



Wine  
Australia

# Annual Operational Plan 2022-23



We acknowledge the Traditional Owners and Custodians  
of the land throughout Australia and their continuing connection  
to the land, water and community.

We pay our respects to Aboriginal and Torres Strait Islander Elders  
past, present and emerging.



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# Wine Australia overview

## What we do

We invest for the Australian grape and wine sector's success.

## Our customers

Our funders are grapegrowers through the grape research levy, wine producers through the wine grape levy, wine exporters through the wine export charge, and the Australian Government through its matching funding for investments in research, development and adoption (RD&A).

Other customers include those employed by grape and wine businesses; national, state and regional representative organisations; researchers; state governments; wine industry suppliers; the media and our staff.

## Our powers and responsibilities

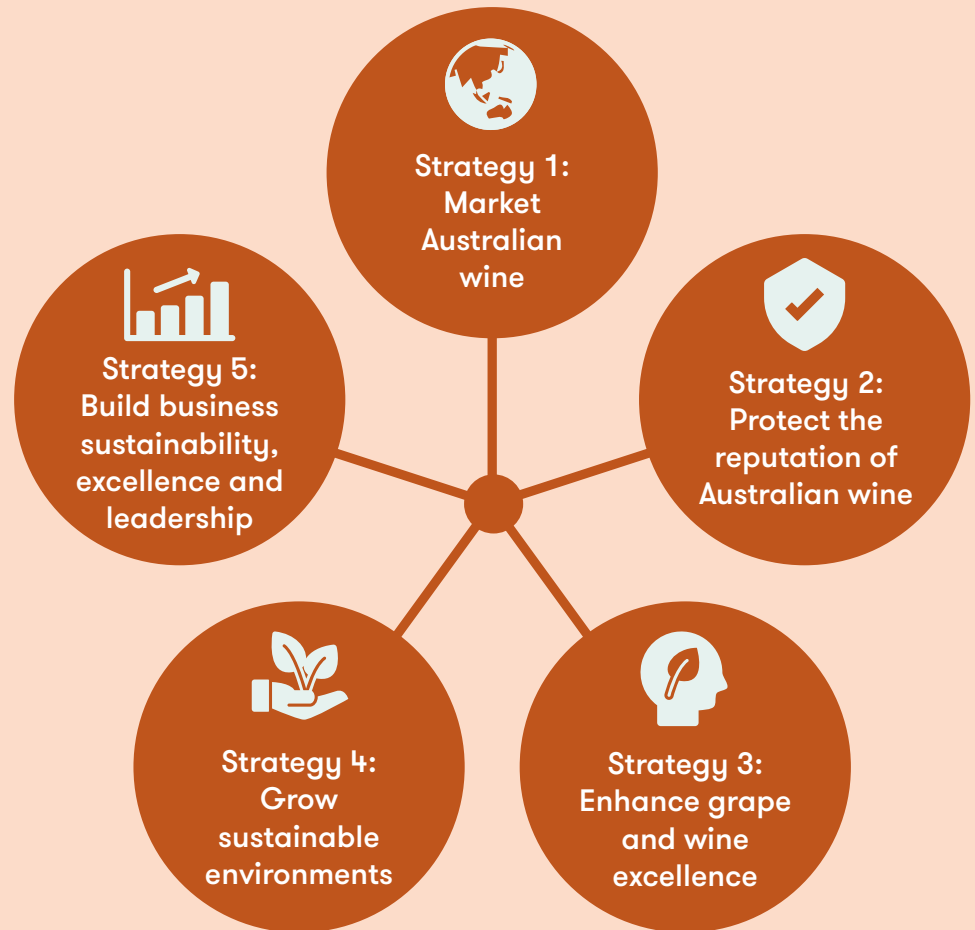
As set by the *Wine Australia Act 2013* (the Act), we:

- coordinate or fund grape and wine research and development, evaluate the investments and facilitate the dissemination, adoption and commercialisation of the results
- control the export of wine from Australia, and
- promote the sale and consumption of wine, both in Australia and overseas.

## Measuring success

We measure and assess our achievements against our strategies through key performance indicators (KPIs) and we report against our KPIs at least every six months.

## Our strategies



# Introduction

This *Annual Operational Plan 2022–23*, marks the halfway point in Wine Australia's *Strategic Plan 2020–25*. Since the Strategic Plan was approved in June 2020, the environment within which Australian wine businesses operate has significantly changed.

With our customers, we conducted a mid-point review of the operating environment to inform our strategic and operational planning. Consistently, we're told that the sector is facing unprecedentedly challenging conditions.

## Current state of the sector

Global market conditions have a significant impact on the success of the Australian wine sector as we are a highly export orientated sector, with around 60–65 per cent of our production exported each year. With supply and demand well balanced in the domestic market there is limited scope for expansion locally, meaning future growth is highly dependent on growing our share in the international marketplace.

The imposition of significant tariffs on Australian wine imported to mainland China, and the continuing frustrations caused by the COVID-19 pandemic – including the global shipping crisis, increases in the cost of doing business, disruptions to the hospitality sector, cellar door and winery shut-downs, and labour shortages – are being felt by grape and wine businesses across the country.

Wine Australia's Export Report for the year ending March 2022 shows a year-on-year decline of 26 per cent in value to \$2.05 billion (FOB) and 13 per cent decline in volume to 628 million litres. Comparing this to the same period to end of March 2020, a year largely free of pandemic restrictions and pre-China tariffs, Australian wine exports were \$2.9 billion and 728 million litres. In two years, across all of Australia's wine exports there has been a 28 per cent decrease in value and a 14 per cent decline in volume – a loss of \$822 million and 100 million litres of wine.

There is growth occurring in markets outside of mainland China. Excluding mainland China, exports declined by 3 per cent in volume to 623 million litres but increased in value by 7 per cent to \$2.03 billion. The average value increased by 11 per cent to \$3.26

per litre. The value is at the highest level since 2010. However, while the increase in value was strong at \$129 million, it was not enough to offset the decline in value to mainland China (\$844 million).

Record wine production combined with a reduction in overall sales volume has seen inventory levels and stocks-to-sales ratios increase in the year ended 30 June 2021. Wine Australia's *Production, Supply and Inventory Report* for 2020–21 confirms that the national wine inventory levels were the highest since 2005–06. Due to global market factors, we expect similar results throughout 2022–23.

Prior to the imposition of the import tariffs, 95 per cent of Australian wine exported to China was red wine. Since the imposition of the tariff on wine to China, of particular concern is the potential for an oversupply of red wine that will inevitably result in a downturn in red grape prices. Red grapes account for 60 per cent of the sector's production and prices declined by 4 per cent in 2021 – the first decline in price in five years following a period of consistent growth fuelled by demand for premium red wine in China.

Further to this has been the impact of the global shipping crisis, which has not only impeded getting wine onto ships and to market, but also the costs of doing business. The costs of shipping have risen and so too has the costs of supplies, such as fertiliser, as well as an increase in the timeframes to receive imported goods.

## Wine Australia operations

For Wine Australia, the significant reduction in revenue derived from the Wine Export Charge due to the reduction in the value of wine exports has significantly decreased the funds available for marketing, hampering our ability to stimulate growth in new and existing markets, and to immerse our international audience in our wine regions.

However, we must continue to grow our market share in traditional markets such as the UK, US and Canada. Further, we must refocus our efforts on intensifying and expanding

markets of potential growth and on building a profile for Australian wine in new and emerging markets.

The sector recognises the opportunity to build on past momentum and capture greater market share. Through co-design with the sector, there's strong capability within Wine Australia to deliver impactful campaigns that deeply resonate with trade and consumers to increase the demand and the premium paid for Australian wine. We'll continue to support the sector's efforts through other initiatives, such as Australian Grape & Wine's activities funded through the Australian Government's Agricultural Trade and Market Access Cooperation (ATMAC) grant.

Within the research, development and adoption (RD&A) environment, there's an increasing appetite for innovation, co-design and co-investment. These are coming from within the wine sector and from outside, with the expansion of innovation hubs and cross-sector focus in key priority topic areas. As RD&A levies have not changed ratio, funds are not able to support as much as in previous investment terms. Wine Australia remains committed to promoting the collective interests of the Australian grape and wine community while supporting further collaboration in RD&A investments.

## Changes on the horizon

In recent times, there has been further instability in the geopolitical climate in some major traditional markets as well as newer/emerging markets.

There has also been rapid change in consumer preferences. Consumers are increasingly making changes to their choices, and understanding of what they buy, where they buy it from and how it is made. In some of Australian wine's major markets there is a shift away from wine and into competitor categories; or in some cases, to low and no alcohol products. Rising ethical consumerism has seen an acceleration around the world of sentiment towards sustainably produced products and in looking to locally sourced and produced goods. Furthermore, a heightened expectation around packaging and visual engagement is steadily developing. With these changes come opportunities that the sector must be ready to grasp.

The sector has confirmed there's a renewed urgency in investing in sustainability, and while many stakeholders confirmed that they are considering, or are already engaged in the sector's sustainability program Sustainable Winegrowing Australia (SWA), many have indicated that further development of the program is required. We're being told

that it's imperative that the program be aligned to market trends – both domestically and overseas, and that it be expanded beyond environmental sustainability to incorporate ethical and economic sustainability.

We're being told that failure to execute a sector-wide strategy to strengthen and promote the sustainability credentials of the Australian grape and wine sector will have a deleterious effect on the Australian wine sector, and that in circumstances where minimum sustainability credentials are being mandated by many dominant international purchasers, it presents the most significant market access risks over the medium- to long-term.

## What is the response?

We have undertaken extensive customer engagement and confirmed that the existing five pillars of Wine Australia's *2020–25 Strategic Plan* are fit-for-purpose and provide a sound foundation for the sector's progression through the challenges that we've experienced throughout the past couple of years. However, the significant changes to the operating environment warranted a refresh of Wine Australia's operational priorities and 10 priority areas have been identified in response (see Figure 1).

Despite the many challenges, there is potential around the opportunities. There are opportunities to grow Australia's market share in existing wine export markets and expand into new markets. Opportunities to take a leading role in sustainability. And opportunities to further our collaboration and co-design for greater return in value for RD&A investments. Wine Australia is moving forward with the sector with plans to support its profitability and growth and this Annual Operational Plan will outline how we will do so in 2022–23.



Figure 1: Changes to the sector's operating environment and Wine Australia's responding operational priorities





# Activities and targets



# Strategy 1

## Market Australian wine

Wine Australia's marketing efforts aim to increase the demand and premium paid for all Australian wine.

This coming year, our marketing strategy will be refreshed in accordance with the shifting competitive environment, changing consumer landscape and market diversification imperative. The refresh will be a continuum of strategic, collective, and operational decisions to rethink our approach and take considered action.

A new, joint marketing committee – led by an independent Chair and comprising a broad range of sector representatives – will be formed to provide sector engagement, expertise and recommendations on strategic, tactical and operational plans.

