Wine Australia



Annual Operational Plan 2026–27



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

We pay our respects to Elders past and present, and extend that respect to all Aboriginal and Torres Strait Islander peoples.

Responsible Minister



The Honourable Julie Collins MP

Minister for Agriculture, Fisheries and Forestry



Senator the Honourable Anthony Chisholm

Assistant Minister for Agriculture, Fisheries and Forestry

Board



Dr Michele Allan AO

Chair and Non-Executive Director (Victoria)



Dr Angeline Achariya

Non-Executive Director (Victoria)



Ms Roslyn Baker

Non-Executive Director (Queensland)



Mr Andrew Kay

Non-Executive Director (South Australia)



Ms Elizabeth Riley

Non-Executive Director (New South Wales)



Ms Peta Slack-Smith

Non-Executive Director (Victoria)

Enabling legislation

The Wine Australia Act 2013

Representative organisation

Australian Grape and Wine

Independent Committee Chairs



Mr Geoff Knuckey
External Chair,
Audit and Risk Committee



Mr John Lloyd
External Chair, Portfolio
Review Committee

Chief Executive Officer



Dr Martin Cole
Chief Executive Officer

Senior Leadership Team



Dr Liz Waters
Chief Operating Officer



Shirley Fraser
General Manager,
Customer Engagement



Carolyn Mitchell
Executive Officer



Ned Hewitson
General Manager, Regulation
and General Counsel



Jay Jayeshwaran
Head of Business
Development & Strategic
Investments



Dr Paul Smith
General Manager,
Research and Innovation



Louise Mickan
Head of People and Culture



Paul Turale
General Manager,
Market Development



Bernadette Saberton
Chief Financial Officer
and General Manager,
Corporate Services

Contents

About Wine Australia and Australian wine	2
Introduction	3
Alignment of the *OGWSP* and Wine Australia's *Strategic Plan 2025–30*	4
Alignment of investments in 2026–27	5
Key investments in 2026–27	6
Funding and investment summary	7
Research and Innovation	8
Investment priorities for 2026–27	10
Market Development	14
Investment priorities for 2026–27	16
Regulatory services	19
Investment priorities for 2026–27	21
Enablers	23
Investment priorities for 2026–27	25
Delivering this plan	26
Investment priorities for 2026–27	27
Measurement and evaluation	28
Financial management and resource allocation	29
Compliance and governance	31
Funding agreement obligations	31
Performance principles	32
Balanced portfolio	34
Alignment with Government priorities	35
Risk management	36
Data governance and cyber security	36
Appendix	37

About Wine Australia and Australian wine

Wine Australia's functions, defined by the *Wine Australia Act 2013*, exist to better the knowledge, opportunities and excellence of the wine and grape sector's people, processes and products so that levy payers can remain profitable, resilient and sustainable. These are:

- **Research, Innovation and Adoption** to enhance global competitiveness, helping grape and wine businesses meet the challenges of tomorrow, today
- **Market Development** to increase the demand and premium paid for Australian wine across all markets by expanding market and promotion opportunities for Australian wine, and
- **Regulatory Services** to safeguard product integrity and uphold the sector's reputation by maintaining market confidence in the high standards expected of Australian wine.

In both prosperous and difficult periods, such as the challenging one the sector is currently navigating, we continue to innovate, diversify and safeguard the sector for the betterment of Australian wine and its people.

In response to the current challenges, our planning has an increased focus on extension, to help ensure the resources, tools and data that the sector needs for business decision making are delivered in ways that cut through and reach those who need them most. More consumer insights, accelerated development of the National Vineyard Register and building the Australian Wine Future Fund to bolster funding are also key areas of focus this coming year.

Wine Australia also has an obligation to respond to the Australian Government's priorities. Increasing the sector's productivity as part of national efforts is a related and mutually beneficial aim that underpins much of the activity and innovation we invest in. Seeking to leverage partnerships and co-investment wherever possible in this challenging operating environment, we aim to drive levy dollars further and maximise returns to those paying them.

Australia has more than 200 years of viticultural history and grows more than 100 different varieties in a diverse range of climates. With a projected average annual grape production of around 1.25 million tonnes, Australia is in the top ten largest wine grape producing countries.

The Australian wine industry is a significant contributor to the national economy, with an estimated annual value of $51.3 billion[1], generating economic benefits beyond its direct output, supporting 200,000+ jobs in agriculture, manufacturing and tourism, most of them across Australia's 65 wine growing regions.

The sector is dominated by large businesses, with around 30 wineries accounting for at least 75 per cent of total Australian wine production. Almost 60 per cent of Australian wine production is exported each year, with a total value of $2.28 billion as at the end of March 2026.

1 Full report available here: Australian wine's economic contribution | Wine Australia.

Introduction

In 2020, the Australian grape and wine sector united to chart a course toward a profitable, productive, resilient, and sustainable long-term future, encapsulated in the *Vision 2050* document. The collaborative vision articulated by *Vision 2050* remains clear – Australian wine: enjoyed and respected globally – and this is the vision that continues to guide our strategy.

Since 2020, the landscape has shifted significantly. The well-documented challenges of the last six years have been exacerbated by declining consumption, a significant oversupply, emerging input cost increases due to the war in the Middle East and gradually worsening climate risks. This remains a very difficult operating environment for wine businesses, and, conscious of these conditions, Wine Australia is committed to providing the tools and information needed to support business decisions.

Wine Australia has not been immune to these challenges, and since 2020 has itself significantly reduced staffing levels (~30%), closed a number of offices and restructured. This year, we will not only be making judicious use of reserves, but also funding a number of initiatives through the alternative investment models available within the Australian Wine Future Fund.

Given the extent of the challenges, in 2023–24, Wine Australia collaborated with Australian Grape & Wine (AGW) and other groups in an extensive 12-month sector consultation culminating in the launch of the *One Grape & Wine Sector Plan (OGWSP)* in August 2024. The *OGWSP* outlines the sector's collective priorities and the actions needed to help reset and rebound towards achieving the prosperity and success outlined in *Vision 2050*.

Addressing the priorities identified by Australia's grape growers, winemakers and exporters, the *OGWSP* sets out the roles, responsibilities and actions we, and other sector partners, will be accountable for over the next five years to improve the resilience and profitability of the sector and support solutions to the complex problems facing it.

Additional consultation with representative groups focussed on the specific issue of the oversupply of red wine grapes in the inland wine regions and led to the *Grape and Wine Sector Long-term Viability Support Package* from the Department of Agriculture, Fisheries and Forestry (DAFF), which now totals $4.88 million and supports projects that are addressing this from various angles.

Wine Australia's *Strategic Plan 2025–30* was developed on these and other forms of engagement with stakeholders and has a strong emphasis on leadership, collaboration, and accountability, providing clear actions and milestones for Wine Australia that support the sector to adapt, thrive, and achieve its long-term goals.

For Wine Australia, success relies on continuous engagement, listening to and monitoring conditions across the sector, and making prudent investments to secure the future of Australian wine. The *OGWSP*, and by extension, our current *Strategic Plan 2025–30*, was developed to respond to the oversupply problem as well as future needs. These issues and needs still exist, and these plans are still in line with the requirements of the current environment. That we are focussed on the right things is critical, and feedback from multiple sources continues to tell us our actions and focus reflect stakeholder feedback.

This *Annual Operational Plan 2026–2027* outlines the investments we will make in the second year of the *Strategic Plan 2025–30* to address the *OGWSP* priorities falling within our remit.

Alignment of the *OGWSP* and Wine Australia's *Strategic Plan 2025–30*

Figure 1: The actions of the *One Grape and Wine Sector Plan* allocated to Wine Australia

Wine Australia's core functions under the Act	Our place and product	Our markets	Our consumers, customers and community	Our sustainability	Our people	Our systems and infrastructure
Research and Innovation	Balance supply and demand Improve our wine with innovation			Future proof our supply base Putting the sector's ESG and sustainability plans into action Embrace sustainability and aim for continuous improvement in practices	Develop skilled and capable people Enable practice change	Embrace digital, data and tech transformation, enable end-to-end data models and ensure access to information
Market Development		Diversify and intensify our international markets Enhance the perception and consumer appeal of our wine	Respond to our customers and consumers	Promote sustainability responsibly in our marketing efforts		
Regulatory Services		Improve international market access				Ensure product integrity and quality
Enablers						Unlocking opportunities for investment
Leadership	Risk management Measurement and evaluation	Governance Resource allocation	Financial management Customer engagement	Data management and cyber security Alignment with Government priorities	People and culture	

