



Wine
Australia



One Grape & Wine Sector Plan

2026 Actions Workshop

New South Wales

Progress and achievements



Our Place and Product

Our sector needs to protect its vineyards, increase resilience, and drive innovation by leveraging market and consumer insights to maintain global standards while preserving regional uniqueness.

Australian Grape & Wine has:

- **Advocated for targeted government assistance:** and policy measures to support sector transition, business resilience and regional sustainability.
- **Supported producers:** to adapt to changing consumer and market preferences, including through engagement on packaging, innovation and regulatory settings.
- **Advanced industry discussions:** on mechanisms to address structural oversupply and support an orderly rebalancing of the sector.
- **Advocated for practical, evidence-based sustainability:** biosecurity and climate resilience policies affecting vineyards and wine businesses.
- **Worked with government and industry stakeholders:** to support long-term sector competitiveness, innovation and regional prosperity.

Wine Australia has:

- **Progressed the National Vineyard Register:** including detailed sector consultation, engaging a build partner, developing platform framework and design, and continuing conversations with Vinehealth Australia. The register is planned for release in late 2026.
- **Continued to provide data and insights to support supply and demand:** including the National Vintage Report, Production, Sales and Inventory report, Export Reports, Economic Contribution of Australian Wine report, Market Bulletins, consumer insights for key markets, and delivered the Grape Growing Cost Calculator, new domestic sales dashboard and a study into consumer behaviour in the Australian on-premise.
- **Co-designed innovation to align products with consumer and market demand:** including mid-strength wine category development and research into innovations across vine, production and packaging solutions.
- **Funded on-the-ground support for growers and makers:** including joint appointment in Riverina, the National Advisor Network and local Discussion Groups.
- **Invested in supply options across seasons:** including mothballing vineyards or resting vineyards, circularity for vineyard waste including CCA posts, CSU Vineyard of the Future project and Wine Industry Smoke Detectors sensor development.
- **Invested in supply security to ensure quality, health and integrity of planting material:** through new nursery certification program VitiCert Australia to ensure quality of planting material, biosecurity for pest and diseases, soils and sustainable practices, agtech trials, smoke testing, and grapevine breeding ongoing grapevine and rootstock breeding program including field trials in NSW of Gen 1 and Gen 2 disease-resistant varieties.

NSW Wine has/is focused on:

- **2026 Innovation Forum:** NSW Wine will host its next innovation forum in Wagga Wagga in July 2026. The forum will set out NSW Wine's RD&E priorities over the next 24 months with a prospectus containing investment ready project proposals. The forum provides the setting for meaningful industry input into our RD&E priorities.
- **Oversupply:** Recognising the continuing downward pressure old wine is putting on the market, NSW Wine is working with the Manildra Group on potential disposal options.
- **NSW + ACT Regional Plan:** NSW Wine continues to deliver Spring Field Days and RD&E priorities focussed on profitability and productivity through the NSW Wine and Wine Australia Regional Plan.
- **Profitability tools:** NSW Wine has invested along with Wine Australia and the Riverina Wine Grape Growers in profitability tools for inland growers, including the 'Grape Growing Cost Calculator'.
- **National alignment:** NSW Wine is actively supportive of AG&W's advocacy ongoing efforts and budget submissions and their efforts to address fair trading and competition.
- **Funding opportunities:** NSW Wine (with CSU and Wine Australia) is seeking funding to develop a connected network of commercial vineyards across NSW to capture new technology performance across diverse growing regions and drive technology uptake with growers.

Grape & wine producers can:

- Adopt sustainable and innovative vineyard practices
- Align business and product plans to market trends and data
- Respond to supply and demand imbalance



Our Markets

Our sector needs to increase its international presence while growing its footprint in the domestic market through collaborative efforts, innovative marketing strategies, alignment with consumer trends, reducing trade and market access barriers and a continued dedication to quality.