Market prioritisation has been determined through market insights. Our focus markets for activities are the UK, US, Canada, Europe, South Korea, Japan, Taiwan, Thailand, Vietnam and Indonesia. However, we will also conduct activities in Hong Kong and Singapore. Following the signing of the Australia-India Economic Cooperation and Trade Agreement (AI ECTA), initial work for the India market will also commence, largely comprising the gathering of market intelligence and work with Austrade.

Tactical approaches for each market will be informed by category and consumer insights with on-the-ground intel. The market insights team will continue to source the latest information and trends and share this information with producers through our communications channels and 'ask an analyst' sessions.

Wine Australia will maintain our direct in-market representation in the US, Canada and UK and continue to partner with Austrade and its many posts to deliver marketing activations, particularly in the Asia Pacific region.

Wine Australia's China-based team has been critical in supporting the Australian wine category in China and, over many years, the team developed myriad avenues for the success of the sector and supported its growth in the market. While our physical office will close in Shanghai, Wine Australia will continue to maintain our Chinese consumer



social media channels and will continue to work with the Australian Government's agricultural counsellors in China to maintain market intelligence.

Australian Grape & Wine, through their ATMAC grants, will place Australian wine ambassadors in Japan and Korea for an initial two-year term. We will support these ambassadors as they establish trade networks and champion Australian wine.

In-market activity will continue to be underpinned by the four pillars:

- brand: Australian Wine Made Our Way
- education: Australian Wine Discovered
- capability building, and
- sustainability.

We strive to achieve a balance of collective Australian wine brand building and marketing activations in key markets. The Australian Wine Made Our Way brand and key messages continue to distinguish our unique offering and resonate with trade and consumers. Changing consumer perception has always been a marketing imperative and the opportunity lies in connecting Australian wine to local culture and occasion. Social and digital are the primary channels that will continue to be used to maintain global brand presence.

Marketing activations vary from country to country, in accordance with our target audience's touchpoints. We use online and offline marketing communications channels, which include retail and distributor activations and promotions, virtual and hybrid events, media and influencer outreach, public relations, email and search engine marketing as well as sponsorships and partnerships.

We have been excited to again host in-person trade events late in the 2021-22 financial year, and look forward to getting back into market with exporters and their representatives again this year to re-establish the Australian wine presence at major international trade shows as well as curating our own integrated events.

Australian Wine Connect has been live for a year, creating more than 1200 business connections between trade and wine producers. This year, the digital platform will continue to provide value to wineries, drive B2B connections, enhance functionality for

in-person events and offer translation tools. Our partnership with Vinexposium-Connect will continue for another 12 months and we are continuing explore partnerships with other digital platforms.

Education is a core function as it helps build greater knowledge among trade, media and consumers. We continue to invest in the development of Australian Wine Discovered, and will promote new modules and advanced presentations in English and six translations this year. Our Education Development Managers will continue to engage with leading educators and run trainings and workshops for on- and off-premise customers.

Building capability and skills within our sector is essential. The capability building program for this financial year will include sharing of insights and understanding the marketing opportunity, the launch of the new Export Ready hub and online wine tourism course, cultural trainings, market briefings, another supercharged US Market Entry program and return of the popular 'Explore' programs in Canada and EMEA.

We will continue to collaborate with AWRI and Australian Grape & Wine to grow the Sustainable Winegrowing Australia national program to attract and retain members, evolve the program and promote our sustainability credentials.

Marketing funding is limited because of the reduction in exports and associated charges. Wine Australia has approximately \$1.5 million available to invest directly in marketing campaigns globally. Additional investment comes from user-pays activity where wineries invest in marketing activity such as trade events and market entry programs, grants from the Australian Government's Agricultural Business Expansion Initiative (ABEI), and state and regional investment and partnerships.

Fragmented funding means the sector needs to coordinate efforts for greater impact. To optimise marketing impact, our campaigns are developed through a process of setting measurable objectives, quantifying outcomes, seeking feedback and creating a culture of continuous improvement determines where our efforts are best directed.

The next 12 months will continue to be a time of change and challenges. How the Australian wine sector unites to face them, find new opportunities, and position Australian wine will be critical to set the sector up for long-term success and to achieve *Vision 2050*.

## Strategy 1: Market Australian wine

| Strategic Plan measure of success  | Measure of success 2022–23   |
|--|--|
| 85 per cent of Tier A influencers <sup>1</sup> engage with Wine Australia  | <p>At least 85 per cent of Tier A influencers actively engage with Wine Australia through regular contact and outreach via Australian Wine Connect (and associated) virtual and in person events, Australian Wine Discovered, retail partnerships, trade market programs (i.e. market entry and explore programs) and partnerships as well as communications and social media channels.</p> <p>More than 1200 business-to-business connections made through in person and virtual marketing activity.</p> <p>Overall likelihood of trade to recommend Australian Wine Connect and Australian Wine Discovered – Net Promoter Score of 40.</p> <p>Growth in the Australian Wine Connect trade community (year-on-year).</p> <p>Growth in downloads of Australian Wine Discovered resources, assets and tools on (year-on-year).</p> <p>Increase in positive media sentiment in media coverage and other published content on Australian wine (year-on-year).</p> |
| The perception of Australian wine increases in Canada, the UK, the USA and China <sup>2</sup> , by 5 per cent in each market.  | <p>As measured through the annual Wine Intelligence survey, average consumer perception of Australian wine increases across Canada, the UK and USA by 5 per cent (from 8.2 to 8.6).</p> <p>For social media, achieve an average of 4.5 per cent organic engagement rate across our key channels (Instagram, Facebook and LinkedIn).</p> <p>Resulting media coverage from Wine Australia about Australian wine in key markets records predominantly positive or neutral sentiment scores.</p>   |
| <i>Vision 2050</i> has set ambitious targets for the sector. Our marketing activities will contribute to achieving these and we will regularly report progress, acknowledging that sales results across markets are the responsibility of exporters. | <p>Increase in bottled FOB average value in Canada, the UK and USA (year-on-year).</p> <p>Export value growth in key emerging markets (year-on-year) of Taiwan, Thailand, South Korea, Vietnam, Indonesia, Malaysia, Singapore and Japan.</p>  |
| More than 90 per cent of our partners who participate in a Wine Australia promotional activity are satisfied or very satisfied with the activity.  | <p>Wineries that participate in Wine Australia marketing campaigns report a 75 per cent or higher satisfaction rating.</p> <p>Year-on-year increase in the number of exporters to key markets.</p> <p>Wineries that use the Export Ready hub report a 75 per cent or higher value rating for their business.</p>   |

<sup>1</sup> Wine Australia has identified those people in the wine trade and wine media who have the most influence on purchasing decisions as Tier A influencers

<sup>2</sup> Due to the tariffs imposed on bottled exports to mainland China in November 2020, this is no longer considered an appropriate KPI.



## Strategy 2

# Protect the reputation of Australian wine

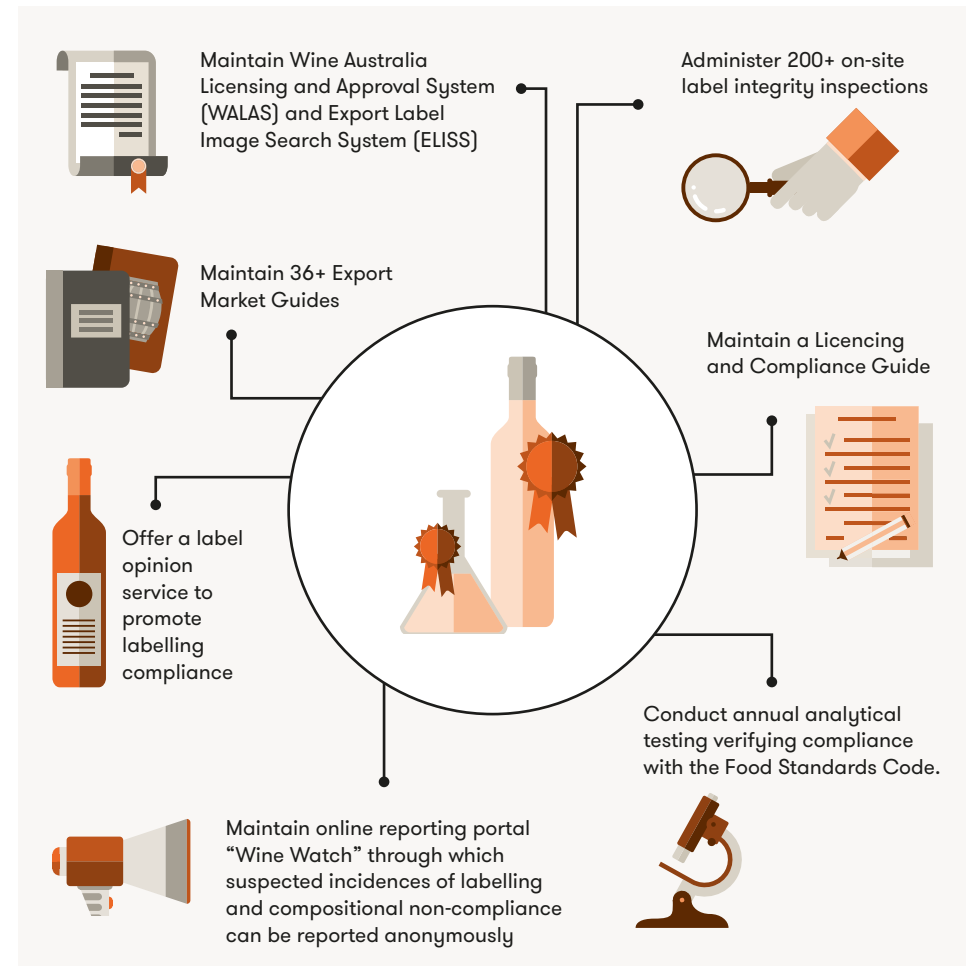
The regulatory activities conducted by Wine Australia pursuant to the *Wine Australia Act 2013 (Act)* and the *Wine Australia Regulations 2018 (Regulations)* are:

- controlling the export of grape products from Australia as set out in the Regulations, and
- administering the Label Integrity Program (LIP) described in Part VIA of the Act.

The LIP helps ensure the truth and the reputation for truthfulness of Australian wine labels and the export controls ensure the protection of the reputation of Australian grape products. In 2022–23 we will effectively administer our regulatory functions by:

- maintaining Wine Australia Licensing and Approval System (WALAS) – the online system that manages export licensing, product approvals, shipping approvals and certification, and that monitors compliance with the Australia New Zealand Food Standards Code (Food Standards Code) and the Label Integrity Program administered under the Act
- maintaining an online directory of labels exported from Australia through the publicly accessible Export Label Image Search System (ELISS)
- administering 200+ on-site label integrity inspections
- maintaining the online reporting portal Wine Watch, through which suspected incidences of labelling and compositional non-compliance can be reported anonymously
- maintaining 36+ Export Market Guides
- offering a label opinion service to promote labelling compliance
- maintaining a Licensing and Compliance Guide, and
- conducting annual analytical testing verifying compliance with the Food Standards Code.

