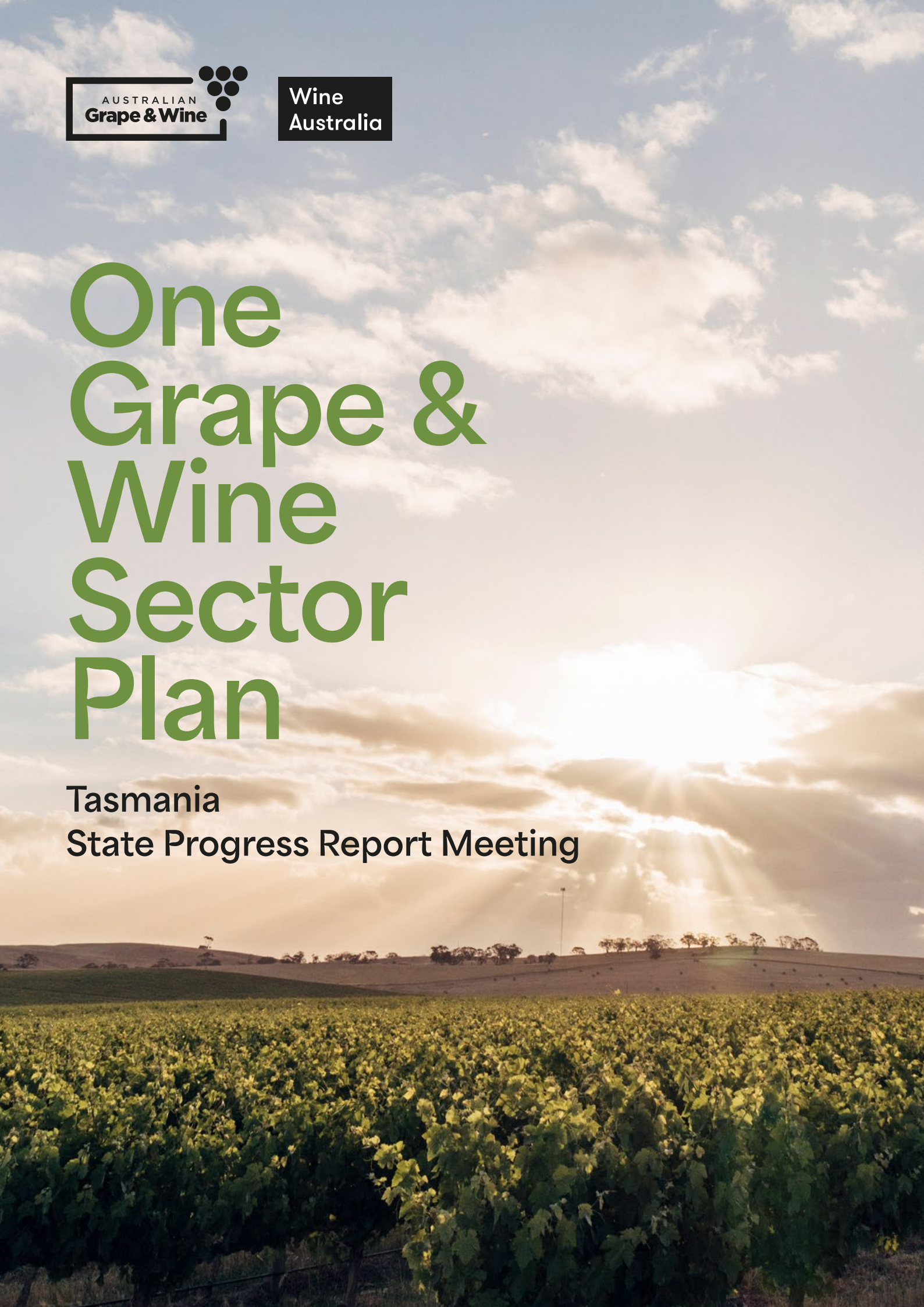
AUSTRALIAN Grape & Wine

Wine Australia

One Grape & Wine Sector Plan

Tasmania
State Progress Report Meeting



Progress and achievements

Balance supply and demand

Plan objective: Determine the true demand position and future-proof Australia's production base.

