

One Grape & Wine Sector Plan

Resetting the path
to Vision 2050



One Grape & Wine Sector Plan 2024-2030



Our place and product

Australian Grape & Wine will:

- Advocate for assistance and policy development
- Support producers to adapt products and packaging

Wine Australia will:

- Provide data, information and tools to support the balancing of supply and demand
- Invest in co-designed innovation to align products with consumer and market demand

State & regional associations can:

- Facilitate regional collaboration on supply and demand
- Support regional innovation and product development
- Collaborate to share regional stories and experiences

Grape & wine producers can:

- Adopt sustainable and innovative vineyard practices
 - Align business and product plans to market trends and data
 - Respond to supply and demand imbalance
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Our markets

Australian Grape & Wine will:

- Improve market access for Australian wine producers
- Advocate for resources and support
- Facilitate collaborative action

Wine Australia will:

- Engage global markets
- Lead a customer-centric approach
- Improve international market access

State & regional associations can:

- Implement regional promotion initiatives
- Collaborate with local businesses

Grape & wine producers can:

- Diversify product offering
 - Brand building and storytelling
 - Tailor market strategies and participate
-



Our consumers, customers and community

Australian Grape & Wine will:

- Collaborate for information sharing
- Develop practical solutions
- Improve communication

Wine Australia will:

- Establish a cross-sector consumer insights advisory group
- Invest in and disseminate consumer-led insights

State & regional associations can:

- Engage local community
- Support the adoption of consumer-led innovation
- Support positive engagement in public health

Grape & wine producers can:

- Engage local communities
 - Leverage consumer insights
 - Support positive engagement in public health
-

Industry vision

Australian wine: enjoyed and respected globally
(*Vision 2050*)

Plan mission

Help reset the sector on the path to *Vision 2050*

Key sector challenges

- Profitability and the supply-demand imbalance
- Change in consumer demand and perceptions
- Sustainability requirements

Who will deliver on actions?

Every sector-focused organisation and grape and wine business has a role to play and responsibility. Collaboration, responsiveness, and innovation will be required by all.



Our sustainability

Australian Grape & Wine will:

- Support Sustainable Winegrowing Australia
- Communicate emissions reduction commitments
- Advocate for global harmonisation of sustainability frameworks

Wine Australia will:

- Provide a research and adoption program focused on sustainable outcomes and climate adaptive and mitigative practices and products
- Enhance data provision and auditing
- Promote sustainability and sustainable practices

State & regional associations can:

- Promote adoption of sustainable practices
- Promote regional sustainability initiatives
- Facilitate collaboration
- Advocate for policy support

Grape & wine producers can:

- Adopt sustainable practices
- Communicate sustainability commitments
- Reduce carbon emissions



Our people

Australian Grape & Wine will:

- Foster sector-wide collaboration
- Strengthen advocacy efforts
- Support career growth opportunities

Wine Australia will:

- Develop the leaders of tomorrow and skilled leaders of today
- Promote career pathways
- Evolve extension and adoption

State & regional associations can:

- Facilitate local skill development programs
- Promote networking and mentoring opportunities
- Advocate for regional resources and support

Grape & wine producers can:

- Support programs to make the sector a career of choice
- Invest in employee training and development



Our systems

Australian Grape & Wine will:

- Review infrastructure and investment opportunities
- Advocate for digital transformation

Wine Australia will:

- Unlock investment opportunities
- Support digital transformation
- Ensure access to information

State & regional associations can:

- Facilitate technology adoption
- Promote collaboration and information sharing

Grape & wine producers can:

- Invest in technology and data integration
- Streamline supply chain processes
- Enhance regulatory compliance measures

Foreword

In 2020, the sector undertook a comprehensive process to chart the path towards a profitable, productive, resilient and sustainable future by 2050. Those ambitions were reflected in the sector document, *Vision 2050*.

Since then, we've been subjected to ongoing challenges that have pushed the sector off course. Without a change of direction, achieving the goals of *Vision 2050* will be extremely difficult.

With pressures mounting and profitability declining, the sector demanded action and leadership.

Responding to calls from the sector for action, Wine Australia and Australian Grape & Wine set out to develop the *One Grape & Wine Sector Plan*.

The intent of the *One Grape & Wine Sector Plan* is to recalibrate according to current operating conditions, to unify the sector and get it back on the path towards the ambitions outlined in *Vision 2050*. Based on extensive consultations with all parts of the sector and value chain, the *One Grape & Wine Sector Plan* has been reshaped to incorporate feedback from its initial draft.

The *One Grape & Wine Sector Plan* builds on the long-term goals outlined in *Vision 2050*, ensuring we stay on track towards a future where Australian wine is enjoyed and respected globally.

New challenges that have emerged – such as global declining alcohol consumption, trade headwinds, and the ongoing impacts from COVID-19 – have also been factored into the Plan ensuring it is fit for purpose for the challenges we continue to face.

The plan outlines the actions to be taken by all players within the sector from now until 2030 that will support individual, business and sector success.

Success is not guaranteed. More than ever, success is dependent on a shared commitment to act by all, to collaborate and to forge a new path for the sector.



John Hart OAM
Chairman
Australian Grape & Wine



Dr. Michele Allan AO
Chair
Wine Australia

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Introduction

The *One Grape & Wine Sector Plan* lays out a set of priorities and actions to help the sector recover from recent challenges and reset the course for future resilience, getting us back on track towards *Vision 2050*.

Its objective is to help the sector take action to improve profitability and resilience by identifying the priorities areas where the sector has said it wants investment and collaboration to be made until 2030.

The *One Grape & Wine Sector Plan* is a collective effort. It aims to help align the plans across our organisations and find opportunities to collaborate across the sector. However, it is up to each organisation and individual grape and wine business to assess the Plan and set their individual targets to contribute to its goals.

Actions will be reviewed regularly until 2030.

An opportunity to reset direction

Our sector is no stranger to challenges, however the perfect storm we've encountered since 2020 is unprecedented.

Broad challenges the wine sector has experienced since 2020



The majority of these challenges have been outside of our sector's control and affect wine producers world-wide. However, it is acknowledged that past decisions, programs, actions and plans have exacerbated the consequences of these challenges for Australian grape and wine producers – particularly the most urgent challenge of oversupply. Through consultations, it is clear that while this has affected some regions more than others, it poses a significant challenge to our entire sector and to growers in particular.

Recovery and renewal will require a response from our entire sector – grape growers, winemakers, representative organisations, research institutions and others. We require bold leadership to chart a new path, as yesterday's solutions will not guarantee tomorrow's success.

The sector's vision

The sector's 2050 vision is: *Australian wine: enjoyed and respected globally.*

Guiding action towards this vision are five pillars of success.

1. Sustained growth in value to drive profitability.
2. An innovation culture driving excellence from grape to consumer.
3. Valued as an essential part of Australia's lifestyle and culture and a trusted custodian of the environment.
4. Australia's employment sector of choice.
5. A diverse sector unified by its pursuit of excellence.

This long-term vision and these pillars for success, remain the same. However, what is different now is the current state of play within the sector and the changes that have occurred since *Vision 2050* was developed.

