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Vintage 2001 - the new order emerging?

LAWRIE STANFORD

Manager, Information & Analysis



Australian Wine and Brandy Corporation

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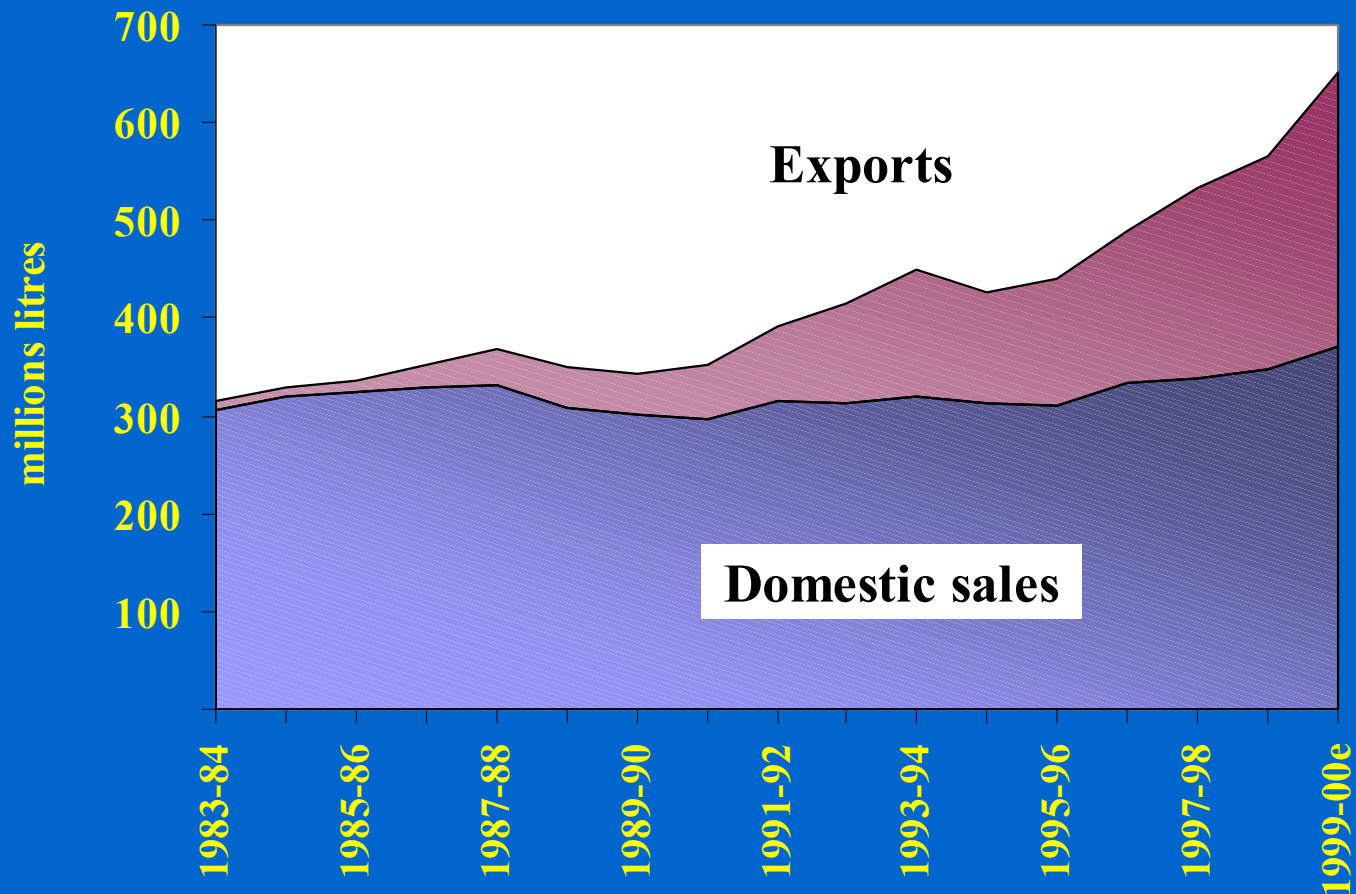
To be discussed today ...

- World wine context
- Success (?)
- Supply challenge
- Adjustment - grape growing
- Adjustment - winemaking

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Firstly ...

Fundamentals

Sales of Australian wine ...