Australian Grape & Wine has:

- **Advocated for fair and transparent commercial arrangements:** across the wine value chain, including implementation of the mandatory Code of Conduct for winegrape purchases.
- **Progressed export market access and trade advocacy:** through engagement on FTAs, tariffs, technical barriers and international regulatory issues.
- **Worked collaboratively:** with Wine Australia, government and industry stakeholders to support market diversification and export growth opportunities.
- **Advocated for targeted government investment:** to support export market re-engagement, diversification and domestic market growth.
- **Continued engagement with policymakers and stakeholders:** to strengthen the long-term competitiveness and reputation of Australian wine in domestic and international markets.

Wine Australia has:

- **Supported domestic sales:** by launching the "We make a wine for that" domestic campaign in August 2025 with flexible, reusable marketing assets.

- **Provided domestic insights:** with the delivery of the domestic sales dashboard.
- **Sponsored national quality-focused programs:** such as the Wine List of the Year Awards and Halliday Wine Companion 'People's Choice' Award, to support on-premise positioning and consumer consideration.
- **Hosted key decision makers:** from Canada, Japan, USA, UK, Europe and educators from China and Southeast Asia as part of the inbound visits program.
- **Expanded digital promotion:** Engaging and supporting brands and industry across industry-, trade- and consumer-facing social media, digital content, webinars and the refreshed Australian wine website.
- **Increased global awareness of Australian wine:** including an extensive program of activity across trade shows, roadshows, education seminars, and collaborative partnerships designed to reach both trade and consumer audiences.
- **Improved market access through global engagement:** including the World Wine Trade Group and OIV, updated more than 41 Export Market Guides and continued regulatory services with audits and export assistance.

NSW Wine has/is focused on:

- **Domestic marketing:** Building an impactful annual domestic marketing program that grows the number of wines consumed in Sydney and listed on Greater Sydney wine lists. This includes consistent social media educating consumers about our regions and highlighting our businesses and people, major events like Sydney Cellar Door and Winter Cellar Door, all complimented by trade activities.
- **NSW Wine Month:** NSW Wine month was conceived in 2024 and grew significantly in year two in terms of events and engagement. NSW Wine will continue to anchor events around NSW Wine Month in November and build NSW Wine Month into a bigger celebration of local wine.
- **Government and industry partnerships:** NSW Wine has focussed on growing diverse and highly productive partnerships that increase domestic demand and provide marketing and sales opportunities to members. Including ongoing partnerships with Placemaking NSW (The Rocks), ICC Sydney, Destination NSW and Carriageworks while also working closely with Biennale of Sydney and Vivid over the past 12-months. Hosting the NSW Wine Show and NSW Sommelier Wine List Awards annually and the NSW Wine Month collaborating with Dan Murphy's and Good Food to promote local wine businesses.
- **'Buy Local' procurement advocacy:** NSW Wine continues to advocate for an NSW Government 'Buy Local' procurement policy and has provided input into the recent Parliamentary Inquiry at all its stages. In the absence of formal policy NSW Wine works closely with NSW Government departments to ensure local wine businesses are prioritised and we have been pleased to see an increased focus on local businesses at major festivals like Vivid and at state venues like the new Sydney Seafood Markets.
- **Export directory:** NSW Wine has worked with Investment NSW to develop a wine directory of export ready businesses for international wine buyers. The tool fills a significant knowledge gap for in-market government representatives.
- **Inbound/outbound export visits:** NSW Wine's advocacy means wine now forms a core part of Investment NSW's business as usual export activities and funding allocations, with a focus on Asia and SE Asia.
- **Accessing New Markets Initiatives (ANMI):** NSW Wine is working with AG&W and other states as part of a consortia to allocate new export funding to several priority markets.

Grape & wine producers can:

- Diversify product offering
- Brand building and storytelling
- Tailor market strategies and participate



Our Sustainability

Sustainability is central to our sector's current and long-term resilience and profitability. Our sector aspires to be recognised as a global leader, it therefore needs to embed environmental, social, and governance (ESG) practices to enhance resilience, profitability, and sustainability.