### Priority areas for Strategy 2



## Regulator Performance Guide

In 2022–23, we will measure and report our performance in accordance with the Department of Prime Minister and Cabinet's Regulator Performance Guide to ensure that we conduct our regulatory functions with the minimum impact necessary to achieve regulatory objectives.

## Cost Recovery Implementation Statement

In 2022–23, in accordance with the *Public Governance, Performance and Accountability (Charging for Regulatory Activities) Order 2017*, we will maintain a Cost Recovery Implementation Statement (CRIS) providing information on how we implement cost recovery for its regulatory activities.

## Market access

We will continue to work with the Australian Government to promote free trade negotiations that might result in Australian exporters obtaining preferential treatment in export markets, and we will monitor potential impediments to trade, with a view to enhancing market access, minimising technical trade barriers to trade, and streamlining regulatory processes through cooperation with counterpart regulators.

### Strategy 2: Protect the reputation of Australian wine

| Strategic Plan measure of success  | Measure of success 2022–23   |
|--|--|
| Achieve the six key performance indicators in our Regulator Performance Framework <sup>1</sup> .   | We will measure and report our performance in accordance with the Department of Prime Minister and Cabinet's Regulator Performance Guide: <ul style="list-style-type: none"><li>• continuous improvement and building trust – regulators adopt a whole-of-system perspective, continuously improving their performance, capability and culture to build trust and confidence in Australia's regulatory settings</li><li>• risk based and data driven – regulators manage risks proportionately and maintain essential safeguards while minimising regulatory burden, and leveraging data and digital technology to support those they regulate to comply and grow, and</li><li>• collaboration and engagement – regulators are transparent and responsive communicators, implementing regulations in a modern and collaborative way.</li></ul> |
| Establish a benchmark for consumer trust of Australian wine label claims through a customer survey in our five largest markets – Australia, China <sup>2</sup> , the UK, the USA and Canada. | We will use the results of a consumer survey by Wine Intelligence to establish the benchmark for consumer trust by measuring how many Australian wine drinkers agree with the statement "I trust the authenticity of these wines" in key markets.  |
| Having assessed three new traceability technologies, including blockchain, and their being available to the sector for adoption.   | We will assess at least one new traceability technology and communicate the results, including to the Wine Industry Technical Advisory Committee.  |
| Deliver streamlined regulatory process through cooperation with counterpart regulators in import markets.  | We will engage with counterpart regulators in import markets to identify opportunities to cut red tape for our exporters and provide case studies in our Annual Report highlighting successes achieved through such engagement.  |

<sup>1</sup> Note that the Regulatory Performance Framework implemented in 2014 has been replaced by the Department of Prime Minister and Cabinet's Regulator Performance Guide.

<sup>2</sup> Due to the tariffs imposed on bottled exports to mainland China in November 2020, this is no longer considered an appropriate KPI.

## Strategy 3

# Enhance grape and wine excellence

This strategy focuses on building grape and wine excellence across the sector.

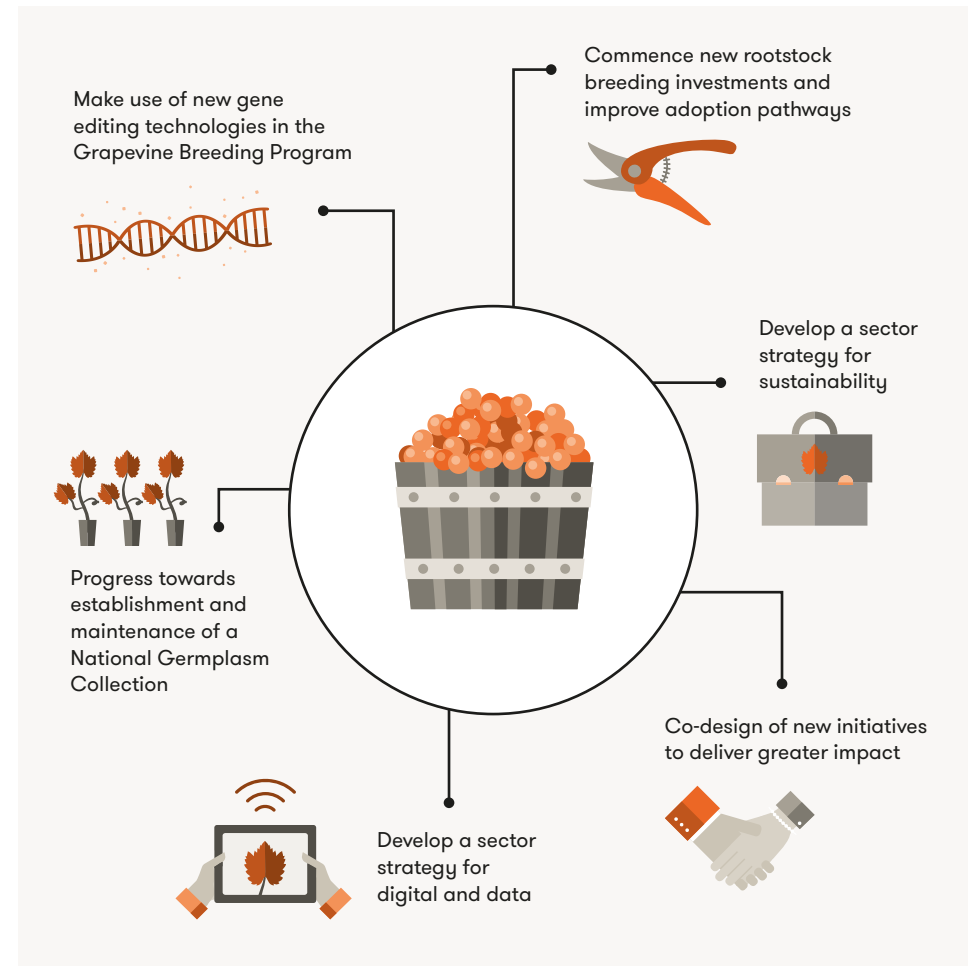
In 2022–23, we will begin transitioning our longstanding investment in grapevine breeding to make full use of new gene editing technologies. Our intention is to allow the advances that have been made through conventional breeding to remain accessible to the sector, while incorporating new technologies into the future breeding program.

We will also make further progress towards the establishment and maintenance of a national germplasm collection as well as towards ensuring the supply of certified, healthy planting material to the sector.

A sector wide strategy on sustainability and on digital and data will be developed and used to guide future investments.

We will co-design new initiatives with the grape and wine sector and other partners to deliver greater impact in grape and wine production efficiency, supply chain optimisation and profitability, sustainability, digital tools, data opportunities, no- and low-alcohol wine production, and wine quality.

### Priority areas for Strategy 3





### Strategy 3: Enhance grape and wine excellence

| Strategic Plan measure of success   | Measure of success 2022–23  |
|---|---|
| Four enhanced or new grapevine varieties being available to the sector through plant breeding programs, informed by molecular methods to identify desired genotypic traits such as resistance to powdery and downy mildew.    | New pathways to evaluation and adoption of conventionally bred scions established.<br>New investments in DNA-free editing of grapevines initiated.  |
| Three new rootstocks being available to the sector through plant breeding programs, informed by molecular methods to identify desired genotypic traits such as improved tolerance to nematodes, phylloxera and soil salinity. | New rootstock breeding investments initiated.<br>Rootstock adoption pathways reviewed and improved.   |
| Four new or enhanced technologies and processes to improve vineyard efficiency and sustainability being available to the sector.  | Strategy and business plan for sustainability, co-designed and agreed by the sector, including market access requirements, ESG (environmental, social, and governance), marketing, certification, metrics, research priorities, investment and governance options.<br>Strategy for digital and data co-designed and agreed by the sector.<br>New initiatives on supply chain optimisation and profitability, sustainability and in digital and data co-designed and launched.<br>Other outputs delivered as contracted in existing investments. |
| The supply of genetically diverse and high-health planting material being maintained to the satisfaction of relevant stakeholders.  | National Grapevine Collection outputs delivered as contracted.<br>Phase 2 of a project to develop and adopt a grapevine standard across the propagation supply chain initiated.   |
| Two new or enhanced technologies and processes, including agtech to improve grape and wine quality, winery efficiency and sustainability, being available to the sector for adoption.   | New initiatives led by AWRI on no- and low-alcohol wine production and on wine production and quality co-designed and commenced.<br>Other outputs delivered as contracted in existing investments.  |
| At least three Wine Australia-funded projects having progressed to commercialisation.   | Commercialisation approach and strategy reviewed, and one project progressed to commercialisation.  |

## Strategy 4

# Grow sustainable environments

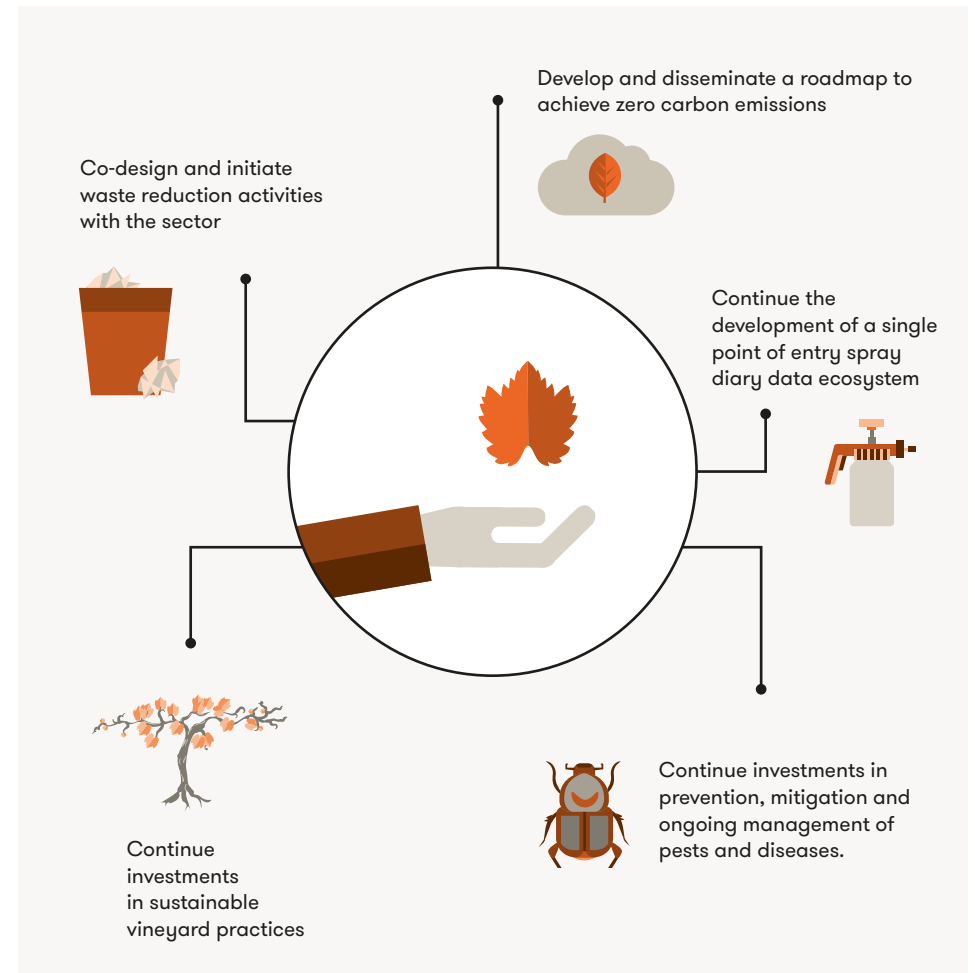
This strategy focuses on providing knowledge and tools to help growers and producers to be more environmentally sustainable.