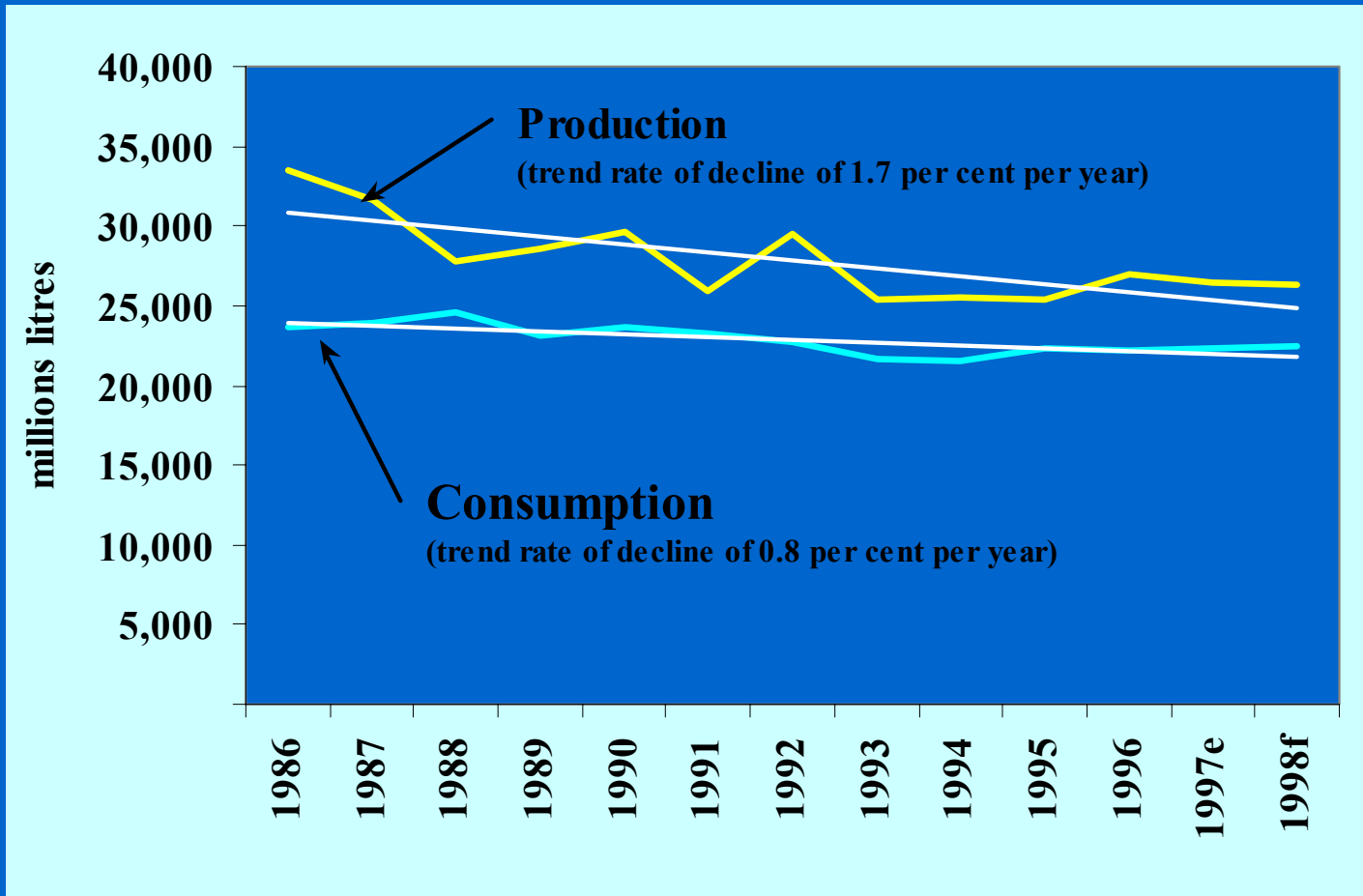
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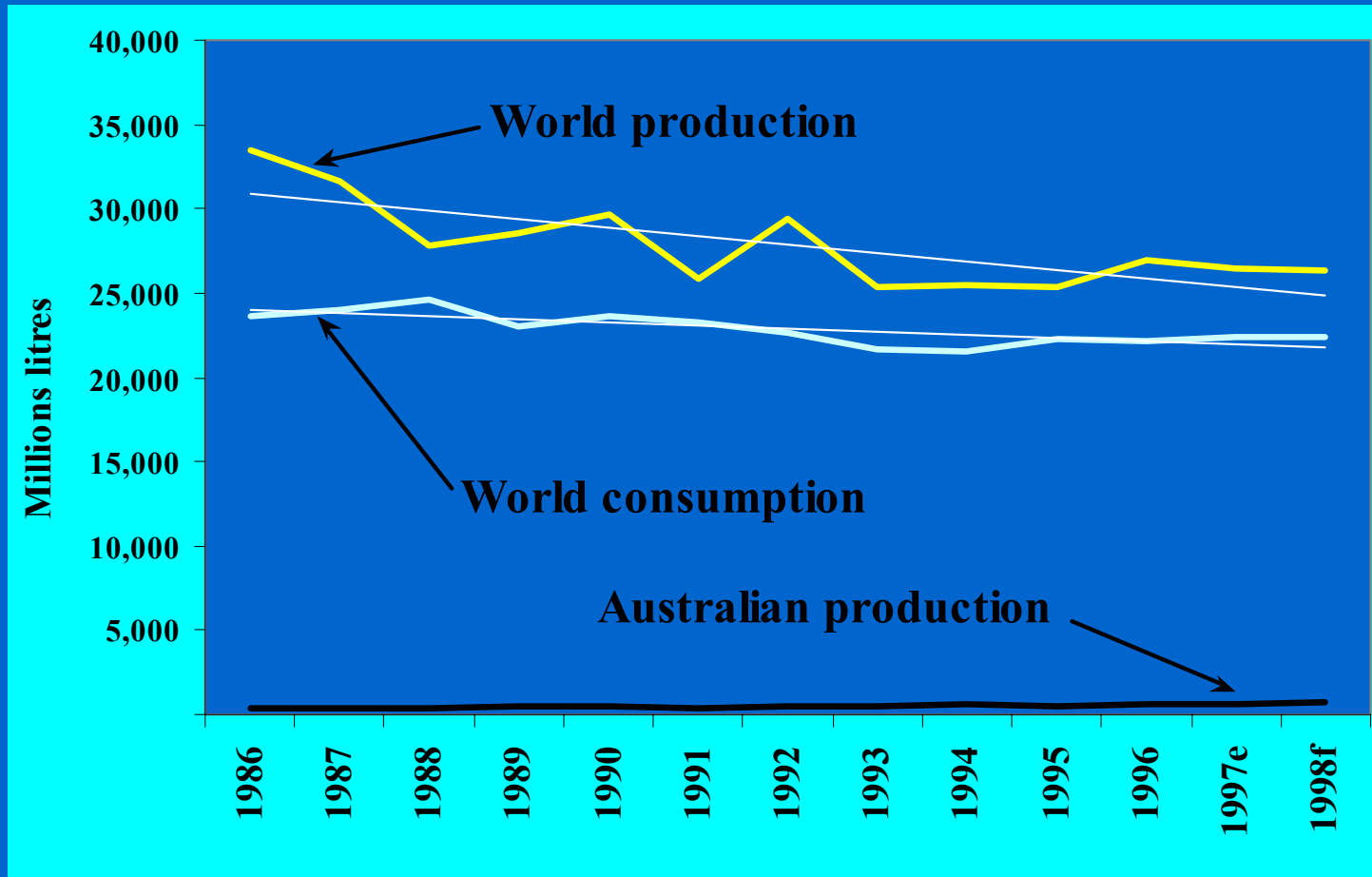
The context ...

