THOUGHT LEADERSHIP

Volume 5

Wine Australia

FUTURE LEADERS 2025

B.NXT

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The *Future Leaders* program provides a rigorous, future-focused framework to equip emerging leaders in the grape and wine sector with the strategic insight, critical thinking and collaborative capability needed to shape the sector's future.

Participants sharpen decision-making skills, build influential networks and form a nucleus of knowledge and confidence that radiates throughout the entire value chain.

This is not a passive development experience. The program actively cultivates agile, resilient leadership behaviours and champions diversity of thought. We expect our Future Leaders to be authentic, bold, and unafraid to challenge the status quo. We demand vision. We encourage innovation. And we support those willing to lead from the front.

The thought leadership essays published in *Thought Leadership Volume 5* are a direct outcome of that ethos. Each piece is an original contribution from a 2025 Future Leader - evidence of the depth of thinking and breadth of ambition emerging from this exceptional cohort.

Their work explores some of the most pressing and complex themes facing the sector today.

Market and trade headwinds in a more competitive global marketplace along with changing consumer behaviours and preferences sees many essays focused on customers, category relevance and marketing.

You will see themes exploring the importance of people within the sector, fostering safety, diversity, community and inclusivity. And underpinning all of this is the critically important area of sustainability, growing grapes and producing wine responsibly and ethically.

The opinions expressed are those of the authors alone. They are not policy statements - they are provocations, intended to drive dialogue, stretch thinking and inspire action across the sector.

With the graduation of the 2025 cohort, well over 150 leaders have now passed through the *Future Leaders* program since its inception in 2006. Many are already reshaping the sector's direction - from vineyard to boardroom. We look forward, with confidence and anticipation, to the continued impact of our 2025 alumni as they carry forward the spirit of courageous and collaborative leadership.

Our sincere thanks to the 15 alumni who served as coaches to the 2025 participants, generously offering their insights and experience to support the next wave of leadership: Amy Blackburn, Andrew Shedden, Armando Corsi, Beck Richardson, Caitlin Davies, Emily Hay, Jamie Pike, Kate Goodman, Katie Spain, Kendall Clements-Virag, Lucy Etheridge, Nick James-Martin, Steven Paul, Trish Barry and Wes Pearson.

We also acknowledge the exceptional contribution of Ali and Darren Hill, the *Pragmatic Thinking* team and all guest speakers, whose energy and expertise continue to elevate the standard of leadership across the Australian grape and wine community.

Martin Cole
Chief Executive Officer
Wine Australia

Lee McLean
Chief Executive Officer
Australian Grape and Wine

Since its inception in 2006 the Future Leaders program has been funded and coordinated by Wine Australia, with the endorsement of Australian Grape and Wine. Thought Leadership volumes are available via the Wine Australia website: https://www.wineaustralia.com/research and innovation/in-practice/people-development/future-leaders.

The views expressed in the essays in this publication are solely those of the authors. They do not reflect the policies, positions, or practices of the organisations supporting the Future Leaders program. These essays are intended to provoke thought and stimulate discussion, not to represent institutional perspectives.

Some essays in this publication may explore challenging themes or perspectives that could be confronting or uncomfortable for some readers.

Unless otherwise indicated many of the images used throughout this book are credited to Wine Australia.

Uncertainty and upheaval continue to shape the landscape of the Australian wine sector. The forces at play, from environmental pressures to shifting markets and changing consumer expectations, are complex and ever-moving. While no one can predict exactly what lies ahead, we can tip the scales in our favour through connected communities, collaborative approaches and daring innovation. The 2025 Future Leaders cohort has embodied all three.

When a group of talented, passionate and curious people come together with a shared commitment to lead differently, to grow, to stretch and to shape the future of this remarkable industry, something powerful happens. Over five months of deep learning, reflection and connection, this cohort forged not only their own leadership capabilities but also a strong sense of collective purpose.

Like an exceptional vintage, the pages that follow are the result of intention, patience and care. Within them are stories of courage, creativity and conviction. There have been challenges met, assumptions questioned and bold ideas explored, all driven by a desire to see the sector not only survive but thrive.

What you're holding is more than a collection of reflections. It is a snapshot of the future, a glimpse into what's possible when emerging leaders find their voice, back themselves and unite around a shared belief in better. Each contribution offers a perspective on how we can strengthen the ties between land, people and possibility.

Two common threads weave throughout these pieces: connection and change. Connection to people, place and purpose. Unsurprising from one of the most connected groups we've seen. And yet, these ideas carry an intention to challenge the status quo, but it is borne of caring deeply not just agitation for the sake of it.

At *Pragmatic Thinking*, it has been both a privilege and a pleasure to walk alongside this extraordinary cohort. The coaches, previous FL Alumni and many champions of the *Future Leaders* program, from Wine Australia and Australian Grape & Wine, have played an essential role in supporting this journey.

The future of the wine sector will not be written by circumstance alone. It will be shaped by those who dare to collaborate, to connect and to create change. If this group is any indication, the Australian wine industry's future is in ambitious, brave and deeply caring hands.

Alison Hill
Psychologist
Co-Founder of Pragmatic Thinking

Darren Hill
Behavioural Scientist
Co-Founder of Pragmatic Thinking

WINE FUTURE LEADERS 2025

Brendan **Hawker**

Brendan Hawker is the chief winemaker at Yering Station in Victoria's Yarra Valley, bringing extensive experience and a genuine passion for winemaking.

Originally from Australia's Adelaide Hills, Brendan's early interest in fermentation eventually led him away from a prospective medical career towards the world of wine. After completing his Winemaking degree at Adelaide University, he gained diverse experience through vintages across Australia, New Zealand and the United States.

In 2008, Brendan joined Yering Station, where he quickly demonstrated his talent and dedication. He was appointed chief winemaker in 2020, maintaining the winery's tradition of excellence while embracing innovation. Despite a brief international travel hiatus, Brendan's strong connections to Melbourne and the Yarra Valley keep him rooted at Yering Station.

His focus is on crafting wines that authentically express the region's terroir, emphasising elegance, purity of fruit and the true character of the vineyard.

Callie **Jemmeson**

Callie Jemmeson is a winemaker and brand ambassador at Joval Family Wines, responsible for the PachaMama and Cloak & Dagger brands. Her work focuses on premium small-batch production, brand development and sustainable practices.

In 2013, Callie founded Wine Unplugged, developing multiple brands including PachaMama and Cloak & Dagger, and growing production to 15,000 cases. Both labels were acquired by Joval Family Wines in 2024.

Over her career, Callie has completed more than 13 vintages across Australia, Italy, France and the United States, gaining experience at De Bortoli, Littorai, Fattoria Zerbina and Maison Lavau.

She holds a Bachelor of Arts from the University of Melbourne and studied Wine Science at Charles Sturt University. In 2018, she completed the Advanced Wine Assessment Course through the Australian Wine Research Institute.

Callie's work has been recognised with a 5-star Halliday rating, multiple trophies and medals, and finalist nominations for both the Young Gun of Wine and Australian Women in Wine Awards. She has also served as an associate judge at the Yarra Valley and Victorian wine shows.

Nick **Baverstock**

Nick Baverstock is the Senior Vineyard Manager for Treasury Wine Estates in Coonawarra, South Australia, where he oversees 800 hectares of premium vineyards. These vineyards supply high-quality grapes for some of Australia's most iconic wine brands, including Penfolds and Wynns.

With over 25 years of experience in the viticulture industry, Nick has managed vineyards across several renowned regions including McLaren Vale, Robe, and now Coonawarra. Before stepping into vineyard management, he worked as a Grower Liaison for Rosemount in McLaren Vale, gaining valuable insight into grape production and grower relations.

Nick has actively contributed to the advancement of viticulture in South Australia through his involvement in regional technical committees in both McLaren Vale and the Limestone Coast. His efforts in organising and facilitating workshops have helped local grape growers enhance their knowledge and practices.

Originally from South Africa, Nick moved to Australia at the age of 12. He now resides in Coonawarra with his wife, Peta, a sparkling winemaker, and their two sons, Luc and Zavier. Outside of viticulture, Nick is passionate about travel, cultural exploration, and conservation. He has volunteered with various organisations, including serving as a tour guide at Monarto Zoo - an open-range zoo in South Australia.

Nicola **Reid**

After graduating from the University of Bristol with a BA in Politics and Spanish, Nicola began her career as a Sommelier in the UK while gaining her Yachtmaster qualifications. She went on to work aboard luxury sailing yachts, travelling across the Atlantic and Pacific to destinations including French Polynesia, the Galapagos, the Norwegian Fjords and the Hebrides. Returning to land, she completed four vintages as a Cellar Hand in England and Australia before settling permanently in Australia.

Her deep connection to Spain led to six years with The Spanish Acquisition, a leading importer and distributor of Iberian wines. A WSET Diploma graduate, awarded the John Avery Vintners' Bursary by the Vintners' Company, Nicola now teaches WSET Levels 2, 3 and Diploma in Wine in Melbourne. She has also served as Executive Officer at Sommeliers Australia, has experience judging at domestic wine shows, as well as Australia and China Wine List of the Year Awards.

Nicola lives on the coast, where she enjoys surfing and spending time with her family.

Emma **Brown**

Head of Innovation and Insights, Brown Family Wine Group.

Growing up in Milawa, Victoria, Emma has worked in her family business, Brown Family Wine Group, from a young age in a variety of holiday jobs, including the cellar door and vineyard.

Emma completed a Bachelor of Communications (Business) at Bond University, which lead her to work in various marketing roles in FMCG within Australia and the USA.

Emma returned to Northeast Victoria in 2018, joining the family business as Group Marketing Manager, then into the role of Head of Innovation and Insights. Emma serves as a member on the Family Council and various wine industry bodies. Emma is extremely passionate about being a custodian for the wine industry and the family business, championing relevance and recruitment around the next generation participating in and enjoying wine.

Lachlan **Aird**

Lachlan Aird is the DTC and E-Commerce Manager for Shaw + Smith, Tolpuddle Vineyard, The Other Wine Co. and MMAD Vineyard, overseeing all aspects of direct-to-consumer engagement, including websites, wine clubs, and customer experience. With a background in journalism and fashion marketing, Lachlan entered the wine industry a decade ago, bringing a fresh perspective that fuses creativity and data-driven strategy.

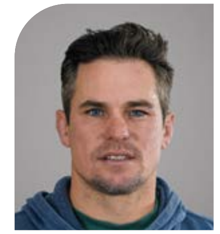
He has worked with wineries throughout McLaren Vale, Barossa Valley, Langhorne Creek, Tasmania and the Adelaide Hills on brand development, website design, technology integrations, cellar door experiences, events, social media and content creation.

Lachlan holds WSET Level 3, serves on the Global Wine Advisory Committee for Commerce7, and was the 2020 Wine Communicators of Australia Wine Media Cadet. He also holds Bachelor's degrees in Media and International Studies and a Diploma of Japanese Language from the University of Adelaide.

Tash **Stoodley**

Founder and Director of Savvy Comms, Tash is one of the wine industry's leading voices in strategic digital marketing. With a career spanning nearly two decades, she's built a reputation for helping wine brands move beyond busywork and towards marketing that actually works. Through Savvy, Tash partners with some of Australia's most respected producers to grow direct-to-consumer sales and brand loyalty through strategy-led digital ecosystems.

A regular contributor to WBM – Australia's Wine Business Magazine, Tash is known for translating complex marketing concepts into practical, actionable insights that wineries can apply, and is a vocal advocate for building marketing capability across the sector. Studying Mandarin and Spanish to better connect with global wine communities, Tash continues to champion a more strategic, future-focused approach to marketing and leadership in the Australian wine industry.

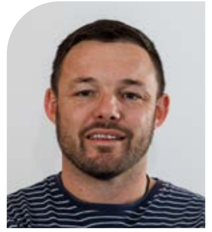


Daniel **Mortimer**

Daniel's love for viticulture began at six years old when he and his four brothers helped plant his family's vineyard in 1995. Fast forward 30 years and Daniel is now General Manager and co-owner of Mortimers Wines in Orange, New South Wales.

Having grown up on the winery, Daniel left Orange after school to pursue a professional Rugby League career, spanning 10 years and 150+ games in the NRL including a grand final with the Parramatta Eels in 2009 and a Premiership with the Sydney Roosters in 2013. Upon retiring in 2018, he returned to Orange and turned his focus and passion back into the family business. Daniel is an active part of the Orange Wine Region and sits on the Region's Vigneron Association.

Daniel loves wearing all the hats associated with running a small business, but his favourite days are spent pouring wine for guests at their cellar door, a heritage listed 150-year-old, former Public Schoolhouse.



Matt
Duggan

Matt Duggan is Viticulturist at Domaine Chandon Australia, part of the Moët Hennessy group, where he oversees vineyards across the Yarra Valley, Strathbogie Ranges and Whitlands Plateau.

A New Zealander by birth and now proudly based in Victoria, Matt has built a reputation for technical excellence, curiosity, and calm, people-centred leadership. With over 15 years' experience spanning both sides of the Tasman, he thrives on finding smarter and more sustainable ways to grow grapes, build teams and deliver quality at scale.

A three-time Marlborough Young Viticulturist of the Year, Matt believes progress comes from curiosity and continuous improvement – never standing still. He's passionate about helping shape the next generation of viticultural leaders and ensuring Australia's wine industry remains bold, collaborative and forward-looking.

Away from work, Matt enjoys exploring regional Victoria with his family, embracing the Aussie camping life, and slowly getting his head around the nuances of Victorian 'footy' – but will always be a rugby kid at heart.

Marianne
Duluk

Marianne Duluk brings close to two decades of dedicated experience in the wine sector, distinguished by her expertise in global marketing, brand building and export growth. She has a proven record of driving category expansion across key international markets, including the Asia-Pacific, North America and Europe, and has successfully managed portfolios spanning boutique wineries to leading brands across South Australia, Victoria and Spain.

In her current role with the South Australian Department of State Development, Marianne leads the State's $3.9 million Global Wine Growth Program, advancing the success of South Australian exporters through strategic international trade initiatives. She also established the South Australian Wine Ambassadors Club - a flagship network of global advocates promoting the state's wines across the Indo-Pacific.

With a deep understanding of government operations and governance frameworks, Marianne fosters strong collaboration between public and private sectors to deliver sustainable industry outcomes. She holds a Bachelor of Wine Marketing and a Graduate Certificate in Food Writing from the University of Adelaide and has served with the South Australian and Victorian chapters of Wine Communicators of Australia.

A published wine and food writer, Marianne is passionate about consumer behaviour and connecting audiences to authentic wine culture.

Chris
Mein

Chris has spent two decades working in the Adelaide Hills. Since completing his Bachelor of Viticulture in 2008, Chris has worked with some of the region's leading producers and is currently the Vineyard Manager at Longview Vineyard.

Chris has honed his management and viticultural skills through the completion of the Professional Management program through the Adelaide University Executive Education and attended the AWRI Advanced Viticulture course. He contributes to regional sustainability and quality initiatives as a member of the Adelaide Hills Grape and Environment Committee.

Chris is passionate about producing premium quality fruit through innovative, regenerative practices that balance environmental responsibility with economic sustainability. His approach has helped produce multiple trophy-winning wines including the 2022 Francois De Castella trophy for the Macclesfield Gruner Vetliner. The first major trophy won by a Gruner in Australia.

When not in the vineyard, Chris is either on his bike riding and racing through the hills or relaxing at home with his family enjoying a glass of wine.

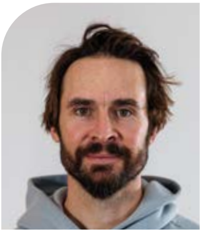
Andi
Roberts-Davison

Dr Andrea (Andi) Roberts-Davison is a winemaker, viticulture and oenology lecturer at Melbourne Polytechnic, and a passionate advocate for bridging education, research and industry.

With a PhD in Biochemistry from the University of Southampton, Andi brings scientific rigour to practical viticulture, leading research into bacterial inflorescence rot in Australian vineyards.

A former Chemistry teacher and now a finalist for the 2025 Wine Communicators of Australia *Education Provider of the Year*, she is deeply committed to developing the next generation of grape and wine professionals. Through her small Yarra Valley wine label,Pip & Ra Wines, Andi experiences first-hand the challenges and opportunities of sustainable production.

Her leadership philosophy is grounded in curiosity, collaboration and community, empowering others to think critically, act courageously and connect science with the art of winemaking.



Nick
Dugmore

Nick Dugmore completed his Bachelor of Wine Marketing at the University of Adelaide in 2006. Deciding he had better learn to walk the walk, many vintages in various wineries and countries followed. Eventually he decided he preferred the hands-on side of the industry and went back to university to study chemistry and Oenology. Nick worked as Winemaker at Zilzie in the Murray Darling, Assistant winemaker at The Lane Vineyard in the Adelaide Hills, and was Assistant winemaker at Wirra Wirra when COVID set him free.

Nick started the brand STOKE in 2016, making Kangaroo Island wines. He took over a five-hectare vineyard near Stokes Bay in 2020 and has set up a winery located in Mount Jagged on the mainland. He was very passionate about regional development until some recent health issues helped him realise that regions are simply a human concept, and now soil health has become his primary focus.

Time away from work is spent with his family, on the tennis court or in the surf, and he is also an avid rock climber.

Ashleigh
Seymour

Ashleigh Seymour draws on almost two decades of experience in the Australian wine industry, leading sustainable change and championing innovation for a resilient future. Her career has spanned winemaking, technical management and brand development, always guided by a passion for environmental stewardship and advancing sustainable practices across the sector.

Ashleigh believes in the power of collaboration and authentic leadership to address industry challenges, foster meaningful connections and inspire the next generation of wine professionals. Her commitment to continuous learning and sector-wide progress is matched by her drive to create positive impact for producers, communities and the land they care for.

She is an active member of the AGW Small Winemakers Committee and the McLaren Vale Districts Committee, has founded her own wine brand, Vino Selvatico, and serves as a wine show judge - advocating for innovation, integrity and connection within the industry.

Madeleine
Marson

Madeleine Marson is an emerging winemaker, bringing a strong pedigree in research and a holistic approach to winemaking and viticulture at Vinea Marson. Instrumental in establishing the family's award-winning Cellar Door, Madeleine turned her attention to the winery in 2017, completing a vintage in the Yarra Valley before returning to pursue her winemaking heritage at Vinea Marson. Madeleine is passionate about sustainability and growing Italian varieties in a changing climate. In 2023 Madeleine undertook research in this area through Montalcino & Chianti as the Victorian Wine Show travel scholar, before completing the 2023 vintage under Paolo de Marchi at Isole e Olena. A recent Young Farmer Scholar, she is passionate about undertaking projects that improve the health and wellbeing of the vineyard's soils.

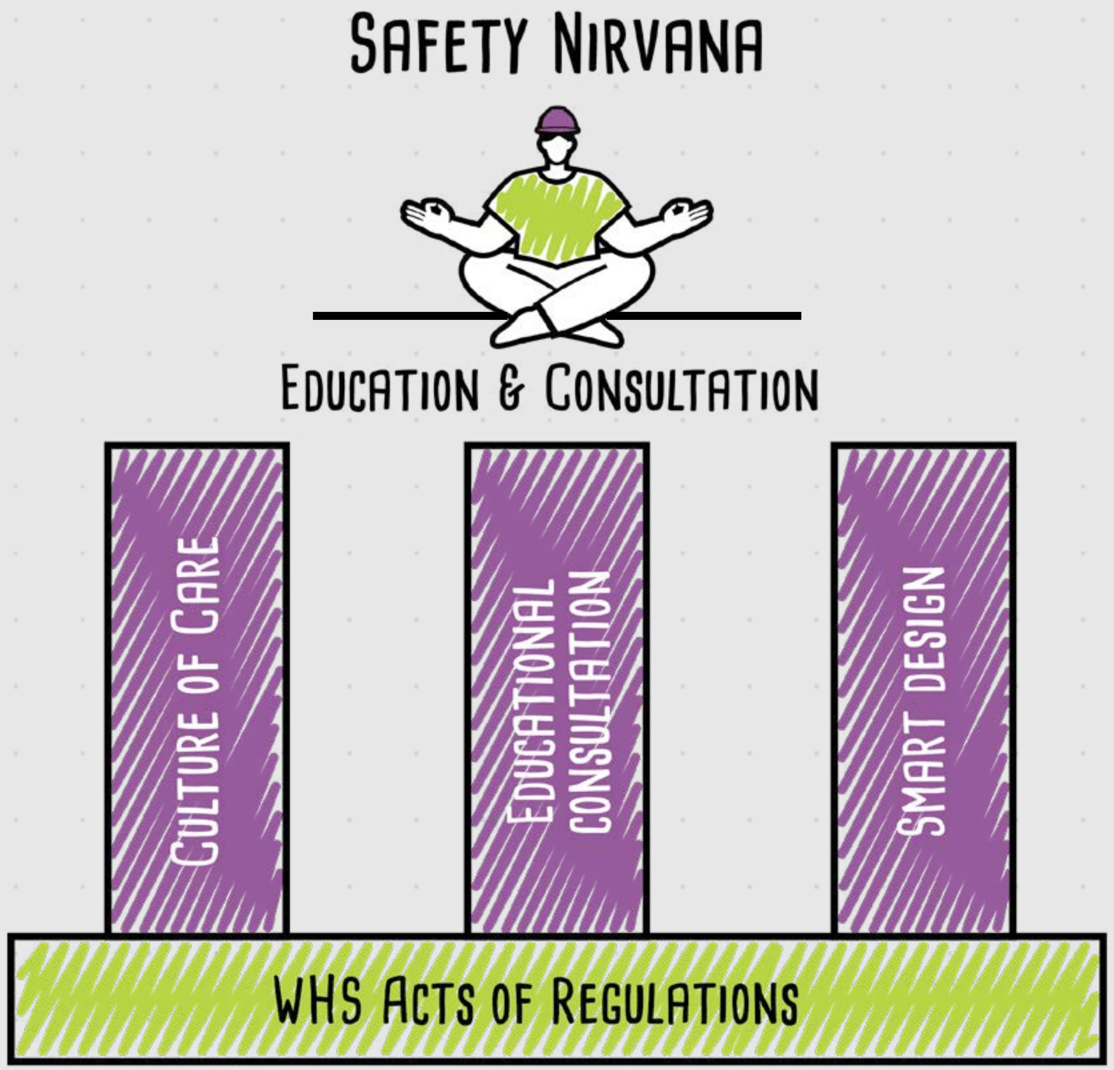
*** Unfortunately circumstances beyond Maddie's control meant that she could not finish her Thought Leadership piece in time for the publication deadline. She is indeed a Future Leader whose leadership we encourage you to follow.*

PEOPLE AND CULTURE

CULTIVATING THE "SAFETY NIRVANA"

Elevating work health and safety standards in the Australian wine sector

by Brendan Hawker



The Australian wine sector, known for its commitment to quality and innovation, faces distinct work health and safety (WHS) challenges. From seasonal pressure and a diverse workforce to varied operational environments, ensuring worker safety and wellbeing is essential. How we raise WHS standards across the industry is paramount – moving beyond compliance to make safety intrinsic to every action.

