

A wide-angle aerial photograph of a river valley. The foreground is dominated by a dense, lush green forest. In the middle ground, a wide, calm river flows through the landscape. The background shows a flat expanse of land with some distant structures and a clear blue sky filled with scattered white clouds.

THE RIVERLAND WINE INDUSTRY BLUEPRINT

Acknowledgement of Country

We acknowledge and respect the First Peoples of the River Murray and Mallee as the Traditional Owners of the lands and waters of the Riverland. We pay our respects to their Elders past and present and extend that respect to other Aboriginal and Torres Strait Islander people who live in and visit this beautiful region.

This document was prepared by the Riverland Wine Industry Blueprint Steering Committee

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MESSAGE FROM THE MINISTER

The Riverland, nestled alongside the grand River Murray, is the engine room of the Australian wine industry. Its breathtaking natural beauty and deep agricultural heritage have made it a fertile ground for generations of dedicated growers. The region has long produced some of Australia's most affordable yet exceptional wines. As far as the eye can see, vineyards thrive in harmony with the ebb and flow of the river, making the Riverland the pulsating heart of the wine industry.

The Riverland Wine Industry Blueprint is a testament to the enduring value of the wine sector to the region's identity. While the industry currently grapples with a global surplus, especially of commercial red wine, it is imperative that we chart a path towards a more sustainable future. This Blueprint is the result of collective wisdom, drawing on the contributions of regional and industry stakeholders, along with the support of the South Australian Government, contributes to the vision of a bright future for wine production in the Riverland.

The Blueprint underscores the urgency of shifting to more sustainable production levels, striking a balance between grape supply and demand. It's not just an economic concern; it's about preserving this region's vital assets. As research indicates, many growers are considering leaving the industry, highlighting the need for social and well-being support for our community. Those who choose to stay must adapt and innovate, focusing on quality, environmental sustainability, and market trends. Data-driven decision-making, market insights, and transparency will be essential in bridging the gap between growers and wineries.

A strong regional identity is paramount, emphasising quality and sustainability in the global wine trade. We must craft industry-wide marketing narratives that showcase our environmental, social, and governance credentials, fostering an inclusive Riverland wine culture.

Leadership and collaboration will be key to sustaining the wine industry. High governance standards, wise investment, and engaging the younger generation are essential. For a thriving Riverland wine industry, businesses must focus on sustainability, and the development of new wine brands. Supporting local businesses and enhancing marketing capabilities will attract wine tourism and command higher prices for our wines.

This Blueprint is our roadmap to safeguard the Riverland's economic vitality and cultural identity for generations to come. With unwavering dedication and collaborative efforts, the Riverland wine industry can evolve, innovate, and adapt to ensure a prosperous, sustainable future.

Hon. Clare Scriven MLC
Minister for Primary Industries and Regional Development



MESSAGE FROM THE INDEPENDENT CHAIR, RIVERLAND WINE

The development of this Blueprint has come at a challenging time for the Australian wine sector following the loss of the Chinese export market, ongoing issues post the Covid pandemic and changing consumer preferences. It is a time when red wines in particular are in global surplus, including in Australia.

This Blueprint therefore has to straddle being relevant during a very difficult and historic down cycle for the Riverland wine region in the short-term; but it must also look to what the future of the wine region can be and identify a pathway towards this future. As you read the document you will see the tension between the challenges of the present and next couple of years and the ambition of the region in longer term.

The second tension in this Blueprint is the very nature of the regions production models. We produce the styles of wines consumed by most wine drinkers globally for enjoyment without necessarily being engaged in wine as part of their lifestyle. We also produce more expensive premium wines with appeal to consumers who are more wine engaged. These wines are crafted in various styles, with the region having no 'signature' style of wine, rather a multiplicity.

The current down cycle in the sector is already transforming the region as grape producers leave the wine sector for other crops or retirement, deliberately minimise their production, or undertake vineyard modernisation and transition projects. Many wine producers need less wine in the short term and are selling red wines at low prices to generate cashflow.

As we go through this difficult process, the Blueprint identifies how we cushion the negative impacts on people, businesses, regional water rights and the long-term opportunities that the region's wine sector will have.

This Blueprint envisages a smaller grape growing base and a difficult period of transition back into balanced stock levels. But it also envisages a vibrant, thriving wine region that consists of both high-volume production and premium production. It envisages a period working together with like-minded government and industry bodies to cushion the impacts of the current sector conditions whilst we build towards a region that produces great wine and tourism experiences, is highly adaptive and agile in delivering products that meet changing market needs.

We envisage a region that makes wine grape products that are on-trend and in demand because we will be more attuned to international market needs. We will have more capability and capacity to experiment with grape varieties, wine styles, packaging formats, and tourism experiences.

This document represents the north star for the Riverland wine region during a transitional period. Its purpose is to align Riverland Wine and the Riverland region with its partners in government and industry to collaboratively fund and action the Implementation Plan.

I would like to acknowledge the partnership with Primary Industries and Regions South Australia (PIRSA), Wine Australia and the Wine Grape Council of South Australia who all generously co-funded this process with Riverland Wine.

Dr Darren Oemcke
Independent Chair, Riverland Wine

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The Riverland is Australia's largest wine region by tonnage and home to some of the best and most innovative wine producers in the country.

With about 2.1 million bottles of Riverland-produced grapes enjoyed at dinner tables, functions and BBQs around the world every day, the wine industry is a major economic driver for the region and worth around \$400 million to the broader Australian economy.

The region produces highly successful wines that are consumed in over 70 countries, from both commercial and boutique operators. The Riverland is a beautiful river-centric tourism region with an emerging wine tourism sector and growing number of small wine producers producing Riverland geographic indicator (GI) wines both locally and in other Australian regions.

The Riverland's opportunities are: to continue to produce commercial wines that meet global palate expectations of good quality at highly competitive prices; to increasingly meet emerging global fashions and trends in wine styles in a timely way; to build its cohort of emerging small producers making wines from many varietals and in a wide range of styles; and to build its wine tourism opportunity to fulfill its potential.

However, it also must deal with short-term challenges. Until recently, both production and exports were growing year on year, due to low prices of irrigation water, a favourable exchange rate and the rapid growth of China's wine market. Since 2020 however, market factors have reduced demand for commercial red grapes from Australia, significantly impacting on the region.

Health-conscious consumers are reducing their consumption of alcohol and when they do drink, they are choosing more expensive options or alternative beverages. Lighter wine varietals and low or no alcohol wines are increasingly sought after and the quality expectations of commercial wines continue to increase. Spirits and beer have moved faster to satisfy new demands of consumers than the wine sector.

Whilst demand for imported wine has never been higher, overall global supply and demand for wine remains out of balance. Australian inventory levels of red wine are now higher than at any time in the past 15 years and Australian commercial red wines (less than \$5 per litre free



on board) are now being displaced by commercial grade red wines from cooler temperate regions (KPMG Wine Industry Insights, Aug 2023).

The impacts of climate change and escalating electricity, labour and fuel prices are increasing production costs. Market shocks including the loss of market access to China, the COVID pandemic and increased freight costs have disrupted supply chains, challenging the industry's sustainability.

A recent survey of Riverland grape growers indicated that most do not believe operating a profitable grape growing business is within their control, with at least 20% wanting to leave the industry over the next few years. Many have a negative view of the long-term viability of the industry and see no signs of future improvement. A reduction in the number of grape growers will help with the oversupply issue, but social impacts and increased environmental and biosecurity risks will be felt throughout the Riverland.