World wine

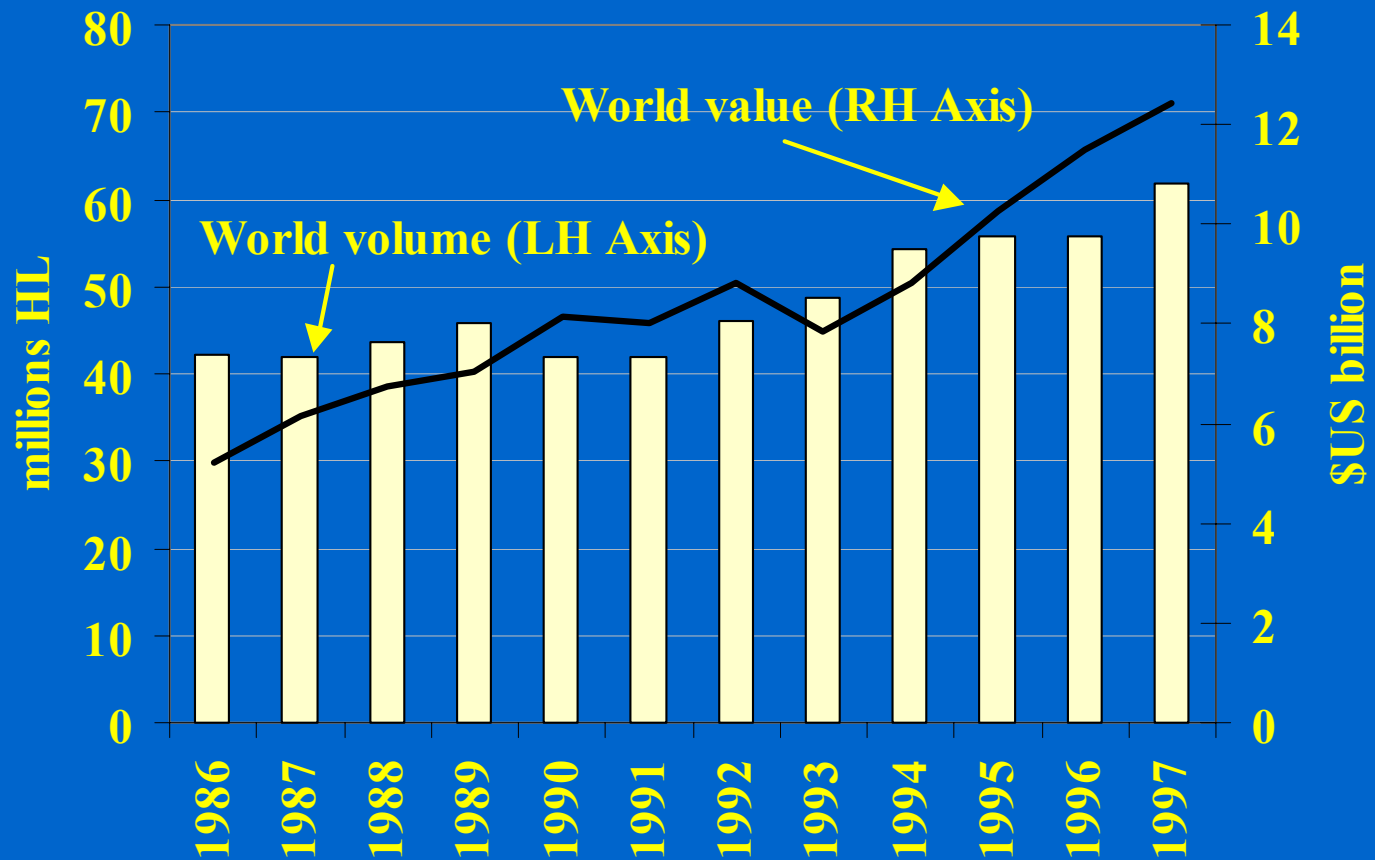
World wine balances



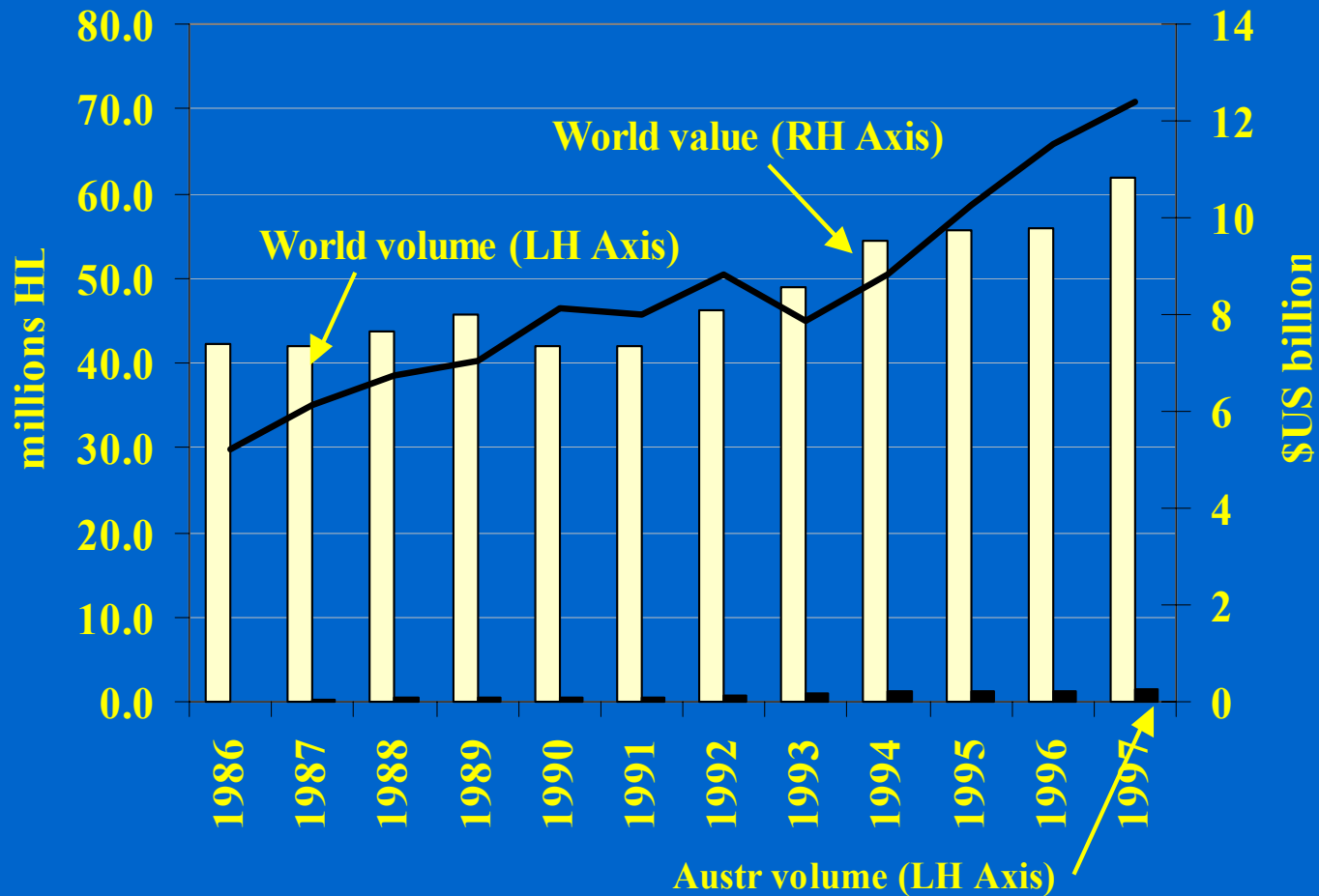
World wine balances



World wine trade ...



World wine trade ...