Safety is always personal. Soon after vintage in 2016, my employer had a random site visit from WorkSafe VIC. It did not start well – as the inspector drove onsite, he noticed someone operating a forklift without wearing a seatbelt. By the time the inspector approached the forklift, the operator had miraculously fastened the seatbelt and denied that it had ever been undone. A foundation of broken trust then set the scene for the next five hours as the inspector pored over our records, plant and equipment. Most items were in order, but the inspection resulted in 16 improvement notices – some straightforward administrative fixes, others requiring capital investment and time.

To work through these improvements and take a position of change leadership, I began reflecting on my experiences and cultural relationship with WHS, and what became evident was an ugly sentiment that "it's all over the top, businesses covering their legal obligations and common sense will prevail". That attitude is not uncommon, and often stems from one-way, dictatorial WHS communication: policies handed down without education or genuine consultation. WHS was talked about, but not modelled by senior staff, so it wasn't reflected in daily decisions. It wasn't personal, but I realised it always is.

While my personal experience is not necessarily the norm within the industry, and many businesses have first class WHS programs, there remains room for industry-wide uplift, to shift from mere compliance to a culture of deep care.

Vision for the future

Imagine if our industry was known for our safety culture. A practical culture where safe choices are the easiest choices and where people instinctively protect themselves and others – a "safety nirvana". This vision is unashamedly aspirational and one we should strive for; we can achieve this through continual improvement: a stronger culture, focused education and smarter design.

Building an effective WHS system for your business is not just a non-negotiable legal requirement; it is the foundation that protects careers, attracts new talent and safeguards the industry's reputation. It can be the critical point of difference in your business.

To achieve this vision, we must have a foundation of compliance and then build three key pillars: 1) Culture of care, 2) Education and consultation, and 3) Smart design.

The foundation: legislative compliance

Before culture, training, or design can take root, every wine business must meet its legal duty of care. In Australia, WHS laws vary by state and territory, with most jurisdictions adopting the Model WHS Act and Regulations. State differences matter in practice, so businesses should confirm their local obligations. Legislation sets the baseline: identify hazards, manage risks, consult workers and provide safe systems of work.

Practical compliance means translating legal requirements into accessible tools: plain language procedures, clear signage and multilingual resources so every worker understands expectations. It's easier than you think – templates for policies and procedures are available online, and with the informed use of AI, they can be quickly tailored to your site's specific needs. Proper compliance builds trust, reduces incident risk and protects business and industry reputation. However, there is more to be gained in safety beyond compliance.

PILLAR 1: Culture of care

Creating a culture of care means WHS is not just about rules but shared values. Leaders set the tone: visible commitment from management turns policy into practice. Key actions of this pillar include:

- leading visibly by modelling safe behaviours and making safety a standing agenda item
- encouraging reporting by removing blame for honest reporting of hazards and near-misses, and using them as learning opportunities
- recognising safety by celebrating safe choices and practical suggestions that improve the workplace
- providing peer support and mentoring by pairing new or seasonal workers with experienced "safety champions"
- managing fatigue by implementing scheduling practices that reduce fatigue-related risk, including managing seasonal demands and preventing excessive overtime
- prioritising mental wellbeing by fostering environments that support workers' mental health by addressing workplace stress, encouraging open communication about wellbeing concerns, and managing workload pressures proactively.

PILLAR 2: Education and consultation

Training must go beyond a one-off induction. Workers need relevant, ongoing and practical learning that connects to their daily tasks. Effective approaches include:

- tailoring training to roles (vineyard, cellar, logistics) and language needs
- using interactive methods such as hands-on practice, toolbox talks and, where appropriate, VR simulations for high-risk tasks
- involving workers in risk assessments and procedure design – practical experience identifying real hazards
- maintaining clear, multiple channels for feedback and ideas
- sharing lessons across the industry via forums and collaborative networks.

Kim Scott includes a great anecdote in her book *Radical Candor* that illustrates this point: "Wanting to combat the cultural taboos against criticising management, Toyota's leaders painted a big red square on the assembly line floor. New employees had to stand in it at the end of their first week, and they were not allowed to leave until they had criticised at least three things on the line. The continual improvement this practice spawned was part of Toyota's success."

This story reinforces how employee consultation is key to making improvements, while culturally putting employee-led reporting front and centre, eliminating fear of reprisal and enabling continual improvement.

PILLAR 3: Smart design

Applying the principles of hierarchy of control, design out risk where possible so that safe choices are easier than unsafe ones. Smart design includes:

- engineering controls such as physical barriers, exclusion zones for forklifts, safer machine guards and elevated work platforms to eliminate hazardous tasks
- digital safety management systems that are user-friendly, cloud-based platforms centralising inductions, risk assessments, incident reporting and corrective actions so information is accessible and auditable
- ergonomic and workflow design by locating PPE where it's needed, creating dedicated pedestrian routes that follow natural foot traffic and arranging cellar spaces and bottling lines to minimise manual handling and awkward postures
- real-time safety communication through mobile apps or simple reporting tools that let workers flag hazards immediately and supervisors respond faster
- data-driven improvement by analysing incident and near miss data to target interventions and justify investments
- maintainability through design for easy maintenance and safe cleaning – reducing the need for risky ad-hoc workarounds.

The tiered challenge

The industry operates in tiers with differing capacities for WHS investment. Support should be tailored so improvements are practical and scalable. Key considerations include:

- large corporate producers
  - > strengths: established systems, WHS budgets, specialist staff
  - > opportunity: moving beyond compliance to deepen culture and worker engagement
- medium-sized producers
  - > strengths: nimble teams, direct communication
  - > opportunity: formalising training, expanding worker consultation and record-keeping
- small/family-owned wineries
  - > strengths: personal commitment, close supervision
  - > challenge: tight budgets, informal systems, multitasking that raises exposure to risk
  - > opportunity: focusing on pragmatic, high-impact fixes – clear procedures, simple exclusion zones, shared industry resources, having safety owned by everyone.

By recognising these differences, industry bodies and suppliers can provide tiered toolkits – practical templates, subsidised training and regional peer networks – to accelerate adoption.

Practical resources and support

You don't have to go it alone. State regulators (e.g. WorkSafe VIC, SafeWork SA) provide guidance and templates and genuinely want you to succeed. Industry bodies such as SAWIA offer tailored programs and advocacy. Their content and the visible priority they place on WHS should be applauded. Consider:

- industry training providers and Registered Training Organisations (RTOs) for role-specific units and short courses for managers and employees to refresh their knowledge and better understand the reasons for WHS programs
- shared services or co-op models for smaller wineries to access safety specialists
- government grants or insurer incentives for capital upgrades and identified high-risk controls.

A lesson learned

That 2016 inspection forced a reality check: paperwork alone doesn't create safety. We implemented exclusion zones for forklifts, reconfigured our barrel hall for safer access by elevated work platforms and redesigned workflows. These changes improved safety, efficiency and quality. Crucially, those changes were informed by worker consultation and visible leadership, which rebuilt trust and delivered early, sustainable wins – showing culture change starts with focusing on the key pillars.

Conclusion: a collective responsibility

Elevating WHS across the Australian wine industry requires everyone – workers, managers, industry bodies, suppliers and regulators – to act together. WHS is not a cost centre but an investment in people, reputation and productivity. Beyond meeting our legal obligations, when we prioritise a culture of care, invest in ongoing education and implement smart design, we can reduce harm, attract talent and strengthen the industry's global standing.

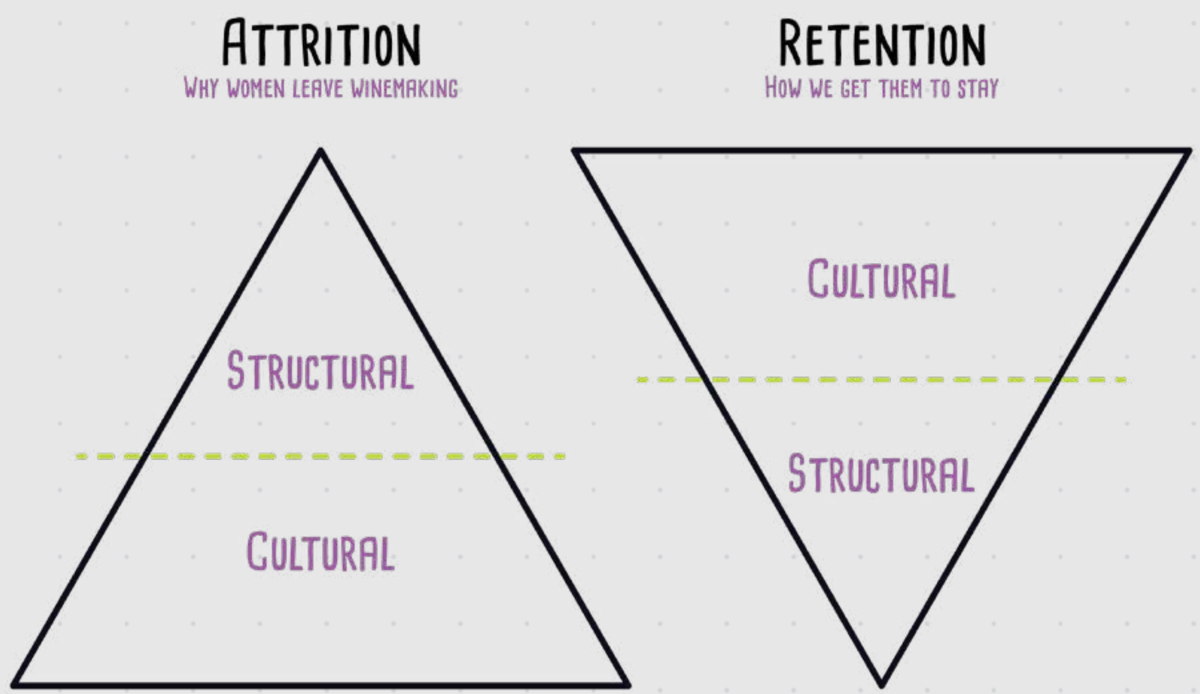
To walk the walk, here are some practical next steps for any wine business, regardless of size:

- Make safety a permanent, visible priority. Include WHS as a standing agenda item in all team meetings, management discussions and board meetings – not just when incidents occur.
- Start with one visible, high-impact action (e.g. forklift exclusion zones, clearly sited PPE or a simple digital reporting tool).
- Involve workers in identifying risks and designing solutions.
- Use industry resources – peer networks, regulator templates and training providers – to avoid reinventing the wheel.
- Track incidents and near-misses and use that data to prioritise investments.
- The journey to "safety nirvana" is ongoing. With sustained leadership, practical design and genuine worker engagement, the Australian wine sector can create workplaces where safety is second nature – and where people thrive as a result.

A CALL TO RESHAPE WINEMAKING

The talent we can't afford to lose

by Callie Jemmeson



Winemaking is an extraordinary career. It is science and art, culture and alchemy, history and innovation at once. Few industries offer such an intoxicating blend of craft and culture. And yet, for all its richness, it remains a fragile and exclusive club, because too many of the people we need most leave.

Women (people who identify as female) enter winemaking in equal numbers to men, often with higher-level qualifications such as bachelor and postgraduate degrees (ABS Census, 2021). They are clearly capable, ambitious and attracted to the industry. So why do they still make up only 16.7 per cent of winemakers? (Wine Australia, 2021; Galbreath, 2024)

Because the system was never designed for them, the structures of production and the culture of the cellar were built in another era, for another kind of worker. Embedded barriers such as bias, rigid expectations and limited return pathways block progression for women just as their knowledge and leadership potential peak. Sadly, these barriers drive permanent losses.

This "leaky pipeline" is a global phenomenon, evident across both private and public sectors. While this piece focuses on women, the barriers are even higher and the losses even greater for non-binary, trans, gender-diverse and intersectional identities. These losses are not inevitable; they stem from structural and cultural barriers, which means they can be redesigned.

Why it matters to business and wine

The wine industry is under pressure: oversupply, falling consumption, shrinking margins and shifting expectations (Wine Australia, 2023; 2024). Competition is fierce, and relevance is fragile. Younger drinkers are fewer in number but higher in expectation. They are not looking for more volume; they are looking for meaning and values (Wine Australia, 2024). If wine reflects that, we stay competitive. If not, we hand market share to other categories and global competitors who are already investing in diversity as a growth strategy.

Innovation has always come from people. Lose talent, and we lose the very solutions we need. Retaining women in winemaking is not about fairness alone. It is about future-proofing the industry. The research is inarguable and clearly shows that gender-diverse leadership delivers stronger team outcomes and sharper decision-making (Harvard Business Review, 2019; McKinsey & Company, 2020). Having women in leadership roles is better for your business, and therefore better for the industry. Women also bridge production and consumer relevance, ensuring wines are not only technically brilliant but also culturally resonant and commercially sustainable. Every loss of a female winemaker means Australian wine risks being not only less diverse, but also less competitive, less responsive and less sustainable.

Why women leave winemaking

Women don't leave winemaking because they lack interest, capability or commitment. They leave because the structures of production and workplace culture make staying untenable. The barriers fall into two categories: structural and cultural.

Structural barriers

Widening gender pay gap: The income gap is real and growing among winemakers. ATO data show women winemakers earned around $7,000 less than men in 2013–14 and around $14,000 less in 2020–21 (Australian Women in Wine, 2024).

Lack of flexible work arrangements, family support, and return pathways: Winemaking is demanding, but flexibility is often treated as incompatible with the role. Few wineries offer family-friendly policies such as equal parental leave or childcare support, and women who seek part-time work or return from parental leave are frequently sidelined, with limited options to re-enter or progress.

Limited access to mentorship and career development: Too many women stall in junior roles because progression relies on informal networks or chance sponsorship – networks they are often excluded from. Mentorship helps, but advice without advocacy rarely leads to promotion.

Cultural barriers

Bias and male-dominated culture: In many cellars, authority is still assumed to be male. Women's expertise is questioned more, their decisions are judged harder, and leadership is held to double standards. Women are left proving themselves over and over. This takes a physical and emotional toll, but the cost isn't just lost talent; it narrows perspective, discourages collaboration and stifles innovation.

Discrimination and harassment: Maternity bias, sexual harassment and exclusionary behaviours remain common, as documented in CSU's Gender Equity Toolkit (2023) and the Respect@Work national inquiry (AHRC, 2020). These practices accelerate attrition and expose businesses to reputational and legal risk.

Tokenism and sexualisation: When women are positioned for optics and gender rather than expertise, credibility erodes, and businesses lose authority in both market and cellar. Tokenism doesn't just harm individuals; it deprives the industry of authentic authority and voice.

The ROI of retention

When a woman leaves winemaking mid-career, it is not just a name off a payroll. Years of skill, knowledge and instinct are walking out the door. It is the perspective she carried into the cellar, the relationships she built with growers, the decisions she would have made at the blending bench. With women making up a significant share of wine consumers, their presence in winemaking ensures products and brands stay relevant and connected to the market.

The financial cost is equally stark. Turnover can reach 200 per cent of salary and, in small wineries, a single departure can unsettle an entire vintage. Retaining and advancing more women in production roles at an industry level could unlock up to $675 million in additional annual revenue (Halstead, 2024, as reported in Riley, 2024). Gender-diverse leadership teams deliver stronger financial performance, clearer decision-making and sharper risk management.

Retention is worth the investment, but stronger cultural solutions are required to underpin the structural solutions.

How we solve the retention problem

Retention isn't mysterious. Women leave winemaking due to structural and cultural barriers. To solve these, we need to invert the problem and focus on broader cultural solutions and then build structural solutions on this solid base:

Cultural barriers → cultural solutions

Redefine authority and culture: Leaders must set the tone that credibility is about skill and leadership, not gender. That means challenging bias in hiring and the cellar, and holding everyone accountable for inclusive, respectful workplaces. Recruitment and promotion should prioritise what a new hire can add culturally and not just be a cultural fit – broadening the team rather than replicating its biases.

Elevate expertise: Visibility matters. When women winemakers are in vineyards, on the blending bench, on panels, or in brand stories, others can see themselves there, too. This isn't about optics; it's about recognising and celebrating existing expertise and showing others like them that they also belong.

Zero tolerance: Codes of conduct, confidential reporting and consequences for breaches are essential in larger organisations. In smaller wineries, it can be as simple as leaders setting the standard: no offhand comments, no excuses. Tokenism ends when women are promoted for capability, not counted to tick a box. Even the smallest businesses must adopt conduct standards and provide training, so leaders feel equipped to address harassment or bias quickly and directly.

Structural barriers → structural solutions

Transparency and accountability: In larger organisations, that means audits published internally, with boards held to account. It can be simpler in smaller businesses: compare roles honestly, check whether men and women are paid equally, and quickly correct gaps. Pay equity is not a perk – it's a baseline that signals whether people are valued fairly.

Flexibility by design: Flexibility can be built into winemaking without compromising quality or seasonal demands. Job-sharing, phased vintage rosters, and return-to-work programs help retain skilled winemakers who might otherwise be lost mid-career. Family-friendly policies such as paid parental leave and childcare support show that caregiving is part of a sustainable career, not a barrier. Other industries have normalised flexible work; wine can do the same.

Sponsorship and pathways: Advice is useful, but careers move when someone with influence opens doors. Sponsorship means senior figures actively nominating women for key roles, projects and networks. Crucially, men must be part of this: they still hold most senior roles, and retention lifts when leaders move beyond mentoring to active advocacy.

The future we choose

With only 16 per cent of women currently holding winemaking positions in Australia, every single one we lose is a significant shockwave the sector can no longer afford to ignore. Before we seek to attract more women to winemaking, we need to focus on retaining the extraordinary talent we have. Progress has been made, but in winemaking, the presence of women is still the exception, not the rule. Too often, this conversation stays in safe spaces: diversity panels, DEI workshops and women-in-wine symposiums. Important, yes, but real change will not come from echo chambers. It comes when those who hold the bulk of power treat the retention and progression of women as a strategic business imperative.

The future of wine will not be determined by tradition alone but shaped by the decisions leaders make today about who gets to stay, who gets to lead and whose voices shape the wines we put into the world. The question is not whether we know what to do, but whether leaders are willing to act. Retention is not a progressive policy; it is a survival strategy. When we redesign the system so women can stay and thrive, we not only keep the talent we cannot afford to lose but also create a future for Australian wine that is more dynamic, diverse and resilient than we have ever known.

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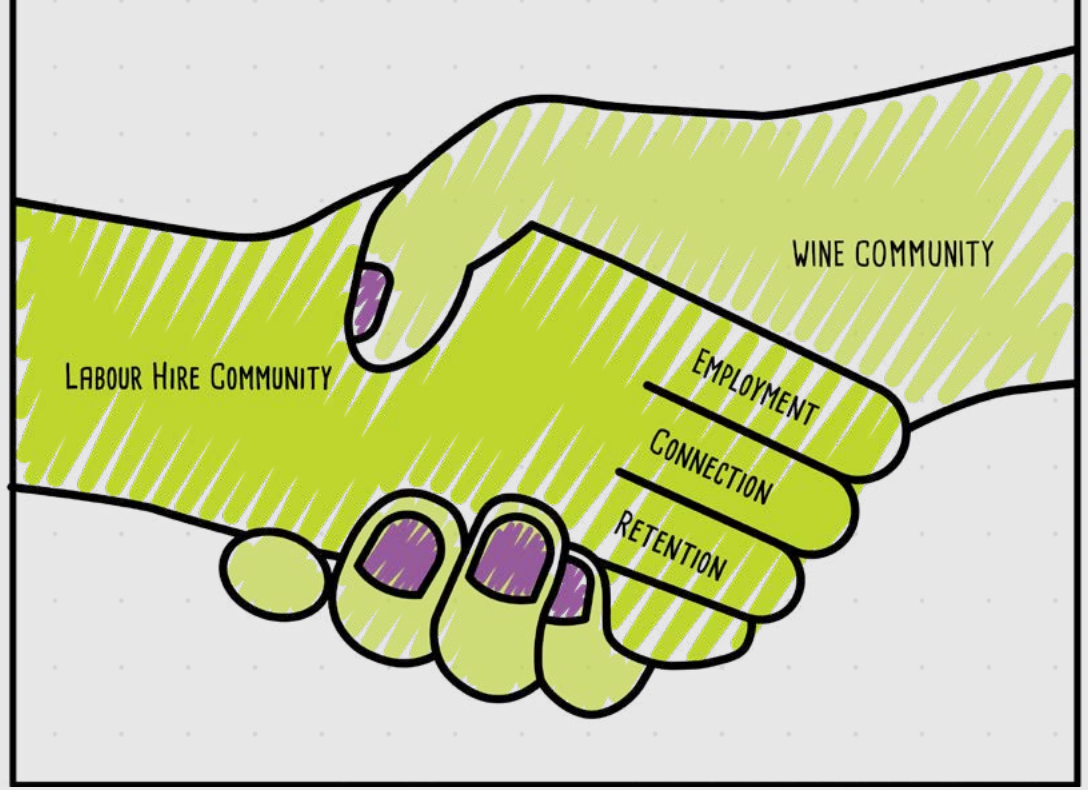
BUILDING A CULTURALLY DIVERSE WORKFORCE

The importance of labour hire to the Australian wine industry

By Nick Baverstock

Respect



A large and often unseen group of people play a crucial role in the Australian wine industry: labour hire workers. When we recognise and integrate what this workforce brings to our vineyards beyond their labour, our businesses are strengthened, and the cultural diversity of this workforce is woven into the story of our wines.

