Murray Valley Winegrowers

MVW News & Views

Representing the Murray-Darling and Swan Hill wine regions NSW-VIC

June 2025
www.mvwi.com.au

Creating a moment for Australian wine

"We make a wine for that"

The Australian grape and wine sector is being called to rally behind an exciting new message that reframes how domestic consumers connect with Australian wine.

The message is clear, powerful and proudly local: 'We make a wine for that.'

This new campaign invites the entire wine sector, whether you are a producer, distributor, or seller, to join a shared effort to connect with Australian drinkers by celebrating the quality and diversity of Australian wine, and reminding consumers that whatever the occasion, there is an Australian wine that meets their needs. With alcohol consumption increasingly shaped by shared experiences, lifestyle rituals and a desire for meaningful connection, now is the time to ensure Australian wine is seen as a relevant option for the occasions that define today's culture.

From backyard BBQs and camping trips to celebrations and catch ups with friends, the idea is simple: no matter the occasion, there's no need to look further than our own backyard.

Insights from the IWSR Australian Wine Landscapes Report 2024 underscore the importance of the approach. Data reveals a shrinking wine drinking population, making it critical to retain existing consumers across a broader range of consumption occasions and re-engage those who have low category engagement or who are choosing alternative alcoholic beverages.

Developed by Wine Australia, the new campaign responds to clear sector feedback and delivers a key priority from the *One Grape & Wine Sector Plan*. Producers called for Wine Australia to champion Australian wine here at home, with a message the whole industry can stand behind to build domestic market share.

A campaign by the sector, for the sector

'We make a wine for that' is a category-led campaign designed for every winery, region, retailer, venue and brand. It's designed to align Australian wine with the moments that matter to spark local pride and consumer relevance. Businesses are encouraged to download the free campaign toolkit and begin planning events and activations that reflect occasion-based consumption; moments that bring the 'we make a wine for that' message to life in a way that fits their brand.

Dr Martin Cole, CEO of Wine Australia, says the campaign was developed in collaboration with the sector to elevate Australian wine as the beverage of choice for more alcohol-consumption occasions.

"Experts from the sector Joint Marketing Group (JMG) provided guidance and insight to support the development of the campaign and ensure it meets the needs of our very broad business types.

"Highlighting Australian wine's relevance for more occasions was clearly identified as a strong platform to build the campaign around. We already make world-class wines that belong in those moments, so this is our opportunity to remind people of that and give them confidence in choosing Australian wine.

"The real value here is relevance. Showing Australian wine as a relevant option for the moments that matter, with messaging that makes Australian wine feel familiar, local, and easy to choose. We encourage the sector to get behind this campaign, to amplify the message and impact purchasing behaviours for the benefit of the sector," said Dr Cole.

Continued page 8...

INSIDE

	Page
Vintage report	3
Grape Price Indicators	4
NOLO & NLM Wines	5-8
MVW Workshops	9
CCA posts potential	10
EPA burning warning	11
LMW Masterplan	14
MDBA update	15
NRAR compliance	16
Export Report	17

Notice Board

Keep up with the weather observations & Disease Alerts in your area

Be one of the hundreds that check the MVW website for weather observations throughout the Murray Valley region. Currently, MVW has 15 weather stations located around the district.

Located at: **www.mvwi.com.au**

GrapeWatch - It's Free for MVW members

The *GrapeWatch* disease alert system was in operation for the past growing season, with many growers registering to receive disease alerts directly to their smartphone, for predicted Downy Mildew disease events, and reminders for Powery Mildew control and management.

The *GrapeWatch* system replaces the former "GrowCare Disease Alerts" email communications that were sent following rain events, which are no longer available.

All growers on the MVW database that did not register for last year's *GrapeWatch* service have now been updated to be included in the service for 2025 (based on your vineyard location on our database – please contact MVW for your login details to gain access to the detailed platform, &/or check and change site specific information.

If you have any queries with *GrapeWatch*, please contact the MVW office.

MVW Annual Grower Database Survey

MVW is currently conducting a review of its grower database; We do this review annually to ensure statistics regarding the winegrape industry in the Murray-Darling and Swan Hill wine regions are accurate and current.

Information required includes updating your contact details, vineyard plantings, SWA certification, and general information about your source of irrigation water. In representing our region to Wine Australia, Government agencies, Agri-political bodies, and the media, MVW must take steps to obtain the most reliable information available.

Please note that your information will remain Private & Confidential and only aggregated information for all growers will be utilised within the industry.

Growers that respond to the survey by the 20th of June 2025 will go into the draw to win one of two $500 Visa debit cards.

If your contact and/or business details, or plantings have changed, let us know.

Even if your details haven't changed please let us know and enter the draw for a $500 Visa card.

The Federal Election and the Politics of it all...

MVW has previously reported that it has been heavily involved with various inquiries and submissions over the past year, which have included the following;

- Agricultural Ministers Taskforce *(Federal & State Viticulture and Wine Sector Working Group)*
- The Senate Inquiry *(The Senate Rural and Regional Affairs and Transport References (RRAT) Committee report into the Australian winegrape purchases code of conduct)*
- The Emerson Impact Analysis *(to lead an independent impact analysis of regulatory options for the Australian grape and wine sector)*

The Ag Ministers Taskforce provided $3.5M in funding, in June 2024 for the Grape and Wine Sector Long-term Viability Support Package (to boost demand, open new markets, provide better data, diversify products, and investigate competition and regulatory issues)

The Senate Inquiry provided a report containing several key recommendations for the Federal Government to consider, however this report has become nothing more than a political football and not much hope of it advancing following the Labor government victory at the recent federal election.

We hold most hope with the Emerson Impact Analysis, commissioned by the Federal Agriculture Minister in the Labor Government. Apparently the release of Dr. Emerson's report is imminent and we eagerly await his recommendations to bring greater balance and clarity to the wine industry supply chain.

In addition, MVW worked with Australian Grape & Wine Inc., Australia's peak industry body, to support a Pre-Budget Submission totalling $128 Million ($78 Million over three years to reinvigorate wine exports, $30 Million to support a sustainability package to assist growers, and a $20 Million domestic marketing initiative).

Disappointingly, the Albanese Government failed to deliver meaningful support to the grape and wine sector in the 2025-26 Federal Budget, the second major missed opportunity in as many years!

Murray Valley Winegrowers

iDC Murray Valley Winegrape Industry Development Committee

Murray Valley Winegrowers MVW News & Views

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2025 Vintage Report

Vintage 2025 has been one of mixed emotions for many winegrowers in the Murray Valley region. Perhaps happy that most have grown their crop with minimal weather and disease pressures, but unhappy that Red grape prices remain well below the cost of production, and many yearning for a more viable industry.

Before the commencement of the growing season, the industry message was that growers should not expect any meaningful improvement for Red varieties in 2025. With increased costs at vineyard level and cost-of-living pressures, growers should have carefully considered their options before committing to producing Reds in anticipation of 2025.

Conversely, demand and pricing for White varieties were expected to remain relatively stable.

Through the growing season, there were few weather events of note, and only a couple of disease alerts were issued through the GrapeWatch/ GrowCare platform – this is in stark contrast to the calamities of recent years.

Unfortunately, there were pockets of frost damage around the region, whilst this has not had a major effect on regional production it is devastating for those that have been affected – the situation is similar for variable spasms of storm and hail damage.

By comparison, the Murray Valley region fared much better than our two other inland counterparts – the Riverina being smashed by both frost and severe storms, whilst the Riverland incurred significant frost damage.

With the improved weather conditions came a drier year and the necessity to resort to more normal irrigation schedules, thankfully water costs were manageable, although massive increases in pumping expenses added to the continued drain on growers' financial reserves.

As is custom, early December saw price offers released by wine companies that are signatories to the Code of Conduct for Australian Wine Grape Purchases – some of the key players lowballed the market (as is the norm), providing a basis for others to follow at these less than satisfactory prices.

Fortunately, a few wineries bucked the system and were prepared to provide better outcomes across a range of both Reds and Whites. Growers needed this deliverance to provide some level of hope for their survival in the industry.

The misfortune of both the Riverina and Riverland may have influenced some of the improved conditions in the market locally; there was a turn of demand for some Reds and a generally more positive outlook for most varietal values, evidenced by the number of wineries seeking fruit in 2025 compared to recent years.

