Wine Australia

Global market update 2026

Insights to impact

Australian wine in a reshaped global market



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HOLDEN
QRP 017
VICTORIA - THE PLACE TO BE.

The market has reset

A smaller, more selective global wine market

Consumption down 2.7%[1]

IWSR estimate decline of 14% to 2035[2]

A$2.30b

Australian wine export value in the 12 months to June 2026, down 7%

7.0 mha

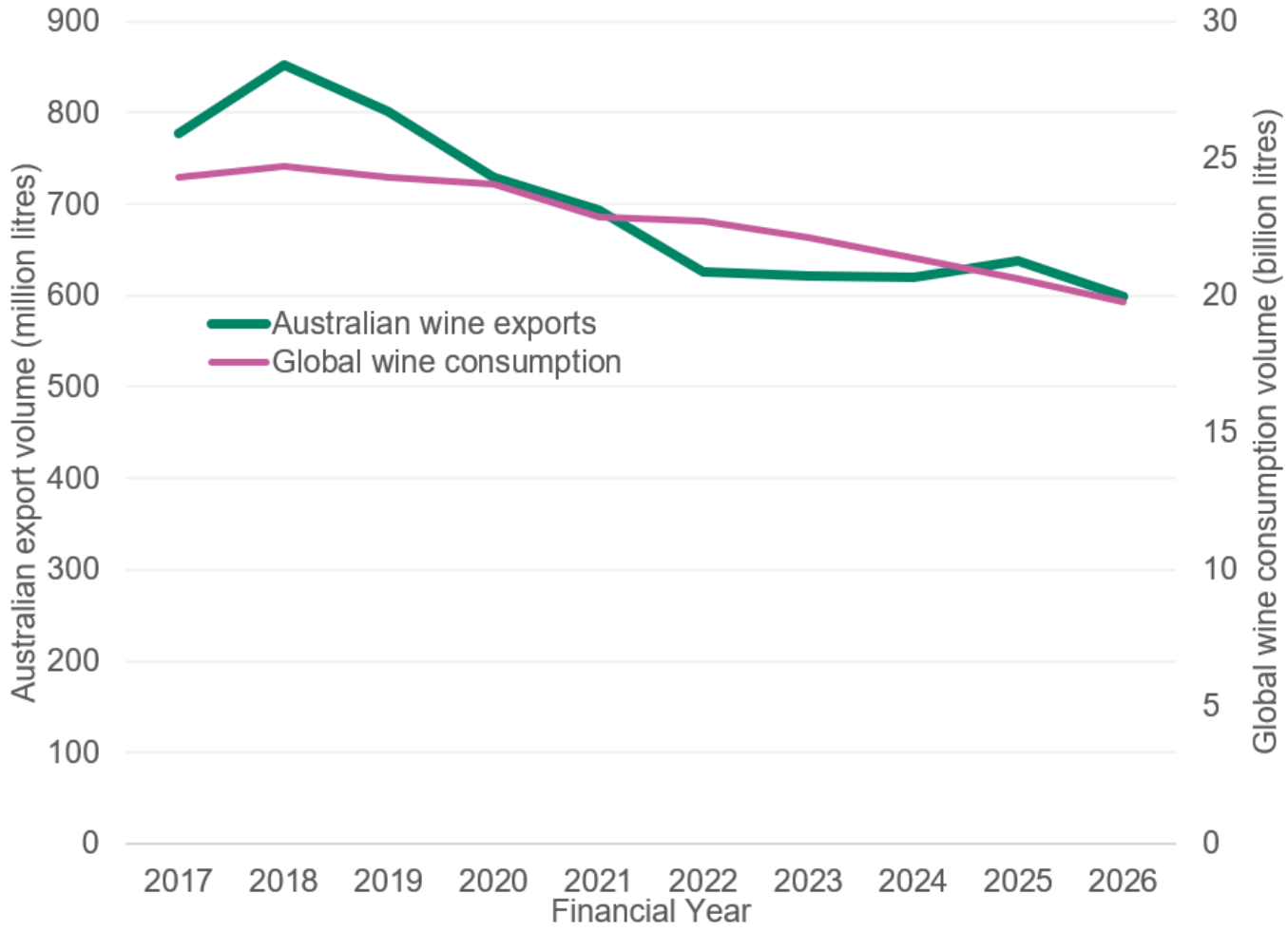
Global vineyard area in 2025, sixth consecutive year of contraction [1]