Australian Grape & Wine has:

- **Advocated:** for practical and evidence-based sustainability policies that support environmental outcomes alongside sector productivity and profitability.
- **Continued leadership and engagement on ESG:** climate resilience, packaging sustainability, biosecurity and circular economy issues affecting the wine sector.
- **Worked with government and industry stakeholders:** to improve sustainability outcomes while minimising unnecessary regulatory burden on producers.
- **Supported industry collaboration:** and policy development on emissions reduction, water, waste, recycling and sustainable production practices.
- **Supported governance and leadership renewal at Sustainable Winegrowing Australia:** including transition to a new Chair, Executive Officer and Board Directors.
- **Continued advocacy on sustainability-related regulatory reforms:** including container deposit schemes, environmental reporting and packaging obligations.

Wine Australia has:

- **Future-proofed supply through:** investment in grapevine and rootstock breeding, development of disease-resistant varieties, identifying pathways to market for new plant material, the National Grapevine Collection, VitiCert Australia, and Wine Industry Smoke Detector tool.
- **Developed grape and wine business ESG toolkits:** including Sustainability Reporting and Communications Guides, Ethical Business Guides and a four-part ESG webinar series.
- **Advanced sustainability through:** trials of non-chemical treatments using a UV-C light unit towed by an electric, autonomous vehicle, development of practical soil health resources, smoke risk support for NSW regions, and water-use innovation initiatives.
- **Promoted Sustainable Winegrowing Australia in our marketing:** At tradeshow, roadshow, expos, social media and market access discussions and released a sustainability practice video series.
- **Strengthened regional sustainability capability:** through joint roles across key regions, targeted local upskilling, and projects in soils, climate, carbon and agtech.
- **Driven collaboration and improvement in Sustainable Winegrowing Australia:** Collaborated with AGW and AWRI to activate governance recommendations and appoint the new Chair, EO, Board Directors, and co-funded improvements through the Australian Wine Future Fund.
- **Facilitated grant support for the sector:** across light-weight glass and alternative packaging (BRIL), drought and industry resilience (SA Drought Hub), and commercialisation of the Wine Industry Smoke Detector (AEA Innovate).

NSW wine has/is focused on:

- **Productivity, Profitability and Sustainability:** The industry must become more sustainable in terms of profitability. Where NSW Wine is making investments, it is looking through the lens of productivity, profitability and sustainability. This includes current grant and funding programs like the Wine Inland Productivity and Profitability Project and the NSW + ACT Regional Program, as well as all future grant applications.
- **Sustainable Winegrowing Australia:** NSW Wine is supportive of the new model including the transition to a new Chair, Executive Officer and Board Directors. This includes ensuring NSW representation on the SWA Advisory Committee Board.
- **Marketing:** NSW runs a range of activities for Sydney Trade and where relevant has themed them around sustainability, regenerative farming and biodynamics.

Grape & wine producers can:

- Adopt sustainable practices
- Communicate sustainability commitments
- Reduce carbon emissions



Our People

Our sector is a respectful and inclusive community, and we need to foster diverse leadership, long-lasting careers, and provide the knowledge and skills for resilient businesses.

Australian Grape & Wine has:

- **Continued to foster an inclusive, collaborative and representative wine sector:** through committee engagement (DEIW), governance renewal and industry leadership development (DEIW Charter).
- **Supported diversity, equality and inclusion:** initiatives across the sector, including ongoing promotion of the Gender Equity Toolkit and industry capability building activities.
- **Strengthened sector advocacy and collaboration:** through active committee participation and stakeholder engagement across the industry.
- **Supported workforce capability and organisational development:** through Board, committee and staff renewal, including the appointment of Helen Strachan as Chair of Australian Grape & Wine.
- **Continued to invest in organisational capability:** through staff recruitment and expanded partnership and engagement support.