A labour hire worker is employed under a contract with a labour hire agency, which has a commercial agreement to supply workers to a host company. The worker performs tasks for the host company, which pays the labour hire agency; the agency then pays the worker. Without these workers, the industry would face a significant gap in its ability to operate effectively.

They are people from different backgrounds, languages, traditions and beliefs, all of which shape their views. I have had a long-term friendship with a labour hire provider who I use to perform many tasks on our vineyard throughout the year. The couple who own the business are from Malaysia and have lived and worked in the local community for 20 years. Their engagements with my family have given us a deeper perspective on culture, food and settling into an Australian regional community. In turn, we have been able to help them understand the nuances of doing business in the region, as well as the industry and the people who have long been part of it.

Labour hire agencies and the people they employ are an integral part of growing grapes in Australia, often undertaking repetitive, labour-intensive tasks such as pruning, planting, shoot thinning, picking and performing tractor work. These tasks are the foundation for growing fruit and making wine. Up to 25 per cent of the cost of running a vineyard can be attributed to tasks undertaken by labour hire workers.

This workforce is typically made up of linguistically and culturally diverse people from Afghanistan, Cambodia, Vietnam, Malaysia and China. Some may come from marginalised communities seeking a better life in Australia.

> *There are opportunities to address key challenges in the Australian wine industry through building stronger relationships with our labour hire organisations.*

Including:

- meeting labour needs by recruiting high-performing employees from labour hire companies on a casual or permanent basis
- retaining young migrant workers in the wine industry and regional areas through full-time employment and moving beyond seasonal work
- connecting labour hire owners and employees with permanent winery and vineyard staff through meaningful engagement, leading to mutually beneficial outcomes.

These concepts are explored more fully on the following pages.

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With challenge comes opportunity

Industries that use labour hire firms tend to have a primarily transactional relationship with their providers: we engage them to perform a specific task while ensuring both parties meet compliance obligations.

Unfortunately, not all labour hire agencies act in the best interests of their workers, with instances of exploitation, underpayment, poor working or living conditions and harassment just some of the examples we see played out in the media.

As an industry, we have an opportunity to move beyond simply ensuring these essential workers aren't exploited. Instead, we can acknowledge and weave their cultural influence and contribution into the essence of our vineyards and, ultimately, our products.

The relationship with our labour hire provider and their employees should, and can, be more than a transactional relationship. There is an opportunity to further this relationship where both parties can gain a deeper, mutually beneficial connection now and in the future.

Foundation for enhancing relationships

Critically, the foundation to building a stronger, more connected and deeper relationship to benefit both sides must be based on mutual "compliance obligation". Fair pay and entitlements, as defined in the relevant Award, are the backbone of this compliance. Without meeting these obligations, we can't build trust and a deeper connection.

By strengthening relationships with labour hire providers, we can unlock tangible opportunities that also meet pressing business needs. These include:

Opportunity 1: meeting permanent labour shortfall

Agricultural businesses throughout Australia, especially in regional areas, find it difficult to find long-term full-time employees. In my region, the Coonawarra, we have a large base of permanent Afghanis who live in the neighbouring town of Naracoorte, many of whom have lived here for over 10 years. They have become an integral part of the community, but as their children grow, they are reluctant to stay in the region, preferring to go to the cities where they hope to get better opportunities. They see their only local work options as being in a meat works or working for a labour hire company, like their parents.

You can attract permanent migrant workers to full-time job opportunities by:

- partnering with migrant resource centres that facilitate training and local employment opportunities. These centres are located in many regional towns across Australia (see amrc.org.au).
- connecting with local schools and playing a more active role in promoting job and career opportunities within the wine industry.

Opportunity 2: improving connection through understanding and relationships with labour hire workers

There is often a perception in regional communities that people working for labour hire companies have "basic manual skills". Owners and managers of vineyards and farms are generally from European heritage and tend to employ similar people for full-time, on-site jobs, resulting in a largely monocultural workforce. We could go a lot further by breaking down these perceptions and getting to know labour hire workers better. My deeper relationship with a labour hire contractor has given me a greater insight into their background and values and in turn, built stronger respect and admiration for them.

You can improve understanding and relationships with workers by:

- integrating them into the permanent workforce by recognising their contributions to the vineyard. This can be done by including them in key celebrations with permanent staff at key times, including the end of vintage and the end-of-year celebrations.
- talking with contractors and their employees about opportunities to connect.

Benefits of better engagement

The benefits of offering full-time work to young migrant workers include:

- improving understanding and relationships with labour hire employees
- increasing pay and training opportunities to develop skills, and improved work conditions
- increasing connection to the broader (European) community
- retaining workers in the local community and keeping them connected to their families as they contribute to the local economy.

Benefits to the business employing local migrant workers and improving engagement with labour hire companies include:

- fulfilling the labour demand
- bringing diversity into the work team, which contributes to stronger employee engagement, improved problem solving, improved company reputation and potential further talent attraction.

It would be naïve not to acknowledge the challenges in conservative communities associated with integration, which have to be dealt with delicately. Still, I believe these outcomes are easily achievable with good management.

Broader sector representation

I am excited to see Wine Australia initiating projects under their DEI Program, acknowledging that "Future success in our sector is built on practices that support a diverse range of industry professionals, recognising that growth and the prosperity of our regions comes from committed advocates."

We all need to play a role in supporting and advocating for:

1. Stronger industry representation for the labour hire industry at both regional and national levels, ensuring that people of ethnically diverse backgrounds with lived experience are included on advisory groups.
2. Expansion of regional initiatives that have successfully employed and integrated migrant workers, bringing benefits to both businesses and communities.

Strengthening the next decade

Through increased engagement with seasonal labour hire companies and their employees, we have the opportunity to shift from a divided culture in our vineyards to a multi-cultural experience. There are opportunities to create the following:

- Compliance and fair employment as a baseline obligation.
- The successful integration and increased representation of a more culturally diverse permanent workforce within the Australian wine sector.
- Stronger connections between our existing workforce and migrant workforce, recognising their contribution to the future success of the Australian wine industry.

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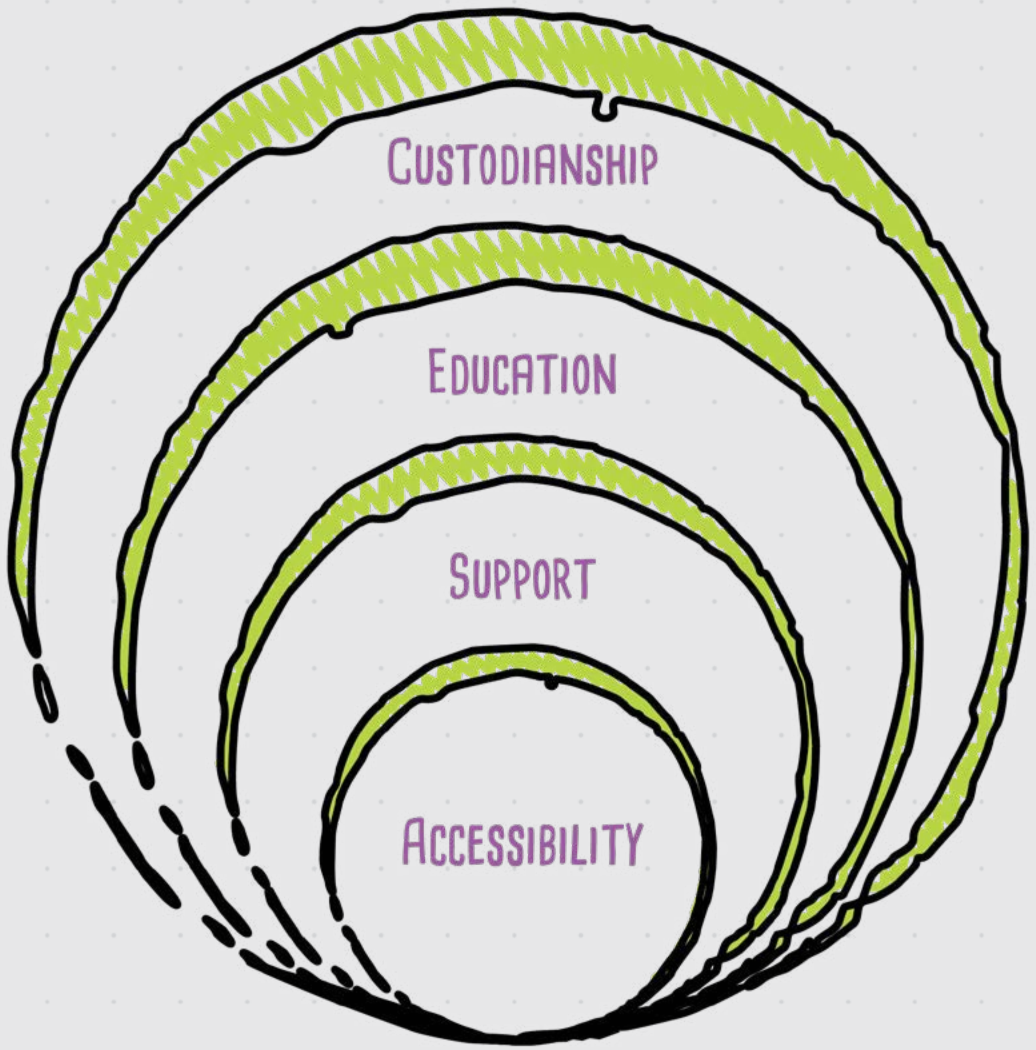
WINE BEYOND THE GLASS

Building a culture of community and custodianship

By Nicola Reid



What is the wine industry if not community? Sharing, storytelling and a sense of belonging that extends beyond the glass are rituals that represent the cultural and social ecosystem around wine. It is grown, made, shared, debated and celebrated, and its meaning stretches far deeper than flavour or status.

Wine connects generations, builds bridges across geography and culture, and becomes a vessel for memory, identity and belonging.

Yet the downside of any strong community is that it can become closed. Wine communities risk being shaped by exclusivity, elitism and self-interest – fragile communities that fail to accommodate diversity or lose sight of the collective responsibility that sustains them.

For the wine industry to thrive, its community must be seen as an evolving ecosystem. The pathway to shape a community from being fragile to being robust requires accessibility, where barriers are dismantled and diverse voices are welcomed; support, where collaboration replaces competition; education, highlighting the importance of knowledge being passed on; and, at the pinnacle, custodianship – the practice of leaving wine's culture stronger than we found it, safeguarding traditions, people and values for future generations. In exploring these critical elements, we'll first consider how we welcome people to the community.

Accessibility

Accessibility is the foundation of any lasting community, and without broad participation, diversity of voices and genuine inclusion, there can be no support, no education and, ultimately, no custodianship. We need to ask, *Who is excluded and why?*

Wine often conjures the image of elitism – excluding those without the means to buy expensive bottles to cellar for decades, enrol in formal education, or travel to prestigious wine regions. If wine is positioned as exclusive and impenetrable, its community remains closed and fragile.

The barriers to accessibility include: economic – the high cost of wine courses and tasting opportunities; intimidating jargon and gatekeeping of expertise; geographical – the concentration of opportunities in metropolitan areas; and demographic - such as underrepresentation of women and younger voices.

Practical efforts to improve accessibility are already reshaping the landscape of wine in Australia. The establishment of Australian Grape & Wine's Diversity, Equity and Inclusion (DEIW) committee demonstrates how tangible steps are being taken to ensure there are seats at the table for underrepresented voices, through creating awareness, acknowledging opportunities for improvement, and, with the support of Wine Australia, collecting data, analysing outcomes and creating a toolkit to set the sector up for continued success. Wine Australia and Sommeliers Australia are national bodies that have introduced scholarships and regional immersion programs, aiming to reduce financial and geographical barriers. These initiatives are a great first step, although our industry must go to much further lengths.

HOME

Accessibility is not only ethically imperative but also the first step towards custodianship, ensuring that a new generation of diverse and engaged individuals will carry wine culture forward.

We need to demystify wine and advocate for clear, inclusive language. These efforts demonstrate that when accessibility is prioritised, the community widens: more people are empowered to engage, contribute and belong.

Once individuals feel like they have a voice in a community, it's key to keep them there through the support provided.

Support

Support is the structure that holds a community together; competition is what fractures a community. Wine is often framed through the lens of competition: producers jostling for market share, sommeliers competing for reputation, or regions positioning themselves against their neighbours. We need to ask the question: *Once we've welcomed people into the wine community, how do we support them to stay?*

Genuine interdependence offers a more sustainable model than competition. Ecosystems thrive on diversity and mutual reliance, so the wine community can strengthen when its members see themselves as collaborators, rather than competitors. When growers share resources, winemakers trade knowledge and educators build networks instead of silos, the result is resilience – a collective capacity to weather challenges like climate change, shifting markets or generational turnover.

In Australia, this collaborative spirit is evident in regional associations that pool resources to promote entire wine regions rather than individual producers. Increasingly, winemakers and viticulturalists share insights on sustainability, water management, or vineyard health for the benefit of others. At the same time, wine educators and sommeliers work to dismantle the gatekeeping that once defined professional circles.

However, this spirit can falter without meaningful support, which is both structural (policy, funding, advocacy) and interpersonal (mentorship, sharing resources). In 2023, the Viticulture and Wine Sector Working Group secured a $3.5 million Grape & Wine Sector Long-term Viability Support Package to help businesses withstand industry pressures. Such support matters not in the abstract but in lived realities: families and businesses questioning whether vineyards can remain viable for the next generation. Without it, community cohesion is at risk of eroding.

Support must flow from many directions: governing bodies, regional associations that represent us, managers and peers. Effective support must also address a diversity of factors – economic stability, environmental resilience, workforce wellbeing and cultural inclusion – all of which underpin the health of the community. Without it, accessibility becomes a revolving door: people enter the community, but without ongoing support, they struggle to remain, progress, or feel a sense of belonging. With it, the wine community grows interdependent, resilient and future-ready.

Once supported, our community grows and thrives through ongoing education.

Education

Education is the thread that weaves participation towards custodianship, passing knowledge, values and culture across generations. It takes many forms: formal programs such as the Wine & Spirit Education Trust, mentoring within workplaces, or even storytelling around a dinner table. Increasingly, that "dinner table" extends beyond the physical – digital platforms, podcasts, and virtual communities now allow people to share knowledge, elevate education and foster belonging across boundaries. Education ensures that the narratives of vineyards and winemakers transform wine from a product into a shared cultural experience. And it starts with the question: *What can we learn together?*

Formalised initiatives, such as the Wine Industry Mentor Program – facilitated by Wine Communicators of Australia, Wine Australia, ASVO and WISA – demonstrate progress in recognising talent and fostering capability. Similarly, initiatives from national organisations such as the Rootlings youth network (via Wine Australia with the ASVO) and Sommeliers Australia are creating pathways for young wine professionals.

However, education must extend beyond selective programs. These rely on applications and selection and therefore cannot reach everyone. If education is seen as the preserve of the privileged, barriers such as high costs, geographic isolation or lack of networks can leave talent untapped. Innovation and generosity are required – not only in scholarships or mentoring programs, but also in strengthening networks that link individuals across regions and roles. When the intention to teach, learn and share is embedded in everyday interactions – through collaboration, mentorship, or simply opening a bottle together – it strengthens culture.

Providing greater opportunities for education equips individuals not only with skills and language but also with the values and sense of responsibility that underpin custodianship. It is the vital link that transforms a group of individuals into a living, interconnected ecosystem – one capable of sustaining itself across generations.

Custodianship

Custodianship represents the pinnacle of community. It asks the pivotal question, *How can we leave it stronger than we found it?* and engages in deliberate action. Accessibility opens doors, support builds structures, education passes knowledge, and custodianship ensures continuity and longevity. It is stewardship of land, people, traditions and values, transforming a community from a collection of individuals into a living, evolving, intergenerational ecosystem.

Each generation of growers, winemakers, sommeliers and educators holds wine only in trust.

Our responsibility is to care for the land, preserve traditions and nurture the people to sustain it. Custodianship takes many forms. Environmental custodianship means sustainable practices in water use, soil health and vineyard management – ensuring the next generation inherits a landscape resilient to climatic pressures. Cultural custodianship preserves stories, styles and historical practices so wine continues as a vessel of identity and heritage. Human custodianship centres on mentorship, inclusivity and the wellbeing of those who make up the industry.

These commitments are visible today. Programs like Sustainable Winegrowing Australia lead on environmental responsibility, while regional associations and educators safeguard and share culture and knowledge. Wine Australia, in its national brand platform, explicitly acknowledges the Traditional Custodians of Country and is backing this up with a Reconciliation Action Plan – reminding us that wine's story in Australia is inseparable from the deeper narratives of land, care and continuity.

Ultimately, custodianship calls us to think beyond ourselves. It orients us towards the future, recognising that the health of the wine community depends on collective care, not individual gain. Without custodianship, communities are transient and fragile; with it, they endure, evolve and flourish.

During a Future Leaders experience at Fingal Head, we were taught to braid tree bark into rope. Each strand on its own was fragile, but together they became strong – a living metaphor for how the wine community is strengthened when land, people and culture are woven with care and reciprocity. Each of us has a chance to leave these elements better than we found them.

Conclusion

Wine, at its heart, gathers a community – but we can't leave this to chance; it requires cultivation. Our industry – no matter which role we play – is sustained by the collective care of those who grow, make, share and enjoy it. To build a deeper, more enduring wine community, accessibility opens the doors and welcomes diverse voices, support fosters resilience and collaboration, education passes knowledge, values and culture to new generations, and finally, custodianship ensures that the community endures beyond the individual.

Custodianship is our responsibility. It is the ethic of leaving the wine industry better than we found it – nurturing people and land, safeguarding stories, practices and knowledge that define its culture. It recognises that wine transcends consumption; it is a living and evolving ecosystem.

The true measure of success is not what we take from the glass, but what we leave behind.

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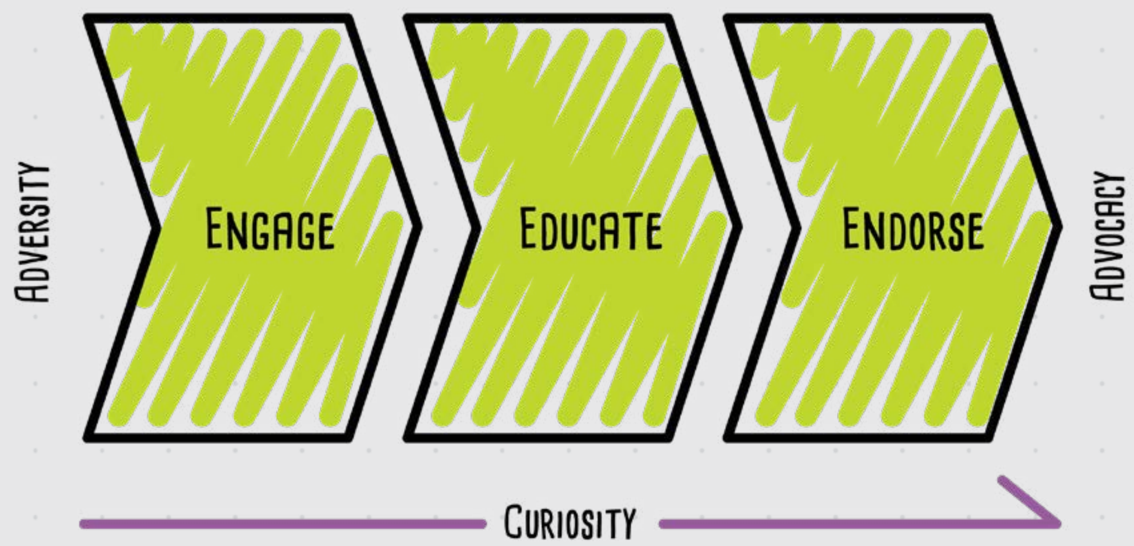
SALES AND MARKETING

CURIOSITY SAVED THE CAT(EGORY)

By Emma Brown



While the wine industry faces one of the toughest economic times in modern history, leaders, makers and champions must look beyond the norms of our category and advocate for industry evolution to ensure a sustainable future. People are prematurely abandoning the wine category at unprecedented rates, and perhaps it's time to consider whether our unconscious internal resistance to change is only exacerbating this trend.

Despite ongoing deliberations about diversification and adapting to consumer preferences, certain longstanding perceptions within the sector continue to act as barriers to innovation and success. In my experience in the industry, the mere mention of evolution, whether through alternative formats such as aluminium or PET bottles, wine in cans, spritzers or zero-alcohol, often elicits scepticism or dismissive attitudes among seasoned professionals.

This raises a critical question: Are we inadvertently limiting our growth potential through narrow perceptions of what wine is – or what it should be?

As custodians and champions of the industry, we must recognise how our perceptions and attitudes influence the overall market acceptance. If we fail to support and promote innovation and the adoption of category evolution within our own ranks, we cannot expect gatekeepers such as retailers, restaurateurs and distributors, or most importantly, consumers, to consider these emerging categories.

As a sector, we are very good at celebrating successes and admiring each other's great work when it comes to making wines within our comfortable definitions of the category – ordering a six-pack of someone else's trophy-winning Riesling from the latest wine show or attending a barrel tasting to showcase their last vintage. Yet as soon as a maker stretches those boundaries into something new and different, we flinch, speculate and dismiss, leading to negativity, adversity and, too often, failure.