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Australian wine competitiveness

- Acceptability of new world wine
- Responsiveness to consumer tastes
- Branding
- Resource and technical innovation
- Low cost structure
- Common-good activity



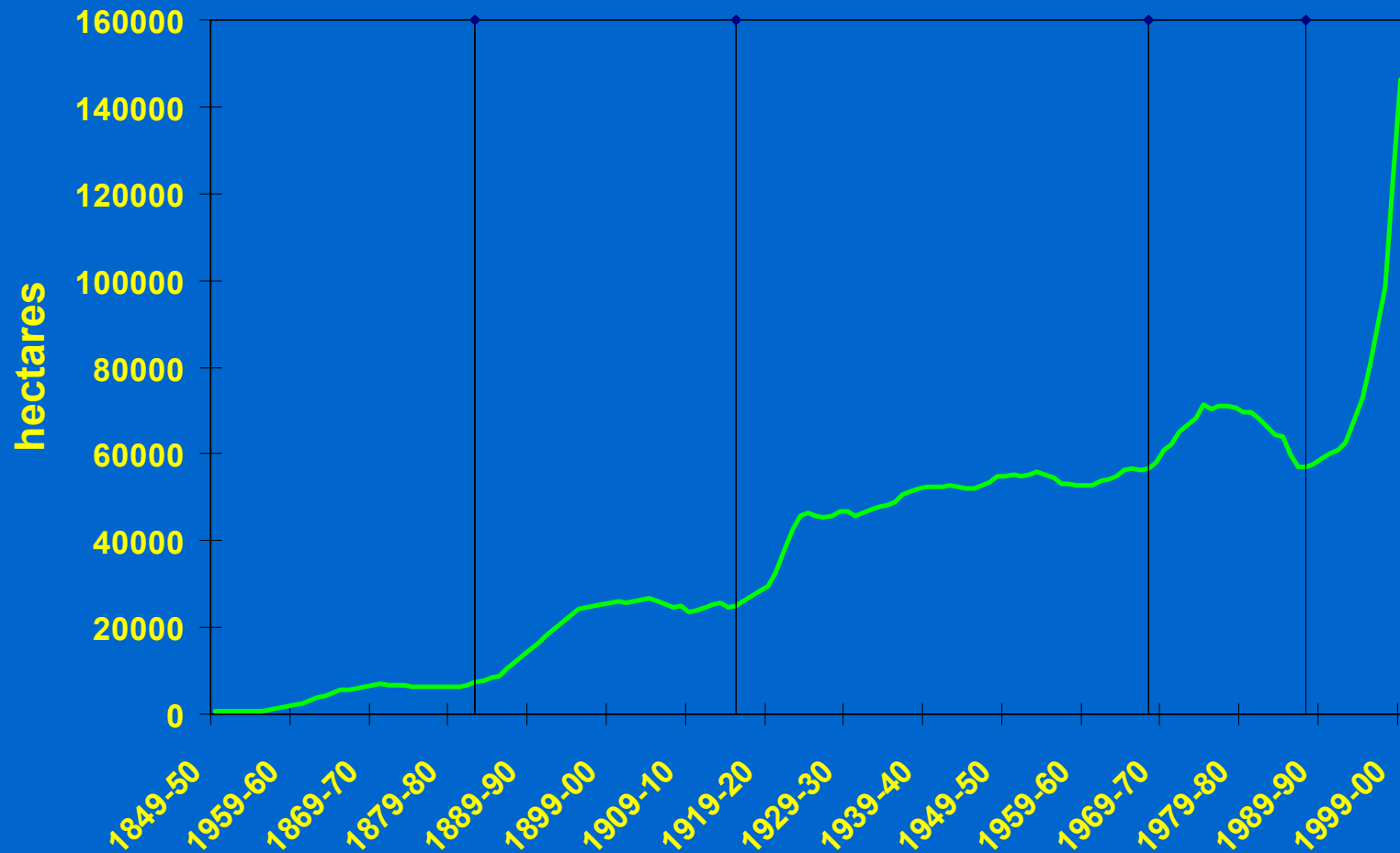
Past goal-setting

The vision is that by 2025, The Australian Wine Industry will achieve \$4.5 billion annual sales by being the world's most influential and profitable supplier of branded wines, pioneering wine as a universal first choice lifestyle beverage.

STRATEGY 2025

The Australian Wine Industry

Australian vineyard bearing areas



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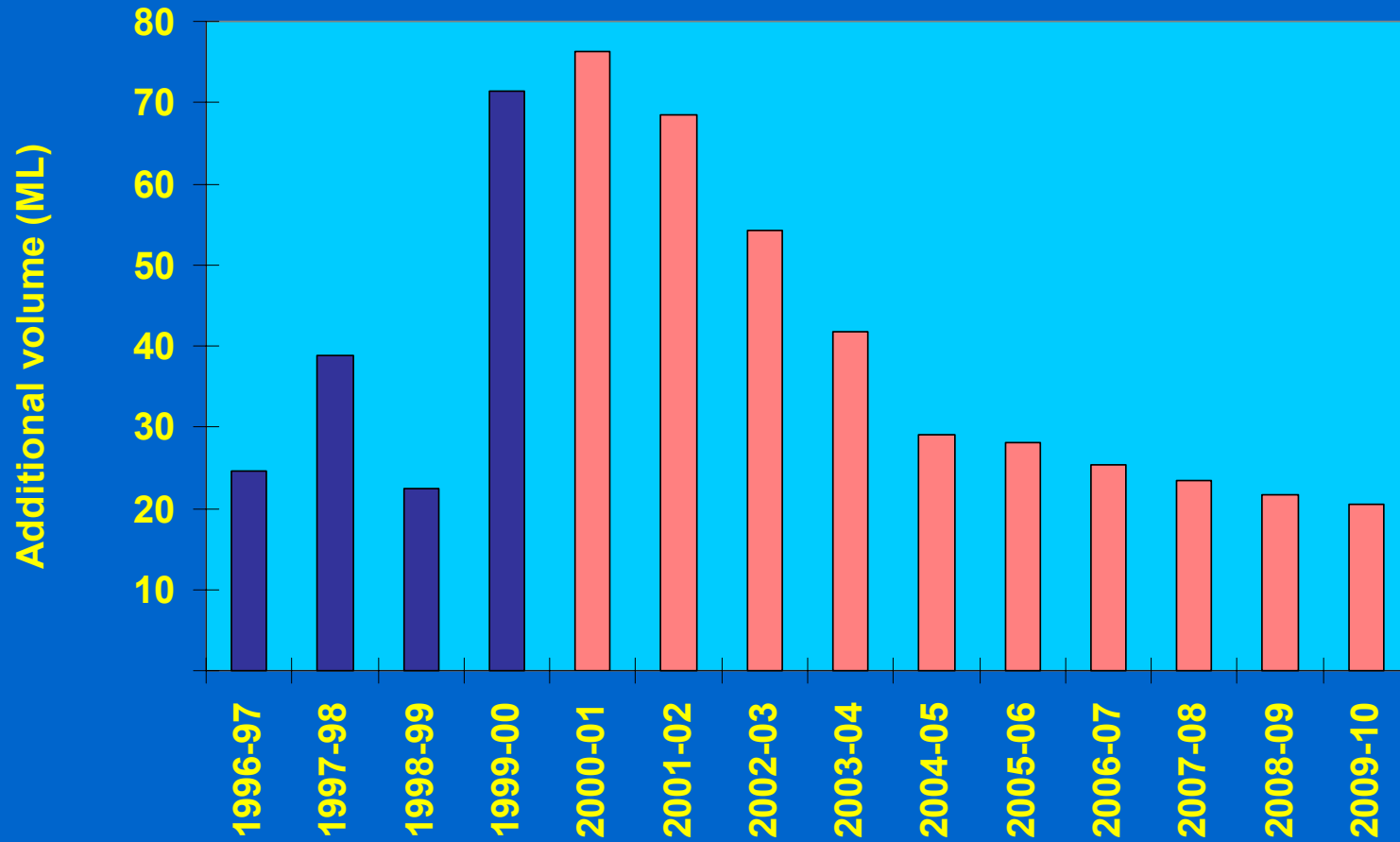
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Issue ...