Wine Australia has:

- **Developed national leadership capability:** through Future Leaders 2025, Rootlings young professionals network, Next Crop Hunter Valley 2026 and Wine Industry Mentor Program. Strong NSW participation including Daniel Mortimer (Orange) in Future Leaders, state and regional Rootlings champions, and 12 of 52 mentor program mentees.
- **Supported industry careers:** through scholarships, awards and education partnerships, with NSW activity including a Hunter Valley vintage placement, supporting a teacher conference at CSU, and connecting CSIRO with Pittwater High School to trial hybrid varieties in their vineyard program.
- **Strengthened extension and adoption:** through events, discussion groups, a National Advisory Network and resources designed to build capability and improve knowledge sharing. Evolved national extension and adoption strategy incorporating Regional Program with enhanced collaboration and co-design across partners. Supported regional extension and

adoption delivery in NSW through Penny Flannery (NSW DPI) and Chrissy Smith, and a joint appointment in Riverina.

- **Advanced diversity, equity and inclusion:** through the Australian wine industry Gender Equity Toolkit and research study, as well as webinars, industry partnerships (including Australian Women in Wine and AGW DEIW committee), reports and support to drive awareness, action and outcomes across the sector.
- **Delivered a sector guide for Acknowledgement and Welcome to Country protocols:** through Wine Australia's Reflect Reconciliation Action Plan, strengthening ongoing partnerships with First Nations peoples.
- **Curated a comprehensive resource:** of crisis, wellbeing and mental health services and programs on the Wine Australia website in support of business resilience across the sector.

NSW wine has/is focused on:

- **Membership:** NSW Wine has a fast-growing membership base that is highly representative of the NSW wine industry from our inland regions to smaller and cooler regions. NSW Wine brings industry together through a range of forums from events to workshops, awards and advocacy work.
- **Rootlings:** NSW Wine played a role in establishing the Rootlings program several years ago (with support from Wine Australia) and continues to support its growth by including young professionals' streams into all our activities. This includes dedicated spots in industry forums, trade and consumer and events and recent overseas education experiences.
- **AgSkilled 3.0:** AgSkilled delivers short and practical viticulture courses and continues to be funded by the NSW Government. NSW Wine is a strong advocate for the ongoing funding of it.
- **National participation:** NSW Wine Board Members and other business owners participate on a range of national boards and committees while NSW Wine works closely with TAFE NSW on skills development opportunities.

Grape & wine producers can:

- Support programs to make the sector a career of choice
- Invest in employee training and development



Our Systems

Our sector needs to integrate state-of-the-art technologies, digital methodologies, and data-driven approaches to improve efficiency, quality, profitability, competitiveness, and connectivity.

Australian Grape & Wine has:

- **Advocated for:** better infrastructure, investment and regulatory settings to support efficient and competitive wine businesses.
- **Continued work on digital transformation:** and reducing red tape across the sector.
- **Led advocacy on container deposit schemes:** including rollout impacts, harmonisation and the need for a national portal.
- **Improved industry communication and information sharing:** through webinars, digital updates and stakeholder engagement.
- **Continued engagement on:** technology, innovation and data issues affecting the future of the sector.

Wine Australia has:

- **Unlocked investment opportunities:** through the Australian Wine Future Fund (AWFF), driving additional investment into wine sector innovation through co-design and co-investment with partners to create impact.
- **Supported digital transformation and vineyard future proofing:** through agtech trials and alternative energy projects focusing on electric or autonomous vehicles, robotics, and CSU Vineyard of the Future.
- **Supported digital transformation in regulation and market access:** through WALAS enhancements, certification refinements, working towards improvements to trade processes, collaboration with government and international partners, and strengthened data systems underpinning key industry tools including the National Vineyard Register.
- **Improved access to information:** through refreshed, role-focused newsletters 'VitiSnips' and 'On the Marc', expanded digital content including webinars, video and social media, and refreshed websites for consumers and the sector in development.
- **Funded AWRI extension services:** webinars, fact sheets, technical bulletins, Dog Book, HelpDesk and Information Services Library.
- **Strengthened data management:** through improved records archiving, enhanced data systems, and exploration of AI to future-proof platforms.

NSW wine has/is focused on:

- **CDS:** Wine bottles are being included in the NSW CDS. NSW is working closely with AG&W to advocate for small producer exemptions, better payment terms and a place on the scheme operator board.
- **Collaboration:** NSW Wine is committed to working more closely with our national and state bodies to ensure we are working together on national problems, there is no duplication and we benefit from sharing resources.
- **Vineyard of the Future:** NSW is working with its state agency to understand how we can support vineyard mapping and Wine Australia's National Vineyard Register Project and where this has overlapping benefit.