Australian Grape & Wine has:

- **Advocated for fair and transparent competitive arrangements along the value chain:** Australian Grape & Wine has supported recommendations for government intervention to address structural oversupply in the wine sector. This includes advocating for sensible and balanced policy to ensure commercial dealings are fair and transparent right along the value chain, and calling for greater support for growers who may wish to exit the sector, or transition to other crops in a sustainable way.
- **Been involved in Resolving Competition Issues:** Australian Grape & Wine has been involved in a series of consultations regarding National Competition Policy, with the recent announcement of legislative reform relating to unfair trading practices being a welcomed outcome.
- **Secured $4.6 million in Australian Government funding for Wine Australia:** Through Australian Grape & Wine's advocacy efforts, the Department of Agriculture, Fisheries and Forestry (DAFF) allocated $3.5 million to support initiatives aimed at balancing supply and demand within the wine industry, and an additional $1.1 million to enable Wine Australia to deliver expanded international market access and trade diversification activities, as well as research into new and innovative technologies and tools to control plant pests.
- **Participated in consultations on the Emerson Review:** Australian Grape & Wine engaged extensively with Dr Craig Emerson throughout the consultation process, working to develop a balanced, whole-of-sector position on the review's recommendations to ensure they reflect the diverse interests of grape and wine businesses across Australia.

Wine Australia has:

- **Continued development of a National Vineyard Register:** delivering a framework to DAFF in August 2025 describing the functional requirements and a best practice system architecture that builds in flexibility to ensure the register can support the sector's needs now and into the future. The build phase is about to commence, with a call going out to industry for volunteers to provide input to the platform design.
- **Appointed Dr Craig Emerson to lead an impact analysis of fair trading:** the Emerson report will provide analysis and recommendations of options to improve fair trading, competitive relationships and contracting practices in the wine and grape market. It is expected to be published by DAFF before the end of June 2025.
- **Developed and released a Grape Production Cost Calculator:** to provide an estimate of the costs of grape production in the inland wine regions, based on averages for a region, vineyard size and business model. The calculator can be used to estimate ballpark costs, model different yield scenarios, calculate profitability and for general research purposes.
- Through the **regional program**, Wine Australia supports the annual Wine Tasmania Field Day and Wine Symposium, through providing funding to support venue hire, food and catering and invited speaker travel costs. This allows growers and winemakers to access in-person regionally and nationally recognised research and development insights and information.

Diversify and intensify our international markets

Plan objective: **Engage global markets to increase demand for Australian wine**

Australian Grape & Wine has:

- **Developed a Trade and Market Access Strategy:** Australian Grape & Wine has developed and maintained the industry's Trade & Market Access Strategy which aims to ensure that the Australian grape and wine sector is equipped to respond to customer demand in export markets, by reducing trade barriers and realising substantial and meaningful improvements in market access around the globe.
- **Participated in international collaboration:** Australian Grape & Wine has been leading efforts to collaborate with international partners and forums to improve trade and encourage broader regulatory harmonisation. This has included engagement with India, the World Wine Trade Group (WWTG) and the International Organisation of Vine and Wine (OIV).
- **Advocated for Free Trade Agreements (FTAs):** Australian Grape & Wine has continued to advocate to the Australian Government on the wine industry's interests in its Free Trade Agreement negotiations.
- **Established a Market Diversification Framework:** Under Australian Grape & Wine's previous grant funding, we established a Market Diversification Framework to support diversification and growth efforts. Under this framework, we have successfully supported government investment in our sector to deliver wine specific country managers through Wine Australia in South Korea, Japan and Vietnam as well as further investment in domestic marketing and tourism.
- **Developed the Australia–China Winemaker Immersion Program:** Australian Grape & Wine jointly developed the Australia-China Winemaker Immersion Program in partnership with the China Alcoholic Drinks Association and Treasury Wine Estates. The program strengthens technical exchange, builds industry capability, and fosters collaboration between the Australian and Chinese wine sectors to support long-term engagement and mutual growth.

