Wine Australia

Global market update 2026

UK and Europe update



Laura Jewell MW

Regional General Manager, EMEA



EMEA Market Strategy FY 2027

Strategic Shift Focus

- Focus on shift from volume-led development to value-driven market outcomes in EMEA.

EMEA Market Importance

- Highlighting EMEA's critical role due to market scale and influence in wine media and trade.

Market Challenges & Resilience

- Acknowledges decline in wine consumption due to health and economic factors but premium demand remains strong.

Performance Metrics

- Define success by market share defence, premium growth, trade confidence, and demand creation.

EMEA Alignment with 5 year strategy

Strategic Objectives

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

EMEA's Strategic Role

- EMEA influences global reputation and premium perception through key industry stakeholders and events.

Key Initiatives

- Initiatives like Wine Paris, trade tastings, and WSET partnerships amplify Australia’s wine message globally.

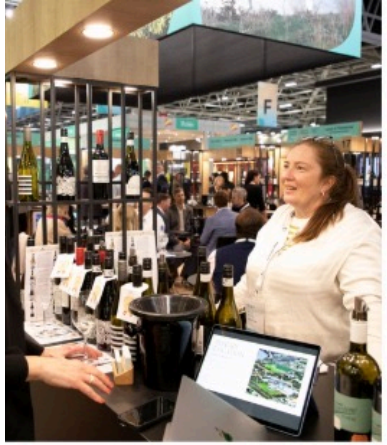
Global Brand Contribution

- EMEA acts as a critical contributor to Australian wine’s global brand strength and value growth ambition.



Wine Paris 2027

- Same footprint as 2026
- 43 wineries signed up so far
- Master classes on stand – open to States, regions and wineries attending – 450 attendees from 30 countries in 2026
- Over 63,000 visitors in 2026
- Over 6,500 exhibitors in 2026
- Austrade team collaboration with business matching
















IMW Symposium Adelaide

- Target 500 attendees
- Open to everyone
- Ticket sales so far to over 37 countries
- 94 MWs signed up
- South Australian Government Hosts
- Wine Australia major sponsor
- Opportunities for sponsorships/attendance at Grand Tasting/product placement at dinners.



Sustainability in Drinks conference Oct 2026

- Showcase wines with trust-mark
- Panel discussions
- Workshops
- Retailer/generic body interaction to look at next 5 years
- Showcase Sustainable Winegrowing Australia progress and next steps
- Present Carbon Reduction Roadmap/benchmark update and Gender Equity Toolkit





UK & Ireland

Defend

Market Significance

- The UK and Ireland are central to Australia's EMEA wine performance, holding strong market shares and leading import positions.

Market Challenges

- Both markets face declining consumption, increased excise taxes, rising costs, and moderation trends impacting sales.

Strategic Objectives

- Focus is on protecting distribution, maintaining visibility, strengthening retailer and on-trade relationships, and driving premium value growth.