Grape & wine producers can:

- Invest in technology and data integration
- Streamline supply chain processes
- Enhance regulatory compliance measures



Our Customers, Consumers & Community

Our sector needs to be more flexible and responsive to the needs of consumers, customers, and communities, and ensure social licence is maintained in a rapidly evolving market landscape.

Australian Grape & Wine has:

- **Advocated for balanced, evidence-based alcohol policy and regulation:** including through ACMA, CODEX and ABAC processes, working with national, state and international partners. Supporting industry-led initiatives to promote moderation, including through support of Drinkwise, and encouraging age-gating in social media.
- **Supported industry understanding of changing consumer preferences:** moderation trends and evolving market expectations.
- **Worked collaboratively across the sector:** to improve communication, share information and develop practical policy solutions.
- **Continued engagement with tourism, retail, on-premise:** and trade stakeholders to support the reputation and long-term success of Australian wine.

Wine Australia has:

- **Established a cross-sector consumer insights advisory group (CIAG):** for data and trend sharing to support innovation, growth and opportunities for the sector, such as the mid-strength wine category concept development.
- **Strengthened access to consumer insights:** through domestic sales dashboard and research led by partners including Square Holes, IWSR, KMPG, Nielsen IQ, Endeavour Group and various wine businesses.
- **Supported and sponsored industry-led events and programs:** focused on domestic sales, direct-to-consumer, wine tourism, supply chain and on-premise.
- **Reviewed and refreshed the Wine Tourism Ready program:** for re-launch by 2027, to ensure it remains relevant and practical for wine tourism operators.
- **Raised the profile of the Australian Wine brand:** by refreshing the Australian wine website and Australian Wine Connect digital exhibition, reinvigorating the Australian wine Instagram to engage with trade and consumers and delivered international education programs through Australian Wine Discovered modules.

NSW wine has/is focused on:

- **Partners:** NSW is focussed on forming productive industry partnerships that help wineries grow their business. NSW Wine has partnered with, or has ongoing partnerships with: ICC Sydney, DNSW, The Rocks, Investment NSW, Sydney Wine Academy and TAFE, Good Food, Sommelier's Australia, Endeavour, The WinedUp Podcast, Riedel and a host of other.
- **Communications:** NSW's communications through newsletters, website and social media are continually growing and evolving to ensure we are talking more to our members, trade and consumers.
- **Events:** NSW's runs a range of major wine events that promote moderate and healthy drinking habits and position wine

Grape & wine producers can:

- Engage local communities
- Leverage consumer insights
- Support positive engagement in public health

Broad sector challenges

Increased market expectation for sustainability credentials

Rapidly changing consumer preferences

Increased cost of doing business

Global shipping challenges

Impacts from extreme climatic events



More direct health lobby



Declining global wine consumption

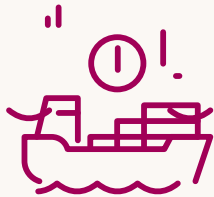
Mental health pressures

Fuel & fertiliser supply and cost

Access to workers and workforce

Australian record wine production combined with reduction in sales

Trade headwinds



Impact on regional wine tourism



Rising inflation, interest rates and cost of living

Certification burden

Vineyard abandonment / Succession planning

Taxation changes and CDS

Urgent sector priorities

- At the launch of the OGWSP in August 2024, we committed to six key urgent sector priorities. We reported on their progress in 2025. Since then, further progress has been achieved:

