CLARE VALLEY WINE & GRAPE ASSOCIATION 2018 - 2023

CLARE VALLEY

The Methodolgy

To develop the Clare Valley Wine & Grape Association (CVWGA) Strategic Plan, the following Methodology was undertaken:

- 1. Frame outline Scope for Strategic Project
- 2. Tender -and Assessment of Proposals
- 3. Engage Strategic consultant
- 4. Develop full scope in consultation with key stakeholder, including CVWGA Executive Officer & selected Board members
- 5. SurveyMonkey to wider CVWGA community (members) re: key issues, opportunities they would see as focal points for the organisation
- 6. Build & facilitate a members group feed in session
- 7. Undertake SWOT Analysis
- 8. Full day strategy session with Board Members
- 9. Produce Strategic Framework for CVWGA
- 10. Gantt Chart / Schedule of Work, for operational development & implementation
- 11. Invest in Priority Areas of the Strategy, including;
 - Water Allocation Strategy (engaged SEED Consulting)
 - Brand Story and Mix (engaged WineHero)
- 12. Finalise Strategy & present to CVWGA Board for Approval and release





OUR PURPOSE

To ensure prosperity and sustainability of our member businesses and the Clare Valley community.

We promote the interests of our members, inform them and manage collective opportunities for the betterment of the whole.





OUR VISION

For the world to know about the breadth and calibre of Clare Valley wine, about the vibrancy and offerings of the Clare Valley region, resulting in sustained profitable growth of Clare Valley wine and grape businesses.

OUR VALUES

Quality

Grapes | Wine | Region | Experiences | People

Decisiveness

We inform ourselves, weigh up options, make choices and act in the interest of our members

Sustainability

We focus on the longterm health and prosperity of our members and the greater Clare Valley region

Economic | Environmental | Social | Technical

Leadership

We will be strategic and drive positive change for the long-term betterment of our region

Collaboration

We actively work together and are stronger as a team



S.W.O.T - GRAPE GROWING



STRENGTHS

- Predictable
- Clare Valley is more than Riesling
- Soils
- Elevation
- Consistency
- Australia's Riesling capital
- Safe minimal disease
- Most things grow well



WEAKNESSES

- The high price of water
- Frost
- Access to labor
- Too far for a day-trip from Adelaide
- Grape prices



OPPORTUNITIES

- Red varieties are excellent
- Tourism will drive demand
- Diversity
- Very desirable soils (except no water)
- Ease of entry for new winemakers



THREATS

- Water access, price, security
- Climate change impacts
- Lack of infrastructure for tourism
- Lack of corporate investment
- Grapes too expensive per tonne



S.W.O.T - WINEMAKING



STRENGTHS

- Expressive terrior
- Clare Valley is known for Quality / Premium wines
- Personalised visitors able to meet makers



WEAKNESSES

- Not as well known internationally as some other regions
- SATC have focused more on primary regions
- Access to labor
- Understated
- Less producers / lower levies
- Limited commissionable experiences on offer
- Distance from Adelaide limits famil opportunities



OPPORTUNITIES

- Export be confident the world will love our wine
- Tell a consistent story about Clare Valley
- Increased appellation value
- Entrepreneurship, experimentation, research, innovation
- Local food and wine
- Leverage Riesling as a door opener
- China increasing demand from Riesling



THREATS

- Clare Valley is only 1% of Australia's wine industry
- Noisy, globally competitive market
- Increases in grape prices
- Perception of Clare Valley as a Tier 2 region
- Other regions investing more in tourism infrastructure
- Other regions have bigger marketing budgets

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THE SIX PILLAR STRATEGY

The strategy accordingly outlined six key drivers of the region's desired new features and benefits – each with a required objective – as follows:

Brand: One story about Clare Valley understood, deployed and developed in 2019.

Mix: Implement an effective Clare Valley wine marketing plan; heroing our trifecta of world class varietals – Riesling; Shiraz; Cabernet.

Regional Potential: Develop a clear, compelling picture of the regions's potential scale and scope in relation to grape planting; wine production and economic benefit

Water: Secure long-term and affordable water resource

Offering: Successfully assist the development of in-valley tourism offerings that make it more compelling for domestic and international travellers to stay and spend

Education: All members engaging with, learning from and building their capabilities through interaction with the CVWGA and its members.