598 ML

Australian export volume in the 12 months to June 2026, down 6%

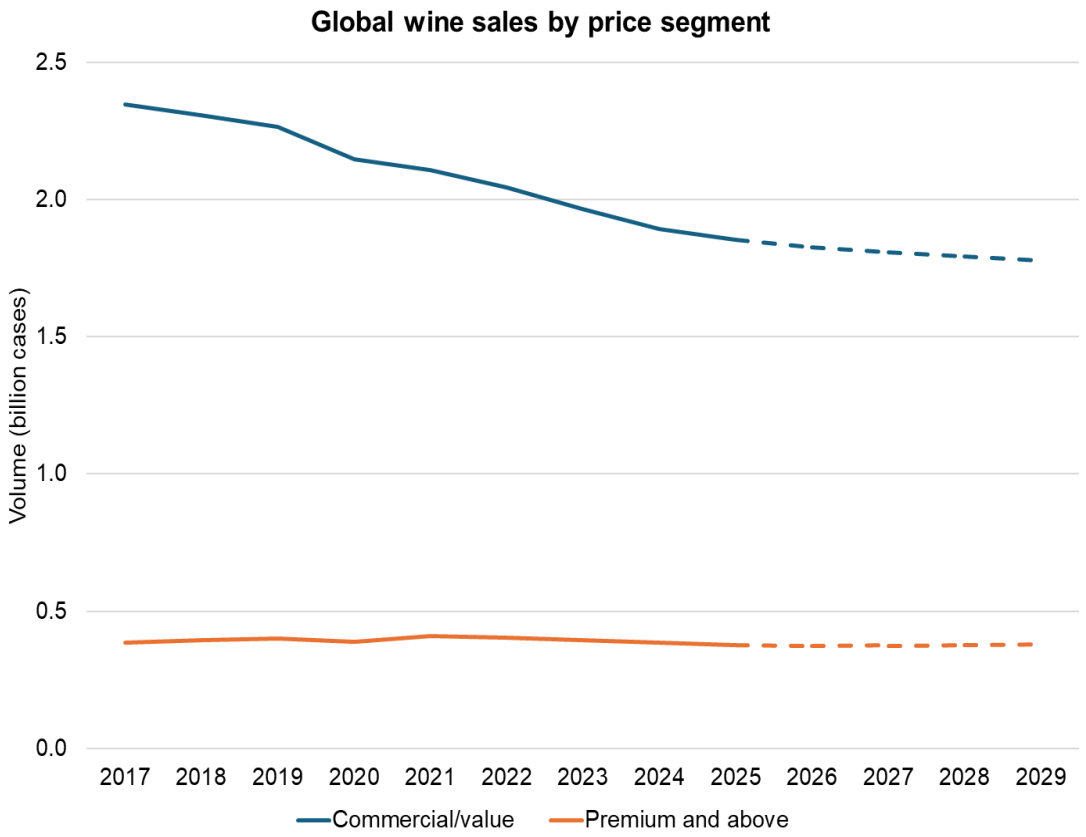
Source: OIV, IWSR and Wine Australia

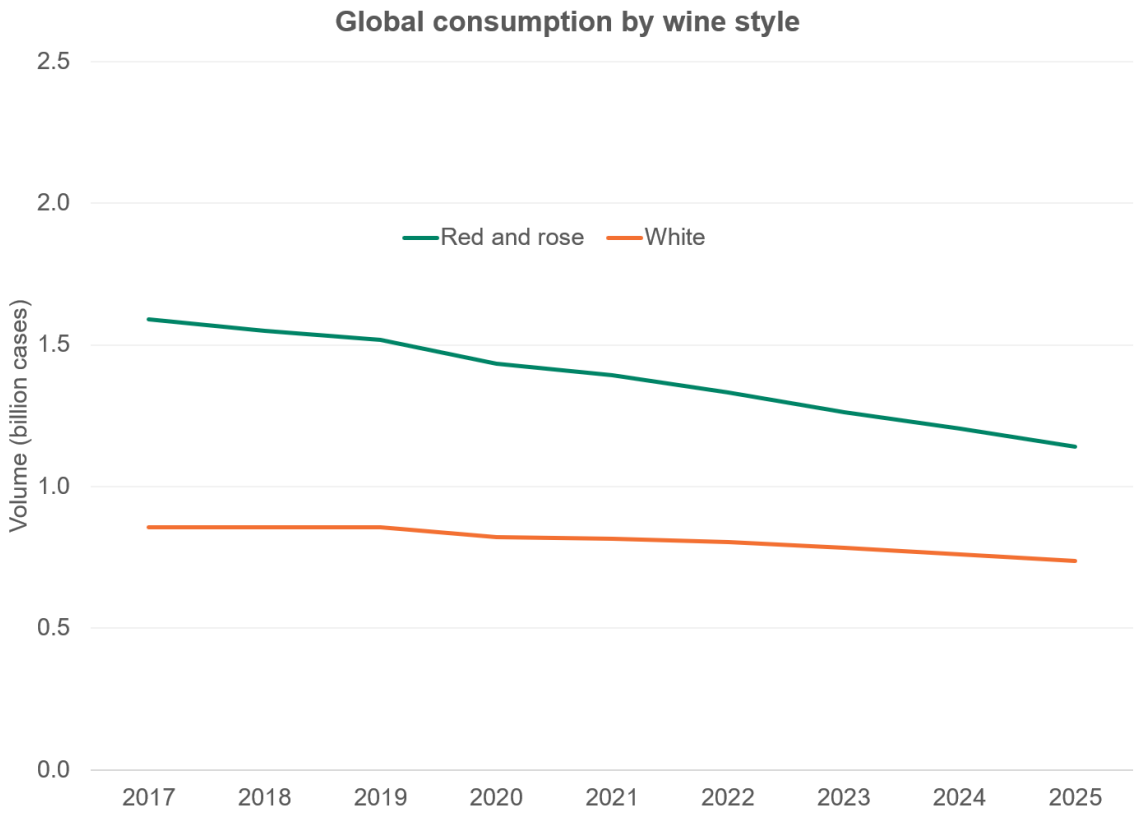
Australia mirrors global trends