Alignment of investments in 2026–27

Figure 2: Investments against the *OGWSP*

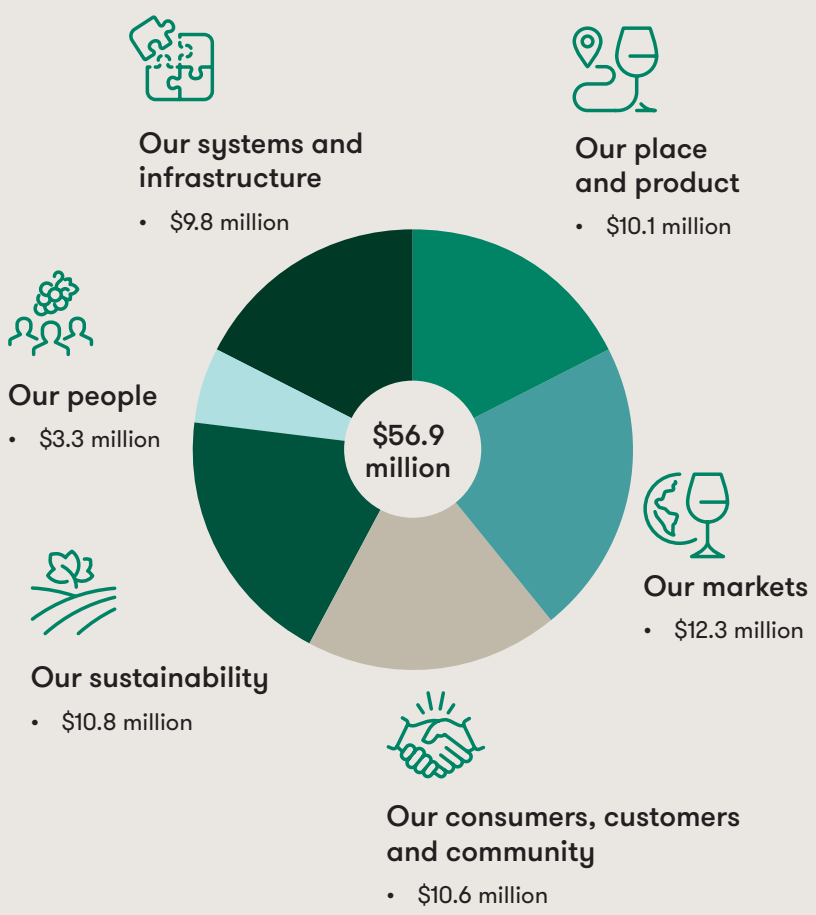
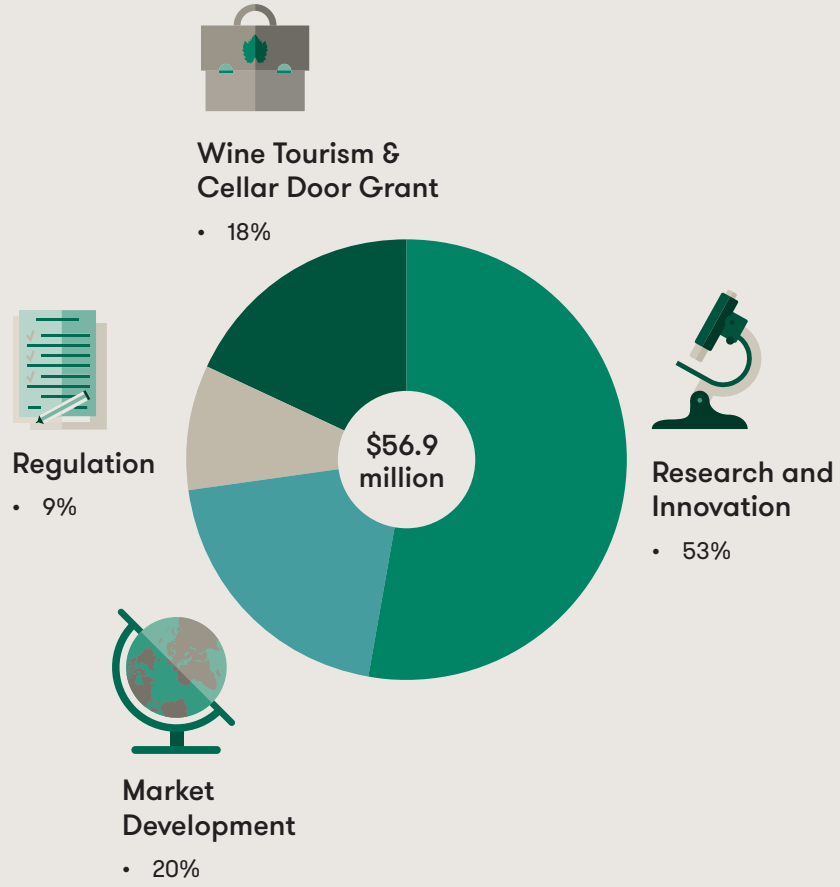


Figure 3: Investments against Wine Australia's functions



Key investments in 2026–27

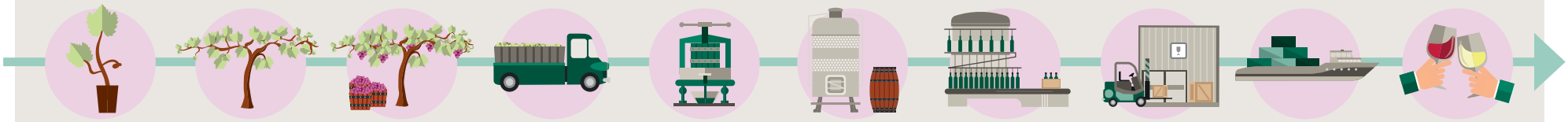
Figure 4: Key investments 2026–27

- The Wine Australia National Germplasm Collection Program
- Wine Industry Smoke Detector (WISD) tool
- Circularity solutions for CCA posts
- Sustainable management of climate change impacts, pests and diseases and biosecurity threats
- The National Vineyard Register

- Wine process optimisation
- Product innovation targeting wine quality and style

- In-market representation in North America, the United Kingdom, Japan and China.
- Activities in China, Japan, Europe, North America and Southeast Asia and signature events at Wine Paris, and Vinexpo Asia (Hong Kong)
- Positive perception built through existing Australian Wine Discovered educational assets, leveraging third-party educators and the 2027 International Masters of Wine Symposium in Adelaide
- The Wine Tourism & Cellar Door Grant
- Improvement and streamlining of regulatory processes through integrating, leveraging, improving, and modernising existing systems

Grape production | **Wine production** | **Sales and export**



Entire chain

- New vineyard practices and winemaking techniques so that the sector can innovate and produce wines that resonate with consumers
- Relevant consumer and market insights to support product development initiatives (such as 'lighter lifestyle' wines) and market activations
- Changes to emissions since the release of the *Emissions Reduction Roadmap*
- Support for improvements to the Sustainable Winegrowing Australia (SWA) program

- Integration of SWA messaging into marketing activities
- Regional and national mentor and leadership programs
- Continuous improvement in extension and adoption efforts to facilitate practice change
- A refreshed and optimised Wine Australia website for improved customer engagement with our services, resources, investments and activations
- AWRI Helpdesk, 'Dogbook' and Information Services

Funding and investment summary

Figure 5: Funding and investment summary



* includes Research Contributions for Future Fund and Wine Australia reserves

Research and Innovation

The *OGWSP* themes addressed by Wine Australia's Research and Innovation function are:

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.

Our sustainability

Sustainability is central to our sector's current and long-term resilience, profitability and success. Through an environmentally considerate and socially responsible sector, global market access is maximised, business costs are reduced and trade and production risks mitigated. Our sector aspires to be recognised as a global leader, embedding progressive environmental, social, and governance (ESG) practices to enhance the resilience, productivity, profitability, and longevity of the sector.

Our people

Our sector is a respectful and inclusive community that fosters diverse leadership and rewarding careers and provides the knowledge and skills to build resilient businesses.

Our systems and infrastructure

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



Wine Australia empowers sector success through research and innovation that enhances global competitiveness, helping grape and wine businesses meet the challenges of tomorrow, today.

With climate and profitability challenges and wine increasingly having to compete with other alcoholic beverage categories as consumer and market preferences evolve, continued investment in innovation is more critical than ever. Addressing technical, research and extension challenges – such as the development of appealing new wine styles, reducing vineyard input costs, mitigating biosecurity risks, reducing carbon emissions and increasing wine business productivity and competitiveness in a tough global market – is essential for the long-term sustainability and viability of the Australian wine sector.

Aligning future production with market demand to balance supply and demand was the single most critical challenge identified in consultations during the development of the *OGWSP*. It is evident that the sector requires urgent support in this area. Wine Australia will continue to provide the data, analysis and tools to support the balancing of supply and demand and aim to communicate these more widely via a range of channels, including flagship reports, market bulletins, dashboards, webinars, media releases and articles and regional and national presentations. Our National Vintage Survey and Dashboard and the Production, Sales and Inventory (PSI) Survey for supply side data will soon be supplemented by the establishment of a National Vineyard Register to provide planting information by region and variety. Ensuring the sector has access to the most relevant and trusted data and insights to inform business decision making will deliver increased resilience.

Australia's climate continues to change and present challenges in managing vineyards. Building our climate resilience through practices that protect Australia's viticultural assets and working to preserve and enhance the environment will require sustainable vineyard planning, climate-suitable varieties, clones and rootstocks, maintaining healthy vines, and managing pests and diseases. Wine Australia's investments in this area aim to provide grape and wine producers with greater flexibility and more options in responding to the effects of climate change, sustainably managing pests and diseases and meeting the challenges of biosecurity threats. Together, we will focus on reducing the sector's environmental impact in line with the Australian wine sector's *Emissions Reduction Roadmap* and with national emissions reduction targets.

Sustainability is not just about climate change adaption. Wine Australia's program of research and extension in this area also supports growers and producers to understand and action ESG-related activities that are aligned with business profitability, longevity, social licence and ensuring global market access. As the world increasingly embraces sustainability, organisations across many sectors are improving practices to meet changing customer and consumer demands. Businesses are already embracing eco-friendly practices, water conservation and renewable energy, while also focusing on social responsibility through fair labour practices and community engagement.

To this end, Wine Australia seeks to assist grape growers and winemakers to understand and respond to opportunities to increase data capture and storage in order to build business resilience and reduce costs. Greater uptake of existing technology, behaviour change, data capture and information disclosure are all required. By providing the sector with the tools and knowledge to make practice changes, businesses can meet and exceed market demands, reduce their costs, harness opportunities, mitigate risks and better capture and communicate their sustainability credentials, progress and achievements.

Wine Australia also continues to invest in a vibrant, dynamic and forward-thinking sector by building well-established networks of people at all levels across the sector equipped with the skills and desire to lead, inspire and navigate change, and attracting, supporting and retaining talent to benefit from a broader range of perspectives and expertise.