Wine Australia has:

- **Continued to provide market insights on all established and emerging markets:** through regular communication including sector-wide data and reports, and fortnightly Market Bulletins on market trends and insights. Analysts have presented at events, webinars, workshops and seminars for the sector to provide relevant and targeted information to help inform decision making. The Market Explorer Dashboard has been updated to provide extensive international market data. Supply and demand analysis provided to Wine Tasmania to target export market opportunities.
- **Engaged with the sector to inform market development through the Joint Marketing Group (JMG):** sought input from large, medium and small winemaker representatives, regional representatives and an independent chair, who advise on Wine Australia's planned marketing and promotional activities.
- **Met regularly with the Consumer Insights Advisory Group (CIAG):** A collaborative approach between Wine Australia and Australian wine companies to help establish and provide advice on consumer research priorities and projects, the CIAG is helping develop a research program to provide consumer insights that help Australian wine producers better understand consumer attitudes towards, and usage of, wine, including different styles that may align to different need consumer states and groups.
- **Driven progress in mid-strength product innovation:** Wine Australia has commissioned quantitative and qualitative research to build and scale the market for Australian mid-strength wine across key markets by identifying the most profitable and scalable consumer segments and proposition ideas, and is investing in research on alternative methods to de-alcoholisation for mid-strength wine production.
- **Participated in international collaboration:** working closely with Australian Grape & Wine, Australian Wine Research Institute and Department of Agriculture, Fisheries and Forestry to facilitate and improve trade and market access for Australian wine exporters, including the World Wine Trade Group (WWTG), International Organisation of Vine and Wine (OIV) and FIVS.
- **Promoted Australian Wine in emerging and established markets:** including Australian Wine events such as the China Roadshow, Nordics Roadshow, North American Roadshow, Southeast Asia Roadshow, Australia and New Zealand Trade Tasting UK/Ireland, and a significant Australian Wine presence at key international trade exhibitions ProWine Shanghai, Vinexpo Paris, Vinexpo Asia, and TEXSOM. We have also collaborated with other Australian food sectors, with the Australian Food & Wine Collaboration Group participating in activations in Taiwan, Japan and Malaysia, thanks to government funding secured through Australian Grape & Wine.

- **Showcased the quality and diversity of Australian Wine:** by hosting leading trade delegates from US, UK, Canada, Brazil, Japan, Korea, Sweden and Netherlands in Australia and connecting them to the people, stories and histories of our regions and wines.



Grow our domestic market

Plan objective: Support wineries to grow opportunities in the domestic wine market.

Australian Grape & Wine has:

- **Ensured an industry voice in the Joint Marketing Group:** Australian Grape & Wine actively participates in the Joint Marketing Group, ensuring that industry perspectives are represented in domestic marketing discussions. Through strategic advocacy, Australian Grape & Wine works with Wine Australia in the decision-making processes to shape marketing initiatives and deliver outcomes that align with the sector's needs, supporting long-term growth in the domestic market.
- **Collaborated with Airbnb on "Hidden Vines" Campaign:** Australian Grape & Wine is working with Airbnb on the "Hidden Vines" campaign to promote domestic wine tourism by showcasing 12 lesser-known wine regions across Australia. To maximise impact, Australian Grape & Wine is coordinating with State & Regional Associations and anticipates a significant boost in regional wine tourism and cellar door sales.
- **Secured funding certainty for the Wine Tourism and Cellar Door Grant Program:** Through Australian Grape & Wine's sustained advocacy, the Albanese Government has committed a further $30 million to extend the program for an additional three years. This funding provides certainty for wine producers, supporting cellar door and agritourism initiatives that drive regional employment, attract visitors to Australia's wine regions, and strengthen the economic contribution of the sector.