Supply challenge

Total sales, past and future ...



Additional wine available for export ...

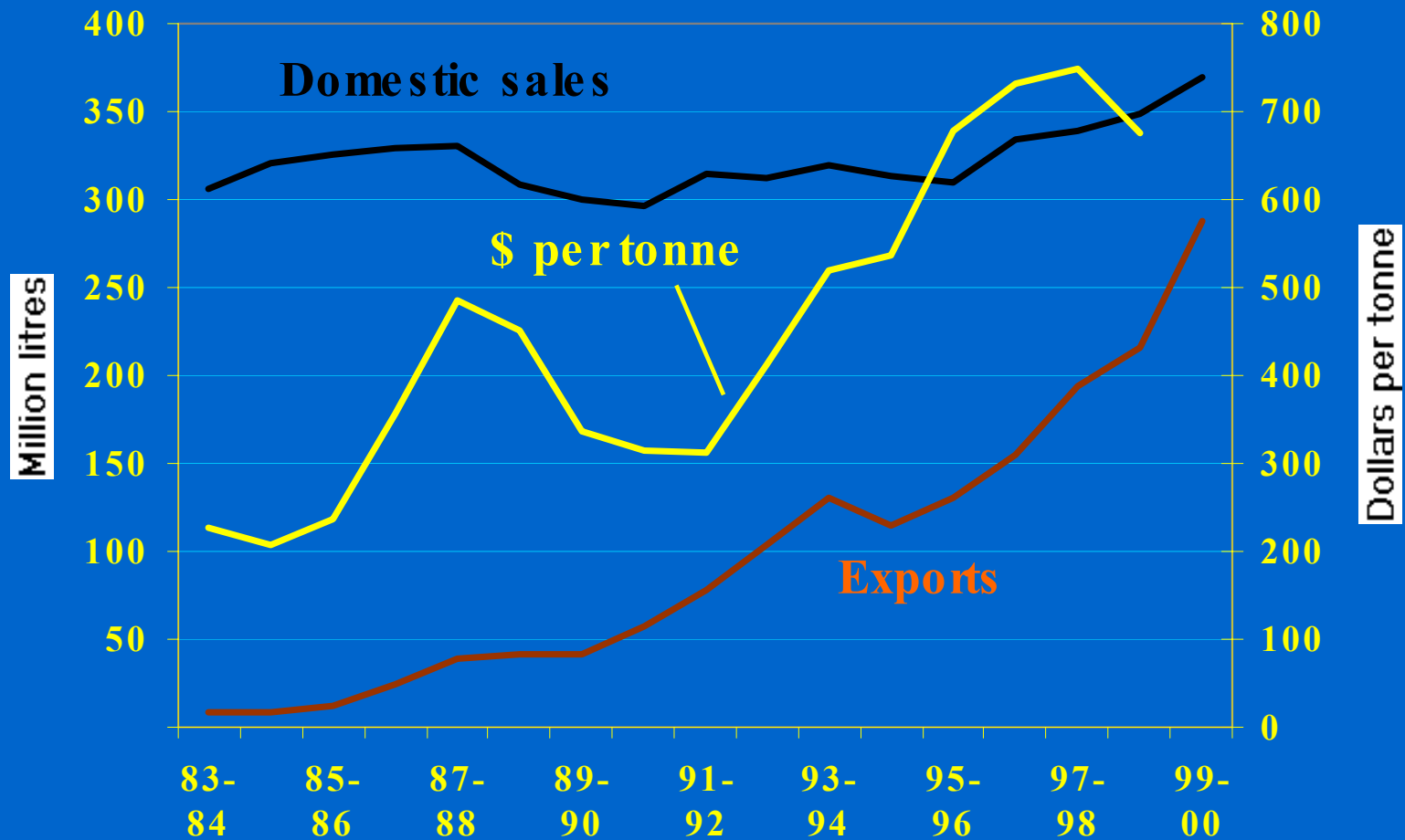


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Industry adjustment ...

