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Behind the Bottle: How Wine Australia winning back global markets

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Following removing Chinese import tariffs in early 2024, Australian wine has seen a significant resurgence in key international markets, especially in the premium segment. Paul provides detailed insights into the factors driving this growth, including Wine Australia's efforts to diversify its markets amid ongoing global oversupply, support mechanisms for smaller exporters, and the organisationâ??s forward-looking strategies for emerging markets such as Southeast Asia. In this exclusive interview, Paul Turale, General Manager of Marketing at Wine Australia, shares the strategic approaches and market dynamics shaping Australian wine exports' recent rebound and evolution. He also discusses the shifting trends between bulk and packaged exports and how Wine Australia is navigating the challenges of a complex global trade environment while ensuring the ongoing relevance of Australian wine.

What were the most influential strategies or factors that led to the substantial growth in export value, especially within the premium category, over the last year?

The growth in total global exports was driven by high levels of shipments to mainland China, illustrating significant pent-up market demand after the removal of import tariffs on Australian bottled wine in March 2024. Subsequent winery and export activities, including a major roadshow and participation at significant wine-related events (including Prowein in Shanghai and the Chengdu Wine Fair), have further elevated Australian wineâ??s awareness and re-engagement with trade and Chinese consumers. Re-establishing and growing Australian wineâ??s specialist trade and educator network will deliver ongoing benefits.

Considering the strong rebound in export value to mainland China, how is Wine Australia approaching the balance between focusing on the premium market and tackling the persistent issue of domestic wine oversupply?

Despite a very positive headline export result driven by an exceptional full yearâ??s trading back with China, stubbornly high global stock levels coupled with increasing economic uncertainty continue to negatively impact trade and consumer sentiment and are evident with the continued softening of exports to other established and emerging markets around the world. As we all try to navigate and adapt to the unknown, risk mitigation is paramount. In the world ofÂ wine,Â that means a strategy based on delivering market diversification, playing to our relative strengths, and capitalising on opportunities as they present.Â WineÂ AustraliaÂ continues to invest in and facilitate activities across all regions (including the domestic market) to drive awareness, preference and ultimately demand forÂ AustralianÂ wine.Â WineÂ AustraliaÂ also provides detailed analyses of market opportunities to all levy payers via ourÂ interactive dashboardsÂ so that wineries and exporters can make more informed business decisions based on fact. Ultimately, these decisions will impact future supply/demand position, noting thatÂ AustraliaÂ does not operate in a vacuum, and is significantly impacted by oversupply coming from the worldâ??s largest volume producing countries.

Given the ongoing decrease in exports to key Western markets such as the US, UK, and Canada, what initiatives are being implemented to boost demand or reposition Australian wine in these regions?

Itâ??s less about repositioning and more about making the quality and diversity of Australian wine better understood by drinkers globally. All in-market activities are designed to reinforce these key points and build local relevance for Australian wines on more wine drinking occasions. These may be in person such as Annual Trade Tastings (England, Scotland, Ireland), Prowein (Europe, India and China), Vinexpo (Europe, Asia and India*), TexSom (USA), La Grande Degustation (Canada), etc or virtual such as our well-established virtual tastings that were established during Covid and remain in high demand. In conjunction with Austrade.

How is Wine Australia providing support to smaller or newer exporters, particularly noting the increase in the number of exporters to the UK despite an overall decrease in volume?

Notwithstanding previous answers, Wine Australia provides timely and relevant data and insights to inform better decision making and potential markets of interest that align with the relevant strengths of wineries/exporters. We also offer a direct â??ask an analystâ?? service to assist wineries seeking assistance. As detailed in other answers, Wine Australia also facilitates a strong calendar of activities that enables smaller wineries to participate under the national umbrella. Our Annual Trade Tastings (ATTS) in the UK and Ireland are geared specifically to support smaller and new-to-market wineries.

Interestingly, in the UK, Australian wine has traditionally held a market-leading position within the retail (off-trade) channel. It is worth noting that many larger producers export bulk to the UK for local bottling for predominantly economic benefits. Pre-Brexit, this stock also supplied EU customers, but this has changed with bottling now also occurring within the EU and this is likely impacting the volumes reported, along with a broader softening of the market across the region.

On a positive note, the emergence of more exporters to the UK may mean a more concerted effort for smaller producers seeking to replicate our retail success in the on-trade (restaurants and bars).

Beyond China and traditional Western markets, are there any emerging markets that Wine Australia identifies as crucial for future growth?

Our interactive dashboards provide an in-depth analysis of market opportunities, and we target resources and activity accordingly. Southeast Asia has shown steady growth over the past five years and is an emerging opportunity that weâ??re keen to grow. Wine Australia runs an extensive education program across the wider Asia region, based on the â??Australian Wine Discoveredâ?? platform, and delivered directly via Wine Australia staff and selected third-party educators to ensure local relevance and appropriate language for delivery. Modules cover varieties, regions and â??foundationsâ?? of Australian wine and are available in English, Traditional Chinese, Simplified Chinese, Indonesian, Japanese, Korean, Thai and Vietnamese.

Could you share your perspective on the shifting trends between packaged and unpackaged wine exports and what these trends suggest about global consumer preferences?

Changes in bulk v packaged are unlikely to be driven by consumer preferences. The move to higher bulk (generally at lower price points) shipments is economically motivated, with the added benefit of a reduced environmental footprint when bottled in market, removing the packaging (usually glass) component from the shipment.

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