Wine Australia has:

- **Launched a domestic marketing campaign:** The campaign officially launched to the public on 1 August 2025 with widespread support across the sector and high levels of utilisation of the campaign assets on industry-own social media channels and at point of purchase. Activations across winery, state, regional, retail and on-premise channels highlight the relevance of the campaign messaging and flexibility of the templates. In addition to the free marketing toolkit, industry can submit their local events to the national events calendar which promotes wine experiences across the country to consumers and trade.
- **Developed a domestic market dashboard:** as part of a series of projects aimed at improving market transparency, the new domestic dashboard was launched in June 2025 and contains interactive, always-on access to market and consumer data.



Embrace sustainability

Plan objective: Improve access to Sustainable Winegrowing Australia

Australian Grape & Wine has:

- **Supported the adoption and ongoing development of Sustainable Winegrowing Australia:** Australian Grape & Wine has supported the adoption of Sustainable Winegrowing Australia, a program that provides a framework for environmental best practices. Australian Grape & Wine is now working with the Australian Wine Research Institute and Wine Australia to review the program's governance arrangements to ensure it remains fit for purpose and sustainable into the future.
- **Implemented Environmental Stewardship Initiatives:** Australian Grape & Wine has implemented initiatives to reduce the carbon footprint of wine production, including energy efficiency programs and waste reduction strategies.
- **Accessed an Emissions Traceability Grant:** Australian Grape & Wine was successful in a grant application for a project 'Tracing Carbon Emissions in an International Wine Industry Value Chain between Australia and Singapore'. The project will see the development of a comprehensive carbon emissions tracking system and data-sharing platform aimed at enhancing provenance and building trust in Australian exports.

- **Secured funding to support the Australian Wine Industry Technical Conference:** Through Australian Grape & Wine's advocacy, $550,000 in Australian Government grant funding has been secured for the Australian Wine Research Institute to expand the scale and reach of the Australian Wine Industry Technical Conference in 2025 and 2028. This investment will strengthen the sector's focus on sustainable production, innovation, and knowledge sharing across the grape and wine community.

Wine Australia has:

- **Promoted the success and value of Sustainable Winegrowing Australia (SWA):** including to international trade and consumers, by promoting SWA as a key point of difference to market competitors at in-market events in UK, Europe, US, Japan.
- **Reviewed SWA against global competitor programs:** engaged international retailers, National Farmers Federation and the Sustainable Wine Roundtable (SWR) to ensure that SWA meets current market requirements and sustainability frameworks, is fit-for-purpose and responsive to rapidly evolving ESG obligations. This includes a review of SWA against seven other wine sustainability standards and the SWR Global Reference Framework.
- **Progressed sustainable solutions for disposal of CCA-treated vineyard posts:** including investment in the Timber Circularity Project to determine regional volume and mass of CCA posts, regulatory and logistical barriers to collection, reuse and end-of-life processing. Pilots to demonstrate end-of-life processing options are being developed. Other initiatives include an investigation to examine the feasibility of regional collection sites, a product stewardship model for end-of-life management of CCA treated timber, and a 'store safely' campaign.
- **Supported the development of low emissions alternative packaging options:** by securing $600,000 in funding through the Federal Government Business Research and Innovation Initiative (BRII) grants – Renewables and Low Emissions Round. Six companies have been awarded grants to test their innovative packaging solutions for premium Australian wine, with a further $1 million available in FY25/26 for up to two grant recipients each in FY26 to take their products to market.
- **Secured Federal Government grant funding for emissions management:** to explore gaps in grower and winemaker understanding of emissions management across the sector and opportunities to co-invest in cross-agricultural emissions management solutions.
- **Provided ESG education for the sector:** including workshops and presentations on measurement and reduction of greenhouse gas emissions
- **Designed resources to help businesses be more sustainable:** including the update of the AWRI Australian Carbon Calculator, to help producers measure emissions data with calculations from the Environmental Accounting Platform (EAP); sustainability communications and reporting guides to help businesses respond to retailer requests for information and promote their sustainability credentials; and an ESG Readiness Tool, helping producers to understand ESG topics and the evidence and reporting needs relevant to their business. All resources will be available by July 2025.
- **Co-investment with regional associations:** to drive the uptake of SWA and achieve regional program priorities.
- **Supported the Wine Tasmania greenhouse gas emissions online webinar** in May 2025, with Julian Marchant delivering information related to the Australian Wine Sector Emissions Reduction Roadmap.
- **Regional program:** Funding from the regional program is used every year to operationalise the grower Field Day and Wine Symposium. Money from Wine Australia allows for sourcing and travel of speakers to Tasmania, facilitating information transfer between practitioners, researchers and knowledge brokers.
  - Supported Wine Tasmania emissions reduction workshops and presentations and the continued uptake of the Vin0 program. Wine Australia staff have played a role in bridging the gap between retailer sustainability requirements and Tassie growers and winemakers actions to support sustainability.
  - Provided information and case studies of carbon farming opportunities, costs, benefits and the options that offer the greatest financial return to growers.
  - The filming, editing and delivery of a promotional video showcasing the benefit of emissions management for Tasmanian grape and wine business.
  - Funded research and partnership with developers and suppliers of Agtech for improving grapegrowing and winemaking processes in Tasmania.
  - A two-year trial and demonstration of three technologies (Swan Systems, Wildeye and Airborne Logic) at Tasmania's Josef Chromy to improve drought resilience and water efficiency. The trial has been further highlighted and leveraged by the Tasmanian Institute of Agriculture into other Tasmanian drought related projects. Kellie Graham from Josef Chromy was a keynote speaker at the Australian Wine Industry Technical Conference in 2025 sharing her experiences with the national wine community.