Harnessing the magic

The wine sector is longstanding, unique and resilient. There is a sense of magic and mystique in our craft that gives it a tenacity and prestige unlike other categories – qualities we cannot simply discard in the pursuit of quick wins or short-term success. There are perceptions and rules to uphold, not because it's easy, but because it's right; centuries of legacy have helped build and solidify the wine industry to be what it is today. Our industry must harness what makes us special and what connects people to wine while evolving to remain sustainable and relevant for the future. This will unlock our ability to continue doing what we love – making great wine. And it must start at the top, with leadership, passion and advocacy for evolution.

> *"Change will not come if we wait for some other person or some other time. We are the ones we've been waiting for."*
> *– Barack Obama*

Advocacy is not about talking the talk; it's about walking the walk and empowering yourself and those around you. In the wine sector, advocating for the future of wine is not about discussing the shopping list of problems – that we are losing consumers at an exponential rate and that wine is losing relevance – and then waiting for someone else to fix them. It's about taking action.

Advocacy is about curiosity and an openness to change, regardless of the discomfort it may create in your perceptions. It's about championing for the industry's future – balancing what makes wine special today with what will expand its relevance and remarkability in the future.

Industry leaders should consider advocacy a responsibility and approach it open-mindedly. We, as sector leaders, might consider four stages of advocacy when truly committing to the evolution of our category:

1. ENGAGE: show curiosity and commit with an open mind

The simplest step of advocacy is also the most powerful. Engagement isn't just showing up – it's approaching with curiosity, a desire to listen, an openness to be challenged, and receptivity to be influenced. Authentic engagement is a commitment to the long-term success of the sector and a willingness to put prior perceptions aside and approach with an open mind for the sake of the future.

Engagement means showing up with "help me understand" rather than "that's how we've always done it". It invites flexibility in thinking and allows you to consider true change and expansion.

A live industry example is the fruit-flavoured spritzer category, which is growing by more than 300 per cent in the Australian market. At a recent industry engagement, many were reluctant to approach it with an open mind, labelling it a "fad" or a "soft drink". In reality, it represents an evolution of the wine category that is actively recruiting new consumers – people who may later become Barossa Shiraz or Claire Riesling drinkers. Supporting this growth allows those in our industry to continue doing what they love: making great wine. It just takes an open mind to recognise the opportunity and support it from within.

Engagement is the first step in opening the door to curiosity and committing to learn, grow and expand beyond your current thinking.

2. EDUCATE: ask the questions and learn the facts

Too often, I have encountered assumptions about category expansion that lead to a lack of advocacy within the industry for new and different ideas. Recently, I was dumbfounded by an industry professional's declaration that "Zero alcohol wine isn't even wine". Upon querying this statement, I learned they had assumed zero alcohol wine is not made entirely by grapes and does not go through the fermentation process – two assumptions which, in most cases, are untrue. These kinds of assumptions and declarations are malignant to the growth of our category, stifling advocacy from within the sector for an emerging category that could recruit new consumers and retain those considering leaving.

Education should be the easiest step; however, it's often hindered by our assumptions, presumptions and resistance to information that challenges what we believe to be true. Expanding your thinking through fresh knowledge is crucial, but applying that knowledge with perspective is equally important. When engaging your curiosity around category expansion, the key question should be: "How does this benefit the category overall for the long term?" The natural follow-up then becomes: "And what does that mean for me?" Nine times out of ten, I believe the response will be that if the category benefits, every stakeholder will also benefit in the long run. Perhaps you're not inclined to produce a zero-alcohol wine at your winery. Still, I'd bet my bottom dollar that recruiting new consumers into the category and retaining those who are leaving through zero alcohol will one day start benefiting you.

3. ENDORSE: use the framework to become a true industry champion

Endorsement is the act of publicly showing support, and for us, this is crucial. Wine advocacy needs to play out in the public arena to gain cut-through in a highly cluttered environment. Endorsement can happen in big moments of influence (i.e. a public address or a media interview) or casually through conversations with customers, trade, consumers, friends and family. At both ends of the spectrum, it's about being positive and cohesive.

You may not choose wine in a can, or you may not enjoy a lemon-flavoured wine spritz; however, you are still responsible for the future endorsement of the wine category – and you will benefit from the category expanding and, in turn, succeeding.

Endorsement is about supporting the curiosity of others and being willing to be continuously challenged while broadening the perspectives of those around you for the greater good of the category.

Enduring advocacy: crucial for achieving a win-win

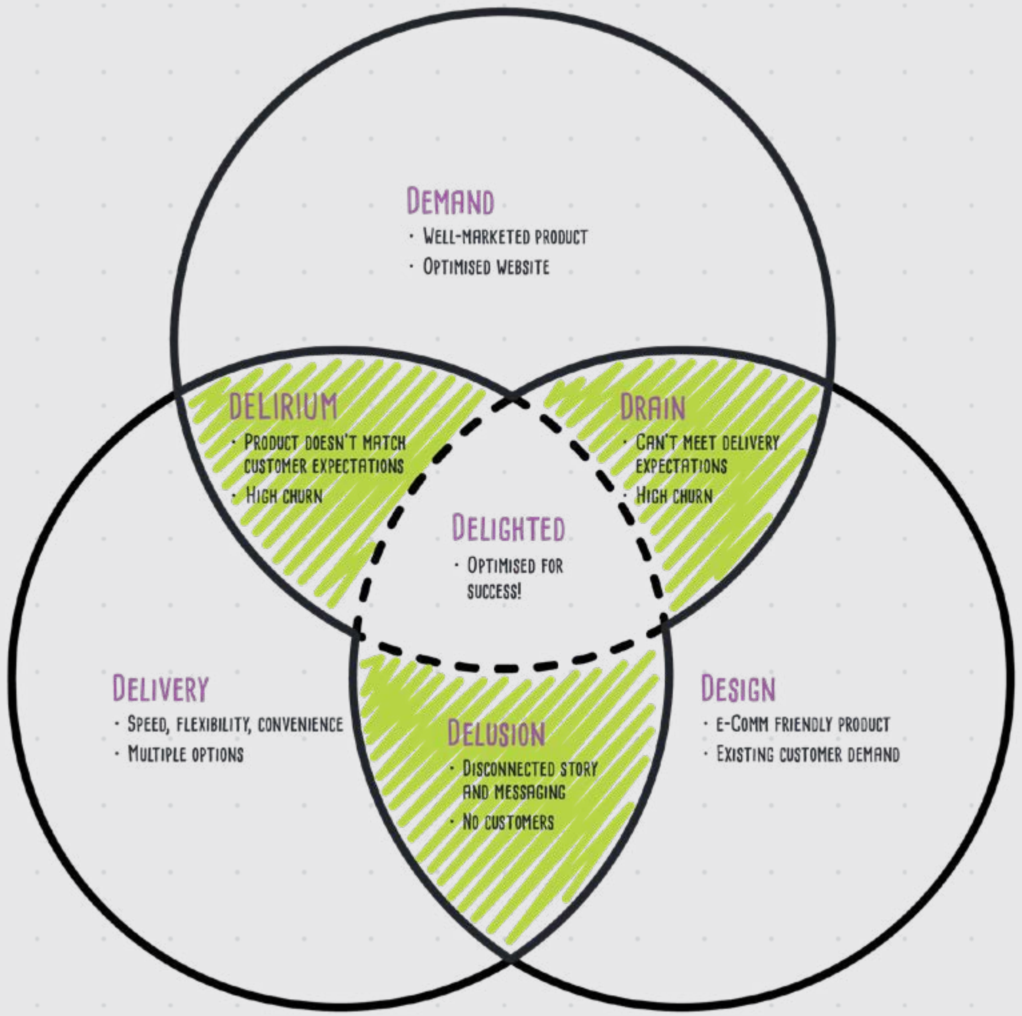
In conclusion, the future of the wine sector depends on our collective willingness to challenge outdated perceptions and embrace innovation. By fostering internal advocacy and demonstrating support for category expansion, we can retain existing consumers and attract new ones by expanding the category's relevance.

A curious, open-minded approach is essential to embark on this journey of cohesion and advocacy so we can achieve a mutually beneficial outcome and unlock the full potential of the wine category, securing its sustainability for generations to come.

YOUR ORDER IS DELAYED

Why wineries are falling behind in the e-commerce race – and how to fix it

by Lachlan Aird



HOME

With Australians spending more online than ever, the post-COVID dip in winery website sales raises an important question: Why aren't more people buying wine directly from producers like they do in other categories?

The Wine Australia Direct to Consumer (DTC) Report 2024 offers key insights into how consumers interact with wineries. Comparing 2023–24 with 2021–22, net sales have grown 4 per cent, cases sold 2 per cent, and wine club memberships 3.2 per cent. Yet the proportion of online sales has dropped from 18 per cent of net sales in 2021–22 to 14.3 per cent in 2022–23 and 14 per cent in 2023–24 (Wine Australia, 2024).

Wine Australia describes online sales as "stabilised post the COVID spike" (Wine Australia, 2024). Still, it may be more of a warning sign when viewed in the context of overall Australian e-commerce.

In 2024, Australian online sales hit a record $69 billion, doubling 2019 figures (Australia Post, 2024). With 86 per cent of Australians shopping online – only 2 per cent down from the height of COVID – most other industries are growing their online sales year-on-year (Australia Post, 2024).

Part of the decline in online wine sales is understandable – cellar doors have reopened and competition from major retailers has increased. Yet the unique number of customers across all channels has also dropped by 5.8 per cent (Wine Australia, 2024). This indicates fewer people are buying directly from wineries, even as the most loyal customers spend more, which explains the lift in net sales, cases and wine club memberships.

This pattern is echoed in broader liquor retail data. Online liquor sales have increased 107 per cent over the last decade to a record $1.9 billion, yet the number of households purchasing online has fallen from a peak of 1.4 million in 2021 to 1.1 million in 2024 (Australia Post, 2024). While this supports the trend of consumers moderating their drinking habits, it also suggests a significant cohort of lapsed DTC wine buyers who engaged during COVID but have not returned.

Arguably, this drop-off stems from systemic issues with DTC wine *Delivery, Design* and *Demand*. Learning how to adapt better to modern consumers from other industries can help future-proof the sector.

Delivery

Almost two in three Australians admitted they wouldn't repurchase from a brand after a poor delivery experience, and expectations are higher than ever with the rise of global players like Amazon and Temu. The most active online shoppers – those aged 18–34 – shop nearly twice as much as older generations (Shippit, 2024).

There's been a lot of effort to attract younger age groups to wine, but frictionless e-commerce experiences shape their online shopping expectations. That helps explain why 77 per cent of DTC wine sales still come from Generation X and Baby Boomers, who are more likely than younger consumers to buy from cellar doors and join traditional wine clubs (Wine Australia, 2024).

Convenience, speed and flexibility have become non-negotiables in online retail. Unfortunately, the typical DTC wine delivery experience offers none of these. Wine is heavy, fragile, costly to ship and temperature sensitive, requiring manual handling at every step.

Meanwhile, half of online shoppers want multiple delivery options, including express and same-day (Shippit, 2024). Such options are virtually non-existent for most DTC wine sales due to limited freight partnerships and infrastructure; however, they are available through many major liquor retailers.

While competing with the speed offered by major retailers is unrealistic, DTC can still win by making the delivery experience feel more premium, even if it's slower. Transparent shipping expectations with live tracking and SMS notifications can mitigate delivery anxiety, particularly if the unboxing experience (i.e. loyalty programs, thoughtful packaging and personal touches) feels worth the wait.

Post-purchase care is just as important as the sale itself. Was the customer thanked? Was the packaging impressive and eco-conscious? Did they receive suggested pairings, exclusive content, or a reward for loyalty? If something went wrong, was it fixed quickly, politely and thoroughly? These small touches create a premium DTC experience that encourages customers to return.

In a market where acquiring new customers is expensive, retaining and nurturing existing ones is critical. It's not just wine being sold – the whole buying experience is what keeps customers coming back.

Ultimately, the biggest opportunity lies in facilitating faster shipping for DTC, which could be achieved by rethinking the product's *Design* to better suit the e-commerce landscape.

Design

If wine were invented today, it's unlikely it would be sold in 750mL glass bottles. While glass adds elegance and romance – and is essential for cellaring – most wine sold in Australia is consumed within days. In that context, glass is more of a liability than an asset, which is why many new beverage innovations avoid it.

Alternative formats already exist, but they come with baggage. Take the cask, for example: it keeps wine fresher for longer, aligns with moderate consumption trends, is far more durable and easy to ship, and produces significantly fewer carbon emissions than glass.

And yet, cask wine remains stigmatised. The perception of low quality persists despite proven environmental and logistical benefits. Part of the problem is that even premium casks often contain entry-level wines, due to cost and margin challenges. Consumers are unlikely to change their minds until truly top-tier wines are presented in a cask – with pricing, branding and storytelling to match. The same logic applies to cans, pouches and PET bottles.

Imagine if wineries were incentivised to put their top-performing, household name wines in alternative formats that better serve today's consumer. Wines that consumers trust with proven quality, reliability,

accessibility and value, both on- and off-premise. What if these wines were available in e-commerce-friendly formats and commanded a fair price, providing value to both the producer and consumer?

If industry bodies removed the financial and reputational risk for producers to explore alternative formats for their success stories, they would be more likely to test new options to grow DTC sales and create a new category for revenue.

While consumers still equate heavier bottles with higher quality, perceptions shift when personal benefit is clear. Countries like Sweden and Norway, driven by sustainability goals, have normalised high-quality wine in casks. Alternative formats need not replace glass bottles but can provide customers with more choice, unlock new revenue streams for producers, and attract consumers seeking convenience and flexibility through e-commerce.

Think of how Koala transformed flat-pack mattresses into an e-commerce success story. While their innovations didn't replace traditional furniture, they added a new category built on convenience and flexibility, giving consumers more choice. The same opportunity exists for wine.

Designing wine for e-commerce isn't just about the package that arrives on the doorstep – it's also about the digital storefront that sells it. Once the product is fit for purpose, the next challenge is ensuring the online experience inspires *Demand* from customers to buy it.

Demand

To win online, wineries must rethink how they market and sell. Most winery websites juggle too many tasks – telling the brand story, promoting the cellar door, outlining club benefits and selling wine. The best e-commerce sites do one thing exceptionally well: they make buying easy.

That means fast-loading, mobile-first experiences that prioritise the customer journey to conversion. A website's success should be judged on how easy it is for a customer to purchase or book – not on how thoroughly it recounts the vineyard's history. Nike's origin story fills books and films, but not its website.

Creative content should also be refreshed regularly to reward return visits, integrating brand and storytelling to show rather than tell. Luxury fashion houses treat every season as a campaign launch. Wineries could do the same, using each vintage as a chance to re-engage consumers with something fresh.

Many winery websites remain unchanged for years. They don't undergo A/B testing, aren't optimised for conversion, and don't track user behaviour to refine layout, copy or checkout flow. In e-commerce, a website is never "finished" – it requires constant refinement to stay functional and competitive.

This optimisation is standard practice for major retailers competing for DTC wine sales. The tools are readily available to wineries, often at low or no cost. What's missing is investment in digital skills. While algorithms are opaque and platforms evolve, smaller brands can still thrive by being visible, strategic and persistent. That means committing to social media advertising, email marketing, search engine optimisation, and creating content that resonates with the target audience.

Effective digital marketing will build *Demand* – provided *Delivery* and *Design* are right too.

Deadline

The wine industry may not have predicted COVID, but the boom in e-commerce was foreseeable. If the wine industry had been more digitally prepared, perhaps the current drop in online DTC sales wouldn't be so stark.

Some of the responsibility lies with individual wineries – their websites, marketing strategies and customer experience. However, structural issues with the product itself also require attention.

The next generation of wine drinkers is digitally native, discerning and demanding. They want quality wine but also speed, convenience and sustainability. To win them back – or win them over for the first time – DTC must be treated as core business.

Delivery, *Design* and *Demand* aren't supplementary – they're the foundations of proving wine belongs in modern e-commerce.

To beat the *Deadline*, it's not just about what's in the bottle – it's how well it gets into the hands of consumers.

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THE MOST EXPENSIVE MISTAKE IN WINE

Why underinvesting in marketing is costing the industry billions … and how the ladder model shows a way forward

by Tash Stoodley

What if the wine industry's greatest untapped opportunity has been hiding in plain sight? Look beyond the vineyard and cellar. The real potential lies in a powerful yet overlooked engine: marketing strategy.

But what does that engine look like at full power? Imagine a system where marketing builds demand, fuels innovation and funds growth, transforming your brand into an asset as valuable as your oldest vines.

Imagine unlocking $3 billion in lost revenue. That's the potential for those who strengthen their branding, shown by Wine Australia modelling. This isn't just about raising prices but building a robust foundation that retains talent and fuels consistent growth.

The refrain, "We can't afford marketing right now", is a trap. Delaying investment makes the eventual comeback steeper. Every silent month erodes margins and cedes ground to competitors.

The effects are a silent crisis: incredible work goes unseen, and one-time buyers drift away. Worse yet, the expertise needed to grow begins to walk out the door. Talented marketers seek environments where they can build, measure and win. Without investment, there are no clear career pathways, no budgets for bold ideas, and no training to hone their craft. This turnover creates a costly cycle of rebuilding and lost knowledge.

Marketing is not discretionary. It's the essential infrastructure for demand – the bridge between a masterpiece in the cellar and a customer who cherishes it.

So, where do you stand on the marketing ladder? Every rung unlocks new value. But the ladder doesn't stand without rails. The rails are strategy, keeping each rung aligned, connected and pointing upward. Without strategy, activity slides back into noise.

The first step is realising how much you have to gain.

RUNG 1: Craft without clarity

Imagine crafting a masterpiece only to hide it in a basement. This is the reality for wineries at the base of the ladder, who pour passion into production but invest nothing in marketing. They operate in obscurity, hoping their wine alone will speak for itself.

But the market is shouting too loudly. The era of riding on reputation is over. Shelves are battlegrounds, and consumer loyalty is fleeting. Without a voice, even the best wine gets lost. Inventory becomes a burden, margins shrink, and the desperate cycle of discounting begins.

The cost of silence is a dwindling future. Cash remains trapped in unsold stock, starving the business of resources needed to adapt or grow.

The pivotal step off this rung is a liberating shift in mindset. It's the recognition that excellence in the cellar only finds its full value through excellence in reaching the market. And that begins with a simple truth: even the world's best craft remains hidden without a plan to be found.

RUNG 2: Scattered stories

Here, a winery finds its voice, but only in short, scattered bursts. A brilliant vintage release. A vibrant tourism campaign. For a moment, it shines. But when the campaign ends, the voice falls silent, and the market's attention moves on.

This is the illusion of progress. A burst is not a strategy. Without a consistent presence, visitors find no reason to return, mailing lists grow cold, and partners gravitate to brands always in their ear.

Contrast this with the steady drumbeat of consistent marketing. It's the difference between a shout and a conversation. It forges recognition, builds trust and delivers reliable revenue. Episodic marketing is like pruning a vine once and expecting a harvest for years; true growth requires constant care.

The winery faces an exhausting cycle: a fleeting win followed by a long silence, constantly paying to re-acquire customers.

The step-up means replacing uncertainty with momentum. Shifting from sporadic bursts to a sustained voice brings predictable growth, lower costs and a community of loyal advocates. The ultimate aim is a brand that endures.

RUNG 3: Insight investment

This is where marketing transforms from a cost into a capability. Wineries use data to shift from guessing to knowing, pinpointing who customers are, what inspires them to buy and why they leave.

This insight is transformative. Instead of scattering budget, you invest confidently in attracting high-value prospects.

This approach makes retaining skilled marketers a strategic priority. Replacing one can cost 125–150 per cent of their salary. For a $90,000 role, that's a $135,000 loss, often eclipsing the entire marketing budget, plus lost momentum and knowledge. Investing in your people is the essential safeguard for your engine of growth.

The conversation flips when leaders see results like a 20 per cent lift in conversion or a 15 per cent reduction in churn. The question is no longer about cost but how to build on the gains.

This step turns vulnerability into strength. By moving from sporadic activity to intelligent investment, you gain stability, secure your budget, deepen loyalty and lower costs. Growth becomes predictable, powered by insight.

RUNG 4: Strategic strength

Here, the strategic rails are fully engaged. Marketing transforms into a sustained operating discipline, guiding decisions from vineyard to brand. It's a protected, non-negotiable priority, measured by KPIs that directly drive growth.

This discipline empowers you to pursue long-term opportunities. Consider Wine Australia's Strategy Plan 2025–2030, which identifies major growth opportunities in the NoLo and mid-strength alcohol categories. Capturing this demand requires sustained brand building, not short-term promotions. It needs calendar-based planning and evidence-guided investment.

We see this in forward-thinking consumer brands that anticipate shifts, launching products years before demand peaks. This is how you future-proof wine: align production with consumer preferences and build a brand that endures.

The gains are undeniable: steady growth, protected margins and clarity for bold decisions. You're no longer reacting to the market; you're shaping it. This means integrating marketing as a strategic capability to ensure your wines win not just medals, but lasting market dominance.

Rung 5: Market mastery

At the peak, marketing is at the heart of your identity. It informs every decision, from vineyard planting to global expansion. Innovation and product creation flow from a clear brand position and deep market insight.

Here, the engine generates its own momentum. A self-sustaining cycle emerges: brand value attracts premium customers, which funds R&D for breakthrough products that reinforce prestige and command higher margins. In time, the brand becomes a cultural asset, guarded as fiercely as the vineyard's heritage.

This mastery is evident in global leaders. Champagne and whisky houses have spent decades weaving their stories into culture, making scarcity and prestige inseparable. This iconic status is no accident; it's the reward for sustained, high-value marketing commitment. This is an achievement well within reach for Australian wine.

At this height, top marketing talent seeks you out. The market doesn't just know your name; it anticipates your next move. You lead the conversation.