STRATEGIC PRIORITY ONE: BRAND

AIM - To develop and tell "one story" about wine in the context of our region

HOW - Through data collection, engagement with industry and a brand audit. Actively engaging Wine Australia and SATC

MEASURE - To have all stakeholders telling the "one story" by end of 2019



The Brand

The role of Clare's collaborative brand is to position the region as a fine wine destination, and to add value to all stakeholders' membership and activity...

Strategy must drive brands to move beyond mere commissionable product alone(bottles of wine). Furthermore, a progressive strategy must ensure that the shared experience of a place is more than just the memory of a particular visit or tasting. Brand experiences have to capture what is distinct and evocative about a region, as well as highlight the features and feelings that make it truly unique – that is, something not replicable anywhere else in the world.

Allied to the new brand framework that recounts Clare's wine story in three distinct chapters - The Founders; The Landmarks; The Future Makers

Clare's marketing strategy should strive to convey a vivid picture of the wine landscape and its community. A stronger engagement can be built by ensuring that all of the supporting features that inform our wine endeavour are included in a Clare Valley brand experience.

Consider the following features that define us as a wine community:

- 1. Our Wine Story: The original and authentic founding voices of our story, told in three parts The Founders; The Landmarks; The Future Makers
- 2. Our Resilient Landscape: Our unique geology, topography and climate that make up our 'natural capital/economy'
- 3. Our Patient Hands: Our belief in generational farming and our collective responsibility for natural asset management and guardianship (preserve; promote; protect)



Target Markets

CVWGA recommends the following territories, markets, channels and key audiences as initial targets for the next 3 years:

Territory: Australian Domestic

Profile: Mature

Markets and channels: Consumers, Eastern seaboard on-premise, specialist chains and independent retailers

Hero Products: Riesling; Shiraz; Cabernet Sauvignon and new blends

Target Audience: Sommeliers; restaurateurs/chefs and key media influencers

Territory: Hong Kong and China PRC

Profile: HK - Maturing as a discrete market;

China PRC and Asia Hub - Emerging and Developing

Hero Products: Shiraz; Cabernet Sauvignon

Target Audience: Hong Kong trade, media and consumer; Asia trade and consumer media

Territory: USA

Profile: Developing

Markets: California; Colorado; Chicago; New York

Hero Products: Riesling and Cabernet Sauvignon and new blends

Target Audience: US on-premise sommeliers and wholesalers; independent retail; US specialist and

consumer lifestyle media; USA millennial consumers



STRATEGIC PRIORITY TWO: MIX

AIM - Develop and tell a compelling story about Clare Valley. Elevate the Clare Valley's world-class wines, shining the spotlight on the established varietal trilogy of Riesling, Shiraz and Cabernet Sauvignon.

HOW - Identifying a subset of hero brands and implementing a wine marketing plan that integrates the trilogy of world-class varietals with the quality Clare Valley ancient earth/rocks story. Launch of the inaugural Clare Valley Distinguished Sites Register and Tasting (invitation-only inductees, based on the single-vineyard representation from the current Langtons Classification VII and/or other, relevant third-party endorsement).

MEASURE - The elevation and celebration of Clare Valley provenance to international significance.



Mix

Curating a new wine story that reflects our true history as well as our future ambition is a cost-effective strategy that will deliver over short-, medium- and long-term horizons. A wine story predicated on consumer drivers for discretionary purchase is both relevant and compelling. This idea can frame our past history, our current achievements, and our ongoing evolution, ensuring it is all both inclusive and differentiated.

The reference-points for the strategy are low-cost as they draw from an existing, historical time-line (The Founders); current third-party endorsements for excellence (The Landmarks); and the emerging opportunities presented by next generation producers, and the already undergoing introduction of new varietals and blending options into the region (The Future-Makers).

Action:

- (i) Commitment to theming future trade, media and consumer tasting experiences to the streams of The Founders; The Landmarks and The Future Makers.
- (ii) An aspirational, leadership-position initiative of a 'Distinguished Sites Register' would be a strong, (re)-positioning statement for the region. Eschewing a review of sub-regional classification in favour of a non-binding, non-legislative register of distinguished vineyard sites would deliver a similar, elevating debate about regional nuance and detail, while avoiding costly and time-intensive GIC procedures.



STRATEGIC PRIORITY THREE: REGIONAL POTENTIAL

AIM - Define a clear picture of what "Clare Valley could be and achieve" related to grape planting, wine production and economic benefits.