- **Supported and funded work focused on biosecurity** for the quality and safety of the Australian wine sector, and specifically in Tasmania
  - National biosecurity and pest management programs are helping Tasmania stay ahead of major pest and disease risks. They build stronger diagnostic capability, support sustainable production, and ensure Tasmania remains a leader in clean, high-quality wine and horticultural production.
  - Biosecurity Trakka – National Diagnostic Capability and Data Sharing – NRE Tasmania is an active partner, ensuring Tasmanian labs can use the new systems and benefit from national training and data access. This will boost Tasmania's ability to quickly detect and respond to pests like Xylella fastidiosa and phylloxera.
  - Xylella fastidiosa Preparedness – strengthening Tasmania's readiness for a potential incursion and ensures alignment with national response plans. Resistant grapevine varieties and improved contingency plans will help protect Tasmanian vineyards and nurseries.
  - Phylloxera Management and Diagnostic Advancements – Tasmanian diagnostic staff are being trained to use the new tests, supporting fast local detection and response. Wine Tasmania's Paul Smart has contributed to the new National Phylloxera Risk Assessment, which will guide updates to the national management plan.
  - Scale Insects Research and Management – Tasmania is part of the national sampling program, helping build local knowledge of scale species and their natural enemies to guide future management.



Defend wine's social licence

Plan objective: **Defend wine's social licence in public health debate with anti-alcohol lobby**

Australian Grape & Wine has:

