

BUILDING A PATHWAY TO PREMIUM WINE MARKETS AND CONSUMERS



WINES OF
WESTERN AUSTRALIA
Extraordinary Regions

WA - 11% @ \$9.23/litre
4.3 million litres

Barossa Valley - 28% @ \$16/litre
10.9 million litres

NZ – 71.5% @ \$8.10/litre
141 million litres

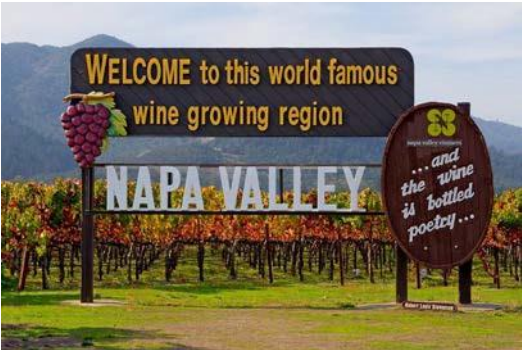
ONE-PAGE-SUMMARY: PRELIMINARY HYPOTHESIS

Context	Western Australia has built a diverse and innovative wine industry that is achieving critical recognition internationally
Trigger	However, Western Australian wines are currently underperforming relative to peers in export markets
Question	How can the Western Australian wine industry work together to improve its export performance?

Focus, Collaborate, Implement

Focus on key export markets	Collaborate with other producers	Implement global best practise
<ul style="list-style-type: none"> - Identify key markets with high growth metrics in the premium wine category - Focus on the key varieties where WA achieves premium on world market - Gain market presence with a critical mass of WA producers on shelves/wine lists at a significant volume 	<ul style="list-style-type: none"> - Conduct in-depth case studies into successful peer regions - Learn from peer regions who have successfully established regional reputation - Establish collaborative structures to allow producers to work together 	<ul style="list-style-type: none"> - Formalise collaborative structure and secure resources to implement - Implement strategy - Review, Revise, Repeat

There was strong, independent agreement among this group that Napa, Barossa and Central Otago were the regions with the most lessons for Western Australian regions