What we heard from you

- A vision and action plan to reset the pathway to recovery.
- Highlight priorities for urgent action and collaboration among sector organisations.
- Insight into how Australian Grape & Wine and Wine Australia will implement and report progress.
- Guidance on actions businesses and organisations could take reset the pathway to recovery.
- Address the supply–demand imbalance strategically.
- Provide timely, high-quality data to make informed business decisions.
- Enhance the quality, value and image of our wine.
- Attract new people to the sector, and retain skills and talent.
- Align product innovation to meet consumer demand.
- Help us understand and manage ESG and sustainability.
- Improve the perception of Australian wine internationally and domestically.
- Underpin our sector's success with robust systems and processes.
- Support innovation, sustainability, and business profitability as key for long-term success.
- Acknowledge the increasing risks to the sector's social licence to operate, including those relating to ill-conceived policy responses relating to alcohol consumption.
- Ensure that digital transformation is combined with simplification of administrative processes.
- Demonstrate stronger, co-ordinated leadership from sector organisations.

Strategic themes and actions

To help reset the sector on the path to *Vision 2050*, the *One Grape & Wine Sector Plan* has six themes. These themes enable sector resilience, profitability and responsiveness, contribute to the vision, success pillars and goals of *Vision 2050*.



Our place
and product



Our consumers,
customers and
community



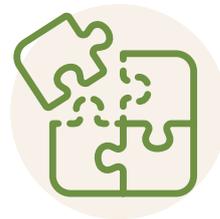
Our
markets



Our
sustainability



Our
people



Our
systems

Who will deliver on actions?

Every and grape and wine business and sector-focused organisation has a role to play and responsibility to take action to achieve the outcomes we collectively seek as a sector. Collaboration, responsiveness, and innovation will be required by all, demonstrating the mutual responsibility, leadership and collaboration required to move the dial.

To facilitate progress on the new path, Australian Grape & Wine and Wine Australia have worked through the actions they will deliver. Some actions have already commenced and others will be underway shortly.

Similarly, the Plan outlines what others in the sector can do to achieve the common goals.

This chart outlines the various roles and responsibilities of organisations and businesses within the sector. For example, Australian Grape & Wine is the representative body in the *Wine Australia Act 2013*, is a voluntary member-based organisation, funded by its members, and takes a clear lead in advocacy and sector coordination. Wine Australia is the statutory authority through the *Wine Australia Act*. Funded by the sector for the sector, Wine Australia is a collaboration between grapegrowers, winemakers, and the Australian Government to empower industry success by investing in research, innovation and adoption, developing and promoting market opportunities, and safeguarding industry reputation and product integrity. Wine Australia cannot represent industry or partake in advocacy.

Roles and actions

Organisation type	Wine Australia Act (2013)		Sector					Government	
	Wine Australia	Australian Grape & Wine	Regional associations	State associations	Other member organisations	Research institutions	Grape and wine businesses	Federal Government	State Governments
Roles and areas of potential action									
Sector consultation and strategy development	●	●	○	○				○	○
Sector coordination		●							
Advocacy		●	○	○	○		○		
Policy		○	○	○	○			●	●
Marketing	●		○	○	○		○	○	○
Market development	●							○	○
Trade and market access	●	●						●	○
Tourism (wine)	○		●	●	○		○	○	○
Market insights	●					○	○	○	○
Consumer insights	●					○	○		
Funds research and innovation	●							○	○
Conducts research and innovation						●			●
Facilitates extension and adoption of research	●		○	○	○	○			○
Adopt viticulture and wine practices							●		
Adopt product innovation	○					○	●		○
Biosecurity	○	○			○	○	○	●	○
Professional and leadership development	●	○	○	○	○	○	○		
Regulation/compliance	●								

● Lead organisation ○ Contributor

Urgent sector priorities

The *One Grape & Wine Sector Plan* consultations highlighted six urgent priorities.

These priorities and actions to the end of June 2025 are:

Priority	Objectives and deliverables	Roles	Dependencies	Goals
Balance supply and demand 	<p>Objective Determine the true demand position and future-proof Australia's production base.</p> <p>Deliverables</p> <ul style="list-style-type: none"> Assess current supply-base against sustainable market demand. Address imbalances through a combination of demand acceleration, adoption of innovation (production and product), and support for growers to transition into alternative crops or to gracefully exit the sector. Develop a framework for national vineyard register to provide insight into national vineyard supply. 	<ul style="list-style-type: none"> Market analysis, demand trends (Wine Australia) Supply assessment (Wine Australia) Strategic policy development and advocacy (Australian Grape & Wine) Develop framework for national vineyard register (Wine Australia) 	<ul style="list-style-type: none"> Funding – dependent on advocacy and applications for assistance from governments, or other sources. Demand modelling Vineyard register/data Sector support plan Demand growth initiatives 	<ul style="list-style-type: none"> Long term modelling: September 2024 Supply assessment: December 2024 Impact assessment and transition plan: March 2025 Framework for national vineyard register (June 2025)
Diversify and intensify our international markets 	<p>Objective Engage global markets to increase demand for Australian wine</p> <p>Deliverables</p> <ul style="list-style-type: none"> Understanding of consumer trends in key markets through targeted market research and retail sales data. Delivery of coordinated cross-sector initiatives to improve efficiency and effectiveness of promotional efforts. Product innovation research to support wine brands to harness market opportunities. 	<ul style="list-style-type: none"> Market analysis and consumer trends (Wine Australia) Market development strategy (Joint Marketing Committee) Activation calendar (Wine Australia and Australian Grape & Wine) Product innovation strategy, R&I and market access requirements for success (Wine Australia, Australian Grape & Wine, Joint Marketing Committee, Research Advisory Committee and Consumer Insights Advisory Group) 	<ul style="list-style-type: none"> Advocacy and grant applications for funding Market research data and insights Predictable levy funding stream to allow long-term planning. 	<ul style="list-style-type: none"> Key market consumer research: October 2024 Revised market development plan and cross-sector calendar delivered: December 2024 Product innovation strategy (June 2025)
Grow our domestic market 	<p>Objective Support wineries to grow opportunities in the domestic wine market.</p> <p>Deliverables</p> <ul style="list-style-type: none"> Understanding of key consumer trends and product innovation opportunities. Tailored domestic promotion strategy and tactics. 	<ul style="list-style-type: none"> Market analysis and consumer trends (Wine Australia) Develop and implement promotion initiatives, including tourism and cellar door activities, and collaborations with business (state and regional associations) Advocacy for fair and transparent arrangements for business dealings along the supply chain, including with retailers (Australian Grape & Wine). 	<ul style="list-style-type: none"> Advocacy for additional funding and grants. Market research data and insights Sector support and collaboration 	<ul style="list-style-type: none"> Key market consumer research: October 2024

