



Australian Wine:  
Regional, Sustainable, Essential.  
The value of the Australian  
wine industry and its contribution  
to the national economy.

# Australian Wine: Regional, Sustainable, Essential.

The value of the Australian wine industry and its  
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## History

The wine industry makes a unique and powerful contribution to the Australian economy every year.

Australia's national wine industry has evolved almost beyond recognition over the last two decades, from a backyard business focussed mainly on domestic consumption, to ranking as the number one exporter in the world's largest wine import market.

The industry was built on its ability to supply large quantities of high-quality, consumer-friendly, approachably-marketed product. Australia took the wine world by storm.

But behind the scenes, the Australian wine industry has been through turbulent times over the last 15 years. First, as demand escalated, plantings expanded exponentially and exports boomed for almost a decade, times were very good indeed.

But then the inevitable hangover followed: the industry was flooded with excess stock, wine prices fell, grape prices fell, and the international market became significantly tougher. A depression followed that has now lasted about five years: it was no secret that until recently the wine industry was in something of an oversupply situation, as cleanskin wines lined the shelves for as little as a dollar a bottle. However there are signs that this situation is nearing an end, as modest increases in grape prices are breeding renewed optimism in the sector.

## Here and now

The Australian wine industry is now a global success story, but at the same time the competitive structure of the world wine market has moved on. There has been a realisation that the wine industry needs to evolve in the same way if Australia is to maintain its competitive edge.

Consequently, last year the Australian industry pulled together to form a new strategy, *Directions to 2025*, which features a groundbreaking marketing strategy and clearly spells out the need for a focus on sustainability – economic sustainability, environmental sustainability, and social sustainability.

The strategy has been designed to ensure the best security for the future of the Australian wine industry through sustainable economic and environmental performance, technological innovation and social responsibility. The *Directions* strategy has been rolled out across domestic and international markets and has already seen significant uptake by overseas supply chain partners.

Unlike other alcohol beverage production industries, wine is a regionally-based agricultural product, grown in rural areas all over Australia, by companies ranging from large multinational corporations to small family businesses.

“Australia took  
the wine world  
by storm”



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# Global

# Perspective

Australia has been climbing the world rankings in terms of wine production. From eighth place in global wine production in 1999, with 851 million litres, Australia has surpassed South Africa and Germany to sixth place in 2005 with 1.4 million litres. (latest international data available, Global Wine Statistical Compendium via AWBC Winefacts)

In terms of exports, Australia has also been climbing the global chart. In 1999 Australia was responsible for just 3.7% of world wine exports by volume, but by 2005 this figure had risen to 8.7%, placing us fourth behind only the European powerhouses of Italy, France and Spain.

Our share of world exports by value is more impressive still, rising from 5.3% to 10.4% to overtake Spain, making Australia the third most valuable wine exporter in the world.



## Value share of world wine exports (%)

		1999	2002	2005
1	France	42.4	38.2	34.0
2	Italy	18.1	18.5	18.0
<b>3</b>	<b>Australia</b>	<b>5.3</b>	<b>8.7</b>	<b>10.4</b>
4	Spain	10.1	9.1	9.3
5	Chile	3.7	4.3	4.3
6	Germany	3.1	2.8	3.3
7	USA	3.6	3.6	3.0
8	South Africa	1.4	2.2	2.9
9	Portugal	3.6	3.4	2.8
10	New Zealand	0.5	0.9	1.6

Source: Global Wine Statistical Compendium via AWBC Winefacts

“making Australia the third most valuable wine exporter in the world”



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# Australian

# Production

The total bearing area of vines in Australia now stands at slightly under 164,000ha. New vine plantings have slowed considerably since the boom times of the 1990s and early 2000s, growing by just 3.7% last year. Total winegrape production for the 2007 vintage came in at 1.37 million tonnes, with average grape yield across all Australian regions of 9.3 tonnes per hectare. (ABS data) Overall tonnages were down 23% on the 2006 harvest of 1.8 million tonnes (AWBC), however this was a higher figure than many expected from the badly frost and drought-affected growing season.