All these factors mean that, as an industry, we need to undergo a period of concerted transition and to adapt the production model of the Riverland to better meet customer expectations and continue being Australia's wine production powerhouse.

This Blueprint sets out five strategic priorities for improving the Riverland wine industry's competitiveness and restoring our long term viability.

The Summary of Priorities

Priority One

A rapid transition to more sustainable production levels

- 🍷 Significantly rebalance the production of red grapes and wine to match supply with demand.
- 🍷 Minimise any environmental or biosecurity hazards through changes in land use.
- 🍷 Maintain and secure productive land, irrigation assets and irrigation water entitlements in the region while the sector adjusts to more sustainable levels.
- 🍷 Support the transition of producers into different grape production models and varieties and into other crops that have market opportunity.



Priority Two

Become more adaptable to changing consumer and market trends

- 🍷 Position the Riverland as a region that efficiently produces wine grapes in every price band and rapidly develops new products, varieties and styles to meet market trends.
- 🍷 Adapt grape and wine styles, vineyard management practices and processing operations to better match market demand, while meeting the sustainable credentials expected by consumers today and in the future.
- 🍷 Ensure the whole region has easy access to information about market and consumer trends, emerging styles and opportunities so that the region is fastest to market on emerging opportunities and informed risk-taking is possible for all scales of grape and wine producers.

Priority Three

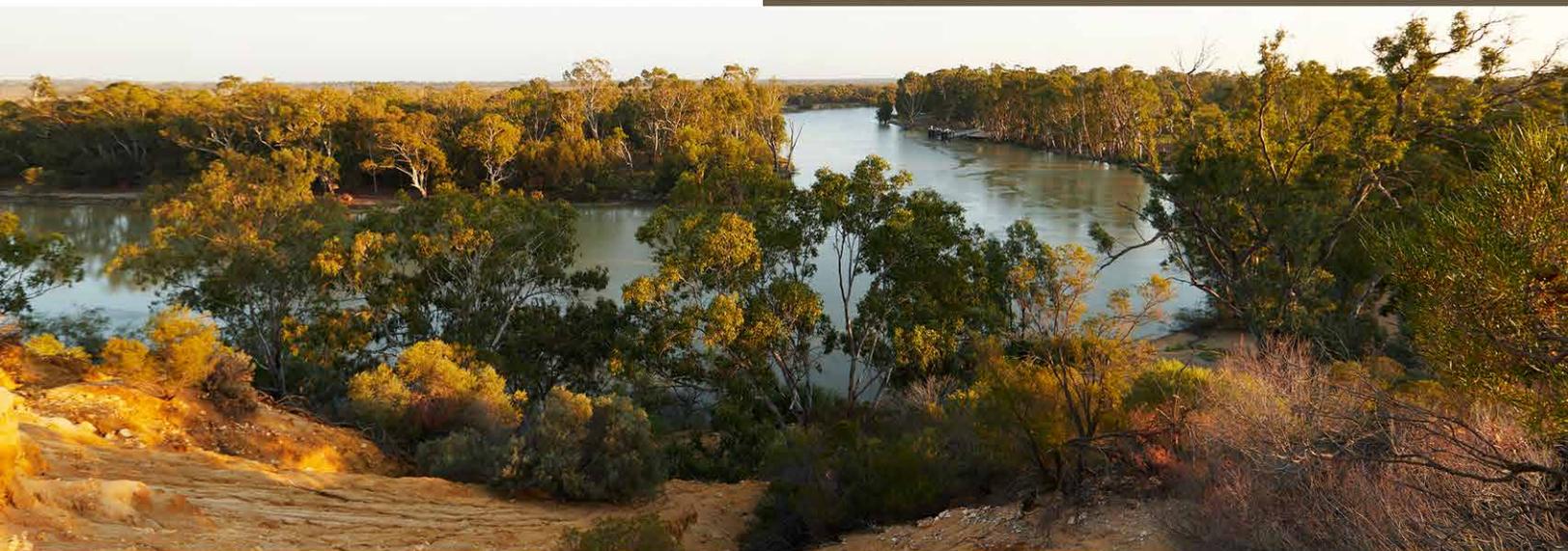
Develop and promote a stronger regional identity

-  Ensure domestic, international and trade customers are aware of the Riverland wine region and have positive associations with it.
-  Tell Riverland stories that evoke the history, stories and styles of the region and demonstrate our sustainability actions.
-  Strengthen our unique and inclusive Riverland wine culture with action on diversity and a culture of open communication in the region.

Priority Four

Develop passionate leaders and a skilled workforce

-  Support our industry leaders in developing an inclusive and unique Riverland wine culture that embraces our cultural diversity.
-  Attract and retain younger people in the region to build the capability of the local workforce.
-  Ensure industry funds are invested in priority areas including attracting and educating new participants.



Priority Five

Support agile wine businesses that are sustainable and profitable.

-  Support more Riverland wineries and growers to achieve higher price points and develop new and sustainable wine brands.
-  Increase the number of wine producers based in the Riverland and other regions using the Riverland GI.
-  Realise the significant wine tourism opportunity to grow the market for higher value wine grape products by increasing the number of operators and their capability.
-  Improve sustainable wine growing and wine making practices by accelerating the uptake of Sustainable Winegrowing Australia (SWA) accreditation.

About the Riverland

The Riverland is home to some of Australia's most exciting and innovative wine production, from both large and small producers and from over 100 grape varieties and areas of old vines. It is the birthplace of the bag-in-box, which is being reinvented around the world as a premium wine package, a significant producer of keg wine, a major producer of low and no alcohol wines and home of the first major brand in Australia to commit to recycled PET packaging.

We are Australia's largest wine region by volume produced and by area and second only to the Barossa Valley in terms of value of winegrape crush, producing 31% of Australia's grapes and 14% of Australia's crush by value. 77% of the grapes grown in the Riverland are converted into wine within the region, with 23% processed elsewhere. The region's major processors bring in grapes from around Australia to produce wines packaged under the South-eastern Australia GI and the South Australian GI.





ABOUT THE RIVERLAND

With our incredibly forgiving growing conditions and our largely dry weather reducing the incidence of pest and disease, we can commit to a greater level of organic production, can use lower management intervention to control disease and we are phylloxera-free.

We also have Australia's largest wine processing facility in Berri, making the region the country's largest producer of unpackaged wine. This goes on to be bottled or bagged-in-box in market in Europe, North America and Asia, producing some of the lowest carbon footprint wines on the planet.

The Riverland is home to about 20 premium producers who are taking on the world proudly identifying the Riverland as their production region, with the region's innovative and diverse nature symbolised in the range of styles produced. These wines are often made in the Riverland, but also outside the region by producers identifying the grape source as from the Riverland GI. The styles of wines include conventional styles of premium wines, natural and Pet Nat, 100% organic ranges, old vine wines and a range of fascinating varietals and blends.

A PERIOD OF GLOBAL CHANGE

The world wine trade is changing quickly as consumers drive a boom in consumption of imported wines. Consumers in traditional western markets are changing their wine preferences and wine consumption patterns significantly.

The massive disruptions caused by the dual trade crises of COVID and China increasing tariffs has effectively closed that market to Australian wine. These effects are still being felt in the Australian wine sector.



The Opportunity



Mission

To build an adaptive and resilient wine region with the capacity and strength of identity to create sales and tourism opportunities and to align industry bodies and government behind those opportunities.

To improve returns to processors and grape growers by reducing grape oversupply while producing commercial grape and wine products that are in demand at higher price points.