Generally, the improved demand translated into improved prices but unfortunately, Red prices were still below the cost of production, challenging growers' resilience to remain in the industry.

Approximately 25,000 tonnes of fruit was listed on the V2025 MVW Grapes for Sale Register by 59 growers (51% Whites, 49% Reds), compared to 27,000t (52% Whites, 48% Reds) / 69 growers in 2024. Most of the listed fruit was sold, with roughly 1,000t unsold at the end of harvest and around 750t removed due to unsatisfactory pricing and/or shrivel, quality issues.

The start of vintage on the 6th of January saw the industry in the full swing of harvest much earlier than is traditionally experienced in the region and with long and hot dry spells both growers and winery operations were tested. The usual vintage compression issues presented challenges for wineries that were trying to manage both Red and White intake simultaneously.

Of note, approximately 25,000t of fruit was diverted to non-wine products at low pricing but short payment terms.

Winemakers have indicated that while 2025 was challenging in terms of quickness (7-8 weeks instead of the normal 10 weeks), the high quality of the fruit will see some exceptional wines produced this year in the Murray Valley.

Of note, standout whites include Pinot Gris, Sauvignon Blanc, and Chardonnay, all presenting bright and fresh wines, exhibiting excellent varietal characteristics. Of the Reds, both Shiraz and Cabernet Sauvignon were the pick of the crop, with Cabernet, in particular, showing superb colour.

With regard to the regional crush, it is absurd in today's environment, we must wait until the release of the Wine Australia Crush Report in July to ascertain the crush for the Murray Valley region – based on communications with a broad array of regional contacts, there is a feeling the crush will be around the longer-term average of 350,000 tonnes, despite some mothballing and purging of vines.

What are grape prices likely to do in 2026?

By Sandy Hathaway, Wine Australia

It may feel as though vintage 2025 is barely over, but growers are already likely to be planning for the 2025-26 season and making decisions regarding vineyard management and grape production.

One of the most important considerations in your decision-making is of course what price you are likely to get for your grapes, and how that compares with the cost of production. Some growers may already know what they will get paid for their fruit next vintage, if they have an existing contract that specifies price, but many will not receive even an offer price until much later in the season, after the majority of input costs have been incurred.

How can you find out the indications for grape prices?

You don't have to wait for offer prices to find out the likely direction that prices will move next year. There are several sources of information that growers can use to get a good indication of what prices might be, or at least in which direction they are likely to move. The following are three of the best examples: all independent, free, trustworthy and relevant.

1. The price you received this year

It might be stating the obvious, but the price you received this year is the best guide to next year's price. Whether prices are trending up, down or staying flat, they are unlikely to move more than 10 per cent or so from this year's baseline, so you can work on this year's price as a good starting point. If you don't have a price from this vintage, or you are looking at selling to a completely different buyer, then you can also get a guide from the Wine Australia National Vintage Survey Dashboard, which will give you the average price by region and variety for the past 10+ years, as well as price dispersion (the range of prices, rather than just the average). The prices for the current vintage will be available from early July, which might be a bit late depending on the decisions you are making, but even looking at the published price from the year before and the long-term trend will give you a good indication.

2. The Wine Australia Grape Price Indicators Dashboard

The Wine Australia Grape Price Indicators Dashboard is a free online tool that provides a current summary of the key drivers of winegrape prices in Australian inland regions, as well as an indication of the expected direction for grape prices ahead of the next vintage.

Overall, there are 12 different sources of data all presented in one place on a number of charts in an easily accessible format that allows you to see at a glance how the indicators are trending.

The dashboard can be filtered by grape colour or the major varieties, so you can customise the information to be more relevant to you. An arrow on the summary page shows the overall direction of grape prices for the next vintage, based on the key indicators. This is a high-level summary that is averaged across all inland regions.

The arrow will point 'up' if the model calculates that average prices will increase by **at least 5 per cent** compared with the previous vintage average price (for the three inland regions combined). A 'static' arrow means that a change of less than +/- 5 per cent is indicated, and a 'down' arrow indicates a decrease of **at least 5 per cent.**

Scan the QR Code

Go to the Wine Australia Grape Price Indicators Dashboard. **https://marketexplorer.wineaustralia.com/grape-price-indicators**

The arrow is a good reference point but may not apply to individual growers' price offers. For example, it cannot account for non-market-driven arrangements such as:

- package negotiations where a lower price might be paid for a particular variety to compensate for taking more of, or paying a higher price for, a less-desired variety,
- prices that may be higher than the market rate but require a capped tonnage, or
- long-term contract prices that were fixed when market conditions were different.

It also cannot allow for sudden changes in market conditions such as newly-imposed tariffs.

The dashboard was developed by Wine Australia in consultation with inland grower representatives, with grant funding provided by the Federal Government to improve market transparency for Australian grapegrowers in the inland regions. You can use it to understand the market and navigate changing market conditions, save time by accessing all the information in one place, negotiate with increased confidence - challenging offer prices that are not consistent with the market signals shown on the dashboard, and ultimately make better-informed decisions for your business.

3. The ABARES independent grape price forecast

The Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) is the research arm of the Australian Department of Agriculture, Fisheries and Forestry (DAFF). It publishes a quarterly *Agricultural Commodities Report* with forecasts for the value, volume and price of Australian agricultural products, including winegrapes. In addition, ABARES provides forecasts for inland grape prices at the next vintage for the top six red and white varieties. This is an average for the inland regions, but again, the direction of the prices is a good indication of the overall trend.

What are the indications saying now?

As at May 2025, the indicator arrow on the Grape Price Indicators Dashboard has just been 'rolled over' to 2026. Based on the combination of indicators, particularly export average values, Ciatti global bulk wine offer prices and the stock-to-sales ratio for Australian wine, the arrow is currently indicating upward pressure on grape prices for the major inland reds (Shiraz, Cabernet Sauvignon and Merlot) in 2026 compared with the 2025 price (which in turn is indicated to be higher than the 2024 prices). The overall red price (including other varieties) is indicated to be static after a jump in 2025. For whites, all top 3 varieties (Chardonnay, Pinot Gris/Grigio and Sauvignon Blanc) are indicated to be static in 2026.

As mentioned above, when interpreting this information, it is important to bear in mind that the arrow is only based on the direct mathematical trends in the price indicators and the current values of these indicators. The underlying model will be refreshed with the latest information in July (when the average grape prices for the last vintage are known) and November (when the latest stock-to-sales ratios and sales figures are known), and the arrow updated if the indicated direction for any of the categories has changed.

The current indications are consistent with the ABARES independent grape price forecasts for the inland wine regions, which show increases of around 15 per cent for the red varieties in 2026 (around $40 per tonne) and increases of less than 5 per cent for the white varieties (around $20 per tonne).

No and lower alcohol market update

Wine Australia - Market Bulletin #332

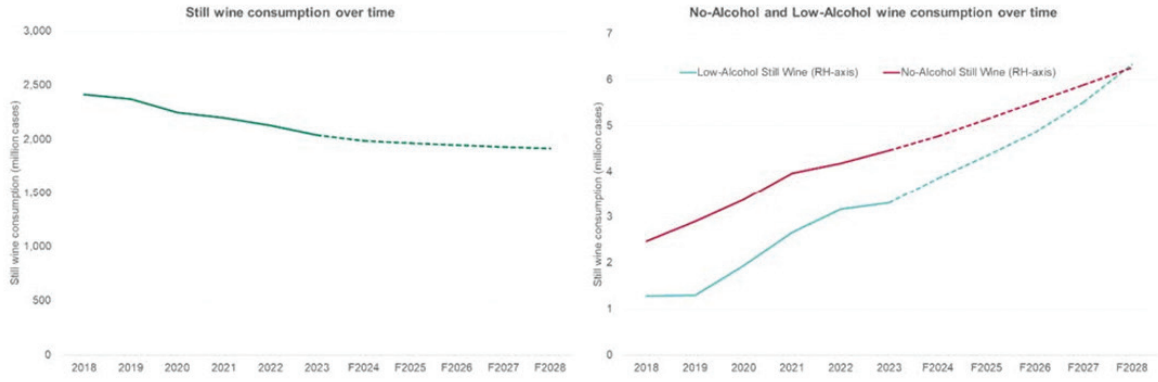
Major shifts in consumer behaviour are impacting wine consumption across the globe. In five years, the number of Gen Zs of legal drinking age will double in size but this demographic is drinking less alcohol than previous generations. In addition, consumers are increasingly mindful of their drinking habits, moderating alcohol consumption and exploring no- or low-alcohol options for health and wellness reasons. These factors, as well as cost of living pressures, have seen wine consumption decline in most established markets. However, two wine categories that have been growing are no and lower alcohol wines.