Since 1990, beverage wine production in Australia has grown from under 400 million litres to over 1.4 billion litres in 2006, hitting the 1 billion litre mark in 2000. However the 2007 harvest, was down by 31.8% to just under 1 billion litres. For many the lower harvest also helped to assuage a high-stock situation that was being felt as a result of recent large harvests, as stock inventories fell 15.3% to 1.78 billion litres in 2007. (ABS Data)

“the lower harvest helped to assuage a high-stock situation”

At the time of writing, the 2008 harvest is expected to come in slightly higher than last year, estimated between 1.55-1.65 million tonnes (AWBC). While this is still significantly down on the recent large harvests in 2004, 2005 and 2006 of around 1.9 million tonnes, it is widely considered to be a more sustainable figure for the future of the Australian industry as a whole. The more moderate harvests provide an opportunity for producers to build value back into their margins while also satisfying domestic and international demand.



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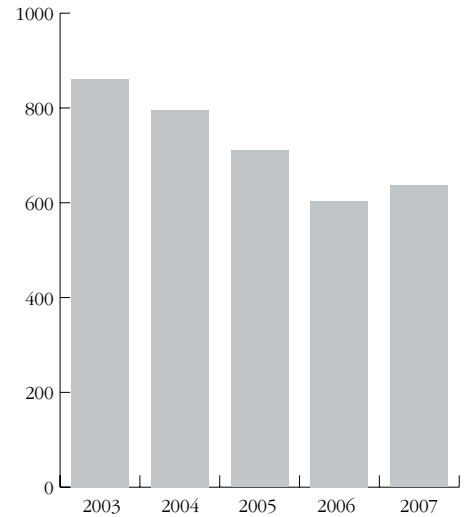
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# Grape Prices

Average grape prices in most areas showed a slight rise last year, with a 5% increase in the overall Australian average for all varieties. By state, South Australian prices were the strongest in 2007 with a 9% rise to a state all-varieties average of \$730 per tonne. Inland regional areas, which produce the vast majority of the crush, have lower average prices overall, however prices in the Riverina growing region still rose by 6% to an all-varieties average of \$398 per tonne. Riverland fruit sold for an average of \$385 per tonne, representing a rise of just 2% in this region.

By variety, red grapes fared better than white in terms of prices, rising 9% to a country-wide average of \$713 per tonne, with white rising just 4% to \$566 per tonne. Shiraz prices overall remained strong with an average rise of 3% to \$739 per tonne. Pinot Noir however was much more in demand with prices rising 22% to \$1253 per tonne. Sauvignon Blanc prices also performed well, rising 8% to \$1140 per tonne, while the price paid for Chardonnay fell 1% to \$539 per tonne on average. (National Winegrape Crush & Price Report)

Average grape prices \$/Tonne



Source: National Winegrape Crush & Price Report

“Pinot Noir,  
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# Domestic

# Wine Consumption

The average Australian household spent \$6.33 a week on wine in 2003-04, compared to \$9.25 on beer and \$4.28 on spirits. Per capita consumption has been steadily on the rise, from 26 litres per capita in 2000 (by persons 15 years and over, ABS data) to 28 litres in 2006.

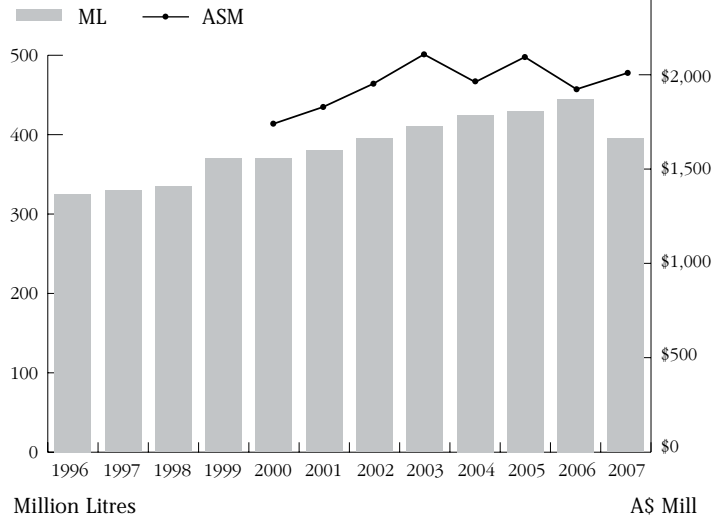
Total domestic wines sales have grown from 369.3 million litres in 2000 to 447.8 million litres in 2007. There has been a slight shift from white to red wine sales, with reds climbing from 31% to 36% of sales. Sparkling wine has grown in line with overall consumption and maintained about 9% of sales, while fortified wine has fallen in popularity from 6% to 4% of total domestic sales. (AWBC)