NAPA



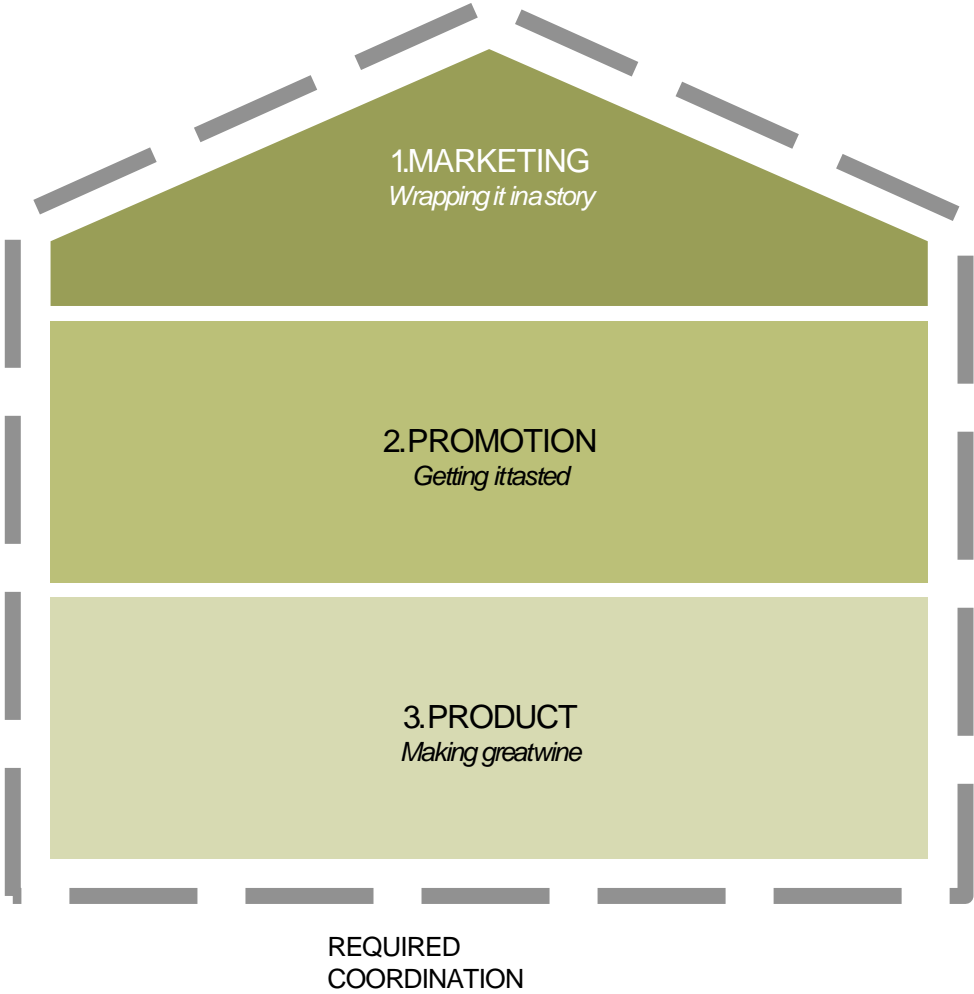
BAROSSA



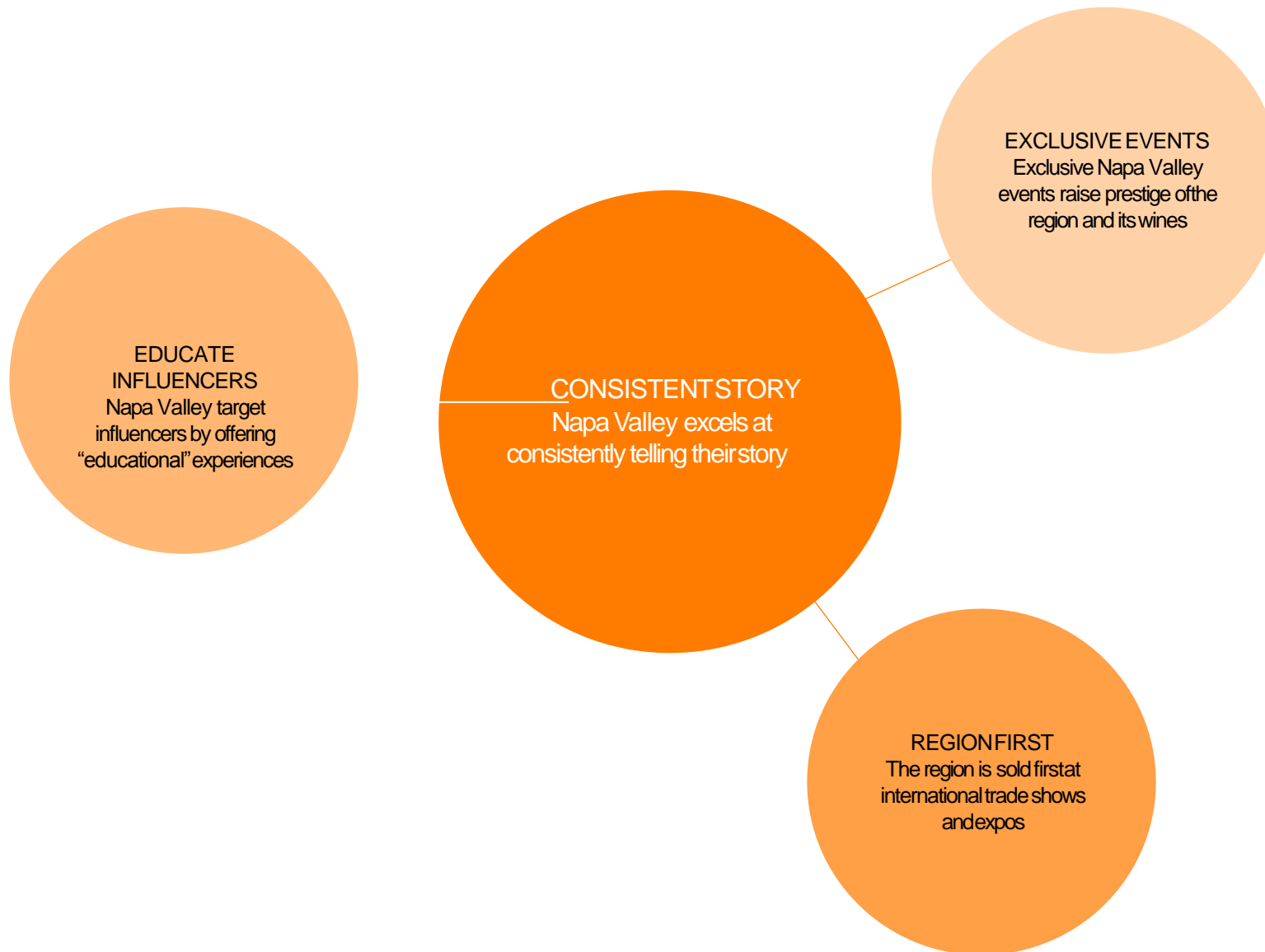
CENTRALOTAGO

PEER EVALUATION

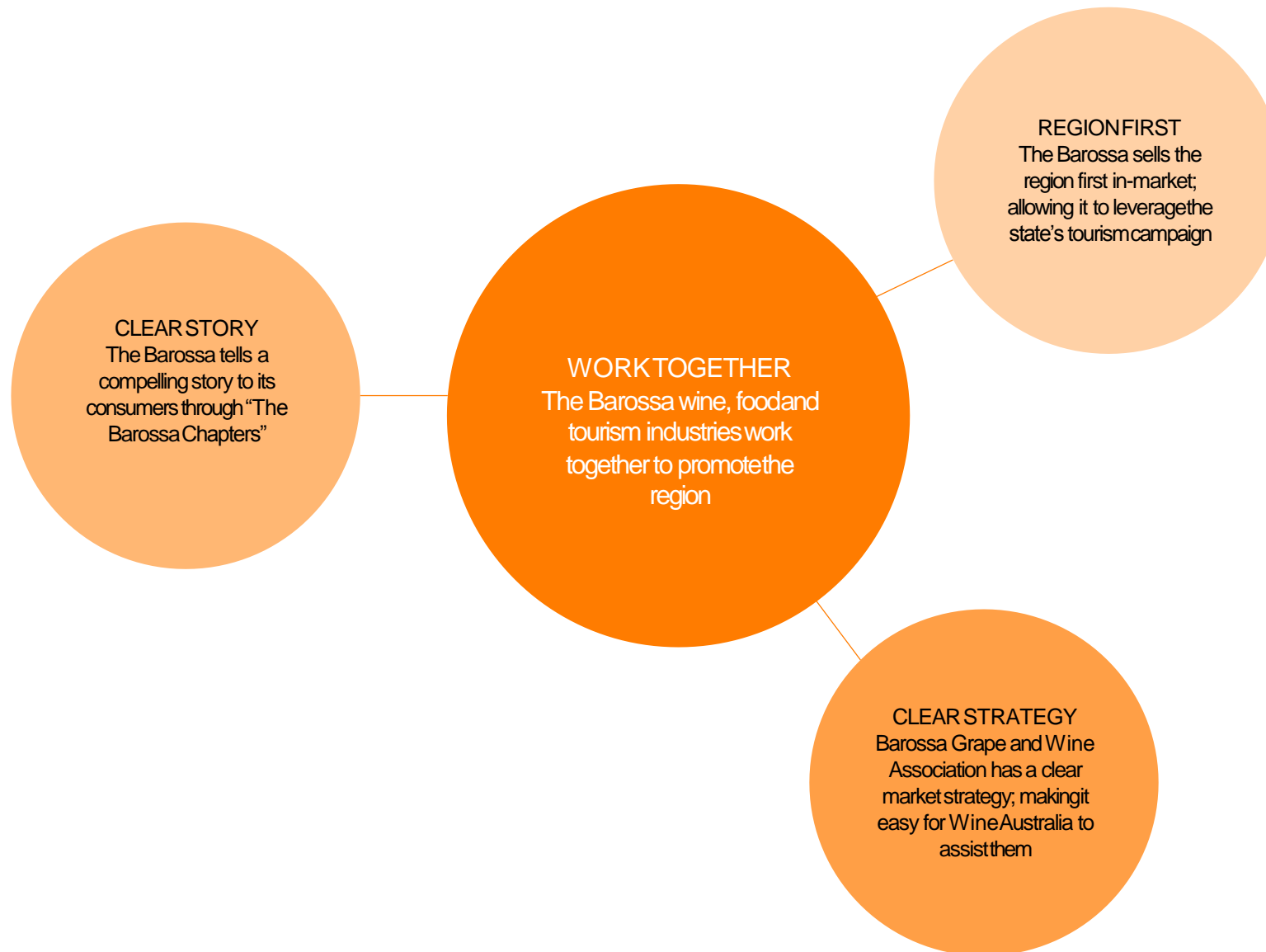
Successful regions undertake a range of activities which can be grouped under three broad areas



The Napa Valley tells and consistent story and has three further lessons for the wine regions of Western Australia