- **Alcohol and health working group:** Alcohol Beverages Australia (ABA) has established a new Alcohol and Health Working Group, with Australian Grape & Wine as an active member. The group will initially focus on health warning labels and draw on international resources, such as those from the International Alliance for Responsible Drinking (IARD). Its work will include developing a comprehensive evidence base—covering health, economic, and social dimensions—reviewing international approaches, identifying key risks, and preparing for the possibility of rapid policy shifts by government. The group will also collate and analyse scientific evidence, highlight weaknesses in opposing arguments, and engage supportive experts. Additional research may be commissioned to strengthen the industry's position, which will then inform AGW's strategic approach and communications.
- **Talking point toolkit:** Australian Grape & Wine is working with Alcohol Beverages Australia (ABA) to develop a talking point toolkit containing resources for members regarding alcohol and health.
- **Parliamentary Friends of Viticulture:** Australian Grape & Wine actively engages with the Parliamentary Friends of Viticulture group as a valuable forum to defend and strengthen the wine sector's social licence. By bringing together Members of Parliament in a more relaxed and informal setting, we're able to have constructive conversations about the industry's initiatives, including sustainability, responsible consumption, regional economic contributions, and export growth. These engagements help build understanding and support across the political spectrum, reinforcing the value of the Australian wine sector to communities and the nation.
- **Responsible Marketing & Promotion of ABAC:** Australian Grape & Wine actively promotes the Alcohol Beverages Advertising Code (ABAC) to ensure industry compliance and uphold responsible marketing standards. Through collaboration with ABAC, Australian Grape & Wine educates members on best practices, reinforcing the importance of ethical promotion and responsible alcohol advertising.
- **Collaboration with DrinkWise – 'Stay Tasteful While Tasting' Campaign:** Australian Grape & Wine has partnered with DrinkWise to promote responsible consumption through the 'Stay Tasteful While Tasting' initiative. This campaign encourages moderation and responsible behaviour at wine tastings and cellar doors, reinforcing positive industry messaging.
- **Industry Engagement:** Australian Grape & Wine has engaged with regional wine communities to highlight the cultural and economic contributions of the wine industry, fostering positive relationships and trust. As part of these efforts, Australian Grape & Wine delivered essential information on social licence at the Finlaysons Wine Roadshow, underscoring our advocacy and industry actions to combat anti-alcohol rhetoric and protect the sector's reputation.

Fit for purpose levy system

Plan objective: Ensure that the sector's national funding models are fit for purpose

Australian Grape & Wine has:

- **Initiated a Levy System Review:** Australian Grape & Wine has initiated a comprehensive review of the existing levy system, consulting with stakeholders to ensure it supports industry growth and sustainability.
- **Advocated for the scrapping of the Biosecurity Protection Levy:** Australian Grape & Wine's strong advocacy and lobbying efforts, in conjunction with other agriculture sector bodies, helped deliver a significant win for the wine sector, with the Federal Government abandoning its proposed Biosecurity Protection Levy. We worked tirelessly to ensure the voices of grape growers and winemakers were heard, highlighting the unfair burden the levy would have placed on our industry.

Our People

People Development and leadership in Tasmania

Wine Australia has:

- **Supported the future Leader of Tasmania**, with alumni including:
  - Dave Milne, National Sales Manager – Wholesale Endeavour Group, Future Leaders 2015
  - Keira O'Brien, Winemaker, Rivulet Wine, Future Leaders 2019
  - Matt Pooley, Pooley Wines Wholesale Manager-Tasmania & Viticulturist, Nuffield 2013
- **Funded the Next Crop Tasmania program 2023:** Developing regional engagement and leadership skills for Tasmania, with alumni including:
  - Abbie Hoskin (Bellebonne), Alex Travers (Craigie Knowe), Vanessa Dunbabin (Bangor Vineyard), Ben Pearson (Swinging Gate), Ben Pietsch (Brown Family Wine Group), Bryn Williams (Stargazer), Cameron Walker (Hill Smith Family Estates), Cecilia Hakansson (Moorilla & Domaine A), Cynthea Semmens (Marions), Frieda Henskens (Henskens Rankin), Hugh McCullough (Wellington & Wolfe), Izaak Perkins (Ghost Rock), Jamie Cowen (Tertini Wines), John Schuts (Derwent Estate), Karen Davis (Holm Oak), Kellie Graham (Josef Chromy), Matt Dunbabin (Bangor Vineyard), Mitchell Kenney (Dalness Farming), Nick Glaetzer (Glaetzer-Dixon), Penny Jones (Bay of Fires), Rafe Nottage (Bream Creek), Robert Stewart (Small Wonder), Sierra Blair (Ghost Rock), Tess Astbury (Wine Tasmania), Cam Walker, Vanessa Dunbabin and Cecilia Hakansson
- **Supported the Tasmanian 2025 leadership program** following the Next Crop Tasmania program in 2023
- **Funded the national expansion of the Rootlings program** with inclusion for Tasmania
  - State champions: Mia McIntyre, Area Business Manager at Joval Wines and Brent Harris, Vineyard Operator at Jansz
  - The first casual 'Monthly Decant' took place recently at Caledon Estate.
  - Planning is in place for the first Tas Field Day on December 7 in Huon