Vision

The Riverland is world renowned as the most adaptable wine region, producing exceptional wine experiences that consumers increasingly demand.

The Riverland is perfectly positioned to take advantage of global switches in style amongst emerging and current wine consumers to more interesting varietal mixes, lighter style red wines, more white wine, rosé, sparkling/frizzante, low and no alcohol wines and a range of environmentally friendly packaging options.

We have the industrial capacity to service the rapidly growing markets of Southeast Asia along with the ability to increase production of emerging products like low and no alcohol wines

and the diversity of grapes and innovative production mindset to satisfy changing consumer demands, including increasing sustainability expectations.

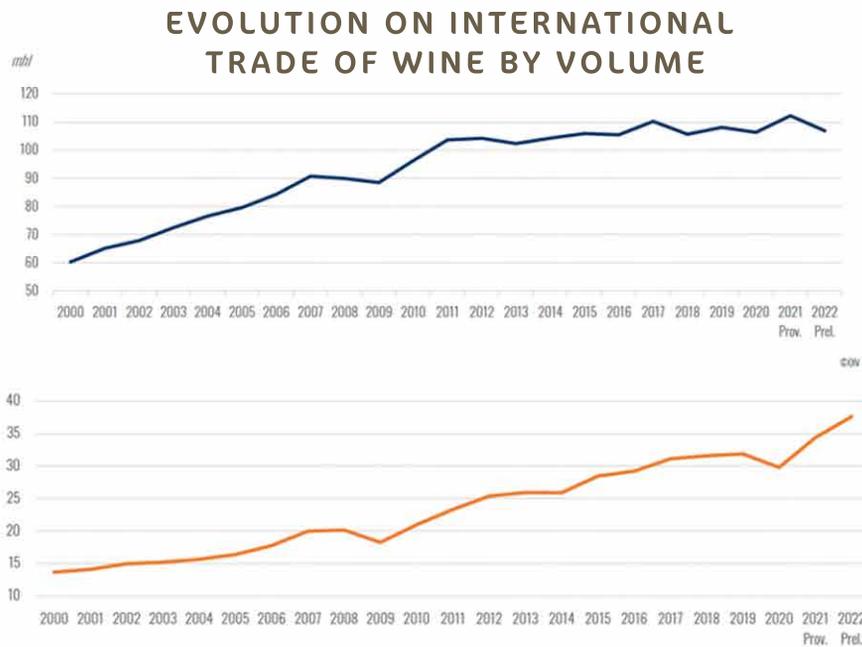
We do however need to create the additional resources, knowledge and capability within the region to grasp these opportunities.

The global wine trading boom

The value of wine exports/imports has grown globally from about \$23 billion in 2000 to \$62 billion in 2022, a compound annual growth rate of 5% per annum. In the same period, the volume of internationally traded wine grew from 6,000 million litres to 11,000 million litres.

The volume has been stable over the last 10 years, but the value continues to grow.

This global export boom is driven by the emergence of large markets such as Asia, North America, and South America.



The global taste transition

Premiumisation is a long-term trend where consumers look to add value to their everyday lives through a luxury that is easy to indulge in without breaking the bank. This has benefitted the wine sector with increasing interest in premium and super-premium products, whilst making the luxury wine market accessible to a wider range of consumers, creating huge interest in the world's leading collectible wines. Premiumisation has been occurring across price points and is seen across all categories of beverage alcohol.

The rise of neo-prohibitionism and the emergence of a health lobby focussed on alcoholic beverages is seeing changing tax regimes, increased labelling requirements and concerning messaging from major health authorities.



This is further driving premiumisation, with a 'more experience from less alcohol' approach amongst consumers driving the rapid growth of the low and no alcohol category and even an increase in abstinence.

There has also been significant growth in the number of products offering less than 100 calories in a standard serving and increasing interest in organic, natural and 'low intervention' wines as these are seen to be healthier lifestyle choices.

We are experiencing a major demographic shift as the Boomer generation retires, decreasing overall consumption as they age and driving an overall decrease in alcohol consumption at all price points.

Millennials and Generation Y exhibit broader tastes in beverage alcohol which is driving the spirits and cocktails, craft beer, rosé and natural wine booms.

They are showing more interest in lighter reds, rosé, sparkling wine, more aromatic whites, low and no alcohol options and driving interest in keg wine, bag-in-box and canned wines as part of seeking and experimenting behaviour. Continued and increased innovation is needed to attract a new generation of wine consumers.



The wine tourism opportunity

Another key opportunity is the potential to grow wine tourism. Situated along the majestic River Murray, the Riverland attracts over 400,000 domestic and international visitors each year.

Due to the small number of locally branded wine products, the region has not been able to take advantage of these visitor numbers to become a major destination for wine tourism and tourism-based brand building.

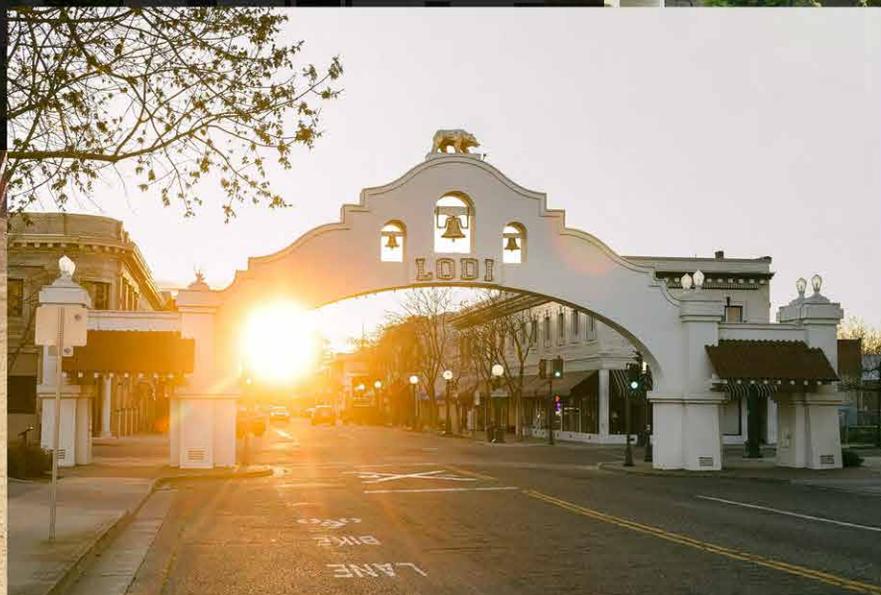
A case study on the Lodi wine region shows that the Riverland also has the potential to transform into a unique wine tourism destination with more cellar doors offering authentic food and wine experiences against the backdrop of a visually stunning and environmentally unique section of the River Murray.

A Case Study

'A rising tide lifts all boats' (Lodi Wine Commission)

Lodi is a wine region in the San Joaquin County of California which has previously faced similar challenges to our Riverland wine industry, although under different circumstances. Many smaller growers produced high volumes of commercial grade wine grapes that were sold to a small number of wine companies at low prices to be blended into the wine products of other regions or generic Californian wines.

The Lodi wine industry has now transformed into a vibrant community with a focus on sustainable grape production after the industry-funded Lodi Commission created America's first sustainable wine growing program "Lodi Rules" in 2005. Individual vineyards can become certified under the 'Rules' if they meet specific criteria including sustainability practices, business management and soil/water management. There are now over 1,200 vineyards certified and wineries pay bonuses to grape growers who have the Lodi Rules Certification.