In 2022–23 we will develop and disseminate a roadmap for the grape and wine sector to achieve net zero carbon emissions, and co-design and initiate waste reduction activities with the sector. We will commence a project to provide recovery and recycling options for treated timber vineyard posts, and continue work to create a single point of entry data ecosystem for online spray diaries so that growers can share their records to purchasing wineries and the Sustainable Winegrowing Australia program.

We will continue to provide the sector with the information it needs to manage the challenges of long-term climate change, including that of increased bushfire risk. We will also map out the investments required to support the grape and wine sector's adoption of climate change mitigation strategies.

We will continue to invest in research relating to soil health, cover crops and biodiversity, in more sustainable management of endemic pests and diseases and in initiatives to better prepare the sector for exotic pests and diseases.

### Priority areas under Strategy 4



#### Strategy 4: Grow sustainable environments

| Strategic Plan measure of success   | Measure of success 2022-23  |
|---|---|
| New knowledge allows the sector to establish a carbon emissions benchmark.  | Release of a roadmap to zero carbon emissions for the grape and wine sector, which will include a carbon emissions benchmark.   |
| New knowledge allows the sector to establish waste production benchmarks.   | New investments in vineyard waste reduction are co-designed with the sector and started.  |
| Two (new) tools, technologies or processes are available to the sector to allow it to adapt to and/or mitigate the effects of climate change.   | Investment requirements mapped out and new projects established on climate change adaptation and mitigation strategies that can be adopted by the grape and wine sector.<br>Other outputs delivered as contracted in existing investments.  |
| A better understanding of vine water use contributes to better irrigation scheduling processes that allow more efficient and effective use of water.  | New investments initiated through the One Basin CRC.<br>Other outputs delivered as contracted in existing investments.  |
| Research delivers clear information about the value of soil remediation processes and enhancing functional biodiversity.  | New knowledge that allows the development of a grower-friendly tool for selection and management of groundcovers.<br>Other outputs delivered as contracted in existing investments.   |
| New and improved practices for sustainable management of endemic pests and diseases are available to the sector.  | The RD&A gaps in management of viruses and other pests and diseases identified and new projects commenced to address them.<br>Development of an online spray diary and a supporting secure data repository commences.<br>Other outputs delivered as contracted in existing investments. |
| The sector is better prepared to manage incursions of exotic pests and diseases through our support of a wine biosecurity committee that engages all relevant bodies to identify biosecurity risks and develop a plan to mitigate them. | Investment requirements mapped out and new projects started on cross sectoral biosecurity innovations that can be adopted by the grape and wine sector.<br>Other outputs delivered as contracted in existing investments.   |
| The use of vineyard cover crops and soil remediation practices has increased by 10 per cent.  | Adoption strategy for vineyard cover crops developed and commenced.   |
| The land area dedicated to enhancing functional biodiversity has increased by 10 per cent.  | Adoption strategy for increasing functional biodiversity developed and commenced.   |
| Best-practice irrigation to optimise water use efficiency is adopted by an additional 30 per cent of growers in warm irrigated regions.   | New practice change investments commenced through One Basin CRC.  |



## Strategy 5

# Build business sustainability, excellence and leadership

This strategy focuses on accelerating the adoption of research outcomes and best practice.

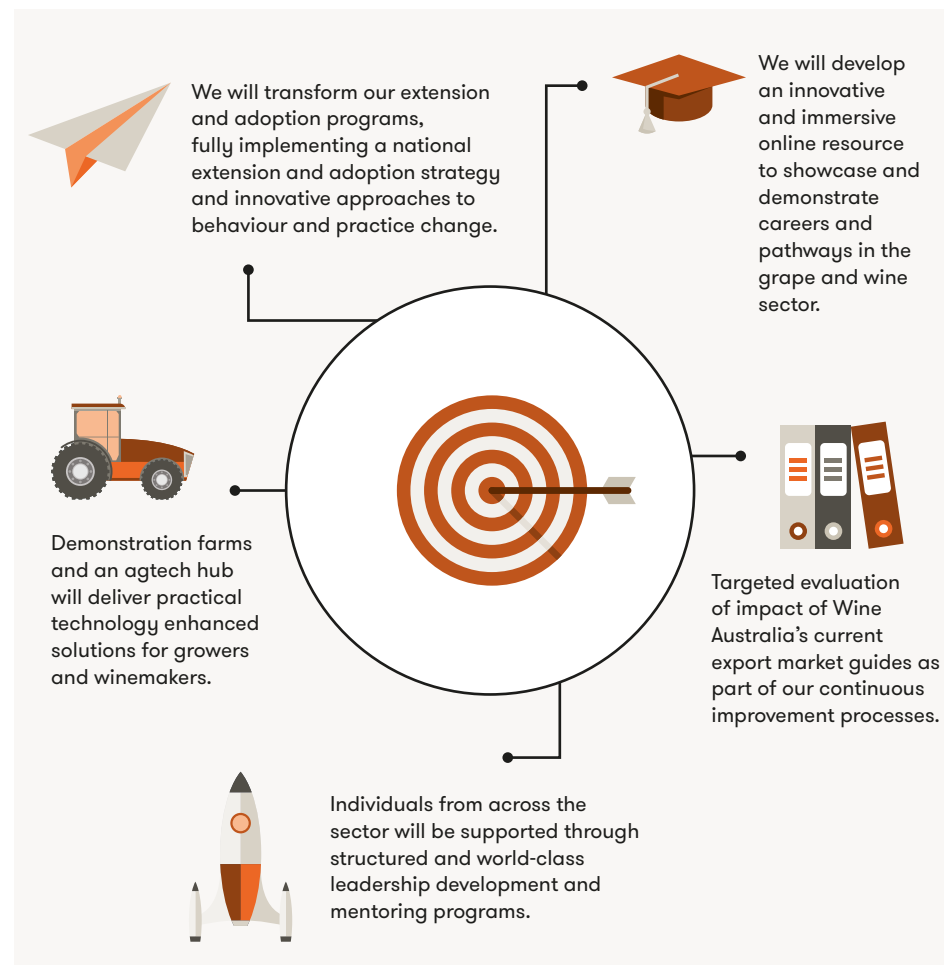
In 2022–23, we will continue to focus on facilitating practice change and the adoption of existing knowledge to improve winegrape growing, winemaking, exporting and running a wine business. We will use innovative approaches to behaviour and practice change in all our programs, including those delivered by extension providers we support and through our Regional Program and other initiatives such as agtech demonstration sites.

We will enhance evidence-based and data-driven decision-making in the sector through the Interactive Insights online platform, preparation of regular market reports and analysis, presentations at wine sector forums and individual analyst sessions. We will also commence the Australian Government-funded Improving Market Transparency project to promote transparency of winegrape pricing.

We will continue to help develop the leaders of tomorrow – and build the skills of the leaders of today – through both national and regional leadership programs. Our support of the whole-of-sector Wine Industry Mentor Program, a collaboration between Wine Australia, the Australian Society of Viticulture and Oenology, Wine Communicators of Australia and the University of Adelaide will inspire the future generations of grape and wine sector professionals by giving them opportunities to tap into the experiences and insights from the best in their field.

We will also work with the school, vocational and higher education sectors as well as Australian Government-funded initiatives to promote pathways to the grape and wine sector as a career of choice. A suite of new case studies and an online virtual reality resource that showcases contemporary grape and wine careers across the sector value chain will be developed and made available for use within schools, education providers and the sector.

### Priority areas for Strategy 5



We will invest in the sector's research capability by supporting postgraduate students and we will encourage stronger engagement and collaboration with the sector so that their research is relevant and addresses clear sector needs.

We will measure and report on stakeholder satisfaction with the services we provide, and on our effectiveness in achieving our measures of success.

## Strategy 5: Build business sustainability, excellence and leadership

| Strategic Plan measure of success  | Measure of success 2022-23  |
|--|---|
| <p>Of levy payers who participate in Wine Australia-supported extension and adoption programs:</p> <ul style="list-style-type: none"> <li>• 80 per cent consider them as a good or very good use of levy funds</li> <li>• 80 per cent have gained new knowledge or new information to improve their long-term profitability and sustainability</li> <li>• 50 per cent intend to make, or have made, changes to existing practices by adopting the outcomes of R&amp;D</li> <li>• 80 per cent of those who've adopted agtech have a positive return on their investment.</li> </ul> | <p>New arrangements for the Regional Program are co-designed, endorsed and agreed to by participants.</p> <p>Awareness raising and extension activities incorporate behavioural science principles and receive excellent levels of engagement and feedback.</p> <p>Targeted adoption and practice change programs are underpinned by specific, measurable and actionable objectives and metrics of adoption outcomes.</p> |
| <p>More than 90 per cent of participants in people development programs have gained new knowledge and skills to improve their personal and professional leadership capabilities.</p>   | <p>Leadership programs continue to attract excellent candidates and receive positive feedback.</p> <p>A refreshed PhD scholarship program developed with university partners.</p> <p>Resources demonstrating careers and pathways in the grape and wine sector are available.</p>   |
| <p>99 per cent of exporters have access to the information and knowledge they need to meet the requirements of the importing country.</p>  | <p>Review the destination of exports to ensure that exporters' information needs are met by our export market guides.</p>   |
| <p>More than 90 per cent of market insights customers are satisfied or very satisfied with our market insights services.</p>   | <p>Governance structure, project plan and resourcing are in place for the Improving Market Transparency project.</p> <p>Maintenance and enhancement of dashboards, and incorporation of more consumer insights into market analysis.</p>  |

# Customer engagement

In 2021, Wine Australia was provided with the *Best Practice Guide to Stakeholder Consultation*. The Guide provides a set of guiding principles that apply to all RDCs – recognising that each RDC is different and engages differently with stakeholders. The Guide also outlines what good stakeholder consultation looks like for Wine Australia and describes how the sector would like to be consulted in the identification of research, development and extension (and marketing) priorities.

In 2022–23, we will maintain an overarching consultation plan that is informed by this Guide, with a view to making it easy for the Australian grape and wine sector to participate. The consultation plan on the Wine Australia website will be updated as consultation activities are planned and executed in more detail.

This year we will develop a Customer Engagement Framework, incorporating a range of organisation-wide processes as well as a contact management system to strengthen meaningful engagement with our customers.

We will also undertake another strategic review, assessing the operating environment for the sector to fully understand challenges and opportunities on the horizon. We will regularly consult with our customers, and work with the sector and other partners using co-design principles to develop investments with greater impact for the sector.

