaNO3 + Ethephon
2 x Ethephon

Yield

7th November

4th January

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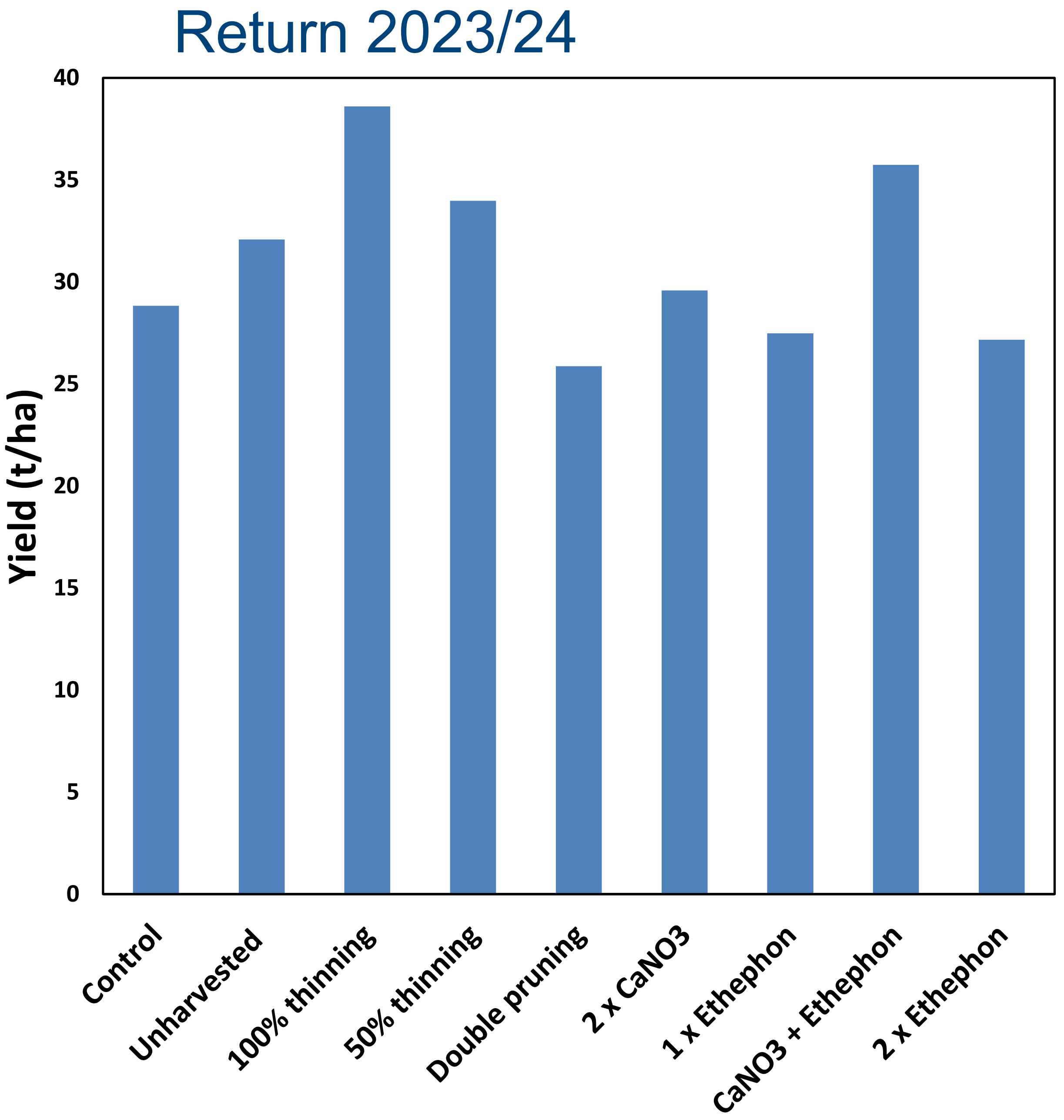
Yield