This market bulletin provides an update on the performance of the no and low alcohol wine categories globally, highlighting markets that have been growing.

According to IWSR, in the five years to 2023, the consumption of no alcohol wines increased by 13 per cent per annum to reach 4.5 million cases and for low alcohol increased by 21 per cent per annum to 3.3 million cases (see Figure 1). In comparison, consumption of still wine declined by 3 per cent per annum to 2 billion cases. This highlights that while growing strongly, the two categories are still very small in size.

IWSR is forecasting consumption of low alcohol wines to overtake no alcohol wines by 2028, with low alcohol wine consumption forecast to grow by 14 per cent per annum over the period, compared to 7 per cent per annum for no alcohol wines. Still wine consumption is forecast to continue to decline but at a lower rate of 1per cent per annum. The decline in still wine consumption will not be offset by the increase in no-alcohol and low-alcohol wines. Between 2023 and 2028, still wine consumption is forecast to drop by 123 million cases compared to a combined increase of 5 million cases for no-alcohol and low-alcohol wines. That said, the combined share of no-alcohol and low-alcohol wine of total still wine sales is forecast to grow from 0.2 percent in 2018 to 0.7 per cent in 2028.

Figure 1: Still wine consumption v no-alcohol and low-alcohol wine consumption



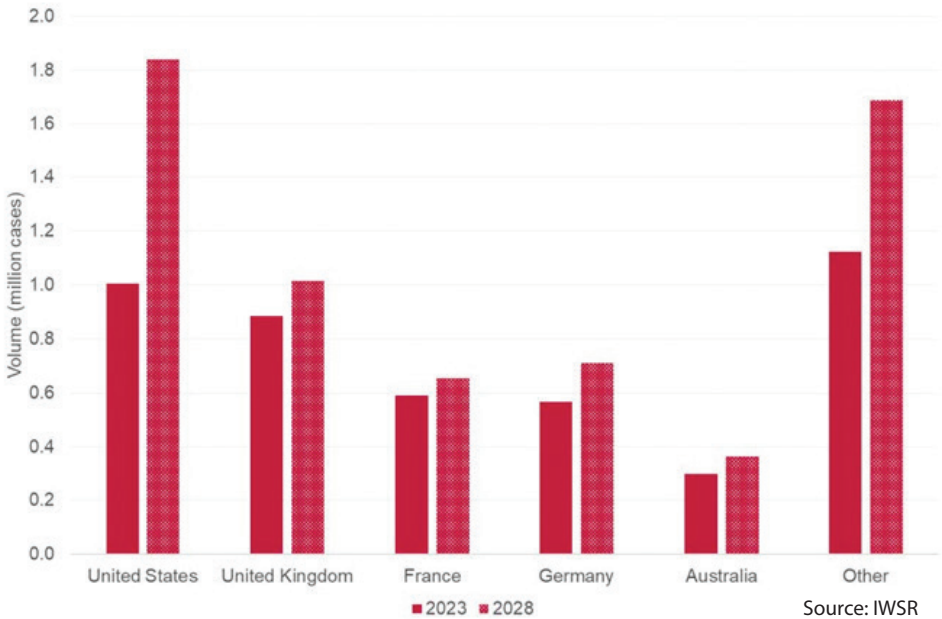
Source: IWSR

No-alcohol wine markets

In 2023, three-quarters of the global consumption of no-alcohol wines came from five markets – the United States, United Kingdom, France, Germany and Australia (see Figure 2). The consumption in all five markets is forecast by IWSR to grow in the next five years but by far the strongest growth is in the largest market, the United States. Between 2023 and 2028, the consumption of no-alcohol wine in the United States is forecast to almost double from 1 million cases to 1.8 million cases. The only other market to reach 1 million cases by2028 in size is the United Kingdom.

Other markets outside the top five with strong growth in no-alcohol wine consumption are mostly located in Europe, such as Belgium, Spain and the Netherlands.

Figure 2: No-alcohol wine consumption by top five markets



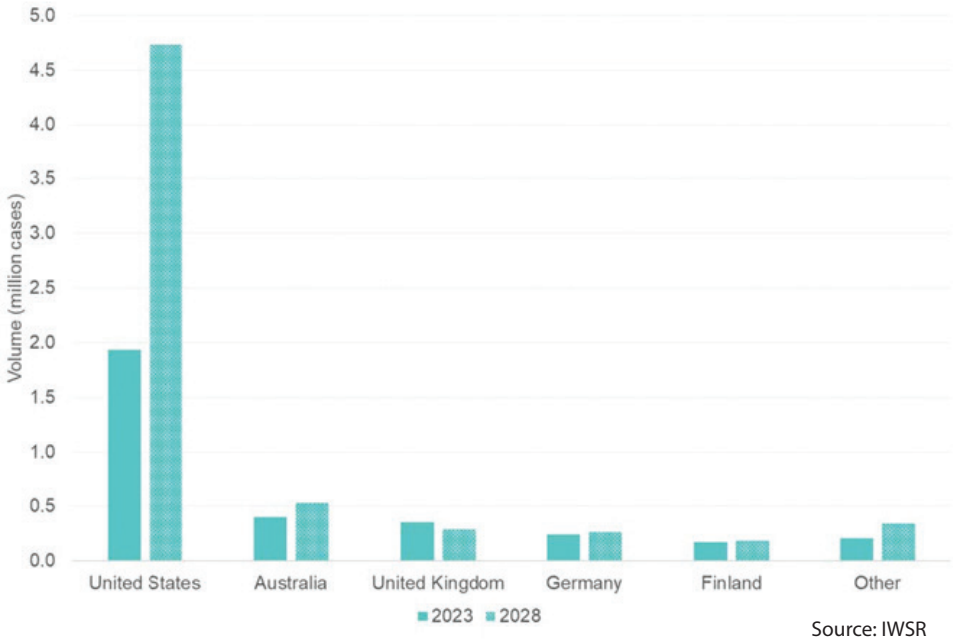
Source: IWSR

Low-alcohol wine markets

In 2023, over 90 per cent of the global consumption of low-alcohol wines came from four of the five major no-alcohol wine markets – the United States, United Kingdom, Australia, United Kingdom, Germany and Finland (see Figure 3).

The United States is by far the largest market for low-alcohol wines and is forecast to drive growth in the category out to 2028, with consumption more than doubling to over 4.5 million cases. While consumption in Australia is much lower at 400,000 cases, Australia is the second biggest market for low-alcohol wines and is forecast to grow to over 500,000 cases by 2028.

Figure 3: Low-alcohol wine consumption by top five markets



Source: IWSR

Key takeaways

The global consumption of no-alcohol and low-alcohol wine is forecast to grow strongly in the next five years, albeit off a small base. The United States is by far the biggest market for each of the two categories, but Australia is also a significant market, particularly for low-alcohol wines.

Outside of the United States and Australia, the growth is coming from established markets in Europe. There is very little presence of no-alcohol and low-alcohol wines in emerging markets, especially in Asia.

While the growth in no-alcohol and low-alcohol wines is forecast to be strong, it will not offset the decline in still wine sales. However, the share of the categories is likely to continue to grow over time as consumers, especially younger demographics, continue to moderate alcohol consumption and seek lower or no alcohol beverage alternatives.

Exploring lower alcohol potential

By Christine Webster

Australian wine producers are being encouraged to seek opportunities in developing no and low alcohol wines and mid strength wines, (NLM).

Research Fellow in Marketing and Wine Business, Dr Hannah Ford from the Adelaide Business School at The University of Adelaide is conducting a study on the advancement of Australian lifestyle wines.

She said this research involves examining the potential of NLM wines by speaking to wine trade operators in key consumer markets that include the United Kingdom and Australia.

Dr Ford said focus group consultations have also taken place with those who drink alcohol and those who prefer non-alcoholic beverages.