Source: IWSR and Wine Australia

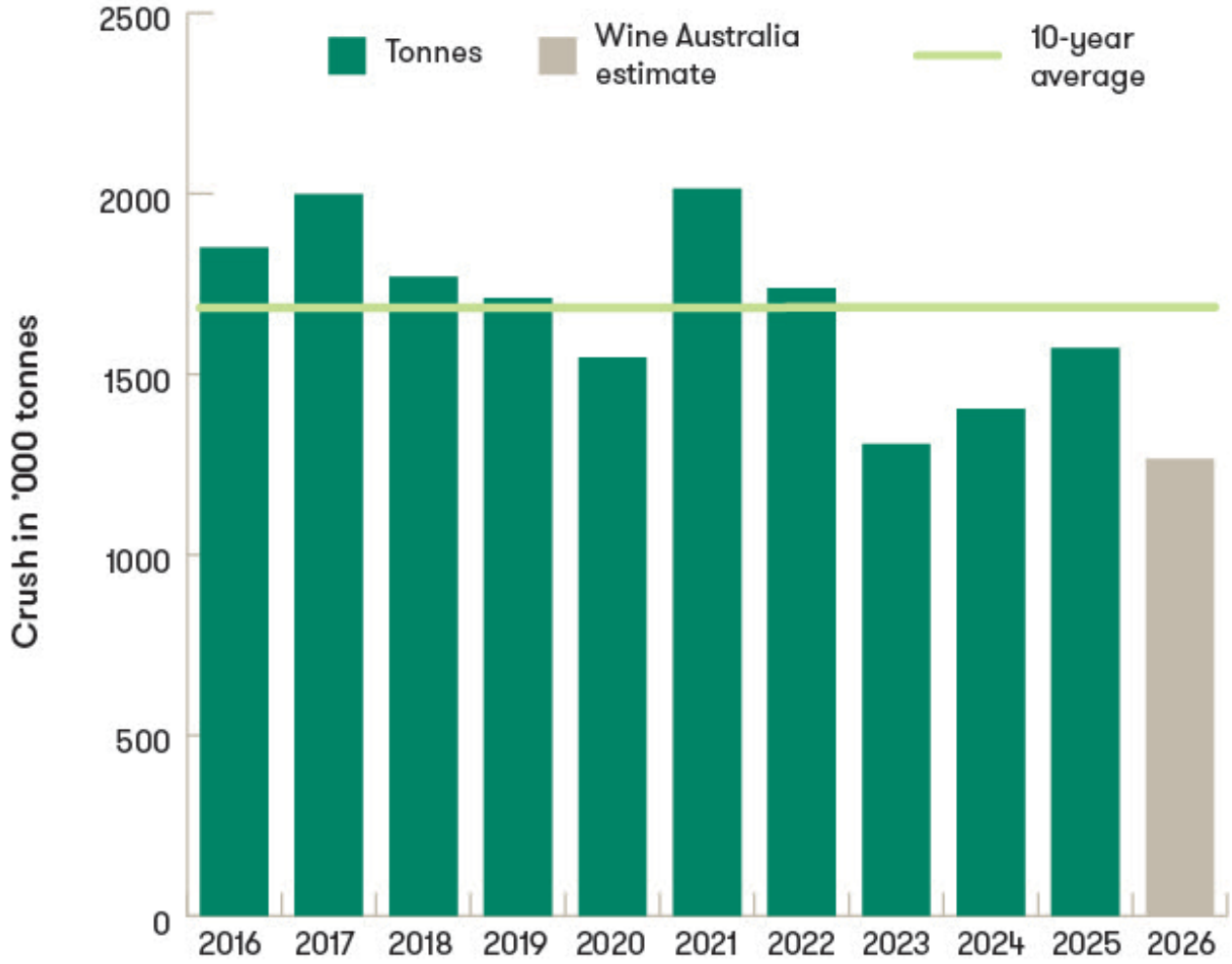
Trends are well established





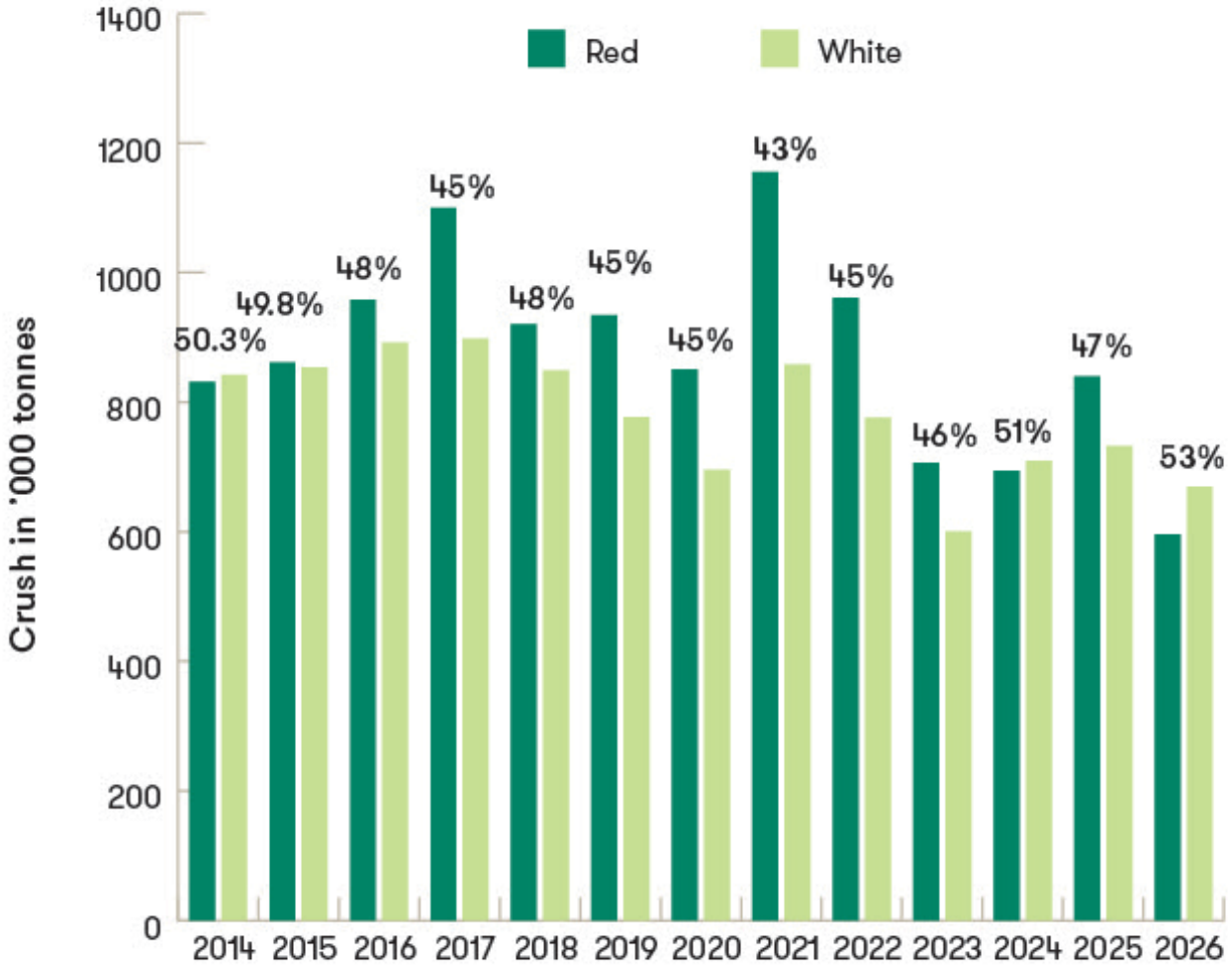
Source: IWSR

Lowest vintage since 2000



Source: Wine Australia

Mix reflecting demand changes



Source: IWSR and Wine Australia

Knowledge is power

- Total area of grapevines in Australia?
- Planting in the past 5 years?
- Removals in the past 2 years?
- What is the estimated (potential) supply of grapes from Australia in 2027?