HOW - Through development of existing vineyards and undertaking a potential plantable area study. Developing a database of existing vineyards.

MEASURE - To be able to communicate a clear plan of the growth potential for Clare Valley by 2021



Regional Potential

The Clare Valley Rocks project identified 8 areas of distinct terroir which are under-represented in comparison to plan table areas which geological warrants exploration to grow the volume pf the plantable areas. The current 2019 value of the wine grapes alone was \$21M, down from \$27M on seasonal conditions, but value-added by an economic return to the community with a multiplier of over 3 including value of manufacture and tourism. Clare Valley Wine and Grape Association will work to explore both the volume and value of the grapes grown in region.

The potential to grow this area is clearly predicated on the increased demand for Australian Wine, and Clare Wine. However at the moment the Association does not have a clearly identified assessment of expansion, database of growing value and return and an ability to assist its members in investment decisions in this space.

The strategic directions and first steps are designed to identify best practice from other wine regions and adapt to provide as a service to our existing members and potential investors in Clare Valley wine and viticulture assets in the future.



While famous for 1034 hectares of world-class Riesling, the region has significantly more Shiraz (1834ha) and Cabernet Sauvignon (1171ha) vineyards – and many famous brands and red wines. Together, these three varietals comprise almost 80% of Clare Valley's wine production.

The over representation in Langton's 'exceptional' Classification of Australian Wine VII illustrates this point with Grosset's Polish Hill Riesling, Wendouree's shiraz and Jim Barry's The Armagh. There are four icons in the 'outstanding' category, Wendouree's Cabernet Sauvignon, Cabernet Malbec, Shiraz Malbec and Shiraz Mataro and the 'Excellent' category has Grosset's Gaia Cabernet Blend and Springvale Riesling, Kilikanoon's Oracle and Tim Adams' Aberfeldy.

The combination of such high quality Riesling, Shiraz and Cabernet Sauvignon is unique and due completely to the region's terroir, a combination of elevation, climate, and very old mineral-rich sedimentary soils. These varying altitudes, to more than 600m, cause wide (diurnal) summer temperature disparity from day to night.

At 5060 hectares of vineyards, the Clare Valley is about half the area of the Barossa Valley (10,460ha) but bigger than the Yarra, Mornington and Tasmania combined.

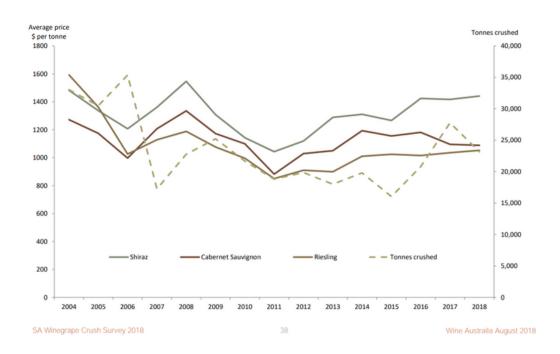
The Clare Valley wine region is dominated by small growers and winemakers that work closely together, helping to define the authenticity of the Clare Valley.

The region's wine is internationally acclaimed, listed in 5-star restaurants and aircrafts all around the world. There are over 30 cellar doors to visit, all within 40 km of each other.



Setting Future Directions

The Clare Valley Wine and Grape Association aims to grow the future by increased the recognition of Clare Valley as a premium wine and tourism area. It is also clearly to increase the value of the district weight average price for grapes which increases value to the supply chain.



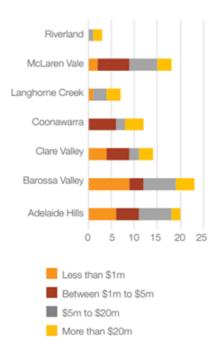


Historical weighted average price vs tonnes crushed

Currently the five year average crush was 21,509 tonnes, notwithstanding that 2019 based on seasonal conditions was 28% below the five year average and the lowest since 2000. Clare Valley has positioned itself as a premium Riesling producing region – "Heart of Australia's Riesling." However the strength of both Shiraz and Cabernet Sauvignon – both in its rise in volume of plantings, value and quality are all distinct continuing trends in the Clare Valley driving the need to promote the quality of its red wine offerings.