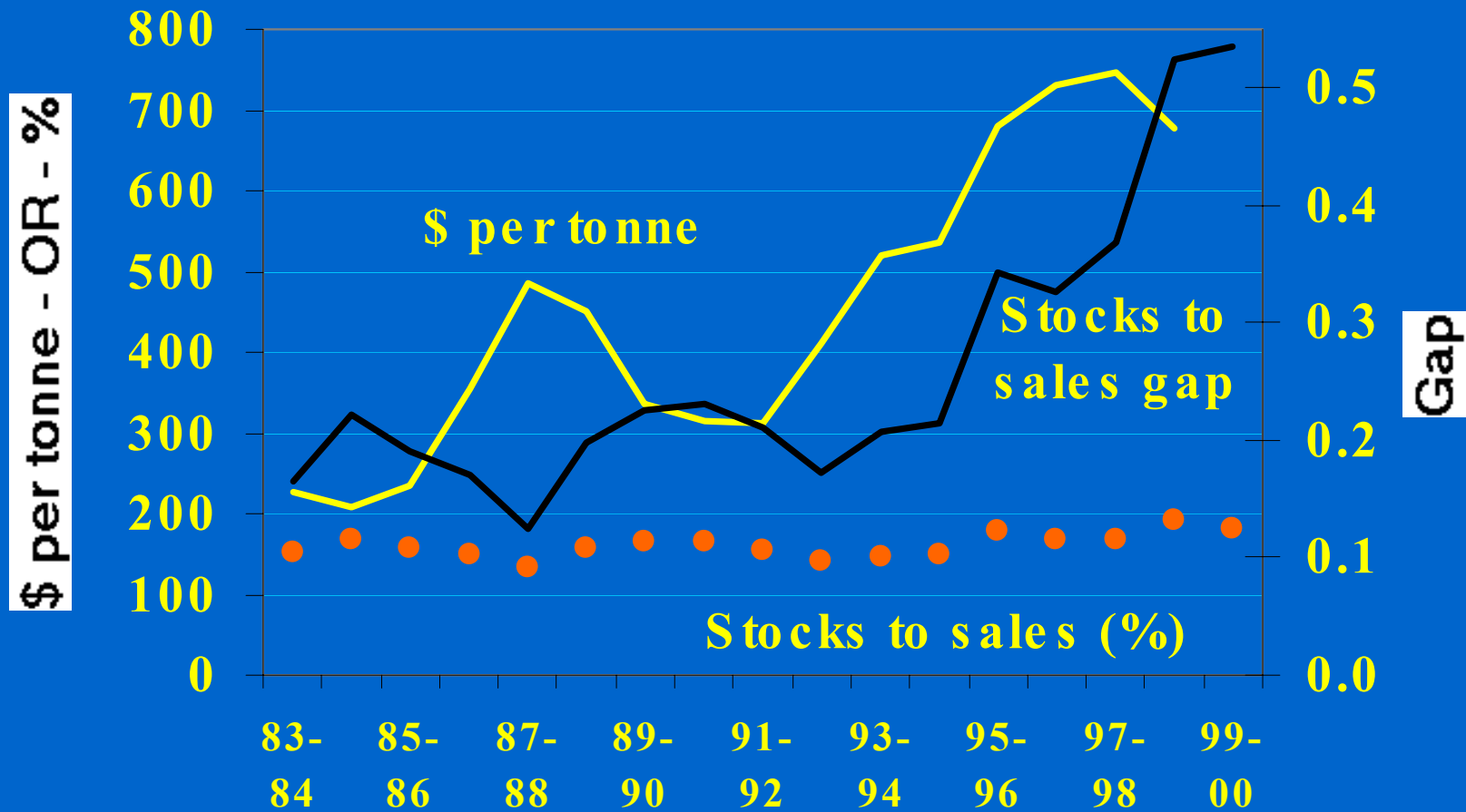
Winegrape growers

Relevant history ...

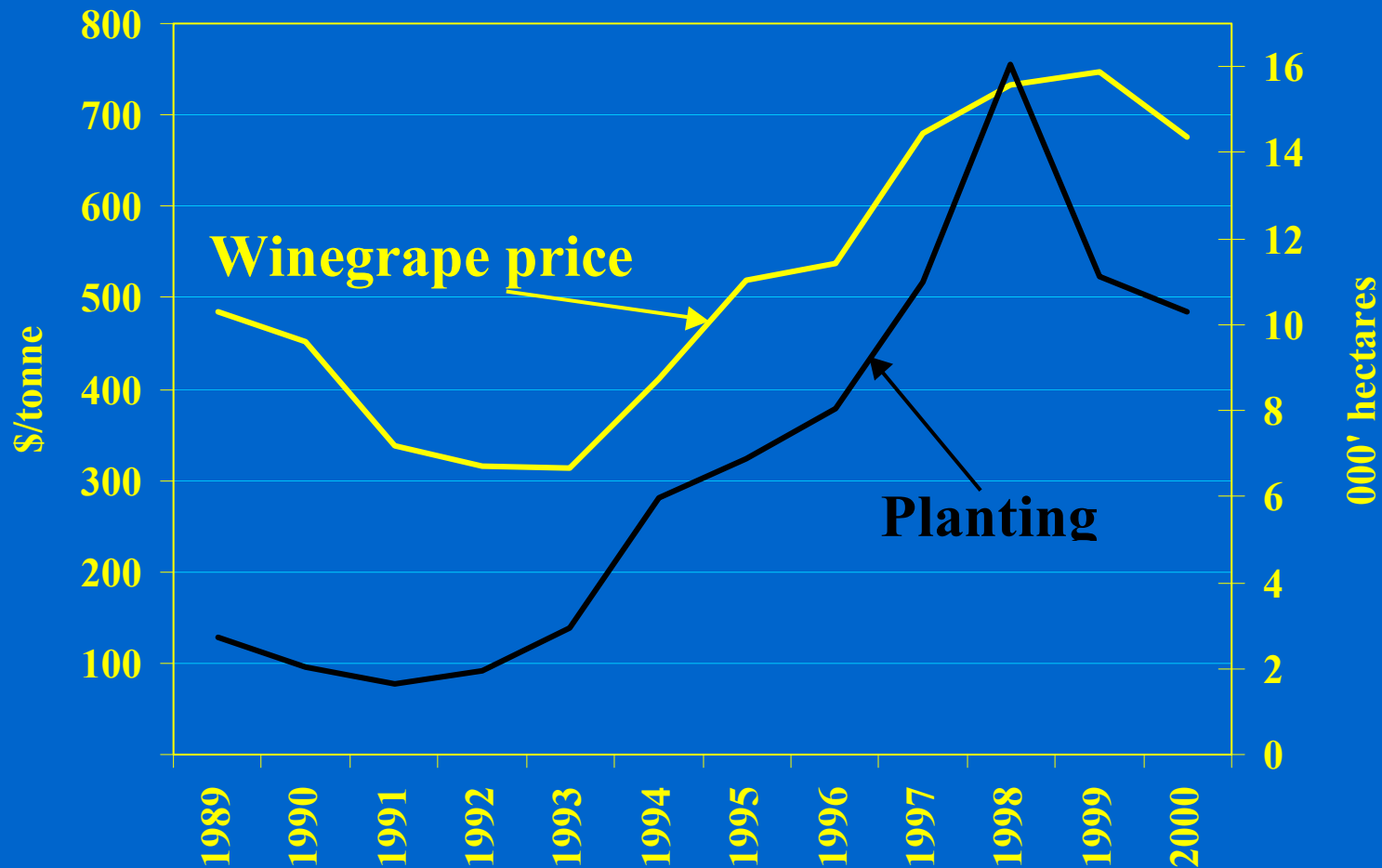


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Industry report card ...