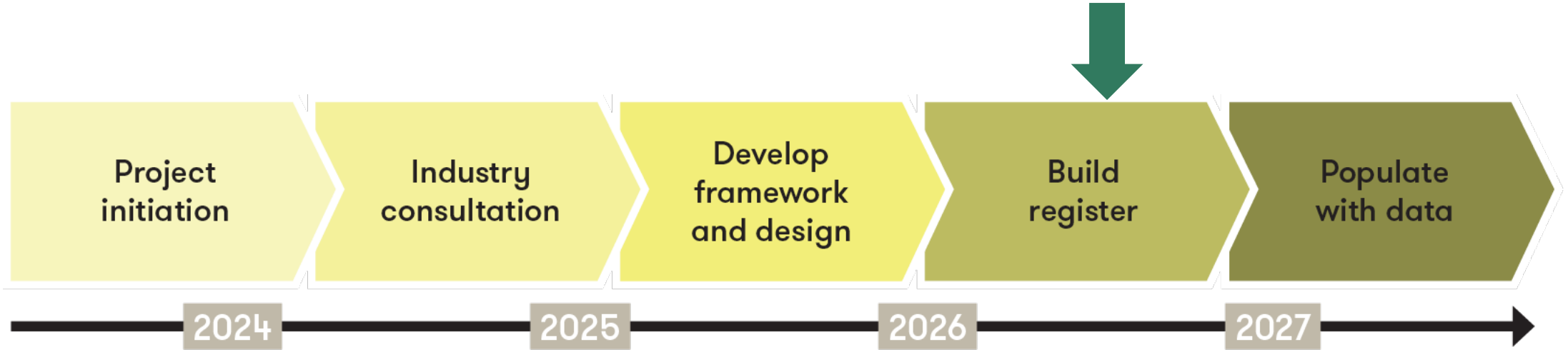


National Vineyard Register (NVR)

- Access to essential foundational information about the wine sector
- Better decision-making around plantings and removals, grape prices and purchasing
- Better matching of supply to demand