Return 2023/24
Yield (t/ha)
0
5
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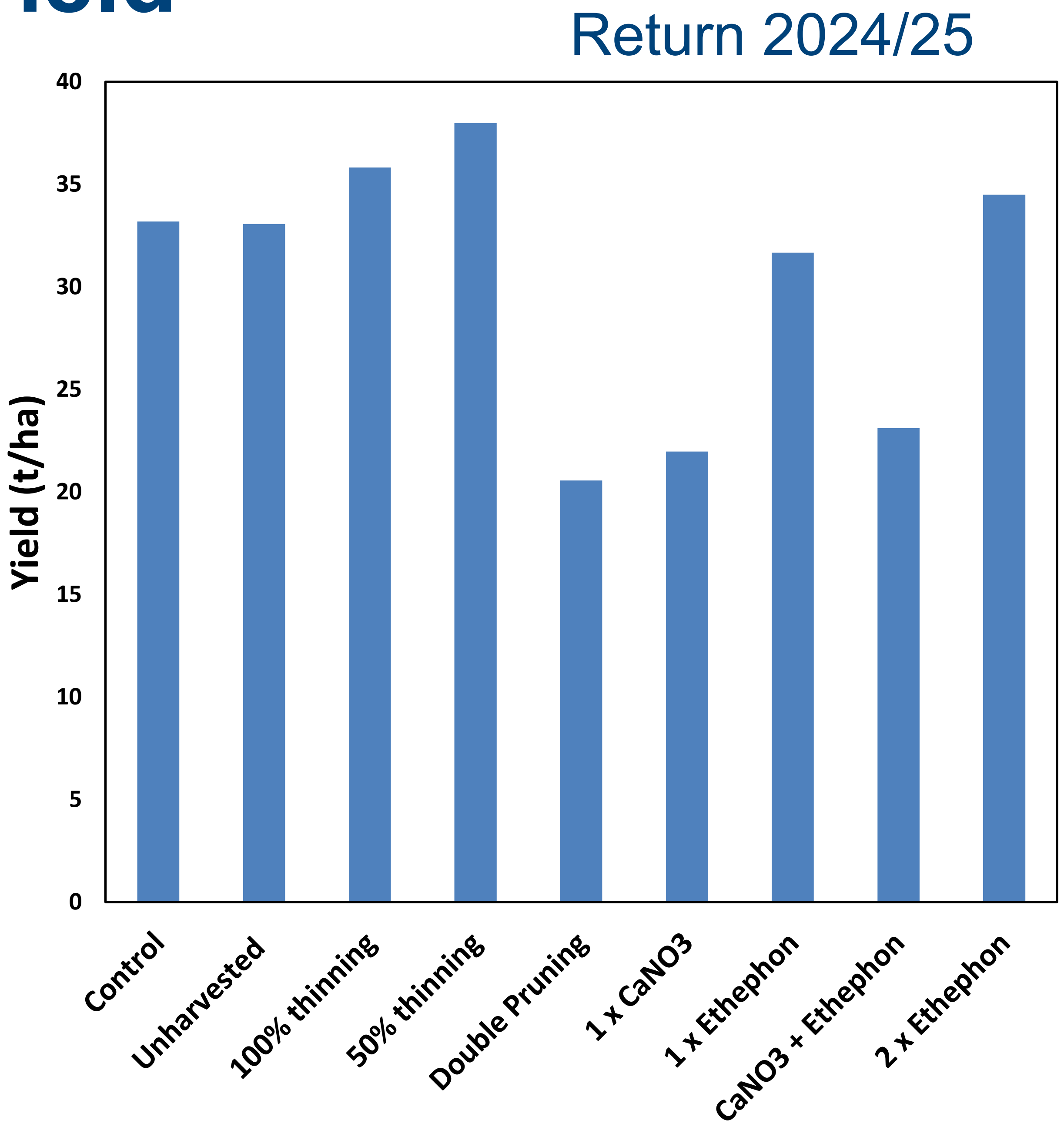
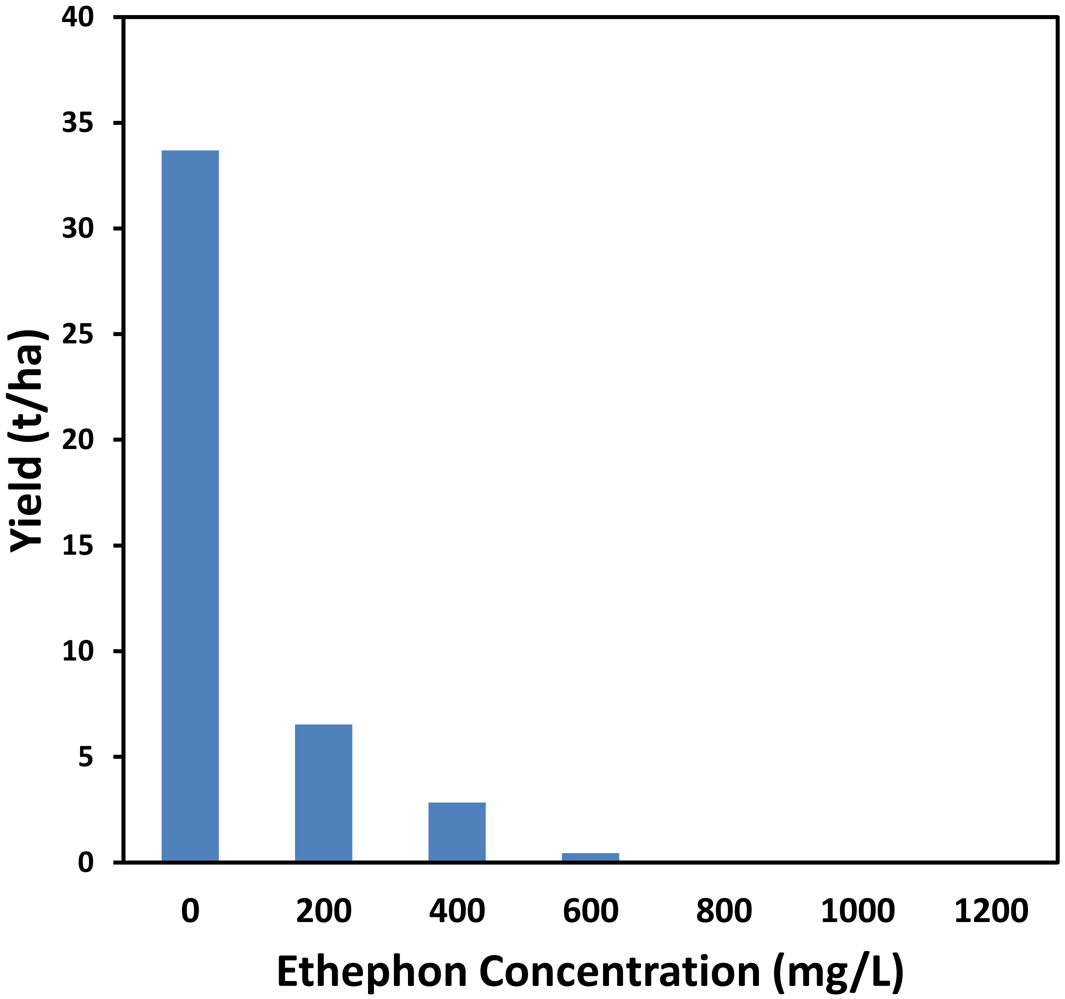