Priority	Objectives and deliverables	Roles	Dependencies	Goals
<p>Embrace sustainability and aim for continuous improvement in practices</p> 	<p>Objective Improve access to Sustainable Winegrowing Australia</p> <p>Deliverables</p> <ul style="list-style-type: none"> • Simplified Sustainable Winegrowing Australia administrative processes for small wineries and grapegrowers. • Independently review Sustainable Winegrowing Australia certification to ensure it is fit for purpose for future market access requirements. • Communicate value of Sustainable Winegrowing Australia certification to the sector. 	<ul style="list-style-type: none"> • Market access, including domestic market, analysis for ESG requirements (Australian Grape & Wine and Wine Australia). • Review ESG requirements and align to different business sizes, with an administrative-light option for smaller producers (Australian Grape & Wine, AWRI, Wine Australia) • Coordinate independent governance review (Australian Grape & Wine and AWRI). • Develop sector engagement strategy (Australian Grape & Wine, Wine Australia and AWRI) 	<ul style="list-style-type: none"> • Availability of information on mid- to long-term ESG requirements for market access. • Applicability of sustainability standards to different business scenarios. • Funding to deliver activities of the sector engagement strategy. 	<ul style="list-style-type: none"> • Market access review: October 2024 • Governance review and program development: December 2024 • Sector engagement: February 2025
<p>Defend wine's social licence</p> 	<p>Objective Defend wine's social licence in public health debate with anti-alcohol lobby</p> <p>Deliverables</p> <ul style="list-style-type: none"> • Improved availability of evidence-based talking points for sector stakeholders, especially customer-facing (e.g. cellar doors, retail, hospitality). • Program of federal and state government engagement to promote targeted, evidence-based policy-settings that tackle instances of harmful alcohol consumption. • Rejuvenated cellar door responsible drinking messaging. 	<ul style="list-style-type: none"> • Research review and messaging (Australian Grape & Wine through Alcoholic Beverages Australia) • Cellar door collateral (Australian Grape & Wine with DrinkWise) • Government engagement (Australian Grape & Wine, State and Regional Associations) 	<ul style="list-style-type: none"> • Availability of peer-reviewed evidence • Funding for cellar door collateral • Availability of economic contribution analysis (including assessment of regional multiplier estimates) 	<ul style="list-style-type: none"> • Dissemination of talking point toolkit: October 2024 • Updated cellar door collateral created and distributed: November 2024 • Federal Government event delivery: February 2025
<p>Fit for purpose levy system</p> 	<p>Objective Ensure that the sector's national funding models are fit for purpose</p> <p>Deliverables</p> <ul style="list-style-type: none"> • Review of baseline funding requirements – what and how much does the sector need to deliver activities now and what will it need to have in place for future needs? • An assessment of potential alternative models that align with future needs. • Advocate for legislative change to support recommended changes to the Grape Research Levy, Winegrapes Levy and/or the Wine Export Charge. 	<ul style="list-style-type: none"> • Support and sector structure analysis (Australian Grape & Wine) • Alternative models development (Australian Grape & Wine and Wine Australia) • Policy advocacy (Australian Grape & Wine) 	<ul style="list-style-type: none"> • Supply analysis from 'Balance Supply and Demand' priority. • Support from the sector to progress change. • Working with government to get support to make the change. 	<ul style="list-style-type: none"> • Alternative model analysis and review: February 2025 • Future state modelling and recommendation: June 2025



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.



What we will do

Balance supply and demand

The oversupply of red wine and red winegrapes is the single most urgent challenge raised in consultations. It's evident that the sector requires urgent support in this area.

There is no single approach that can rebalance supply and demand in our sector. It isn't something that can be fixed by a single market, policy approach or innovation. Nor can it be resolved by any single organisation or the government. It requires collaborative efforts from all parties and will require focused advocacy and actions in the short term while working towards long-term solutions. There's a strong desire to align future production with market demand.

Improve our wine with innovation

Our sector offers a wide range of products to cater to various tastes. However, our sector needs to be adaptable and align production and quality with market demand as we face changing consumer preferences and competition from other products.

As a sector, we will aim to better integrate consumer preferences with vineyard techniques, winemaking techniques and innovations to produce wines that resonate with consumers. As a sector, we will strive to apply new technologies across the value chain to improve competitiveness, enhance product quality and improve production efficiency and sustainability. By seizing opportunities to enhance the quality of our products, we can strengthen our competitiveness in the market and attract customers from other alcohol beverage categories.

Strengthening regions to support businesses

Enhancing product quality and highlighting regional uniqueness emerged from the consultation as key goals for the sector. Our sector values the distinct characteristics of different regions. There's a shared commitment to ensuring that the connection between 'place and product' remains central to our growth strategy, emphasising quality, sustainability, diversity, and innovative practices.

Our regions and business models are diverse, but a unified presence brings value to all. As a sector, we want to foster stronger wine communities by supporting locally-driven solutions and collaboration that embraces our diversity and unity.

When this needs to happen

Priority theme for immediate action.

Who will do this and how

Australian Grape & Wine will:

1. Advocate for assistance and policy development

- Advocate for assistance to help businesses adapt or transition in response to supply-demand imbalances, while developing policy positions aimed at supporting sustainable infrastructure planning and removing market distortions.
- Advocate for benefits across the value chain, supporting growers and winemakers.
- Collaborate on policy development to address challenges in the sector, such as supply-demand imbalances.
- Advocate for policies that encourage strategic decision-making based on supply-demand dynamics.

2. Support producers to adapt products and packaging

- Advocate for policies that support innovation and adaptation in product development.
- Disseminate information to producers to adapt products and packaging based on evolving consumer preferences and market trends for various consumption occasions.
- Collaborate with stakeholders to identify emerging consumer trends and market opportunities.





Wine Australia will:

1. Provide data, information and tools to support the balancing of supply and demand

- Develop the framework for a national vineyard register to provide insight into the national vineyard 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 to plan a resilient future.

2. Invest in co-designed innovation to align products with consumer and market demand

- Invest in the development of innovative new products to compete in product categories with increasing consumer demand.
- Invest in the development of vineyard practices, winemaking techniques and innovations to produce wines that resonate with consumers.
- Explore new technologies along the value chain to improve quality and efficiency.
- Provide information, insights and innovation that supports the sector to align products, quality, and value with consumer and market demand.
- Support market intensification of existing markets and diversification to emerging markets for Australian wine, based on greater understanding of consumer and market appetite.
- Through the Regional Program, support regional associations to design local solutions for key challenges in viticulture, winemaking and business.



State and regional grape & wine associations can:

1. Facilitate regional collaboration on supply and demand

State and regional grape and wine associations can facilitate collaboration among local grape and wine producers to address the imbalance between supply and demand. By organising workshops, and information sessions, associations can encourage discussions on action and best practices for aligning production with market demand and fostering cooperation to manage regional supply challenges effectively.

2. Support regional innovation and product development

State and regional grape and wine associations can support innovation and product development initiatives that showcase the unique characteristics and strengths of their regions. By fostering innovation and creativity within their regions, associations can help differentiate local wines in the marketplace and attract consumers seeking authentic and distinctive wine experiences.

3. Collaborate to share regional stories and experiences

State and regional grape and wine associations can support the sector to tell stories of distinctive 'place and products' by collaborating in regional marketing opportunities in alignment with a cohesive national brand strategy. Further collaboration can be undertaken to develop other complementary plans to attract consumers to regions and regional wine offerings.



