

A photograph of a vineyard at sunset. The sun is low on the horizon, creating a warm, golden glow. The leaves of the grapevines are silhouetted against the bright light, with some leaves showing a greenish-yellow hue. The background is a soft, hazy landscape.

Wine  
Australia

# Strategic Plan 2020–25



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# Executive summary

## Our strategic direction to 2025

Welcome to Wine Australia's *Strategic Plan 2020–25*, which details how we will invest your levies and other fees along with the Australian Government's matching funding over the next five years to assist you to be profitable, resilient and sustainable.

This plan builds on the improved performance of the Australian winegrape and wine sector over the last five years, both domestically and internationally. Exports account for 60 per cent of wine produced and the value of annual exports has increased from \$1.89 billion to \$2.91 billion since 2015. Australian wine holds a 79 per cent value share in the domestic market and, as in our mature export markets, there is a move to premiumisation, with Australians consuming less wine per person and spending more per bottle.

This growth is also reflected in grape prices; 2019 was the fifth consecutive vintage of increases in the average purchase price of winegrapes, to \$664 per tonne.

This growth is contributing to the sector's long-term sustainability but we can't rest on our laurels, as many significant challenges lie ahead, given the global disruption caused by the COVID-19 pandemic.

This plan is for growers, wine producers and exporters. We've spent 12 months talking with you to understand your priorities.

You told us that we should focus on:

- growing value and premiumisation across all price points to deliver profitability
- increasing exports in a diverse range of markets, while keeping an eye on the domestic market
- supporting wine tourism
- innovation, particularly in viticulture, which will be a key differentiator for Australia and where the big gains can be made
- climate challenges, noting that Australia's flexibility in production is a strength
- sustainability, and
- biosecurity.

Each of these priorities is reflected in Australian Grape & Wine Incorporated's (AGW's) *Vision 2050*, which maps out the long-term aspirations for the sector.

Wine Australia's role through this *Strategic Plan 2020–25* is to set out how we will address these priorities in accordance with our remit. In preparing this plan, we have reflected on the achievements delivered under our *Strategic Plan 2015–20* and embraced new opportunities.

We also looked at what we still had to achieve from our last Plan and what we could do better. The United States (US) market remains a challenge and we need to continue striving to increase our market share of sales above \$11 per bottle. We also want to increase the speed with which the sector adopts the outcomes of research and development (R&D) and we will implement the recommendation from our extension and adoption review to accelerate adoption of new knowledge.

### The Export and Regional Wine Support Package

The Export and Regional Wine Support Package (\$50m Package) helped supercharge exports and regional wine tourism.

We will build on the enduring benefits of the \$50m Package, including our Australian Wine Made Our Way brand, the Australian Wine Discovered education platform, the Growing Wine Exports and Growing Wine Tourism capability programs and the Market Explorer tool.

We have five clear strategies:

1. **Market Australian wine** to increase the demand and the premium paid for all Australian wine
2. **Protect the reputation of Australian wine** by maintaining the reputation and integrity of Australian wine in all our markets, including the domestic market
3. **Enhance grape and wine excellence** with research outcomes that allow grapegrowers and wine producers to excel
4. **Grow sustainable environments** by providing knowledge and tools to support growers and producers in implementing environmental stewardship practices, and
5. **Build business sustainability, excellence and leadership** by accelerating the adoption of research outcomes and best practice.



In summary, as key elements of our new strategic direction we will:

- continue to strive to lift demand and the premium paid for all Australian wine by building on the fine-wine focus in our last Strategic Plan. We will champion great Australian wine and our diverse wine regions in the highly competitive international market to build awareness and the perception of quality
- using our Australian Wine Made Our Way brand, develop and deliver collective promotional activities that engage the trade, consumers and media, and supplement the promotional activities of individual companies
- pivot our marketing activities to increase social media and digital engagement and deliver more retailer and distributor promotions and an expanded education reach through Australian Wine Discovered
- make decisions informed by our market insights and targeted for the greatest impact. Our primary in-market activity focus will be Australia's key markets of China, Canada, the United Kingdom (UK) and the United States of America (USA)
- support our producers in emerging markets with targeted information and data, and by leveraging our trade networks to identify opportunities
- support the domestic market through strong education for consumers via [www.australianwine.com](http://www.australianwine.com) and Australian Wine Discovered
- build business sustainability, excellence and leadership so that businesses have access to the knowledge, tools and know-how to thrive. Our tools will include those developed through the \$50m Package, such as the Growing Wine Tourism and Growing Wine Exports capability programs and the Market Explorer Tool
- grow sustainable environments so that our sector is recognised for its stewardship of our precious natural resources. We will invest in research to allow the sector to benchmark its carbon emissions and waste production, and to deliver tools to adapt to or mitigate against the effects of climate change
- invest in research that enhances functional biodiversity and ensures the sector is better prepared to manage incursions of endemic and exotic pests and diseases
- increase our investment in accelerating adoption of relevant research outcomes in the vineyard and winery, including through support of agtech demonstration farms, and
- investigate traceability tools that will support our regulatory activities and ensure that the sector's integrity credentials are enhanced.

## Market outlook

The immediate market outlook for the Australian wine sector is extremely challenging, given the dislocation caused by COVID-19. Before the advent of COVID-19, the reduction in global supply in 2019, along with a favourable exchange rate for the Australian dollar against the US dollar and strong demand from Asian markets, suggested that there would be growing export opportunities for Australian wine producers in 2020 and beyond. However, the balance between supply, demand, price and international competition remains precarious. Supply and demand will continue to be affected by economic, environmental and social pressures outside the grape and wine sector's control, including the short- and medium-term impacts from the COVID-19 pandemic.

In the longer term, the geopolitical climate and market access remain vitally important to the sector's health. Increasingly, producing fine wines of high quality will be expected but not sufficient as a stand-alone measure, and our focus on growing sustainable environments and building business excellence and leadership will help the Australian grape and wine sector meet the challenges and opportunities of the future.



## Key performance indicators

We are accountable to our funders, the grapegrowers, wine producers and exporters who pay research and development (R&D) and marketing levies and export fees, and to the Australian Government, which matches eligible R&D investments.

We have clear measures of success for each strategy (see pages 12–13) so you can judge whether we've been successful or not.

We look forward to working with you.

### The COVID-19 pandemic

As we were finalising our plan for the next five years, the COVID-19 pandemic swept the globe, causing widespread disruption and grief. Acting swiftly, we postponed our international activities and changed how we delivered our key services to support the sector as the situation unfolded.

It is too early to understand the medium- and long-term impacts of the pandemic on the Australian wine sector, consumers, businesses, tourism and supply chains but, given the potential scale and impact of the disruption, we plan to comprehensively review, adapt and evolve our strategic direction as necessary to ensure that we are effectively supporting the Australian grape and wine community by investing for the sector's success. We will do this in consultation with our representative body, AGW. Our *Annual Operational Plan 2020–21* will detail how we will shape our investments to rise to these challenges.

**Table 1:** Key priorities identified during stakeholder consultation

You told us...	In response, we are...
<i>'Our future lies in growing the value of our product rather than the volume, and growing exports must be a strong focus'</i>	Pursuing our strategy to increase the demand and the premium paid for Australian wine at all price points, through focused, data-driven promotional activities – Australian Wine Made Our Way
<i>'There is a great opportunity to grow the partnership between wine, tourism and food in the Australian market'</i>	Delivering the resources developed in the National Online Wine Tourism Package and the Growing Wine Tourism capacity-building program
<i>'We value highly the sector's regulatory framework and efforts to protect the integrity and reputation of Australian wine'</i>	Maintaining our compliance and enforcement activities, while also looking for more efficient ways to ensure our product integrity through new traceability technologies
<i>'Innovation will be a key driver of our success – not just in grapegrowing and winemaking, but in packaging, distribution and all other aspects of our offer'</i>	Continuing to invest in a range of R&D projects, with a focus during the life of this Strategic Plan on accelerating the adoption of innovation, including agtech, through modern, producer-led initiatives
<i>'Sustainability (water, waste, chemicals) is critical to our future, and we must be part of conscientious societal responses to challenges in these areas'</i>	Increasing our focus on sustainability, by developing new tools and practices and actively supporting the sector's Sustainable Winegrowing Australia program to gather data to support sector targets and provide support for market assurance programs
<i>'We must be able to better respond to climate change'</i>	Developing adaptation strategies such as early-warning systems and remediation for water scarcity, smoke and other impacts of climate change, as well as direct mitigation strategies to position grape and wine production in a climate-challenged world
<i>'Biosecurity and the protection of our unique germplasm must be strengthened if we are to maintain our competitive advantage in plant health'</i>	Investing in research, development and adoption (RD&A) to breed disease- and pest-resistant varieties and rootstocks, develop new tools and practices to improve biosecurity and disease control, and support sector initiatives to strengthen biosecurity policy and governance
<i>'We must attract and retain skilled people, including those who can manage data, agtech, digital marketing and other aspects of modern wine businesses'</i>	Expanding our role as a provider of market intelligence, technical data and information, as well as working with the education sectors so that they deliver courses that address the sector's needs