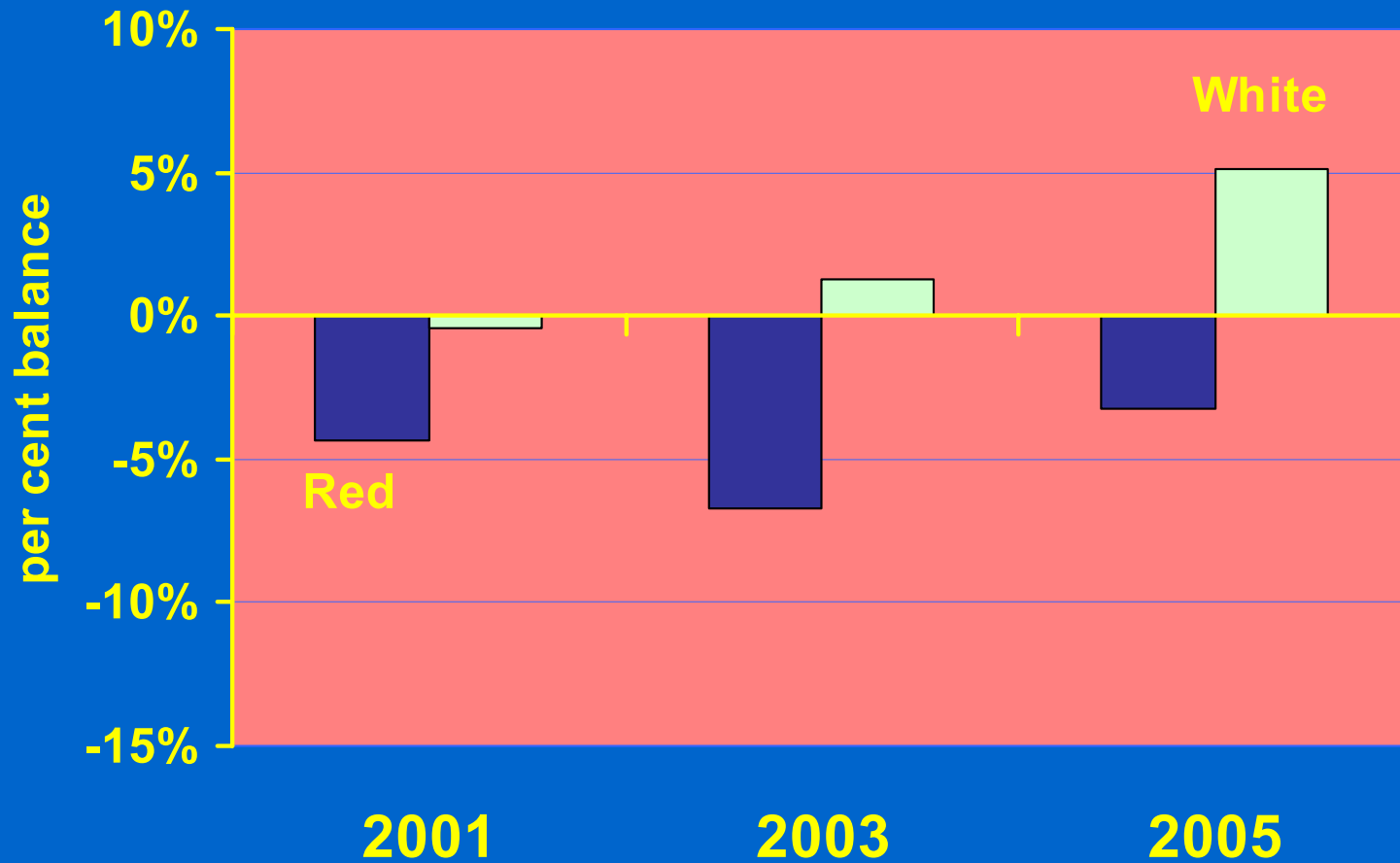


Planting and prices ...

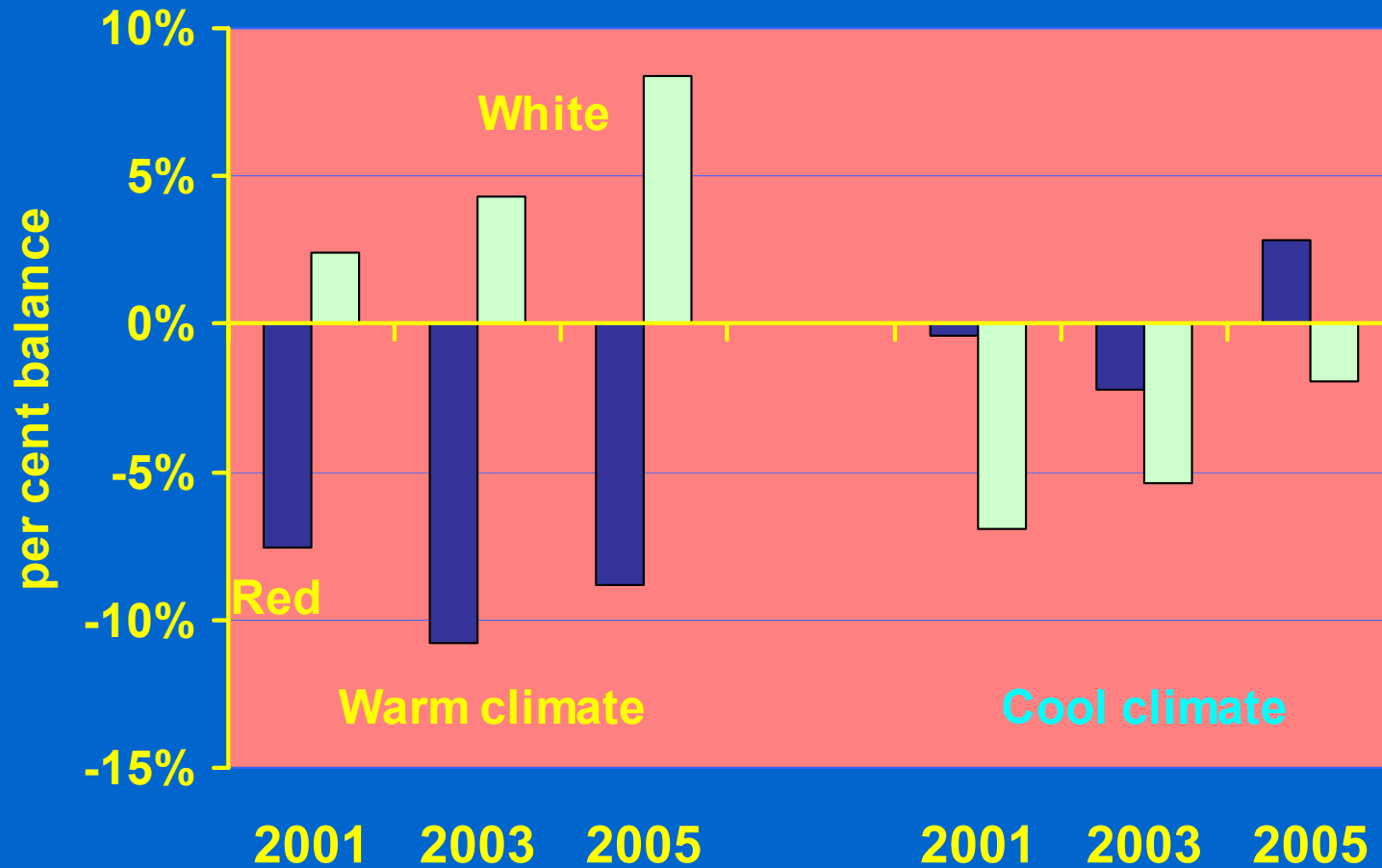


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Winemakers' prefer ...



Winemakers' prefer...



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Industry adjustment ...

