Wine Australia

Global market update 2026

Asia Pacific update



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The big picture

Asia Pacific's Strategic Role

Asia Pacific offers long-term growth through expanding middle-class consumption in evolving markets, premiumisation, and strong trade connections.

Strategic Objectives

Defend where Australia is strong. Grow share where Australia is under-represented. Build frequency and penetration where wine is still emerging.

FY27 Objectives

Targeted market development, informed by consumer and trade insight, with activity prioritised by market role and expected impact.





Market reality

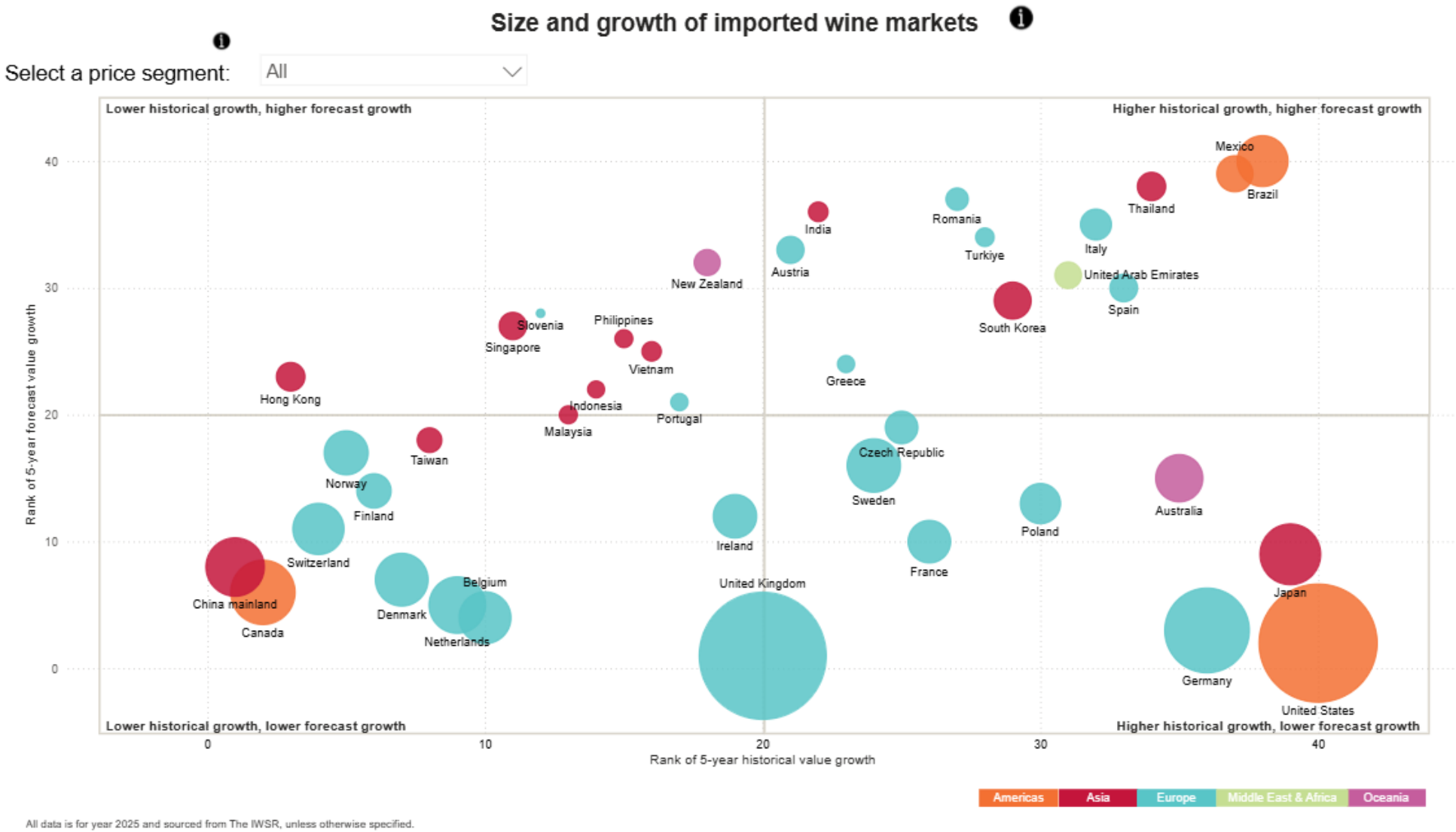
Market challenges

- Economic volatility
- shifting consumer preferences
- increasing competition from local and international beverage categories