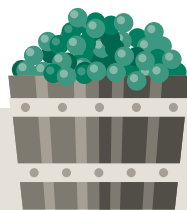




# Our operating environment

## Wine sector snapshot

### Our vineyards and wineries



65

WINEMAKING REGIONS



WINE GRAPES GROWN IN  
EVERY AUSTRALIAN STATE

6,251

WINEGRAPE GROWERS

146,244

HECTARES PLANTED  
TO WINE GRAPES

2,468

WINERIES

1.2b

LITRES OF WINE PRODUCED

\$7.12

AVERAGE VALUE OF BOTTLED  
EXPORTS IN 12 MONTHS TO MARCH  
2020, UP FROM \$4.90 IN 2014-15

8.4m

VISITS TO WINERIES  
FROM DOMESTIC AND  
INTERNATIONAL TRAVELLERS

### Our sector



\$3.5b

DOMESTIC MARKET

9%

OF ALL AGRICULTURAL EXPORTS

\$2.87b

EXPORT MARKET

\$45.5b

CONTRIBUTION TO THE  
AUSTRALIAN ECONOMY

\$6.4b

TOTAL WINEMAKER REVENUE

\$2.04m

AUSTRALIAN ECONOMY GAIN FOR  
EVERY ADDITIONAL \$1 MILLION OF  
GROSS OUTPUT BY THE WINE SECTOR

\$12.0b

WAGES AND SALARIES  
PER ANNUM

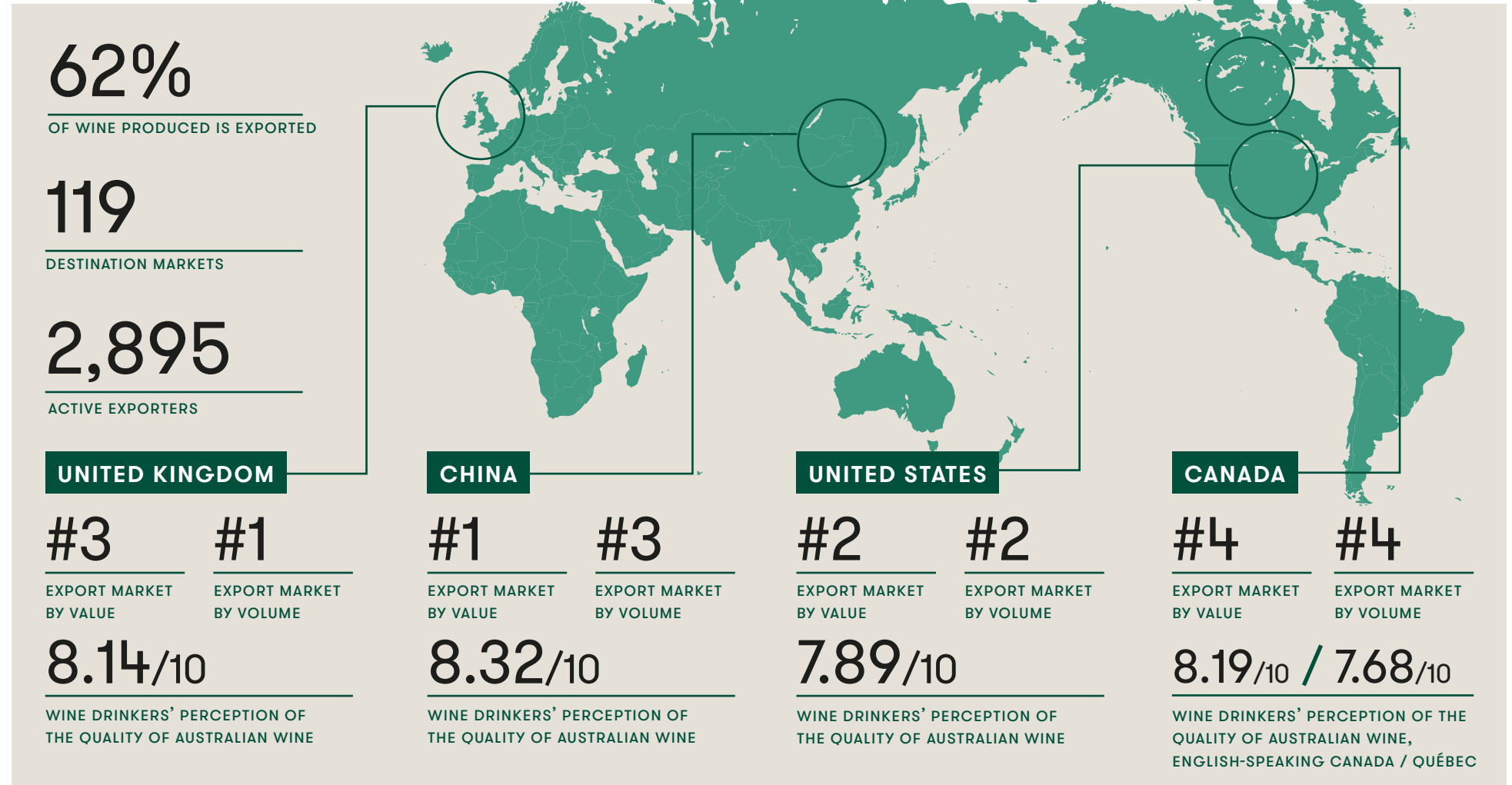
163,790

DIRECT AND INDIRECT  
FULL- AND PART-TIME JOBS



# Our operating environment

## Our markets



# Wine Australia

## What we do

We invest for the sector's success.

Our powers and responsibilities come from the *Wine Australia Act 2013* (the Act) that also sets our role, which is to:

- coordinate or fund grape and wine research and development, 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.

We seek to foster and encourage profitable, resilient and sustainable Australian winegrape and wine businesses by investing in research and development, building markets, disseminating market information and knowledge, encouraging adoption and ensuring compliance through our regulatory functions.

Our governance and operations seek to achieve the best possible return on the investment of our RD&A, marketing and regulatory funds.



## Our funding sources

We are funded by grapegrowers and winemakers through levies and user-pays charges, and by the Australian Government, which provides matching funding for RD&A investments.

We have four primary sources of funding:

### RD&A funding

- The grape research levy (grapegrowers pay \$2 per tonne of winegrapes crushed) and the R&D component of the wine grape levy (wine producers pay \$5 per tonne of winegrapes crushed) are matched dollar-for-dollar by the Australian Government.
- Projected RD&A funding for the five years 2020–25 is \$120 million.

### Marketing funding

- Wine producers pay the promotion component of the wine grape levy in a stepped amount per tonne. The promotion component is payable on grapes delivered to a winery once the threshold of 10 tonnes has been reached.
- Wine exporters pay the wine export charge on wine produced in and exported from Australia. The amount of levy payable is based on the free-on-board (FOB) sales value of wine for the levy year.
- Projected marketing funding from levies for the five years 2020–25 is \$20 million.

### Regulatory funding

- Regulatory activities are funded on a cost-recovery basis through activity-based fees.
- Projected regulatory funding for the five years 2020–25 is \$35 million.

### User-pays activities

- Wine businesses, regional associations and state governments pay voluntary contributions to participate in marketing activities.
- Projected user-pays contributions for the five years 2020–25 amount to \$9 million.

## Our relationships

As the RD&A, marketing and compliance organisation for the Australian grape and wine community, we work in partnership with a wide range of stakeholders along the supply chain. We engage in extensive consultation with these stakeholders – from grapegrowers, winemakers and government to research providers, international regulators, the wine trade, media and consumers.

AGW is our representative organisation under the Act. It is the national sector body that represents Australia's grape and wine producers on political, social and regulatory issues across the production and supply chain.