Finally, evolving our extension and adoption efforts to better align with the needs and issues of grape growers and winemakers and foster regionally owned solutions will maximise the potential for pooling resources and leveraging industry levies more effectively. The impact sought from Wine Australia's investment is that grape growers and winemakers across all business models and geographic regions will have access to the support and information they need to implement practice change in their business. They will have a greater appreciation of the personal and business benefits of practice change, the facts they need to inform better decision-making, and greater confidence and know-how to act.

Research and Innovation investment priorities for 2026–27

Table 1: Research and Innovation investment priorities for 2026–27

	Outcomes sought from Wine Australia investment through to 2030	2026–27 investments and activities
Balance supply and demand 	• A domestic sales dashboard is available to provide greater transparency on the sector's biggest market. • A national vineyard register is available to provide insights into winegrape supply. • Businesses can use data, information, and tools from Wine Australia and partners to make more informed planning decisions.	• Continue to offer in-depth data analysis covering wholesale and retail channels, and consumer insights specific to the Australian market, through the Domestic Sales Dashboard. • Launch the National Vineyard Register, delivering a geospatial repository for data on the area of bearing and non-bearing vines, varieties planted and location by geographical indication across Australia. It will provide supply data transparency to support producer decision making and assist in balancing supply and demand. • Continue to provide relevant data, information, and tools to help the sector plan pathways to a sustainable supply and demand balance and help businesses make informed decisions for a more resilient future.
Improve our wine with innovation 	• Technologies and innovations supported by Wine Australia's research or adoption projects are used by producers for vineyard monitoring and to support decision making. • Increased application of novel or new-to-them production approaches helps businesses to diversify into new product categories, supported by robust market size and opportunity data. • Businesses are empowered to take action to produce grapes and wines in new ways using knowledge and tools from Wine Australia investment and have demonstrated engagement with collaborative projects.	• Invest in the development of innovative new products to compete in product categories with increasing consumer demand, such as lighter-style and 'mid-strength' wines. • Invest in the development of new vineyard practices and winemaking techniques so that the sector can innovate to produce wines that resonate with consumers. • Explore new technologies along the value chain to improve quality and efficiency. • Provide information, insights and innovation that support the sector to align products, quality, and value with consumer and market demands. • Support intensification of existing markets and diversification to emerging markets for Australian wine, based on providing greater understanding of consumer and market trends. • Support regional associations to design and enhance local solutions for key challenges in viticulture, winemaking and business.

Table 1: Research and Innovation investment priorities for 2026–27

	Outcomes sought from Wine Australia investment through to 2030	2026–27 investments and activities
Future proof our supply base 	• Grape growers have knowledge about short-term adaptation strategies to manage and maintain vineyards in low-demand periods. • The sector has access to new tool and technologies to better predict, manage and mitigate the increasing risk posed by bushfires and smoke taint. • Australia's grape growers and winemakers have access to a wide range of grapevine varieties, clones and rootstocks that are climate-resilient and suited to sustainable vineyard practices • The sector has access to a toolkit of strategies for seasonal management of climate extremes and long-term adaptation to climate change, and • The sector is well-prepared to manage endemic and exotic pests and diseases through the establishment of strong cross-sectoral and government relationships, and by securing co-investment in critical biosecurity research and innovation initiatives.	• Support research into development and evaluation of new planting materials, including varieties, clones and rootstocks. • Continue to invest in the Wine Australia National Germplasm Collection Program to protect and preserve Australia's unique grapevine genetic resources, facilitate the supply of clean, true-to-type planting material to the sector and support propagation supply chain activities that build and strengthen sector resilience. • Share strategic climate adaptation information from the Bureau of Meteorology and other key Australian research bodies. • Develop a decision support tool for grape growers and winemakers which encompasses all existing knowledge to predict, manage and mitigate the increasing risk of bushfires and smoke taint. • Invest in the development of improved and/or innovative vineyard practices, and techniques to manage vineyard pests and diseases more sustainably. • Maintain and strengthen cross-sectoral and government partnerships to leverage funding and support biosecurity research, innovation, development, and extension efforts.
Putting the sector's ESG and sustainability plans into action 	• Australian grape and wine producers are provided with resources and access to training opportunities to capture ESG-related data and communicate business ESG outputs. • The majority of wine and grape businesses have established their emissions baseline and are aware of ways to reduce it. • Lower emissions alternatives to landfill are available for disposal of most vineyard waste. • Progress is made against the emissions reduction opportunities identified in the Emissions Reduction Roadmap, and toward agricultural and national targets. • Grape and wine businesses have adopted one or more initiative(s) to reduce their baseline emissions. • Sector greenhouse gas emissions (GHG) emissions have reduced by 42 per cent of the 2020–21 baseline, consistent with the Australian wine sector's *Emissions Reduction Roadmap*. • Carbon literacy and understanding of the collection and use of data and carbon calculators by the sector is increased. • The opportunities and benefits of low emissions practices are well understood throughout the sector.	• Support transition to practices that lower the sector's carbon emissions by 42 per cent by 2030, consistent with the Australian wine sector's *Emissions Reduction Roadmap* • Explore new practices and solutions to continue reducing emissions. • Share progress, challenges, and achievements related to emissions reduction efforts with the sector. • Investigate sustainable usage of, or low-emissions alternatives to, vineyard and winery inputs. • Increase adoption of best practice irrigation management. • Invest in the development of solutions for waste circularity and sustainable packaging. • Invest in the development strategies and practices to improve soil health, biodiversity and landscape management that improve measurable ecological outcomes. • Provide practical tools and campaigns to support effective implementation of sustainable practices in diverse business scenarios. • Support regional associations to design solutions for local challenges in viticulture, winemaking and business.

Table 1: Research and Innovation investment priorities for 2026–27

	Outcomes sought from Wine Australia investment through to 2030	2026–27 investments and activities
Embrace sustainability and aim for continuous improvement in practices 	• Australian grape and wine producers will understand the priority ESG needs of their customers and have the skills and knowledge to collect and provide basic ESG-related information, in order to maximise opportunities for the sale and distribution of Australian wine. • Guided by the *ESG Investment Plan*, the sector will have clear and established ESG focus areas that address customer needs and promote the benefits of Australian-produced grape and wine. • Australian grape and wine producers will be proactively managing ESG-related risks, with a focus on identifying exposure to and reducing risks across wine supply chains. • The sector will adopt activities that further advance its reputation as a producer of socially and environmentally responsible grape and wine. • Australian grape growers will have the tools and knowledge to successfully calculate Scope 1, 2 and select Scope 3 emissions through sector-specific tools and extension and adoption programs developed by Wine Australia. • Australian grape and wine producers adopt practices, technologies and behaviour change that lead to productivity and efficiency gains and reduce the impact of grape and wine production on the environment.	• Encourage the use of science-based ESG metrics to enable Australian wine businesses to consistently measure, validate and report their sustainability credentials in accordance with globally recognised standards.
Develop skilled and capable people 	• Cross-sectoral projects addressing workforce and labour issues across agriculture have identified priority initiatives and been initiated. • The sector's understanding of workforce challenges is enhanced, DEI efforts across the sector are understood, and a toolkit for the sector to focus their DEI efforts is available. • Youth engagement across the sector is supported and we are seeing greater involvement of young people in decision-making processes. • The future workforce needs of the industry continue to be bolstered by a talented and diverse cohort of individuals making a difference across the regions and in wine businesses.	• Provide career pathways information and promote the grape and wine sector as a career of choice among school and tertiary students. • Work with the school, vocational training and higher education sectors, as well as government-funded and other initiatives addressing workforce and labour issues across agriculture. • Invest in activities to attract and retain skilled and semi-skilled people in all areas of the wine sector, ensuring an experienced and capable workforce. • Deliver regional and national mentor and leadership programs, such as Wine Australia's Future Leaders and Next Crop programs, to ensure equal opportunities for regional leadership development pathways and career advancement. • Maintain a commitment to research and activities aimed at achieving DEI across the sector and ensure diversity and inclusivity in mentoring and leadership programs.

Table 1: Research and Innovation investment priorities for 2026–27

	Outcomes sought from Wine Australia investment through to 2030	2026–27 investments and activities
Enable practice change 	• An enhanced understanding of who grape growers and winemakers turn to for information and advice and what support is needed to drive practice change in the grape growers and winemakers they influence is available and being used to improve their impact and outcomes for those they influence. • Data has been collected that articulates the primary motivators and barriers to practice change across the key grape grower and winemaker segments and is used to inform and enhance our extension and promotion activities, improving their impact and outcomes for the sector. • Enhanced practice change occurs for players along the adoption decision-making chain because greater value will be delivered through a nationally coordinated approach to activities and resources, designed to facilitate practice change.	• Continually improve extension and adoption efforts through collaboration and consultation with grape growers and winemakers. • Facilitate practice change and the adoption of existing knowledge to improve grape growing, winemaking, exporting and running a wine business, acknowledging that financial constraints can hamper uptake. • Identify and support activities to increase innovation and profitability in wine businesses.
Embrace digital, data and tech transformation, enable end-to-end data models and ensure access to information 	• The sector's requirements for managing and engaging with digital solutions and data opportunities will be clarified and used to design and implement use case examples. • The sector will have use cases to demonstrate the value of new digital technologies; these will be well-known, and activities and materials to support digital capabilities within the grape and wine sector's workforce will be available and used. • The value chain associated with the sector will have access to data platforms that reduce duplication, support a whole-of-industry data perspective, and reveal new insights and opportunities to inform decisions to improve productivity and profitability.	• Launch the National Vineyard Register, delivering a geospatial repository for data on the area of bearing and non-bearing vines, varieties planted and location by geographical indication across Australia. • Support the development of world class digital and data systems and technology that are fit-for-purpose, integrated and efficient. • Develop and implement a central register for the collection and storage of data related to the identity, location and health status of Australian grapevine propagation assets and to the grapevine varieties, clones and rootstocks available to the sector. • Develop activities, including demonstrations, trials and skills development, and build clarity around return on investment to support increased adoption of best practice technologies in vineyards and wineries.