Similarly the slow and steady growth of tourism activities, as important value additions to our members' revenue. Our comparative business size as illustrated shows the predominance of family companies with turnover of less than \$5m and whose reliance and tourism and cellar door sales as a value add highlights Clare Valley Wine & Grape Association's need to work collaboratively to drive tourism visitation. It has also been clearly identified in consultation that luxury accommodation is required to provide in region experiences for premium adventure seekers.

Business size, by turnover FY2015/2016





In 2016–2017, the Region's visitor economy supported 698 jobs (486 full and part time jobs, and 212 Indirect full and part time jobs) which is 8% of total regional employment, another economic indicator which is seeing slow, but steady positive growth.

Overnight visitation to the Region is also steadily growing (from 160,000 in FY2010 to 182,000 FY2018), and currently attracts an average of 4% share of total overnight visitation to South Australian regions, which is fair considering it's a relatively small tourism region with two central tourism hubs (in Clare and Burra) in comparison to other tourism regions in the State.

The region itself identifies itself in a new branding:

An authentic and quintessential Australian destination renowned for its rich and immersive wine and food, heritage, cultural and outback experiences.

The region has clearly articulated that it seeks to enhance the paddock to plate / provenance culture within current experiences, and development of new, unique experiences, addressing skills shortage, activate product development of regional food producers. This brand positioning is reflected in the strategic need for differentiation of Clare Valley as both a wine and tourism region.



STRATEGIC PRIORITY FOUR: WATER

AIM - Explore and identify options for long-term sustainable and affordable water resource for irrigation in the Clare Valley. Long-term, ensure secure high-quality, fit-for-purpose water resource and an adequate distribution network.

HOW - Work closely with SA Water to develop viable transportation arrangements for members using this water for irrigation.

MEASURE - A final recommendation of the best option for secure, sustainable and affordable water resources for the Clare Valley growers.



Water Resources

The Clare Valley wine industry is experiencing growth opportunity, however decisions on local investment is subject to water availability and the pressures of a changing climate. There are various risks associated with current water supplies. Securing long term water supply that is not exposed to rapid fluctuations in availability, quality and price is regionally desirable. Thoroughly understanding the relationship between industry growth, regional social, economic and environmental factors and security of supply, quality and price is needed to underpin regional investment.

Emerging technologies, access to wastewater and sharing of infrastructure are possible opportunities to underpin this long-term security of supply, but the feasibility, impacts and future demands need to be better understood.

The CVWGA needs to consider development of a long-term plan to address water security and provide comment on review of the local Water Allocation Plan (WAP).

Prior to considering the needs of a broader strategic water security plan, the region would like a rapid review of all strategic water work completed to date. This would enable a clearer scope to be developed on what a regional long-term strategic water plan might look like, consideration of key barriers and benefits, potential actions and sources of support funding. Some initial work in compiling this summary has commenced. The region would like a rapid overview of this work and summary document to lead into a more detailed next phase regional water security plan. This would include a review and commentary on the current WAP, with a view to this document being submitted to DEW as part of the agency's review of the WAP.



Water Resources cont.

The following scope is required to undertake these two pieces of work:

Part 1 - Strategic Water Management Review

- Review all historical water allocation plans;
- Review previous regional strategic water planning reports;
- Provide high level over-arching summary of water security aspects, including:
- Trends in water availability and reliability (all sources)
- Market demand trends
- Opportunities for new sources
- Pricing
- Regional storage opportunities
- Summary report of the above

Part 2 - Review of the Water Allocation Plan (WAP)

- Review the existing WAP in terms of current and emerging industry water
- security and allocation needs;
- Highlight key areas of inefficiency within the current WAP;
- Document suggested policy areas for improvement;
- Briefly discuss key aspects with key regional stakeholders
- Provide a summary report and draft letter to DEW summarizing key policy



STRATEGIC PRIORITY FIVE: OFFERINGS

AIM - Successfully assist the development of in-valley tourism offerings that make it more compelling for domestic and international traveller to stay and spend.

HOW - Engage in discussion with Luxury Lodges to explore process for developing a premium accommodation option and one to one commissionable product development sessions with operators

MEASURE - Clare valley is thought as a "must visit" destination. Increased visitation numbers and length of stay from 1 to 2 nights. Number of businesses listed on ATDW and offering commissionable product.