In 2020, AGW launched *Vision 2050*, the Australian grape and wine sector's 30-year strategy. This strategy guides and informs our priorities and investments.

The Australian Government is a co-contributor of RD&A funding. We also work closely with the Australian Government to enhance market opportunities and reduce barriers to trade.

Our research providers include the Australian Wine Research Institute (AWRI), the Commonwealth Scientific and Industrial Research Organisation (CSIRO), the National Wine and Grape Industry Centre (NWGIC), universities and state agencies. The bulk of the wine sector's RD&A capability resides in the Wine Innovation Cluster of the Waite precinct in Adelaide, which comprises AWRI, CSIRO, the South Australian Research and Development Institute and the University of Adelaide.

We have bilateral RD&A agreements with each of the partner organisations of the Wine Innovation Cluster, as well as the NWGIC, a collaboration between Charles Sturt University, the NSW Department of Primary Industries and the NSW Wine Industry Association.

We invest with other research and development corporations (RDCs) in cross-sectoral collaborative research to deliver RD&A benefits to the broader community.

We collaborate with our marketing partners on international engagement. These partners include wine businesses, Australian Government agencies such as Tourism Australia and Austrade, regional associations, state governments and other RDCs with market-development responsibilities.





# Setting our vision, goal and strategies

The Wine Australia Board sets our five-year strategy, which is approved by the Minister for Agriculture, Drought and Emergency Management, as set out in our Act.

Our Board is guided by the vision, goals and priorities of our funders, as elucidated in *Vision 2050* for the Australian grape and wine sector and in the Science and Research Priorities and Rural Research, Development and Extension Priorities of the Australian Government. In concert with AGW, we consulted extensively with our stakeholders to understand their priorities, which are reflected in *Vision 2050* and this Strategic Plan.

In *Vision 2050*, the Australian grape and wine sector identified its vision:

*Australian wine: enjoyed and respected globally*

and its goal:

*Profitable, resilient and sustainable winegrape and wine businesses.*

This vision and goal establish our long-term aims and, with the Australian Government's priorities, inform our strategies – how we will invest for the sector's success. Our strategies also reflect the priorities of our stakeholders, gathered through extensive consultation in conjunction with AGW.

## Our strategies are to:

1. Market Australian wine
2. Protect the reputation of Australian wine
3. Enhance grape and wine excellence
4. Grow sustainable environments
5. Build business sustainability, excellence and leadership.

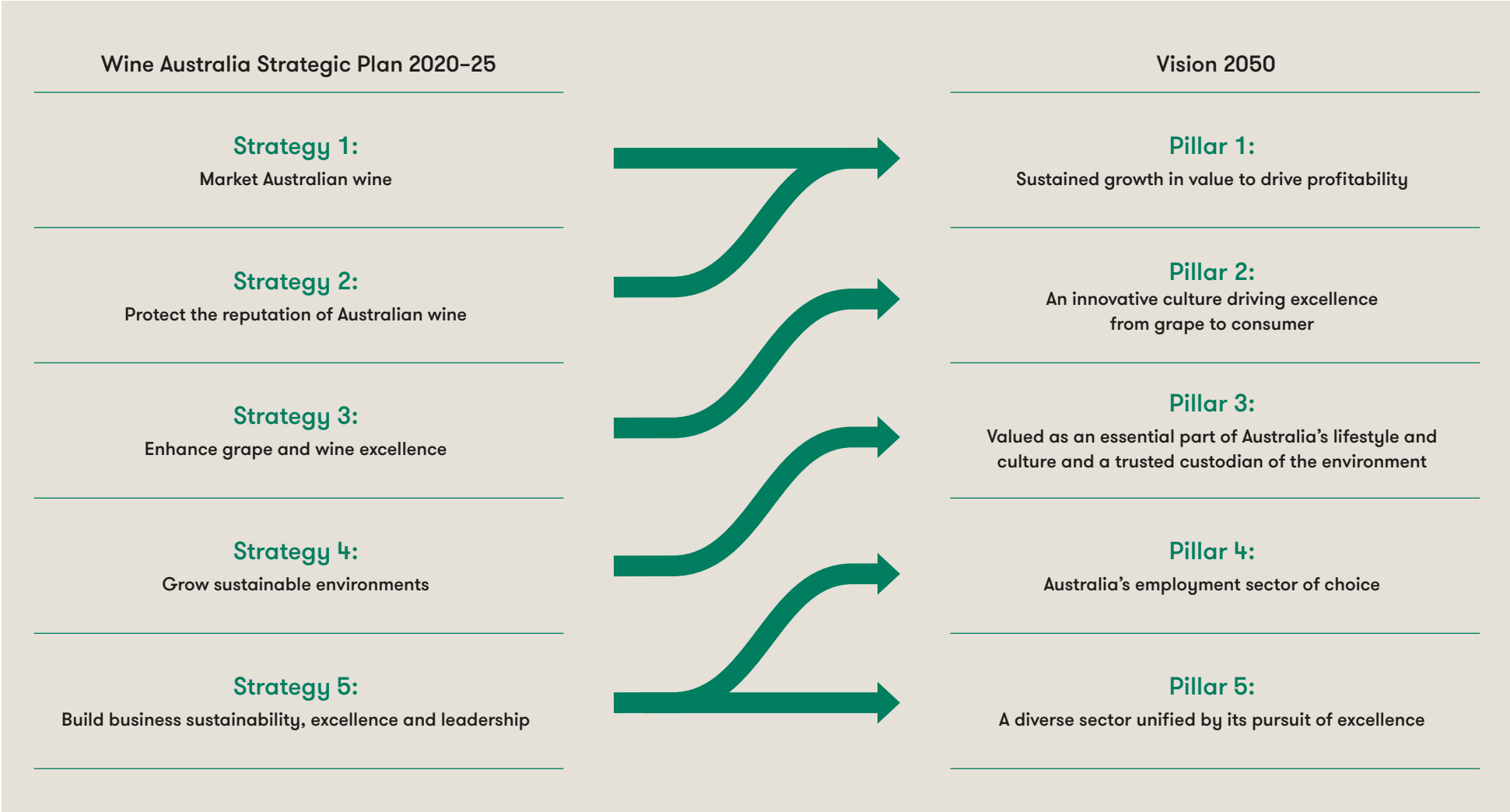
Figure 1: Wine Australia's five strategies



Our five strategies seek to achieve our responsibilities under the Act and contribute to *Vision 2050*’s five Pillars, as shown in the table below.

To maximise return on investment to our levy payers and the Australian taxpayer, we will operate effectively, efficiently and transparently as we deliver on these strategies.

Figure 2: Mapping Wine Australia’s five strategies to *Vision 2050*’s five pillars



# Delivering our strategies

## Key performance indicators

We believe that it is important to measure and assess the effectiveness, efficiency and transparency of our activities, investments and operations. We will measure our achievements against each strategy with the following key performance indicators (KPIs):



### Strategy 1:

- 85 per cent of Tier A influencers<sup>1</sup> actively engage with Wine Australia.
- The perception of Australian wine increases in China, Canada, the UK and the USA by 5 per cent in each market.
- *Vision 2050* 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.
- More than 90 per cent of our partners who participate in Wine Australia promotional activities are satisfied or very satisfied with the activity.

### Strategy 2:

- We achieve the six key performance indicators in our Regulator Performance Framework that embrace efficient operations, clear and effective communications, proportionate actions, streamlined and coordinated compliance and monitoring, transparency and continuous improvement.
- We establish a benchmark for consumer trust of Australian wine label claims through a customer survey in our five largest markets – Australia, China, the UK, the USA and Canada.
- We have assessed three new traceability technologies, including blockchain, and they are available to the sector for adoption.
- We deliver at least one streamlined regulatory process through cooperation with counterpart regulators in import markets.

1. 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.



### Strategy 3:

- Four enhanced or new grapevine varieties that are resistant to both downy and powdery mildew are available to the sector through plant breeding programs.
- Three new rootstocks are available to the sector through plant breeding programs.
- Four new or enhanced technologies and processes to improve vineyard efficiency and sustainability are available to the sector.
- The supply of genetically diverse and high-health planting material is maintained to the satisfaction of relevant stakeholders.
- Two new or enhanced technologies and processes, including agrifood technology (agtech) to improve grape and wine quality, winery efficiency and sustainability, are available to the sector for adoption.
- Three Wine Australia-funded projects have progressed to commercialisation.