Market Development

The *OGWSP* themes addressed by Wine Australia's Market Development function are:

Our markets

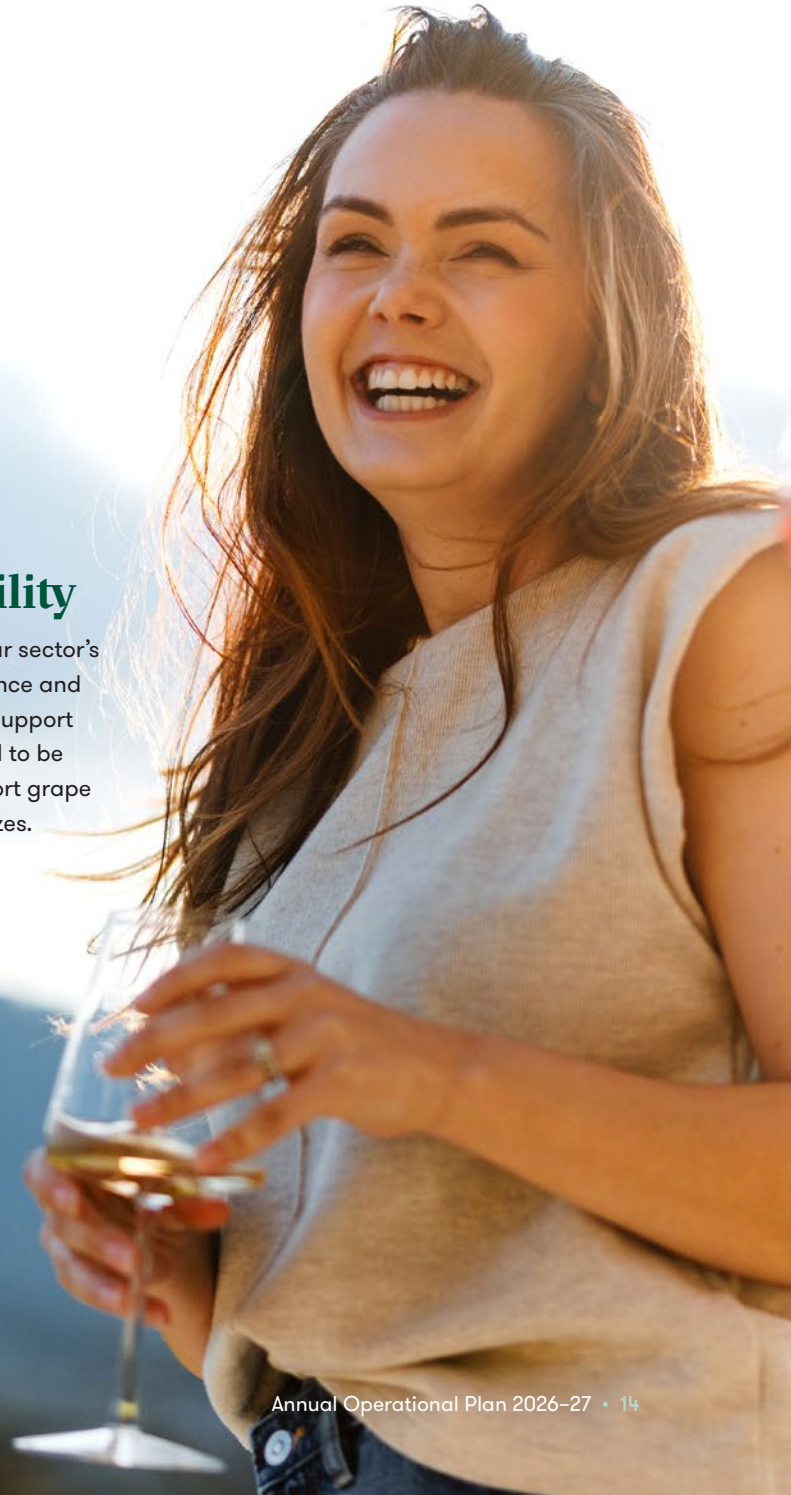
Our sector needs to increase its international distribution footprint and market penetration while defending its position in the domestic market.

Our consumers, customers and community

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

Our sustainability

Sustainability is central to our sector's current and long-term resilience and profitability. Programs that support sustainability initiatives need to be flexible and tailored to support grape and wine businesses of all sizes.



Wine Australia empowers sector success through our market development initiatives that uncover, develop and promote market opportunities globally. Wine Australia does not sell wine.

Our market development investments focus on delivering **Insights** while building **Connections** and **Capability**. Our objective remains to work with the sector, to facilitate outcomes that increase the demand and premium paid for Australian wine.

In 2026–27 we will continue to do this by providing relevant insights to enable better fact-based decision-making and facilitating opportunities that assist wine businesses to foster and cultivate connections that deliver commercial outcomes. Building sector capability through education and tailored market activations to increase awareness, relevance and preference for Australia and Australian wine, we will concentrate our resources and efforts on opportunities that offer the greatest returns for the industry, guided by sector-led advisory groups such as the Joint Marketing Group.

Market diversification remains a strategic imperative. Wine Australia aims to help grow and defend Australian wine's market share by providing actionable insights and market development activities that satisfy our customers and benefit their businesses/brands.[2]

Wine Australia uses quantitative and qualitative data to categorise markets as 'emerging' or 'established' and uses these classifications to guide resource allocation and to tailor market development activity by market. We will focus on diversifying and intensifying our target markets, delivering meaningful and actionable insights to wineries that inform product development initiatives (such as 'lighter lifestyle' wines), leverage trends that unlock broader occasion-based consumption opportunities, aligned to market activations that meet evolving trade and consumer demands. In 2026–27, we will continue to focus on increasing Australian wine's international distribution footprint and market penetration while defending its position in the domestic market.

We will continue to enhance the relevance of Australian wine globally, using education to build foundations in emerging markets and preference in those that are more established. In 2026–27, Wine Australia will invest in activities designed to build positive perception and greater consideration of Australia's wine offer, leveraging existing Australian Wine Discovered (AWD) educational assets and building stronger connections through targeted subject matter experts and influencers.

Our goal remains to build global understanding of Australia's diversity – be that the 65 wine regions, the people who call them home or the quality wines that are produced from them. All market development activity is designed to build stronger affinity for – and connection to – Australian wine, understanding that these connections are the foundations from which commercial outcomes are achieved. In continuing to build the collective Australian wine brand, we will be working closely with state and regional associations to communicate the rich regional – and individual – brand stories that make Australia unique and foster greater understanding and appeal among global wine consumers for our continent of wine.

Notwithstanding significant economic headwinds impacting trade listing priorities and consumer behaviour relating to discretionary spending choices, research continues to indicate the importance of sustainability and ESG practices and values to global customers.

OGWSP consultation identified that the sector is committed to upholding the principles of sustainability and ESG, communicating them honestly and transparently to their customers. Throughout 2026–27, Wine Australia will continue to build on the opportunity that Sustainable Winegrowing Australia (SWA) provides to support the development of the Australian wine brand and will integrate SWA messaging into all marketing activities where appropriate.

Providing our customers with a deeper and wider evidential base allows them to respond to the changing tastes and habits of wine consumers, unlocking the emerging opportunities that will underpin the Australian wine sector's ongoing success.

2 Measurement: through aggregation of post-event surveys

Market Development investment priorities for 2026–27

Table 2: Market Development investment priorities for 2026–27

	Outcomes sought from Wine Australia investment through to 2030	2026–27 investments and activities
Diversify and intensify our international markets 	**Each year** • In emerging markets, the Australian wine sector's market share of imported wine – will grow in Vietnam and Philippines, and – will be maintained in Indonesia and Thailand. • In established markets, the Australian wine sector's market share of – premium imported wine will grow in the United States, Canada and UK/Ireland – commercial imported wine will be maintained in the United States, Canada and UK/Ireland, and of – all imported wine will grow in Denmark, Nordic monopolies (Sweden, Norway, Finland), Japan and China • In Australia, the Australian wine sector's market share will be maintained.	• Understanding the market and consumer opportunity continues to be the key to building share. In 2026–27 we will generate and disseminate relevant and usable insights for the sector to enable better decision making on market attractiveness, consumer wine drinking motivations and behaviours and new product development, including the introduction of a 'lighter lifestyle' category co-developed with the sector. • Continue strong collaboration with Austrade, AGW and state bodies to leverage Accessing New Market Initiatives (ANMI) funding support to fill capacity gaps, provide in-market expertise and commercial assistance to potential exporters and amplify market-facing activity. • Maintain direct in-market representation in North America, the United Kingdom, Japan and China and partner with Austrade posts in other locations to deliver market development activations, particularly in the Asia Pacific region. • Deliver in-market activity to engage, educate and excite trade and consumers, build understanding of Australian wine and enable commercial outcomes with local trade partners. – Roadshow activity in China, Japan, Europe, North America and Southeast Asia – Signature events at Wine Paris, Vinexpo Asia (Hong Kong) • Engage retailers, buyers, importers and other international trade to build the presence of Australian wine in targeted markets. • Build and enhance the '*We Make a Wine for That*' domestic marketing initiative to raise awareness and relevance of Australian wine in more drinking occasions.