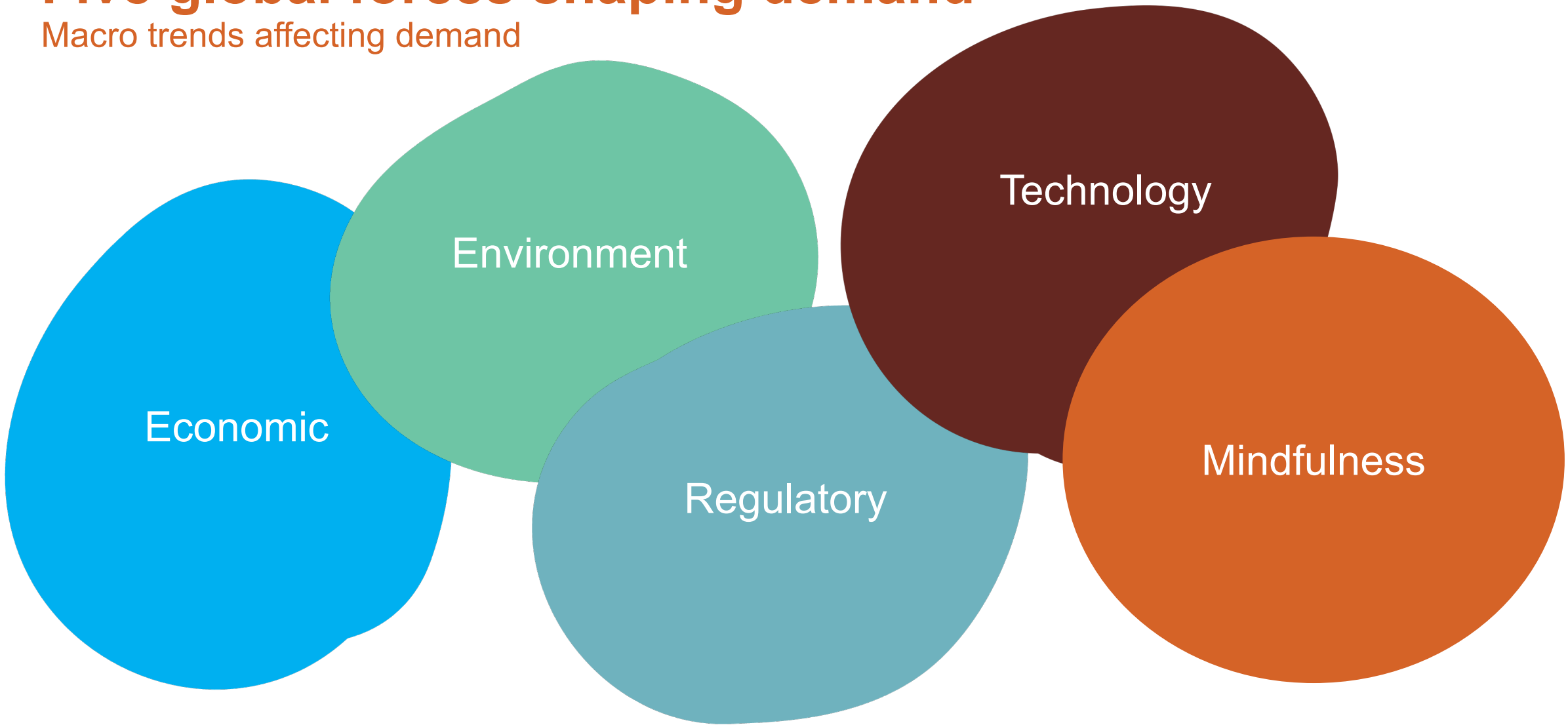


Coming soon…


Project initiation
Industry consultation
Develop framework and design
Build register
Populate with data
2024
2025
2026
2027

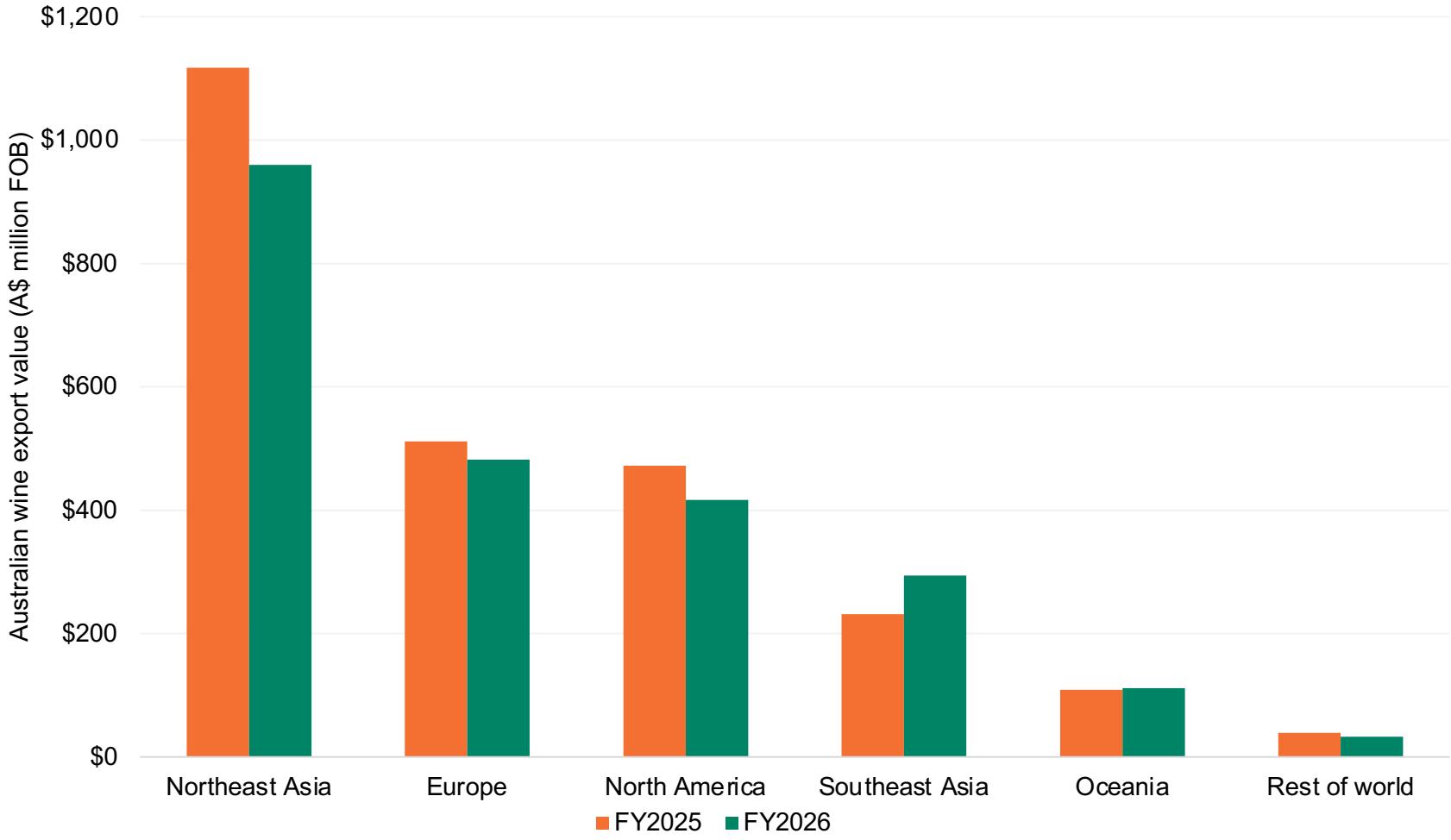
Five global forces shaping demand

Macro trends affecting demand



The devil is in the detail

Value of exports by region



Source: Wine Australia

Behaviour changes present an invitation to innovate

From habitual category loyalty	→	**To repertoire drinking across categories**
From volume-led occasions	→	**To fewer, more intentional occasions**
From technical wine knowledge	→	**To simple quality, taste and occasion cues**
From generic sustainability claims	→	**To proof, transparency and trust**
From traditional retail paths	→	**To digital discovery and recommendations**

Source: Wine Australia

Four strategic imperatives for Australian wine

Move from market access to market creation

Insight:
Access alone is insufficient when global wine consumption is structurally declining and key markets are under pressure.