We have two Strategic Plan KPIs to measure and assess the effectiveness, efficiency and transparency of our operations:

- we improve our stakeholder net promoter score from the benchmark of +12 in 2019, and
- we improve our staff engagement levels from the benchmark of 70 per cent in 2019.

These KPIs will be reported on in the 2024–25 Annual Report, the final report in the current Strategic Plan cycle. Activities this financial year will assist towards the achievement of the KPIs.



# Finance

## Estimates of revenue

For the financial year 2022–23, we estimate that proceeds from levies will amount to \$18.5 million.

This is based on assumptions including vintage 2022 of 1.78 million tonnes and exports of approximately \$2.3 billion in FOB value, as the quantum of levies and the Wine Export Charge is affected by crop size and export values.

Australian Government matching contributions for RD&A funding for 2022–23 is estimated to be \$12.5 million.

Table 1: Estimates of revenue by source for 2022–23

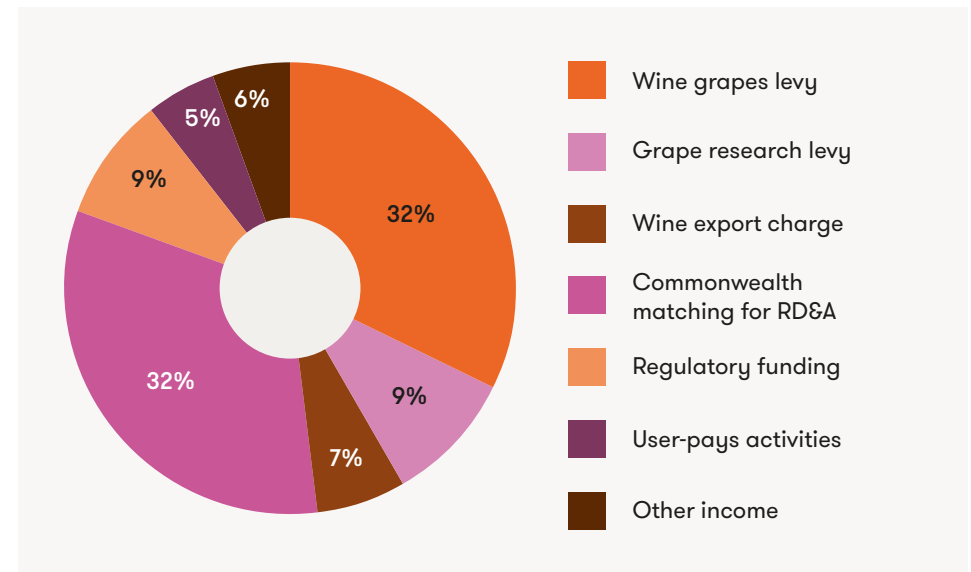
| Source                         | \$ million   |
|--------------------------------|--------------|
| <b>Levies</b>                  |              |
| Wine grapes levy               | 12.46        |
| Grape research levy            | 3.56         |
| Wine export charge             | 2.52         |
| Commonwealth matching for RD&A | 12.46        |
| Regulatory funding             | 3.38         |
| User-pays activities           | 1.98         |
| Other income                   | 2.05         |
| <b>Total income</b>            | <b>38.41</b> |

It is estimated that proceeds from fees and charges will total \$3.4 million and revenue from user-pays activities will be \$2.0 million.

This year, 2022–23, the Wine Tourism and Cellar Door Grant administered by Wine Australia will continue. This has not been included in the budget as the contract has not been executed. There will be \$10 million plus GST available for eligible grant recipients.

Our estimates of this and total revenue are provided in Table 1. Figure 2 indicates the contribution of each revenue source to the total revenue of \$38.4 million.

Figure 2: Estimates of revenue by source for 2022–23



# Estimates of expenditure

Estimates of expenditure for 2022-23 are shown in Table 2 and illustrated in Figure 3. Expenditure by activity are shown in Table 3 and illustrated in Figure 4.

These figures are indicative only, as changes in our operating environment may require us to vary the total expenditure of specific allocations.

The forecast funding shortfall of \$5.4 million is in line with our approved Department of Finance operating loss for RD&A expenditure, in addition to significantly reduced income from regulatory fees and charges.

Our representative organisation will receive funding to support our objectives. In 2022-23, Australian Grape & Wine Inc will receive \$25,000 to support participation at the International Organisation of Wine and Vine (OIV) and \$70,000 for leadership and participation in Wine Australia’s consultation activities, as outlined in Wine Australia’s Stakeholder Engagement Plan. Australian Grape & Wine will also facilitate extension and adoption of research and development and maintain sector committees to provide sector feedback. Finally, Australian Grape & Wine will also facilitate joint engagement with the sector across a range of other forums.

In Tables 7 to 10, we detail our RD&A investments by project term, risk category, research type and geographical focus. Table 5 provides a detailed breakdown of the R&D expenditure estimates against the Australian Government’s Science and Research Priorities, and National Agricultural Innovation Priorities (Table 6).

Table 2: Estimates of expenditure by strategy for 2022-23

| Strategy   | \$m   |
|--|-------|
| Strategy 1: Market Australian wine                                   | 7.80  |
| Strategy 2: Protect the reputation of Australian wine                | 2.68  |
| Strategy 3: Enhance grape and wine excellence                        | 13.51 |
| Strategy 4: Grow sustainable environments                            | 8.33  |
| Strategy 5: Build business sustainability, excellence and leadership | 5.13  |
| Support functions  | 5.35  |
| Levy collection costs  | 0.99  |
| Total expenditure  | 43.79 |

Figure 3: Estimates of expenditure by strategy for 2022-23

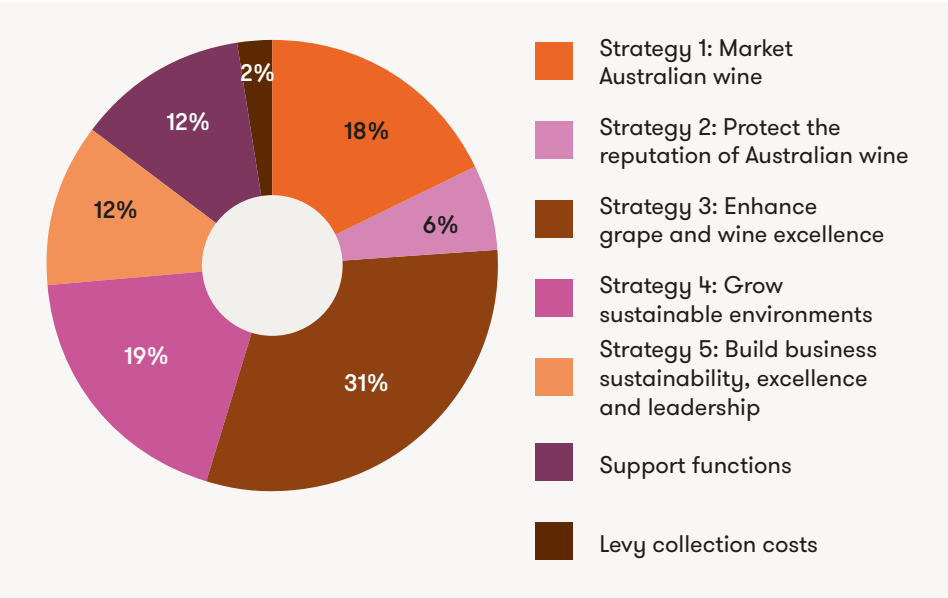
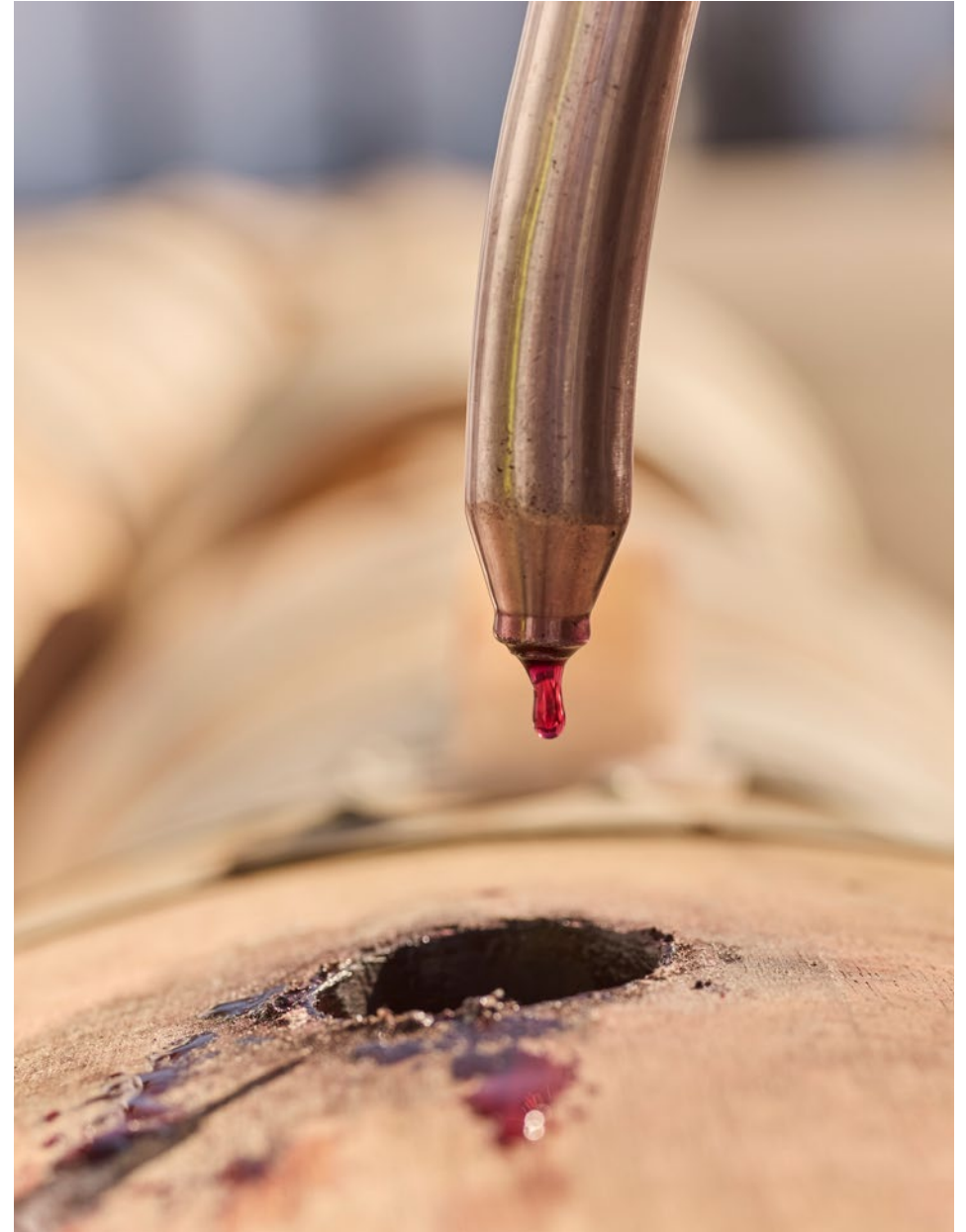
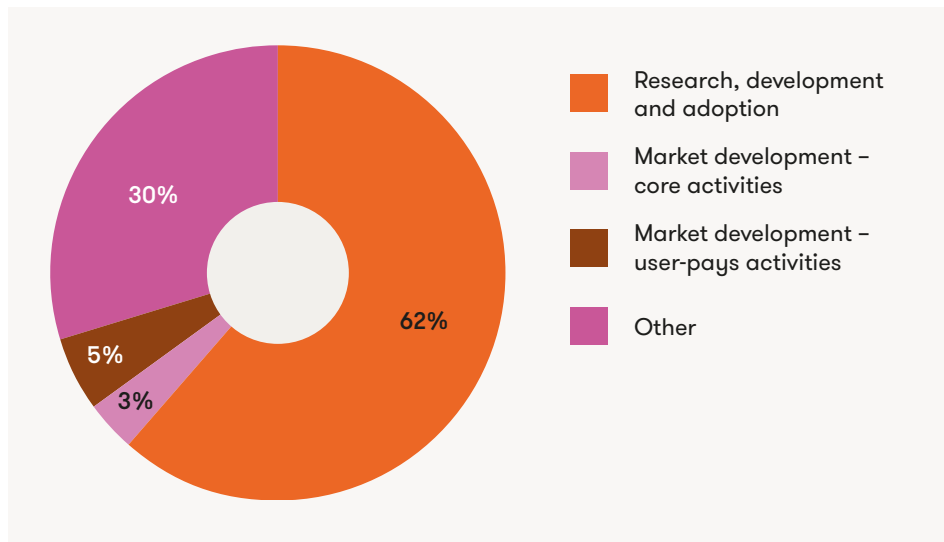