Table 2: Market Development investment priorities for 2026–27

	Outcomes sought from Wine Australia investment through to 2030	2026–27 investments and activities
Enhance the perception and consumer appeal of our wine 	There will be an increase in the quality perception rating of Australian wine from the established 2025 base in the following markets: – Australia – USA – Canada – UK – Nordics – Japan – China, and – Southeast Asia: Thailand, Vietnam, Indonesia and Philippines	• We aim to continually increase perceptions around quality and diversity, delivering tailored programs to aid awareness, understanding and preference for Australian wine. – 2026–27 will enable us to track changes in perception in target markets against the baseline established in 2025–26. • Leverage the 2027 International Masters of Wine Symposium in Adelaide. – Proactively target key opinion leaders across established and emerging markets. • Supplement Wine Australia's Education Development Managers activity with a network of recognised in-market educators who can utilise translated AWD education modules to build understanding and greater affinity for Australian wine, after establishing and refining this model in China, Thailand, Indonesia, Philippines and Vietnam in 2025–26. • Generate relevant and usable insights for the sector to enable better decision making on product development, market attractiveness, consumer wine drinking motivations and behaviours. • Ensure that market development programs reflect the varied needs of the sector and the in-market opportunities available through leveraging the expertise and insights of the Joint Marketing Group.
Promote sustainability responsibly in our marketing efforts 	Australian wines will be recognised by international trade and consumers as sustainably produced, supported by established sustainability credentials that are recognised by key customers across the entire supply chain.	• Connect with engaged global customers to deliver SWA-themed activity that aligns with their commercial needs and builds awareness of the Australian wine industry's sustainability endeavours with their customers. • Continue to activate pilot programs as a proof of concept to build greater understanding and uptake across other markets and customers. • Collaborate with Australian Grape & Wine and the Australian Wine Research Institute on a sector engagement strategy for SWA. • Collaborate with other agriculture sectors and other grape growing and winemaking geographies to support recognition of sustainable practices. • Maintain the sector's accountability and transparency of practices through truthful marketing and communications. • Communicate the Australian wine sector's ESG commitments and credentials with a clear and consistent narrative across the value chain. • Incorporate key SWA messaging into AWD modules and activations.

Table 2: Market Development investment priorities for 2026–27

	Outcomes sought from Wine Australia investment through to 2030	2026–27 investments and activities
Respond to our customers and consumers	In-depth consumer and market insights on a range of established and emerging markets will be available for the sector to inform business decision making and research and innovation programs.	• Improve research, innovation and marketing efforts by involving key customers in the co-design process, gaining insights into their needs throughout the product development and marketing cycle. • Foster collaborative responses to consumer insights across the value chain. • Co-design research and innovation programs to align developments with consumer insights to attract new customers and expand market presence. • Provide accurate and up-to-date data, information and insights to the sector to supporting evidence-based decision-making. Deliver it to ensure maximum impact, including: – Market bulletins – Webinars – In-person events and presentations – Tailored conversations such as ‘Ask an Analyst’



Regulatory services

The *OGWSP* themes addressed by Wine Australia's regulatory function are:

Our markets

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

Our systems and infrastructure

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



Wine Australia empowers sector success through regulatory services that safeguard product integrity to uphold the sector's reputation, maintaining market confidence in the high standards expected of Australian wine.

Well-designed, fit-for-purpose regulatory settings – and compliance with regulation – is crucial for the continued success of our wine sector. Regulatory compliance underpins consumer health and safety, and confidence in the provenance of a product; it can also serve to facilitate trade by demonstrating product credentials to international markets.

Regulatory complexities and the dynamic nature of international trade and regulation present ongoing challenges to the profitability and growth of Australian wine exports. These are addressed by working together with the Australian Government and the sector (including Australian Grape & Wine and the Australian Wine Research Institute) to enhance market access by identifying and managing technical trade barriers and by investing in developing, enhancing and providing technical information to support negotiations. We aim to reduce trade impediments by communicating regulatory information to support the sector's success in global markets and by establishing mutually advantageous relationships in export markets.

Australia's wine export controls continue to be administered through Wine Australia's Licensing and Approval System (WALAS), which allows users to apply online for a licence to export, register products and apply for shipping approval, upload labels, edit shipping details, apply for export documents, manage associated exporters, make payments online, and manage account access.

In discharging our regulatory responsibilities in accordance with the *Wine Australia Act 2013* and *Wine Australia Regulations 2018*, we meet the Australian Government's *Statement of Expectations* and uphold the standards for regulator best practice. We remain focussed on continuous improvement and building trust, managing risks and maintaining essential safeguards while minimising regulatory burden, and leveraging evolving data and digital technology opportunities to support the Government's regulatory reform and productivity agenda.

In 2026–27, this will include assisting the Government implement actions associated with the introduction of a mandatory code of conduct for winegrape purchases by 1 January 2027.



Regulatory Services investment priorities for 2026–27

Table 3: Regulatory Services investment priorities for 2026–27

	Outcomes sought from Wine Australia investment over 2025–2030	2026–27 investments and activities
Improve international market access 	Enhanced market access for Australian wine in support of the Australian wine industry's export growth and diversification priorities identified in the *OGWSP* compared to the 2025 baseline.	• Provide information and insights to enable businesses to comply with export market regulations and make informed commercial and strategic decisions pertaining to export growth and diversification opportunities. • Collaborate with Australian Grape & Wine, the Australian Wine Research Institute and the Australian Government to reduce technical and non-tariff barriers to trade and streamline regulatory processes. • Continuously improve a market access strategy that sufficiently addresses emerging challenges and seeks to promote a fair-trading environment for Australian exporters. • Build and maintain relationships with counterpart regulators to develop a comprehensive understanding of the regulatory requirements in export markets, assist exporters to resolve specific market access issues, and deliver streamlined regulatory processes through this cooperation. • Support the Australian Government's negotiations for improved market access with accurate, timely and appropriate technical information.

Table 3: Regulatory Services investment priorities for 2026–27

	Outcomes sought from Wine Australia investment over 2025–2030	2026–27 investments and activities
Ensure product integrity and quality 	Australia's robust regulatory framework will continue to provide a solid foundation for success of the Australian wine sector. Fostering a "culture of compliance" within the Australian wine sector will continue to enhance Australian wine's reputation for authenticity and integrity.	• Ensure wide and timely access to information on market regulatory requirements and changes to support production and processes that align with standards and facilitate market access. • Improve capability and culture to build confidence in Australia's regulatory settings and ensure the appropriate management of related risks. • Maintain essential safeguards and seek to minimise regulatory burden. • Leverage data and digital technologies to support the sector through progressing three identified digitisation and reform opportunities to boost productivity and profitability. • Work productively with the Australian Government, Australian Grape & Wine and its committees, industry participants, and other stakeholders, throughout the review process and associate consultation for upcoming sunsetting of the *Wine Australia Regulations 2018* (Cth) – including by reconvening the Legislation Review Committee. • Continue to enhance WALAS and our export approvals processes in accordance with the priorities identified in the *OGWSP* and our obligations set out in the Australian Government's *Statement of Expectations*. • Continually review our regulatory activities and regulatory fee structure to ensure efficiency and enhance productivity. • Continue to use risk management principles to conduct sufficient analysis and Label Integrity Program inspections to provide confidence that the wine sector demonstrates compliance with Australia's regulatory settings. • Uphold Wine Australia's high standards of transparent and responsive communication.

Enablers

In enabling overall success, Wine Australia will also contribute specifically to the *OGWSP* theme of *Our systems and infrastructure*.

Our systems and infrastructure

Our sector needs additional funding resources to deliver important initiatives as outlined in this strategic plan. An important enabler is the ability to co-design with partners and unlock other sources of funds to achieve the desired speed, scale, impact and outcome of research activities.





Given the challenging economic environment, high input costs and the limitations of the current levy system, the *OGWSP* identified the urgent need to unlock additional investment for innovation. In 2025, Wine Australia developed the *Australian Wine Future Fund* to increase funding opportunities, create additional value, accelerate investments and deliver impactful solutions for the sector through two complementary streams:

- **Research & Innovation Fund:** a target of $35 million through to 2030 through external grants and partner co-investment, funding co-designed projects that deliver practical outcomes for vineyard performance, product innovation, sustainability and production efficiency.
- **Venture Investments Portfolio:** a target of $15 million through to 2030 through attracting private capital that will be strategically invested to address critical innovation gaps.

The *Australian Wine Future Fund* builds on existing research and innovation strategies and leverages changes to the amount of Commonwealth Government matching funding available to Wine Australia for research and innovation, which recently increased through an amendment to legislation.

The Research & Innovation Fund's co-investment model works in partnership with research organisations, private sector, state governments and industry representative associations. These investments will complement – not replace – existing levy-funded research. In 2025–26, $7.8 million of additional co-investment in research was committed through to 2030 via the Research & Innovation Fund mechanism. The Research & Innovation Fund is also intentionally pursuing strategically aligned grants, with or without Wine Australia co-funding. In 2025–26, $2.5 million was successfully secured.[3]

Grants and further investment will continue to be pursued in 2026–27.

The second mechanism of the *Australian Wine Future Fund* is the Venture Investments Portfolio. We have partnered with Tenacious Ventures and will invest $2.5 million of non-levy funds alongside Tenacious Ventures' existing funds and other investors towards a combined target of $15 million through to 2030.

In 2026–27 we will work with Tenacious Ventures to find, fund and support companies building impactful solutions with the potential to transform viticulture and wine production and strengthen the long-term resilience of the Australian grape and wine sector.

3 The Wine Tourism Cellar Door Grant program is additional to this

Enablers investment priorities for 2026–27

Table 4: Enablers investment priorities for 2026–27

	Outcomes sought from Wine Australia investment	2026–27 investments and activities
Unlocking opportunities for investment	• The Australian Wine Future Fund is established and co-investment secured, increasing the funding for research and innovation by at least $4 million per annum. • Research and innovation investments made through the Australian Wine Future Fund have been successfully commercialised and made available for adoption by the sector. • The Australian Wine Future Fund has realised up to $50 million in additional investment for the sector through co-investments and grants, resulting in a robust portfolio of innovation-led investments that are servicing the Australian wine sector.	• Identify grants, opportunities for co-investment and pursue collaboration with other agricultural sectors and the private sector for additional funding to action the sector's priorities through: – tendering for state and federal grants – partnering and co-investing in research with state primary industries, research service providers and the sector – identifying and pursuing open calls and tenders for innovation, domestically and globally, and – catalysing incubation, innovation and commercialisation through venture fund-related investments.