The rewards are the ultimate goals: unshakable pricing power, generational loyalty and compounding growth. The final step is your evolution from participant to pioneer. You become the voice that sets the tempo for the entire category.

Why marketing can't wait

Strong marketing builds pricing power, forges loyalty and creates resilience. It compounds returns by linking decisions to demand. Without it, market share and relevance slowly erode, leaving wineries fighting harder for shrinking returns.

2035: Two possible futures

If we climb the ladder, marketing becomes deeply embedded across the entire sector, guiding decisions from the vineyard to export markets. Technology handles routine tasks, freeing marketers to focus on what humans do best: building brand, telling stories and driving strategy. Australian wine reclaims its global relevance, commanding premium pricing, building brand equity and earning lasting prestige.

If we stay at the first rung, oversupply persists, margins weaken further, and customer loyalty continues to fade. Many wineries disappear or are absorbed by large conglomerates. Marketing remains reactive and underfunded, shrinking Australia's global relevance and making recovery increasingly difficult.

From campaigns to capability

Our industry has always celebrated craftsmanship in the vineyard and cellar. Now it's time to apply that same disciplined approach to marketing. Moving up the ladder isn't about abandoning tradition; it's about securing its future.

This shift requires two strategic rails: making marketing a first priority in the budget – not the last – and recognising it as essential infrastructure for growth, premiumisation and relevance. Without this foundation, even the most exceptional wines risk remaining unseen and unsold.

The decision to climb rests with owners and boards. Choosing to invest is choosing a future where Australian wine leads globally. The ladder is here. The rungs are clear. Now the question is how many will choose to climb, and how far we can elevate our entire sector together.

Image Credit: Andre Castellucci. Featuring Astria Adelaide Hills Sparkling by Catlin Wines. Image and permission to use supplied by Tash Stoodley.

Modelling sources: the $3 billion opportunity

Export uplift estimate

If branding and marketing improve the average export price by $0.50–$1.00 per litre

Volume: ~639 million litres exported at the average value of $3.88/L (Wine Australia Export Report, 2025, p. 1)

Calculation:

639 m L × $0.50 = $320 m
639 m L × $1.00 = $640 m

Range: $320–640 million

DTC and domestic growth potential

Domestic wine consumption = 466 million L (Wine Australia Domestic Sales Dashboard 2024)

With improved marketing, loyalty programs and premium DTC channels, a 10–25 % uplift in value is achievable.

Calculation:

10 % of $3 b = $300 m
25 % of $3 b = $750 m

Range: $500 million – $1.25 billion

Domestic premium pricing

Domestic market ≈ $3 billion annually

Average bottle $8–9 (commercial) → ~$20 (premium). (Wine Australia Domestic Sales Dashboard, 2024)

A 10–20% premiumisation uplift through stronger brand equity.

Calculation:

10% × $3 b = $300 m
20% × $3 b = $600 m

Range: $300–600 million

Talent loss and turnover costs

Marketing and mid-level role replacement = 125–150% of salary (Sparkbay)

Example:

$100,000 salary → $125,000–$150,000 replacement cost

Each mid-level marketing departure ≈ 1.25–1.5 × salary in total cost (recruitment + onboarding + lost productivity).

At scale, retaining 200–300 skilled staff across the sector could avoid $300–500 million in lost value.

Range: $300–500 million

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CUSTOMERS AND RELEVANCE

Image Credit: Tasley Mortimer. Features Mortimer Sparkling Curvee in Orange, NSW. Image and permission to use supplied by Daniel Mortimer.

LET'S POP SOME WINE CULTURE

Building current connections with tomorrow's wine drinkers

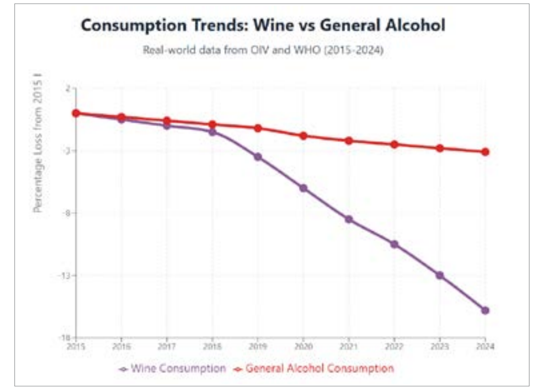
by Daniel Mortimer

It's a wonderful thought, imagining the rooms that wine has occupied throughout iconic moments in history. The legendary figures who nursed a glass (or goblet) to their lips in their defining moments. Would Cleopatra have seduced Julius Caesar without the flirtatious nature of wine? Did avid wine lover Thomas Jefferson almost spill a drop of his favourite Bordeaux on the Declaration of Independence? Were the elegant strokes of Shakespear's quill creatively lubricated by wine when writing his greatest love sonnets? And Jesus Christ's greatest miracle? You get the gist. For at least 8,000 years, wine has been more than just a beverage shared around a table; it has been part of the human story. Etched in stone, painted upon grand ceilings and recorded in the holiest of documents. Wine has been present through wars, revolutions and renaissances, all while remaining relatively unchanged. It has been constant, classic and enduring. But with wine production and consumption at its lowest in 60 years, will the love affair between humankind and wine get its happily ever after?

Temporary downturn or structural decline?

Let's make wine sexy again!

I'm not going to get bogged down in the ever-contradictory statistics of alcohol consumption and trends. At a high level, no matter how you look at it, alcohol consumption is decreasing worldwide at an average rate of 0.3–0.4 per cent per year (Manthey et al., 2019). Research indicates a wide range of factors including cost of living, lifestyle choices, social trends, health issues and, of course, Gen Z. These factors are not necessarily the sector's fault, but they are our problem. The alarming global decline in market share is far more concerning with wine consumption falling 2–3 per cent worldwide (2024 Beverage Alcohol Year in Review, 2025). Now that is our fault. I won't accept that the quality of wine has suddenly decreased. In fact, I'd argue the product is a good as it's ever been. This leads me to believe that wine has an image problem. Our product is steeped in history and tradition, but could this be hindering our ability to connect with the younger generation? Our ability to adapt and engage future consumers may be the difference between a temporary downturn and a structural decline in the wine industry.



The humble cellar door

Gone are the days of the family dinner table. For hundreds of years, the dinner table served as wine's organic classroom. A safe place where wine was selected, discussed and shared among the family. In recent times, dinner culture has broken down with research suggesting that only 30 per cent of families eat dinner together regularly, a decrease of 33 per cent over the last three decades (American College of Pediatricians, 2021). What once was a place that nurtured learning and modelling wine consumption is now competing with TV screens and TikTok trends. Our youth have lost the familiarity of wine as a vehicle for family connection, the sense of ritual. As a result, they now view wine as intimidating, elitist and traditional. What the family dinner once represented was exposure to wine. A safe, non-threatening space to experience wine on a regular basis. Nobody wakes up one day and suddenly decides they are wine drinkers. Exposure over time is key to securing our future consumers.

Enter the humble cellar door. Despite the gloomy forecasts for wine sales, wine tourism is on a robust growth trajectory. The idea of sipping wines with friends among vineyards and unique culinary experiences is proving a hit, particularly with the younger generations. Research shows that both Millennials and Gen Z are spending more on experiences than material possessions with travel, entertainment and dining out making up a larger portion of their spend. Data from Mortimers Wines' cellar door supports this. While under 35s only make up 14 per cent of total spend, this demographic make up nearly 30 per cent of visitation. With this demographic tipped to represent 50 per cent of global spend in 15 years (Zhu, 2024), wine tourism appears to be the opportunity we have been yearning for to showcase our product to the next generations. Cellar doors may be the vehicle for the wine exposure lost at the family dinner table.

Terms of engagement

If we are going to engage new customers, we have to meet them on their terms. We can no longer rely on the production line of consumers that historic wine culture once created. The terms of engagement have changed. The smartphone revolution has shifted the way in which younger generations consume content and interact with brands. While this has created many challenges for our aging industry; it has also created opportunities or those willing to embrace it.

Social media has enabled producers to build communities around their brands and develop relationships at their cellar doors. The opportunity to engage with customers on a deeper level is proving to be an effective marketing strategy with studies suggesting younger generations are drawn to authenticity and storytelling. These consumers not only purchase the product, but over time they become ambassadors and advocates for the brand. There is a clear ambassador evolution process they move through:

- Discovery phase – customers engage with the product online or via cellar door
- Connection phase – customers develop a relationship with the brand
- Investment phase – customers purchase or share the product with peers
- Advocacy phase – customers become stakeholders by advocating for your brand to others.

When wine consumers engage deeply with a brand or label, their emotional investment transforms them from transactional buyers to stakeholders and ultimately into unofficial ambassadors, each with their own platform and influence. Peer to peer marketing is exponentially more trusted than traditional advertising and as the "social proof theory" suggests, we use each other's behaviour as a guide for our own. That's why we'd rather line up for a busy restaurant than visit the empty one next door. Focusing on direct-to-consumer connection also helps us break down the elitist and intimidating connotations that haunt the wine sector.

We need to entice consumers with open arms and embrace all who are curious, draw them in with a sip and watch them become enthralled by the world of wine. If the Instagrammability of our vineyards and cellar doors are our way to the younger generation's hearts (and pockets), we need to milk it, nurture it and, most importantly, invest in it.

The power of pop culture

Think pop culture doesn't matter? Just ask the Merlot producers of California. In the hit 2004 movie *Sideways*, Paul Giamatti's character "Miles" declares "If anyone orders Merlot I'm leaving, I'm not drinking any fucking Merlot!". In the years that followed, Merlot sales plummeted while Miles' preferred variety, Pinot Noir, saw a 16 per cent increase in demand – and this was before social media existed. Today's popular culture exerts a worldwide and instantaneous influence.

So, is it possible to harness popular culture to boost sales? Introducing "Split the G". For those who have been hiding under a rock, "Split the G" is the challenge of taking a few large gulps from a pint of Guinness, aiming to perfectly split the horizontal bar of the letter G on the glass with the remainder of the creamy stout beer. This may seem trivial, but the trend took off. With no marketing budget, sponsorship or paid promotion, "splitting the G" resulted in a surge of Guinness sales beyond belief. The phenomenon drove a 20.9 per cent increase in sales over recent years while the rest of the beer industry contracted at a yearly rate of 0.05 per cent (Towfighi, 2024). We are talking hundreds of millions of dollars in additional revenue from a TikTok trend.

What is even more staggering is its effect on the stout beer industry. For centuries, stout carried the stereotype of being an "old man's beer", but even Guinness' rivals are now seeing an explosion in sales. A beer once relegated to the dark corner of the pub now has prime tap real estate with young men and women - the fastest growing market. The same ingredients, the same pint, the same creamy foam lingering on the top lip. What this represents is exposure, nothing more, nothing less. It begs the question, what will wines' "Split the G" moment be?

Cultural crossroads

Wine stands at the crossroads of tradition and transformation. Change is needed but perhaps it's not the product that needs an overhaul. The key may be perception – how we invite people into the world of wine. That means shedding the elitest image step by step, brand by brand, sommelier by sommelier. Using inclusive, approachable language and letting authenticity shine through. Investing in regional wine tourism and educating our producers on the tools they can utilise to communicate their stories meaningfully. Creating valuable opportunities for exposure and converting customers into ambassadors of our industry. Success in the wine industry depends on shifting our reputation from demanding expertise to encouraging exploration among consumers.

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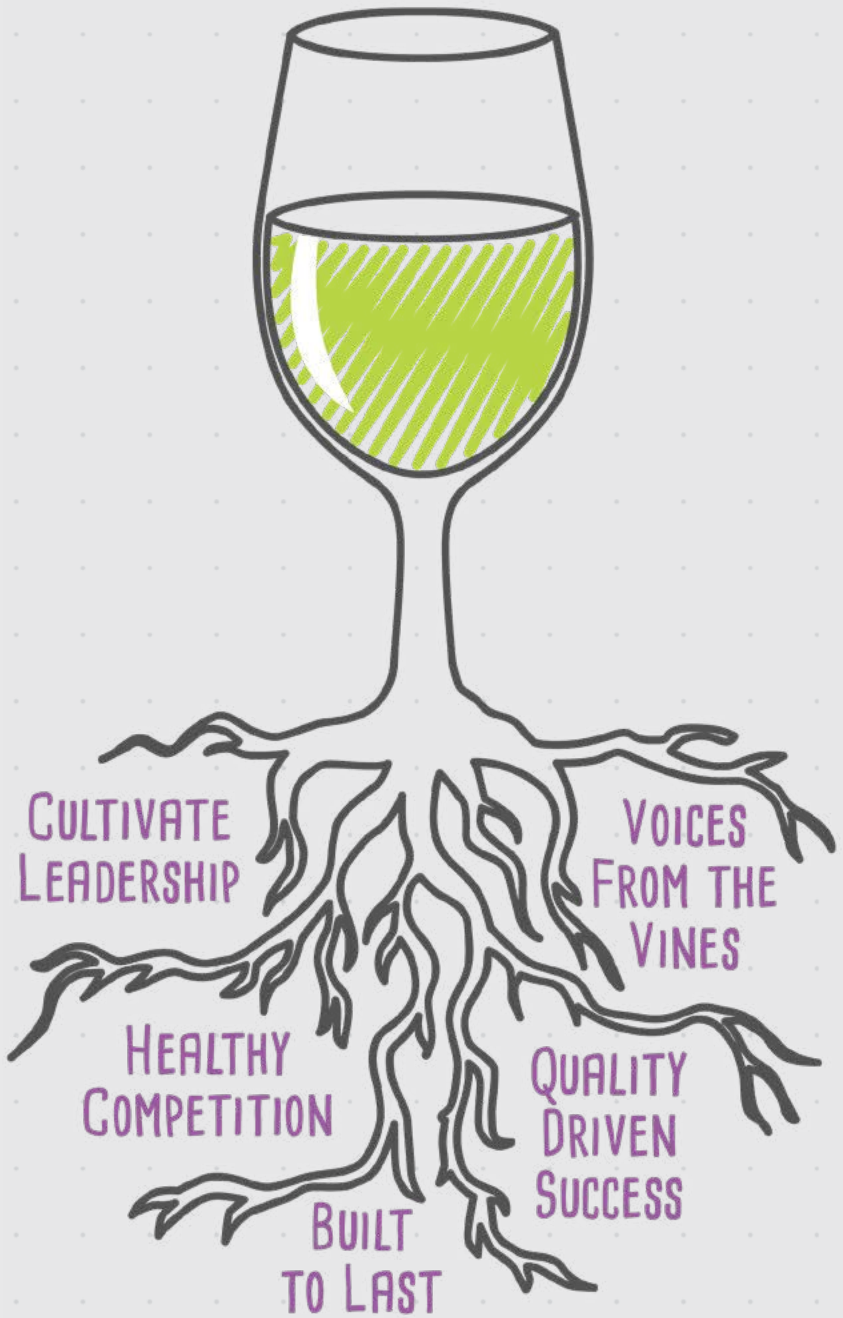
THE INVISIBLE ARCHITECT

by Matt Duggan



Businesses that genuinely and authentically champion viticulture are the ones that thrive. They create quality wines, credible stories and resilient industries. Those that marginalise viticulture and dismiss the voice of the vineyard inevitably fall by the wayside.

My career spans across the Tasman, and I've experienced a stark difference in the role viticulture plays. When I moved to Australia to step forward in my career, I instead felt as though I had stepped back in time.

Whether it was Australian Chardonnay in the 1990s or Marlborough Sauvignon Blanc more recently, the lesson is the same: when craft is sacrificed to corporatisation, the industry suffers. When viticulture is elevated, it flourishes.

I invite you to walk with me now. From my perspective as a proud viticulturist, I want to explore a new path forward – one built on courage, collaboration and the real magic behind our wines.

Voices from the vines: the cult of the cellar

Winemaking has always carried stardom, but I wasn't chasing that. After completing my Postgraduate Diploma in Viticulture and Oenology, I chose the vineyard and left most of my classmates to compete for the limelight. As my career progressed, I realised how deeply this perception runs: winemakers are the "celebrities" of our industry – and a genuine inequality exists.

This isn't about celebrity. It's about equal footing. If we want leaders to emerge from viticulture, we need to highlight the pathway and recognise it as a career that shapes the industry's future.

The "us and them" mentality between vineyard and winery teams is a damaging relic – not just for culture and morale, but for quality. The most successful companies don't have it. Instead, they build fully integrated teams where strategy flows both ways, with a focus on quality from vine to glass. And it shows – in the wine, on the bottom line, and in resilience to headwinds.

Cloudy Bay built its reputation on vineyard excellence. Henschke's custodianship of Hill of Grace created not just prestige, but legacy. Globally, estates like DRC in Burgundy and Vega Sicilia in Spain are revered as vineyard-first houses, where viticulture drives value.

The pattern is clear: companies that elevate viticulture don't just make better wine - they build resilience, reputation and value that lasts. These aren't accidents but the result of treating viticulture as a foundation, not a footnote.

The opposite is just as clear. When viticulture is marginalised, decisions are made "from the winery backwards" – or worse, by spreadsheets. The result is cookie-cutter farming, commoditisation and weaker wine. And weaker wine does not win markets. It doesn't cut through in a world where consumers are drinking less but demanding more. In times of shrinking demand, quality is the only competitive edge we have – and it starts in the vineyard.

That's why viticulturists must be at the table. We think in decades, not quarters. The decisions we make today shape the future of our regions for generations. That perspective is not just valuable – it is essential.

Healthy competition: lessons from young vit and sport

Competition, when done right, can be one of the most powerful catalysts for growth. It challenges us, stretches us and builds confidence through discomfort – much like sport does.

My involvement with New Zealand's Young Viticulturist of the Year competition is a perfect example. I competed five times. Each time, I was pushed out of my comfort zone, tested under pressure, and forced to develop technically, practically and personally. It quickly revealed my strengths and weaknesses – and gave me the motivation and structure to improve.

But YVOTY's real impact was far bigger than me. It shone a spotlight on viticulturists – not just as skilled practitioners, but as future leaders. It gave visibility, validation and opportunity. Its alumni now include a long list of senior industry figures across New Zealand and beyond – proof of the platform's power to accelerate leadership.

And like sport, it wasn't just about winning but about confidence, pride and camaraderie. It created a network that continues to support and lift each other up.

Australia has the talent. It has the need. And it can create something equally impactful – a uniquely Australian platform to push emerging vineyard talent to the next level.

Built to last: a warning from history

If there's one thing the wine industry is great at, it's having a short memory.

We've been here before. The rise and fall of Australian Chardonnay in the 1990s is well-documented: a global success story undone by the chase for volume over value. And in Marlborough, where I spent much of my career, I've watched the same story begin to unfold with Sauvignon Blanc. I remember a conversation with a respected viticulturist – recently inducted as a Fellow of the New Zealand Winegrowers Association – who warned we were heading down the same path back home. They were right.

Now, with excess supply and sluggish demand, we're at another tipping point. We've seen it before: prioritising scale over substance leads to commoditisation, discount bins and a race to the bottom.

Australia has a chance to lead by example – proving that our strength lies not in chasing volume, but in elevating viticulture and quality above all else.

Leading by example requires more than tightening supply – it requires changing who gets to tell our story. Too often, we let marketing spin fill the gap. Winemakers are given the microphone, while viticulturists – the people closest to the land – are sidelined. Grapes don't just arrive on a truck ready for transformation. They're grown with care, intent and passion. That is the story. The French call it terroir, and it includes the hand of man.

At the heart of that lesson is a truth we can't ignore: it all begins in the vineyard. If we want to lead and resonate with consumers, then authenticity – led by the people who grow the fruit – must be at the core of how we tell our story.

Quality-driven success: the power of authentic storytelling

Wine is a luxury product. And in a world where the modern consumer is watching their spending more closely than ever, it must offer more than just alcohol – it must offer meaning.

People want stories. They want a sense of place, a connection to something real. And yet too often, those stories are crafted in marketing departments or front-of-house scripts. The irony? The best stories already exist – in the vineyard, in the winery, in the people who live the process.

Viticulturists and winemakers are the custodians of these stories. We don't need slick taglines. We need honesty. Detail. Soul. That's what resonates. While winemakers have a huge role to play in this space, we need to hear from the vineyards too. When viticulturists tell these stories, they don't just add flavour – they anchor the industry's credibility.

We need to give consumers a reason to spend, not just a reason to buy on discount.

Cultivate leadership: a new model of leadership

For too long, leadership in wine has been synonymous with titles, budgets and boardroom roles. But real leadership – the kind that moves the needle – often starts with the people who are closest to the product and hold the primary production roles.

Viticulturists are well-positioned to lead, but the system doesn't always allow it. The growing weight of compliance, reporting and corporatised processes can smother initiative and drown out creativity. We layer systems on top of systems and then wonder why people feel disengaged from the work.

We need a new model. One that is pragmatic. One that values clarity over clutter. One that re-centres the vine and the wine. One that trusts technical experts to lead, not just execute.

In uncertain times, the best response is courage, not caution. As Ranjay Gulati argues in *Harvard Business Review*, "fortune favours the brave, not the cautious". Companies that retreat into comfort zones rarely thrive. But viticulturists – with their grounded, long-term perspective – can be the courageous leaders our industry needs to move forward.

This starts with structure: streamlined communication, less duplication and more decision-making power at the operational level. But it also requires cultural change – a shift in how we see leadership itself. It's not about hierarchy. It's about impact.

The challenge

So, here's the challenge.

To winemakers, executives and the broader industry: share the stage. Bring viticulture into the spotlight. Strip away unnecessary complexity and trust your experts to lead with clarity and intent.

To viticulturists: step forward. Be visible. Tell the stories. Use your technical excellence and grounded perspective to shape not just vineyards, but businesses and the industry we share.

And to the industry at large: In a world of shrinking demand, weaker wine offers no competitive advantage. Our only defence – and our greatest opportunity – is to lead with quality, and that begins in the vineyard.

Australia now has the chance to show the world that strength lies not in chasing volume, but in championing viticulture and quality above all else. That is how we secure our future: by learning from the past and lighting the way forward with resilience, excellence and authenticity.