Strategy:
Prioritise demand generation in markets and/or segments where Australian wine's quality and diversity can be matched to opportunity.



Four strategic imperatives for Australian wine

Build wine relevance with (younger) customers

Insight:
Younger customers are not rejecting wine, but they are rejecting wine's old rules and are increasingly seeking discovery and experimentation first, supported by authenticity and provenance.

Strategy:
Evolve from varietal-first storytelling to incorporate lifestyle, flavour and occasion-based engagement.



Put sustainability into the commercial story

Insight:
Climate volatility is impacting production globally, while climate disclosure regimes will increase pressure for emissions and adaptation data.

Strategy:
Position Australian wine as climate-smart, transparent and regionally adaptive.



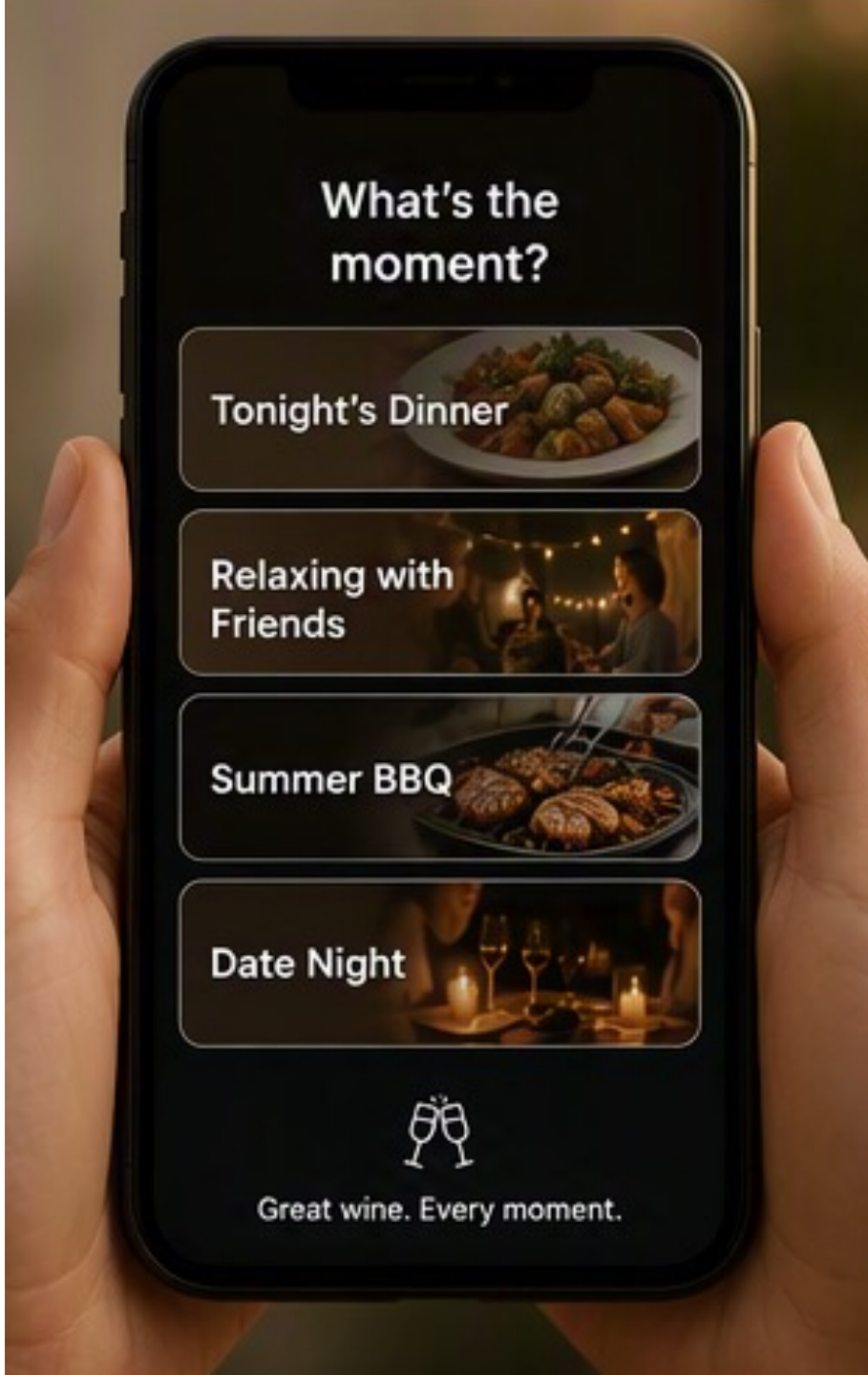
Four strategic imperatives for Australian wine