Grape and wine producers can:

1. Adopt sustainable and innovative vineyard practices

Grape and wine producers can prioritise the implementation of sustainable and innovative vineyard practices to protect their vineyards and enhance resilience against environmental and market-driven challenges.

2. Align business and product plans to market trends and data

Our traditional varieties and styles of wine will always have an important place. However, when developing new products and planning vineyard infrastructure, producers can leverage data, analysis and forecasts to respond to emerging trends or plan for future climatic change. By staying at the forefront of innovation, producers can adapt to evolving consumer preferences and market trends while maintaining their commitment to quality and excellence.

3. Respond to supply and demand imbalance

Grape and wine producers can make informed business decisions, respond to changing market signals for changing demand in variety, styles, volume and quality.

Producers can also ensure they are across all support available to them, such as ability to access the Australian Government's Rural Financial Counselling Service (RFCS).

Our markets



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



What we will do

Grow our share of the domestic market

The domestic wine market in Australia is important. There is a perception among wineries that there is increasing preference for imported wines at a time when wine consumption is in decline. However, data shows us that less than 20 per cent of the volume of wine consumed in Australia comes from overseas and this has not changed for the past decade.

As a sector, we will use data to better understand local trends that can drive product development and strategies by wineries, state and regional associations. We will also seek to partner with retailers, support increasing direct-to-consumer sales, develop regional partnerships, collaborate on local marketing campaigns, and capitalise on local events.

Diversify and intensify our international markets

More than 60 per cent of Australian wine is exported. Exports are key to the profitability and sustained growth of the sector.

As a sector, we aim to reach 160 million global wine consumers who do not currently consume Australian wine. Our approach will be comprehensive and tailored to address specific market needs, catering to premium and commercial segments. We will collectively focus on diversifying and intensifying our export markets, while developing products that meet trade and consumer demands.

Enhance the perception and consumer appeal of our wine

Rapidly changing consumer preferences provide opportunities to respond through product innovation and tailored activities. As a sector, we will work collaboratively to enhance the perception of our wines. In marketing activities, this will be through a cohesive national brand that unites the sector in promoting Australian wine, aligns key messaging and leverages regional initiatives that showcase the unique characteristics of each region and brands demonstrating the styles that define our wineries and telling their distinctive stories to trade and consumers.

Improve international market access

Regulatory complexities and the dynamic nature of global market dynamics present challenges to profitable sector growth.

We will work together to support our success in global markets. We will continue to establish mutually advantageous relationships in our export markets and ease technical and non-technical trade barriers.

When this needs to happen

Action on these areas will start immediately and be sustained until 2030.



Who will do this and how

Australian Grape & Wine will:

1. Improve market access for Australian wine producers

- Advocate for the removal or reduction of tariffs through robust engagement during trade agreement negotiations and enhance our advocacy efforts and policy positions to bolster our trade and market development endeavours.
- Identify and address non-tariff trade barriers to facilitate trade, working with Wine Australia and the Australian Government.

2. Advocate for resources and support

- Advocate for the development of policies that support the continuous gathering of data and insights from major retailers to understand domestic sales trends and consumer preferences.
- Advocate for policies that facilitate the development of compelling products and experiences based on customer insights to enhance consumer appeal and drive sales in the domestic market.
- Advocate for funding and resources to support market research initiatives, and research and development in the grape and wine sector.

3. Facilitate collaborative action

- Support wineries to grow opportunities in the domestic wine market through activities with the Joint Marketing Group and state and regional associations.
- Work with Wine Australia to develop a public-facing calendar of international activations to support participation.
- Work with state and regional wine associations to support cellar door activations and inbound tourism programs.
- Advocate for improved arrangements for commercial dealings along the value chain, including with retailers.

Wine Australia will:

1. Engage global markets

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

2. Lead a customer-centric approach

- Collaborate with the Joint Marketing Group to develop annual international marketing programs that embrace a customer-centric approach by better understanding and adapting to consumer preferences.
- Through the Consumer Insights Advisory Group, generate relevant and usable insights for the sector to enable better decision making on product development, market attractiveness, consumer wine drinking motivations and behaviours.

3. Improve international market access

- Provide information and insights to enable businesses to comply with international market regulations and make better export diversification decisions.
- 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 ensures a fair-trading environment for producers and exporters.

State and Regional Associations can:

1. Implement regional promotion initiatives

Develop and implement regional promotion and tourism initiatives to highlight the unique characteristics and qualities of wines produced within their respective regions. This could include organising wine festivals, tasting events, regional tours, cellar door activations, visitor guides or digital platforms that showcase local wineries, restaurants and attractions to drive economic benefits for local wineries and communities.

2. Collaborate with local businesses

Foster collaboration with local businesses and tourism organisations to promote regional wines and create synergies within the local community. This could include partnering with restaurants to feature local wines on their menus, collaborating with tourism boards to incorporate wine-related activities into tourism packages, and supporting local retailers to showcase regional wine offerings.

Grape and Wine producers can:

1. Diversify product offering

Diversify product portfolio to cater to evolving consumer preferences and market demands. This could involve experimenting with varietals, wine styles, lower or no alcohol products, and packaging formats to appeal to a wider range of consumers and enhance market competitiveness.

2. Brand building and storytelling

Differentiate products and establish strong connections with consumers through brand building and storytelling. This could involve communicating the unique characteristics, heritage, and values of their brands and vineyards through engaging narratives, storytelling initiatives, and experiential marketing activities to build brand loyalty and drive sales.

3. Tailor market strategies and participate

Use available consumer and market insights to build tailored strategies for markets. Participate in national branding activities to demonstrate the diversity of Australia's wine offering to trade and consumers. Building a stronger presence helps to challenge and enhance perceptions.



Our consumers, customers and community

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



What we will do

Respond to our customers and consumers

Understanding how consumer's tastes and habits are changing is paramount to our success.

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

As a sector, we'll strengthen our connections throughout the entire supply chain, both domestically and internationally, to gather customer and consumer insights to support innovation.

Advocate for our grape and wine community

The roles of sector bodies within the sector need to be communicated clearly and consistently to enhance understanding and collaboration. Each participant in our sector should be empowered to recognise their ability to contribute to achieving better outcomes.

Collectively, we will highlight the critical importance of grape and wine businesses to the Australian economy and the socio-economic prosperity of regional communities across Australia.

As a sector, we will regularly articulate the challenges and opportunities, to underpin effective advocacy on issues.

Defend wine's social licence in modern society

Despite the mounting pressure from anti-alcohol public-health bodies stridently encouraging governments to adopt restrictive, whole of population alcohol and health policies, wine holds a rightful place in a modern society, symbolising conviviality, and tradition.

However, this is not to suggest that alcohol consumption is without risk to people. As an industry, it is our responsibility to promote responsible consumption, collaborate with government bodies and sector peers to devise evidence-based strategies aimed at curbing harmful drinking behaviours. Collectively, we will strive to protect the cultural significance and integrity of our product while promoting moderation and balanced lifestyle among consumers.

When this needs to happen

Actions in this theme start now and are ongoing. Some will be immediately actioned and others require change along the value chain.