The Commission works closely with the community and local growers, focusing on current issues relevant to the region including research and extension, sustainability, finance and communications. By actively supporting growers to become wine companies, making and marketing their own wine products, it has created more competition for grapes and stabilised grape prices.

Sustainability is also about people and 70% of Lodi kids now stay in the region after high school. The Commission has developed partnerships with high schools and colleges for better career pathways to ensure long-term business success.

The development of wine tourism in Lodi has helped build regional brand recognition and a sense of identity for Lodi winegrape growers. The Commission drove the “Visit Lodi” campaign where the wine industry wasn’t the only focus and have also opened the Lodi Wine Visitor Centre which includes a Regional Wine Tasting Bar where visitors can try wines that use Lodi wine grapes but are not necessarily made in Lodi.



A Major Wine Region

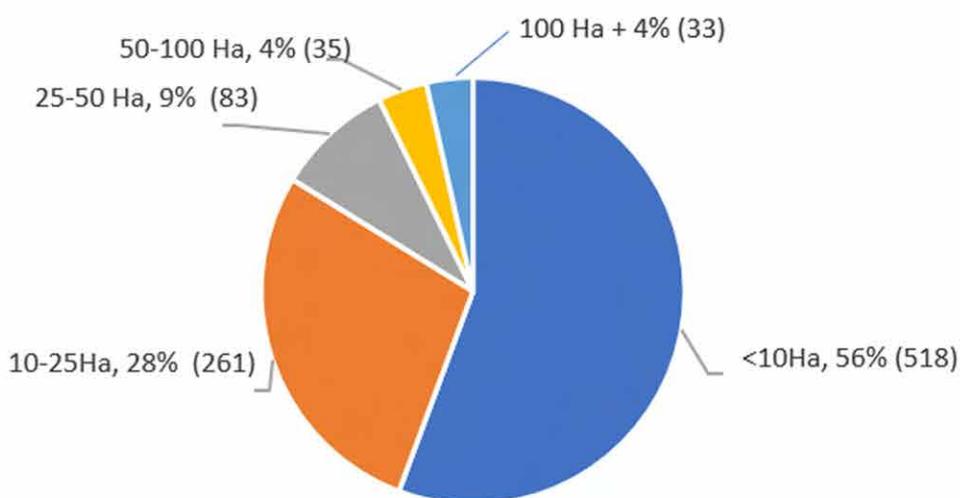
supported by small wine grape growers

The Riverland is the largest wine region in Australia by tonnage produced. The total wine grape crush for the region in 2023 was 410,888 tonnes, accounting for 62% of South Australia's and 34% of Australia's annual crush. Five varieties - Shiraz, Chardonnay, Cabernet Sauvignon, Merlot and Muscat Cordo Blanco - represent 75% of the Riverland vineyard area and about 72% of its 2023 crush.

There are 930 wine grape growing enterprises in the region, 518 of which (56%) are 10 Ha or less in size. Enterprises under 25ha in size account for 84% of the Riverland wine growers in total, meaning that the region is significantly represented by smaller-scale growers.



Number of Riverland vineyards by area



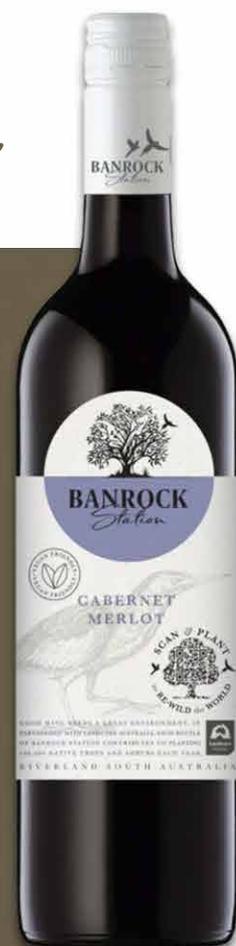
In 2023, 59 processors processed Riverland wine grapes, 49 of which (83%) are outside the Riverland GI.

Unique industry infrastructure

Approximately 95% of the total Riverland wine grape crush goes into corporate or commercial wine brands (less than \$10 a bottle). This is either exported as bulk wine and blended in foreign markets or blended into major wine brands run by large scale corporate wine businesses. The remaining 5% is vintaged into Riverland GI branded wines.

Most of our wine is produced through mechanisation to allow for scale,

costs of production and profit margins to be shared along the value chain. The competitiveness of this production system has been reduced by increasing input costs such as electricity, labour and logistics and the price controlling behaviour of global retailers, combined with increased competition from other wine supplying countries. Labour availability is expected to be a long term problem.



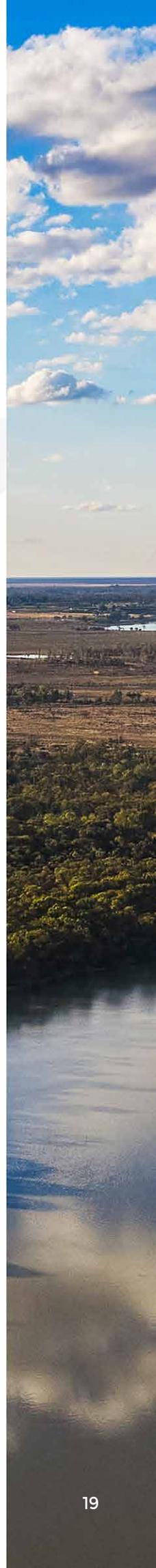
The Riverland relies on export markets with about 80% of our wine exported to over 100 countries as commercial grade or bulk wine. There is a direct relationship between average export price paid and average wine grape purchase price over time. The impact of the China embargo and COVID are clearly seen in this Figure.

Whilst some brands have had extraordinary export market success with Riverland GI branded vintage wines focussed on authenticity and quality, most are sold on the domestic market.

Average Export Price & Winegrape Purchase Price Over Time



Source Wine Australia



Impact of Declining Global Demand on Commercial Wine

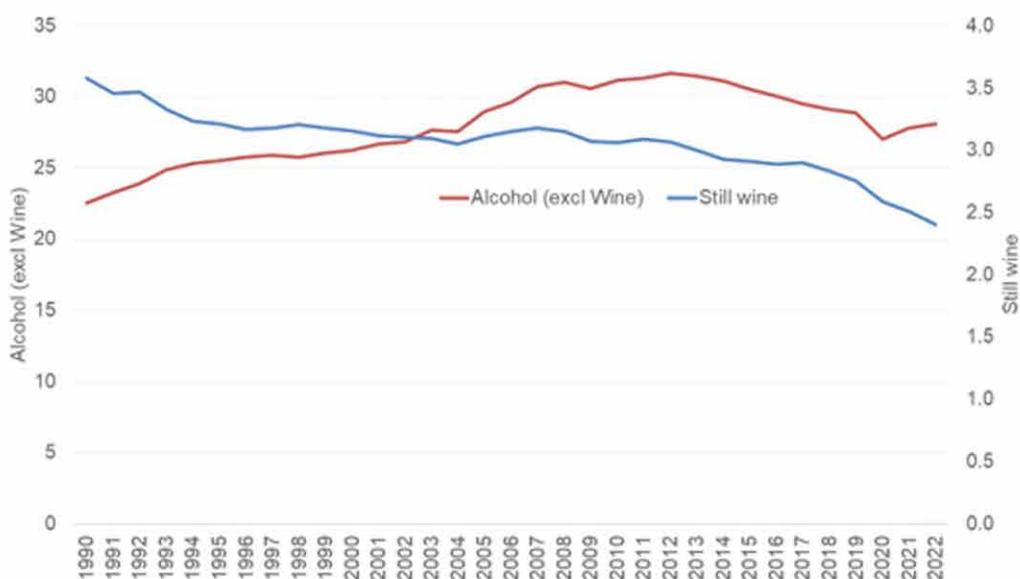
The global wine industry faces a huge challenge - declining wine consumption is causing a global oversupply of wine.

