

# BAROSSA

## Ecosystem & Impacts Review





A close-up, high-contrast photograph of a cluster of dark red grapes, showing the texture of the skins and the small stems.

# Elements

01. **2004 - 2019**  
How has the outlook played out?
02. **2015 - 2019**  
The Barossa Wine Industry
03. **Wine Value Chains**  
Much more than vines and wineries
04. **Industry and Community Ecosystem**  
Assets, Resources and Capabilities
05. **What are the challenges, the opportunities**  
Barriers, Opportunities, Diversity

# Context for Wine Industry Impact Review 2004

*Same Place, Another Time*

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2004 – MIS, Large format wineries, “sunshine in a bottle” epiphany – how to prepare and scale up?

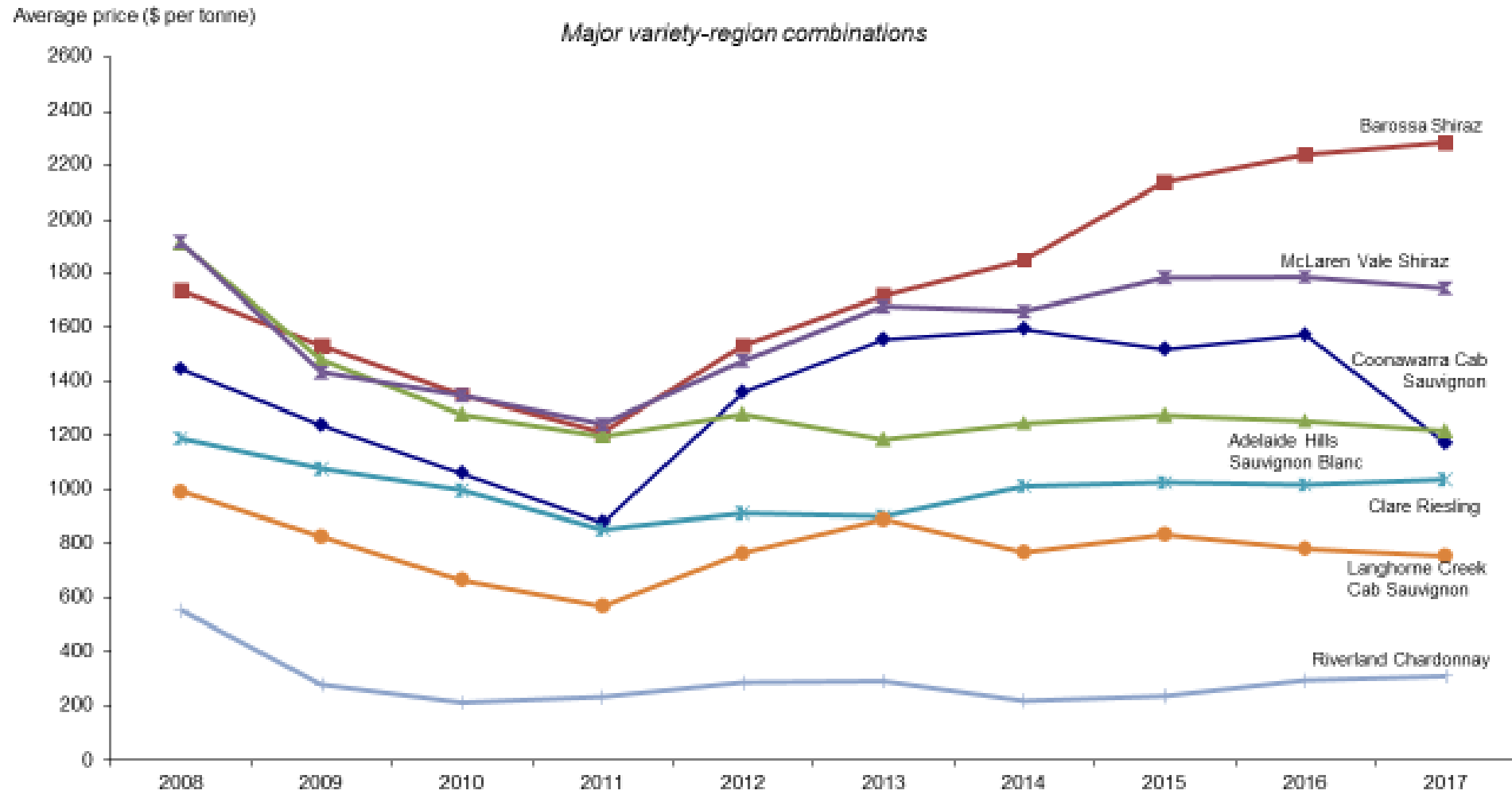
2019 – Growth in value, consolidation, international investment, markets disruption, China’s thirst, free trade agreements, currency volatility, climate change, reuse water, generational change, digital media and e-commerce, provenance and “local” focus, competition, consumer demands “more than wine”, disruptive shifts.....