Delivering this plan

Leadership of a high performing team in a well-regarded organisation is critical to delivering against this Plan.

Delivery against the themes of the *OGWSP* allocated to Wine Australia depends on excellent leadership and corporate oversight, including:

- Governance
- People and culture
- Customer engagement
- Measurement and evaluation
- Alignment with Government priorities
- Risk management
- Data management and cyber security
- Financial management, and
- Resource allocation



Delivery investment priorities for 2026–27

Table 5: Delivery investment priorities for 2026–27

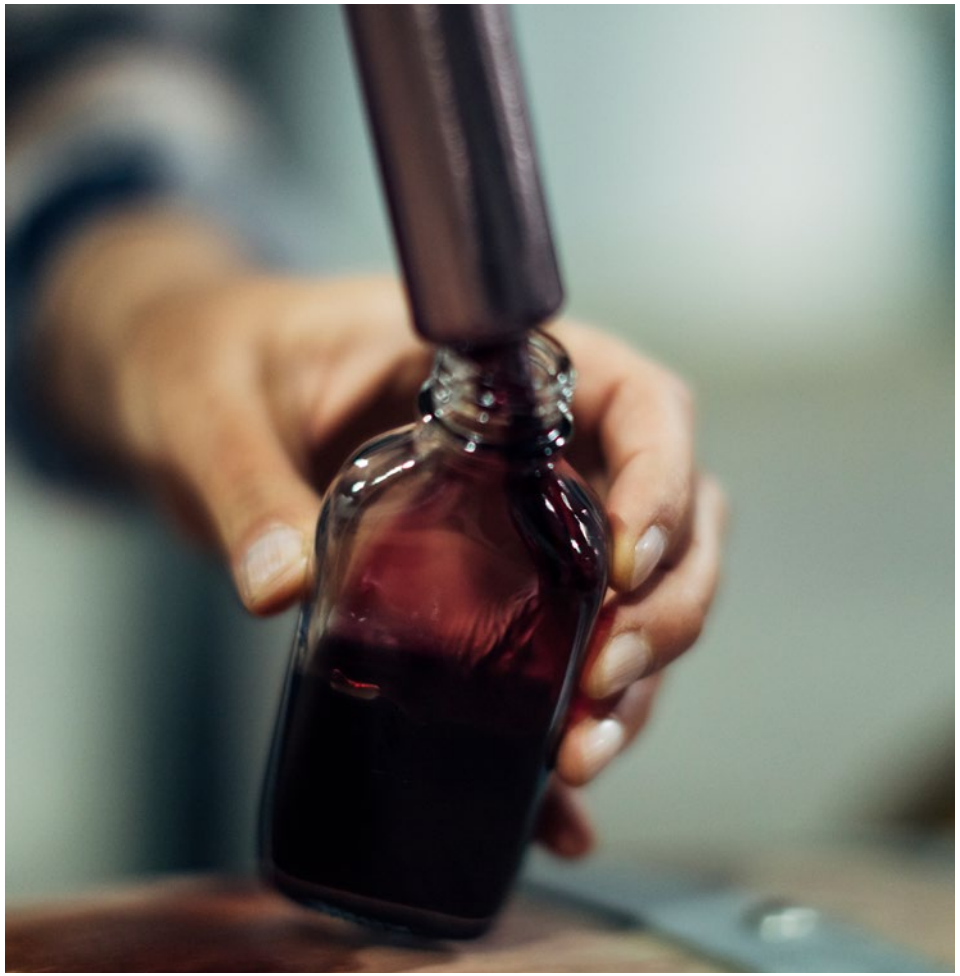
	Outcomes sought from Wine Australia investment over 2025–2030	2026–27 investments and activities
All *OGWSP* actions 	A high performing team in a well-regarded organisation delivers impact and value to the Australian wine sector.	• Customer engagement activities with all customers and industry stakeholders to support their connections to information, markets and networks and facilitate consultation and feedback to Wine Australia. • A refreshed and optimised Wine Australia website for improved customer engagement with our services, resources, investments and activations. • Professional development of Wine Australia staff to ensure they have the necessary skills to support the industry. • Delivery of the *Reflect Reconciliation Action Plan* and *Diversity, Equity and Inclusion Plan*. • Corporate services to ensure accountability, performance, risk management, cyber security, data management, privacy requirements and compliance with statutory obligations, including the *Wine Australia Act* and the *Public Governance, Performance and Accountability Act 2013*. • Board and Committee meeting arrangements, locations and support are provided to enable appropriate governance and oversight of Wine Australia's performance.

Measurement and evaluation

Wine Australia's performance, which we seek to improve year on year in the execution of our strategic and annual operating plans, is measured by the following metrics:

- We improve our customer satisfaction metrics from the June 2025 baseline, which were as follows:
  - The importance of Wine Australia's services to our customers: 8.3 (out of 10)
  - Customer satisfaction that Wine Australia is investing levies to deliver benefit to the grape and wine sector: 5.3 (out of 10)
  - Effectiveness of Wine Australia's customer engagement: 42%
- Sentiment regarding value and impact from research and innovation investments increases from the June 2025 baseline of 4.6 (out of 10).
- More than 70% of exhibitors (exporters/importers) participating in Wine Australia's marketing activities and events believe that their business/brand will benefit or already has benefited from participating in the activity.
- More than 62% of the sector uses Wine Australia's Market Insights information, services and reports and, of those who do, they rate their confidence in this information helping them make better business decisions as 6.7 (out of 10) or higher.
- Of the producers engaged in Wine Australia E&A activities
  - at least 65% understand the potential benefits to their business of adopting new, relevant practice changes or technologies, and
  - at least 16% have adopted these innovations.
- We achieve the key performance indicators in our Regulator Performance Framework.

Tailored measurement and evaluation plans are also included for the individual programs, activities and projects initiated under this Plan.



Financial management and resource allocation

Wine Australia is funded by grapegrowers and winemakers through levies and user-pays charges, and by the Australian Government, which provides matching funding for R&I investments.

We have four primary sources of funding:

1. **Research and Innovation (R&I) funding**
   The grape research levy (grapegrowers pay $2 per tonne of winegrapes crushed), the R&I component of the wine grape levy (wine producers pay $5 per tonne of winegrapes crushed) and additional cash contributions from partners are matched dollar-for-dollar by the Australian Government.[4] Additional cash contributions from partners and Commonwealth matching are the basis of the Future Fund.

2. **Market Development funding**
   Wineries pay the promotion component of the wine grape levy in a stepped amount per tonne. The promotion component is payable on grapes delivered to a winery once the threshold of 10 tonnes has been reached.

   Wine exporters pay the wine export charge on wine produced in and exported from Australia. The amount of levy payable is based on the free-on-board (FOB) sales value of wine for the levy year.

   Wine businesses and regional associations also pay voluntary contributions to participate in marketing activities (referred to as user-pay activities).

3. **Regulatory funding**
   Regulatory activities are funded on a cost-recovery basis through activity-based fees.

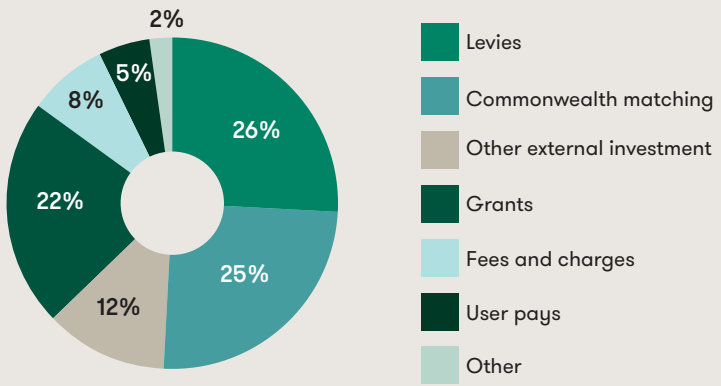
4. **Grants and other funding opportunities**
   Wine Australia applies for state and federal grants to support R&I, marketing and market access activities either directly or through partners.

4 Expenditure on eligible activities is matched up to 0.5% of the average gross value of production amount

Table 6: Estimated Revenue 2026–27

Estimated Revenue 2026–27	FY27
Levies	13,797,500
Commonwealth matching (incl Future Fund)	13,700,000
Other external investment (incl Future Fund)	6,470,030
Grants	11,649,000
Fees and charges	4,441,245
User Pays	2,717,778
Other	1,255,000
Total Income	**54,030,552**

Figure 6: Estimated revenue by type



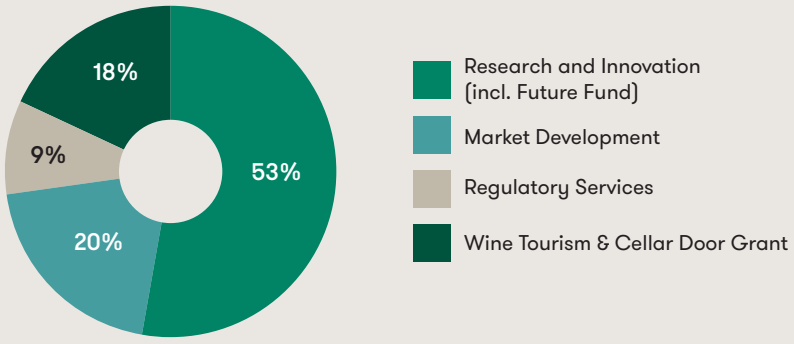
Wine Australia invests these funds to deliver its priorities as set out in this annual operating plan and the Wine Australia *Strategic Plan 2025–30*. Investments must be made in accordance with our obligations under the *Wine Australia Act 2013* and the *Public Governance, Performance and Accountability Act 2013*.