Offerings

The region includes approximately 220 bookable accommodation properties, with the majority being multi bedroom Bed and Breakfasts and or three star properties. Since 2017 an additional 22 rooms have been added and 10 rooms upgraded (SATC Accommodation Survey 2019). There are currently investors looking at additional motel style accommodation and the Clare Valley at 67% has the highest occupancy rate of any South Australia region. However, it has been clearly identified through the Clare Burra Research and market activity with South Australian Tourism Commission that the tourism region, and wine industry need to concentrate on additional product developments which enhance the visitor experience.

Including:

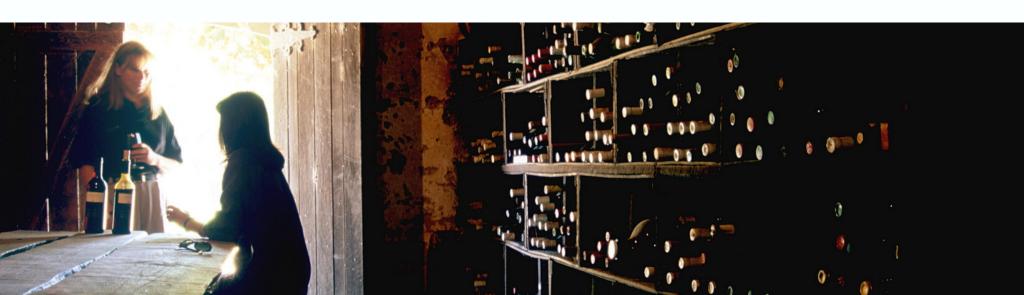
- More pathways to visit through commissionable products for the international market
- High-end accommodation experiences including luxury accommodation and premium dining experiences
- Additional food experience associated with wine regions including chocolate, cheese and other boutique markets
- Better ranges of experiences which allow interactive products at cellar doors and wineries in the region
- Advocate for the inclusion of the Region in Itineraries of Tour Operators who are aligned to the Region's high yield visitor personas
- Identify, initiate strategic marketing + opportunistic partnerships to grow high yield Western and Eastern International Markets in the Region
- Focus on accommodation that fills the gap of higher-end and groups/business events/wellness accommodation (such as medium-sized 5 star)

STRATEGIC PRIORITY SIX: EDUCATION

AIM - All members engaging with, learning from and building their capabilities through interaction with the CVWGA and its members and identify options for a long term.

HOW - Building skills and human resource capabilities in the Clare Valley wine and grape industry - technical, commercial and leadership through courses and workshops.

MEASURE - An increase in innovative industry people and practices employed.



Education

Building skills and human resource capabilities in the Clare Valley wine and grape industry is key to sustainability of the community.

Equally as important is the need to increase the CVWGA members understanding of the value chain of the Clare Valley wine industry and how to optimism the benefit of all.

Planned activities include:

- Development of an education sub committee
- Pruning competitions
- Crop Tours
- Next Crop Program
- Value chain forums by Wine Australia
- Vine Health and biosecurity education
- Mulch trials
- Eutypa projects
- Residue testing
- Career expos to promote the wine industry as a career path
- Regional seminars providing the latest research for winemaking and viticulture