Growth opportunities

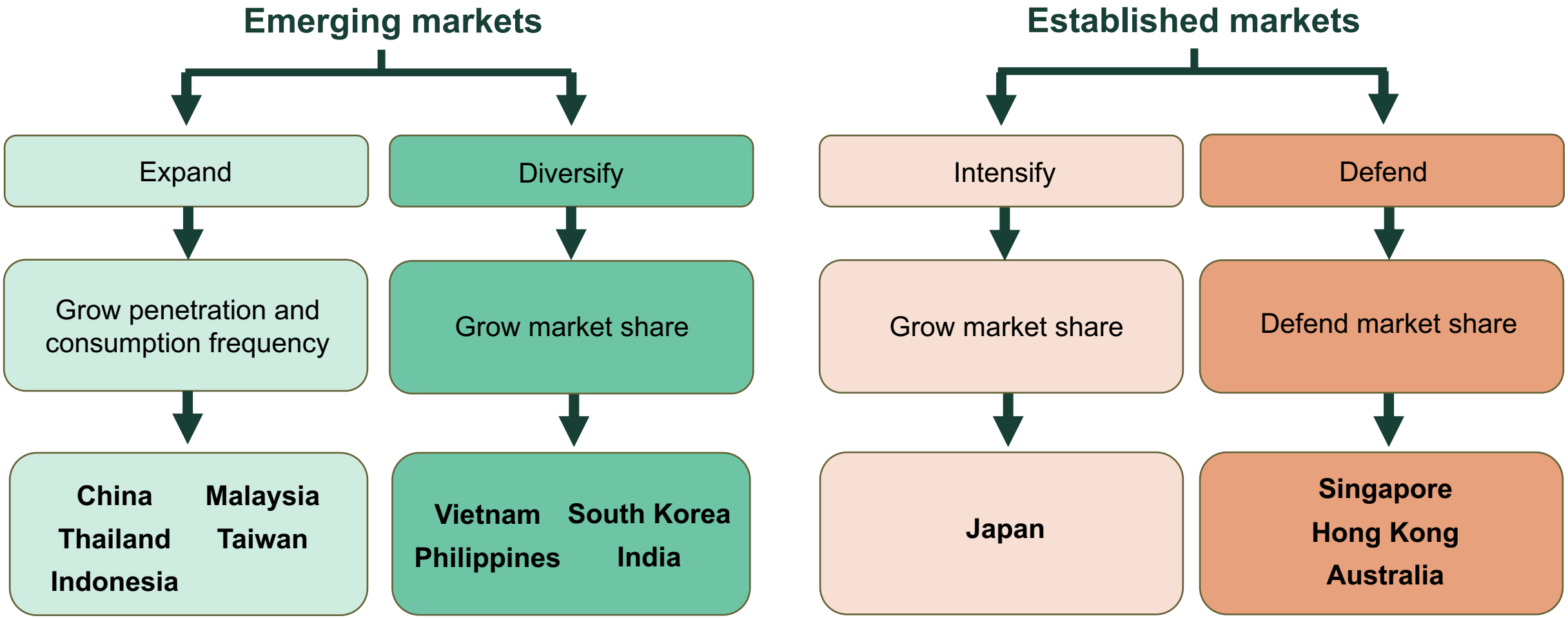
- Rising affluence
- premiumisation trends
- growing consumer interest in wine education and experiences

The big picture



All data is for year 2025 and sourced from The IWSR, unless otherwise specified.

Regional portfolio roles

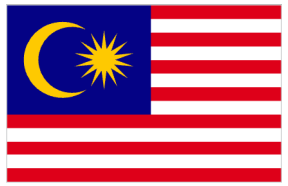


Key focus markets

Mainland China



Southeast Asia



Malaysia



Philippines



Indonesia



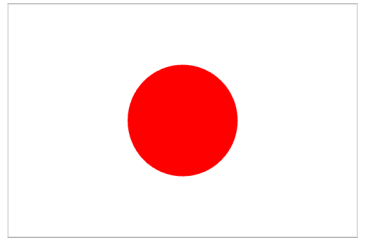
Vietnam





Thailand

Japan



South Korea



Building future demand

Vietnam, Philippines, India, South Korea

Diversify









Insight

Wine is low penetration and Australia is under-represented. Consumer confidence, familiarity and local relevance are constraints.

