Wine Australia

Global market update 2026

Americas update



Aaron Ridgway

Regional General Manager, Americas



Americas Market Strategy FY27

Maximise the Canada opportunity

- Trade policy issues have handed Australian wine more shelf space. We need to move quickly and take advantage.

Invest in stability and discovery in the US

- The world's most attractive wine market is resetting. Continuing to invest and think long-term is essential.

Intensify commercial programming

- Pressure on budgets means we need to be creative and ensure as many dollars as possible benefit wineries.

Unlock more partnership value

- Funding support from DAFF, ANMI and states and regions helps facilitate a true "Team Australia" approach and extend activation impact.

Alignment to 5-year strategy

Americas' Strategic Role

- US declines are projected to continue into 2027, but it leads the world in value, influence and shaping of future trends.

Key Initiatives

- Roadshows and education keep Australian wine front of mind, while liquor board programs and incentives drive sales.

Strategic Objectives

- The strategy supports export growth, sustainability, and trade capability building over five years.

Global Brand Contribution

- Promoting Australian wine in the Americas is critical to positioning Australian wine globally and boosting exports.



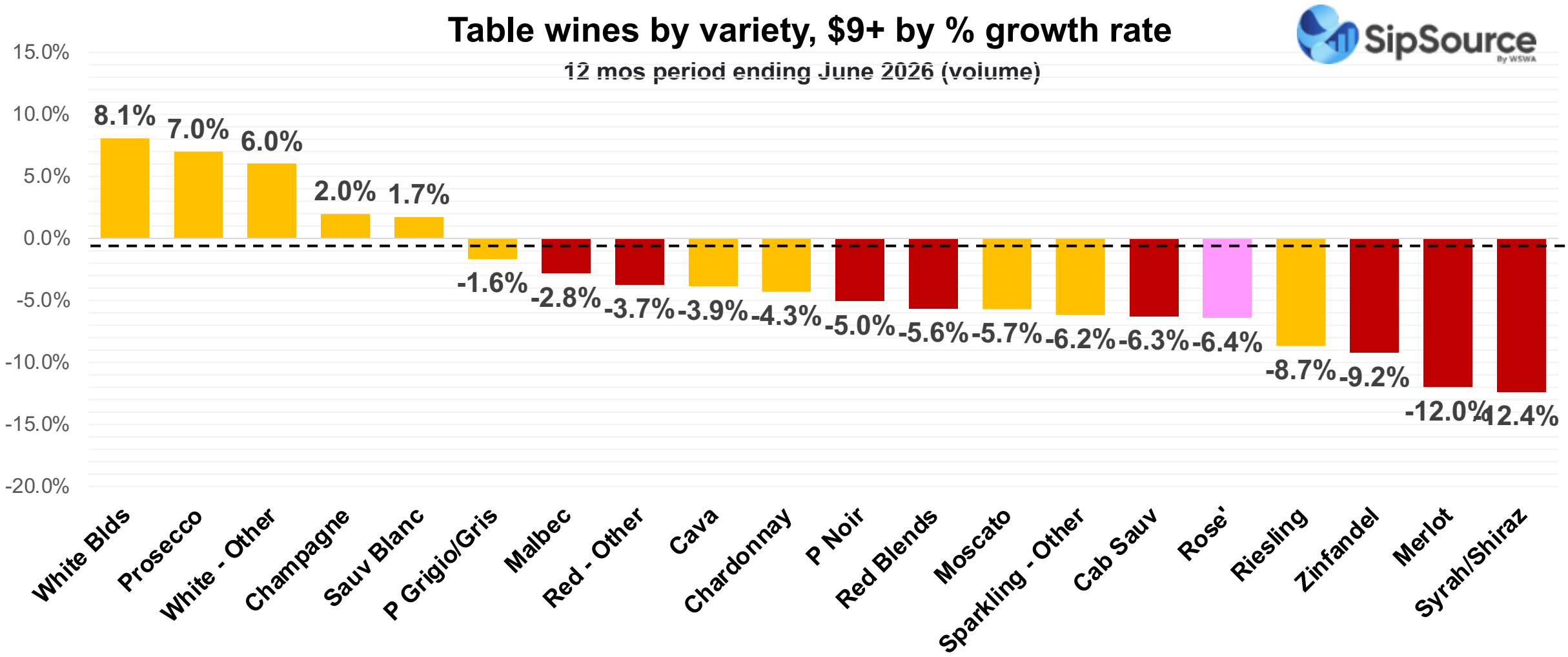
United States

Defend

- Projected to slip by 3.5% in 2026 (Impact Databank)
- Historic rupture in distribution
- Import growth has slowed
- Ongoing pressure from anti-alcohol groups
- Bright spots exist: whites, fresher styles, small packs
- Restaurants are busy!
- Focus in FY27: smaller, more targeted events; support for importers; storytelling that aligns to market