### Strategy 4:

- New knowledge allows the sector to establish a carbon emissions benchmark.
- New knowledge allows the sector to establish waste production benchmarks.
- 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.
- A better understanding of vine water use contributes to better irrigation scheduling processes that allow more efficient and effective use of water.
- Research delivers clear information about the value of soil remediation processes and enhancing functional biodiversity.
- New and improved practices for the sustainable management of endemic pests and diseases are available to the sector.
- 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.
- The use of vineyard cover crops and soil remediation practices has increased by 10 per cent.
- The land area dedicated to enhancing functional biodiversity has increased by 10 per cent.
- Best-practice irrigation scheduling to optimise water use efficiency is adopted by an additional 30 per cent of growers in warm irrigated regions.

### Strategy 5:

- Of levy payers who participate in Wine Australia-supported extension and adoption programs:
  - 80 per cent consider them as a good or very good use of levy funds
  - 80 per cent have gained new knowledge or new information to improve their long-term profitability and sustainability
  - 50 per cent intend to make or have made changes to existing practices by adopting the outcomes of R&D
  - 80 per cent of those who've adopted agtech have a positive return on their investment.
- 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.
- 99 per cent of exporters have access to the information and knowledge to meet the requirements of the importing country.
- More than 90 per cent of market insights customers are satisfied or very satisfied with our market insights services.

We have two 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.

# Strategy 1:

## Market Australian wine



To help Australian wine be enjoyed and respected globally and to build profitable, resilient and sustainable winegrape and wine businesses, we strive to increase the demand and the premium paid for all Australian wine.

In five years' time, we will know we have been successful if:

- 85 per cent of Tier A influencers<sup>2</sup> actively engage with Wine Australia
- the perception of Australian wine increases in China, Canada, the UK and the USA by 5 per cent in each market
- *Vision 2050* 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, and
- more than 90 per cent of our partners who participate in a Wine Australia promotional activity are satisfied or very satisfied with the activity.

With our marketing activities, we aim to continually improve the perception of the quality of Australian wine, to create a platform for the commercial success of our brand owners and to facilitate in-market support and engagement for brand owners. This will help grow the profitability of the Australian grape and wine sector. We will build on the success of our unrelenting focus on fine wine, which has lifted international perception of the intrinsic quality of Australian wine.

Wine Australia does not sell wine; our focus is to promote Australia's entire wine offering. We will continue to focus our attention on improving customer perceptions of Australian wine quality in the premium segments, where we believe value growth will be strongest.

2. 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.

To do this, we will continue to build global understanding of Australia's broad and diverse offering and the range of terroirs and climates in our 65 wine regions.

This is a long-term strategy that is grounded in pragmatism and opportunity.

Our role is to help our winemakers and brand owners to put their best foot forward to win a greater share of the global alcohol beverage budget. Australian exporters from all wine regions want to capture a greater market share in our target markets at the following price points:

- Mainland China: >RMB200 per bottle
- Canada: >C\$15 per bottle
- UK: >GB£8 per bottle, and
- USA: >US\$11 per bottle.

Using our Australian Wine Made Our Way brand, one of the enduring benefits of the \$50m Package, we will develop and deliver collective promotional activities that engage the trade, consumers and media, and supplement the promotional activities of individual companies. Australian Wine Made Our Way provides a bold and exciting brand platform that the whole wine community can use to target the wine trade and influencers, with free, customisable resources that allow companies to supplement their branding collateral with an overarching celebration of Australian wine. Our messaging will be calibrated by market and reinforced by research that shows our customers' positive views of our wines: authentic, bold, exciting, clean and green, premium, safe, without equal, crafted and strong.

In the first year of this Strategic Plan, we will deliver the final in-market activities of the Australian Government's \$50m Package that were postponed in response to COVID-19. Building the trade's and consumers' knowledge about Australian wines will lead them to embrace higher price points and make Australian wine the natural choice of consumers in our key markets.

Our activities will be evidence-based and data-driven, informed by our market insights and targeted for the greatest impact. Our primary focus will be Australia's key markets of China, Canada, the UK and the USA. Ideally, we would also invest in other well-established and emerging markets, but we will not dilute our impact by spreading our efforts too thinly.

We will support brands that wish to export to other markets with data and market insights through the Market Explorer tool, export market guides that detail how to meet an importing country's regulatory requirements, capability building through the Growing Wine Exports program, and by partnering with Austrade and state governments.

With our comprehensive education program Australian Wine Discovered, we will continue to celebrate Australian wine and deepen the trade's and consumers' understanding of our people, places and stories. We will encourage further uptake by wine brands of this enduring benefit of the \$50m Package, which offers more than 200 globally accessible assets, including editable presentations, detailed information guides, videos, maps, tasting maps and more. Australian Wine Discovered will also be the core of our education activities.

We will pivot our marketing activities to:

- increase our social media and digital engagement
- deliver more retailer and distributor promotions, and
- expand our education reach through Australian Wine Discovered.

There will be a commensurate reduction in our presence at trade shows and trade tastings, which are resource-intensive and becoming less popular with the wine trade.





## Strategy 2:

# Protect the reputation of Australian wine



To help Australian wine be enjoyed and respected globally and to build profitable, resilient and sustainable winegrape and wine businesses, we will continue protecting the reputation of Australian wine.

In five years' time, we will know we have been successful if we have maintained the reputation and integrity of Australian wine in all our markets, including the domestic market. We will measure this success by:

- achieving the six key performance indicators in our Regulator Performance Framework that embrace efficient operations, clear and effective communications, proportionate actions, streamlined and coordinated compliance and monitoring, transparency, and continuous improvement
- establishing a benchmark for consumer trust of Australian wine label claims through a customer survey in our five largest markets – Australia, China, the UK, the USA and Canada.
- having assessed three new traceability technologies, including blockchain, and their being available to the sector for adoption, and
- delivering at least one streamlined regulatory process through cooperation with counterpart regulators in import markets.

Our robust regulatory framework provides a solid foundation for quality and provenance claims for Australian wine, and strong compliance by Australian companies enhances Australian wine's reputation for authenticity.

We assist companies accessing export markets by making information about a market's laws and regulations clear and readily accessible through our Export Market Guides. We also assist producers to comply with labelling and compositional requirements, and we monitor and report on their compliance, so that their customers can trust in the integrity of Australian wine.

We will continue to streamline our export approval process through our Wine Australia Licensing and Approval System (WALAS), and review our regulatory activities and regulatory fee structure to ensure any savings are passed on to exporters.

We will develop and deliver the Australian wine label intellectual property directory to prevent copycat exports. We will investigate new methods of wine traceability, including blockchain, to support our authenticity claims; ways to strengthen supply chain integrity to better verify vintage, variety and origin labelling; and ways to decrease the red tape associated with record keeping under the Label Integrity Program.

We will continue working with the Australian Government and AGW to enhance market access by identifying and managing technical trade barriers, and by investing in developing and providing the technical information to inform negotiations. We will build relationships with counterpart regulators to develop a comprehensive understanding of the regulatory requirements in import markets, assist exporters to resolve specific market access issues, and deliver at least one streamlined regulatory process through this cooperation. We will support the Australian Government's negotiations for improved market access with accurate, timely and appropriate technical information.

## Strategy 3:

# Enhance grape and wine excellence



To help Australian wine be enjoyed and respected globally and to build profitable, resilient and sustainable winegrape and wine businesses, we will continue building grape and wine excellence.

In five years' time, we will know we have been successful if the research outcomes that allow grapegrowers and wine producers to excel are available.

We will measure this success by:

- 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
- 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
- four new or enhanced technologies and processes to improve vineyard efficiency and sustainability being available to the sector
- the supply of genetically diverse and high-health planting material being maintained to the satisfaction of relevant stakeholders
- 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, and
- at least three Wine Australia-funded projects having progressed to commercialisation.

In viticulture, we will continue our long-term investment in research and development to identify and breed enhanced or new grapevine varieties, clones and rootstocks that suit our environment and consumer tastes. We will continue to build knowledge and encourage the adoption of objective measures of grape quality to improve pricing transparency and equity, and support continuous improvement by growers.

We will increase viticultural efficiency and grape quality by helping the sector to realise the benefits from agtech, robotics, machine learning and big data management. We will focus on delivering tangible outcomes, such as a universal spray diary, as well as outcomes not yet known. This will be through a phased strategy with demonstration sites of current technology through to co-developing new technology with start-ups and commercial companies.