Objective

Build the foundations for share growth by making Australia easier to understand, easier to sell and more locally relevant.

FY27 Tactics

Invest in education, localisation and growing our trade networks before building on consumer relevance.

What does success look like?

More active Australian wine advocates in-market, clearer “why Australia?” messaging, improved trade confidence and stronger pull-through support for trade.

Growing with the market

China, Thailand, Indonesia, Malaysia, Taiwan

Expand











Insight

Australia already has a meaningful or market-leading share, but wine remains a relatively small part of total alcohol consumption.

Objective

Increase market penetration and consumption frequency where Australia has a base to build from.

FY27 Tactics

Turn awareness into more occasions by matching Australian wine to local food, climate, lifestyle and hospitality moments.

What does success look like?

Frequency expands without diluting premium positioning; trade partners have clearer reasons to recommend Australian wine more often.

China Roadshow

Strategic shift from market re-entry to market building

Focus on premium, locally familiar occasions, modern lifestyle positioning, and relevant emotional cues.

- Facilitate trial opportunities to build familiarity and approachability
- Lead with styles that align with consumer preferences
- Digital and social-first communication – aligned with shifting e-commerce landscape
- Activate education and discovery platforms that enable Australian wine to be easily understood – storytelling, food pairing etc.



Southeast Asia Roadshow

Flexible platform meeting needs of diversification and expansion markets

Focus on premium occasions, modern lifestyle positioning, food pairing.

- Connect Australian wine to locally familiar occasions
- Collaboration with premium local retail and on-premise brands
- Shift focus to food and climate-appropriate styles in line with consumer preferences
- Tie to a sense of fitting in and belonging as emotional cues
- Lean into approachability of Australian wine



Markets working harder

Japan

Intensify



Insight

Australia has low share in an established wine market, with quality-conscious consumers and strong premium opportunity.

Objective

Intensify Japan through increased differentiation and premium relevance.

FY27 Tactics

Continue to establish quality, credibility and local relevance. Use richer storytelling, premium and trade-led advocacy, and credible, locally-relatable proof points.

What does success look like?

Trade and consumers have increased confidence, and a compelling answer to ‘why Australia?’ against both domestic and imported competitors.

Japan Roadshow

Demonstration of commitment to the market and support for the trade alongside commercial opportunities

Focus on premium occasions, differentiation and local relatability.

- Connect Australian wine to premium consumption moments
- Reinforce Australia's quality credentials
- Provide reasons to believe – locally relevant proof points around 'why Australia'
- Leverage influential trade endorsement and advocacy
- Continue to build important importer and distributor relationships through demonstrated sales support initiatives



Holding higher ground

Singapore, Hong Kong, Australia

Defend

Insight

Australia already has a market-leading share in these established wine markets, but share is easier to lose than rebuild.

Objective

Protect existing share and maintain confidence.

FY27 Tactics

Stay visible, strengthen advocacy, and maintain consumer connection with Australian wine whilst protecting our premium credentials.

What does success look like?

Australian wine maintains share and premium position, remains a preferred choice among trade and consumers, and continues to command value growth.







Vinexpo Asia

Flagship exhibition to leverage regional influence and reinforce our position

Focus on premium positioning, deeper storytelling.

- Platform to facilitate the telling of Australian wine stories
- Reinforce Australia’s quality credentials
- Connection platform for trade networks across the region
- Education to build preference and maintain confidence



In summary

1. **The Asia Pacific region is a portfolio of markets -** Different markets require different approaches: defend, intensify, expand, diversify

2. **Premium demand is built through trade leverage –** Building our community and partnering with our in-market advocates are our route to scalable impact.

3. **FY27 success depends on insight-driven activity -** Education, activations, communications must be based in market need and consumer motivations.

FY27 is sharper activity, in the right markets, with the right partners, for measurable results and premium outcomes.