# State summary



## Historical weighted average prices – 2008 - 2017





# Transitions in Production



**Red** planting **increased by 75%**

**White** planting **decreased by 32%**

**Total** planting **increased by 43%**

Red /white planting ratio is **86%/14%**

Barossa red crush **increased by 65%**

Barossa white crush **decreased by 46%**

Grape value **increased 70%**

Value per tonne **increased 38%**

The share of **Shiraz** crush **Barossa Valley** changed **from 38% to 64%**

# Transitions in Export

**China dominates  
Barossa wine  
export**  
while **UK, US,  
& Canada**  
lost presence  
in export

Barossa Top five export countries	2009		Barossa Top five export countries	2018	
	Value ('000 AUD)	Share (AUD)		Value ('000 AUD)	Share (AUD)
United States Of America	\$ 26,686	26%	China, Pr + Hong Kong	\$99,308	56%
United Kingdom	\$ 16,232	16%	United States Of America	\$13,966	8%
Canada	\$ 13,848	14%	United Kingdom	\$11,177	6%
China, Pr + Hong Kong	\$ 10,724	10%	New Zealand	\$9,266	5%
Switzerland	\$ 5,809	6%	Canada	\$7,275	4%
Top five countries total	\$ 73,299		Top five countries total	\$140,992	
Total	\$102,421		Total	\$178,561	

# Building our future from here....

*Be a part of the future you want to see...*

- Resilience
- Diversity of Opportunity/Jobs
- Multi-generational governance
- Strong Culture and Community
- Innovative Capacity
- Landscapes and Resources
- **Barossa Distinctiveness**



**A Contemporary  
Barossa true to its  
heritage**

O u t c o m e

## 2019 Barossa Ecosystem & Impacts Review



### » **Comprehensive Data**

A report on shifts from 2004 – 2019 with social and demographic data, infrastructure assessment and analysis of impacts and influences

### » **Consultation and Input from the Wine/ Food/Tourism Value chains & community**

Barossa Think Tank 2019

### » **A framework for implementation**

Barossa Think Tank 2019

### » **A Strategy Document for the Future**

Barossa Ecosystem & Impacts Review 2020



What we know

Wine

Food and  
Agriculture

Tourism

Engineering

What is emerging

Professional Services

Education

Creative Industries

Agricultural  
Technology

Equine

Community Services

# Economic Diversity



What do we need

Water

Facilitative Planning

Quality built  
environment

Transport solutions

Scale

Market penetration

What could be?