In winemaking, there will be a continued focus on increasing winery efficiency by developing and applying new technologies, measurements and services to enhance efficiencies and product quality, as well as improving sustainability.

## Strategy 4:

# Grow sustainable environments



To help Australian wine be enjoyed and respected globally and to build profitable, resilient and sustainable winegrape and wine businesses, we will provide knowledge and tools to help growers and producers to be more environmentally sustainable.

In five years' time, we will know we have been successful if:

- new knowledge allows the sector to establish a carbon emissions benchmark
- new knowledge allows the sector to establish waste production benchmarks
- two (new) tools, technologies or processes are available to the sector to allow them to adapt to and/or mitigate the effects of climate change
- a better understanding of vine water use is contributing to better irrigation scheduling processes that allow more efficient and effective use of water
- research delivers clear information about the value of soil remediation processes and enhancing functional biodiversity
- new and improved practices for sustainable management of endemic pests and diseases are available to the sector
- 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.
- the use of vineyard cover crops and soil remediation practices has increased by 10 per cent
- the land area dedicated to enhancing functional biodiversity has increased by 10 per cent, and
- best-practice irrigation scheduling to optimise water use efficiency is adopted by an additional 30 per cent of growers in inland regions.

Climate change is already impacting grape and wine production, as evidenced by changes in grape phenology and harvest dates that have led to compressed harvests and greater pressure on vineyard and winery infrastructure. We must identify management strategies to deal with the challenges of short-term climate cycles and long-term climate change for winegrape growers and winemakers.

While further developing adaptation strategies is essential, we will also develop direct mitigation strategies to position grape and wine production in a climate-challenged world. We will continue to invest in RD&A to manage the effects of wildfire and smoke exposure, both in the vineyard and the winery, with a focus on developing early-warning systems and remediation strategies.

We will undertake the research and benchmarking required to establish carbon emissions targets for the sector as the first step towards achieving the grape and wine sector's goal of zero nett carbon emissions by 2050. We will also research and benchmark the sector's waste production as the first step towards achieving the *Vision 2050* goal of zero waste by 2050. In developing these targets, we will actively collaborate with other RDCs on a similar strategy for the entire agriculture sector, and we will seek to attract technology development companies to address grape and wine issues.

To help build the sector's sustainability, we will continue to invest in reducing chemical use and increasing water efficiency in the vineyard. We will identify and promote the use of new products and integrated pest management for the management of pests and disease. We will promote the advantages of enhancing functional biodiversity in the vineyard and its surrounds, and the importance of soil health.

Biosecurity ensures the sustainability and competitiveness of the wine sector through a reduced reliance on chemicals and reduced management costs. We need to prepare for greater and more frequent pressure from the spread of existing pests and diseases and the introduction of new biosecurity threats. We will seek to understand the emerging threats and their impact on the wine sector. We recognise the importance of prevention and preparedness for new and emerging threats as well as information for the management of threats. We will actively build on our current extension role that is responding to the *Xylella fastidiosa* threat.

To help the sector demonstrate its sustainability credentials, we will actively support the sector's Sustainable Winegrowing Australia program.



## Strategy 5:

# Build business sustainability, excellence and leadership



To help Australian wine be enjoyed and respected globally and to build profitable, resilient and sustainable winegrape and wine businesses, we will accelerate the adoption of research outcomes and best practice.

In five years' time, we will know we have been successful if:

- of levy payers who participate in Wine Australia-supported extension and adoption programs:
  - 80 per cent consider them as a good or very good use of levy funds
  - 80 per cent have gained new knowledge or new information to improve their long-term profitability and sustainability
  - 50 per cent intend to make or have made changes to existing practices by adopting the outcomes of R&D
  - 80 per cent of those who've adopted agtech have a positive return on their investment
- 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
- 99 per cent of exporters have access to the information and knowledge they need to meet the requirements of the importing country, and
- more than 90 per cent of market insights customers are satisfied or very satisfied with our market insights services.

Innovation and education are critical to the sector's ongoing success in the vineyard, the winery, in exports and in business. It is only by adopting the outcomes of research and applying new knowledge that sector participants can realise the benefits of research and development.

Accelerating the adoption of research outcomes will allow the sector to enhance its sustainability – environmentally, economically, culturally and socially – and demonstrate its responsible use of precious natural resources. This, in turn, will strengthen the sector's social licence to operate.

We already have available a range of new knowledge and technologies to improve grapegrowing, winemaking, exporting and running a wine business. There is also a range of new agtech innovations that could have direct application to the wine sector. We will focus on facilitating the adoption of this existing knowledge as well as investing in research to develop more knowledge.

We will facilitate accelerated adoption across the sector through modern extension and communication programs, including by establishing and maintaining a single source-of-truth knowledge base and agtech hub, and by developing adoption packages for priority innovations. We will enhance our Regional Program and support the delivery of workshops, seminars and short training programs. Our greater focus on the adoption of research results will mean that we invest in a leaner research portfolio.

We will encourage evidence-based and data-driven decision-making by collecting, analysing and disseminating global wine sector intelligence and accurate and timely supply-and-demand information.

We will deliver the National Online Wine Tourism Package, funded through the \$50m Package, and encourage regions and businesses to use this platform to engage customers. We will extend the enduring benefits of the \$50m Package and help improve business profitability by continuing to deliver the Growing Wine Tourism and Growing Wine Exports capacity-building programs, and by encouraging wine businesses to use Australian Wine Made Our Way collateral.

We will help develop the leaders of tomorrow – and build the skills of the leaders of today – through regional governance and leadership programs that support a diverse and vibrant wine sector. We will also work with the school, vocational and higher education sectors so that they can deliver courses that address the sector’s needs and promote pathways to the grape and wine sector as a career of choice. To achieve the sector’s ambitious goals, there is a particular need for highly trained and skilled viticulturists.

We will invest in the sector’s research capability by supporting postgraduate students early in their careers, and we will encourage stronger engagement and collaboration between the students and the sector so that their research is grounded 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.



# Contributing to *Vision 2050*

Wine Australia exists to help the Australian grape and wine sector meet the long-term goals set out in *Vision 2050*. As detailed in Table 2 below, we have worked with AGW to determine five-year measures to show progress towards the 2050 targets, and then detailed how Wine Australia's activities are contributing towards that progress.

**Table 2: Vision 2050 targets, five-year progress targets and how Wine Australia will help the sector achieve its targets**

Current status	Vision 2050 target	Wine sector's projected 2025 target	How Wine Australia will support these targets
<p>Total winemaking revenue \$6.4 billion</p> <ul style="list-style-type: none"> <li>Domestic market is \$3.5 billion and 496 million litres (2018–19)</li> <li>Export market is \$2.87 billion and 728 million litres<sup>3</sup></li> </ul>	<p>Total winemaking revenue \$15 billion</p> <ul style="list-style-type: none"> <li>Domestic market is \$5 billion</li> <li>Export market is \$10 billion<sup>4</sup></li> </ul>	<p>Total winemaking revenue \$7.2 billion</p> <ul style="list-style-type: none"> <li>Domestic market is \$3.7 billion</li> <li>Export market is \$3.4 billion<sup>5</sup></li> </ul>	<p>Marketing support to position for increased high-value sales</p> <p>RD&amp;A investments allow producers to make higher-value products and manage costs (i.e. become more profitable)</p>
<p>Total economic contribution of the Australian wine sector to the economy: \$45.5 billion<sup>6</sup></p>	<p>Total economic contribution of the Australian wine sector to the economy: \$100 billion</p>	<p>Total economic contribution of the Australian wine sector to the economy: \$51 billion</p>	<p>Facilitating exports</p> <p>Delivering the Growing Wine Tourism and Growing Wine Exports capacity-building programs</p> <p>Administering cellar door grants</p>
<p>Current rankings, by value, for Australian still wine sales:<sup>7</sup></p> <ul style="list-style-type: none"> <li>China – 3rd</li> <li>United States – 4th</li> <li>United Kingdom – 3rd</li> <li>Canada – 5th</li> <li>Hong Kong – 2nd</li> </ul>	<p>No. 1 valued product in each key market in which we operate</p>	<p>By 2025, the sector will need to have increased the average value of exports from \$3.95/litre (March moving annual total (MAT) 2020) to \$4.92/litre (June MAT 2025) to be on track to achieve its 2050 target.</p>	<p>Provide the regulatory framework that allows expeditious approval of exports</p> <p>Provide marketing support to position wine producers for increased high-value sales</p> <p>RD&amp;A investments allow producers to make higher-value products</p> <p>To reach the target rankings in these five markets will require a concerted effort to raise the quality levels of all wine produced and a significant increase in brands' investment in marketing.</p>