She said it was evident that demand for wine with less or no alcohol was consistently growing.

But Dr Ford said it was not yet clear, if the products that were available in supermarkets and in the bottle shops met consumer needs, with overly sweet taste perceptions and expensive prices mentioned as key barriers to acceptance.

Dr Ford said wine producers have started to experiment with making mid-strength wines.

"It has definitely intrigued a lot of winemakers because it tackles the issue that non-alcoholic wine has in terms of their sensory challenges and negative quality perceptions," she said.

"They are making wines lighter in alcohol, but it is still in the seven to 10 per cent alcohol by volume (ABV) range."

"You can still have a similar tasting experience to wine with more ABV, which is a good benefit to have, so there is an advantage with this kind of product."

"People are becoming more health conscious, and they are sober curious, and they want to follow the moderation trend."

Dr Ford is encouraging the wine industry to do more to market their NLM products.

She said consumers may not be aware of the mid-strength wines that were now emerging in the marketplace.

Dr Ford said the wine industry needed to do more to market its medium-strength products.

Wine trade operators taking part in the University of Adelaide study indicated that the industry needed to find a way to replicate the beer industry's promotion of its middle-strength beverages.

"The beer industry has been able to form an association of its mid-strength products with 'sessionable' drinking," Dr Ford said.

"I think there is a lot to learn from the beer category, but obviously it is a different product."

She said beer seemed to be more associated with sport, while wine tended to have an image linked to food and the arts.

IWSR data shows that Australia is amongst the top five key markets for NOLO wine along with the UK, the United States, France and Germany.

There is limited data around the growth of mid- strength wine, but UK wine trade operators described a growing market presence.

Dr Ford suggested that support from Federal and state governments would be more than welcome to incentivise the production of NLM wines.

One of the trade operators involved in The University of Adelaide study said wine producers needed to act quickly to take advantage of the window of opportunity that existed for NLM products.

"The operator said it was likely that the market could become overly saturated with brands jumping on the NLM ride," Dr Ford said.

She said making a premium NLM product could be too costly for some wine grape producers.

"To make these lighter alcohol wines a lot more processing is involved and making them could be quite a challenge," Dr Ford said.

The University of Adelaide is also collecting survey data examining the risk and value of developing NLM wines in Australia and the UK.

"We are presently studying how consumers engage with their brands," Dr Ford said.

"Perhaps we can provide wine growers with a more definitive answer in the New Year on whether it is worth extending their brand to include NLM products," she said.

A display of mid strength wines in a supermarket in the United Kingdom.

Research Fellow in Marketing and Wine Business, Dr Hannah Ford from the Adelaide Business School at The University of Adelaide. PHOTOS: supplied.

R&D the key for NOLO wine

By Christine Webster

Growers in the Murray Darling and Swan Hill regions are keen to become more involved in the research and development of lower and no alcohol wines but are seeking more industry support.

Murray Valley Winegrowers chair Chris Dent said more direction was required on the specific needs wineries may have to optimise outcomes for the end product.

"I think it would be fair to say that growers can see the potential for lower alcohol wines to assist with addressing supply and demand issues, particularly for the current surplus of red wine," he said.

"Perhaps some are sceptical that no alcohol wines will deliver some meaningful reduction in the oversupply of red wines grapes, however they are generally more positive about lower and mid-strength wines.

"We only need to look at beer production, who would have thought 40 years ago when light beers were first introduced that a mid-strength beer would become Australia's number one selling beer as it is today.

"We are also hearing that alcohol consumption globally is changing as consumers are more inclined to consider moderation, health, and wellbeing – so we need to move with the times and explore all opportunities to meet customer demands."

Mr Dent said the Sunraysia region was already making a significant contribution to the production of lower alcohol wines.

He said Australian Vintage's Buronga Hill winery at Mourquong just over the NSW border, northeast of Mildura was Australia's market leader when it came to reduced alcohol wines.

Mr Dent said the winery had the plant, equipment, and know-how in a market that was ever evolving and improving in terms of flavour, mouth feel, and perceptions, particularly for red wine.

"Many lower alcohol wines that are being marketed in Australia will most likely have been through the Australian Vintage Buronga Hill winery.

Mr Dent said the wine grape industry would welcome more research and development support from Federal and state governments.

"The industry has been doing it tough for a few years and has been somewhat volatile over the past couple of decades, so government support would be welcome," he said.

"There are some great operators in the wine industry, and I'm confident that with a spirit of co-operation between our researchers, wine producers, growers, and government we can realise some really positive outcomes relatively quickly.

"In addition, and if possible, some sort of incentive for lower taxes on reduced alcohol wines would be beneficial to attract new customers."

Creating a moment for Australian wine *(cont. from page 1...)*

"We make a wine for that."

Nick Waterman, Chair of the Joint Marketing Group said the JMG agreed the campaign meets a clear need for category alignment: "This campaign is about giving the sector a fresh way to engage Australian consumers and reinvest in the Australian wine story. It is an opportunity for the industry to stand united and have a consistent message about the importance of wine and the role it can play in different occasions. It's not telling people what to drink or why. It's about showing up in the moments they already value and making Australian wine accessible and appealing.

"It's a campaign that unites us as a sector and gives us shared momentum to amplify everyone's efforts. Whether you're a family-run cellar door, a large brand, or a local wine bar, there's space to make this message your own. The opportunity is to make Australian wine feel relevant to the moments that matter to our consumers, and this campaign gives us the tools and language to do that."

How to get involved

The campaign toolkit, available now at wineaustralia.com/wemakeawineforthat, includes free, ready to use assets such as logos and graphics, social media assets, point of sale materials as well as adaptable templates for businesses to customise with their own imagery and branding. These resources will be available ongoing and are designed to make it easy for wine businesses to tailor the campaign to their brand and audience.

Businesses are also encouraged to submit campaign-related events or activations taking place from August onwards to the national events calendar. These can range from tastings, in-store promotions, venue collaborations to themed digital campaigns – anything that brings the campaign to life. Submitted events will be featured on a consumer-facing campaign website, helping to drive awareness and foot traffic. The event calendar will be a key promotional tool in national media and PR activity during the consumer rollout from August.

Get campaign-ready now ahead of the August launch. Visit wineaustralia.com/wemakeawineforthat to download the free campaign toolkit and start planning your activities.

Wine Australia

Murray Valley Winegrowers' prolific Workshop delivery

Vine Health Workshops

The Vine Health Workshops returned to Midura and Swan Hill this year. The Swan Hill Workshop was delivered at The Swan Hill Club in the afternoon on the 14th of May. The Mildura event returned to the Mildura Field Days in the morning of Friday the 16th of May. The program was:

Ultra Violet light control of Powdery Mildew - Ben Thomson, Managing Director, Bests Wines. Ben presented the results of a trial of a UVc light treatment machine towed by an autonomous electric vehicle on one of their vineyards. The control of mildew and build up of beneficial insects and spiders was encouraging.

Managing Queensland Fruit Fly without government support - Andrew Jessup. Andrew presented the steps growers can take to keep fruit fly numbers under control.

Grape Pricing - Sandy Hathaway, Wine Australia. Sandy provided an overview of the Grape Price Indicators Dashboard.

CCA and Creosote posts. Development of recycling options - Professor Tripti Singh Director, National Centre for Timber Durability & Design Life. An update on the project to investigate options for recycling CCA and Creosote posts was presented by Tripti.

New research in management of Scale in vineyards - David Logan, Adelaide University. The initial findings of a new research project and next steps in research were discussed by David.

Demonstrations

After lunch at the Mildura Field Days on Friday the 16th of May presentations were delivered at the viticulture industry site. Agsafe presented information about the Bag Muster and Drum Muster Programs. Practical approaches to vineyard and orchard recycling were discussed by Daryn Gardner and Neale Bennett, who reflected on their first-hand experience. Peter Henry from Netafim explained how the drip tape recovery and recycling program operates. The Netafim machine for bundling up drip line for recycling was on display.

Farm Chemical Users Courses

21 growers and winery staff attended two farm chemical training sessions on the 8th and 9th of May. 11 people completed the full course and 10 completed the one-day refresher to keep their existing farm chemical user certification.