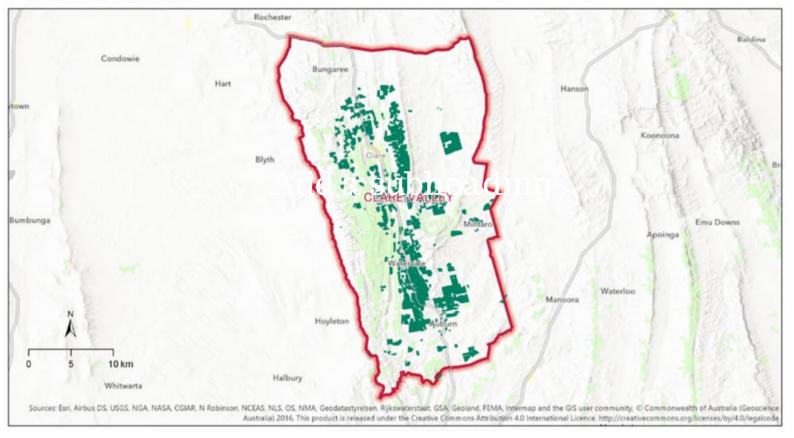


BACKGROUND **INFORMATION ON CLARE VALLEY-**IT'S LOCATION, CLIMATE, VARIETALS, CURRENT **OFFERINGS**

The Boundary

CLARE VALLEY

South Australia



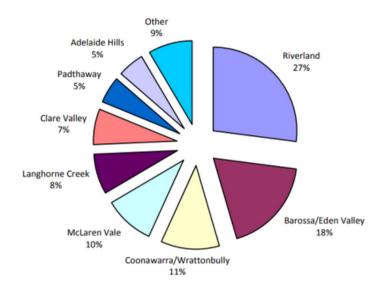


South Australian Vineyards - Regions

South Australian Vineyards - Regions

South Australia has more than 50% of Australia's vineyards (VHA 2017)

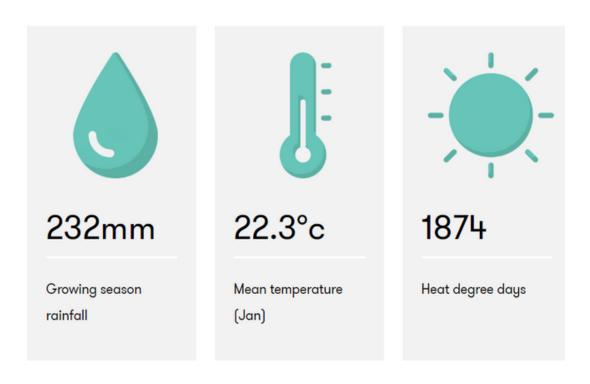
SA vineyard area - regional share





Clare Valley - the climate

The region enjoys a warm, moderate continental climate, with warm to hot summer days moderated by cooling afternoon and night breezes. This diurnal variation, where night temperatures plummet, helps keep the average temperature lower and gives vines respite from the heat of the day, slowing ripening and adding complexity – especially to aromatic vines such as Riesling.





Plantings & Crush 2018

Plantings

Source: ABS National Vineyard Survey 2015	Clare Valley	All regions
Total vineyard area (hectares)	4,289	135,133
Percentage red varieties	72%	64%
Percentage of national vineyards	3%	
Percentage of South Australia vineyards	6%	

Crush

Source: National Vintage Survey 2018	Clare Valley	All regions
Estimated tonnes crushed in 2018	27,242	1,794,182
Average yield (tonnes/ha)	6.4	13.3
Change in crush from 2017	-14%	-10%

Top five varieties in Clare Valley in 2018	Share of tonnes	Av price/tonne
Shiraz	33%	\$1,441
Riesling	28%	\$1,052
Cabernet Sauvignon	17%	\$1,088
Merlot	7%	\$868
Chardonnay	4%	\$707

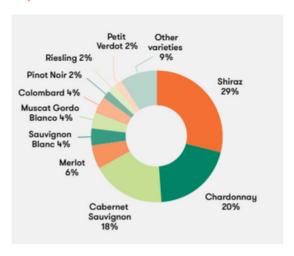


Vintage Report 2019 - crush by region

Crush by region

Region	Tonnes purchased	Winery grown fruit	Share of winery grown	Total crushed
South Australia	535,356	233,507	30%	768,863
Adelaide Hills	12,718	3,284	21%	16,002
Adelaide Plains	2,964		0%	2,964
Barossa Valley	25,487	14,681	37%	40,169
Barossa zone other	87	731	89%	818
Clare Valley	7,765	7,809	50%	15,573
Coonawarra	10,649	26,593	71%	37,242
Currency Creek	1,256	1,883	60%	3,139
Eden Valley	2,672	2,804	51%	5,477
Fleurieu zone other	2,221	322	13%	2,543
Kangaroo Island	21	43	67%	64
Langhorne Creek	26,216	16,920	39%	43,137
Limestone Coast zone other	4,530	10,917	71%	15,447
Lower Murray zone other	8,224	316	4%	8,540
McLaren Vale	21,260	11,778	36%	33,038
Mount Benson	1,577	1,312	45%	2,889
Mount Gambier	889		0%	889
Mount Lofty Ranges zone other	984	33	3%	1,017
Padthaway	22,823	14,392	39%	37,215
Riverland	371,189	102,901	22%	474,090
Robe	498	1,439	74%	1,937
Southern Fleurieu	798	47	6%	845
Southern Flinders Ranges	585	517	47%	1,102
The Peninsulas	155		0%	155
Wrattonbully	9,790	14,783	60%	24,573

Top 10 varieties in South Australia





% change in crush 2018 vs 2019

It's evident that 2019 has not been a great year – winemakers in the Clare Valley report that it's been a tough vintage: early and condensed with seriously reduced yields mainly due to heat and water stress.