Who will do this and how

Australian Grape & Wine will:

1. Collaborate for information sharing

- Advocate for the sector to share social licence data, facilitating informed decision-making and guiding business strategies.
- Lead stakeholder engagement efforts to ensure the sector's collective voice is heard.
- Provide tools and resources for state and regional associations to mobilise with consistent advocacy messaging.

2. Develop practical solutions

- Strengthen advocacy efforts by informing policy and regulatory decision making through the provision of reputable and credible data to support targeted policy responses.
- Engaging proactively in national and international policy debates as they relate to alcohol and health issues, using data and analysis, and promoting targeted policy approaches to promote a reduction in harmful alcohol consumption.
- Highlight the importance of the wine sector to the Australian economy and regional communities with governments and the community.
- Rejuvenated cellar door responsible drinking messaging.

3. Improve communication

- Enhance communication channels across the sector to ensure clarity regarding roles and responsibilities of each sector body, enabling effective collaboration and advocacy efforts.
- Engage with stakeholders across the sector to develop practical solutions based on evidence and consultations, addressing issues affecting producers and communities.
- Engage with regulatory bodies to ensure compliance with competition laws and promote ethical business practices.

Wine Australia will:

1. Establish a cross-sector consumer insights advisory group

- Improve research, innovation and marketing efforts by involving key customers in the co-design process, gaining insights into needs throughout the product development and marketing cycle.
- Foster collaborative responses to consumer insights across the value chain

2. Invest in and disseminate consumer-led insights

- 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.

State and regional grape & wine associations can:

1. Engage local community

Enhance close ties within local communities by organising events, festivals, and educational programs that promote wine appreciation and highlight the cultural significance of wine regions. Collaborate with local businesses, tourism boards, and community organisations to showcase the unique attributes of each wine region and attract visitors.

2. Support the adoption of consumer-led innovation

Support grapegrowers and winemakers to align practices and products with consumer expectations by identifying how consumer insights and expectations are best applied at a regional level.

3. Support positive engagement in public health

Work with Australian Grape & Wine to provide members with resources that encourage customers to responsibly consume alcohol and call out harmful behaviours. Collaborate with Australian Grape & Wine on government and community engagement.

Grape and Wine producers can:

1. Engage local communities

Engage with local communities by hosting events such as vineyard tours, wine tastings, and educational workshops. These events can help build strong relationships with local residents and businesses while increasing awareness and appreciation for the wine sector.

Forge partnerships with local restaurants, hotels, and retailers to promote local wines and support the regional economy. Collaborative efforts could involve joint marketing campaigns, special events, or exclusive product offerings that showcase the unique qualities of the local wine sector. This collaboration not only benefits the businesses involved but also strengthens ties within the community.

2. Leverage consumer insights

Seek to align product innovation and promotion with consumer insights to draw customers away from our competitors.

3. Support positive engagement in public health

Support customers to responsibly consume alcohol and call out harmful behaviours. Provide a safe cellar door environment and follow the Alcoholic Beverages Advertising Code (ABAC) across customer communications.



Our sustainability

Sustainability is central to our sector's current and long-term resilience and profitability. Our sector aspires to be recognised as a global leader, it therefore needs to embed environmental, social, and governance (ESG) practices to enhance resilience, profitability, and sustainability.

What we will do

Future proof our supply base

Our climate will continue to change and present challenges in managing our vineyards. It's essential to build climate resilience through practices that protect our viticultural assets and work to enhance our 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 biosecurity are vital tasks that require careful attention. As a sector we will explore strategies to increase demand, improve flexibility in responding to climate change, and ensure the sustainability of our vineyards for the future.

Putting the sector's ESG and sustainability plans into action

Economic viability and business objectives are central to the sector's sustainability commitments.

The sector is proactively committed to sustainability and ESG and recognises the importance of ongoing action, reflected in Wine Australia's ESG Investment Plan and Emissions Reduction Roadmap.

Sustainability and ESG credentials are increasingly scrutinised. Collectively, we will continue to advocate for evidence-based policies, and commit to demonstrating our sustainability credentials and continuous improvement through programs including Sustainable Winegrowing Australia. Our goal is to establish a robust Sustainable Winegrowing Australia that meets the future needs of our sector and is flexible to support grape and wine businesses of all sizes.

Embrace sustainability and aim for continuous improvement in practices

Practical tools, systems, and processes need to be available to help the sector achieve its sustainability objectives. As a sector, we will strive to enhance sustainability, by applying practices and developing climate-adaptive solutions for both viticulture and winemaking. Collectively, we will take steps to reduce our environmental impact, including our carbon footprint, in line with Wine Australia's Emissions Reduction Roadmap for the sector and with national emissions reduction targets.

Promote sustainability responsibly in our marketing efforts

Consumer research indicates an increased importance of sustainability and ESG practices and values to global consumers. As a sector, we are committed to uphold the principles of sustainability and ESG, communicating them honestly and transparently to our customers. Sustainability and ESG considerations are integral to maintaining the integrity of our sector and will continue to guide our culture of accountability and ethical standards.

Take sustainability action for our communities

Our responsibilities extend beyond our vineyards and wineries to the communities where our products are consumed. The sector acknowledges our role as integral parts of these communities and actively seek opportunities to support social improvement initiatives.

There is growing importance of sustainability in shaping consumer and community perceptions, as well as minimising environmental impact. By taking action together, we can maintain the sector's social licence and improve principles of accountability, transparency, and ethical conduct.

When this needs to happen

Actions in this theme start now and are ongoing.

Who will do this and how

Australian Grape & Wine will:

1. Support Sustainable Winegrowing Australia

- Explore options for a modular Sustainable Winegrowing Australia (light) for small grape and wine producers who do not export.
- Distribute guidance, resources, and assistance to help producers adopt sustainable practices.
- Coordinate an independent review of Sustainable Winegrowing Australia.

2. Communicate emissions reduction commitments

- Advocate to government the sector's commitment to reducing emissions in line with the goals outlined in the Emissions Reduction Roadmap.
- Support emissions reduction actions, including the adoption of low-emissions packaging and transportation.

3. Advocate for global harmonisation of sustainability frameworks

- Advocate for harmonisation of sustainability frameworks across global markets to streamline processes, reduce duplication, and support a risk-based governance approach adaptable to businesses of all sizes.
- Collaborate with global stakeholders to develop consistent principles standards and guidelines for sustainable practices.

Wine Australia will:

1. Provide a research and adoption program focused on sustainable outcomes and climate adaptive and mitigative practices and products

- Support transition to practices that lower the sector's carbon emissions by 42 per cent as outlined in the Emissions Reduction Roadmap.
- Explore new practices and solutions to continue reducing emissions.
- Share progress, challenges, and achievements related to emission reduction efforts with the sector.
- Investigate sustainable usage of, or low-emissions alternatives to, vineyard and winery inputs.
- Improve water use efficiency.
- Develop solutions for waste circularity and sustainable packaging.
- Support research into new planting materials, including varieties, clones and rootstocks.
- Develop strategies and practices to improve soil health, biodiversity and landscape management that improve measurable ecological outcomes.
- Share strategic climate adaptation information from the Bureau of Meteorology and other key Australian research.
- Support proactive resilience measures.
- Provide practical tools and campaigns to support effective implementation of sustainable practices in diverse business scenarios.
- Through the Regional Program, support regional associations to design solutions for local challenges in viticulture, winemaking and business.