FINAL chance for local SWA training

The vast majority of MVW members have attended our free SWA (Australian Wine Industry Standard of Sustainable Practice Viticulture) training workshops over the past few years.

We are now taking expressions of interest for a SWA workshop to be run on the 31st of July 2025. There is no cost for MVW members (the usual cost is $800-$900). Attending the SWA training is essential to receiving SWA viticulture certification.

Contact Stephen Kelly at the MVW office by Monday the 30th of June 2025 on ph. 50213911 or email stephen@mvwi.com.au to express your interest in attending SWA training.

** Funding for all of these events has been provided by the Wine Australian Regional Program.*

South Australia explores regional collection points for CCA-treated vineyard trellis posts

A feasibility study is underway in South Australia to determine if collection points in the state's wine regions could be a simple, sustainable and cost-effective way to help vineyard owners manage the disposal of CCA-treated trellis posts.

Across Australian vineyards, it is estimated there are around 70 million timber trellis posts treated with CCA— a timber preservative containing copper, chromium and arsenic that protects it from fungal and insect attack. More than half of these are in South Australia, and each year, between 700,000 to 1.8 million CCA posts need to be disposed of across the state due to breakage, vineyard redevelopment or removal.

Currently, the only legal way to dispose of CCA-treated posts is at licenced landfill sites, an option that is often cost and logistically prohibitive. As a result, vineyard owners and operators are advised to safely stockpile their posts on site until a long-term solution is found.

To identify a better approach, Wine Australia has commissioned a feasibility study to assess potential locations in South Australian wine regions where CCA-treated posts could be collected or delivered from nearby vineyard owners. Green Industries SA (GISA) and the Department of Primary Industries and Regions(PIRSA) have co-invested $49,405 into the feasibility study which will be carried out by Rawtec, a consultancy specialising in the circular economy, waste and resource management sector. The findings will help inform government and industry on whether regional collection points could be a practical long-term solution.

Wine Australia CEO, Dr Martin Cole, said the Australian grape and wine sector is committed to finding ways to recycle and recover CCA-treated posts in a way that minimises potential impacts to the environment and the community.

"The sector is working hard to explore alternative, low-emission uses for end-of-life posts and we are optimistic that a long-term solution will be found.

"In the meantime, we want to test the viability of transporting and collecting these materials at dedicated regional sites. If found viable, these sites would not only assist in providing a certainty of supply for any future CCA timber recovery solution, but simplify the responsible disposal of posts for growers," Dr Cole said.

Rawtec's final report is expected by mid-2025.

Complementing the feasibility study is the recent announcement of $800,000 in funding from the South Australian and Commonwealth Governments for a stewardship scheme to address the reuse, recovery, management and safe disposal of treated timber.

The Treated Timber Product Stewardship Working Group, consisting of members of the wine and forest industries, environment specialists and universities, will develop a national stewardship framework that aims to find and promote accessible and environmentally-preferred solutions for all treated timber that diverts it away from landfill and minimises greenhouse gas emissions.

The project, which will be managed by the South Australian Wine Industry Association, will have an initial focus on addressing the management of CCA treated timber stockpiled on vineyards.

It also aims to improve community and industry understanding of the risks of incorrect disposal and educate them about their environmental stewardship responsibilities.

Funding for the program is part of the South Australian and Commonwealth Governments SA Wine Recovery Program and the SA Wood Fibre and Timber Industry Master Plan.

The SA Wine Recovery Program has been developed following recommendations made by the National Viticulture and Wine Sector Working Group, established by Agriculture Ministers to support the wine industry to recover and return to productivity and sustainability from the adverse events and market disruptions experienced in recent years.

Whilst the feasibility study and stewardship scheme are positive developments in the management of end-of-life CCA trellis posts, vineyard owners and managers are reminded of their environmental and legal responsibilities in managing them.

Further information on end-of-life solutions for vineyard posts, including how to stockpile them safely, can be found on the Wine Australia website.

A message from the EPA - Disposal of Waste by Burning

Key messages

- Disposal of waste by burning it is illegal.
- Waste, like treated pine posts, ag plastics, hessian, concrete, metal, waste tyres and mattresses, must be disposed of lawfully and at a place that is licensed to accept it.
- Smoke from waste burn-offs can lead to harmful effects on human health, particularly for people with asthma or other lung conditions, older people, pregnant women, babies and young children
- Under the General Environmental Duty, it is everyone's job to act to protect the environment.
- Check what you can and can't burn off to avoid being a nuisance to your neighbour, harming the environment or fined by EPA.

Be careful what you throw on the fire

As fire restrictions ease, check what you can and can't burn off.

Common farm wastes like, silage wrap, grain bunker bags, old tyres, treated timber or used chemical drums, can't be added to your burn off.

Take these common waste streams to an appropriately licensed landfill or recycling facility. For old treated timber posts, if you need to stockpile, follow EPA's guidance on management and storage of combustible recyclable and waste materials (https://www.epa.vic.gov.au/for-business/find-a-topic/manage-industrial-waste/crwm). This will help you manage stockpile height and distances between stockpiles.

Environment Protection Authority (EPA) Victoria has a handy guide available from its website on farm waste management (https://www.epa.vic.gov.au/about-epa/publications/iwrg641-1). You can also find your nearest licensed landfill or recycling facility from your local council's website or from EPA's Public Registers (https://www.epa.vic.gov.au/about-epa/public-registers/permissions).

Burning these materials can contaminate the land, waterways and the atmosphere. Smoke from waste burn-offs can have harmful effects, particularly on people with asthma or other lung conditions, older people, pregnant women, babies and young children.

Avoid being a nuisance to your neighbours, causing a hazard to the environment or getting a fine from EPA by checking what you can and can't burn off.

You can report pollution to EPA's 24-hour pollution hotline at 1300 372 842 or online at https://www.epa.vic.gov.au/report-pollution

Relevant web links:

- General Environmental Duty - https://www.epa.vic.gov.au/about-epa/laws/laws-and-your-business/general-environmental-duty-for-businesses
- Farm Waste Management - https://www.epa.vic.gov.au/about-epa/publications/iwrg641-1
- Management and Storage of Combustible Recyclable and Waste Materials – guideline - https://www.epa.vic.gov.au/for-business/find-a-topic/manage-industrial-waste/crwm

EPA VICTORIA

The benefits of agrochemical testing for wine grapegrowers

Managing the health and productivity of grapevines while meeting stringent market and regulatory standards is a fine balance. One of the most effective tools available to wine grape growers is agrochemical testing. By systematically analysing for chemical residues, growers can make informed decisions that support vine health and compliance with contractual and export requirements.

Agrochemical testing provides detailed insight into the presence of pesticide and herbicide residues in vineyard environments. This is essential for maintaining the integrity of the fruit and avoiding issues that could affect fermentation, flavour or legal compliance. Residue scan persist in vines or soil from previous applications, neighbouring property drift or contaminated inputs. Identifying these early allows for corrective action before harvest, protecting both the quality of the fruit and resulting wine.

For export-focused producers, agrochemical testing is often non-negotiable. Many international markets have strict maximum residue limits(MRLs) for specific chemicals. A batch of grapes or bottled wine that exceeds these thresholds can be rejected outright, leading to costly losses.

Within agrochemical testing, it's important to understand the scope of different assays. A general agrochemical assay typically screens for a wide panel of pesticides and fungicides commonly used in vineyards. These tests help to confirm residues from approved sprays are within safe and legal limits. They can also detect unexpected contamination from drift or previous land use.

In contrast, phenoxy acid herbicide testing targets a specific group of synthetic herbicides, including compounds like 2,4-D and MCPA. These are particularly concerning in viticulture because even trace amounts can lead to poor fruit set, distorted leaves or reduced yields. Phenoxy herbicides are not commonly used in vineyards, but they may drift from other horticultural, broadacre or pasture crops nearby. Because of their potency and volatility, phenoxy herbicides warrant separate, targeted testing.

The best time to undertake agrochemical testing is before veraison, when grapes begin to soften and change colour. Testing at this stage allows time for any issues to be addressed before harvest. For phenoxy herbicides, testing should also occur during periods of increased risk– particularly after nearby crop spraying during spring.