This is the path I invite us to walk: one that places viticulture at the centre, as a career that drives leadership, innovation and pride. We need platforms that lift viticulturists up, just as the Young Viticulturist of the Year competition has done in New Zealand, accelerating careers and building leaders. A platform like that, one that pushes people out of their comfort zone and develops the next generation of talent, has a place here, too.

It's time to plant that seed and grow the future of our industry. Because the real leaders in wine are those who think in decades, not quarters. And it's that long view – grounded in viticulture – that will define our strength for generations to come.

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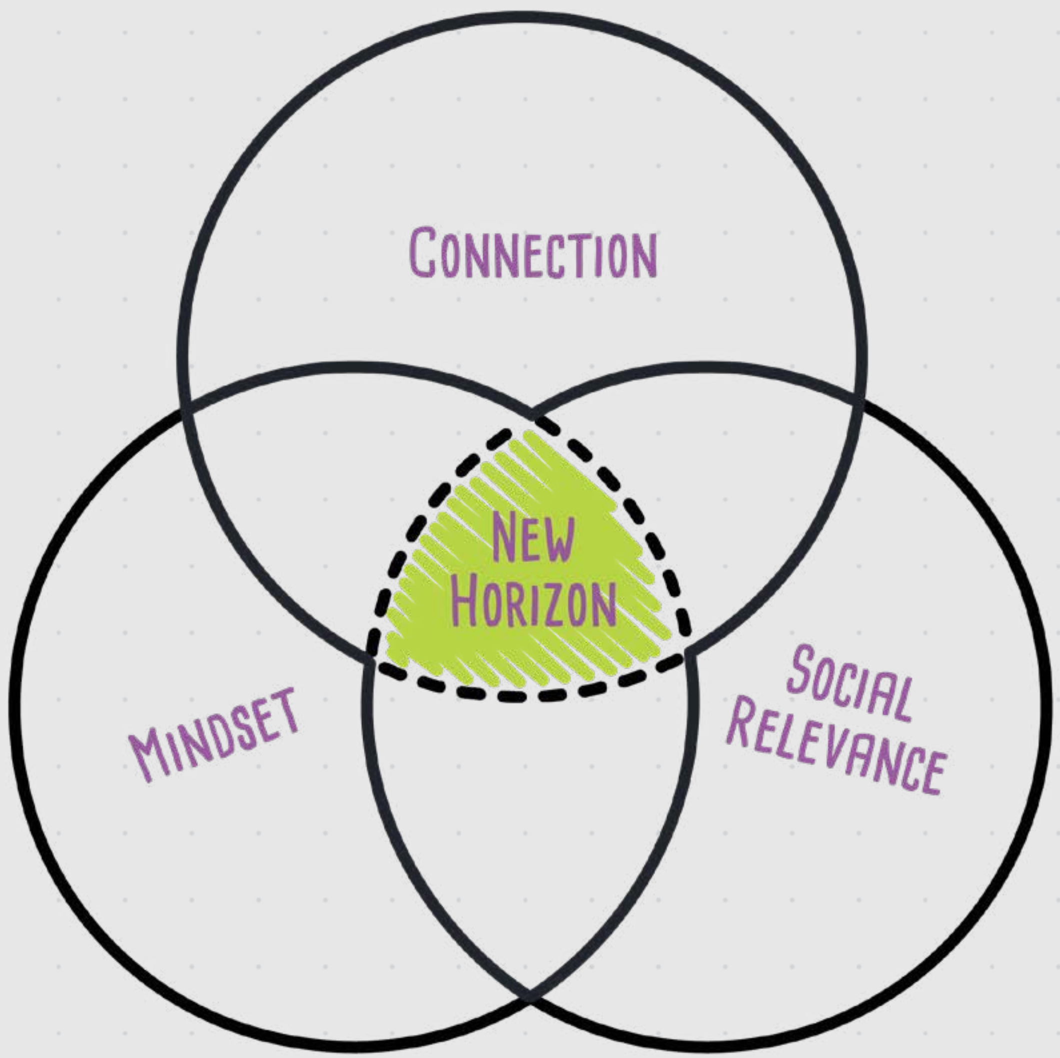
THE RELEVANCE RESET

Crafting wine's New Horizon

by Marianne Duluk



HOME

Steve Jobs once said, "Create relevance, not awareness". Relevance remains one of the wine sector's biggest challenges. In a rapidly moving beverage market, shifts in consumer preferences and evolving lifestyles are forcing the wine sector to ask some hard questions: Who is wine for? How does it fit? And how does it connect with a younger generation? The opportunity isn't to look back – it's to chase a "New Horizon": the next chapter where wine meets people on their terms.

Global consumer trends are moving fast. According to the International Wine and Spirit Record (IWSR, 2024), while younger drinkers are still entering the wine category, they're consuming it less often. Gen Z, with their moderation mindset and flavour-forward curiosity, are opting out of traditional wine-drinking occasions – think less around the dinner table and more on-the-go and at casual social events.

Competition isn't just coming from within wine. The new wave of beverages – seltzers, botanical spritzers and functional drinks laced with nootropics and probiotics – is nibbling away at wine's market share with their refreshing flavour cues and health-halo branding. Wine, in contrast, is no longer the coolest kid on the block or the most relevant. Domestic consumption of Australian wine has declined by nine per cent over the last seven years, at a faster rate than other alcoholic beverages (Wine Australia, Market Bulletin, 2024). Its confidence is wobbly.

But all is not lost. In fact, we have a pink-hued case study that shows what's possible when wine ditches convention and elitism and leans into a consumer-centric approach. Enter Rosé: the comeback queen of the wine world.

The wave of change

Remember when Rosé was a bit of a joke? Too sweet, too dark, too… uncool. Think Mateus vibes at the back of your aunt's fridge. It was the wine that no one took seriously - particularly winemakers - and it was often the byproduct of surplus grapes. It was a very minor part of the Australian wine category, lacking identity and a clear purpose.

Then, something wild happened. Around 10 to 15 years ago, Rosé's style went drier, lighter, fresher – and infinitely more sophisticated. And people leaned in. Big time.

As with many trends, the ripple effect began offshore. In the United Kingdom and Europe circa 2016, sales of Rosé wine doubled (Drinks Business, 2017), led by the chic, pale salmon-coloured wines of Provence. These wines weren't weighed down by complex terminology – they were light, stylish and food-friendly. Most importantly, they felt accessible. And aspirational. They became relevant.

Back in Australia, the reaction was initially slow. I saw it firsthand. While working at a winery, I pitched a Rosé new product development (NPD) concept. It got knocked back. Then again. And again. It wasn't until the category exploded globally that mindsets started to shift. Gradually, local producers stopped seeing Rosé as an afterthought and started seeing it as a canvas for fun yet premium expression. The wines went dry, dark shades gave way to pretty salmon hues, and packaging finally said, "Hey there, drink me."

Rosé pioneers De Bortoli launched their La Bohème Rosé – a dry, pale style – ahead of the curve in Australia in 2010, following a trip to the South of France where everyone was drinking Provence Rosé. "We reflected on the Australian climate and how suited this exact style of wine is, so why weren't we making it, and people drinking it?" says Leanne De Bortoli. "There was initial resistance from our sales team back then because there wasn't any data to suggest acceptance; however, being in a clear bottle, thus emphasising the pale pink colour and food-friendly nature, was very appealing to consumers."

De Bortoli's Rosé wines have been leaders in the category for well over a decade. Since 2014, the Rosé category nationally has grown faster than Shiraz and Pinot Noir, peaking in 2018 with exceptional growth of 80 per cent – around the time wine globally began declining (Circana, 2025).

While growth has softened since its peak, the Rosé category has consistently grown in value since 2014 and has surpassed Pinot Noir in total red wine share, currently growing at 7.1 per cent to July 2025 (Circana, 2025). In a declining global wine market and amid the rise of alternative beverages and wellness trends, Rosé did the unthinkable: it broke the mould. It didn't just change its flavour profile – it changed the way wine could show up in the world.

Mindset change: packaging that says "drink me"

One of Rosé's biggest strategic wins? It rewrote the typical packaging model. Instead of leaning on traditional and conservative wine cues, it went visual. It let the packaging do the talking. Rosé wines presented pastel tones, cool designs and back-label copy that was playful rather than technical.

Gone were the scripted fonts and earnest tasting notes – and there was no mention of maceration or pH levels here. Instead, Rosé labels started to focus on everyday, real moments – sunny afternoons, tasty snacks, laughs with friends. And that shift worked. Demystifying the category so that people can shop with their eyes is key, and today's Rosé drinker shops the category largely based on wine colour and packaging. The message is clear: this is wine for now, not your cellar – and within the Endeavour Drinks Group, Rosé has outpaced white wine growth every year since 2014 (Basket Sales Data, 2025).

Marketing that connected with community

Rosé didn't just update its wardrobe – it updated its social connection and currency. Its marketing and communications became about lifestyle, not legacy.

Around 10 years ago, Instagram was the new digital frontier – and Rosé was ready. Hashtags like #YesWayRosé, #RoséAllDay and #RoseRevolution went viral overnight. Wine marketing campaigns leaned into aspirational but relevant storytelling with broad appeal across demographics (yes, real men drink pink), occasions and price points. Rosé wasn't asking to be understood; it just needed to be enjoyed.

Events followed suit: Rosé picnics, rooftop parties, DJ sets, and fun food pairings. Even big brands got it right – Jacob's Creek's Le Petité Rosé pop-up at the Australian Open remains one of the best wine activations I've seen. No white tablecloths, no gatekeeping. Just colour, connection and vibes.

The socially relevant playbook

What can the rest of the wine world learn from Rosé's meteoric rise? Plenty.

Rosé redefined traditional wine marketing by rejecting technical jargon, points and pomp, which ostracise genuine consumer connection. This consumer-centric approach feels natural for newer categories like spritzers and flavoured wines, but it can just as easily apply to "standard" varietals.

Take Riesling as an example. It's fresh, vibrant and incredibly versatile but still feels intimidating to many. Light reds are picnic-perfect but often marketed too seriously. Even Mediterranean whites like Fiano can feel too formal, stuck behind history and dubbed "alternative" instead of simply refreshing and bright.

To reimagine other wine categories through the Rosé lens is to apply the socially relevant playbook: shift the mindset, build relevance, create accessibility and deepen connection.

1.Ditch the intimidation factor.

It's 2025 and the wine category is still confusing for many. While many wineries are great at connecting with their community, there are too many options, too much jargon, and labels that don't make it easy to choose. And just between us, I would argue that wine still has a bit of a personality problem ("What, you can't taste the forest floor notes?"). Urgh, we need to stop that and stop talking to ourselves as an industry. Rosé succeeded because it embraced clarity and simplicity without worrying about the "right" wine terms, which is hugely intimidating for people of all ages.

2. Make lifestyle the hero.

Not every wine needs to be framed as a collector's item. While there is a time and place for luxury and provenance, for most people, wine is about everyday moments – couch hangs, BBQs and Friday knockoffs. Lean into that. Rosé proved that people don't always want to study their wine; they just want to enjoy it. Understand how, where and when wine fits into the everyday lives of your community – it might be different from what you think.

3. Speak like a human, not a sommelier.

Honestly, can we please retire the word "lanolin"? Has anyone licked sheep's wool lately? I didn't think so. Apart from a small percentage of the population, most people don't understand wine phrases like cold stabilisation and phenolic grip. When we focus on the technical notes, we pile on the intimidation factor (see point 1). People want to know: Is it dry or sweet? Is it tasty? Will it go with my sushi? Focus on language that feels relatable to your community.

4. Don't be afraid to break tradition.

Rosé proved that dropping traditional wine cues can still earn consumer trust – as long as the wine delivers on flavour. Wine marketing has largely been a safe and traditional space, but it doesn't need to be. Stop copying every other winery with yet another "barrel and boots" creative. How do you expect to stand out if your marketing looks like every other brand? Stand for something, challenge predictable scripts, and embrace creative freedom. Rosé proved the playbook works. The question is: Who's next?

The New Horizon

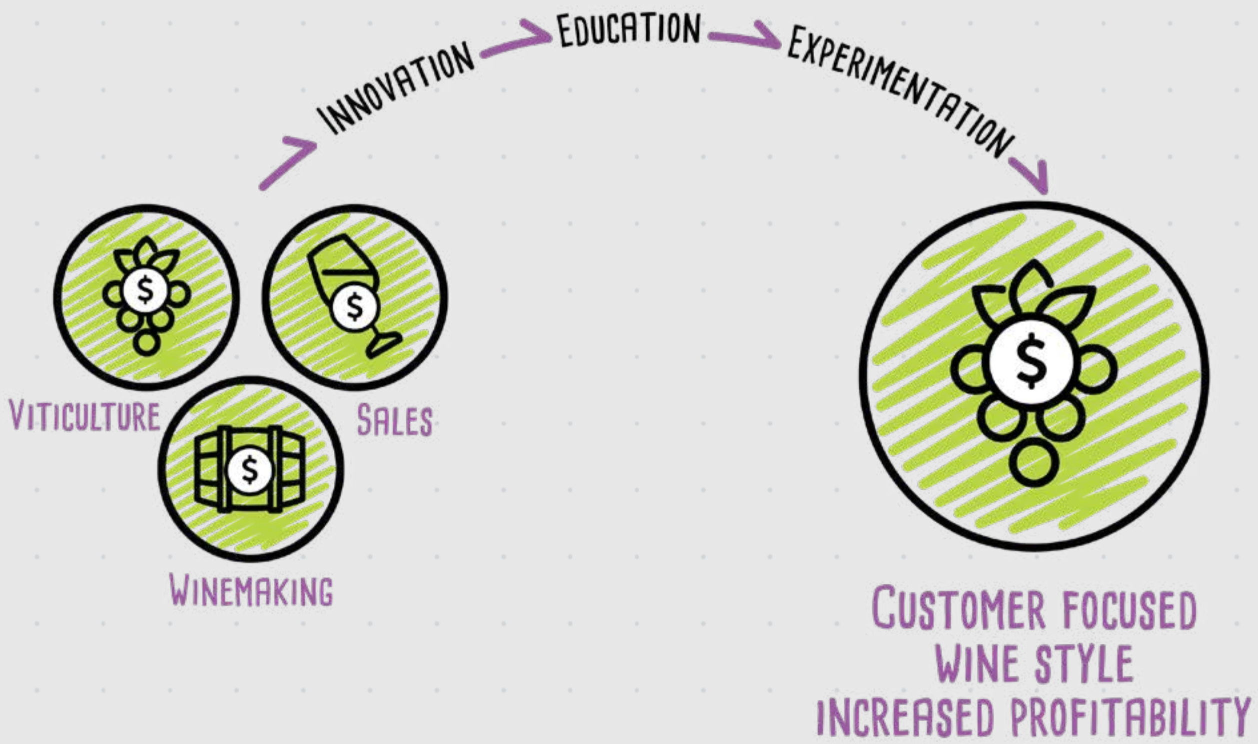
The New Horizon demands courage. It asks us to face an uncomfortable truth: wine is losing social relevance, and without action, it risks fading from the cultural conversation. The way forward is clear: we need to embrace change with a new mindset, commit to making wine relevant in people's everyday lives and prioritise connection over complexity. These pillars are not optional; they are the foundation of wine's future.

If we embrace them with urgency and imagination, wine won't just survive – it will thrive, reclaiming its place at the table and shaping the New Horizon we crave.

BRIDGING THE GAP

Aligning viticulture, winemaking and sales to drive change

By Chris Mein



The wine sector is a customer-focused business. If the products we offer do not align with customer expectations, they will choose to spend their money elsewhere, leaving us with warehouses full of unwanted bottles and abandoned vineyards.

A strong domestic market for wine that aligns with wine consumers and their taste preferences is crucial for the long-term profitability of Australian wine. The reality is that many established wine markets, including Australia, have seen a steady decline in wine consumption, down seven per cent over the past five years (Australian Grape & Wine, State of the Market Report 2025). We could easily blame declining consumption on factors out of our control, or we can acknowledge that a contributing factor to this trend is the wine sector's reluctance and, in some cases, outright failure to evolve wine styles in line with shifting consumer tastes. The style evolution is not about abandoning traditions but renewing relevance.

One of the most critical and often overlooked barriers to stylistic evolution in wine lies in the lack of alignment between the viticulture, winemaking and sales teams.

We have taken the customer for granted for too long, flooding the market with non-descript wines that lack flavour identity and authenticity. To reengage with customers, vineyards need to be farmed better, in conjunction with winemakers who must better understand the site and the style of wine the customer is seeking. Sales teams also need to understand the stories behind the vineyards and the winemaking to sell the authenticity that modern consumers demand. Increasing collaboration between these areas will set Australian wine businesses up for continued long-term success.

From the ground up

I believe there are opportunities for our sector to thrive if the gap between the vineyard, the maker and the seller is closed.

In the nearly twenty years that I have worked in vineyards, I have seen firsthand how this misalignment plays out in the field. In the worst cases, winemakers arrive at the vineyard unsure of the style of wine they intend to make. The grower, uncertain of what is expected of them, simply produces fruit that is picked at a nominal Baume, favouring alcohol content over the expression of site, season or variety. The resultant wines often do not tell the story of the vineyard, vintage or variety, and deliver a poorer customer experience, leaving the sales team with no authentic story to communicate to the customer.

Conversely, in scenarios where I have worked with winemakers who have a clear vision of the style of wine they want to make, possess a strong understanding of their customers' expectations, and engage with viticulturists to better understand how a variety is expressed from their site, the result has been wines that are highly sought after in the market, with a compelling story to help drive sales.

While there are scenarios where viticulturists, winemakers and sales teams do work together, the engagement is usually transactional, missing the depth of collaboration required to drive real change. In many cases, it also occurs too late, leaving little opportunity to be intentional about the fruit that is grown. By taking a deeper, collaborative approach to the final product, vineyards can be managed in a more impactful and fit-for-purpose manner.

> *If the **grower** is aware of the final wine style, its place in the market and the story being told to customers, they can evolve and adapt their practices to build quality and efficiency in the vineyard and ultimately some profitability.*

When fruit is delivered to the winery in line with the final wine style expectations, **winemakers** can be clear on their production process, building greater efficiency and profitability into the wine as it reaches the market.

When the **sales team** is fully informed about the growing and winemaking, they can tell a genuine, authentic and engaging story to customers, improving sales and supporting the economic sustainability of the wine sector.

This collaborative approach ensures that stylistic decisions are not made in isolation but are well thought out, planned for from the start and adapted throughout the process.

Collaboration: the key to change

Adapting wine styles to meet consumer tastes is a leadership challenge. It requires vision, courage and a willingness to challenge tradition. The wine sector is an ecosystem that thrives when all parts work together for a common goal; to this end, leadership must be multi-dimensional. It needs to combine strategic foresight and market awareness, and nurture a culture of collaboration within businesses.

Wine business leaders must prioritise consumer insights in decision-making. This means regularly engaging with market data, such as the Wine Australia market insights dashboards and bulletins, conducting tastings and feedback sessions with trade and customers, and investing in research and development that aligns with these lifestyle shifts. As an example, Wine Australia's production, sales and inventory report 2023–24 (Wine Australia 2024) showed that 66 per cent of regular wine drinkers preferred lighter, more refreshing styles of wine, while an International Wine & Spirits Research (IWSR) report (IWSR, 2023) found that 75 per cent of wine drinkers globally cited taste profile as the most important purchase factor, with a shift towards fruit-forward, less oaky and easy-drinking styles. A failure to use this data effectively exposes many businesses to lost profitability and risks further misalignment between wine producers and their customers. Viticulturists and winemakers need to use this data to act confidently and drive stylistic, customer-focused change.

Sharing our knowledge

Changing wine styles requires bringing loyal consumers on the journey. This means educating the market about why changes are being made, reframing quality in terms that resonate with modern consumers, and telling stories that connect emotionally. For example, 72 per cent of Millennial wine drinkers globally said they trust wine more if they understand why it tastes the way it does and how it fits their lifestyle. Collaborating across all sections of production can help here. Viticulturists have a unique role to play in customer education, as they often understand how climate and cultural practices impact the wine. In my experience, customers are more engaged when they hear this directly from the person on the ground rather than through a rehearsed script from a wine rep. However, viticulturists are often overlooked for tastings and events; this is a missed opportunity to increase collaboration and customer engagement.

When viticulturists and sales teams are in constant conversation and collaboration, these stories come to life for customers.

> *Evidence shows that when the quality of a wine is reframed around freshness, lower alcohol or sustainable growing practices, wineries achieve higher conversion rates among younger consumers (IWSR, 2023). Bringing customers along with the evolution of wine style with thoughtful education and storytelling will allow wineries to better navigate changes while minimising the risk of alienating their traditional customer base.*

Innovation vintage after vintage

Each season allows for new ideas and innovations to be implemented in the vineyard and the winery; lessons learnt from the previous season help shape the decisions for the coming vintage. Viticulturists and winemakers must always think of continuous improvement and adopt new ideas and technologies to improve efficiency and wine quality. Innovation is not just about large capital expenses; it also involves recognising changes to cultural practices that can improve fruit quality and help deliver a more consumer-driven style from vineyard to glass. Trialling Kaolin clays to limit sunburn on fruit or improving pruning practices to create better vine balance are just some examples that can be implemented. Resistance to change and innovation is far riskier and more likely to cause higher levels of business and financial stress than lacking the leadership skills to embrace a culture of experimentation.

Conclusion

As the wine sector faces shifting consumer preferences, increased competition from other beverages and pressure to stay relevant in modern lifestyles, leadership must drive change in what we make and how we think and collaborate. The shift towards lighter, more approachable styles and value-driven storytelling is already happening, but not evenly. The competitive edge now belongs to those willing to collaborate, share and innovate. This starts with a stronger connection and dialogue between viticulturalists, winemakers and sales teams.