2. Enhance data provision and auditing

- 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.

3. Promote sustainability and sustainable practices

- Collaborate with other agriculture sectors and other grapegrowing and winemaking geographies to support recognition of sustainable practices
- Maintain the sector's accountability and transparency of practices through truthful marketing and communications
- Communicate our ESG commitments and credentials in a clear and consistent narrative across the value chain.
- Collaborate with Australian Grape & Wine and the Australian Wine Research Institute on a Sustainable Winegrowing Australia sector engagement strategy.

State and regional grape and wine associations can:

1. Promote adoption of sustainable practices

State and regional grape and wine associations can actively promote the uptake of Sustainable Winegrowing Australia accreditation among their member vineyards and wineries. Associations can also advocate for and support uptake of sustainable viticulture and winemaking practices among members, and help producers communicate their actions and commitments to consumers and communities.

2. Promote regional sustainability initiatives

Associations can spearhead sustainability initiatives tailored to the specific needs and characteristics of their regions. By championing sustainability at the regional level, associations can contribute to the long-term health and resilience of local vineyards and ecosystems.

3. Facilitate collaboration

Associations can serve as platforms for collaboration and information sharing on sustainability and ESG initiatives and commitments. Collaboration can happen within grape and wine businesses, across different regions or across allied local businesses. By fostering a collaborative environment, associations can facilitate collective action and accelerate the adoption of ESG and sustainable practices with their respective regions and across Australia.

4. Advocate for policy support

State and regional grape and wine associations can advocate for policy support at the local and regional levels to incentivise and facilitate the implementation of ESG and sustainable practices.



Grape and Wine producers can:

1. Adopt sustainable practices

Grape and wine producers can implement sustainable farming practices and production methods. Producers can become accredited with Sustainable Winegrowing Australia. By reducing environmental impact and promoting biodiversity, producers can enhance the sustainability of their operations.

2. Communicate sustainability commitments

Producers can clearly communicate their commitment to environmental stewardship, social responsibility, and governance integrity through labelling and marketing. By fostering trust and demonstrating accountability, producers can enhance their reputation and appeal among the trade as well as environmentally conscious consumers while contributing positively to the community and ecosystem.

3. Reduce carbon emissions

Producers can actively work towards reducing their carbon emissions in line with the Emissions Reduction Roadmap and sector goals and targets. By embracing emission reduction, producers can help reduce their impact on climate change and moving towards a net-zero emissions sector.



Our people

Our sector is a respectful and inclusive community and we need to foster diverse leadership, long-lasting careers, and provide the knowledge and skills for resilient businesses.



What we will do

Improve diversity and inclusion in the sector and in leadership

Together, we're going to support and boost talent across the sector. Our sector is committed to making sure everyone gets a fair shot and has opportunities, regardless of age, gender, cultural background, language, LGBTQIA+ identity, or disability. Collectively, we will actively encourage First Nations people to enter and stay in our sector. This will make us an even better sector for everyone to work in and will help build a more united and thriving grape and wine community.

Attract and retain skilled workers

A dynamic and forward-thinking wine sector is built on our ability to attract and retain talent. As a sector, we will attract a new generation workforce with a range of skills that are needed for both the unique requirements of viticulture and wine, but also in emerging technologies and in adapting to future needs. By improving the commercial conditions of our sector, we can make the grape and wine sector a more attractive careers sector.

Develop skilled and capable people

Together, we'll make sure everyone, all along the grape and wine value chain, gets the skills they need now and into the future. Our goal is to back our people as they learn and grow, providing access to upskilling and, importantly, mentoring to build on the solid know-how our people already have for future success.

Enable practice change

Everyone in our sector needs access to information, skills training and insights to make informed decisions. This will strengthen the competitiveness and resilience of our sector. As a sector, we will encourage best practice in our vineyards, wineries and along the value chain.

When this needs to happen

Actions in this theme start now and are ongoing, with continual efforts needed to ensure inclusivity and skill development within the sector.

Who will do this and how

Australian Grape & Wine will:

1. Foster sector-wide collaboration

- Collaborate with stakeholders across the value chain to develop and implement programs and policies that promote diversity, inclusion, and leadership.
- Lead Diversity, Equality and Inclusion in Wine (DEIW) efforts through the DEIW Charter and Action Plan implementation.
- Advocate for diversity and equality processes and procedures, particularly for small to medium-sized businesses.
- Mobilise regional associations to distribute tools and resources for sector-wide adoption.

2. Strengthen advocacy efforts

- Advocate to ensure awareness and consideration of the grape and wine sector's workforce requirements.
- Work with other agricultural sector bodies to attract more young people into the agricultural sector.

3. Support career growth opportunities

- Disseminate information about career growth opportunities and relevant programs to the sector, ensuring accessibility for individuals regardless of background.
- Support leadership and capability building programs.
- Advocate for funding for relevant programs supporting people across the value chain.

Wine Australia will:

1. Develop the leaders of tomorrow and skilled leaders of today

- Deliver regional and national mentor and leadership programs, such as Future Leaders and Next Crop, to ensure equal opportunities for skill development and career advancement.
- Maintain commitment to diversity in mentoring and leadership programs.

2. Promote career pathways

- Promote clear career pathways to the grape and wine sector as a career of choice among school and tertiary students.
- Work with school, vocational and higher education sectors, as well as Australian Government-funded initiatives addressing workforce and labour issues across agriculture, to attract more people into the sector.
- 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.

3. Evolve extension and adoption

- 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 winegrape growing, winemaking, exporting and running a wine business.
- Support activities to increase innovation and profitability in wine businesses.

State and regional grape and wine associations can:

1. Facilitate local skill development programs

State and regional grape and wine associations can organise and facilitate skill development programs tailored to the specific needs of their local grape and wine communities. These programs could include workshops, training sessions or educational seminars and could focus on marketing strategies and business management, or viticulture and winemaking techniques in consultation with the local Wine Australia Regional Program. They could be delivered through collaboration with other service bodies, research organisations or State Government programs.

2. Promote networking and mentoring opportunities

Associations can create opportunities for networking and mentoring within their communities. By connecting experienced professionals with newcomers and providing opportunities for mentorship, they can facilitate knowledge transfer, skill enhancement, and career advancement within the local grape and wine sector.

3. Advocate for regional resources and support

State and regional grape and wine associations can, at their government level, advocate for regional resources and support to enhance the competitiveness and resilience of local businesses.

Grape and wine producers can:

1. Support programs to make the sector a career of choice

Grape and wine producers can implement policies and practices that promote equal opportunities for employment, advancement, and professional development regardless of age, gender, cultural background, language, or disability. Creating a welcoming and inclusive workplace culture not only attracts top talent but also fosters innovation and creativity.

Producers can also prioritise the well-being and work-life balance of their employees by implementing policies and initiatives that promote mental and physical health. By prioritising employee well-being, producers can improve morale, productivity, and retention rates within their organisations.