In Clare, water for irrigation was inadequate to keep some growers' vines healthy.





The Red Wine Story

Thinking beyond Riesling - to position Clare Valley as a progressive region with climate and terroir capable of growing multiple varieties.

Clare Valley									01	140	01 /		SA
Variety	Total tonnes purchased¹	<\$300	Prio \$300 to <\$600	\$600 to \$1500	\$1500 to <\$2000	\$2000+	Total value purchased grapes	Average purch. value per tonne ²	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed³	Estimated total value ALL grape
Red													
Barbera										6	100%	6	\$8,90
Cabernet Franc										28	100%	28	\$40,33
Cabernet Sauvignon	996			481	430	84	\$1,504,377	\$1,510	39%	1,400	58%	2,396	\$3,618,36
Grenache	40			22	13	4	\$59,999	\$1,505	12%	107	73%	147	\$221,25
Malbec	121		3	42	76		\$176,840	\$1,465	14%	126	51%	247	\$361,49
Mataro/Mourvèdre	97			51	43	4	\$154,812	\$1,596	20%	26	21%	123	\$197,07
Merlot	408			408			\$407,583	\$999	15%	596	59%	1,004	\$1,003,09
Montepulciano	5					5				3	39%	8	\$17,99
Muscat Rouge à Petits Grains										1	100%	1	\$1,20
Petit Verdot	23				23					8	26%	31	\$46,56
Pinot Noir										30	100%	30	\$51,52
Ruby Cabernet										4	100%	4	\$2,22
Sangiovese	46			46			\$48,545	\$1,050	1%	45	49%	91	\$95,63
Shiraz	2,149			817	621	711	\$3,936,750	\$1,832	27%	2,254	51%	4,404	\$8,065,95
Tempranillo	75			66	9		\$88,341	\$1,181	2%	75	50%	149	\$176,37
Shiraz	1				1					33	96%	34	\$55,96
Red total	3,962		3	1,934	1,217	809	\$6,424,970	\$1,622	28%	4,743	54%	8,704	\$13,963,95
White													
Chardonnay	230			230			\$211,031	\$918	30%	244	52%	474	\$435,33
Fiano	3			3						23	90%	25	\$20,39
Gewürztraminer	29			29						26	47%	55	\$38,62
Muscadelle (Tokay)										3	100%	3	\$3,27
Pinot Gris/Grigio	116			116			\$140,299	\$1,209	-2%	256	69%	372	\$449,57
Riesling	3,268			3,109	139	19	\$3,762,059	\$1,151	9%	2,322	42%	5,589	\$6,435,18
Sauvignon Blanc										32	100%	32	\$33,40
Semillon	157		56	101			\$100,290	\$640	5%	36	19%	193	\$123,40
Verdelho										5	100%	5	\$4,84
Viognier	1				1					50	98%	50	\$75,53
Other white										70	100%	70	\$103,46
White total	3,803		56	3,588	140	19	\$4,237,518	\$1,114	13%	3,066	45%	6,869	\$7,723,02
Grand total	7,765		58	5,522	1,356	828	\$10,662,488	\$1,373	19%	7,809	50%	15,573	\$21,686,98

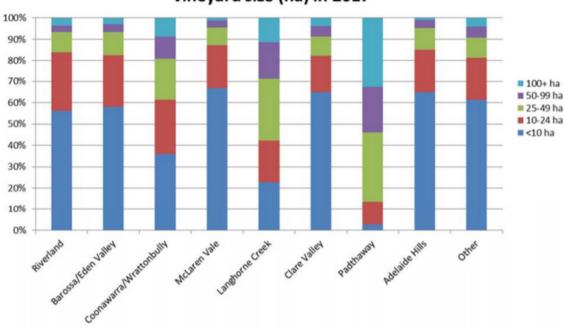


Clare Valley - average vineyard size

South Australian Vineyards - Growers

- * There are 3,403 vineyards in South Australia registered with Vinehealth Australia
- * The average vineyard size is 22.4 ha

Relative proportions of numbers of growers in the regions by vineyard size (ha) in 2017