However, domestic sales volumes have eased recently as consumers are responding to rising interest rates and cheaper imports from a stronger Australian dollar.



“Per capita consumption has been steadily on the rise”

Domestic Sales of Australian Wine



Source: AWBC



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# Imports

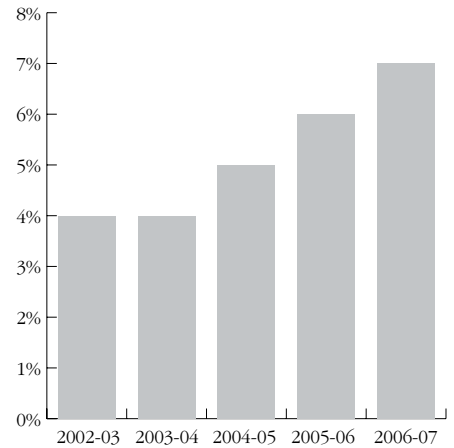
On a global scale, Australia is a minor importer of wine, bringing in just 0.4% of world wine imports by volume. (Global Wine Statistical Compendium via AWBC Winefacts) However our taste for imported wine has been growing overall. Australia imported over 34 million litres of wine in total in the year 2006-2007, up 75% on the 19.6 million litres imported in 1999-2000.

There has been a marked swing in the import of red and white wine. White wine, which made up just 19% of wine imports in 1999-2000, now holds the majority at 55% of wine imports. Red wine imports have consequently fallen from 47% to 19% of imported wine.

Sparkling wine imports have increased in line with this growth, and have more than doubled from 3.8 million litres to 7 million litres to make up around 21% of the import mix. Recent drought conditions that have cut back on the plentiful supply of inexpensive wine in Australia are expected to result in an increase in imports to fill the lower price points.

A strong recent trend in imports has been Sauvignon Blanc from New Zealand. Imports of New Zealand wine have grown radically from 3.1 million litres in 2000 to 18.1 million litres in 2007, with a high average unit value of \$8.59.

## Imports as a percentage of total domestic sales



Source: ABS 8504.0 Sales of Australian wine.

“Imports of New Zealand wine have grown radically”



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# Exports

Approximately 64% of Australian wine production is exported, with 36% sold domestically.

The success of the modern Australian wine industry was founded on an export boom. In the 1990s, wine put Australia on the map in terms of culture and tourism for many overseas countries and is now a large part of Australia's international identity. On any given day, there are now more than 2 million bottles of Australian wine being opened in households and restaurants in over 60 countries worldwide.

To maintain the integrity of Australia's reputation for quality overseas, every wine is tasted and analysed before it leaves Australian shores, and the year 2006-2007 was another record 12 months for Australian exports. At the end of June 2007, there were 1,730 licensed wine exporters in Australia – an increase of 9.7% over the previous year – and a staggering total of 18,169 samples were submitted for evaluation. (AWBC)

In the financial year 1980-1981, Australian wine exports totalled just \$11.7 million, but had reached \$97.1 million by 1987-1988. In the 20 years since, the industry has grown exponentially, with export revenue reaching \$2.75 billion in 2005, \$2.8 billion in 2006 and just under \$3 billion in the 2006-2007 financial year.

In the 12 months to March 2008, 49% of exports were made up of bottled red wine, bottled white wine made up a quarter of exports, and bulk red and white accounted for 14% and 9% respectively.