3. Wine Australia Export Report, March 2020

4. Assumes a domestic market compound annual growth rate (CAGR) of 1% and export of 4.5%

5. Assumes a domestic market CAGR of 1% and export of 4.5%

6. AgEconPlus 2019. Economic Contribution of the Australian Wine Sector 2019

7. IWSR Australian still wine sales 2018. These are an estimate of retail sales in each market.

**Table 2 (cont.): Vision 2050 targets, five-year progress targets and how Wine Australia will help the sector achieve its targets**

Current status	Vision 2050 target	Wine sector's projected 2025 target	How Wine Australia will support these targets
<p>Average consumer perception of Australian wine by key markets:</p> <ul style="list-style-type: none"> <li>• United States – 7.98/10</li> <li>• United Kingdom – 8.14/10</li> <li>• China – 8.56/10</li> <li>• Canada – 8.19/10</li> <li>• Hong Kong – 7.06/10</li> <li>• Japan – 7.33/10</li> <li>• Singapore – 7.47/10</li> <li>• South Korea – 6.95/10<sup>8</sup></li> </ul>	<p>Increased consumer perception of Australian wine across key markets, based on the consumer sentiment index</p>	<p>The perception of Australian wine increases by 5 per cent in each of our four largest markets:</p> <ul style="list-style-type: none"> <li>• United States – 8.38/10</li> <li>• United Kingdom – 8.55/10</li> <li>• China – 8.99/10</li> <li>• Canada – 8.60/10</li> </ul>	<p>Marketing activities support improving customer perceptions</p>
Unknown	<p>Australian wine education and research institutions are collectively ranked number one in the world</p> <p>Recognition as the world's most innovative wine sector, with a strong research and education focus</p>	Target to be established	<p>Wine Australia's R&amp;D funds are invested for impact and to deliver optimal cost-benefit outcomes for funders<sup>9</sup></p> <p>RD&amp;A investments support innovative developments</p>
Unknown	Zero waste and nett zero emissions status	Target to be established	<p>Establish benchmarks for waste production and carbon emissions by 2022</p> <p>Invest in R&amp;D to support zero waste and nett zero emissions status goals</p>

8. Wine Intelligence, 2019

9. Measured through bibliometric analysis and cost-benefit analysis



# Monitoring and evaluation

We are committed to providing quantifiable returns on grape and wine sector and Australian Government investments across our portfolio of activities.

In our *Performance Evaluation Framework 2020*, we provide detailed information on how we monitor, evaluate and report return on investment.

We set clear measures of success in our Strategic Plan and our Annual Operational Plans, we measure our effectiveness in achieving these measures, and we report the outcomes in our Annual Reports and Performance Evaluation Reports.

To measure our effectiveness, we:

- evaluate our performance against our Strategic Plan and our Annual Operational Plans
- evaluate investment proposals against clear and public criteria
- actively manage and review current projects and activities, and
- evaluate completed activities and programs of investment.

We undertake cost-benefit analyses of selected completed activities and programs. These analyses measure the results of projects and their impact on our levy payers.

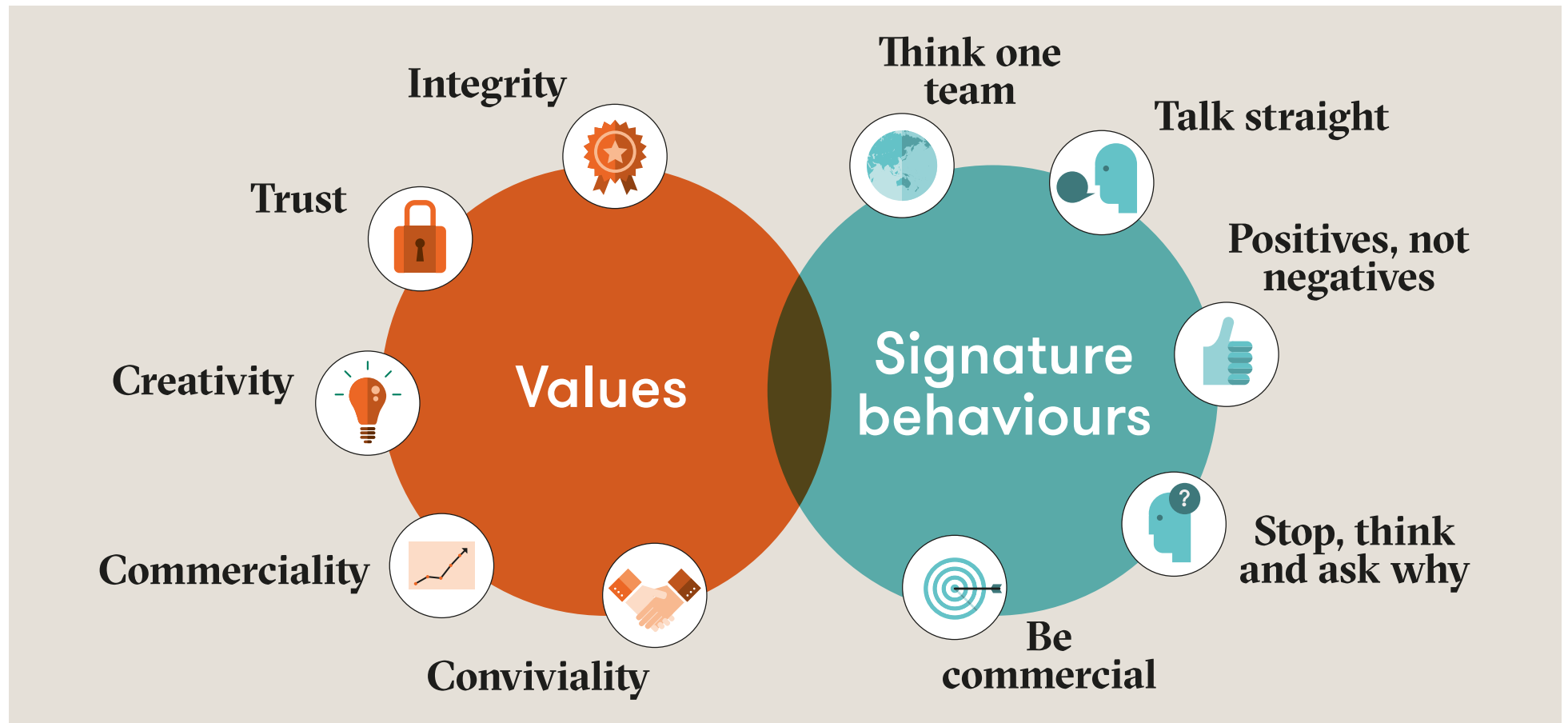
We are committed to continuous improvement and we will refine our processes and activities based on the outcomes of these evaluations. Since our *Strategic Plan 2015–20* was developed, we have adopted recommendations from independent external and internal reviews to improve how we work, how we manage risk and how we communicate with our stakeholders.



# How we operate

Our values inform how we work and how we treat each other and the people with whom we work. We use our five signature behaviours to create the workplace we want and to deliver value for our stakeholders.

Figure 3: Wine Australia's five values and five signature behaviours





We communicate clearly and effectively with our external stakeholders so that they understand how to access the information and services that we provide. Through the levy payer register, we now have the details of growers who pay the grape research levy, which will allow us to communicate with them directly. To better understand how growers, producers and exporters perceive our information and services and how we can improve our engagement, we will continue our annual stakeholder surveys.

We will know that our stakeholder engagement is successful if we improve our net promoter score from the benchmark of +12 in 2019. Our focus is delivering value for our stakeholders to help them do better business.

We take our governance and financial responsibilities seriously, and adherence to the letter and spirit of the Act and the *Public Governance, Performance and Accountability Act 2013* (PGPA Act) underpins how we manage our responsibilities.

We will continue working with the Department of Agriculture, Water and the Environment to improve the efficiency and reduce the costs of levy collection so that levy payers can maximise the return on their investment.