Lifestyle changes in traditional wine-consuming countries, competition from other drinks categories, austerity measures in China and regulatory challenges

such as stricter alcohol labelling laws, have all contributed to a fall in global wine consumption from its peak of 28 billion litres in 2008 to around 25 billion litres in 2023, despite population growth.



GLOBAL PER CAPITA CONSUMPTION - STILL WINE V OTHER ALCOHOLIC BEVERAGES (LITRES PER PERSON)



Source Wine Australia

The decline in demand for commercial wine in mature wine markets is well illustrated by the Australian market. The category accounted for 80% of the volume of domestic Australian wine sales in the late 1990s but stands at only 55% today. More than half the decline in Australia's value of exports in 2022-23 was in the less than \$5/litre price segment.

This decline is being felt at an industry level with commercial commodity wines being sold into a declining global market at increasingly lower prices creating a viability problem for many grower enterprises.



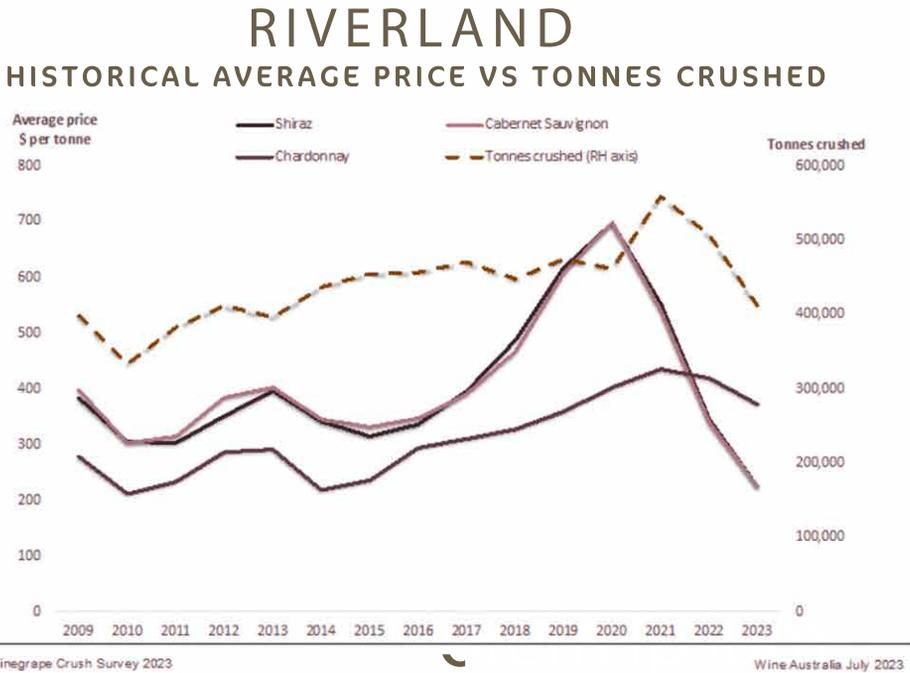
Impact on the Riverland of the global wine supply - demand imbalance

Riverland total wine grape crush in 2023 was down 19% compared to 2022, the lowest recorded for the past decade and 16% lower than its four-year average. This was compounded by a 19% decrease in the average purchase value of grapes, from \$391 per tonne in 2022 to \$318 per tonne which is below the cost of production for most growers.

It was the third year in a row that grape prices

declined. The impact was largely in red wine grapes which fell 31% from \$369 per tonne in 2022 to \$254 in 2023. This is the lowest price recorded for at least 30 years (before adjusting for inflation).

Additionally, Wine Australia’s Grape Price Indicators dashboard is forecasting even lower prices for red wine in 2024.



Wine production has exceeded wine consumption globally over the past 10 years consistently, with consumption forecast to be flat for at least the next four years. Therefore, prices paid for wine grapes and exported wines have barely grown over the last decade. Sales of commercial wine are now so low that many low-quality Riverland grapes were not harvested in 2023. Despite this, there was still an oversupply in the global inventory of commercial grade red wine.

The stock to sales ratio (SSR) measures the level of wine stock compared to wine sales. This has an inverse relationship with grape prices and from 2015 to 2020 the SSR was steady or declining, causing grape prices to rise. From 2021, however, SSR rose due to an increasing oversupply of wine which was expected to continue for the foreseeable future. As a result, grape prices dropped, particularly for some red grape varieties.



OUTLOOK

Inputs and Labour

Production costs are rising due to the impacts of climate change, as well as increased input costs such as electricity and labour. Temperatures during the current growing season are already at the high end of those which are ideal for producing quality wines from the dominant red varieties, so any increase is likely to affect growing conditions.

The availability of water at low prices has helped us survive low wine grape prices but if, as predicted, seasons become drier, the price of water leasing will rise significantly and further erode the future viability of the industry.



Labour costs have gone up due to low availability with further labour issues having the potential to impact production capacity. Low prices also affect competitiveness for labour within the region.

Irrigation Water Outlook

South Australia's annual water entitlement for the River Murray is still guaranteed at 1,850 GL. However, increased impacts of climate change in the future will likely result in less than 100% of this water being made available. Some estimates have this at 60% a year on average by the end of this decade.

With significant expansion of permanent plantings over the last decade in the Murray-Darling Basin, it is predicted that, in future extreme dry periods, there will

be insufficient water available to meet the irrigation requirements of all permanent crops. The shortfall is estimated to be somewhere between 25% to 60% of the water required.

As grape growers leave the industry or retire and sell their vineyards, a large volume of permanent entitlement irrigation water is expected to be sold at a crucial time of industry adjustment with a risk of significant permanent water loss from irrigation production.



People Outlook

The ageing demographic of the Riverland wine industry further complicates the outlook for the industry.

Most grape growers in the region are aged 50 years or over. At least 20%, or about 200 of mostly smaller Riverland wine grape growers, have indicated they will retire or leave the wine industry over the next few years and there is not currently a comprehensive plan for attracting young

people to the region generally, or the wine industry specifically.

The impact of grape growers leaving the industry will likely increase the need for social services and support for growers. Further, environmental and biosecurity risks from abandoned vineyards will also likely increase in the region.