Income is invested in the three core functions, and other funded opportunities, to ensure we meet our obligations under these Acts and at the same time, deliver the key investments outlined in the *OGWSP* which informed the *Wine Australia Strategic Plan 2025–30*.

Table 7: Estimated Expenditure 2026–27

Estimated Expenditure 2026–27	FY27
Research and Innovation (incl Future Fund)	30,392,822
Market Development	11,472,728
Regulatory Services	5,027,545
Wine Tourism & Cellar Door Grant	10,000,000
Total Expenditure	**56,893,094**

Figure 7: Estimated expenditure by function



The financials shown are an indication of the decline in levies, while Wine Australia seeks to minimise the impact on the services provided to the sector when they are most needed.

Wine Australia's reserves, along with the 2025–26 expected surplus result from previously-held Commonwealth matching funding from DAFF, will ensure operation at current levels of investment for 2026–27.



Compliance and governance

Funding agreement obligations

Background

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

The *Statutory Funding Agreement* is complemented by the:

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

Incorporation of best practice principles in governance and reporting

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

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

Performance principles

The Funding Agreement obliges Wine Australia to act in accordance with specified Performance Principles and Guidelines. We demonstrate our performance against the Performance Principles and Guidelines to levy payers and other stakeholders by reporting against them in our Annual Report. The Performance Principles are summarised as follows:

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

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

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

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

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

The KPIs pertaining to the Performance Principles are set out in Table 8.

The Guidelines are:

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



Table 8: Performance Principle KPIs

Performance principle	KPIs
Performance Principle 1: Stakeholder Engagement	1.1 Strategy prioritisation and development processes include appropriate consultation plans, based on the *Best practice guide to stakeholder consultation*. 1.2 Demonstrated industry stakeholder engagement in the identification of RD&E priorities and activities consistent with the consultation plan in 1.1. 1.3 Demonstrated incorporation of industry stakeholder feedback on RD&E priorities and activities. Where incorporation is not possible, demonstration of feedback to a stakeholder
Performance Principle 2: Research Development and Extension (RD&E) activities	2.1 RDC investments align with strategic plans and have demonstrated outcomes to levy payers and taxpayers, including through growth in the industry, increased profitability of producers, commercialisation, access to new markets. 2.2 Levy payers who participate in RDC supported extension and adoption programs: – gain new knowledge or new information to improve their long-term profitability, productivity, competitiveness and preparedness. – intend to make or have made changes to existing practices by adopting the outcomes of R&D
Performance Principle 3: Collaboration	3.1 Completed, current and future R&D including commercialisation opportunities is accessible through the growAG platform. 3.2 Number and quantum of cross-industry and cross-sector RD&E investments available.
Performance Principle 4: Governance	4.1 Ongoing oversight, planning and reporting of investment activities is done in accordance with legislative and Australian Government requirements and timeframes. 4.2 Demonstrated management of financial and non-financial risk. 4.3 Relevant policies and procedures adopted and implemented (e.g., privacy etc). 4.4 Non-financial resources implemented effectively (Human resources, IT, IP etc).
Performance Principle 5: Monitoring and Evaluation	5.1 Impact (cost–benefit) assessment of a broad cross-section of RD&E [and marketing] investments undertaken annually. 5.2 Demonstrated consideration of and response to outcomes of monitoring and evaluation processes. 5.3 Transparent communication to stakeholders (including government) on the impacts and benefits of the RD&E and [marketing] activities.

In accordance with our *Statutory Funding Agreement* with the Australian Government, in 2023–24 Wine Australia engaged an independent consultant to undertake a comprehensive review of our performance against the Performance Principles (and Guidelines) in Section 9.2 of the *Statutory Funding Agreement* between July 2019 and December 2022.

The Performance Review made several recommendations, all of which Wine Australia agreed with and have now been actioned. The full Performance Review and Wine Australia's response is available on our website.

Balanced portfolio

Wine Australia, under its *Statutory Funding Agreement* with the Department of Agriculture, Fisheries and Forestry, must maintain a balanced portfolio of investments. The R&I portfolio of projects is balanced as shown in the tables below; the charts show the proportions by dollar value.

Table 9: R&I investment by project term

	Number of projects		Budget 2026–27 ($'000)	
Short (<2 years)	40	43%	8,393.1	38%
Medium (2–4 years)	32	35%	6,935.3	31%
Long (>4 years)	20	22%	6,927.9	31%
Total	**92**	**100%**	**22,256.3**	**100%**

Table 10: R&I investment by risk

	Number of projects		Budget 2026–27 ($'000)	
Low	53	57%	7,374.6	33%
Medium	31	34%	11,203.2	50%
High	8	9%	3,678.5	17%
Total	**92**	**100%**	**22,256.3**	**100%**

Table 11: R&I investment by research type

	Number of projects		Budget 2026–27 ($'000)	
Extension and adoption	19	20%	2,567.1	12%
Capability	32	35%	4,456.9	20%
Strategic	19	21%	8,063.3	36%
Adaptive	22	24%	7,169.0	32%
Total	**92**	**100%**	**22,256.3**	**100%**

Table 12: R&I investment by geographic focus

	Number of projects		Budget 2026–27 ($'000)	
Regional	29	32%	4,109.1	18%
National	63	68%	18,147.2	82%
Total	**92**	**100%**	**22,256.3**	**100%**

Figure 8: R&I investment by project term

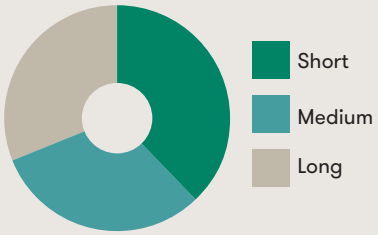


Figure 9: R&I investment by risk

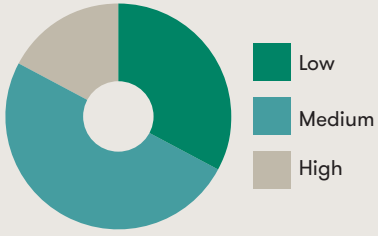


Figure 10: R&I investment by research type

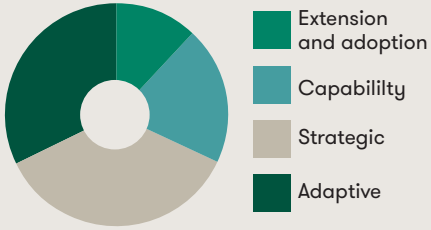
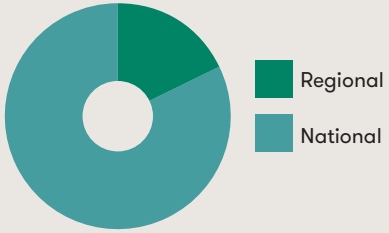


Figure 11: R&I investment by geographic focus



Alignment with Government priorities

This plan aligns with Australian Government and industry priorities for science, research and innovation.

Specific alignment of the Research and Innovation aspects of the plan with the Australian Government's Science and Research Priorities and National Agricultural Innovation Priorities is summarised below.

Table 13: Alignment with Government priorities

	National Agricultural Innovation Priorities	Science and Research Priorities
Research and Innovation		
Our place and product	Priority 1 **Trusted exporter**	Priority 1 **Net zero** Priority 4 **Environment** Priority 5 **Resilience**
Our sustainability	Priority 2 **Climate resilience** Priority 3 **Biosecurity**	Priority 1 **Net zero** Priority 3 **First Nations** Priority 4 **Environment** Priority 5 **Resilience**
Our people	Priority 1 **Trusted exporter** Priority 2 **Climate resilience** Priority 3 **Biosecurity** Priority 4 **Digital ag**	Priority 1 **Net zero** Priority 3 **First Nations** Priority 4 **Environment** Priority 5 **Resilience**
Our systems and infrastructure	Priority 4 **Digital ag**	Priority 1 **Net zero** Priority 4 **Environment** Priority 5 **Resilience**

Table 14: National Agricultural Innovation Priorities

National Agricultural Innovation Priorities	Number of projects		Budget 2026–27 ($'000)	
1. Australia is a trusted exporter of premium food and agricultural products by 2030	37	40%	$ 3,828.5	17%
2. Australia will champion climate resilience to increase the productivity, profitability and sustainability of the agricultural sector by 2030	35	38%	$ 8,248.8	37%
3. Australia is a world leader in preventing and rapidly responding to significant pests and diseases through futureproofing our biosecurity system by 2030	14	15%	$ 6,565.7	30%
4. Australia is a mature adopter, developer, and exporter of digital agriculture by 2030	6	7%	$ 3,613.3	16%
Total	**92**	**100%**	**$ 22,256.3**	**100%**

Table 15: The National Science and Research Priorities

The National Science and Research Priorities	Number of projects		Budget 2026–27 ($'000)	
1. Transitioning to a net zero future	5	5%	$ 1,778.4	8%
2. Supporting healthy and thriving communities	18	20%	$ 873.6	4%
3. Elevating Aboriginal and Torres Strait Islander knowledge systems	0	0%	$ -	0%
4. Protecting and restoring Australia's environment	16	17%	$ 7,011.4	32%
5. Building a secure and resilient nation	53	58%	$ 12,592.9	56%
Total	**92**	**100%**	**$ 22,256.3**	**100%**

Risk management

Wine Australia's risk management framework is aligned with and reflects existing standards and guidance such as *AS/NZS ISO 31000:2018 – Risk Management – Principles and Guidelines* and the Department of Finance *RMG-211 (Implementing the Commonwealth Risk Management Policy)*. This standard highlights key principles to frame the foundation for managing risk and should be considered when establishing the organisation's risk management framework and processes.

As good practice, Wine Australia has established a Risk Management Committee to ensure that a core leadership group review and have oversight of risks. This Committee reports to the Board's Audit and Risk Committee at each meeting.

Wine Australia engages with risk in our operating environment to deliver programs that are innovative, efficient, and dynamic. A positive risk culture promotes an open and proactive approach to managing risks.