Priority	AGW	Wine Australia	NSW Wine
<p>Balance supply and demand</p> <p>Objective</p> <p>Determine the true demand position and future-proof Australia's production base.</p>	<ul style="list-style-type: none"> • Delivered a comprehensive pre-Budget submission focused on rebalancing supply and demand. • Undertook extensive parliamentary engagement with 40+ parliamentarians and advisers, positioning supply-demand imbalance. • Worked to align and amplify advocacy across states and regions. 	<ul style="list-style-type: none"> • National Vineyard Register Framework delivered and build underway. • Grape Growing Cost Calculator launched. • Launched Domestic Sales Dashboard and conducted deep-dive study into consumer behaviour in the Australian on-premise. • Continued annual Vintage and Production, Sales, and Inventory surveys. • Released the Economic Contribution of the Australian Wine Sector report. • Inland Grower Revenue Options Decision Support Guide with AgriFutures through funding from Department of Agriculture, Fisheries and Forestry. 	<ul style="list-style-type: none"> • Supported national-led policy advocacy efforts and AGW budget submissions; Efforts to address fair trading and competition. • Grape Production Calculator: NSW Wine co-funded (with Wine Australia and Riverina Winemakers) for in-land growers to better understand their inputs and profitability. • NSW Wine is highly active in funding, developing and supporting initiatives that grow wine markets for NSW producers both domestically and internationally.
<p>Diversify and intensify our international markets</p> <p>Objective</p> <p>Engage global markets to increase demand for Australian wine</p>	<ul style="list-style-type: none"> • Continued collaboration with Wine Australia on national marketing, tourism and export diversification priorities. • Progressed trade advocacy through FTAs, market diversification work, and engagement on tariffs and global trade pressures. • Secured additional export-focused government support, including through ANMI and India market development opportunities. • Developed the proposed Export Market Re-engagement Fund for inclusion in the Federal Pre-Budget Submission. • Strengthened Australia's global wine trade leadership through engagement with the International Organisation of Vine and Wine. • Delivered the Australia-China Winemaker Immersion Program. 	<ul style="list-style-type: none"> • New consumer and market Insights and capability building. • Joint Marketing Group advisory committee coordination with AGW. • Consumer insights advisory group developments. • Mid-strength product innovation. • Tradeshow and roadshow activations in emerging and growth markets and new cities. • Education programs and capability. • Refreshed digital communications and social media strategy. • Hosted key decision makers from Canada, Japan, USA, UK, Europe and educators from China and Southeast Asia in an inbound visit program. • Collaboration across RDC food & wine group in emerging markets in Asia. 	<ul style="list-style-type: none"> • NSW Wine has identified 6 priority markets (UK, US, China, Japan, South Korea and Vietnam) to drive our international engagement. • Funding: NSW Wine and Investment NSW have co-delivered \$1 million of export programs in China, Japan and Vietnam in FY25. • Partnerships: NSW Wine works closely with Investment NSW both onshore and offshore to ensure wine is included in all export activities where the NSW wine industry has identified a priority market.

Priority	AGW	Wine Australia	NSW Wine
<p>Grow our domestic market</p> <p>Objective Support wineries to grow opportunities in the domestic wine market.</p>	<ul style="list-style-type: none"> Secured Government commitment to continue funding the Wine Tourism and Cellar Door Grant Program for the next three years. Included Domestic Wine & Regional Tourism Stimulus (\$20m) to support domestic demand and regional economies in pre-Budget submission. Re-enforcing the need to “buy Australian wine” in engagement with policymakers and media. 	<ul style="list-style-type: none"> Action domestic campaign “We make a wine for that” with reusable templates and tools. Developed the domestic sales dashboard. Collaborated with Endeavour Drinks Group on the ‘State of the Grapes’ report. Mid-strength category market insights. Sponsored Australian Wine List of the Year Awards, Wine Communicator Awards, and Court of Master Somms. Re-launched trade and consumer facing social media for the Australian Wine brand. Australian wine website updated May 2026. AWD education materials rebranded to new Australian wine livery. Wine Tourism resource updates to be launched by 2027. 	<ul style="list-style-type: none"> ‘Buy Local’: Through its advocacy, NSW Wine continues to make positive strides for a NSW Government ‘Buy Local’ wine policy. Greater Sydney trade: NSW Wine runs a 12-month trade tasting, masterclass and awards program to promote NSW wines to Greater Sydney trade including in-region activations. Consumer demand: NSW Wine runs a 12-month consumer event program to showcase and raise the profile of local wines. Awards: NSW Wine hosts both the NSW Wine Show and the Sommelier Wine List Awards. Partnerships: NSW Wine has partnerships with Destination NSW, The Rocks, Vivid and Carriageworks to deliver consumer events. Events: Sydney Cellar Door, NSW Wine @ Vivid, NSW Wine Cellar Door, NSW Wine @ Carriageworks and NSW Wine Month.