2. Invest in employee training and development

Producers can prioritise the training and development of their employees to enhance their knowledge, skills, and capabilities. By investing in the professional development of their workforce, producers can cultivate a skilled and motivated team that drives innovation, quality, and competitiveness in the sector.



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.



What we will do

Optimise sector governance

The current industry structure is complex and unwieldy. Decisions to simplify the structure would be welcomed, but will take a lot of discussion and goodwill to agree on simplification. To maintain strong relationships, there needs to be clearly defined roles and responsibilities within our sector service bodies.

Fit for purpose levy system

Our sector has many diverse needs and the levy system around Australia should be fit for purpose to meet the most important of these needs. Currently, the system is complex, with multiple layers across the regional, state and national levels. Funding models from across the entire sector should be assessed, to ensure these are fit for purpose to support the delivery of activities now and to invest in what the sector will need in future.

Unlocking opportunities for investment

There will always be more we want to do for the sector than the resources available allow us to. Given the challenging economic environment, it's difficult to obtain additional funding from within our sector. Therefore, seeking external funding is crucial for delivery of initiatives.

Embrace digital, data and tech transformation

Digital, data, and technology are revolutionising our operations, spanning from the vineyard to the point of sale, elevating product standards today, while keeping an eye on the horizon for emerging technology. As a sector, we aim to build digital literacy and skills to increase our adoption of beneficial technologies such as drone technology, data analytics, and digital marketing tools to streamline processes.

Enable end-to-end data models

There has been a shift towards data-driven decision-making, with a greater reliance on analytics to comprehend consumer behaviour, optimise production processes, and forecast market trends. As a sector, we aim to improve the use of data to inform our businesses, and simplify reporting requirements while upholding robust standards and processes.

Ensure access to information

Information sharing needs to be streamlined throughout our sector, ensuring that our community knows where to find relevant data, resources, and information promptly to make informed business decisions to drive resilience, profitability and sustainability.

When this needs to happen

Actions in this theme start now and are ongoing.

Ensure product integrity and quality

Well-designed, fit for purpose regulatory settings – and compliance with these regulations – is crucial for the 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.

Our sector must work with government to ensure our regulatory settings are contemporary, business-enabling and backed by an evidence-base.

Who will do this and how

Australian Grape & Wine will:

1. Review infrastructure and investment opportunities

- Conduct a comprehensive review of the current levy system structure to identify opportunities to ensure a contemporary, fit for purpose system.
- Conduct a review of the sector's governance structure.
- Seek ways to attract additional external investment into the sector by exploring partnerships, grants, and co-investment opportunities.

2. Advocate for digital transformation

- Advocate for improved connectivity and collaborate on technological solutions to optimise and integrate systems across the value chain.

Wine Australia will:

1. Unlock investment opportunities

- 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.

2. Support digital transformation

- 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 within the sector.
- Collaborate with other agricultural sectors and governments in defining data standards, link systems along the value change and streamline processes to reduce reporting burden.
- Facilitate sharing of end-to-end supply chain data to build cohesion in our systems.
- Develop activities to support increased adoption of best practice technologies in vineyards and wineries.

3. Ensure access to information

- Provide timely updates and resources for grapegrowers, winemakers, and businesses, aiming to reduce duplication while maintaining effective communication.
- Ensure access to information on market regulatory requirements and changes to support products and processes to align with standards and facilitate market access.
- Improve capability and culture to build confidence in Australia's regulatory settings, manage risks and maintain safeguards while minimising regulatory burden, and leverage data and digital technology to support our sector.

State and regional associations can:

1. Facilitate technology adoption

Work with Wine Australia and its Regional Program Partners to deliver resources and programs to help members adopt and leverage state-of-the-art technologies, such as vineyard management software, data analytics tools. Associations can also partner with service bodies including Wine Communicators of Australia to promote digital marketing platforms.

2. Promote collaboration and information sharing

Share best practices, sector insights, and technological solutions to facilitate knowledge exchange and accelerating innovation across the sector.

Grape and Wine producers can:

1. Invest in technology and data integration

Use technologies to optimise vineyard and winery management practices, improving quality and efficiency. Continue developing digital literacy skills as new technologies are made available. Seek to integrate data and help improve sector reporting and traceability.

2. Streamline supply chain processes

Work with suppliers, distributors, and logistics partners to streamline supply chain processes, from grape harvesting to wine distribution, leveraging digital solutions and automated systems to minimise costs, reduce wastage, and improve traceability.

3. Enhance regulatory compliance measures

Develop systems and protocols to ensure compliance with regulatory requirements.

Monitoring and reporting



Action is critical if we are to achieve the goals set out in this Plan to reset the path for the sector towards sustained profitability.

The immediate priorities identified on pages 10 and 11 clearly outline the roles and responsibilities, dependencies and milestones required to deliver on these objectives.

Some priorities will require action by individual organisations or businesses, but most require a team effort – collaborating across the sector. We all have a responsibility to take action, co-create new solutions to the challenges that face us today, and tomorrow.

Governance

For the first three years, Australian Grape & Wine and Wine Australia have agreed to oversee the plan's governance by:

- engaging with stakeholders and convening annually to review actions and report progress
- establishing sector working groups for the highest priorities issues requiring collaboration, and
- reviewing the *One Grape & Wine Sector Plan* in collaboration with stakeholders after the third year.

Australian Grape & Wine and Wine Australia have committed to using the *One Grape & Wine Sector Plan* priorities and principles in their own planning, decisions and reporting, and encouraging stakeholders to do so as well. It will be in these plans – our Annual Operating Plans and Strategic Plans – that targets and milestones will be set by our Boards and stakeholders can monitor our own respective commitment and progress.

What action has already been taken?

Australian Grape & Wine

Australian Grape & Wine responded immediately to the *One Grape & Wine Sector Plan* consultation sessions held in 2023, developing the Pre-Budget Submission* based on what was heard. In 2024–25, advocacy to government is focused on a \$86 million recovery and resilience program for a sector facing undue hardship.

This included:

- \$30 million sustainability support package for vineyard owners
- \$36 million on an export market driven recovery
- \$20 million in a domestic marketing campaign to drive food and wine tourism in Australia, and
- An additional \$10 million to retain and extend the Wine Tourism and Cellar Door Grant scheme on an ongoing basis.

Over the 18 months to the end of 2025, Australian Grape & Wine has also made a commitment to continuing advocacy in trade and market access (including reducing barriers to trade, delivering Free Trade Agreements that benefit wine producers and pursuing strong outcomes for wine) and advocacy to defend wine as a legitimate, artisan product accepted in a modern society to counter the anti-alcohol lobby and its increasing influence over public health policy.