**YOU TELL US**

## *Inform yourself*

The Ecosystem Review is an attempt to collate known data and analyse it to better know where we are

## *Contribute Ideas*

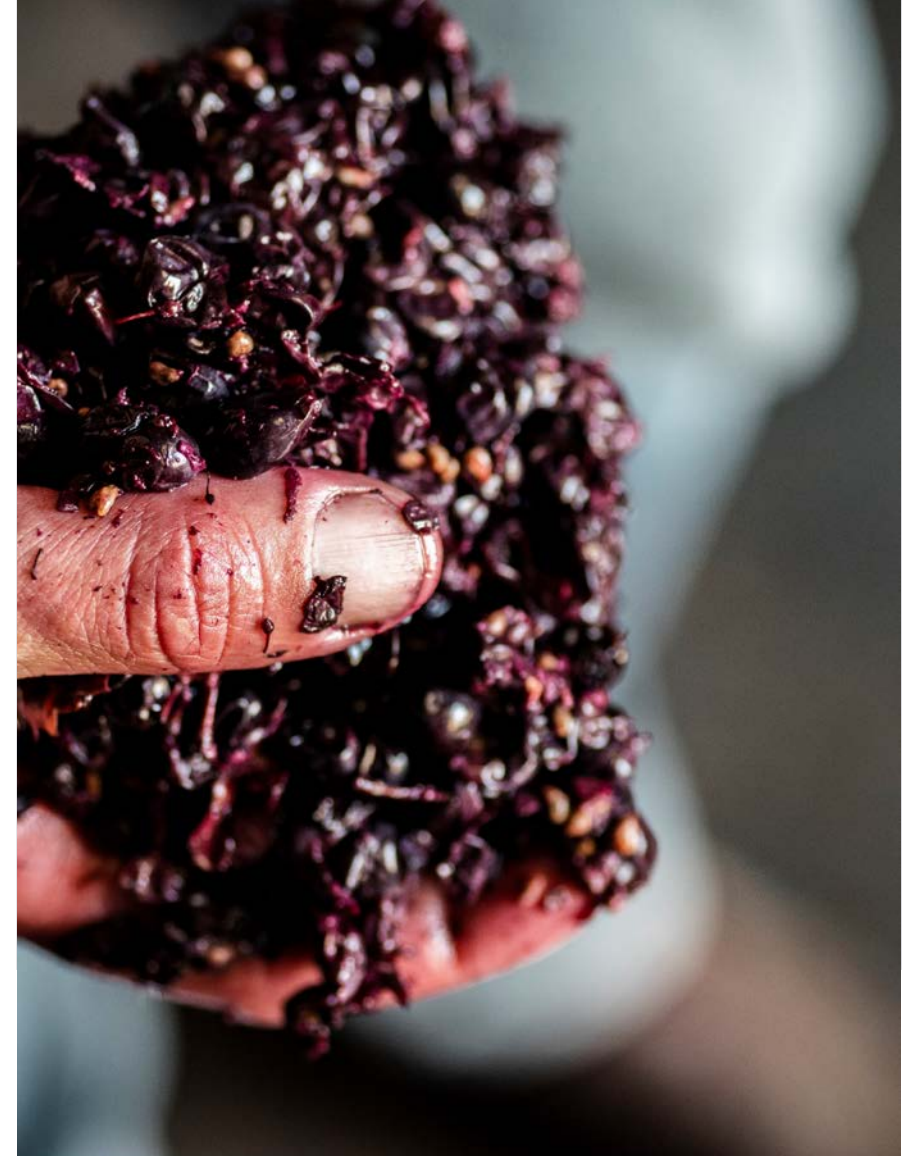
**What are the big ideas for the future?  
What are the new opportunities? What  
can you imagine? What is our diversity  
and our distinctiveness?**

## *Think*

How do we as a region best organize ourselves to mastermind our future and resource the actions?