Table 3: Estimates of expenditure by activity for 2022-23

| Activity                                  | \$m          |
|---|--------------|
| Research, development and adoption        | 27.00        |
| Market development – core activities      | 1.47         |
| Market development – user-pays activities | 2.34         |
| Other                                     | 12.98        |
| <b>Total activity expenditure</b>         | <b>43.79</b> |

Figure 4: Estimates of expenditure by activity, for 2022-23



# Funding agreement obligations

## Background

In accordance with section 35(1c) of the Act, the Minister may enter into a Funding Agreement with Wine Australia. The agreement must specify the terms and conditions on which money paid to Wine Australia by the Commonwealth will be spent. The Act also provides that Wine Australia must not spend money that has been paid to it by the Commonwealth unless it does so in accordance with the Funding Agreement.

On 2 June 2015, Wine Australia entered into such agreement with the Commonwealth, represented by the Department of Agriculture and Water Resources (Department).

Wine Australia entered into a further Funding Agreement with the Department on behalf of the Commonwealth of Australia which commenced on 14 May 2020. A copy of the current Statutory Funding Agreement is available on our website .

The Funding Agreement is complemented by:

- RDC Companion Document (developed in conjunction with the 2020–30 Funding Agreement)
- Wine Australia’s *Best Practice Guide to Stakeholder Consultation* (provided to Wine Australia by the Minister in December 2021)
- *Guidelines for Statutory Funding Agreements* (provided to Wine Australia by the Minister in November 2021)
- *RDC Knowledge Transfer and Commercialisation Guide* (provided to Wine Australia by the Minister in November 2021).

## Incorporation of best practice principles in governance and reporting

Wine Australia is expected to incorporate the following best practice principles into its governance and reporting:

- the Performance Principles contained in the Funding Agreement and complemented by the RDC Companion Document developed in conjunction with the 2020–30 Funding Agreement, and the Guidelines for Statutory Funding Agreements provided to Wine Australia by the Minister in November 2021, and
- the best practice principles set out in:
  - Wine Australia’s *Best Practice Guide to Stakeholder Consultation*
  - National Agricultural Innovation Policy Statement
  - *RDC Knowledge Transfer and Commercialisation Guide*.



## Performance Principles

The Funding Agreement obliges Wine Australia to act in accordance with specified Performance Principles and Guidelines.

We demonstrate our performance against the Performance Principles and Guidelines to levy payers and other stakeholders by reporting against them in our Annual Report.

The Performance Principles are summarised as follows:

**Stakeholder engagement** – Wine Australia must engage stakeholders to identify RD&A priorities and activities that provide benefits to the sector.

**Balanced Portfolio** – Wine Australia must ensure RD&A (and marketing) priorities and activities are strategic, collaborative and targeted to improve profitability, productivity, competitiveness and preparedness for future opportunities and challenges through a Balanced Portfolio. Balanced Portfolio is defined as meaning an RD&A investment portfolio incorporating an appropriate blend of issues of national importance based on government and levy payer priorities that seeks to balance short-, medium- and long-term investments, high- and low-risk, and strategic and adaptive research needs including consideration of regional variations and needs.

**Collaboration** – Wine Australia must undertake strategic and sustained cross-industry and cross-sectoral collaboration that addresses shared challenges and draws on experience from other sectors.

**Governance** – Wine Australia must implement governance arrangements and practices to fulfil legislative requirements and align with contemporary Australian best practice for open, transparent and proper use and management of funds.

**Performance** – Wine Australia must demonstrate positive outcomes and delivery of RD&A (and marketing) benefits to levy payers and the Australian community and show continuous improvement in governance and administrative efficiency.

The KPIs pertaining to the Performance Principles are set out in table 4.

The Guidelines are:

- the Australian Government's Science and Research Priorities
- the Australian Government's National Agricultural Innovation Priorities
- the National Primary Industries Research Development and Extension Framework
- the Levy Principles and Guidelines, being the guidelines relating to the introduction of new levies or changes to existing levies
- the Companion to the Research and Development Corporations Funding Agreement prepared by the Department, and
- other guidelines or priorities about which the Commonwealth notifies Wine Australia in writing from time to time.

**Table 4: Performance Principle KPIs**

| Performance Principle   | KPIs   |
|---|--|
| Performance Principle 1: Stakeholder Engagement                               | <p>1.1. Strategy prioritisation and development processes include appropriate consultation plans, based on the <i>Best practice guide to stakeholder consultation</i>.</p> <p>1.2. Demonstrated industry stakeholder engagement in the identification of RD&amp;E priorities and activities consistent with the consultation plan in 1.1.</p> <p>1.3. Demonstrated incorporation of industry stakeholder feedback on RD&amp;E priorities and activities. Where incorporation is not possible, demonstration of feedback to a stakeholder</p>   |
| Performance Principle 2: Research Development and Extension (RD&E) activities | <p>2.1. RDC investments align with strategic plans and have demonstrated outcomes to levy payers and taxpayers, including through growth in the industry, increased profitability of producers, commercialisation, access to new markets.</p> <p>2.2. Levy payers who participate in RDC supported extension and adoption programs:</p> <ul style="list-style-type: none"> <li>– gain new knowledge or new information to improve their long-term profitability, productivity, competitiveness and preparedness.</li> <li>– intend to make or have made changes to existing practices by adopting the outcomes of R&amp;D</li> </ul> |
| Performance Principle 3: Collaboration  | <p>3.1. Completed, current and future R&amp;D including commercialisation opportunities is accessible through the growAG platform.</p> <p>3.2. Number and quantum of cross-industry and cross-sector RD&amp;E investments available.</p>   |
| Performance Principle 4: Governance   | <p>4.1. Ongoing oversight, planning and reporting of investment activities is done in accordance with legislative and Australian Government requirements and timeframes.</p> <p>4.2. Demonstrated management of financial and non-financial risk.</p> <p>4.3. Relevant policies and procedures adopted and implemented (e.g., privacy etc).</p> <p>4.4. Non-financial resources implemented effectively (Human resources, IT, IP etc).</p>   |
| Performance Principle 5: Monitoring and Evaluation                            | <p>5.1. Impact (cost – benefit) assessment of a broad cross-section of RD&amp;E [and marketing] investments undertaken annually.</p> <p>5.2. Demonstrated consideration of and response to outcomes of monitoring and evaluation processes.</p> <p>5.3. Transparent communication to stakeholders (including government) on the impacts and benefits of the RD&amp;E [and marketing] activities.</p>   |

# Alignment with Australian Government priorities

**Table 5: Science and Research Priorities**

| Wine Australia strategies  | Food 1.1<br>\$000 | Food 1.3<br>\$000 | Soil and Water<br>2.2<br>\$000 | Soil and Water<br>2.3<br>\$000 | Advanced<br>manufact. 7.1<br>\$000 | Advanced<br>manufact. 7.2<br>\$000 | Environmental<br>Change 8.3<br>\$000 | Total<br>\$000  |
|--|-------------------|-------------------|--------------------------------|--------------------------------|------------------------------------|------------------------------------|--------------------------------------|-----------------|
| Strategy 2: Protect the reputation of Australian wine                |                   | 0<br>0.10%        |                                |                                |                                    |                                    |                                      | 0<br>0.10%      |
| Strategy 3: Enhance grape and wine excellence                        |                   | 8.7<br>36.50%     |                                |                                | 2.5<br>10.50%                      | 0.1<br>0.40%                       | 1.5<br>6.30%                         | 12.8<br>53.60%  |
| Strategy 4: Grow sustainable environments                            |                   | 4.9<br>20.40%     | 0.6<br>2.60%                   |                                |                                    |                                    | 2.1<br>8.90%                         | 7.6<br>31.80%   |
| Strategy 5: Build business sustainability, excellence and leadership | 0.2<br>1.00%      | 2.8<br>11.60%     | 0.1<br>0.50%                   | 0.1<br>0.30%                   | 0.1<br>0.40%                       | 0<br>0.10%                         | 0.2<br>0.70%                         | 3.4<br>14.40%   |
| Total  | 0.2<br>1.00%      | 16.4<br>68.60%    | 0.7<br>3.00%                   | 0.1<br>0.30%                   | 2.6<br>10.90%                      | 0.1<br>0.50%                       | 3.8<br>15.80%                        | 23.9<br>100.00% |

**Table 6: National Agricultural Innovation Priorities**

| Wine Australia strategies  | Australia is a trusted exporter of premium food and agricultural products by 2030<br>\$000 | Australia will champion climate resilience to increase the productivity, profitability and sustainability of the agricultural sector by 2030<br>\$000 | Australia is a world leader in preventing and rapidly responding to significant pests and diseases through futureproofing our biosecurity system by 2030<br>\$000 | Australia is a mature adopter, developer, and exporter of digital agriculture by 2030<br>\$000 | Total<br>\$000  |
|--|--|---|---|--|-----------------|
| Strategy 2: Protect the reputation of Australian wine                | 0<br>0.10%   |   |   |  | 0<br>0.10%      |
| Strategy 3: Enhance grape and wine excellence                        | 8.4<br>35.10%  | 3<br>12.40%   | 1<br>4.20%  | 0.5<br>2.00%   | 12.8<br>53.60%  |
| Strategy 4: Grow sustainable environments                            | 1.4<br>5.90%   | 2.8<br>11.80%   | 3.1<br>12.90%   | 0.4<br>1.70%   | 7.7<br>32.30%   |
| Strategy 5: Build business sustainability, excellence and leadership | 0.9<br>4.00%   | 1.5<br>6.30%  | 0.6<br>2.30%  | 0.4<br>1.50%   | 3.3<br>14.00%   |
| Total  | 10.7<br>45.00%   | 7.3<br>30.40%   | 4.6<br>19.40%   | 1.2<br>5.20%   | 23.9<br>100.00% |