We will encourage our staff to embrace our values and signature behaviours, and to focus on how they deliver value to our funders. We will support our workforce with safe and productive workplaces and skill enhancement opportunities.

We measure our staff engagement levels annually and we will know that we have created the workplace we want if our staff engagement levels improve from the benchmark of 70 per cent in 2019.

# A balanced portfolio

## reflecting our stakeholders' priorities

Our Strategic Plan is informed by the extensive stakeholder consultation undertaken in conjunction with AGW, by the grape and wine sector's 30-year plan *Vision 2050*, and by the Australian Government's Science and Research Priorities and Rural Research, Development and Extension Priorities.

As we outlined in our Consultation Plan, over 12 months we sought to engage with the whole Australian grape and wine community so that everyone had the opportunity to contribute. Special efforts were made to ensure that the views of small, medium and large grapegrowers, winemakers and exporters around the country were heard, and there was an impressive level of engagement by stakeholders.

We developed a discussion paper to draw together our thinking about where the sector was in 2019 and the future challenges and strategic imperatives facing it.

To identify key research, marketing and regulatory priorities:

- face-to-face meetings were held with the AGW Board and Executive, and a number of the top 20 wine producers
- telephone meetings were held with the Department of Agriculture, Water and the Environment and a number of the top 20 wine producers
- eight facilitated workshops were conducted in Western Australia, South Australia, New South Wales, Victoria and Tasmania with grapegrowers, winemakers, RD&A providers and state and regional association representatives. These workshops were conducted in concert with AGW (the scheduled workshop in Queensland was cancelled at the request of the Queensland Wine Industry Association because of regional priorities), and
- we publicly invited written submissions from any interested party.

With AGW, we established a Joint Strategy Committee that provided advice to AGW and Wine Australia on the development of *Vision 2050* and this Strategic Plan. Committee members then reported back to the boards of their respective nominating organisations.

Our investments are aligned with the strategic research priorities of the Australian Government and the Australian grape and wine community. While we receive funding from two separate levies, we do not differentiate between viticultural and winemaking research as the distinction is artificial – viticultural research often has a winemaking outcome and winemaking research often requires viticultural input. Instead, our RD&A investments aim to increase the sector's long-term profitability and sustainability, which benefits all levy payers and the wider community.

Our investments range from short-term projects that will be completed in under two years, to medium-term ones (two to four years), to long-term projects (over four years). We also invest in different risk categories: low-risk applied R&D, and medium- and high-risk blue-sky research, where success is less assured but, if it were successful, the outcome would be very valuable to the sector.

We assess the likelihood of success and the extension and adoption potential of all RD&A project applications as part of the overall ranking of proposals. We focus on extracting the full value of our investments in RD&A for the benefit of our levy payers, the Australian Government and the wider community.



# Alignment with Australian Government priorities

**Table 3:** Alignment of Wine Australia's strategies with the Australian Government's strategic research priorities

Wine Australia strategies	Science & Research Priorities	Rural Research, Development and Extension Priorities
Strategy 2: Protect the reputation of Australian wine	Food [1.3] Advanced manufacturing [7.2]	Advanced technology Adoption of research and development
Strategy 3: Enhance grape and wine excellence	Food [1.3] Advanced manufacturing [7.2]	Advanced technology
Strategy 4: Grow sustainable environments	Food [1.3] Soil and water [2.2, 2.3] Environmental change [8.1, 8.3]	Advanced technology Biosecurity Soil, water and managing natural resources
Strategy 5: Build business sustainability, excellence and leadership	Food [1.1, 1.3] Soil and water [2.2, 2.3] Advanced manufacturing [7.1, 7.2] Environmental change [8.1, 8.3]	Advanced technology Biosecurity Soil, water and managing natural resources Adoption of research and development

The Science and Research Priorities are:

- food
- soil and water
- transport
- cybersecurity
- energy
- resources
- advanced manufacturing
- environmental change
- health.

The Rural Research, Development and Extension Priorities are:

- advanced technology, to enhance innovation of products, processes and practices across the food and fibre supply chains through technologies such as robotics, digitisation, big data, genetics and precision agriculture
- biosecurity, to improve understanding and evidence of pest and disease pathways to help direct biosecurity resources to their best uses, minimising biosecurity threats and improving market access for primary producers
- soil, water and managing natural resources, to manage soil health, improve water use efficiency and certainty of supply, sustainably develop new production areas and improve resilience to climate events and impacts, and
- adoption of R&D, focusing on flexible delivery of extension services that meet primary producers' needs, and recognising the growing role of private service delivery.

# Income and expenditure forecast

## Projected income

Figure 4 shows our projected income for 2020–21. Levy revenue income is projected based on estimates of vintage size and the FOB value of wine exports. Commonwealth matching income is estimated based on eligible RD&A expenditure. Remaining income sources are projected based on estimated activity levels.

Under the Act, the grape research levy and the R&D component of the wine grapes levy is hypothecated to RD&A, which imposes constraints on our flexibility in allocating resources.

It is important to note that our purchasing power will contract year-on-year over the term of this Strategic Plan because the levies that we receive are not indexed to the consumer price index.

Figure 4: Projected income by source, 2020–21

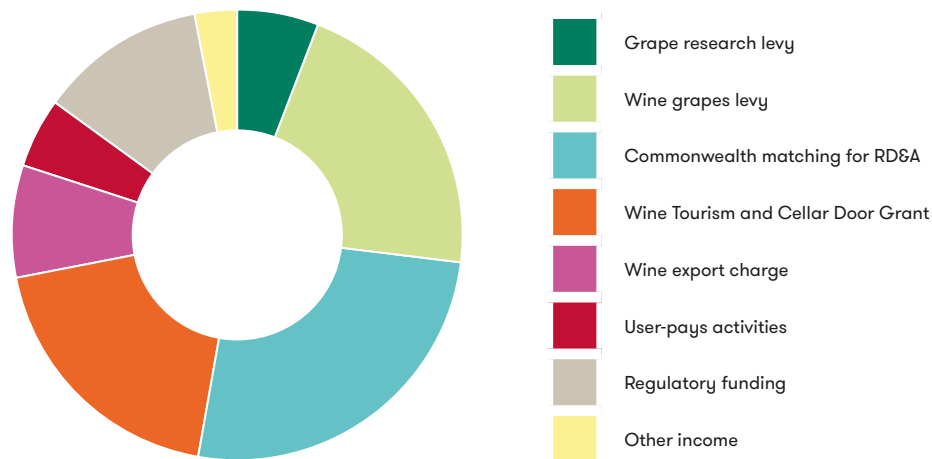


Figure 5: Projected income, 2020–21 to 2024–25

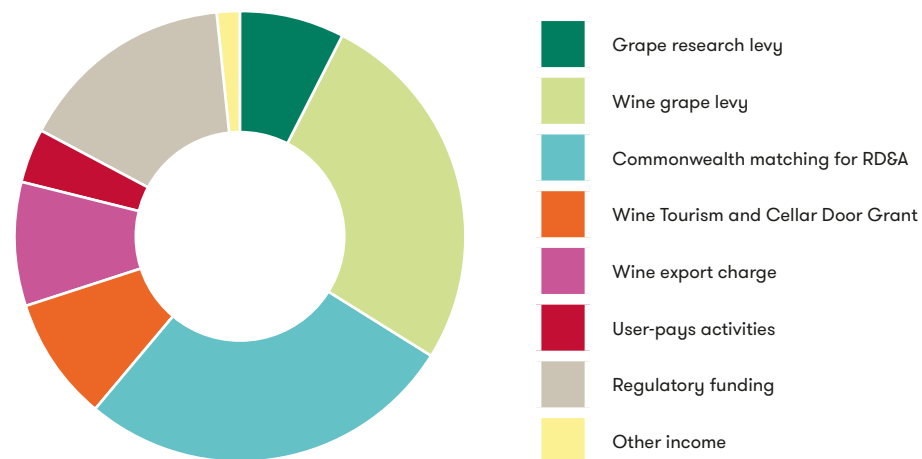


Table 4: Projected income, 2020–21 to 2024–25 (assuming 2% growth per annum in wine export charge)