## *Contribute to the outcomes*

*Be part of the change you want to see*





**Identify issues**

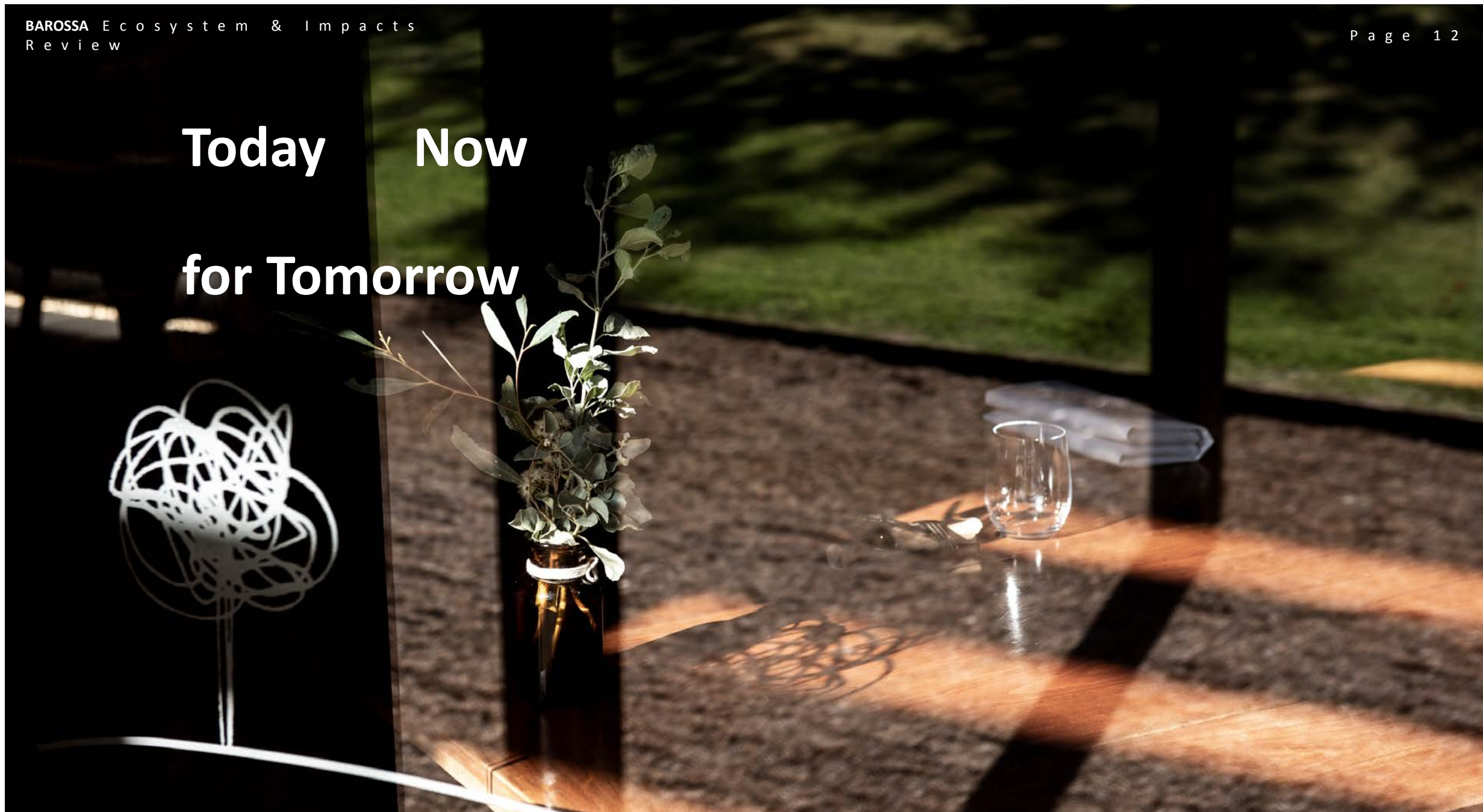
**Generate Big Ideas**

**Prioritise Issues and  
Actions on the Big Ideas**

Make informed decisions for our future



# Today Now for Tomorrow



## ***Today***

Welcome

## ***Keynote***

Overview of the Review

Consumer Insights

The Barossa Wine

Industry

Coffee Break (upstairs)