Latest figures show that bulk shipments have in fact been slowing in favour of bottled shipments, with dollar per litre values rising accordingly. Bulk shipments reached record levels in recent years as four large vintages in 2002, 2004, 2005 and 2006 created a bountiful supply of inexpensive wine that was selling on overseas markets for as little as \$1 per litre. However bulk red sales fell by 27% in volume in the year to March 2008, with values back up to an average of \$1.20 per litre.



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# Exports

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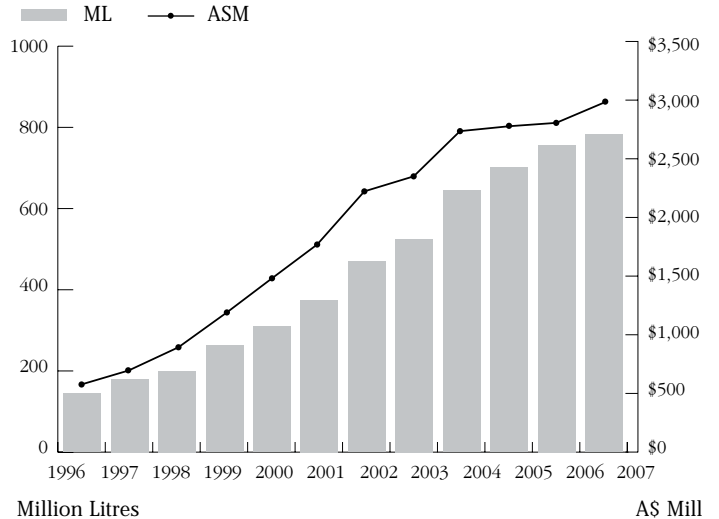
By price point overall there has been a shift towards higher value exports. Exports in the \$7.50 - \$9.99 category have grown by 18% (MAT March 2008, AWBC), while sales in the <\$2.50 category fell by 17% over the same period.

The UK remains Australia's major export destination, taking 33% of wine exports worth \$936 million. The USA is next in line, with 29% of exports worth over \$834 million. New Zealand, our largest export destination by far in the early 1980s, now takes just 3% of exported Australian wine, although it remains our fourth most important export destination. Asian markets represent the biggest growth area for Australian exporters, with China in particular showing stratospheric growth in recent years. Although China is currently ninth in the export destinations chart, growth of 17% in value (MAT March 2008, AWBC) is consolidating Australia's previous high-volume / low-value position in this market making this likely to become one of our most significant export destinations for the future.

The wine industry has been instrumental in arranging trade agreements with many export destinations, including major trading partners such as New Zealand, the USA and Canada.

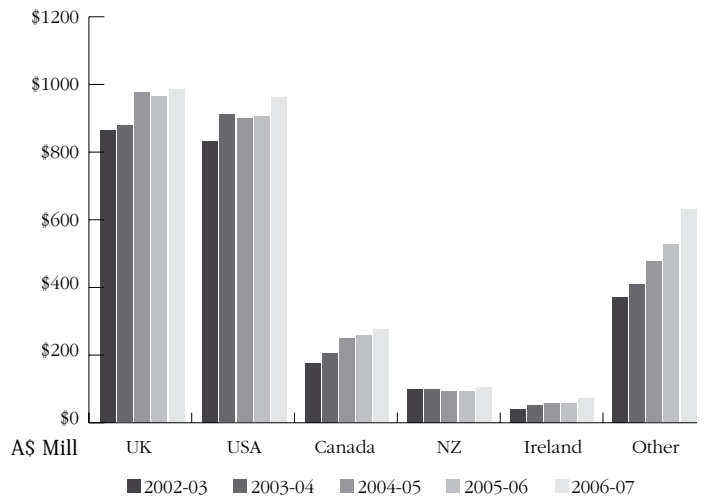


## Australian Wine Exports



Source: AWBC

## Major export destinations for Australian wine.



Source: AWBC export approval data



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# Regional Australia

South Australia is the country's largest wine grape-producing state, by a significant margin at 583,340 tonnes in 2007, with New South Wales next on the list at 402,777 tonnes and Victoria producing 308,501 tonnes. Western Australian vineyards produced 68,252 tonnes of wine grapes, and the much lower volume states of Tasmania and Queensland produced 5,058 and 2,205 tonnes respectively. (AWBC)

With over 60 different wine regions, rural areas are the foundation of the wine industry in Australia. The Riverland (South Australia), Murray Valley (Vic/NSW) and Riverina (NSW), between them produce almost 65% of Australia's winegrape harvest.