## A balanced portfolio

Table 7: RD&A investment by project term

| Project term       | Number of projects |      | Budget 2022-23 |      |
|--------------------|--------------------|------|----------------|------|
| short (<2 years)   | 24                 | 26%  | \$3.3          | 14%  |
| medium (2-4 years) | 49                 | 54%  | \$12.4         | 52%  |
| long (>4 years)    | 18                 | 20%  | \$8.2          | 34%  |
| Total              | 91                 | 100% | \$23.9         | 100% |

Figure 5: RD&A investment by project term

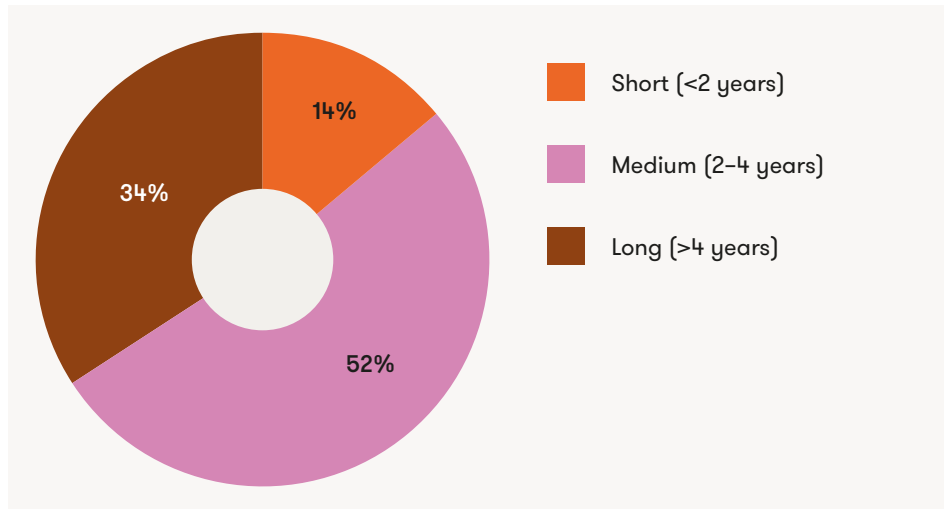


Table 8: RD&A investment by risk category

| Risk   | Number of projects |      | Budget 2022-23 |      |
|--------|--------------------|------|----------------|------|
| low    | 38                 | 42%  | \$2.6          | 11%  |
| medium | 21                 | 23%  | \$12.7         | 53%  |
| high   | 32                 | 35%  | \$8.6          | 36%  |
| Total  | 91                 | 100% | \$23.9         | 100% |

Figure 6: RD&A investment by risk category

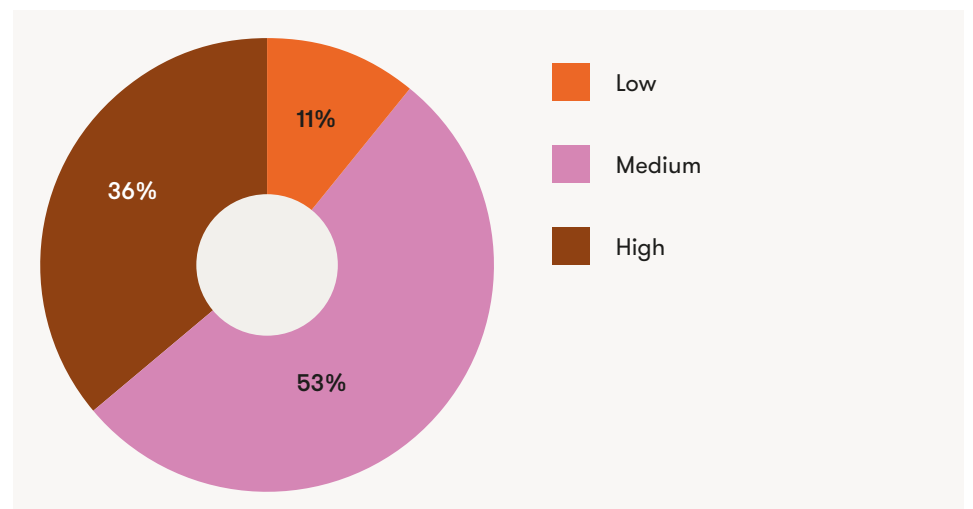


Table 9: RD&A investment by research type

| Research type | Number of projects |      | Budget 2022-23 |      |
|---------------|--------------------|------|----------------|------|
| Extension     | 24                 | 26%  | \$5.0          | 21%  |
| Capability    | 30                 | 33%  | \$0.8          | 4%   |
| Strategic     | 20                 | 22%  | \$14.2         | 59%  |
| Adaptive      | 17                 | 19%  | \$3.9          | 16%  |
| Total         | 91                 | 100% | \$23.9         | 100% |

Figure 7: RD&A investment by research type

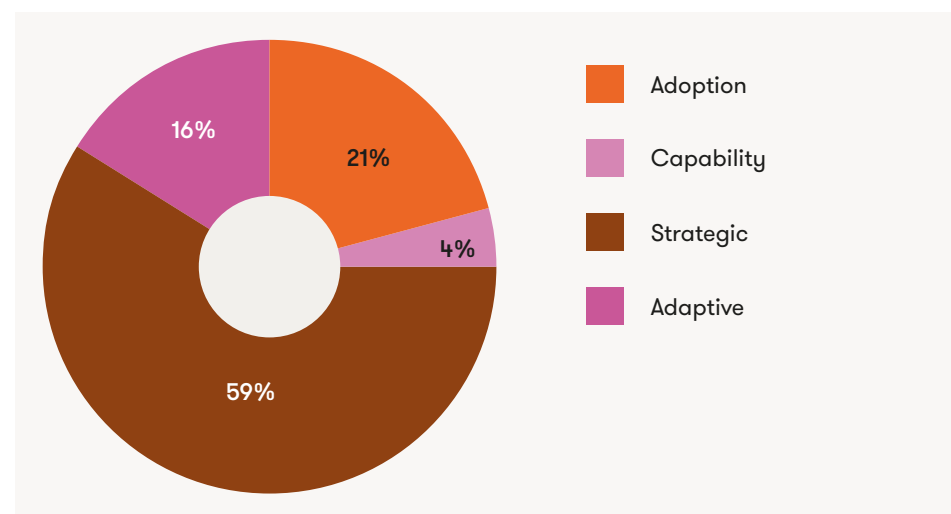
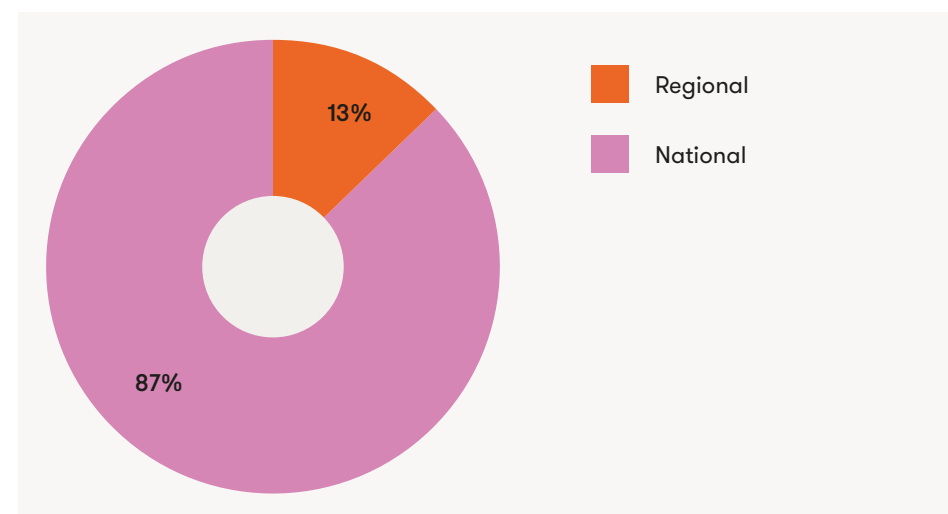


Table 10: RD&A investment by geographical focus

| Geographic focus | Number of projects |      | Budget 2022-23 |      |
|------------------|--------------------|------|----------------|------|
| Regional         | 12                 | 13%  | \$3.0          | 13%  |
| National         | 79                 | 87%  | \$20.9         | 87%  |
| Total            | 91                 | 100% | \$23.9         | 100% |

Figure 8: RD&A investment by geographical focus



# Risk management

Our risk management framework is aligned with and reflects existing standards and guidance such as AS/NZS ISO 31000:2018 – Risk management – Principles and guidelines.

We engage with risk in our operating environment to deliver programs that are innovative, efficient and dynamic. Our positive risk culture promotes an open and proactive approach to managing risks.

We recognise that it is not possible, nor necessarily desirable, to eliminate all of the risks inherent in our work. Accepting some degree of risk in our business practices promotes efficiency and innovation.

We are willing to accept higher levels of risk when the potential benefits outweigh the negative consequences of the risks. In doing so, we must be able to demonstrate that we have made informed, evidence- and risk-based decisions.

We acknowledge that identifying opportunities and capitalising on those opportunities to improve the overall performance of Wine Australia is a key component of meeting our corporate goals. We have set risk tolerances across six risk categories to guide the ways in which we engage with risk.