<https://www.agw.org.au/policy-and-issues/submissions/>



Our place and product



Our markets

Wine Australia

Following the *One Grape & Wine Sector Plan* consultations, Wine Australia prepared urgent priority projects and investments around the key themes and actions to commence in 2024–25. These include:

- Start the national vineyard register framework to provide further insight into the sector's national grape supply
- An economic study on options for reducing oversupply and to move the sector toward a sustainable supply–demand balance
- Work supporting innovative wine production, such as mid-strength, that leverages technical knowledge and consumer insights
- Tailored approaches for each key export market and delivery of insights to the sector
- Collaboration to leverage collective marketing and market access resources and expertise
- A cross-sector Consumer Insights Advisory Group to act as a vehicle for research prioritisation and information dissemination
- Enhance vineyard post recycling programs
- Explore vineyard carbon insetting and winery CO₂ capture
- Resources to help the sector meet carbon reduction targets in the Emissions Reduction Roadmap
- A scoping study on gender equality issues to lay the foundation for future initiatives, and
- Promotion of career pathways to the sector.

These activities and more are detailed in Wine Australia's Annual Operational Plan 2024–25. Longer-term strategies and actions will be detailed in Wine Australia's Strategic Plan 2025–30. This strategic plan, guided by the *One Grape & Wine Sector Plan*, will come into effect on 1 July 2025 and will outline targets and key performance indicators for investments until 2030.

<https://www.wineaustralia.com/about-us/strategy-and-planning>



Our place and product



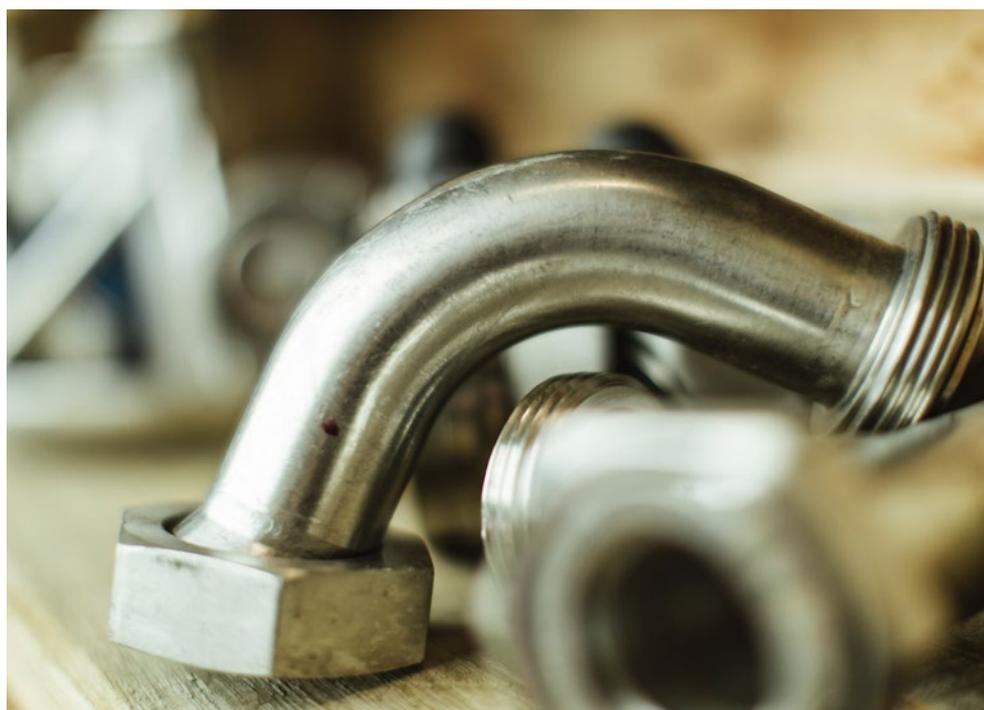
Our markets



Our sustainability



Our people





Viticulture and wine sector working group

In March 2024, Australia's Commonwealth, state, and territory agriculture ministers announced a viticulture and wine sector working group to urgently address oversupply and support grapegrowers and wine businesses in making decisions. The group comprises representatives of the Commonwealth, state and territory governments, Wine Australia, Australian Grape & Wine and other relevant groups.

The *One Grape & Wine Sector Plan* consultation has informed the working group, with additional meetings held in regions most impacted by the oversupply. The working group will also propose to Agriculture Ministers actions to support improvement in the grape and wine sector and its long-term viability by July and work in tandem with the priorities and themes identified in the *One Grape & Wine Sector Plan*.

Ahead of the July launch, Minister for Agriculture, Fisheries and Forestry Senator the Hon Murray Watt announced the \$3.5 million Grape and Wine Sector Long-term Viability Support Package to deliver:

- A national vineyard register.
- Trade and market development activities in established and key emerging markets.
- Domestic promotion of Australian wine through collaboration and education.
- Collaborative research to provide information and tools to growers to diversify crops and adopt niche markets.
- Greater insights to meet consumer demand for lighter alcohol products.
- An analysis of options to improve fair trading, competitive relationships, and contracting practices.

Consultation for the Plan

In developing the *One Grape & Wine Sector Plan*, Australian Grape & Wine and Wine Australia worked closely with the state and regional associations from around Australia to consult with people from across our value chain from July to September 2023. This encompassed:

- 1 national survey
- 17 workshops
- 42 interviews

The workshops were conducted in partnership with state and regional associations, and with the Research Advisory Committee, were run in every state except Queensland (who provided written submissions) and in several regional areas including the inland wine regions. A briefing was also provided to the Wine Industry Suppliers Association (WISA). These workshops were attended by large and small wine businesses, grape growers, researchers, representative bodies, suppliers and government representatives.

Have your say

In January 2024, a draft *One Grape & Wine Sector Plan* was released for comment. Responses to a survey as well as direct submissions were received, with feedback incorporated into this final version of the Plan.

What we heard about the draft

- A vision and action plan to reset the pathway to recovery.
- Demonstrate stronger leadership from sector organisations.
- Insight into how Australian Grape & Wine and Wine Australia will implement and report progress against the Plan.
- Guidance on actions businesses and organisations could take reset the pathway to recovery.
- The need to highlight priorities for urgent action and collaboration among sector organisations.
- Actions for profitable growth, focusing on quality and consumer preferences
- Address oversupply, poor-quality production, and global market perceptions of Australian wine.
- Integrate proactive measures to demonstrate the positive outcomes of responsible wine consumption
- Support innovation, sustainability, and business profitability as key for long-term success.
- Recognise the need to assess of the sector's financial and governance structures.
- Ensure that digital transformation is combined with simplification of administrative processes

Acknowledgements

The *One Grape & Wine Sector Plan* would not exist without the input from the sector – this Plan is for the sector, by the sector.

ACIL Allen, Australian Grape & Wine and Wine Australia acknowledge all those who contributed towards the *One Grape & Wine Sector Plan* and ensured their voice was heard, either by participating in the survey, attending a workshop, or contributing a written submission.

A special thank you to all those who hosted and arranged consultation workshops:

- Australian Commercial Wine Producers
- Australian Grape & Wine's Research Advisory Committee
- Great Southern Wine Producers Association
- Hunter Valley Wine and Tourism Association
- Inland Wine Regions Alliance
- Margaret River Wine Association
- McLaren Vale Grape Wine and Tourism Association
- Mudgee Wine Association
- Murray Valley Grapegrowers Association
- NSW Wine
- Orange Region Vignerons Association
- Riverina Winegrape Growers
- Riverland Wine
- South Australian Wine Industry Association
- Wines of WA
- Wine Tasmania
- Wine Victoria