Occasion rather than production led

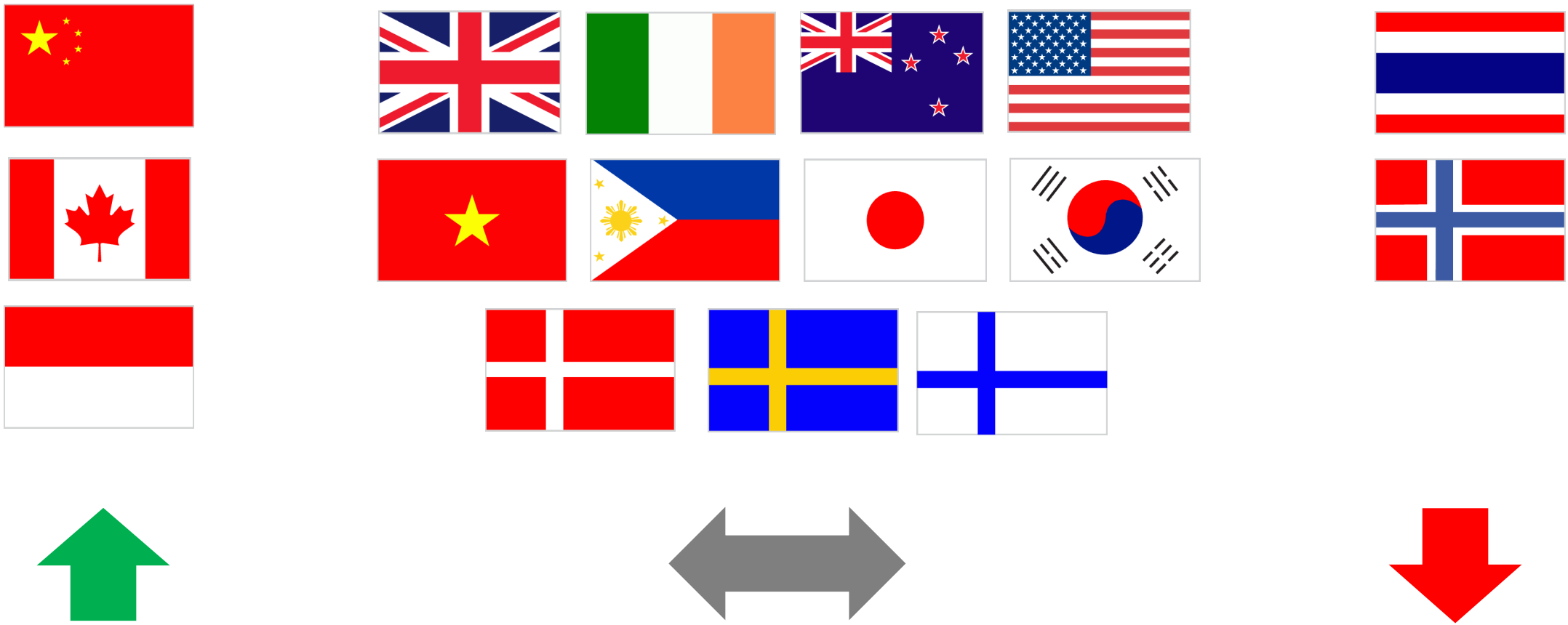
Insight:
Consumption preferences are evolving around occasions, trust and ease of choice.

Strategy:
Make Australian wine easier to choose by linking it to the shared experiences that become the moments that matter:

- Connection
- Celebration
- Moderation



Australia holding share



Source: IWSR

Implications for Australian wine

One Grape & Wine Sector Plan

- Quantify supply
- Build distribution
- Enhance perception
- Leverage sustainability
- Adapt to customer and market opportunity

Wine Australia 5YP 2025–30

- Supply/demand balance
- Insights to unlock market opportunities
- Improve customer relevance
- Leverage sustainability
- Establish key reporting benchmark metrics

FY27 AOP focus

- Insights to impact
- Knowledge transfer
- Market development based on opportunity
- Sustainability as a competitive advantage
- Clear performance measurement

FY27 plans

- Clear portfolio roles with tactics tailored to market
- Activations and communications
- Trade and exporter capability building
- Quantitative and qualitative reporting