Strategic Priorities

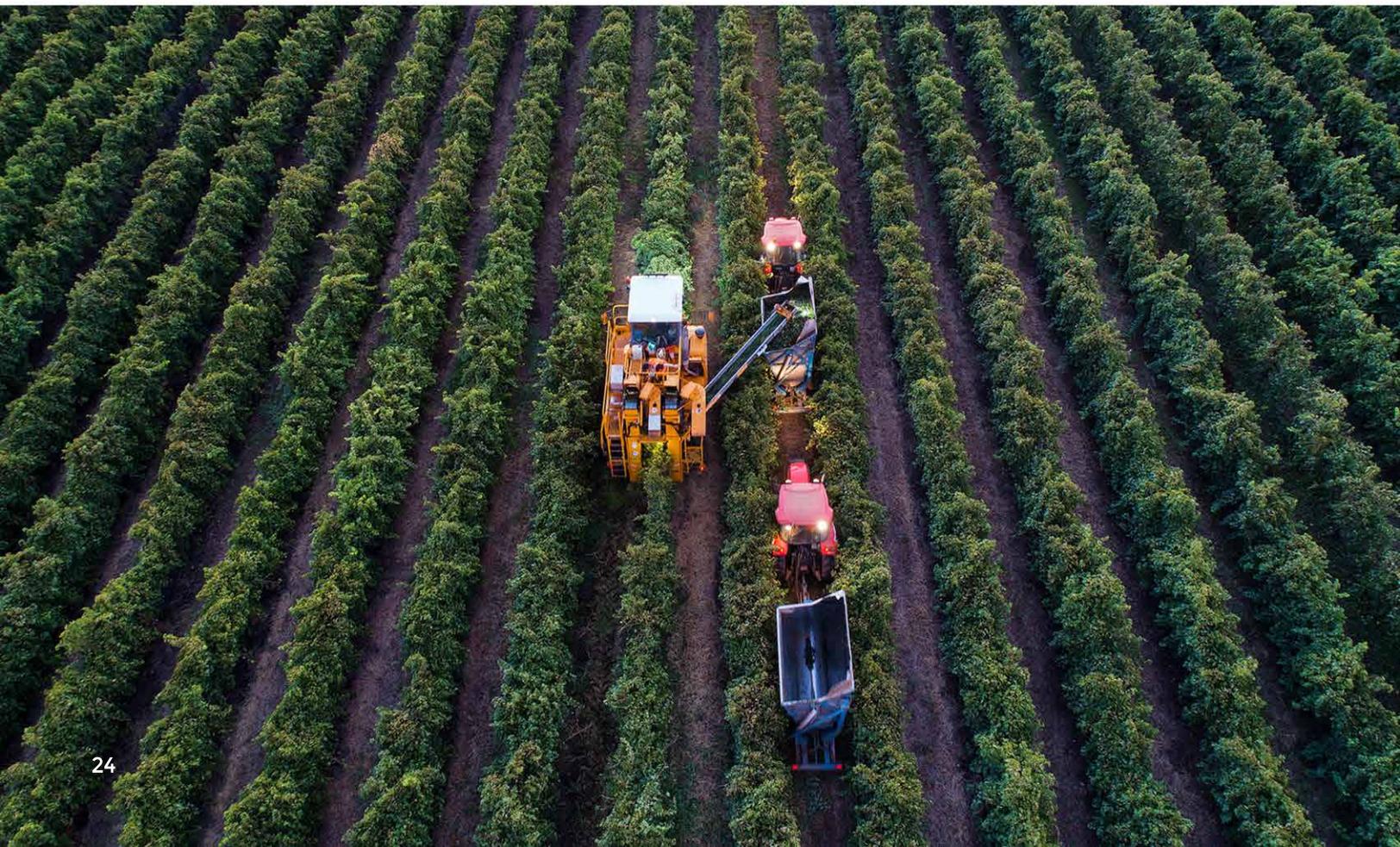
Priority One

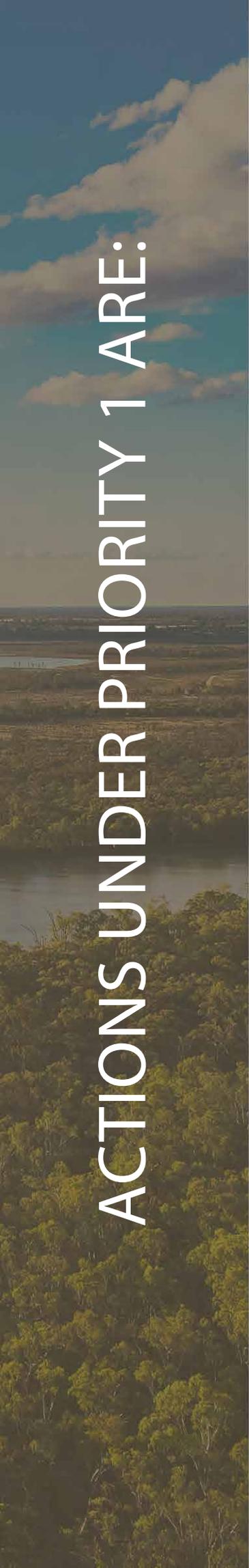
A rapid transition to more sustainable production levels

Goal:

Support an orderly transition out of grape growing for those that are leaving and support those that are modernising wine grape production.

Ensure the productive capability for cropping in the region is maintained. Minimise short term social and environmental impacts of the adjustment while preserving regionally important assets.





ACTIONS UNDER PRIORITY 1 ARE:

- 🍷 Prepare for increased demand for social services and wellbeing support for Riverland grape growers as they leave the industry.
- 🍷 Promote the use of practical financial tools to determine minimum grape prices at varying scales and locations of production so individual growers can quickly complete a break-even analysis.
- 🍷 Investigate opportunities to utilise surplus wine stocks.
- 🍷 Investigate ways to retain permanent water entitlements sold by Riverland wine grape growers for future local production during the transition period.
- 🍷 Assist Riverland wine grape growers to transition into new production methods, alternative commodities or other business prospects such as crop transition, improving water use efficiency and productivity, targeted research and development, and support to reduce the environmental and biosecurity risk of abandoned vineyards.
- 🍷 Partner with the One Basin CRC research project, “Water Futures” to deliver an action-focused case study which will identify the factors required for the transition and assist with planning.
- 🍷 Identify and promote flexible vineyard management practices that can be used during periods of expected economic stress to enable more adaptable grape production such as resting vineyard systems.
- 🍷 Promote alternative farming systems to achieve increases in scale, for example amalgamating smaller vineyards or collaborative farming models.
- 🍷 Promote SA government trade facilitation and exporter capability services to Riverland wine businesses and provide export assistance tailored to Riverland wine producers.