To establish an effective testing regime, grape growers should:

1. Assess risk factors Consider vineyard history, proximity to other types of agriculture and recent spray records.
2. Test annually Schedule routine testing in early- to mid-season, with additional tests if unusual symptoms appear in the vines.
3. Work with accredited laboratories Affinity Labs use validated testing methods and work with the AWRI helpdesk to offer guidance on interpreting results.
4. Keep detailed records Document all testing results, actions taken and communication with spray contractors or neighbouring properties.

By integrating agrochemical testing into vineyard management plans, grape growers can protect vine health, meet market expectations and contribute to a more transparent and sustainable wine industry.

Through all kinds of weather...

At RFCS Vic West, we provide a financial counselling service, which means that we aim to inform and empower winegrowers to make their own decisions. We'll sit down with a client at their kitchen table and help them understand their financial position, explore options, and show them where they may be able to make changes or access grants and government packages.

Our aim is to teach our clients to know the financial side of their business as well as they know their soils, grape vines and winegrape production. Through engagement with the service, our clients will be better prepared for the inevitable fluctuations that come with being a winegrower. And when natural or other disasters hit, we will have up to date information on available grants or assistance packages and can provide guidance with the application process.

While we want our clients to have more control over their business operations, we don't expect them to become skilled negotiators overnight. Using our years of experience, we can help clients prepare for meetings with lenders or creditors by ensuring business plans and cash flow budgets are up to date and any other relevant information has been gathered.

The unpredictable nature of farming, increased cost of living and other life events or circumstances can lead to mental health problems which can have mild to debilitating repercussions. At RFCS Vic West we have broadened our service to include Wellbeing counsellors who can help clients manage some of the challenges that face farming families. Wellbeing counsellors work hand in hand with financial counsellors offering a discreet, confidential and holistic service.

For more information on our free and confidential services go to rfcsvictoriawest.com.au or call 1300 735 578.

RFCS Victoria West | finwell Support

Business and wellbeing support for farmers and small business owners

CONFIDENTIAL | INDEPENDENT | FREE

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www.rfcsvictoriawest.com.au

National Vineyard Register framework nears first draft

The project to establish a National Vineyard Register to improve the Australian grape and wine sector's understanding of its supply base of winegrapes to support better decision-making by winegrowers is nearing the end of its first 12 months.

Funded by the Department of Agriculture, Fisheries and Forestry as part of a $3.5 million industry support package, the first objective of the project is to develop a framework for a national vineyard register that would provide data on the area of bearing and non-bearing vines, the age profile of vines, varieties planted and location by geographical indication.

A first draft of the framework is nearing completion following a consultation process with the sector which comprised dozens of responses received by written submission, by phone, in person and in an online workshop with inland growers and grower representatives. Existing agricultural registers and databases have also been reviewed.

Wine Australia senior analyst Sandy Hathaway, who is coordinating the development of the register, said the key themes from the consultation process are being used to inform the next phase of the project.

"While there was a wide range of opinions, consistent themes included minimising the extra burden on growers, looking at various options for gathering existing data to avoid duplication, ensuring that benefits for growers are clear and creating something that could be expanded in future.

"We expect to have a first draft of the framework ready for consideration by the end of June. We are also continuing with related activities to support this work, including identifying requirements for data standards, reviewing existing datasets that could be incorporated into the register and evaluating options for conducting a national vineyard scan to underpin the register," she said.

Wine Australia

LMW's Rural Irrigation Masterplan 2050

Lower Murray Water (LMW) is developing a Rural Irrigation Masterplan to help guide future service planning and configuration of the water corporation's irrigation supply infrastructure.

"Our region produces the highest value of irrigated horticulture in Victoria and we want to ensure that continues well into the future," LMW Managing Director Paul Northey said.

"Once completed, the Rural Masterplan 2050 (RM2050) will provide a comprehensive document that analyses trends and opportunities in commodities markets, current and future urbanisation patterns, and changes in horticultural production across the LMW region.

"Additionally, RM2050 will include an options analysis to help us identify opportunities for water and cost savings and future capital investment in one of Australia's most important horticultural regions."

Development of RM2050

LMW has partnered with Ricardo Group, a renowned global consulting firm with extensive experience in Australian water policy and infrastructure. Led by Chris Olszak and supported by local experts, Ricardo will assist LMW to meet the unique needs of the region.

Work commenced on RM2050 at the start of this year and encompasses LMW's four primary irrigation districts – Mildura, Merbein, Red Cliffs and Robinvale along with – where feasible – adjacent lands where service expansion could be considered. It will also cover the areas that are traditionally known as private diversion areas along the Murray River from Nyah to the South Australian Border.

Adapting to Change

The LMW region has seen a number of changes over the past few years, particularly as urban areas continue to grow and many agricultural properties are being consolidated.

These changes, together with future climate predictions pointing towards lower annual rainfall and warmer temperatures, mean LMW needs to be on the front foot when planning future works programs.

"While RM2050 is focussing on irrigation and drainage infrastructure in our irrigation districts, it will also consider the peri-urban areas surrounding the Mildura and Robinvale localities," Mr Northey said.

"It builds on the significant irrigation modernisation that has already been achieved through the delivery of the Sunraysia Modernisation Projects (completed 2019) and the Sunraysia Water Efficiency Project (completed 2024).

"We are working closely with key stakeholders throughout the region including Mildura and Swan Hill councils, government agencies such as Agriculture Victoria and Mallee Catchment Management Authority (CMA), commodity groups and rural customers during the development of RM2050 to identify challenges and opportunities.

"By exploring and identifying opportunities that are available to our region, we can work with stakeholders to adapt to changing environments and provide efficient, affordable services for future generations."

Have Your Say

Local knowledge is important to the development of RM2050 and feedback is welcome at any time. Rural customers and community members are encouraged to get in touch with the RM2050 project team via the email link on the LMW website.

"Given the diversity of our rural customers, we are keen to hear from people in family businesses and larger corporate irrigators to ensure we have a full understanding of the challenges and opportunities in the region," Mr Northey said.

The RM2050 is expected to be completed by mid-December 2025.

Further Information

LMW's RM2050 is funded by the Victorian Department of Energy, Environment and Climate Action (DEECA).

Community members can keep up to date on the progress of the RM2050 by visiting: https://www.lmw.vic.gov.au/water-supply-and-services/projects-and-works/rural-masterplan-2050/

The RM2050 project team can be contacted by email at: RM50@lmw.vic.gov.au

Murray Darling Basin Authority - May 2025 Update

Images of the catastrophic flooding in South-East Queensland were national news in late March and early April. While the heaviest rainfall was outside the Murray-Darling Basin, the Paroo and Warrego catchments experienced major flooding, such as in Wanaaring where the Paroo River peaked 25 cm above the previous record.

Despite some extremely large peak flows during this event (both the Warrego at Wyandra and the Paroo at Caiwarro peaked just above 180,000 ML/day – slightly more than the peak flow through Yarrawonga Weir during the 2022 floods on the Murray) by the time this water reaches the Darling the flows will be greatly reduced. The Paroo River generally spreads out over the floodplain south of Wanaaring, and it is only in the biggest of events that it drains to the Darling just upstream of Wilcannia.

Indications are that the Paroo is likely to reach the Darling from this event. If this occurs it is thought to be only the 6th time the two rivers have joined since Europeans arrived in the area.

The Warrego spreads out onto a large floodplain downstream of Charleville, and spills over to both the Paroo and Culgoa catchments. The Cuttaburra Creek branches off the Warrego downstream of Cunnamulla and generally terminates in Yantabulla Swamp but in very large events like this one it connects through to the Paroo River.

Generally, more water flows down the Cuttaburra than the Warrego in events like this. In this case, the peak flow in the Cuttaburra at Turra was around 45,000 ML/day while the Warrego at Barringun was only 20,000 ML/day.

Inflows to the Darling from the Warrego, measured at Dicks Dam, have peaked at just over 4,000 ML/day (although it is possible that some additional water may drain back to the Darling from the Warrego floodplain, bypassing the gauge).

Inflows from the Paroo to the Darling are extremely difficult to forecast, given how rarely they have occurred in the past, but it is likely that if the Paroo does reach the Darling, we will see water drain in for some time at relatively low flow rates.

While the floods in Queensland received most of the media attention, parts of northern New South Wales also received record rainfall, which has driven the increased flows currently making their way down the Darling.