Wine Australia is willing to accept higher levels of risk when the potential benefits outweigh the negative consequences of risks. In doing so, we demonstrate we have made informed, evidence-based and risk-based decisions.

Wine Australia acknowledges that identifying opportunities and capitalising on those opportunities to improve the overall performance of Wine Australia is a key component of meeting our corporate goals.

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

Wine Australia actively monitors its own internal financial and performance risks, as well as shared sector risks and emerging risks. Wine Australia holds a joint Industry Crisis Management Plan with AGW to support the sector in the event of fire, flood and market access issues, and works with industry and government bodies to support broader global and market issues.

Data governance and cyber security

Wine Australia activities and decisions are evidence-based and data-driven because they are supported by sound data governance and management practices. Wine Australia uses data governance processes to oversee the activities related to information, data, and records and to ensure there is accountability for information, data, and records.

Wine Australia is committed to safeguarding the confidentiality, integrity and availability of our information data, records and systems from cyber threats and vulnerabilities. We use a business-driven, risk-based approach to manage cyber security, we incorporate the key elements of the 'Essential Eight' at an appropriate maturity level and we implement controls in line with our risk appetite. Where there is a threat to our IT infrastructure, values or ethics or if the use of our IT presents a risk to cyber security, we take necessary action to mitigate the risks or address the behaviours.



Appendix

Contracted R&I projects as of 1 July 2026

Table 16: Contracted R&I projects as of 1 July 2026

Our place and product	
AWR 2601	AWRI Investment Agreement
ACC 2501	Provision of annual climate statistics for Australian GI regions
CSA 2401	Lower alcohol wine production through application of sugar reduction technology to grape juice
VHA 2601	Upgrade of Vinehealth Vineyard Register
Our markets	
TV 2502	Advisory services for venture investment opportunities
Market Access	Market Access EU Trade activities
Consumer Insights	Consumer Insights data
WAC 1912	Investigate market access impediments and opportunities for Australian wine by attendance at meetings of the International Organisation of Vine and Wine (OIV)
Market Insights	Market insights data
Our sustainability	
HIA 2301	Plant Biosecurity Research Initiative Phase III Collaboration and Funding Agreement 2023–2028
WA 2301	CRC SAAFE – Major Partners Agreement
AVR 2402	Best practice sampling and virus detection in Australian grapevine propagation assets
AVR 2401	Development and adoption of new tools for the surveillance and management of grapevine phylloxera
SAR 1701	Strategic Research Agreement

Table 16: Contracted R&I projects as of 1 July 2026

UA 2502	Vine Integrity and Security Collection pilot project – tissue culture and evaluation
UA 2503	Manufacturing of advanced green lixiviant from biomass resources for circular critical metal production and recovery
UQ 2401	Collaborative Research Agreement – ARC Training Centre in Predictive Breeding for Agricultural Futures
DPI 2501	Western Australia Germplasm Relocation Activity
HIA 2502	Biosecurity Trakka – near real-time diagnosis and monitoring for plant biosecurity threat
LTU 2003	North East Victoria vineyard smoke sensor network
LTU 2601	Production of smoke tainted wines as a research resource
WWA 2502	Western Australia lightweight bottle campaign
SGA 2601	Global scan of innovative crop protection technologies and access barriers for Australian plant industries
FOV 2501	National Grapevine Collection Coordinator
WA 2201	One Basin CRC Partnership Agreement
DPI 2201	NSW DPI evaluation of second-generation disease resistant grapevines developed by CSIRO
LTU 2501	Development, validation and scale-up of smoke taint prediction technology for the Australian wine industry and wine producers globally
CSA 2301-3	Durable pest resistant grapevine rootstocks and germplasm evaluation
CSA 2301-1	Enabling technologies for production of improved clones of existing premium winegrape varieties using 'DNA-free' gene editing

Table 16: Contracted R&I projects as of 1 July 2026	
SAR 2601	Advancing knowledge on crown gall pathogens and management in young vines
WWA 2501	Western Australia Sustainability Program
CSA 2301-2	Premium winegrape varieties with improved fungal pathogen tolerance and quality traits through gene editing
SWA 2501	Sustainable Winegrowing Australia (SWA) Program Governance and Funding Agreement
AWR 2601	AWRI Investment Agreement
Our people	
WA Ph2605	Remote sensing prediction of soil moisture and soil organic carbon in vineyards using machine learning and vision-language models
WA Ph2602	Novel uses of retentate derived from membrane filtration of wine
WA Ph2607	Developing innovative wine products using natural additives to meet changing consumer needs
WA Ph2502	Endophytes of indigenous grapevines as a novel source of biopesticides in viticulture
WA Ph2501	Elucidating the effects of environmental volatile compounds on red wine aroma and flavour, and evaluating the potential for novel cover crops in viticulture
WA Ph2407	Glycosyltransferases in grapevine secondary metabolism: Understanding and modifying their activity and selectivity
WA Ph2406	Characterising physiological, biochemical, and molecular traits in Shiraz grapevines of varying vine age in Barossa Valley
WA Ph2603	Sustaining premium australian wine: managing vine nutrition through conventional and alternative approaches to enhance fermentation and wine quality
WA Ph2604	Exploring the genomic basis of virulence in grapevine phylloxera
WA Ph2601	Investigating scale and mealybug control in Australian viticulture
WA Ph2606	Vineyard floor management – premium wine
WA Ph2503	Removal of toxic metals from discarded CCA treated timber

Table 16: Contracted R&I projects as of 1 July 2026	
WA Ph2401	Investigating novel germplasm solutions: Sensory characteristics and consumer acceptance of 1st generation mildew resistant varieties and gene-edited grapevines
WA Ph2504	Investigating the effect of shading on grapevine performance and wine quality under vitivoltaic systems
GRP 2303	Regional Plan – Tasmania 2023–2028
GRP 2309	Regional Plan – Queensland 2023–2028
GRP 2302	Regional Plan – Greater Victoria 2023–2028
GRP 2304	Regional Plan – SA North 2023–2028
GRP 2306	Regional Plan – Limestone Coast 2023–2028
GRP 2307	Regional Plan – SA Central 2023–2028
GRP 2305	Regional Plan – Murray Valley 2023–2028
GRP 2310	Regional Plan – Riverland 2023–2028
GRP 2301	Regional Plan – NSW and ACT 2023–2028
RWG 2501	Support for an Extension/Sustainability Officer in Riverina region
GRP 2308	Regional Plan – Western Australia 2023–2028
AWR 2202-3.2.7	Adopting autonomous vineyard tractors
PD 2601	GOTAFE Scholarship Program
WAC 2202	Acting as chairperson of the Research Advisory Committee of Australian Grape and Wine Incorporated
WAS 1902	Diversity in Agriculture Leadership Program
UA 2501	Further Afield Travel Scholarship
HIA 2302	Hort co-funding agreement – joint RDC extension project (LP22001)
WAP 2001	Wine Communicators of Australia (WCA) – Wine Industry Mentor Program
ASV 2402	ASVO Sponsorship Agreement – Awards for excellence and next generation student bursary programs
WAC 2503	2025 Next Crop Leadership Program – Queensland

Table 16: Contracted R&I projects as of 1 July 2026	
WAC 2501	2025 Next Crop Leadership Program – Barossa
WAC 2502	2025 Next Crop Leadership Program – Coonawarra
PD 2604	2026 Next Crop Leadership Program – McLaren Vale
PD 2603	2026 Next Crop Leadership Program – Hunter Valley
PD 2606	Tough conversations masterclass for Next Crop Coonawarra
WAS 1901	Primary Industries Education Foundation Australia (PIEFA) – Partnership
PD 2605	2026 Next Crop Leadership Program – Riverland
ASV 2401	Establish the Rootlings – national wine sector youth network program
WV 2501	Support for a technical and innovation lead in Victorian regions
WAC 2419	Future Leaders 2025 (Pragmatic Thinking)
Our systems and infrastructure	
CRRDC	RDC Collaboration projects through the CRRDC
Performance Evaluations	Project Performance Evaluations
AWR 2601	AWRI Investment Agreement

Provider and management codes

AGW	Australian Grape & Wine
ASV	Australian Society of Viticulture and Oenology
AVR	Agriculture Victoria
AWR	Australian Wine Research Institute
CRRDC	Council of Rural R&D Corporations
CSA	CSIRO Agriculture and Food
CSU	Charles Sturt University
DPI	NSW Department of Primary Industries
FOV	Foundation Viticulture
GRP	Wine Australia Regional Program
HIA	Hort Innovation Australia
LTU	La Trobe University
SAR	South Australian Research and Development Institute
UA	The University of Adelaide
UQ	University of Queensland
WA Ph	Wine Australia PhD Scholarship
WAC	Wine Australia consultancy agreements
WAP	Wine Australia Programs (e.g. Wine Communicators of Australia – Wine Industry Mentor Program and PIEFA – Curriculum development schools)
WAS	Wine Australia sponsorships
WWA	Wines of Western Australia

Australian Government

Wine Australia

Wine Australia

Cnr Botanic and Hackney Roads, Adelaide SA 5000
PO Box 2733, Kent Town SA 5071
Telephone: +61 8 8228 2000
Email: enquiries@wineaustralia.com
Website: wineaustralia.com

© Wine Australia
This work is copyright. Apart from any use permitted under the *Copyright Act 1968*, no part may be reproduced by any process without written permission from Wine Australia.

Disclaimer
Wine Australia, in publishing this document, is engaged in disseminating information, not rendering professional advice or services. Wine Australia, its authors and editors expressly disclaim any form of liability to any person in respect of anything done or omitted to be done by such person in reliance upon the whole or any part of the contents of this document.

Wine Australia supports a competitive wine sector by investing in research and innovation (R&I), growing domestic and international markets, protecting the reputation of Australian wine.

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