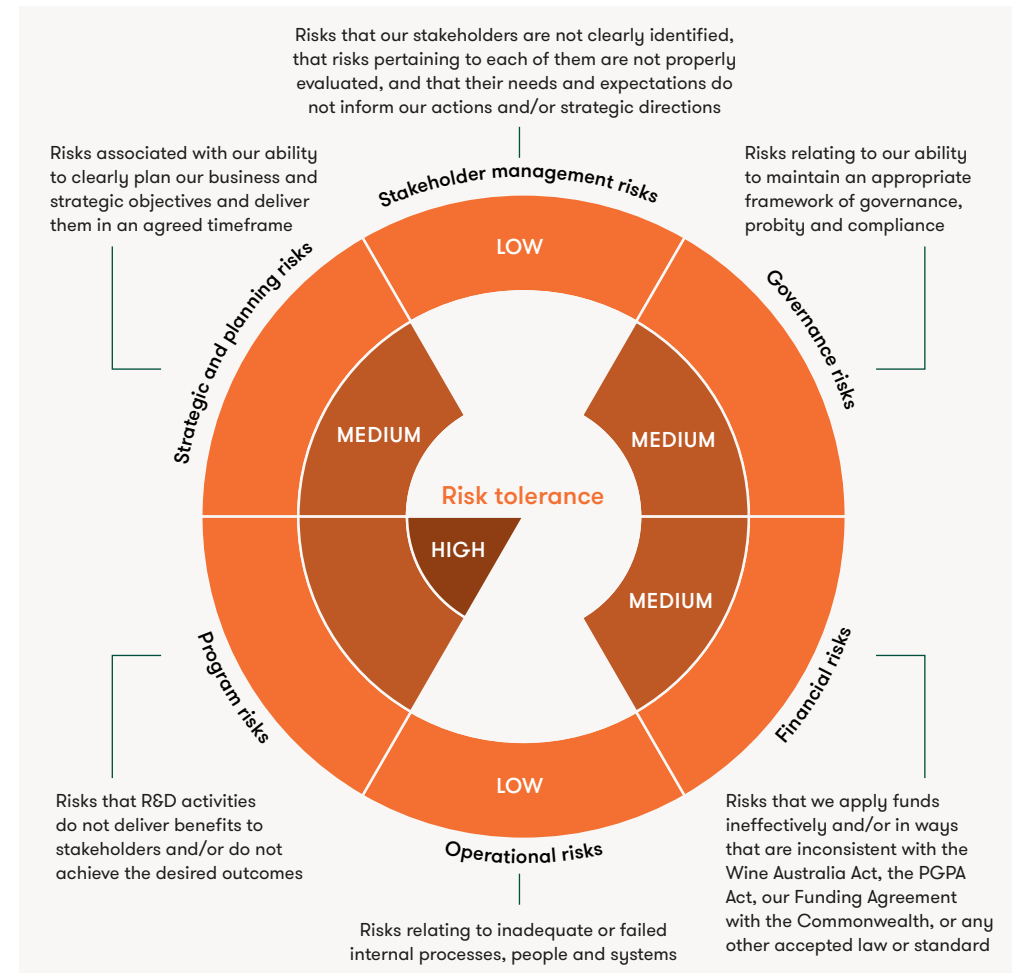
Risk management is a role that is shared across the entire organisation. All employees have a responsibility to identify, assess, report and, where appropriate, take corrective action to mitigate risks that are outside the agreed tolerance levels.

Resources are allocated appropriately to ensure that risk management can continually improve, with the early identification and treatment of potential risk factors.

At an operational level, risk is managed through regular meetings of the Risk Management Committee, which provides risk reports to each meeting of the Audit and Risk Committee.

Risk is included as a standing agenda item at each meeting of the Audit and Risk Committee and reports are provided to the Board periodically.

In 2022–23, we will ensure that our risk tolerance remains fit-for-purpose and we will continually assess strategic and operational risks to ensure that risks are managed in accordance with our established risk management practices.



# Appendices

## Appendix 1: Current RD&A projects

### Strategy 2: Protect the reputation of Australian wine

|          |  |
|----------|--|
| WAC 1912 | Investigate market access impediments and opportunities for Australian wine by attendance at meetings of the International Organisation of Vine and Wine (OIV) |
|----------|--|

### Strategy 3: Enhance grape and wine excellence

|                |   |
|----------------|---|
| CSA 1701       | Strategic Research Agreement  |
| AWR 1701       | Wine Australia-AWRI Investment Agreement (AWR 1701)                       |
| DIGITAL & DATA | Strategic Research Projects   |
| AGTECH         | Agtech program  |
| UA 1602        | Understanding the drivers of terroir in the Barossa Valley                |
| UA 1803        | Strategic Research Agreement  |
| WA 1908        | Assessing the practicality of the robot platforms from swarmfarm robotics |
| FOV 2201       | National Grapevine Collection Coordinator                                 |
| INN 2101       | NOLO project developments   |

### Strategy 4: Grow sustainable environments

|           |                              |
|-----------|------------------------------|
| SAR 1701  | Strategic Research Agreement |
| SWA       | SWA - Sustainability         |
| CRC_SAAFE | Fungicide resistance project |
| CRC-P     | CRC-P opportunity            |
| GRAPE     | Strategic Research projects  |
| CLIMATE   | Strategic Research projects  |
| RD        | Roadmap development          |

|            |  |
|------------|--|
| ACR        | Agro Chemical registrations  |
| COVER CROP | Adoption program to build cover crops and biodiversity best-practice                         |
| PHA 1801   | Review of the Biosecurity Plan and Manual for the Viticulture Industry                       |
| VIB 1901   | Update and review of Viticulture Industry Biosecurity Plan (VIBP)                            |
| WA 1906    | National Working Party in Pesticide Applications (NWPPA) Stakeholder Contribution            |
| WA 1909    | Novel technologies to assist rapid and sensitive detection of Brown Marmorated Stink Bug     |
| UQ 2001    | ARC Research Hub for Sustainable Crop Protection   |
| HIA 2001   | Plant Biosecurity Research Initiative Phase II Collaboration and Funding Agreement 2021-2023 |
| WA 2001    | Xylella Insect Vectors (Co-funded Hort Innovation)   |
| DJP 2001   | Integrated management of grapevine phylloxera: Phase II                                      |
| LTU 2003   | North East Victoria vineyard smoke sensor network  |

### Strategy 5: Build business sustainability, excellence and leadership

|                |  |
|----------------|--|
| ALUMNI SUPPORT | Alumni Support   |
| ASV 2000       | ASVO Partnership and practice change funding - Collaboration Agreement |
| CRC900         | CRC One basin  |
| CRRDC          | Council of Rural R&D Corporations - CRRDC                              |
| GRP 1701       | Regional Plan - Riverina 2017-23                                       |
| GRP 1702       | Regional Plan - Greater Victoria 2017-23                               |
| GRP 1703       | Regional Plan - Tasmania 2017-23                                       |

|           |  |
|-----------|--|
| GRP 1704  | Regional Plan – SA North 2017–23   |
| GRP 1705  | Regional Plan – Murray Valley 2017–23  |
| GRP 1706  | Regional Plan – Limestone Coast 2017–23  |
| GRP 1707  | Regional Plan – SA Central 2017–23   |
| GRP 1708  | Regional Plan – Greater NSW & ACT 2017–23  |
| GRP 1709  | Regional Plan – Western Australia 2017–23  |
| GRP 1710  | Regional Plan – Queensland 2017–23   |
| GRP 1711  | Regional Plan – Riverland 2017–23  |
| MI        | Market Intelligence and Research data  |
| PE        | Project Performance Evaluation   |
| PPLDEV    | People Development Projects – career/workforce/workshop  |
| UA Ph2101 | Use of activated carbon fabrics to mitigate smoke taint in grapes and wine   |
| UA Ph2102 | The role of polysulfides in the appearance of ‘reduced’ wine aromas  |
| UA Ph2103 | Driving the image and growth of NOLO wines in Australia and key export markets   |
| VINSITES  | VinSites   |
| WA Ph1904 | Science to inform decision making between synthetic and alternative nitrogen sources in vineyards                                      |
| WA Ph1905 | From Brandewijn (burnt wine) to bush fires: new directions in Australian Brandy production   |
| WA Ph1907 | The molecular epidemiology and control of grapevine pinot gris virus in Australian viticulture   |
| WA Ph1908 | A regional study of the effects of vineyard floor management on soil health, biodiversity and terroir expression                       |
| WA Ph1913 | Wine production in a changing Australian climate: water addition to musts and the effects on phenolic, chemical and sensory attributes |
| WA Ph2000 | Implementation of agroecological practices in viticulture: identification of factors that motivate or constrain uptake                 |

|           |   |
|-----------|---|
| WA Ph2001 | Engineering biosensors of wine spoilage   |
| WA Ph2002 | Engineering biosensors of smoke taint   |
| WA Ph2003 | Mitigating taint in wine due to vineyard exposure to bushfire smoke   |
| WA Ph2004 | Photocatalytic treatment of winery wastewater using Au clusters deposited mesoporous TiO <sub>2</sub>   |
| WA Ph2005 | Understanding the relative sustainability of harvesting pruned vineyard biomass and the effect on carbon sequestration and disease management |
| WA Ph2006 | Essays in wine economics  |
| WA Ph2007 | Comparison of soil, vine, and environmental metrics to optimise vineyard irrigation scheduling  |
| WA Ph2009 | Genetic basis of salt exclusion in grapevine  |
| WA Ph2100 | Developing and applying climate smart and biochar-based innovative technologies for viticulture future in southeast Queensland                |
| WA Ph2101 | The Wine Provenance Project: blockchain-enabled wine labels, a new era for consumer trust?  |
| WA Ph2102 | Alternatives to sulfur dioxide for controlling Brettanomyces spoilage in wine   |
| WA Ph2103 | Phycosol – a novel and integrated approach for sustainable winery wastewater treatment for enhancing circular economy                         |
| WA Ph2104 | Inter-vine signalling via plant volatiles   |
| WA Ph2105 | Bait lamina probe as a farmer friendly tool for assessing soil biological activity  |
| WA Ph2106 | Alternate strategies and vineyard practices for reducing the risk of grapevine trunk diseases   |
| WA Ph2107 | Vines, wines and microbiomes: the impact of fungicides on the phyllosphere microbiome of grapevines used for winemaking                       |
| WAC 2007  | Future Leaders 2021   |
| WAC 2111  | Deliver the Next Crop leadership program for the Greater Victoria Region  |
| WAC 2112  | Deliver the Next Crop leadership program for the Clare Valley Region  |
| WAS 2000  | Agriculture Innovation Australia (AIA) – RDC joint investment organisation  |



## Appendix 2: Glossary

|                         |  |
|-------------------------|--|
| ABEI                    | Australian Government's Agricultural Business Expansion Initiative                 |
| ATMAC                   | the Australian Government's Agricultural Trade and Market Access Cooperation grant |
| Australian Grape & Wine | the peak sector member-based organisation  |
| AWRI                    | Australian Wine Research Institute   |
| CRC                     | Cooperative Research Centre  |
| ELLIS                   | Export Label Image Search System   |
| EMEA                    | Europe, Middle East and Africa   |
| KPIs                    | key performance indicators   |
| LIP                     | Wine Australia's Label Integrity Program   |
| OIV                     | International Organisation of Wine and Vine  |
| RDC                     | Research and Development Corporation   |
| RD&A                    | research, development and adoption   |
| RD&E                    | research, development and extension  |
| R&D                     | research and development   |
| the Act                 | <i>Wine Australia Act 2013</i>   |
| WALAS                   | Wine Australia Licensing and Approval System                                       |



**Australian Government**

**Wine Australia**

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Wine Australia supports a competitive wine sector by investing in research, development and adoption (RD&A), growing domestic and international markets, protecting the reputation of Australian wine.

Wine Australia is an Australian Commonwealth Government statutory authority, established under the Wine Australia Act 2013, and funded by grape growers and winemakers through levies and user-pays charges and the Australian Government, which provides matching funding for RD&A investments.