Priority	AGW	Wine Australia	NSW Wine
<p>Embrace sustainability and aim for continuous improvement in practices</p> <p>Objective Improve access to Sustainable Winegrowing Australia</p>	<ul style="list-style-type: none"> Completed Sustainable Winegrowing Australia (SWA) governance review in conjunction with Wine Australia strengthening the program's structure and accessibility. Implemented a new governance model, including appointment of an independent Chair, establishment of a new Board of Directors, and recruitment of a new Executive Officer (launched May 2026). Finalised a new tripartite agreement between Australian Grape & Wine, Wine Australia and the Australian Wine Research Institute, enabling enhanced oversight and management of SWA. Established a skills-based advisory board structure to support improved program delivery, industry engagement, and uptake. 	<ul style="list-style-type: none"> Worked with AGW and AWRI to finalise SWA governance review and implement new governance structure and Board. Funded regional programs for localised support of SWA training and awareness. Promoted SWA and SWA Trustmark wines at tradeshow and roadshows in international markets. Exhibited and delivered sustainability-focused activity at Winetech and AWITC, including SWA co-sponsored events, mid-strength and sustainability workshops. Produced resources for the sector in sustainability business strategies, communications planning and ethical business guides. Delivered ESG four-part webinar series. 	<ul style="list-style-type: none"> Extension: NSW Wine, through DPI and its wine extension officers, delivers the NSW + ACT Regional Program across the state. R&D: NSW Wine is guided by its RDE&A Prospectus (2021) which is due to be updated in FY26. Container Deposit Scheme: NSW Wine coordinating with AG&W and other states on any expansion to the CDS and national scheme harmony. SWA: NSW Wine has supported the adoption of SWA through funding, workshops and training. Corporate partners: Through its energy corporate partner NSW promotes and supports the transition to renewables where applicable.
<p>Defend wine's social licence</p> <p>Objective Defend wine's social licence in public health debate with anti-alcohol lobby</p>	<ul style="list-style-type: none"> Represented the wine sector in alcohol policy and public health inquiries, advocating for evidence-based and proportionate regulation. Prepared industry advocacy and messaging materials in partnership with Alcohol Beverages Australia. Advocated for balanced approaches to alcohol advertising and labelling regulation, including through ACMA and CODEX processes. Continued engagement with policymakers and stakeholders to support informed public health policy development. 	<p>* Wine Australia's role prohibits advocacy activities.</p>	<ul style="list-style-type: none"> NSW Parliament Friends of Grape Growers: Through its NSW Parliament Friends of Grape Growers, NSW Wine can engage across governments and promote our wine's positive role in regional communities, in tourism, our transition to becoming a more sustainable industry and other issues that support our social licence. Promotions: NSW Wine social media promotes responsible wine consumption and an inclusive wine industry. Low and no alcohol: NSW Wine promotes low and no alcohol products through its trade tastings and consume events like Sydney Cellar Door.

Priority	AGW	Wine Australia	NSW Wine
<p>Fit for purpose levy system</p> <p>Objective</p> <p>Ensure that the sector's national funding models are fit for purpose</p>	<ul style="list-style-type: none"> ▪ Progressed sector-wide discussions on the sustainability and effectiveness of the national funding model, including levies and broader industry structures. ▪ Established a Levies Working Group to examine options for reform and ensure funding settings remain fit for purpose. ▪ Undertook extensive consultation with stakeholders across regions, associations and companies, gathering diverse perspectives on funding priorities and structural settings. ▪ Identified limited alignment across the sector on levy reform, but strong consensus on the need to ensure existing structures are operating effectively and delivering value. ▪ A levy review remains under active consideration, alongside broader work to optimise current funding arrangements. ▪ Consideration of models to best serve the sector, along with changes to the status quo. 	<ul style="list-style-type: none"> * Wine Australia's role prohibits advocacy activities. ▪ Established the Australian Wine Future Fund (AWFF) including Research Innovation Fund (RIF) and Venture Investment Portfolio (VIP) to fund impact for the sector. 	<ul style="list-style-type: none"> ▪ Supportive of national-led policy: NSW Wine is supportive of AGW's review into the levy system and advocacy efforts.