Clare Valley - Exports

Exports

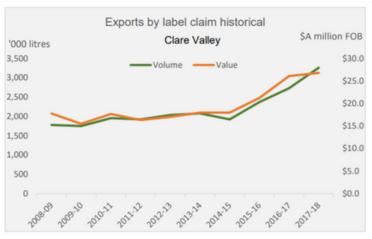
Source: Wine Australia Wine Export Approval System YE June 2018

Exports by GI region content	Clare Valley	All regions
Export volume by GI content ('000 litres)	4,341	851,719
Percentage of crush exported (estimate)	23%	68%

	Clare Valley and Clare	
Label claim exports (bottled only)		Change in 2018
Export volume by GI label claim ('000 litres)	3,259	1 20%
Export value by GI label claim (\$A '000)	26,781	→ 3%
Average value per litre	\$8.22	↓ -14%

Top five export destinations and share of exports (by volume)	Clare Valley and Clare Valley blends	
China, Pr	33%	32%
United Kingdom	22%	13%
New Zealand	14%	4%
Canada	7%	7%
Germany, Federal Republic	7%	2%
Others	17%	43%

Exports by price point	Clare Valley and Clare Valley blends	All bottled wine exports
\$2.49 and under	1%	8%
\$2.50 to \$4.99	15%	62%
\$5.00 to \$7.49	46%	16%
\$7.50 to \$9.99	15%	5%
\$10.00 to \$14.99	17%	5%
\$15.00 to \$19.99	3%	1%
\$20 and over	3%	4%

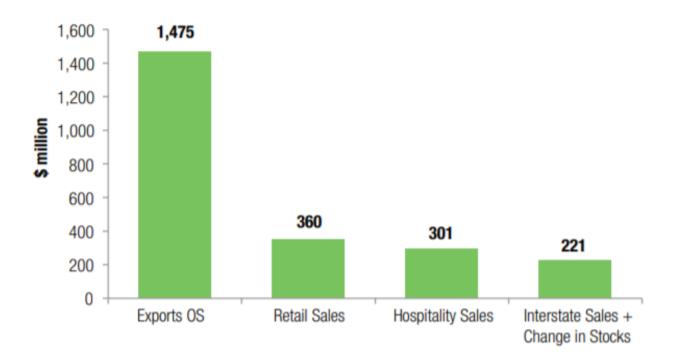






Wine Revenue Channels

In 2016–17, Gross Wine Revenue (GWR) reached \$2.35bn with an increase in value of \$240m on the previous year. Wine exports continues to be the largest contributor of revenue.

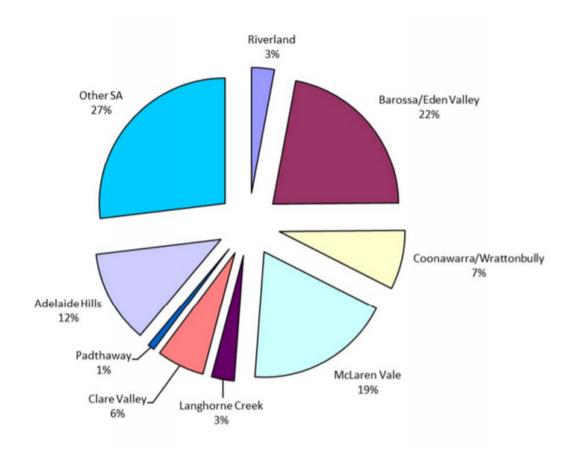




Clare Valley - # Cellar Doors

A growth opportunity for Clare Valley.....

South Australia has more than 340 wineries with a cellar door for visitors to sample wines and enjoy tourism experiences.





Clare Valley - premium wines

Langton's Classification exceptional producers from Clare Valley -

Exceptional – "the most highly prized of all Australian fine wines. Representing generations of effort and character of place".



Wendouree Shiraz

Clare Valley

GROSSET

Grosset Polish Hill Riesling

Clare Valley

JIM BARRY

Jim Barry The Armagh Shiraz

Clare Valley



Delivering the plan

Mindful of the limited resources of Clare Valley Wine & Grape Association and the need to deliver the results from the plan, the Board recommend that the plan initially focus on three areas that require the most immediate attention – Brand, Mix and Water.

This does not mean the other issues will not be progressed, they are being and will continue to be addressed.