	2020–21 (\$m)	2021–22 (\$m)	2022–23 (\$m)	2023–24 (\$m)	2024–25 (\$m)	Total (\$m)
Grape research levy <sup>1</sup>	3.1	3.5	3.5	3.5	3.5	17.1
Wine grape levy <sup>2</sup>	10.9	12.3	12.3	12.3	12.3	60.1
Commonwealth matching	14.1	13.7	11.6	11.6	11.6	62.6
Wine Tourism and Cellar Door Grant <sup>3</sup>	10.0	10.0	0.0	0.0	0.0	20.0
Wine export charge	3.8	3.9	4.0	4.1	4.1	19.9
User-pays activities	2.3	1.7	1.6	1.7	1.6	8.9
Regulatory funding	6.2	6.7	7.1	7.5	8.0	35.5
Other income	1.7	1.6	0.4	0.3	0.4	4.4
<b>Total</b>	<b>52.1</b>	<b>53.4</b>	<b>40.5</b>	<b>41.0</b>	<b>41.5</b>	<b>228.5</b>

1. Based on long-term average

2. Based on long-term average

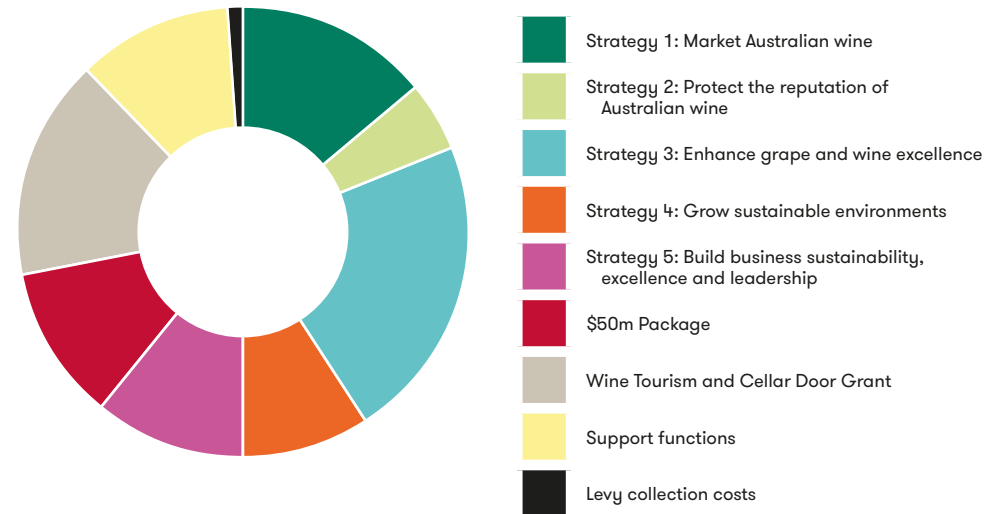
3. Current agreement with Commonwealth concludes on 30 June 2022

## Funding allocation – investment by strategy

**Table 5:** Wine Australia's investments in the first year of our Strategic Plan 2020–25

Investment area	\$m	Percentage allocation
Strategy 1: Market Australian wine	9.4	14%
Strategy 2: Protect the reputation of Australian wine	3.2	5%
Strategy 3: Enhance grape and wine excellence	14.3	22%
Strategy 4: Grow sustainable environments	6.0	9%
Strategy 5: Build business sustainability, excellence and leadership	7.0	11%
\$50m Package	7.5	11%
Wine Tourism and Cellar Door Grant	10.2	16%
Supporting functions	6.9	11%
Levy collection costs	0.9	1%
<b>Total</b>	<b>65.4</b>	<b>100%</b>

**Figure 6:** Projected expenditure by strategy, 2020–21



## Forecast operating result

Wine Australia has accumulated reserves in excess of minimum reserve levels and we are drawing down on these reserves to fund ongoing strategic priorities under this Strategic Plan. Of the \$14.2 million we hold in levy reserves, \$8.4 million is hypothecated to RD&A.

We aim to maximise the returns on our funders' investment and the services offered to them.



# 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 to meeting our corporate goals.

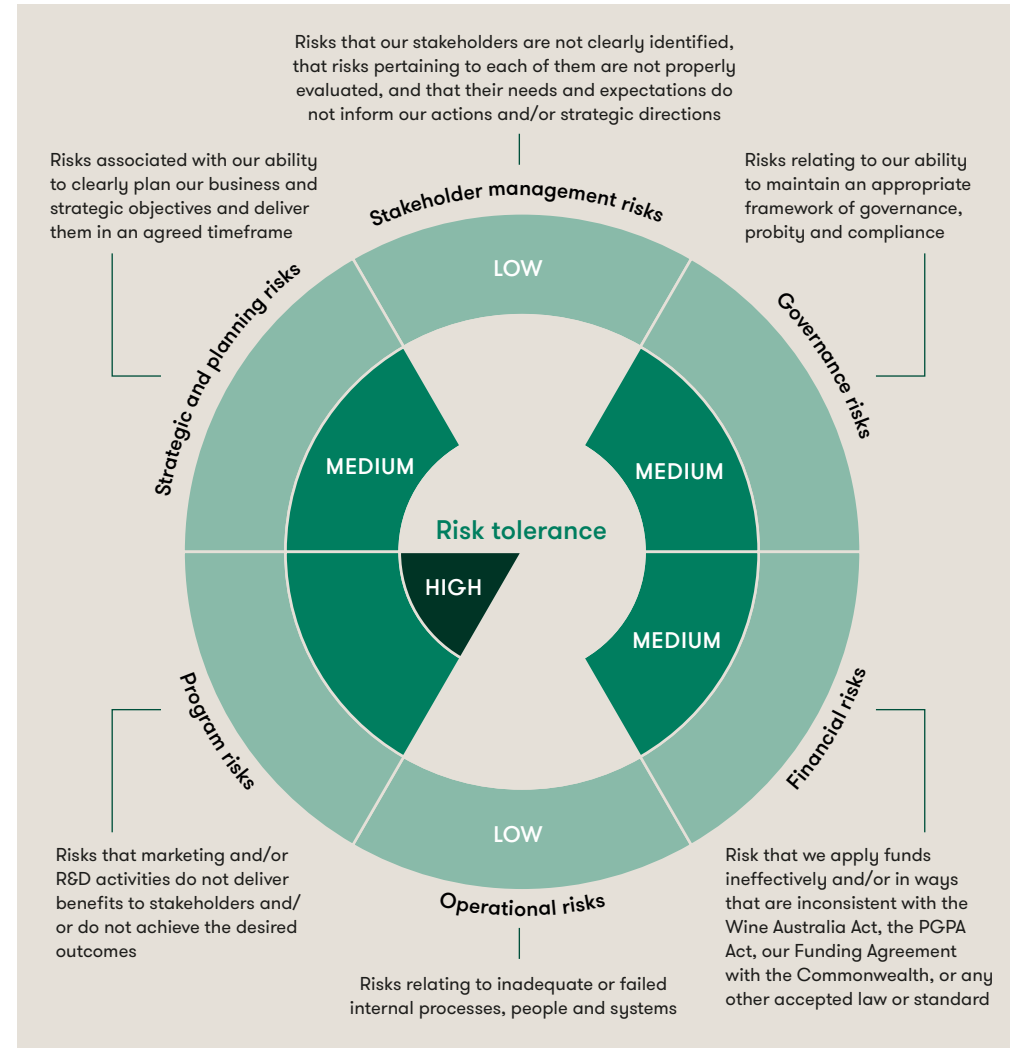
We have set risk tolerances across six risk categories to guide the ways in which we engage with risk.

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 Committee. The Audit Committee reports on risks to the Board at least six-monthly, or at the next scheduled Board meeting if new high-rated risks are identified.

Figure 7: Wine Australia's risk tolerances



# Glossary

\$50m Package	Export and Regional Wine Support Package
agtech	agricultural technology
AGW	Australian Grape & Wine Incorporated
AWRI	Australian Wine Research Institute
CAGR	compound annual growth rate
COVID-19	coronavirus disease
CSIRO	Commonwealth Scientific and Industrial Research Organisation
FOB	free on board
IWSR	International Wines and Spirits Record
KPIs	key performance indicators
MAT	moving annual total
NWGIC	National Wine and Grape Industry Centre
PGPA Act	<i>Public Governance, Performance and Accountability Act 2013</i>
RDCs	Research and Development Corporations
RD&A	research, development and adoption
R&D	research and development
the Act	<i>Wine Australia Act 2013</i>
UK	United Kingdom
US	United States
USA	United States of America
WALAS	Wine Australia Licensing and Approval System







**Australian Government**

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**Wine Australia**

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