Both the Gwydir and Namoi Rivers saw peak flows in excess of 40,000 ML/day, which drove the event in the Darling. While in Queensland rainfall reduced as the system moved east, the Darling still received peak contributions of around 10,000 ML/day from both the Moonie and Culgoa rivers.

The forecast volume of inflows to the Menindee Lakes at the time of writing was for a total of 800 – 1,200 GL. With the lakes holding just over 500 GL when the inflows began arriving, there is sufficient airspace available to capture these forecast inflows. In response, the MDBA has increased our call on the Menindee Lakes. This will help create additional airspace should inflows be higher than forecast and allow us to reduce our call on Hume Dam to conserve water in the upper Murray storages.

Looking at the Murray, while Hume Dam is lower than it has been at this time of year in recent years, it is not unusually low and is now beginning to rise as downstream demands ease. We have been adjusting our transfers from Dartmouth to Hume to ensure there is enough water in Hume to meet early season demands next year if it remains dry, while also maintaining airspace to allow us to capture inflows if it turns wet. Dartmouth Dam is at 76% at the time of writing, which is equivalent to almost the entire capacity of Hume.

With the Menindee Lakes now likely to be available to the MDBA for some time we are adjusting our operations to reduce releases from Hume, which reduces the need to transfer water from Dartmouth, maximising the volume of water available in our most secure storage.

As we approach winter and the main inflow period we are preparing for all scenarios, from very wet to extreme dry. Having access to a large volume of water in Menindee will give us additional flexibility to deliver water to users in the new water year, regardless of conditions in the Murray catchments over the coming months.

Spring-summer compliance data shows fines issued up almost 70%

NSW water law compliance data for spring-summer 2024-25 has shown an increase in the number of fines (penalty notices) issued by the NSW Natural Resources Access Regulator (NRAR) compared to the same period in 2023-24.

The number of fines issued increased from 26 to 44 for the period across NSW.

NRAR issued fewer directions and stop work orders over spring-summer compared to last year (110, down from 139) but the number of formal warnings and official cautions issued remained steady on 118.

The number of inspections done by the independent regulator increased by 66% compared to the same period last year (171 to 285).

NRAR received 1171 suspicious activity reports in the spring-summer period 24-25, and 490 of those were referred for further investigation. This is similar to the previous year when there were 1358 suspicious activity reports and 356 referred for further investigation.

Of the state's 14 water sharing plan regions, the North and Far North Coast regions had the highest number of penalty notices issued (16). That is a 300% increase on the same time last year and more than double the next highest total of 8 recorded in the Murray Water Sharing plan region.

The Namoi Water Sharing Plan Region had the highest total number of enforcement actions in NSW for the period with 50, including fines, directions and stop work orders, formal warnings and official cautions.

TABLE: Compliance data for the five NSW water sharing plan regions with the highest number of enforcement actions for spring-summer 2024-25.

Water sharing region	Year	Total number of enforcement actions	Fines (penalty notices)	Directions and stop work orders	Warnings and official cautions
Namoi	2023-24	53	0	25	28
	2024-25	50	5	30	15
Murrumbidgee	2023-24	13	3	9	1
	2024-25	41	4	11	26
Lachlan	2023-24	63	8	49	6
	2024-25	36	5	14	17
Murray	**2023-24**	**33**	**6**	**3**	**24**
	2024-25	**36**	**8**	**11**	**17**
Barwon Darling	2023-24	21	0	3	18
	2024-25	26	4	13	9
Macquarie Castlereagh	2023-24	32	1	9	22
	2024-25	24	1	12	11

In all the listed regions (above) the most common offence types detected by NRAR staff in spring-summer were alleged unlawful water take, non-compliant metering or failing to comply with approval conditions.

NRAR Manager Compliance Investigations, Tim O'Connell, said releasing compliance data was an important part of NRAR's commitment to transparency about its activities and results.

"A variety of compliance data is publicly available on our website, and this gives confidence to the public that water is being managed effectively, and action will be taken when rules are broken," Mr O'Connell said.

"When we decide how to respond to breaches of the law, we focus our efforts and resources on those that pose the greatest risk of harm to communities, the environment or other water users," he said.

"A lot of people are already doing the right thing, and we are encouraged by that.

"The number of breaches is small compared to the 39,000 licences monitored by NRAR, but that said, even small breaches matter because together they can add up to a serious widespread problem."

NRAR image showing the diversion of water from a creek so it flows toward a farm dam (near Gunnedah)

Exports to China exceed $1 billion while economic volatility increases uncertainty in global markets

In the 12 months ended March 2025, Australian wine exports increased by 41 per cent in value to $2.64 billion and by 6 per cent in volume to 647 million litres, according to Wine Australia's Export Report. The average value of exports increased by 33 per cent to $4.09 per litre free on board (FOB), the highest average value in almost two decades.

The increase in average value is mainly due to the elevated level of premium wine shipments to mainland China, after tariffs on Australian bottled wine were removed at the end of March 2024. The 12 months ended March 2025 represented a full year's worth of exports to mainland China since the tariffs were eliminated – resulting in 96 million litres of exports to the market, valued at $1.03 billion. Mainland China now represents 39 per cent of total export value, but 15 per cent of volume.

Exports to the rest of the world (excluding mainland China) declined by 13 per cent in value to $1.62 billion and 9 per cent in volume to 551 million litres. This was the lowest value to the rest of the world in ten years (see Figure 1) and lowest volume in over twenty years. While the decline in value was mainly driven by Hong Kong, the volume drop was due to declines in exports to key destinations such as the United Kingdom (UK), United States (US), and Canada.

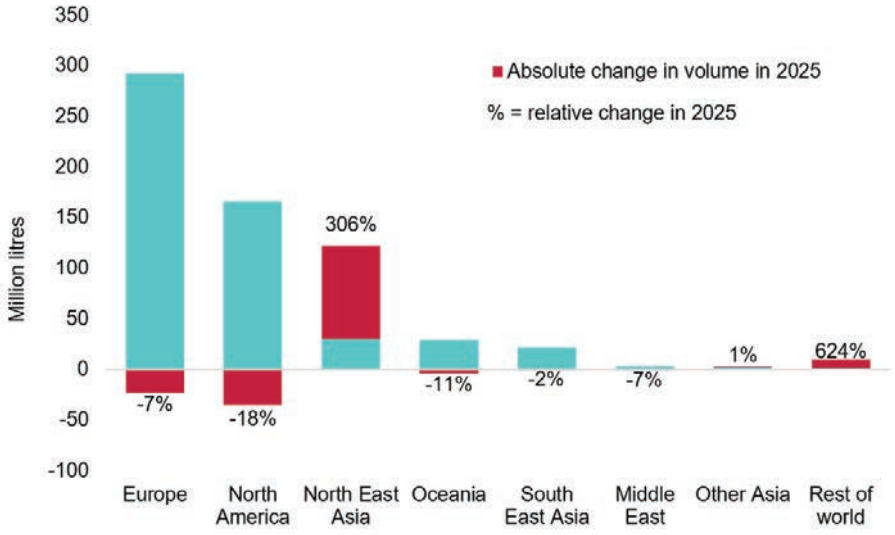


Figure 2: Australian wine exports by region (Million litres)

Outside of the unique circumstances relating to Australian wine exports to mainland China, the global wine market is facing considerable headwinds which are impacting on results to other markets and are unlikely to be resolved in the near-term. While there has been a long-term trend of consumers drinking less alcohol due to health and wellness concerns, more recent cost-of-living pressures could continue, or potentially get worse in certain markets, given current economic and geopolitical volatility. Escalating trade wars have the potential to increase prices, complicate supply chains, and rapidly change the competitive landscape in key wine markets in the near-term.