As rising demand drives the continued expansion of the wine sector, investment in the wine industry provides a sustainable future for these rural economies. Regional communities all over the country have been involved in grape growing and winemaking for generations, and rely on the wine sector as a major employer.

# Varietal Australia

Shiraz remains Australia's most planted grape variety, with 43,417ha in the ground. Chardonnay is next with 32,151ha, but red grapes still hold the majority with 100,623ha planted compared to white grapes' 73,153ha.

However there is in fact a noticeable movement back to white grapes as a whole, with net plantings of white varieties at 870ha in 2007, and net plantings of red grapes at -393ha. Sauvignon Blanc was Australia's most planted variety last year, with a net 454ha going into the ground, and Pinot Gris was a close second with 410ha. There has been a move among Australian wine producers to lighter, more elegant styles, and this growing interest is reflected in the plantings of more aromatic varieties, with both Viognier (67ha) and Pinot Noir (71ha) recording good net plantings last year. (ABS Data)



“Rural areas are the foundation  
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# Small, medium & large Business

There has been considerable consolidation in the international and Australian wine and beverage industry in recent years, most notably between large corporations, although smaller companies have also been affected. The top 22 companies in Australia now account for approximately 90% of total wine sales.

However the Australian wine industry remains founded on smaller companies, the number of which continues to grow. Of the 2,299 wineries in Australia, 1,999 crush less than 500 tonnes. A further 203 crush 500-10,000 tonnes, but just 35 crush over the 10,000 tonne mark.

Number of wine producers by tonnes crushed

tonnes	2002	2003	2004	2005	2006	2007	2008
Less than 50	749	866	996	1028	1082	1185	1280
50 to 99	212	230	254	288	303	322	330
100 to 249	189	199	211	229	242	235	243
250 to 499	88	103	106	111	126	133	146
500 to 999	61	57	72	76	74	73	74
1,000 to 2,499	54	56	45	55	69	70	67
2,500 to 4,999	36	36	40	33	27	30	36
5,000 to 9,999	23	27	24	29	28	26	26
10,000 or more	41	43	43	41	41	33	35
Unknown	12	8	7	9	16	40	62

Source: Data from The Australian & New Zealand Wine Industry Directory, 2008



## Education

Australia is home to some of the world's most respected wine universities and colleges – and yet the industry is still growing at a rate that threatens a shortage of qualified wine industry professionals if recruitment is not increased. In recognising this potential shortcoming, the wine sector formed a Workforce Development Committee in 2006, which has been working to engage government on policy and strategy in terms of ensuring that there are enough skilled workers in place to service the growing industry.

The major challenges faced by the wine industry in terms of future employment needs are the continuing changes to the skills set required as technology in the sector moves forward, and the ageing population of the workforce as a whole.

In 2004, Australia had a total of 1881 students in wine-related subjects including viticulture, winemaking and wine marketing. This is more than double the 1994 total of 739 students. (DEST, 2005) The wine industry is working to actively engage young people in the wine industry, with secondary schools in some wine regions now offering winemaking as an HSC qualification.