Curated round tables  
discussion (3)

where you will capture  
your ambition and ideas  
for Future Barossa and  
your role within it

Drinks (Barossa Campus  
upstairs)

# Agenda

## ***Tomorrow***

***Recap – directions and  
priorities***

*Round Tables:*

The Plan

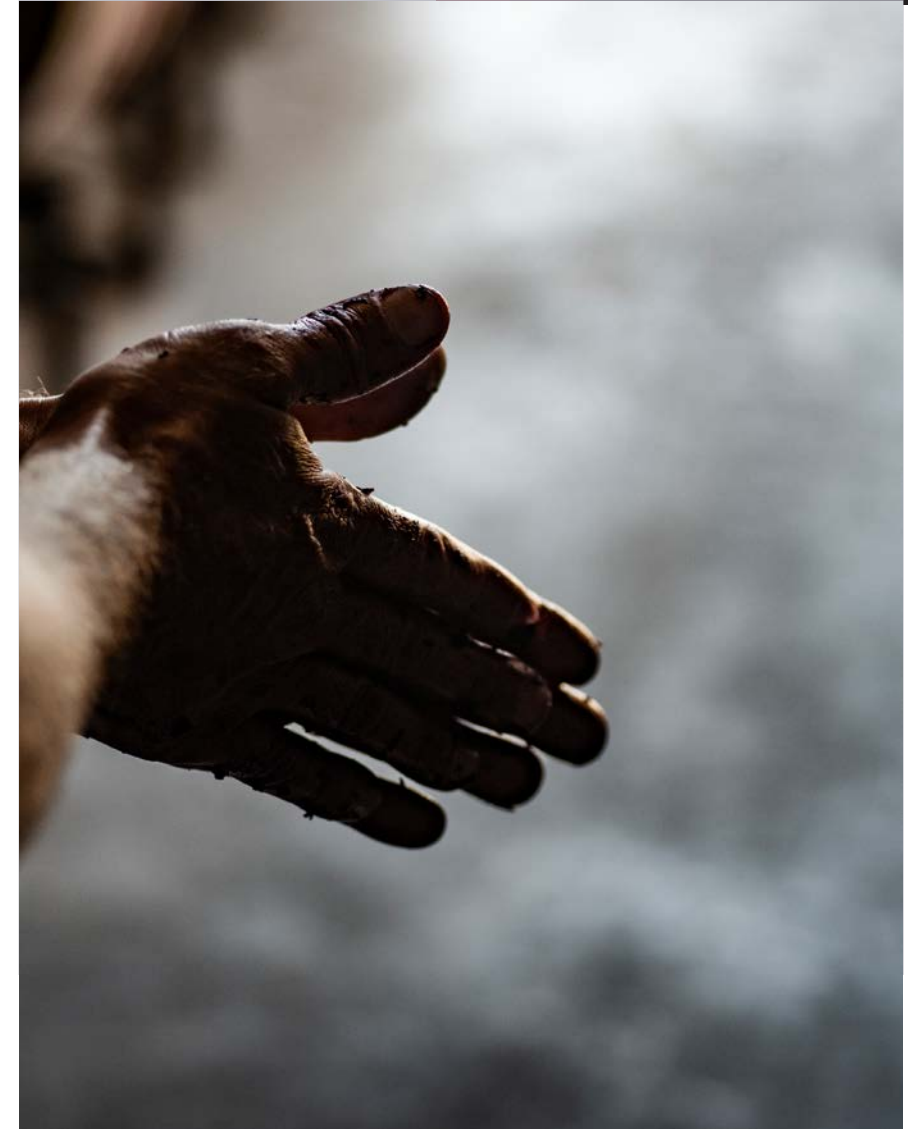
Coffee break

What structures, what  
skills, what governance  
will deliver this Plan

What's next

Close

Lunch





# The Barossa Partnership