Wine Australia

Market Insights

Tasmania

Crush

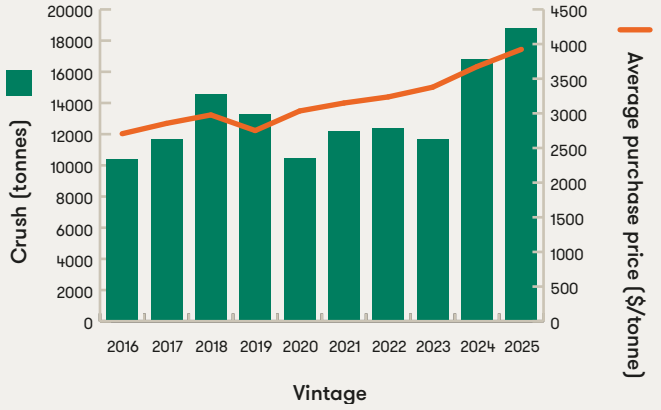


Share of Australian crush by volume **1.2%**

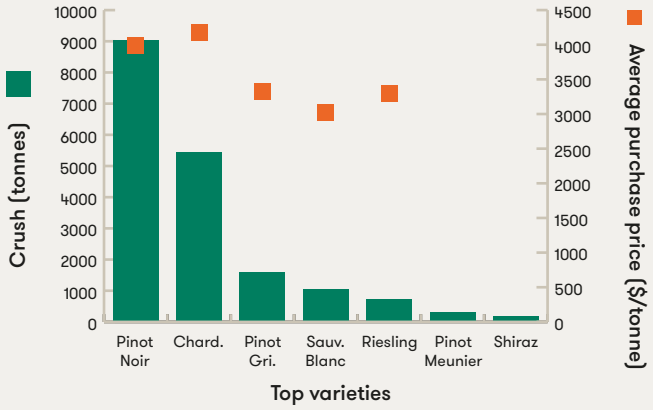


Share of Australian crush by value **6.5%**

Tonnes and average value



Top varieties in 2025



Exports

12 months ended September 2025, based on regional label claims

Total value	$9.2m ▲ 59%
Total volume	0.4m litres ▲ 30%
Average value	$26.21/litre ▲ 23%

Price point by value

$30.00 +	$5.3m ▲	166%
$20.00–$29.99	$1.4m ▲	42%
$15.00–$19.99	$1.5m ▼	-23%
$10.00–$14.99	$1.0m ▲	22%
< $10.00	$0.01m ▼	-43%

Top 5 markets by value

Mainland China	$2.3m ▲	++
United Kingdom	$1.6m ▼	-2%
United States	$1.2m ▲	9%
Singapore	$0.6m ▲	17%
Hong Kong	$0.5m ▲	115%

Market Insights resources

Market Explorer

The Market Explorer assists Australian wine exporters and winegrape levy-payers to explore new markets by providing data to make informed business decisions. The resource can help determine which market is the most attractive to an Australian wine business.

→ wineaustralia.com/market-insights/market-explorer-tool

Free on Board (FOB) to Retail Calculator

The FOB to Retail Calculator allows users to calculate what the bottle price will be on shelf (the RRP) in international markets for a given FOB value, and assess and evaluate competitors in market through price point comparison.

→ wineaustralia.com/market-insights/fob-to-retail-calculator/

Export Dashboard

The Export Dashboard provides interactive and comprehensive data and insights on Australian wine exports back to 2015. It provides headline figures for the latest release of data, and detailed statistics on wine exports by destination market, GI claim, variety, wine style, container type and exporter size.

→ marketexplorer.wineaustralia.com/export-dashboard

National Vintage Survey Dashboard

A one-stop-shop for Australia's vintage crush data from 2015 to the latest report, providing vintage crush figures by volume and value, detailed tables on crush by variety and region and more.

→ marketexplorer.wineaustralia.com/vintage-survey