Priority Two

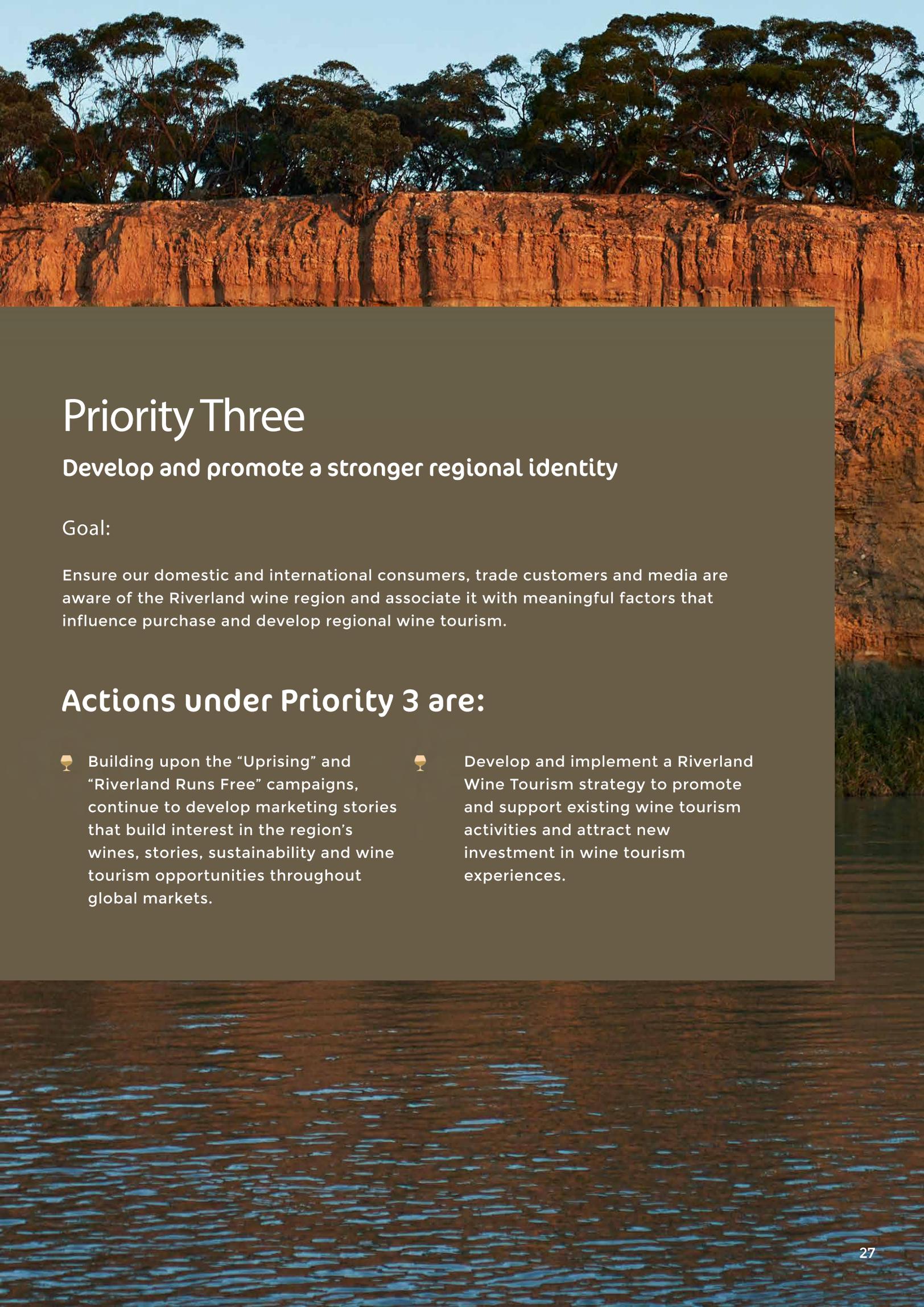
Become more adaptable to changing consumer and market trends

Goal: Attract new investment to the Riverland to efficiently produce wine grapes in every price band and develop new products that meet modern market trends using sustainable processes.

ACTIONS UNDER PRIORITY 2 ARE:

- Support transition to wine grape varieties and wine styles that meet market demand and including hot Mediterranean varieties which are suited to the Riverland climates. Improve the understanding of the most effective and economical methods to change existing grape varieties to these new varieties.
- Improve our understanding of the Riverland wine value chain so we can improve the transparency of the value chain for wine grapes including discounts and quality penalties.
- Access and disseminate data and information on global wine trends and host regular local and international market insights events to support production of market driven wine.





Priority Three

Develop and promote a stronger regional identity

Goal:

Ensure our domestic and international consumers, trade customers and media are aware of the Riverland wine region and associate it with meaningful factors that influence purchase and develop regional wine tourism.

Actions under Priority 3 are:

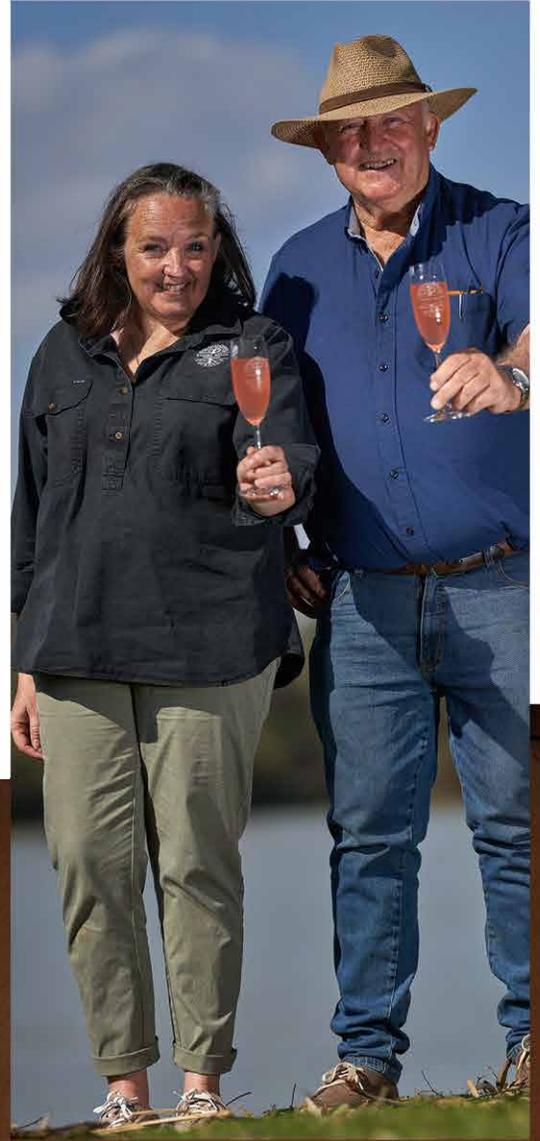
- 🍷 Building upon the “Uprising” and “Riverland Runs Free” campaigns, continue to develop marketing stories that build interest in the region’s wines, stories, sustainability and wine tourism opportunities throughout global markets.
- 🍷 Develop and implement a Riverland Wine Tourism strategy to promote and support existing wine tourism activities and attract new investment in wine tourism experiences.