New South Wales

Crush

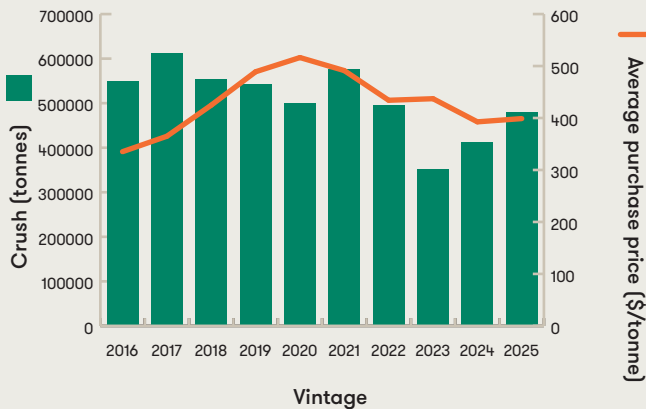


Share of Australian crush by volume **30.6%**

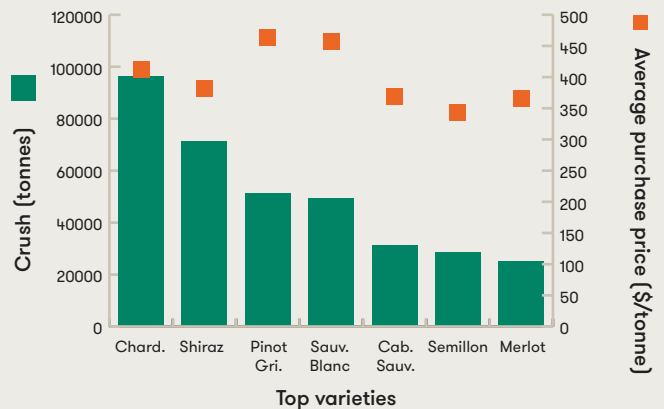


Share of Australian crush by value **18.5%**

Tonnes and average value



Top varieties in 2025



Exports

12 months ended March 2026, based on regional label claims: **New South Wales**

Total value	\$20m	▼ -14%
Total volume	9m litres	▼ -10%
Average value	\$2.31/litre	▼ -4%

Price point by value

\$15.00 +	\$3.7m	▼ -27%
\$10.00-\$14.99	\$1.9m	▼ -18%
\$7.50-\$9.99	\$1.6m	▼ -12%
\$5.00-\$7.49	\$1.7m	▼ -35%
< \$5.00	\$11.4m	▼ -3%

Top 5 markets by value

United Kingdom	\$5.2m	▼ -21%
Mainland China	\$2.9m	▼ -37%
Japan	\$2.2m	▼ -5%
Belgium	\$1.4m	▼ -20%
South Korea	\$1.0m	▲ 20%

Exports

12 months ended March 2026, based on regional label claims: **South East Australia**

Total value	\$649m	▼ -10%
Total volume	404m litres	▼ -5%
Average value	\$1.61/litre	▼ -6%

Price point by value

\$15.00 +	\$4.9m	▲ 314%
\$10.00-\$14.99	\$1.5m	▼ -50%
\$7.50-\$9.99	\$15.1m	▼ -25%
\$5.00-\$7.49	\$33.5m	▲ 3%
< \$5.00	\$594.1m	▼ -11%

Top 5 markets by value

United Kingdom	\$214.1m	▼ -4%
United States	\$197.1m	▼ -23%
Canada	\$67.6m	▲ 4%
Mainland China	\$28.7m	▲ 16%
Denmark	\$16.2m	▼ 0%