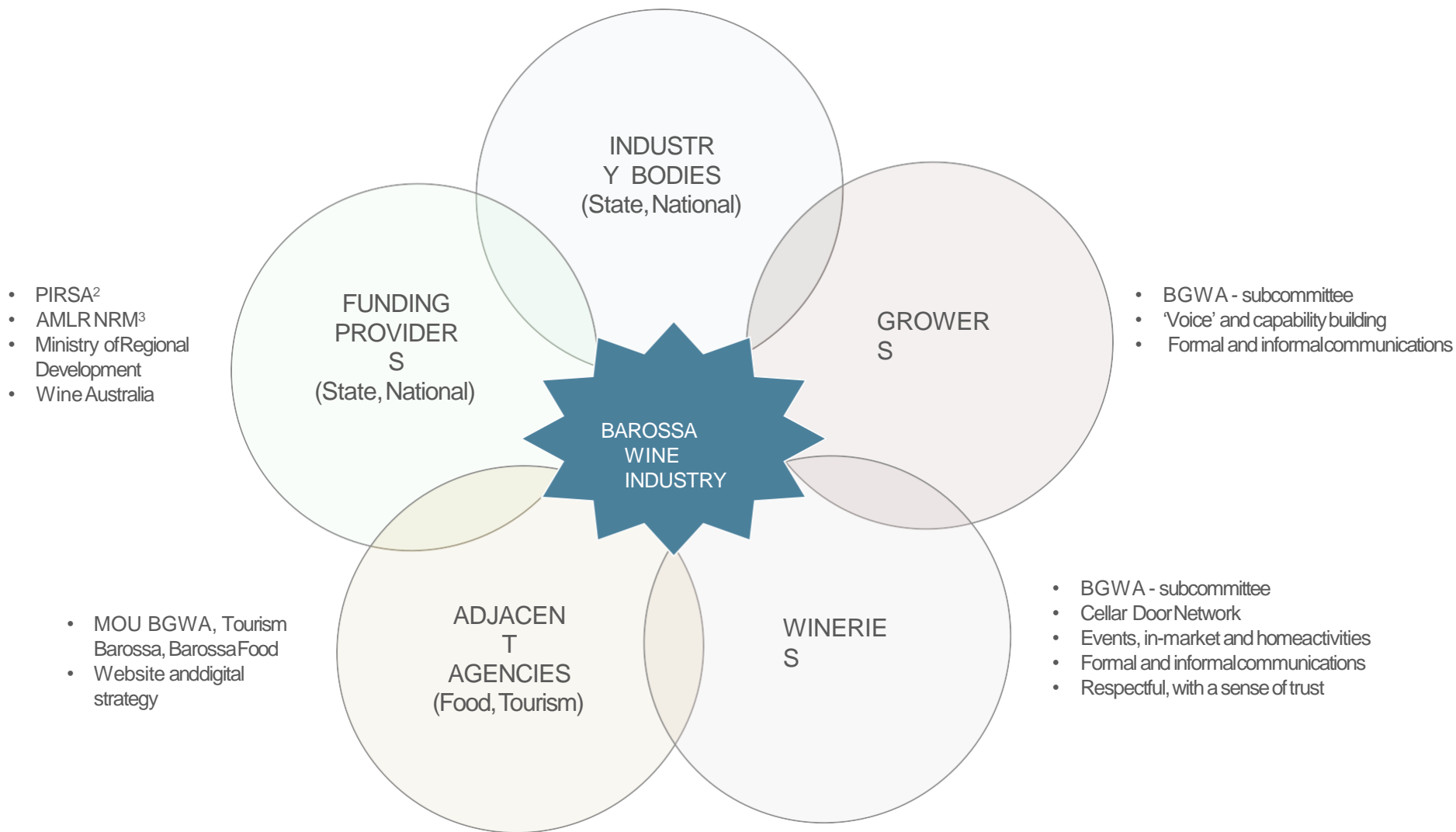


Working together is at the core of the Barossa, with three further lessons for the wine regions of Western Australia



Collaboration occurs at all levels

- BGWA¹ (strong governance, strong strategy, dedicated staff)
- Wine Australia (support)



1. Barossa Grape and Wine Association, 2. Department of Primary Industries and Regions South Australia, 3. Adelaide and Mount Lofty Ranges Natural Resources Management; Source: Industry interviews; Coriolis

Central Otago supports a single hero with three further lessons for the wine regions of Western Australia