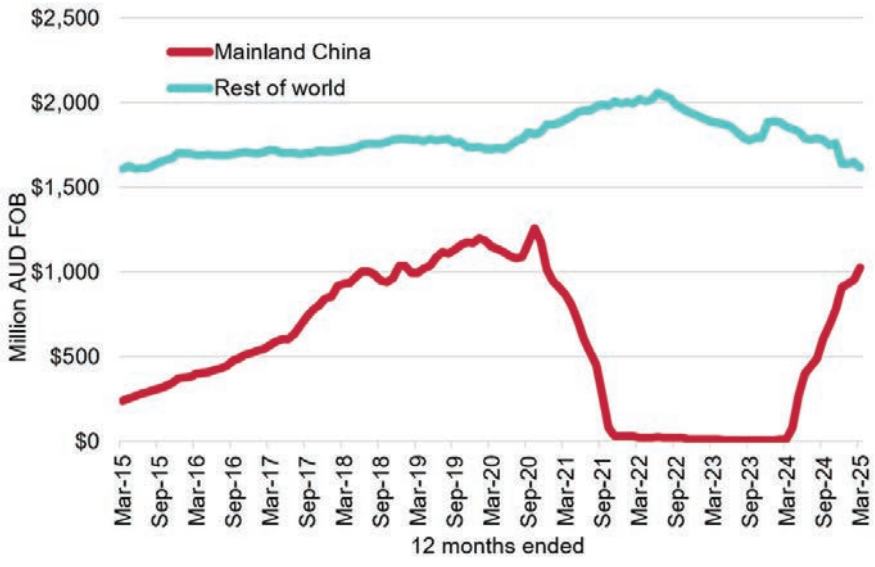


Figure 1: Australian wine export value, mainland China vs rest of world

Australian wine was exported to 120 destinations in the year ended March 2025, up from 114 in the previous 12 months.

The largest region by volume for Australian wine exports was Europe, receiving 292 million litres of wine worth $515 million in the 12 months ended March 2025. Exports to Europe declined by 7 per cent in volume, mainly driven by a decline in exports to the UK.

Exports to North America declined by 18 per cent in volume to 166 million litres, valued at $476 million. While shipments to the US and Canada both declined in volume, Canada increased in value due to an increase in premium packaged shipments.

Shipments to Northeast Asia increased by 92 million litres (306 per cent) to 122 million litres. Value increased by $870 million to $1.28 billion. This increase was driven by exports to mainland China, although some of the growth was offset by a decline in exports to Hong Kong.

The top five destinations by value were:

- Mainland China (up $1.01 billion to $1.03 billion)
- UK (down $12 million to $353 million)
- US (down $32 million to $323 million)
- Hong Kong (down $136 million to $154 million), and
- Canada (up $3.8 million to $151 million).

The top five destinations by volume were:

- UK (down 19 million litres to 208 million litres)
- US (down 21 million litres to 106 million litres)
- Mainland China (up 94 million litres to 96 million litres)
- Canada (down 14 million litres to 60 million litres), and
- New Zealand (down 3.5 million litres to 26 million litres).

Figure 3: Average value per litre of packaged shipments (markets listed in order of volume)

Mainland China

In the 12 months ended March 2025, Australian wine exports to mainland China increased by 94 million litres in volume to 96 million litres and $1.01 billion in value to $1.03 billion. The average value of shipments to mainland China was $10.65 per litre FOB, the highest average value in the top 10 markets by volume.

This average value is a result of a comparatively high level of premium wine shipments into the market. The average value of packaged wine shipped to mainland China in the year ended March 2025 was $23.00 per litre, much higher than any other major export market (see Figure 3). There were 41 million litres of packaged exports (mostly in glass bottle) shipped to China during the last 12 months, worth $955 million. This represents a 43 per cent share of volume and a 93 per cent share of value to the market. Meanwhile, 55 million litres of unpackaged exports were shipped (a 57 per cent volume share), worth $73 million (7 per cent of total value).

While the total value of shipments to mainland China is now at a similar level to the years immediately before tariffs on Australian bottled wine came into force, volume in the last 12 months is 23 per cent smaller than the 5-year average between 2016 and 2020 and 44 per cent below the peak in 2018. The lower volume reflects that the total wine market in China has declined by 68 per cent over the last five years, from 146 million 9-litre cases in 2018 47 million in 2023.

United Kingdom

In the 12 months ended March 2025, Australian wine exports to the United Kingdom (UK) declined by 8 per cent in volume to 208 million litres and 3 per cent in value to $353 million. Average value increased by 6 per cent to $1.70 per litre FOB.

The UK is Australia's largest export market by volume, owing to Australia's strong position in the UK off-trade market and the presence of large bottling facilities packaging wine, which in some cases then gets re-exported to other European markets. Although inflation has eased, consumers in the UK are still cautious with their spending on discretionary goods and most alcohol categories are suffering as a result. Wine sales dropped by 4 per cent in volume in the UK off-trade in the 12 months ended December 2024. Meanwhile, the average price of wine increased by 4 per cent to £6.79 per bottle.

The number of exporters shipping to the UK increased to 314 businesses, up by 23 from the previous 12 months. Of the top 20 exporters by value, 15 experienced a growth in export value in the past year.

United States

In the 12 months ended March 2025, Australian wine exports to the United States (US) declined by 17 per cent in volume to 106 million litres and 9 per cent in value to $323 million, making it Australia's second largest market by volume and third largest market by value.

On 2 April 2025, US President Trump announced tariffs on all importing countries, including Australia. Australian wine is now (at the time of writing) subject to a 10 per cent tariff on arrival in the US, while wines from the European Union are also subject to a 10 per cent tariff after Trump announced a 90 day pause on the initially higher tariffs on the EU. Because there are a number of factors to account for – how much of the increased cost importers will pass on to consumers, the effect of a global trade war on foreign exchange rates, and whether consumers will start to switch to domestic wines – it is hard to predict how this will affect Australian wine exports to the US in the short-to-medium term.

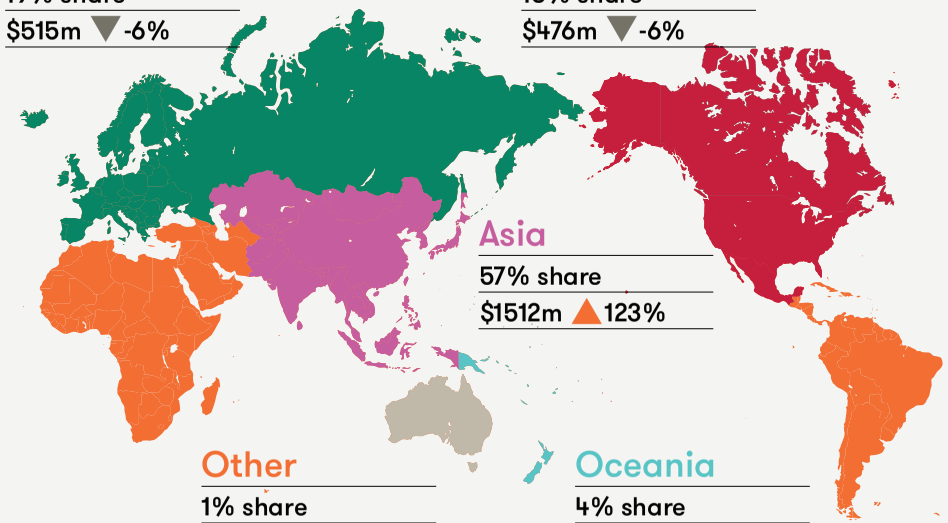
For more information, refer to Wine Australia's Export Report and Wine Australia's Export Dashboard.

Wine Australia Market Insights

Export Report

1 April 2024 to 31 March 2025

Total value	$2.64b	▲ 41%
Total volume	647m litres	▲ 6%
Average value	$4.09/litre	▲ 33%



Exports by price point (value)

$10.00 +	$1311m	▲	98%
$7.50–$9.99	$130m	▲	30%
$5.00–$7.49	$228m	▲	31%
$2.50–$4.99	$527m	▲	9%
< $2.50	$447m	▼	-1%

Top 5 export destinations (value)

Mainland China	$1028m	▲	++
United Kingdom	$353m	▼	-3%
United States	$323m	▼	-9%
Hong Kong	$154m	▼	-47%
Canada	$151m	▲	3%

Top 5 export varieties (litres)

Shiraz	178m	▲	25%
Chardonnay	139m	▼	-5%
Cabernet Sauvignon	98m	▲	13%
Pinot Gris/Grigio	42m	▼	-10%
Merlot	37m	▼	-10%

58% of wine produced is exported

120 export destinations

1,836 active exporters

22,057 different products exported

16.5 million glasses of Australian wine enjoyed overseas each day

Murray Valley
Winegrowers

iDC

Murray Valley
Winegrape Industry
Development Committee