The decline in wine consumption is not inevitable; it is symptomatic of a broader disconnect between plant, product and people. Only by aligning viticulturists, winemakers and sales teams will we create wine styles that match evolving consumer tastes, and we can hope to reverse the consumption decline and secure a vibrant future for Australian wine.

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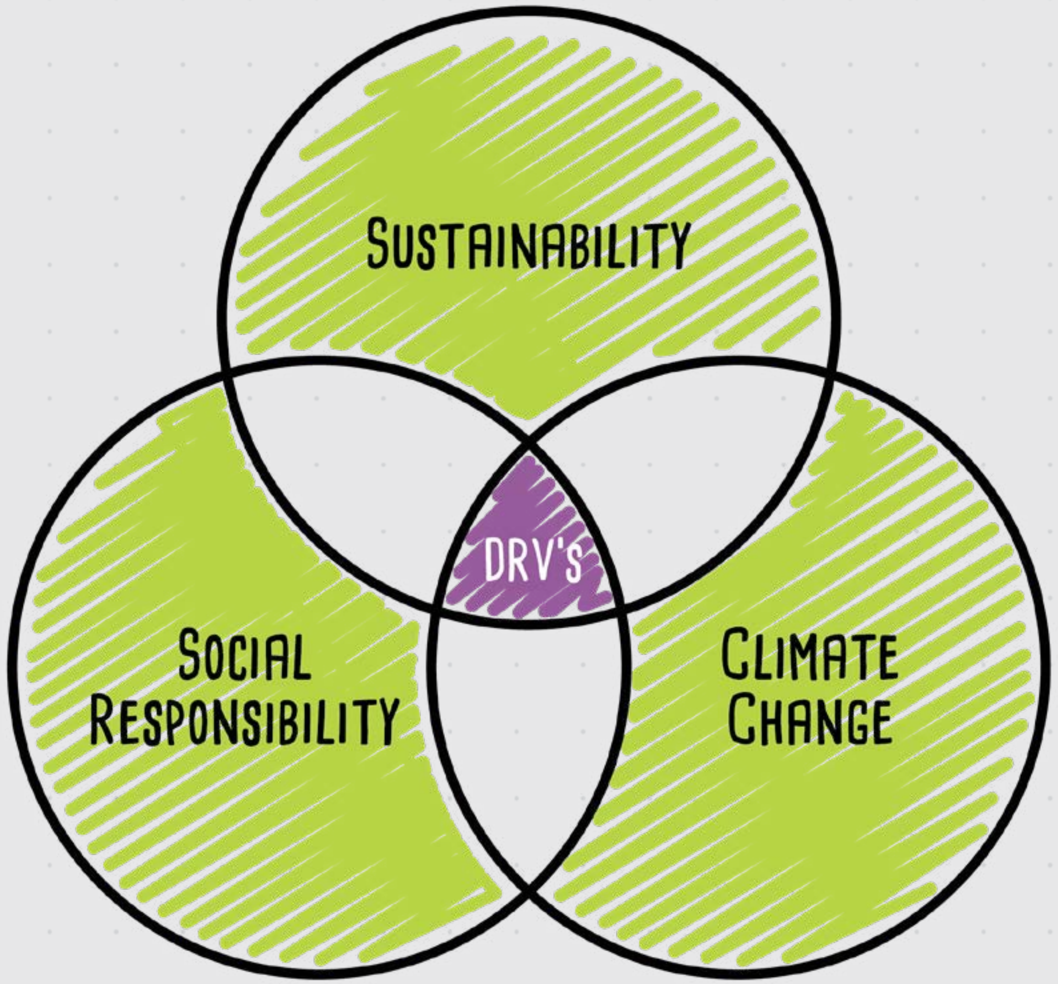
SUSTAINABILITY AND RESPONSIBILITY

THE VINE INTERVENTION

Hybrids for a resilient wine future

by Andi Roberts-Davison



A vine intervention may be exactly what the Australian wine sector needs – a shift toward hybrid varieties that promise a more resilient future for wine.

The overarching message from the 19th Australian Wine Industry Technical Conference in 2025 was one of hope. Yes, the wine industry may have never seen such vulnerability, but neither has it been quite so innovative. Alongside the challenges of rising temperatures, consumer trends and mildew pressure, a quiet revolution has been gaining traction. One that could have a hand in meeting all these challenges. Could disease-resistant hybrid vines be the solution – the paradigm shift – that we didn't know we needed?

The hybrid revolution

Disease-resistant hybrid vines are not new. The technology and knowledge to produce crossbred and backcrossed disease-resistant vines have existed for more than a century, first emerging in response to the devastating Phylloxera outbreaks of the 1860s (see Figure 1). In recent decades, much attention has been paid to disease-resistant American rootstocks grafted with V. vinifera scions. By contrast, hybrids between V. vinifera and North American species (e.g. V. riparia, V. labrusca and V. rupestris), often marked by foxy aromatics, high acidity and low tannins, have been less accepted – even banned in some European countries.

From the middle of the 20th century, backcrossing hybrids were recognised as a way to reduce less desirable characteristics. PIWI (Pilzwiderstandsfähige Rebsorten – fungus-resistant) varieties such as Regent, Solaris and Floreal have been commercially available for decades. However, it wasn't until the genomic "gold rush" of the 1990s that developments in this field really accelerated. Specific genes for disease resistance – quantitative trait loci (QTLs) – could now be identified, and polymerase chain reaction (PCR) could be used to screen backcross progeny that still possessed these genes. Breeding programs in Europe began using this technology immediately, with the first commercial plantings of disease-resistant varieties (DRVs) appearing in Germany, Switzerland and Italy at the turn of the century. CSIRO has produced commercially available hybrid vines (e.g. Tarrango) since the 1980s but shifted its focus to DRVs shortly after 2000 (J. White, personal communication, 2025).

The trifecta

1. Spray less, save more: sustainability benefits

Since the latter half of the 19th century, powdery and downy mildew have posed relentless challenges to grape growers. Unlike their relatives in the US, *Vitis vinifera* has no resistant genes to these pathogens. Resistant American, and more recently discovered Chinese, Vitis species can still get infected, but they have genes that are upregulated upon infection and block the course of the disease (J. White, personal communication, 2025). Both pathogens attack the green tissues of the vine. According to Sambucci et al. (2019), powdery mildew is responsible for the greatest financial losses to the worldwide grape and wine industry, and with combined annual losses of around $140 million, powdery and downy mildew are the most economically important diseases in Australia (CSIRO, 2025a).

The most common weapon in a grape grower's arsenal (both organic and conventional) for over 20 years is under fire. Copper is a heavy metal that has been shown to accumulate in agricultural soils and groundwater, especially in vineyards (Ballabio et al., 2018). The associated ecotoxicity is heavily dependent on the dose rate (kg/ha/year), accumulation (kg/ha) and other parameters like soil pH, but includes a significant reduction in microbial activity and earthworm biomass, as well as reducing grapevine growth (Karimi et al., 2021; Romanazzi et al., 2016). Excess copper consumption in humans can lead to hepatitis, neurological disorders and dementia (Wang et al., 2023). On top of this, bacterial pathogens like *Pseudomonas syringae pv. syringae* are starting to show levels of resistance (Aprile et al., 2021).

The EU has restricted copper use to 6 kg/ha/year since 2002, and similar restrictions exist for organic viticulture in Australia. Despite this, copper levels in soils in Australian vineyards can be significantly higher than the threshold for a recommended environmental investigation (60 mg/kg) (Pietrzak & McPhail, 2004). The search for alternatives has been thorough, but copper sprays (along with sulphur sprays favoured for powdery mildew) remain a popular choice.

Although DRVs reduce infection risk, strategic fungicide applications remain necessary to preserve the durability of resistance and control other pathogens not covered by it. However, their use has the potential to reduce spray regimen to just 2–3 per year (50–80 per cent reduction), applied pre- and post-flowering, for example (Molitor et al., 2025; J. White, personal communication, 2025). Not only would this significantly reduce copper use and improve soil biology, but it would also save time and money, lower the carbon footprint and prevent soil compaction. For organic and biodynamic farmers, for whom, arguably, copper use no longer aligns with their principles, could this be the breakthrough they have been waiting for?

2. Climate change resilience

One of the most compelling attributes of disease-resistant hybrid grapevines is their climate resilience; a trait increasingly vital as vintages face heatwaves, droughts and shifting seasons.

CSIRO's newest breeding efforts merge the drought-tolerant genetics of heritage Coonawarra and Barossa Valley Cabernet Sauvignon with modern mildew-resistant traits (downy and powdery) developed through selective breeding. Recently planted at Wynns Coonawarra Estate as part of a Wine Australia–backed project, these hybrids demonstrate climate resilience and disease resistance designed for hot, dry Australian conditions. The initiative aims to produce vines capable of thriving under extreme heat and water stress while dramatically reducing spray requirements, creating a model for sustainable viticulture in a warming future (CSIRO, 2025b). Some hybrid varieties, like CSIRO's *Cienna* and *Rubienne*, have also been shown to retain acidity under hot weather conditions (CSIRO, n.d.-a).

Hybrid varieties, especially some PIWIs, can reach phenological milestones earlier than traditional *V. vinifera*. This early ripening can be a strategic advantage in cooler regions, higher elevations, or areas with abbreviated growing seasons. Tools like UniPhen "PIWI" modelling demonstrate how selecting early ripening PIWIs, such as Solaris, can align with modern ripening calendars affected by climate change. Could this be the answer for growers aiming to avoid harvest overlaps or late-season heat stress (Molitor et al., 2025)?

3. Hybrids and the rise of low alcohol wines

DRVs are becoming available in Australia from a range of sources. Yalumba has imported selections from the INRAE-ResDur project in France, and Chalmers has focused on the Italian variants from

VCR (Vivai Cooperativi Rauscedo). A deep dive into the advertised oenological potential of hybrids often includes promises of acid retention at high growing temperatures, and in the case of the CSIRO's Mystique, high colour concentration at moderate sugar levels and suitability to produce wine with a lower alcohol content (CSIRO, n.d.-b).

Monak Wine Co. in Sunraysia has worked with disease-resistant hybrids for a few years. Winemaker Cindy Healy has been impressed with how early the flavour develops in one of her white hybrids, which has won several awards. They have managed to make a full-flavoured (Riesling-style) dry wine at under nine per cent ABV, and they never have to add acid to their wines (personal communication).

There are a few articles linking the use of hybrids to the rapidly evolving consumer appetite for lower alcohol wines. However, if the observations of some trail-blazing winemakers are true, could they offer a new "minimal intervention" approach to lower alcohol wines?

Barriers to adoption

If disease-resistant hybrid vines have been available and grown for decades, and their effectiveness in resisting disease and improving sustainability only improves with each new iteration, what are the barriers to their uptake?

After decades of restrictions on the varietals permitted for Protected Designation of Origin (PDO) wine, EU reforms in 2021 granted permission to use resistant varieties, although integration still requires approval from member states and local authorities. Outside Europe, marketing restrictions and a lack of recognition from export markets have slowed uptake. Confusion also persists around what constitutes a GMO vine, underscoring the need for education to ensure consumers recognise that DRVs are not classified as GMOs (see Figure 2 for a diagram of how they are produced).

Market perception remains a major hurdle. Education in the wine sector remains focused on the elite *vinifera* varietals, with meagre mention of hybrids, so it is no wonder that there is little trickle-down information from sommeliers and critics to consumers. Overcoming entrenched preferences for *Vitis vinifera* will require education, storytelling and examples of exceptional wines made from hybrids. While we are focusing on what these brave new wines lack compared to their ancient counterparts, could we be missing the opportunity to celebrate their differences, especially their sustainability, to younger consumers with an appetite for social responsibility and wine adventure?

The future

The new wave of multi-resistant hybrid grapevines arriving in Australia could be the game-changer the wine industry needs, tackling the trifecta of sustainability, climate resilience and maybe even socially responsible lower-alcohol wines. While much of the world remains constrained by tradition, entrenched in regulations and slow market acceptance, Australia stands apart. With minimal varietal restrictions, an ingrained culture of innovation, and some of the most talented and curious winemakers on the planet, we have a rare opportunity to lead. By embracing these varieties, Australian producers could create high-quality, distinctive wines that meet environmental targets, thrive under changing climates and appeal to evolving consumer tastes. As we heard loud and clear at AWITC 19, the answers to some of our greatest challenges may already be in our hands; it's now up to Australia to plant them, nurture them, market them, build compelling stories about them and lead the world into the next chapter of wine.

Figure 1: Timeline of key historical events leading to the development of hybrids, resistant to multiple diseases (Eibach et al., 2007; Reisch et al., 2012; J. White, personal communication, 2025).

Figure 2: Four techniques for selective plant breeding. Adapted from White (2025). Clockwise from top left: DRVs are produced through crossbreeding, a process accelerated in recent years by the discovery of QTLs. Donor vines with resistance QTLs for powdery and downy mildew are crossed with "elite" vinifera species. Progeny carrying the QTLs are then backcrossed with the elite species multiple times to remove undesirable donor vine traits – such as foxy aroma. These are not considered to be GMOs. Mutation breeding involves applying a stressor to the plant meristem and screening for successful mutations. They are also not considered to be GMOs. However, transgenic breeding and genomic editing are classified as GMOs in Australia and New Zealand.

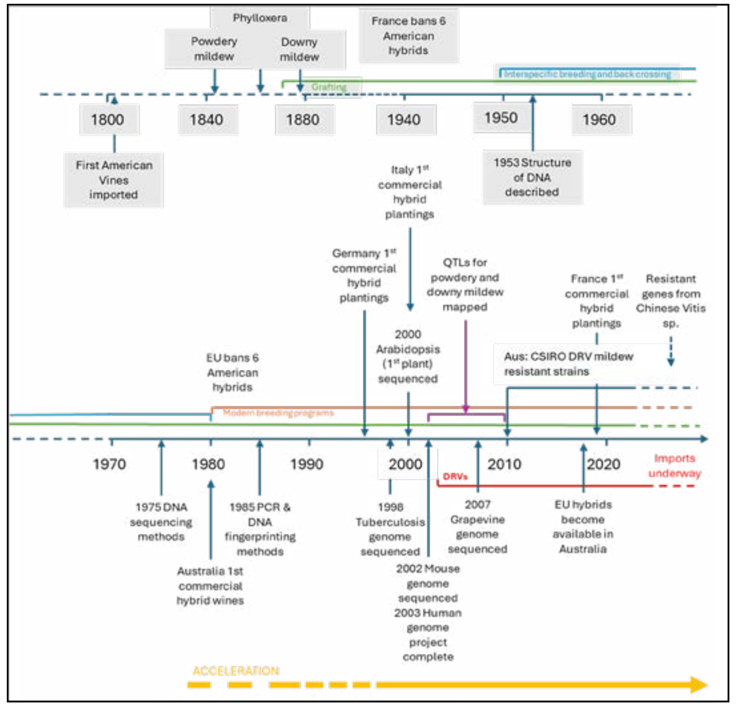


Figure 1

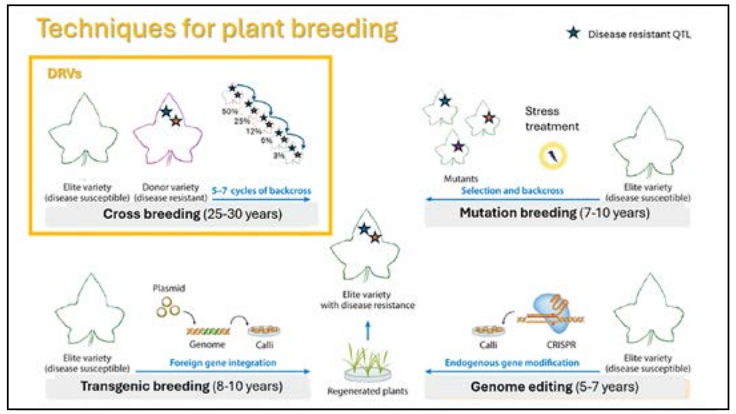


Figure 2

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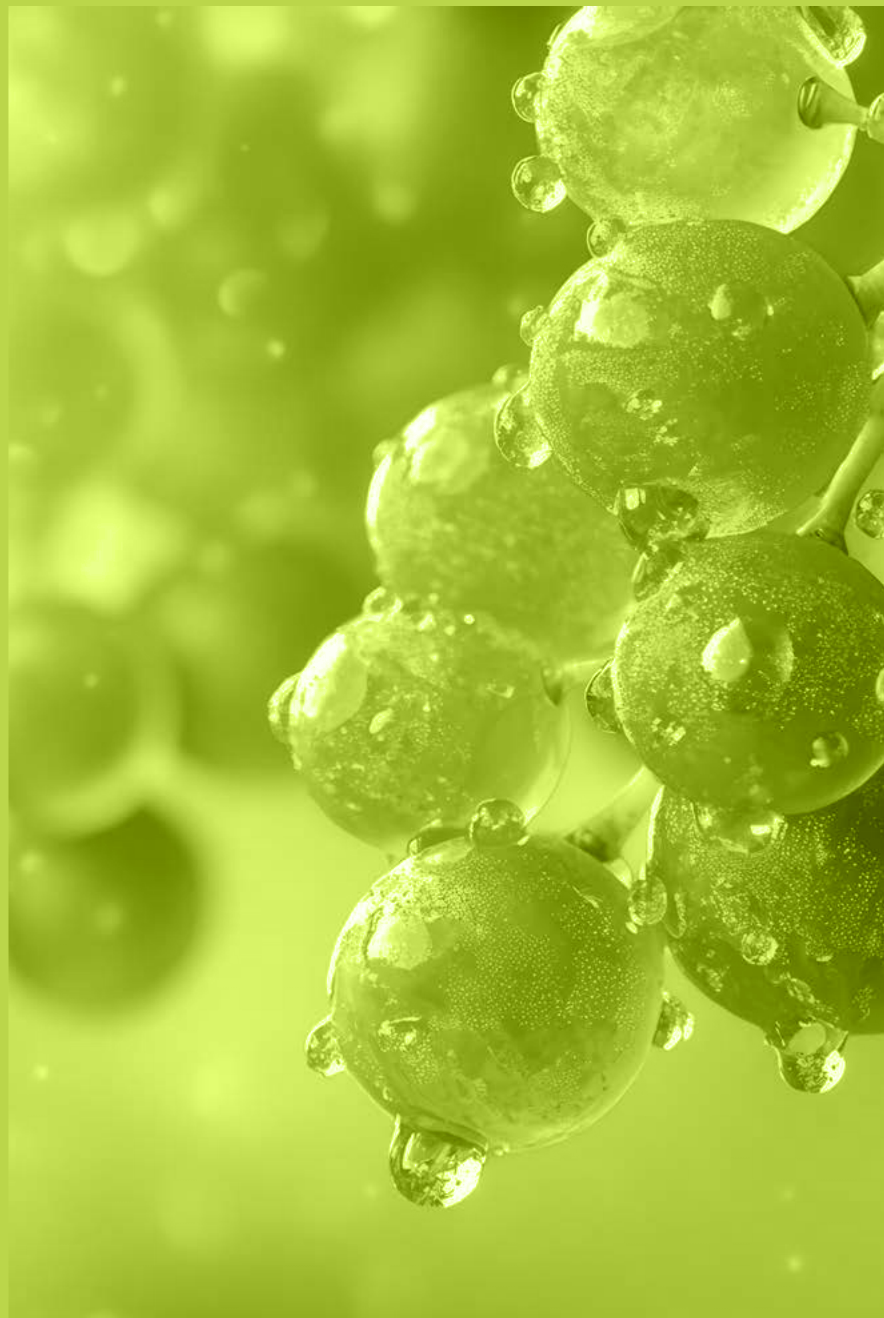
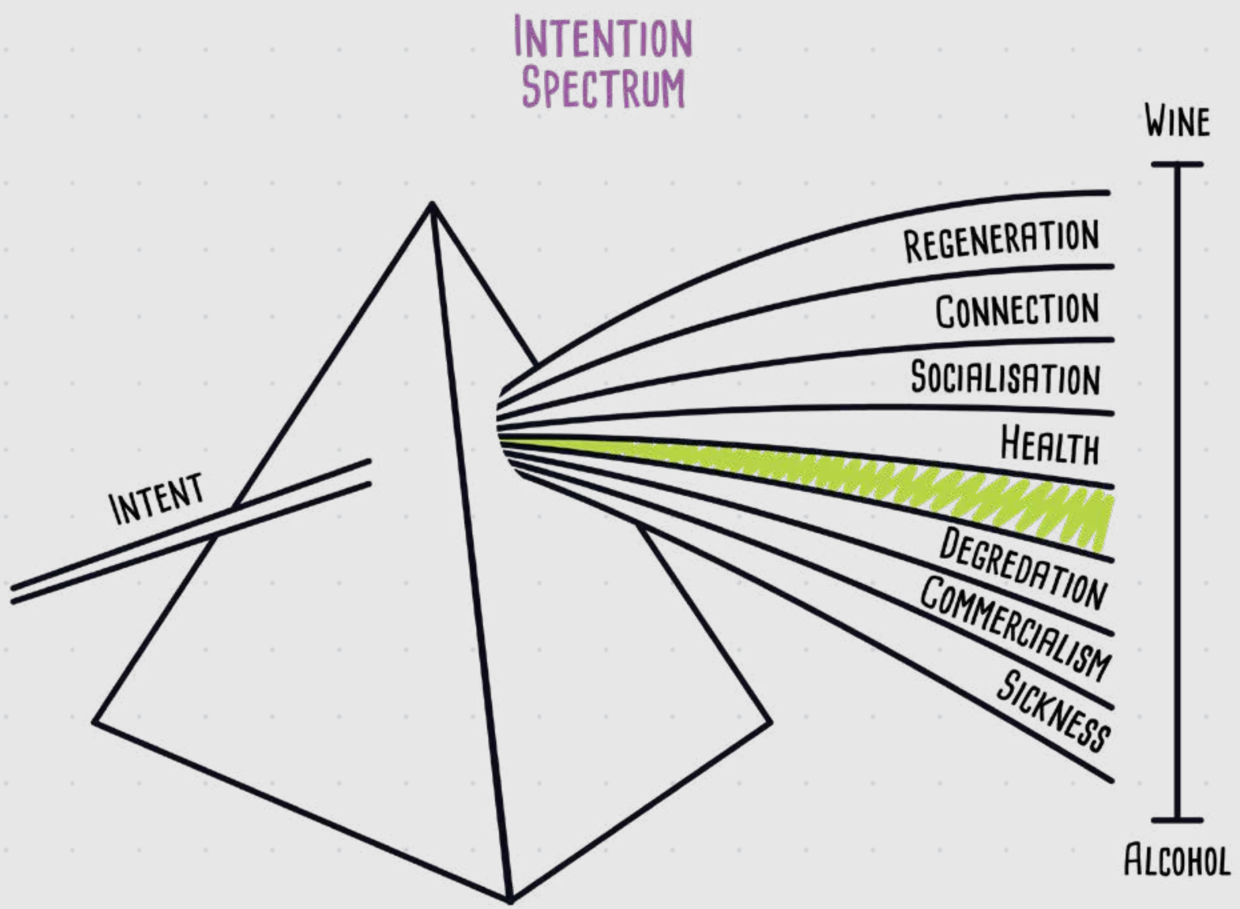


IS THE WINE INDUSTRY SICKER THAN WE THINK?