Winemakers



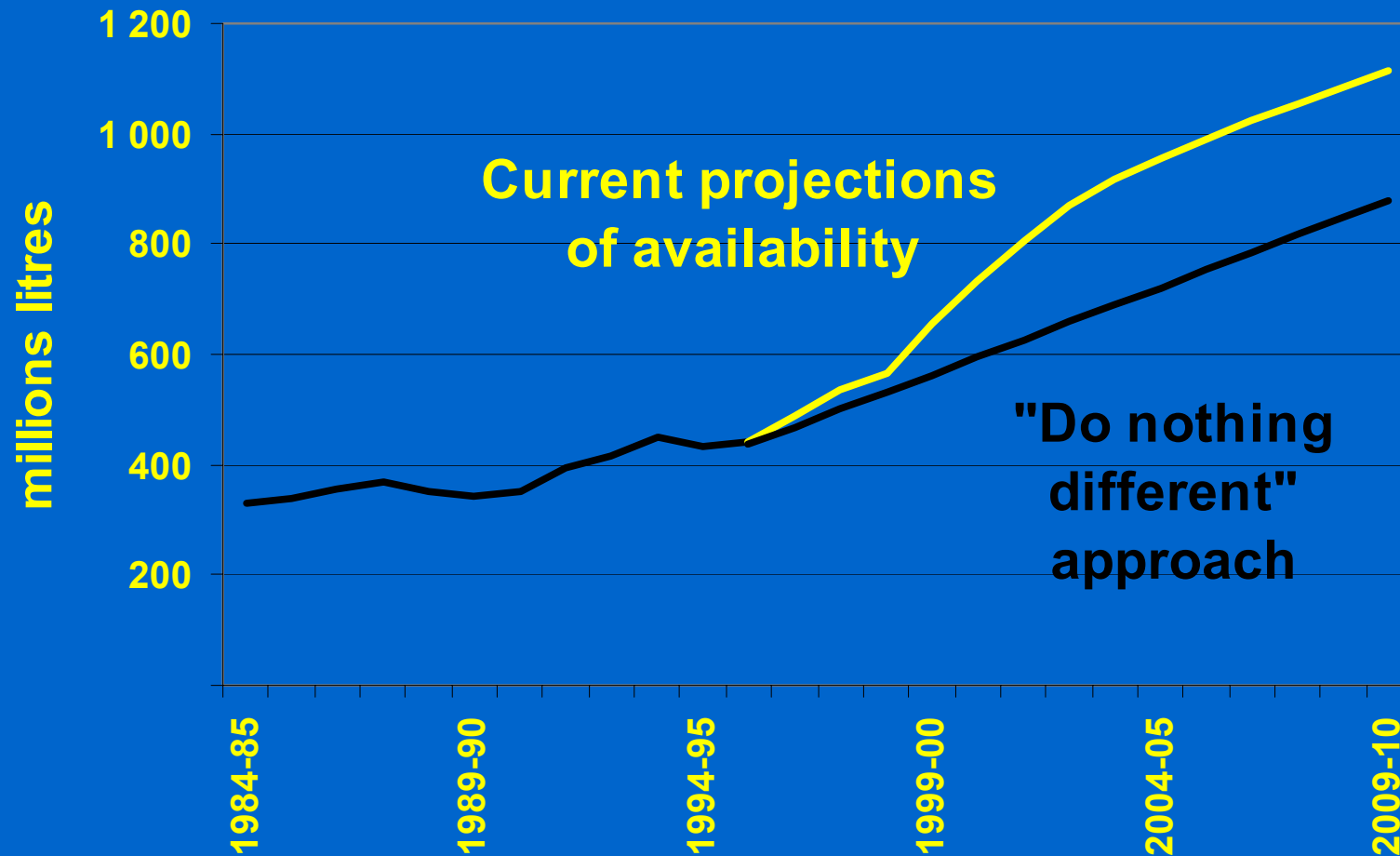
The Marketing Decade

Setting the Australian Wine
Marketing Agenda 2000 » 2010

This is the Marketing Decade

*Winemakers' Federation of Australia
Australian Wine and Brandy Corporation*

Role of a marketing strategy ...



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The Marketing Decade: Strategies

- * Market environment
- * Promotion
- * Product offer
- * Markets
- * Market perception
- * Profitability
- * Wine tourism

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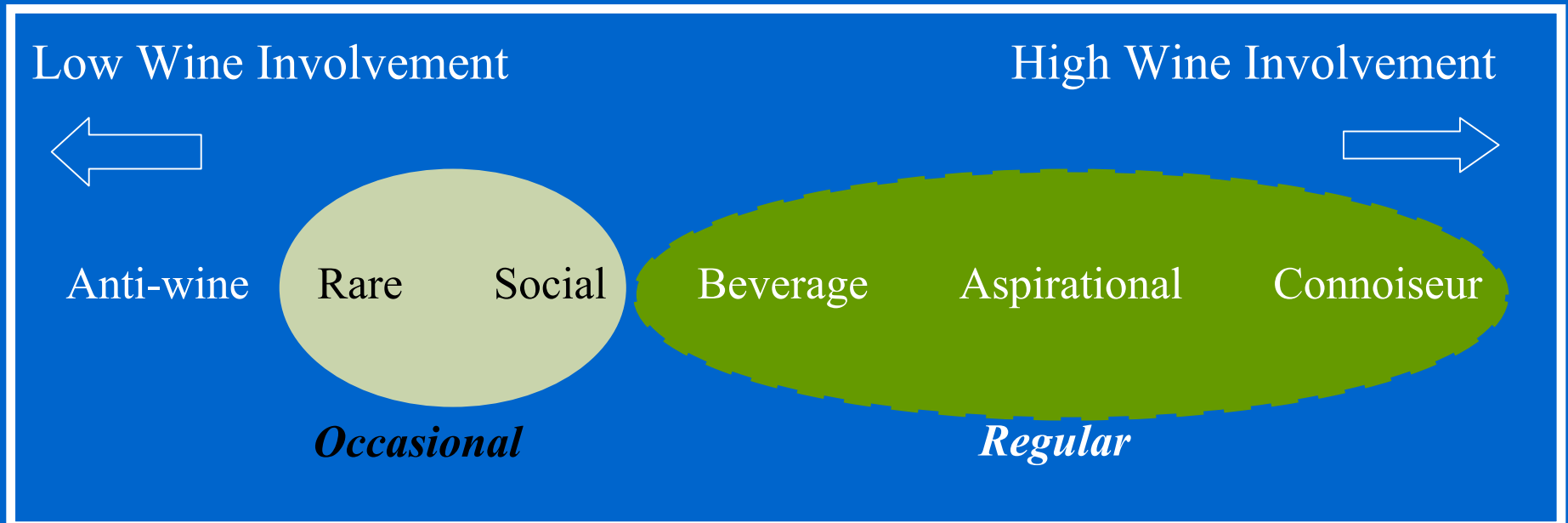
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The Marketing Decade: Strategies

- * Market environment
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- * Wine tourism

Australian Market Opportunity

Consumer Segments



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International market prospects ...

- Germany Niche
- Japan Niche
- USA Volume
- Canada Volume
- Switzerland Volume
- UK Category segmentation

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In sum ...

- New phase for industry
- ST supply challenge
- LT premium positioning
- Marketing focus