Return 2024/25
Yield (t/ha)
0
5
10
15
20
25
30
35
40
Control
Unharvested
100% thinning
50% thinning
Double Pruning
1 x CaNO3
1 x Ethephon
CaNO3 + Ethephon
2 x Ethephon

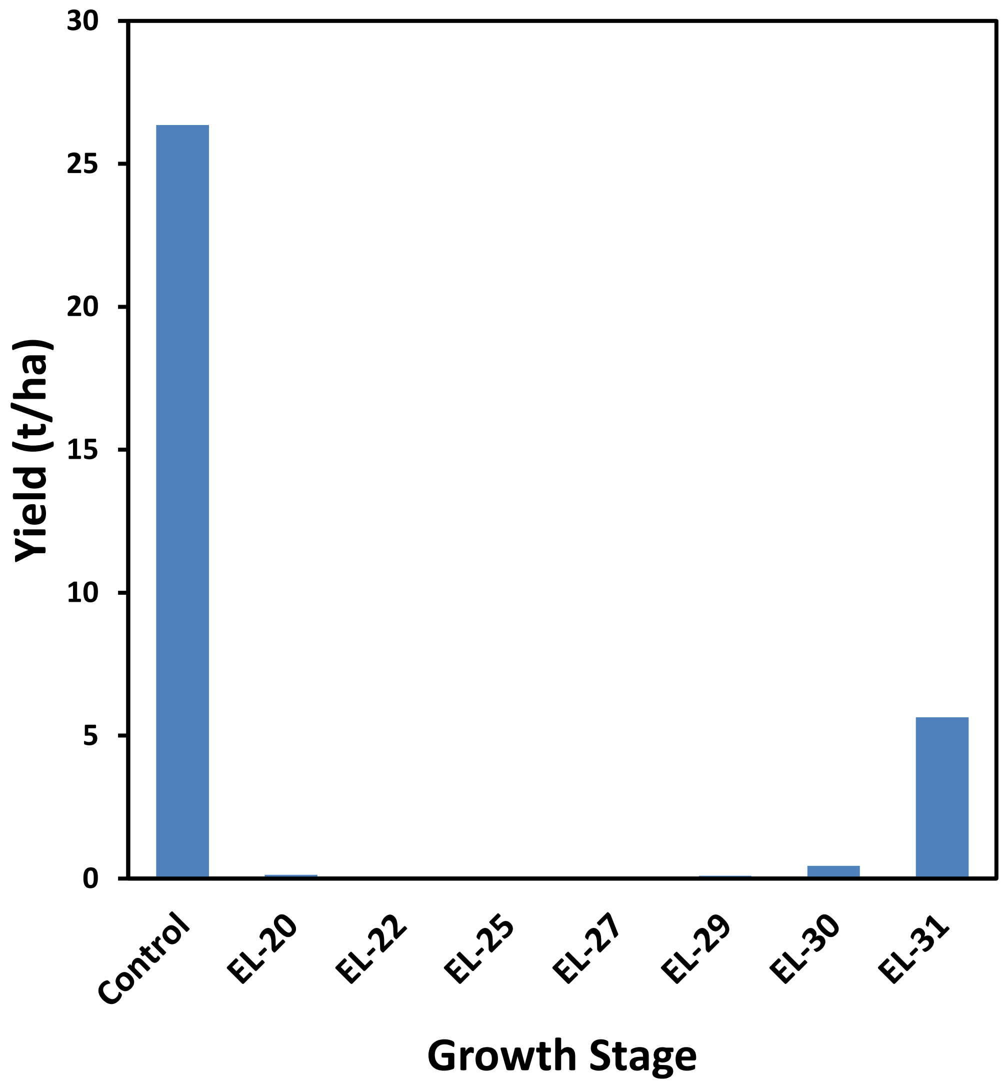
Ethephon Concentration

- Dose response applied at early fruit set (EL 27).
- Fully effective down to 800 mg/L.
- Could consider lower rates?
- Effectiveness is weather dependent.
- Need to confirm in subsequent seasons.



Timing of Ethephon Application

- Applied a twice weekly intervals.
- Larger window than I expected.
- More flexibility to combine with fungicides.



Resting vineyard

Three levels of irrigation

- Approx 7 ML/Ha
- Approx 3.5 ML/Ha
- Approx 2ML/Ha

Three crop levels

- 100%
- 50%
- 0%

Two years of treatment then normal irrigation (7 ML/Ha)