A pathway to wellness and a focus on health

by Nick Dugmore



When it comes to conversations about health and wellbeing, alcohol is currently in the firing line. The World Health Organization (WHO) has announced that no level of alcohol consumption is considered safe, and that alcohol causes cancer (World Health Organization, 2023). There is not one single cause of cancer. Cancer is "death by a thousand cuts"; however, some cuts are deeper than others. I believe alcohol contributed to my stage 4 bowel cancer, yet I love and respect wine more than ever.

"Wine people" are incredibly infectious in their passion; they are storytellers. They have bought into the 9,000-year-long story of wine, and the story of the businesses they own or work for. They respect the vineyards that provide the fruit and are in tune with the seasons. They are at the mercy of and accept the challenges of an agricultural industry. The intensity of vintage provides a level of focus and direction that requires intense presence and leads to a "war-like" camaraderie rarely found in other sectors. At the end of the day, it's all celebrated with a glass of wine, savouring the results of all that effort – a glass that has become part of the story and history. It represents something more meaningful than many, including the WHO, seem to understand.

The sector's reaction to the WHO's announcement has been interesting: many took it personally, as a blow to the ego. Naturally, the response from such passionate people has been defensive. The anti-alcohol campaign has been aggressive. Shock and fear have been used as powerful marketing tactics to achieve the intended impact on society. Nobody likes to hear that their actions may harm themselves or their consumers. The campaign has made it impossible for the sector to sweep this under the rug to suit our narrative. Our industry must find a pathway back to health and build a new narrative around how wine can contribute to health and wellbeing.

What is health?

This is the all-important question we need to ask ourselves. How can we contribute to it – both for the individuals working in this sector and our industry – to remain relevant to increasingly health-conscious consumers?

Health has been the major focus of my life for the last two years through my ongoing cancer journey. There is so much I've learnt about health, wellbeing and the importance of connection and regeneration. Being healthy is not just "not being sick". It requires a much more holistic approach. Only when you are sick do you truly realise what it means to be healthy.

We are a product of our environment. The better we identify factors that degrade our health and shift them toward those that regenerate it, the smoother our path to wellbeing will be.

The wine sector is at a critical point where it needs to identify the factors that have led to its degradation. Difficult and uncomfortable conversations must take place, and meaningful change must happen if we are to stay relevant in the market.

We need to acknowledge the difference between alcohol and wine, and between focusing on commercialism and emphasising connection and socialisation.

Striving towards socialisation

Intent is the key contributing factor that separates wine from alcohol. What is the intention of the producer, or of the product, and what are the ramifications as a result?

In 2024, Dr Craig Emerson was appointed by the minister for agriculture, fisheries and forestry to examine whether there was a market failure in the grape and wine sector and to provide advice about regulatory or other interventions (Wine Australia, 2025).

He reported that four companies – Endeavour Group, Coles, Metcash and ALDI – comprise 80 per cent of the domestic retail market. Coles alone owns 260 wine brands, each with multiple products in its range. The report also states that 41 per cent of total wine production comes from Treasury Wine Estates, Pernod Ricard and Accolade Wines (now Vinarchy), and Casella Family Brands. The intent behind brands and products within these companies varies significantly; however, many would never see the light of day were it not for their monopoly over supply chains.

I offer the following example at one end of the intention spectrum. Some friends brought a Tempranillo to a BBQ. The label told a story about "Pablo and Pedro", who were both "great artists", but that's all they had in common. Each had unique artistic traits, and the wine was made as "a homage to Spanish craft and passion". It then explained the sensory characteristics the consumer will experience. The producer noted on the label is "James Busby Fine Wines". James Busby was a founding father of the Australian wine industry. Coles now owns James Busby Ptd Ltd. It sells for $12 a bottle, or two for $15.

At the other end of the intention spectrum are wines that indicate effort, connection and reward. The 2024 Ms. L Organic Shiraz reads: "Crafted in small batches from a single vineyard, each bottle offers a refreshing story of the land, designed to accompany celebratory moments of life." The winemaker includes her name on the bottle and acknowledges the grower who provided the fruit. Her website reads: "To her, wines are history encapsulated in a bottle, ready to witness and enhance special occasions."

Reaching towards regeneration

We inherit practices and methods for a range of reasons – convenience, speed, or traction. We do this in our personal lives, where we might know how to look after our health, but find it more convenient to reach for fast food or ignore our mental health priorities until we're less busy.

It's these small shifts that move us more towards degradation over time. When we have a strong intent for regeneration, it helps us move closer to health and wellbeing.

So what might this mean for the wine sector?

Scientists have warned that 90 per cent of Earth's soil could be degraded by 2050 unless urgent action is taken. If not addressed, the planet will cease to function (Claughton, 2024).

When we undermine soil health, we undermine human health.

For a finished wine product to achieve a low retail price, the grower's intention must be quantity. This practice of high-yielding viticulture is akin to salmon farming, cattle feedlots or battery farms. The vines are on life support. Humans have become the "base" of the soil food web, and all life is destroyed through chemical input. The intent comes at a detrimental cost to soil health and, therefore, human health. These "wines" have a story but are horrific, embarrassing and unsustainable – so hollow that they can't be conveyed to the consumer. Stories like Pablo and Pedro's are a distraction from talking about production. This is not wine. It is soulless. It is alcohol made from grapes.

Alcohol is, of course, an ingredient of wine. However, another ingredient of wine is its story. A good story brings people together. Eye contact stimulates the prefrontal cortex and helps us learn emotion, intention and social cues, all elements of empathy. Stories help us bond. Bonding releases neurochemicals like dopamine, serotonin and the "love hormone" oxytocin. These chemicals help build trust and a sense of belonging. A good story helps develop community. It forces you to take a moment to engage and connect. It provides a sense of self. A community network is an exchange of energy, resulting in better mental and physical health for all. A heightened feeling of security lowers the stress hormone cortisol. Fear is perhaps the most potent carcinogen of all. And finally, a story has intent. It intends to induce emotion and stimulate connection. It forces you to pause and be present – the mind and the body together, which seems rare these days. All these things create health, and wine can and does contribute if consumers choose to let it.

Conclusion

For us to start walking a pathway towards health and wellbeing – for both individuals and our sector – we need to shift our focus from the commercialisation to socialisation of wine, and strengthen our commitment across all areas to move from degradation to regeneration.

This reflects my ongoing health journey, which I'm deeply passionate about. How can we better embrace our sector's storytellers – the contagious people? How do we continue regenerating ourselves, our cells and our futures together? It must start at the beginning, and that's a path I'm keen for others to join me on.

Wine made with good intentions is a story that leads to health for the teller and the listener. Our most powerful tool is connection through storytelling. We need to educate consumers on the difference between wine and alcohol, regeneration and degradation, connection and commercialism, and health and sickness.

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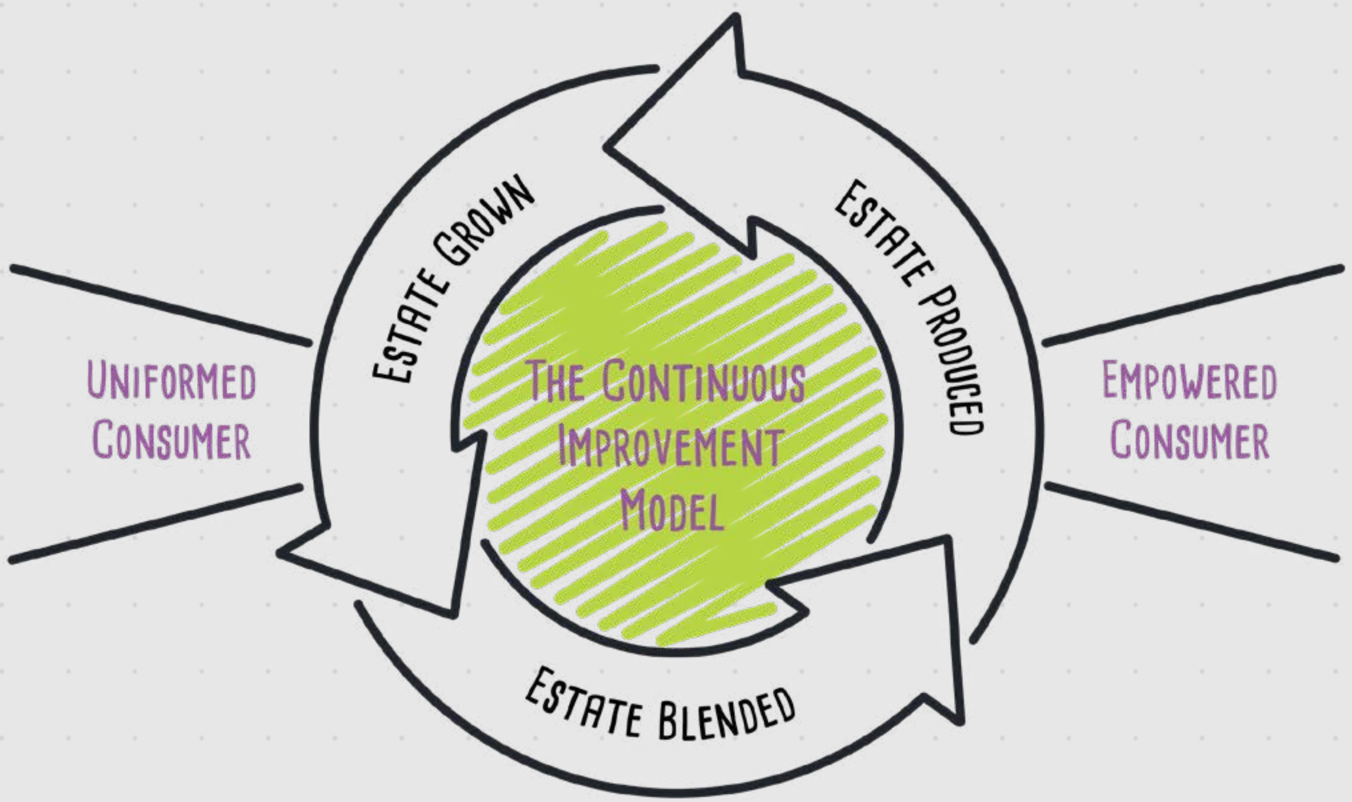
WHO MAKES MY WINE?

Strengthening the connection for consumers

by Ashleigh Seymour



HOME

There are numerous drivers behind why a consumer chooses a particular bottle of wine – brand recognition, price, variety, occasion and, increasingly, authenticity and the story behind it. But for many Australians, the real question is: Who makes my wine? Unlike in France or Italy, where labels clearly signal whether grapes were grown by producers, purchased and vinified, or bought as finished wine and bottled, the Australian story is often murky. Here in Australia, the same scrutiny is fraught with confusion: private labels, "phantom brands" (Biome, n.d.), and unclear ownership structures are keeping our consumers in the dark and stripping them of the ability to make informed choices.

Consumers are increasingly interested in provenance and value chain transparency in a wide variety of purchasing decisions. In the supermarket aisle, it is a clear choice whether to buy the home brand chickpeas, the fancy independent brand or something in between. Shouldn't Australian wine consumers be able to make similar choices wherever they purchase their wine?

A lightly regulated industry

Australia's regulatory framework around wine production is relatively loose compared to other traditional winemaking countries. Aside from the Label Integrity Program (LIP) and Food Standards Australia New Zealand (FSANZ) requirements, there are few limits on what can be grown, where, how, or how much may be produced. Grape purchases are guided only by a voluntary code, and wine is excluded from the Food and Grocery Code of Conduct.

No doubt, the freedom we have in this country has been advantageous for innovation, the adaptation of technology, and the ability to grow emerging varieties as we respond to climate change and create a more sustainable future for our sector. However, minimal regulation and the absence of a national vine register have likely contributed to some of the problems we are facing, including oversupply, record-low grape prices, and the growing disconnection between viticulture and production.

The power of the retail oligopoly

The recent review of the Food and Grocery Code of Conduct (Commonwealth of Australia Treasury, 2024) and the Independent Review of the Food and Grocery Code of Conduct report (Emerson, 2023) have raised concerns about the oligopoly of liquor sales in Australia. Large retail chains dominate, controlling between 70–80 per cent of the retail wine market, and within this they prioritise their own labels and phantom brands.

For the average consumer, it is nearly impossible to grasp who the ultimate owners of many wine brands are, with the only clue often being a major city CBD address. This lack of clarity is not confined to the major retailers; many other beverage companies operate similar models, moving wine under secondary or tertiary labels to preserve the brand equity of their parent company. The situation is confusing enough for producers to navigate, but spare a thought for the consumer, who cannot make a choice that aligns with their values due to the limited information available.

Lessons from Europe

In France and Italy, wine is an integral part of culture – a beverage steeped in tradition and a sense of place. Just as importantly, consumers have a high level of trust in the origins of the wine they drink due to a multi-layered labelling and tax system which identifies provenance. In many French appellations, the colour and code depicted on the Marianne symbol on the capsule shows whether the wine was made by a grower, a cooperative or a négociant. In Italy, diverse phrases on the back label serve a similar purpose, while DOC/DOCG seals provide additional information, even down to the official analysis of the wine. Nobody is suggesting that we should replicate the bureaucracy of European appellations, but we might take heed that even small cues can empower consumers to make choices that align with their values.

Why transparency matters for Australia

The sheer spread and dominance of major retailers in liquor distribution in Australia make it harder for independent stores to survive and, consequently, for informed consumers to access a wide range of independent and commercial labels. Consumers of Australian wine value storytelling; therefore, accurate information on provenance, ownership and sustainability is one way to share these stories and leave consumers feeling empowered.

An empowered consumer is more likely to seek out independent producers, venture into new brands and wine styles and potentially bring others along for the ride. We pride ourselves on our history of winemaking and the stories and innovations that have shaped the growth of our industry. For it to be sustainable, we need to give the power of choice back to consumers.

The Australian wine sector is structurally diverse: approximately one-third of producers are wholly vertically integrated, estate-grown and produced, around one-tenth are bulk bottlers who trade and bottle mostly finished wines, and the rest are hybrid structures (Emerson, 2023; IBISWorld, 2023). This reflects the adaptability of our sector, supporting around 6,000 growers who either focus exclusively on growing grapes or operate as partially integrated companies themselves. Compare this to Italy, where at least half of all grapes grown are supplied to cooperatives and large wineries, mostly through smaller family vineyard holdings, often less than five hectares (Eurostat, 2023).

Why, then, is the lack of cohesion – and the idea that grape growers and winemakers are on two different planets – such a present conundrum? A handful of wine producers are bucking the trend, making deep commitments by involving their growers in two-way dialogue and shared strategy. Otherwise, a significant opportunity remains for tighter collaboration and cohesion to drive the sector forward. Transparent labelling could help resolve these differences, encouraging symbiosis between soil, vine and wine and those who curate the process, while also helping to rebalance supply and demand and address the wine grape pricing challenges facing the sector.

In a time when maintaining the cultural significance of wine seems like a David and Goliath battle, the last thing we should do is perpetuate elitism and inaccessibility to consumers. Transparent labelling could help demystify and transmit part of the wine story while giving more gravitas to our industry-wide sustainable practices and custodianship of the land – both essential to producing a luxury product. Done well, this could contribute to preserving and reigniting food and wine culture at our tables.

Potential pathways

Imagine a world where the consumer walks into a store, picks up a bottle of wine, and can, with a glance or a quick read, gain some basic insight about how that wine came to be in front of them. Potential solutions are numerous, and recent reports and discussions within the sector have shown there is interest and future commitment to label transparency. This demonstrates that we can push through potential rebuttals of increased bureaucracy and red tape that inhibit already-stretched producers.

To identify whether the wine at hand is vertically integrated, estate-produced or estate-bottled, pathways could include:

- a collective trust mark owned by an association on an opt-in basis
- a certification trademark requiring rules and ACCC approval
- a simple phrase included in line with the address of production managed by the Label Integrity Program framework
- integration into the existing Sustainable Winegrowing Australia trust mark.

This is by no means an extensive list of the possibilities, but the principle must remain that the consumer should be informed about the supply chain of their wine choice. Any of these options will require some degree of regulation, organisation and administration, but the relative simplicity of integrating them into an existing system could be preferable.

Beyond the Emerson Report

The Emerson report identified the major issues around the liquor oligopoly and grape price fairness, but its recommendations fell short of advocating for greater consumer empowerment. Two of the major retailers have committed to improving transparency on own-brand labels by providing the address of the winery where the wine is produced, and potentially the ultimate owner of the product (The Shout, 2024).

The manufacturer's address is not in question here; nobody is on a witch hunt to determine which winery supplies bulk product to fill these brands. However, consumers should be able to identify an own brand without ambiguity. It is also unfair to single out just one piece of the puzzle when many wine companies employ similar models to facilitate the sale of bulk wine or parcels that are non-representative of their main brand. Furthermore, this is not to say that one system is better than another; they all serve a purpose in the market. But we should allow consumers to reward what is important to them. Naked Wines has already identified that consumers want more transparency and fairness in the industry and are willing to put their money where their palate is (Drinks Trade, 2024). So what are we waiting for?

A true blend

The real opportunity lies in a sector-wide solution that encourages consumers into the fold, sparks their curiosity around our complex agricultural products, and organically grows our industry with a united front. This approach could embed fairness and transparency into our supply chains while collectively marketing wine to consumers at the same time.

In an increasingly disconnected world, we have the chance to rekindle a connection with our consumers over a (transparent) glass of wine. The question we began with – "Who makes my wine?" – should never be murky. Instead, it should be answered with a glance at the back label, empowering consumers with our stories, strengthening the bond between growers and producers, and solidifying a positive future for Australian wine.

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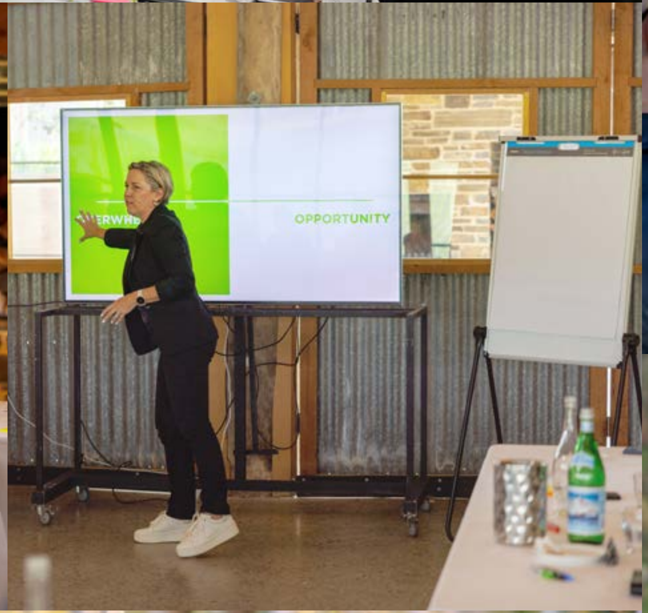
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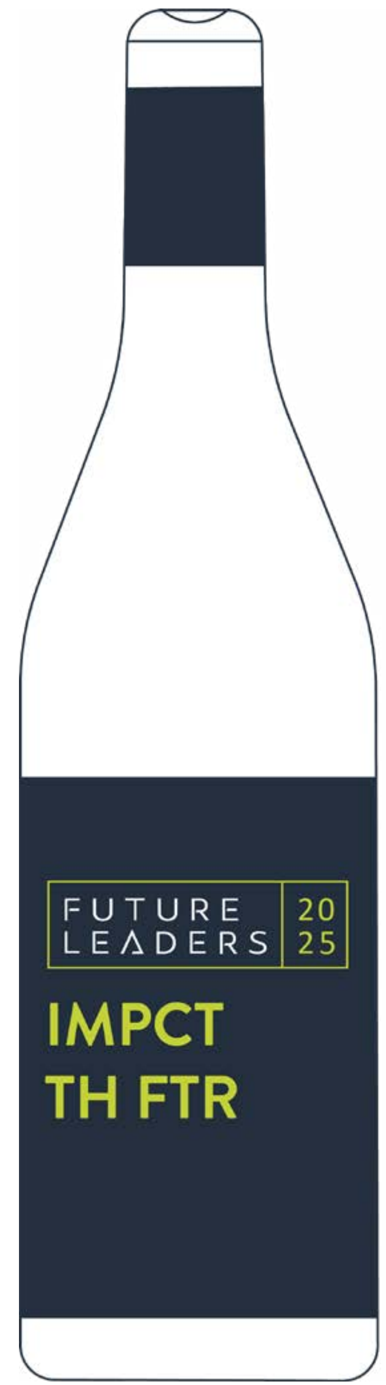

Wine Australia

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