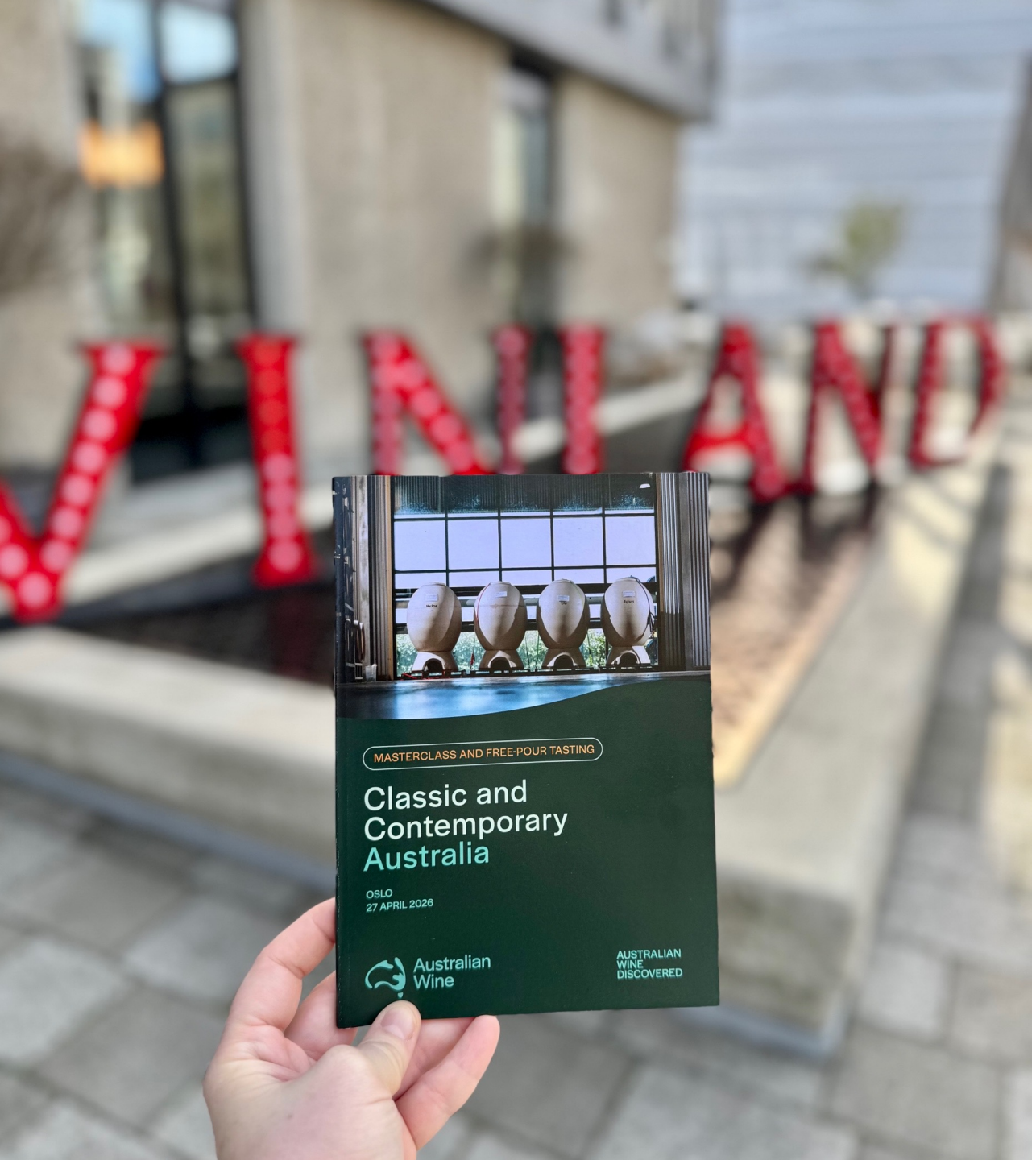
Foundation for Growth

- Success in UK and Ireland markets provides financial and reputational foundation for further investment in EMEA region.

Annual Trade Tastings – London & Edinburgh

- Timing in February prior to Wine Paris
- Over 950 attendees in 2026
- On-trade sommelier focus free pour tasting and competition – in bound visit in November 2026
- Off trade independent retailer free pour tasting 2027





High value European markets

Intensify

Target Markets

- Focus on Sweden, Norway, Finland, Denmark, Germany, Netherlands, and Belgium with premium wine culture.

Market Barriers

- Challenges include sustainability demands, local origin preferences, and outdated views of Australian wine.

FY27 Strategies

- Strategies include MW led trade education, sommelier confidence building, monopoly tender support, and targeted activations in Sweden and Denmark

Premium Segment Repositioning

- Aim to reposition Australian wine in the premium segment and capture share from European competitors.

EU Roadshow September 2026

- Amsterdam – building on 2026 success
- Antwerp – sophisticated wealthy customers
- Warsaw – younger consumers curious about wine
- Mix of wineries seeking distribution and established importers
- Masterclass in each city



















Diversify – building future demand



Emerging Polish Market

Poland shows strong demographic trends and growing wine literacy among younger consumers, signaling future market potential.

Australian Market Share Opportunity

Australia's current share in emerging markets is low, presenting meaningful long-term growth opportunities for wine exports.

Strategic Approach FY27

The FY27 plan focuses on education, distribution recruitment, and regional roadshows with trusted partners to build future demand. Smaller or less strategic markets receive selective support to maintain presence efficiently, e.g. Czechia, Bulgaria and Greece.

Long-Term Growth Focus

Goal is establishing advocacy, awareness, and commercial pathways rather than immediate scale to support export growth.

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, ATTs and inbound MW-led visits.

Share

Defend UK off-trade share (23%); hold or grow AU origin share across the Nordics.

Sustainability

SWA trust-marked wines showcased; monopoly tenders fulfilled on time.

Distribution

Importer and listing wins from the EU Roadshow, Wine Paris and Annual Trade Tastings.

Diversification

Australian presence established and measured in Poland and other new markets.

Perception Change

Increase in favourable perception post education master classes.

Exhibitor Satisfaction

Participating wineries satisfied with events including organisation and communications.

Commercial Potential

High proportion of exhibitors report potential for commercial outcomes as a result of the activity.