White Varietals (incl Sparkling) Generally Performing Better



Canada

Intensify

- Finally, strong demand for Australian wine!
- But trade policy is driving it
- New entrants contributed 1% of total export value
- Aggressive activity plans to maximise US delisting and keep liquor boards focused on category
- $200,000 in ANMI funding confirmed. Another $300,000 scoped and awaiting approval
- Strategic support for smaller liquor boards



Emerging markets

Diversify

- Growth is forecast in both Brazil and Mexico
- But Australia lacks critical mass (less than $2.5m exported in the 12 months to June)
- Brazil: build presence at ProWine Sao Paulo. Work with Consulate to amplify Australian storytelling
- Mexico: additional mapping of the opportunity needed. Initial trade engagement in partnership with Embassy in Mexico City (TBD)





North America Roadshow

- Visiting Houston, Washington D.C., Montreal and Toronto in April/May ‘27
- Trade and consumer activations (potential support from ANMI)
- Theming TDB but will be aligned to market opportunity
- Potential for commercial add-on pending ANMI funding availability
- 240 key attendees in 2026; perception change; connections; new placement incentive



AWD on the Road

- Charleston, Tampa and Austin in September ‘26
- Seminar theme is *Style Shifts: Australia’s Varietal Evolution*
- Walk-around tasting afterwards with wines consistent with seminar theme
- Part of continued exploration of smaller markets
- Perception change; connections







LCBO activities

LCBO

- Middle Nesting Table: prominent 12-sku displays in 144 stores. With added ANMI funding, this year includes multi-channel marketing support: tastings, print & digital
- SA Pop Up Shop: Enhanced displays and in-store tastings (DSD funded)
- LCBO Vintage Event: “liquid to lips” activation for 500 highly engaged consumers (DSD funded)
- Sales reporting, insights from in-store tastings, social reach



Support for other Canadian liquor boards

- Maritimes education campaign: masterclasses for category managers and retail staff in Nova Scotia, New Brunswick and Prince Edward Island ($60m+ in retail sales value combined. ANMI funded)
- 100 in-store tastings in SAQ stores
- SAQ instore merchandising program
- Masterclass for SAQ retail staff featuring theory and practical components (ANMI – TBC)
- SAQ *Inspire* consumer loyalty program (ANMI – TBC)
- BCLS in-store tasting program (DSD funded)
- 2x BCLS product consultant trainings (ANMI – TBC)



NSLC
BEER · WINE · SPIRITS

ALCOOL · NB · LIQUOR
BEER SPIRITS WINE
BIÈRES SPIRITUEUX VINS

PEI LIQUOR
ALCOOL Î.-P.-É.

SAQ

BCL





Other Canada activity

- Wine Festival Toronto Holiday Edition
- SIP Toronto
- Vancouver Wine Festival – seminar only
- Top Drop Vancouver (TBC)
- Recently launched Wine Australia stakeholder updates
- Regular engagement with High Commission, Consulate, Austrade team









Australian Wine Discovered

- **Wine Education Organisations (Institute of Masters of Wine, Society of Wine Educators, TEXSOM, Napa Valley Wine Academy, American Wine Society)**
- **Colleges and Universities (Cornell, Harvard, Auburn, Johnson & Wales, Michigan State, Wharton)**
- **Other trade work (seminars, distributor trainings)**

<u>FY26 summary</u>

- **1500+ attendees**
- **20+ activities**
- **180+ wines**
- **94% satisfaction rating**
- **Perception rating (pre): 6.98**
- **Perception rating (post): 9.04**

October trade trip

- Six winners drawn from Roadshow markets
- Required to complete written responses and be in buying roles
- In-market only: commercial impact is maximised

FY26 highlights

- 410 wines, 116 producers
- 100% satisfaction rating
- Perception rating (pre): 6.5
- Perception rating (post): 9.83
- Commercial outcomes



Other initiatives

- New placement incentive – Sep/Oct
- ProWine Sao Paulo Masterclass - Oct
- Importer Interviews - Dec
- Potential leveraging of IMW – Feb (TBC)
- Support for SA/Vic Government activities – 2026









Measures of success – how will we know it's working?

Value

Grow average price per litre and premium-tier value share in priority markets.

Engagement

Trade reached through masterclasses, events, trade trip attendees.

Share

Defend in the US. Grow in Canada. Diversify in Brazil and Mexico.

Sustainability

Communicate importance to customers. Profile wines when available.

Distribution

New placement incentives convert to immediate, reportable sales.

Diversification

Australian presence enhanced in Brazil and Mexico.

Perception Change

Increase in favourable perception post education activities, trade trip.

Attendee Satisfaction

High satisfaction rating with trade attendees for educational content, wine selection.

Commercial Potential

High satisfaction rating with exhibiting importers/wineries on commercial programming opportunities.