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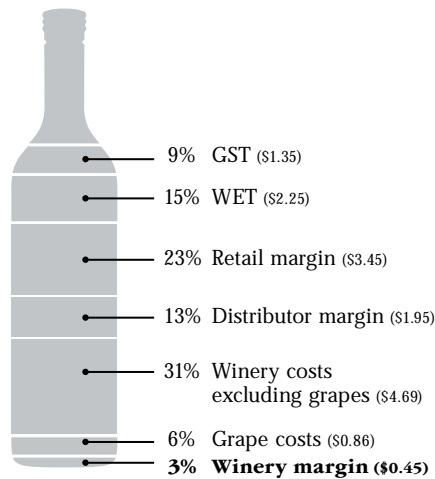
# Tax

“Australia is one of the most highly-taxed wine-producing countries in the world”

The alcohol beverage industry as a whole generated approximately \$4 billion in alcohol taxes last year. Wine is taxed by value through the Wine Equalisation Tax (WET), which collects in the region of \$650 million annually. The unique way in which the wine industry is taxed contributes significant revenue to government while also providing a sustainable business environment and a level playing field for small and large winemakers alike.

In 2004, a rebate on the WET was introduced, targeted at small wineries. It was introduced in recognition of the substantial hardship being faced by small regional wineries, and was also a vote of confidence in their essential role in generating employment and wealth in regional communities, as well as their paramount importance to the future of the Australian wine sector. As a result of this initiative, profitability levels for small winemakers changed overnight.

Percentages of the final retail selling price of a \$15 bottle of wine.

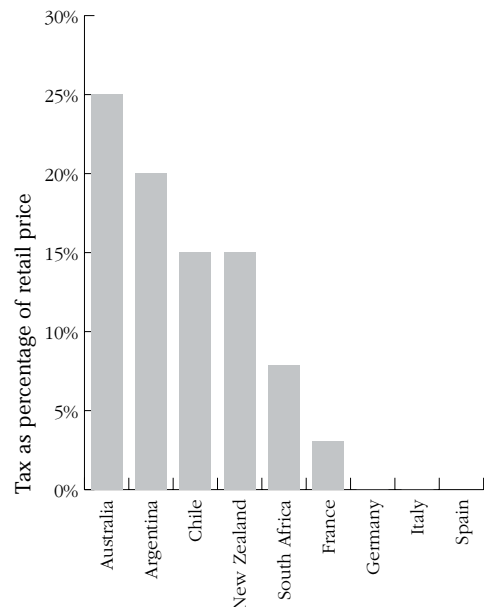


A massive 40% of small wineries were loss-making enterprises in 2003. While business is still tough, the removal of the WET impost on small wineries has made an essential and fundamental difference to small winery profitability, while at the same time leaving government taxation revenue largely intact.

No industry ever favours paying extra tax, but at the same time the Australian wine sector recognises the political reality that no government is likely to reduce the tax on alcohol. However Australia is in fact already one of the most highly-taxed wine-producing countries in the world, with taxes making up 25% of the retail price of a bottle of wine. Compare this to 3.1% in France, and 0% in Spain and Italy, and you will see that Australian wine producers are already contributing a significant share of revenue to government coffers. (WHO, 2004, via ICAP)

International wine tax comparison.

Source: WHO, 2004, via ICAP.



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# Health & Social Responsibility

Australia's grape growers and winemakers are passionate about the product they make. Australian wine is a quality product, created to be enjoyed with food and friends, in moderation. However alcohol abuse and harmful drinking behaviour is a very real concern for all those involved in the production and sale of alcoholic beverages, including wine. The wine sector accepts that it has a role to play, and has been pro-active in implementing measures to encourage responsible consumption.

The wine industry is involved in promoting responsible drinking at all levels – national and other industry organisations have a range of social responsibility measures. Many individual wine companies also have targeted alcohol education programs, and moderation messages are now commonplace on wine labels.

Standard unit labelling has been mandatory on alcoholic beverage packaging since 2006, but the wine industry has voluntarily developed an adaptable logo that wineries can use to increase the visibility of standard unit labelling to provide simpler informed drinking choices for consumers. This logo has been voluntarily adopted by wine companies representing over 80% of wine sales in Australia.

The wine sector is also self-regulated in terms of responsible advertising through the Alcohol Beverages Advertising Code, and has an excellent track record of compliance. Since 2004, only three wine-related advertisements have received complaints against the ABAC scheme, only one of which was upheld.