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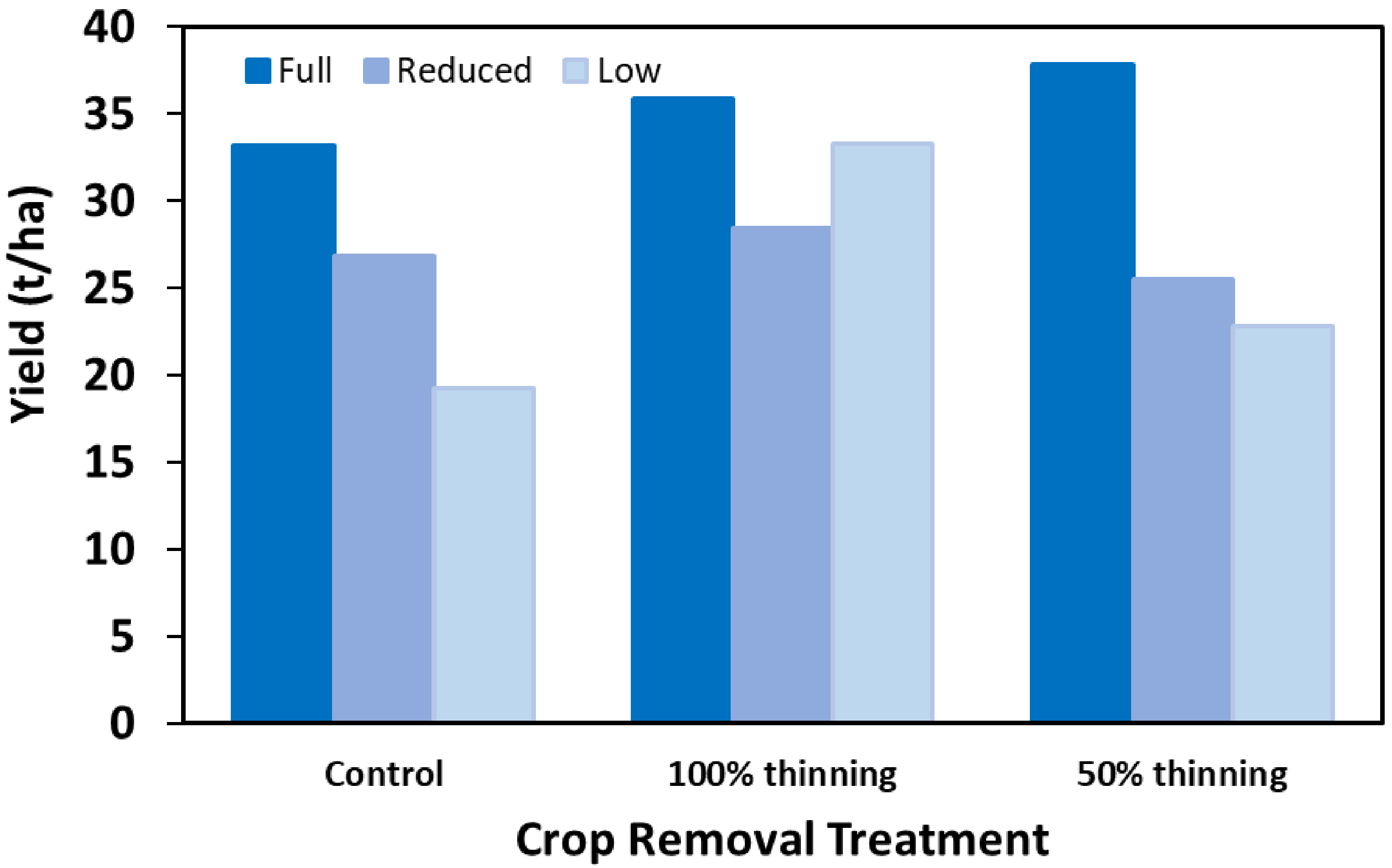
Irrigation and Crop Removal



Take care

- Concentrate spraying
- Compatibility and pH
- Temperature (greater than 17C but can be too hot)
- Bunch zone application
- Minor use permits
  - In place for Ethephon in 2025
  - Lapsed for Calcium Nitrate
- Residues

Ethephon costing

- Product only - application rate is 1g/L
- 20L of Promote Plus 900 is $312.50 ($15.63 per L)
- Concentration is 900 g/L Ethephon
- Full water rate 2000 L/ha (Riverland – whole canopy)
- 2220ml of active or $35 per Ha
- 2023 costing

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Acknowledgements

- Han Chow, Florent Briche, Habtamu Tura, Shahin Solgi, and Sarah Wing
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- Katie Dunn – formerly NSW DPI

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INDUSTRY INSIGHTS EVENT 2025

Q&A

WINE GRAPE COUNCIL SA

riverland wine

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Riverland Wine's Grape Succession Program Recipient

Ebony Petch

2025

Announcement

Thank you!

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