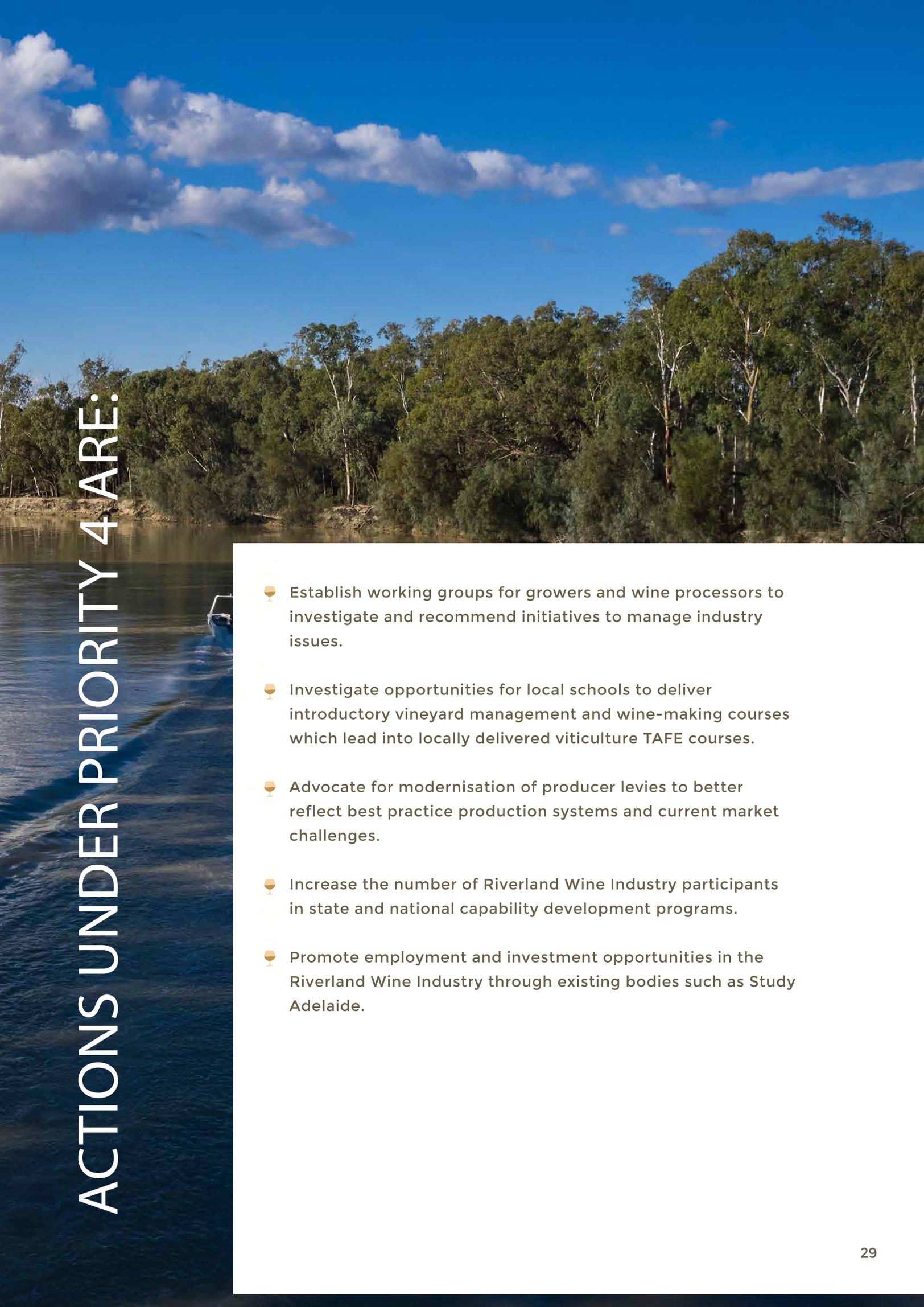
Priority Four

Develop passionate leaders and a skilled workforce

Goal:

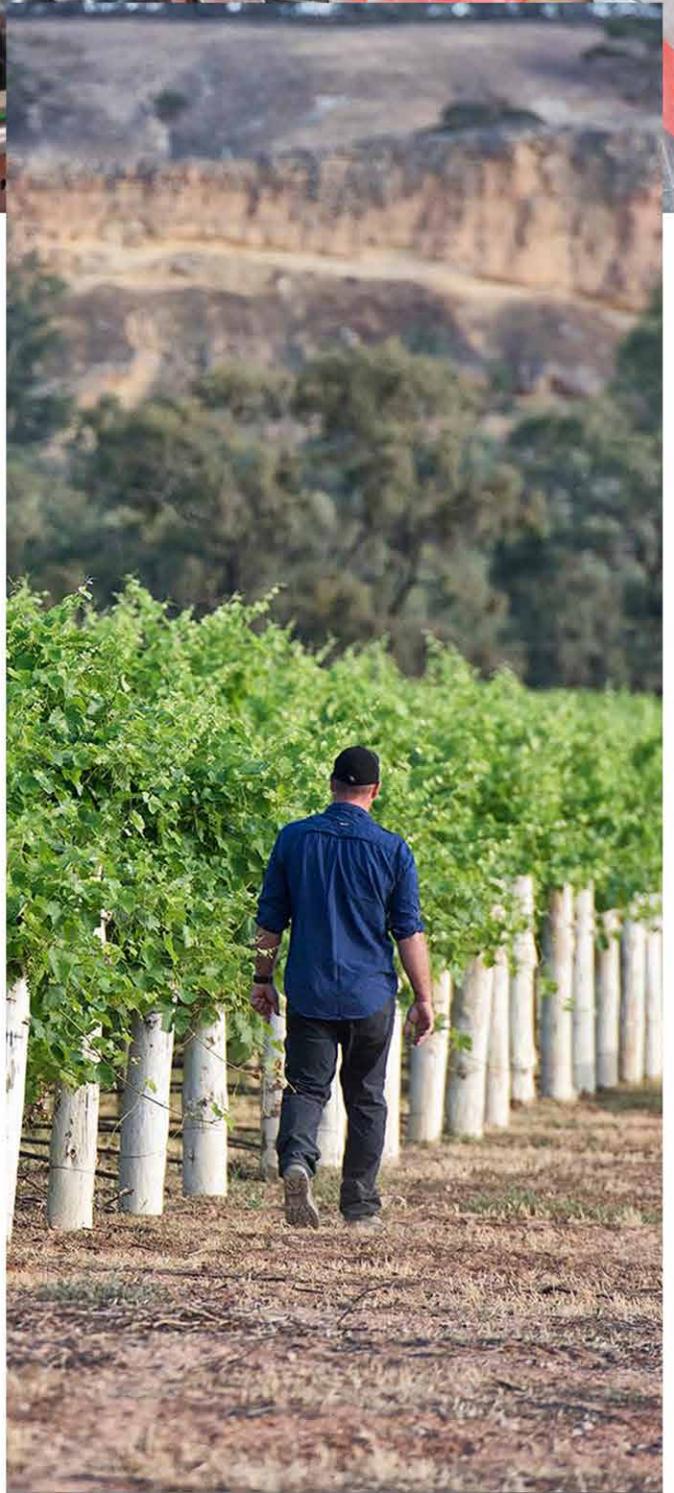
Support industry leaders to engage and collaborate with all stakeholders and apply high governance standards to ensure industry funds are invested in priority areas including attracting and educating new industry participants.





ACTIONS UNDER PRIORITY 4 ARE:

- 🍷 Establish working groups for growers and wine processors to investigate and recommend initiatives to manage industry issues.
- 🍷 Investigate opportunities for local schools to deliver introductory vineyard management and wine-making courses which lead into locally delivered viticulture TAFE courses.
- 🍷 Advocate for modernisation of producer levies to better reflect best practice production systems and current market challenges.
- 🍷 Increase the number of Riverland Wine Industry participants in state and national capability development programs.
- 🍷 Promote employment and investment opportunities in the Riverland Wine Industry through existing bodies such as Study Adelaide.



Priority Five

Support agile wine businesses that are sustainable and profitable.

Goal:

Support more Riverland wineries and growers to achieve higher price points by developing new and sustainable wine brands. Realise the significant wine tourism opportunity to grow the market for higher value wine grape products.

ACTIONS UNDER PRIORITY 5 ARE:

- 🍷 Accelerate the uptake of Sustainable Winegrowing Australia accreditation.
- 🍷 Drive new product development using existing and new grape varieties and targeting new opportunities such as low and no alcohol beverages to grow new consumer recruitment and demand.
- 🍷 Increase the number of Riverland branded wine companies actively participating in targeted international and local trade events.
- 🍷 Support the creation of new Riverland wine brands.
- 🍷 Promote collaborative contract crushing capacity and investigate the opportunity for a small run packaging operation for smaller regional wine processors.
- 🍷 Fast track the development of marketing capabilities within local winery brands in areas such as master brand development and broader direct-to-consumer marketing tactics.
- 🍷 Investigate establishing funding programs to stimulate investment in world class Riverland Cellar Door experiences.
- 🍷 Promote the PIRSA Agtech demonstration farm and Wine Australia's Agtech Program. Demonstrate and promote the uptake of emerging mechanisation and digital technologies to improve vineyard productivity and profitability.
- 🍷 Develop education programs for grower businesses to move up the value chain and build wine-making businesses.



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**Wine
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