“Australian wine is created to be enjoyed with food and friends, in moderation”



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# Wine tourism

The wine industry is actively involved in tourism nationally, and also encourages domestic and international tourism to regional areas.

“The importance of wine to the local tourism economy is obvious”

There are now 1,625 wineries in Australia with cellar doors facilities, representing 70.7% of all wineries in the country (The Australian and New Zealand Wine Industry Directory, 2008). Victoria has the largest share and the most developed wine tourism network with 519 cellar doors, or 75.5% of Victorian wineries. Queensland may only offer 97 cellar doors, but at 90.6% of the state's wineries, the importance of wine to the local tourism economy is obvious.

Visitors to wineries increased rapidly between 2000 and 2006, with an 8% average annual increase for international visitors, and domestic overnight and day visitors increasing by an average of 6% and 5% annually. (Tourism Research Australia)

In the July and September quarters of 2006, domestic visitors to wineries spent \$335 million on purchasing wine, which equates to an approximate spend of \$666 million on wine for the year by domestic winery visitors. Estimated expenditure by international visitors equates to approximately \$37 million a year.



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# Environment

Water use efficiency is a high priority for all Australian grape growers and winemakers, and irrigation methods have changed to more efficient solutions such as drip irrigation. Many individual companies, and other industry associations, now have natural resource management strategies and systems in place.

The Australian wine industry has had a strong environmental policy for many years, even before the launch of the Australian Wine Industry Stewardship (AWIS) program in 2004. Recently re-launched under the EnviroWine Australia banner, this program remains the lynchpin of the Australian wine industry's environmental initiatives, with a participation rate of 70% of the Australian industry, by annual crush, in 2007. EnviroWine is designed to assist wine industry members in monitoring and controlling their impact on the environment, and working towards improved sustainability.

The Australian wine industry, in conjunction with its counterparts in California, New Zealand and South Africa, has taken environmental leadership to a new level by creating the first Greenhouse Gas Accounting Protocol and Calculation Tool for the International Wine Industry. The Protocol and Calculation tool have been formulated to help winemakers to monitor and assess their carbon emissions, and has seen significant uptake not only throughout the Australian industry, but also the rest of the wine-producing world.

# Drought

The drought has been this decade's toughest battle for most rural industries in Australia, and the grape and wine sector is no different. The 2007 harvest was 23% down on the previous year due to restrictions in water availability, and severe reductions in quotas for all irrigators relying on the Murray-Darling river system.

However the sector as a whole has responded positively to this challenge and the industry's Drought Management Taskforce is in place to help wineries manage the impact of future water restrictions. Meanwhile, the constrained production levels from lower water availability have allowed producers to build value back into their margins after years of abundant supply.

With a new marketing focus and an ongoing commitment to quality at all price levels, Australian wine producers are rising to the drought challenge with a new focus on environmental issues throughout the sector.



“Australian wine producers are rising to the drought challenge”



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# R&D the way forward

The Australian wine industry is committed to remaining at the forefront of international development around wine to ensure our sustainability as a world leader in innovation and adoption of new technology. Through the Grape & Wine Research & Development Corporation (GWRDC) and its many private research partners around the country, the wine industry invests around \$40 million a year into research and development.

This is further supported by additional co-investment from private wine companies, which provide assistance in terms of dedicated time, staff, facilities and expertise to bring these important projects to completion. Projects currently underway include research into better water management and other environmental issues, engineering and logistics topics and wine style and quality issues such as tannin management.



## Conclusion

The business environment is getting tougher for Australian wineries. Exchange rates are climbing, international markets are becoming more crowded, and environmental issues are putting increased pressure on winemakers and grape growers alike.

However Australia's wine sector is also evolving, and acting now to establish a sustainable future for the workforce, and for the environment. The Australian wine industry's contribution to the national economy grows in importance every year, both in terms of tax and export revenue, and as a large source of employment in rural communities all over the country.

Celebrate an Australian success story, and support the passion and commitment of a national network of regional industries: raise a glass to Australian wine.



“The Australian wine industry's contribution to the national economy grows every year”



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