South Australian wine industry – August 2018 snapshot
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The aim of this Snapshot is to provide wine businesses with the insights required to inform decision making and to monitor performance.

We explore water access as an issue, and vineyard redevelopment as an opportunity.

Welcome to the second benchmark study - the South Australian Wine Industry Snapshot - a collaboration of full service advisory firm Bentleys SA and the South Australian Wine Industry Association.

The 2018 study aims to equip wine businesses with the insights and information required to benchmark business performance and to inform business decision making.

Our aspiration is that this initiative will contribute to the continued dominance and long term sustainability of the wine industry in South Australia.

The wine industry is complex. It can sometimes be difficult to find the time to devote to improving business profitability, never mind the relevant information required to compare performance. We trust this report will fill this need by providing valuable insights into business performance and sentiment.

We are grateful to the 126 wine businesses of South Australia that participated in this year’s study and have shared their honest assessments. This represents a 55% increase in participation compared to last year. We are delighted to receive this level of support and involvement.

This year, business confidence is improving across South Australia’s wine regions, however profitability remains a significant and widespread concern.

Despite this, many wine businesses have plans to redevelop vineyards over the coming five years, and are projecting net increases to the size of their vineyards. Therefore, it is not surprising that water consumption is expected to increase over the next decade. Water access and security remain significant concerns.

While operating capacity was a little lower during this year’s vintage, inventories of red and white wine are in balance.

About Bentleys SA

Bentleys SA is a full service advisory firm, which offers a range of specialisations to help ambitious businesses get where they want to be.

Our expanding Advisory practice provides enterprises - at every stage of the business lifecycle - with access to the strategic advice and practical support required to build capability and propel growth.

Our expert R&D tax team offers the support, insight and tools required to claim tax offsets. Are you eligible?

To request one hour with an advisor - at no obligation - please contact us.
While productivity and automation are of increasing importance to wine businesses, staff numbers are expected to remain the same for the coming year.

Free trade agreements continue to support access to new markets, and growing sales revenue is recognised as key to business success over the coming two years.

There appears a significant opportunity for education programs to play a part in the ongoing success of the wine industry, particularly in relation to enabling access to available government incentives and to strengthening marketing and business planning capability.

We hope you enjoy reading this report for more detailed findings.

We look forward to designing additional solutions and resources in response to these findings.

We invite your ongoing involvement, suggestions and enquiry, as we strive to deliver meaningful insights to support the growth of South Australia’s wine businesses.

About the South Australian Wine Industry Association

Established in 1840, the South Australian Wine Industry Association is the peak body representing the viticultural and winemaking interests of the state.

The association’s core functions are to provide leadership and strategy, to represent the industry and lobby on its behalf, and to provide advisory services to members so they achieve great things that they couldn’t by themselves.

Brian Smedley
Chief Executive
South Australian Wine Industry Association

Tim Siebert
Partner, Business Services
Bentleys SA
About the snapshot

This year, 126 wine businesses participated in this study, with many from the larger wine regions, representing smaller, private companies, which make their own wine and grow their own grapes.

This study aims to provide wine businesses with the insights required to inform decision making and to monitor performance.

Responses were collected from May to June 2018 using an online questionnaire. The participation of 126 wine businesses provides a sufficient sample to deliver reliable and valuable insights, which can help inform the growth and development of South Australia’s wine sector.

For some regional analyses, we have excluded responses if they are too few in number in order to protect the identity of participants.

Some comparisons are made with the feedback provided by last year’s 81 participants.

The participants

Location

Participating wine businesses have assets spread widely across South Australia.

There is strong support from wine businesses located in major wine regions, with 71% of respondents having assets in the Barossa Valley, Adelaide Hills or McLaren Vale.

Most regions increased their participation this year. Notably, the Riverland has increased its participation by 82% compared to 2017.

Currency Creek, Kangaroo Island, Southern Fleurieu and Southern Flinders regions are represented in the Snapshot for the first time this year.

Business type

More than half (57%) of participating wine businesses are privately owned and operated.

- Private company: 57%
- Trust, with trustee company: 20%
- Partnership: 11%
- Sole trader: 7%
- Public company: 2%
- Unit trust: 2%
- Unincorporated joint venture: 2%
Facilities

Most participants (81%) grow at least some of their own wine grapes and only 16% purchase all wine grapes processed. Many (61%) operate a cellar door. Seventeen per cent lease a grape processing plant.

Business size

The majority (92%) of participants are businesses with an annual turnover of less than $20 million. Forty per cent are small businesses with revenue less than $1 million per annum.

Source of revenue

Eighty-nine per cent of participants draw income from wine making activities, and almost three quarters (74%) draw income from grape growing.

Business lifecycle

Most participants consider themselves to be in the growth (34%) or mature (39%) phases of their life cycles.
About South Australian wine businesses

While the average purchase price of Australian wine grapes continues to rise, so too does business confidence among wine businesses in South Australia. Export demand has contributed to an increase in prices and profits. Today, South Australia accounts for 51% of Australia’s wine grape crush. We are leading the country not only in production but also through innovation throughout the value chain.

**Business confidence**

Business confidence across all industries in Australia has been trending up over the past four years and we have seen a slight improvement in confidence in this year’s Snapshot, compared to last year. More than three quarters (78%) of respondents are somewhat, very or extremely confident about their business prospects - an improvement in confidence compared to last year. The percentage of businesses worried about future prospects has dropped from 20% to 13% this year.

**Environmental factors**

Of all environmental influences, energy costs continue to have the most negative impact on South Australia’s wine businesses. Labour costs, and water costs and access, are recognised as having a negative impact by two thirds of this year’s respondents. Energy costs and energy security are also major concerns.

Free trade agreements continue to have a very positive impact on South Australian wine businesses, with over 60% of respondents recognising their value.

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**How do you rate your current level of business confidence?**

- Extremely confident: 1%
- Very confident: 29%
- Somewhat confident: 48%
- Not confident or worried: 9%
- Somewhat worried: 12%
- Very worried: 1%
- Extremely worried: 0%

**What impact are the following environmental factors having on your business today?**

- Aussie dollar: Very negative impact
- Changes to payroll tax: Very negative impact
- Changes to ESL: Very negative impact
- Competition - Interstate: Very negative impact
- Free trade agreements: Very positive impact
- Liquor licensing: No impact
- Foreign investment: Very negative impact
- Competition - International: Very negative impact
- Changes to land tax: Very negative impact
- Retailers: No impact
- Labour availability: Very negative impact
- Energy security: Very negative impact
- Labour costs: Very negative impact
- Water costs and access: Very negative impact
- WET rebate changes: Very negative impact
- Energy costs: Very negative impact

- Very negative impact
- Moderately negative impact
- No impact
- Moderately positive impact
- Very positive impact
**Inventory levels are about right**

We asked participants to describe their current inventory levels of white and red wine.

Over one third (38%) of respondents indicated that their inventory levels of white and red wine were about right.

There appears to be more excess inventory of red wine, with 41% of respondents indicating current inventory of red wine as either somewhat, very or extremely high.

White wine appears to be in shorter supply, with 35% of respondents indicating low stock levels.

**Operating capacity at last vintage**

For both 2017 and 2018 vintages, 9% of respondents’ grape processing facilities were not utilised at all. Excluding these, the average operating capacity of grape processing facilities was slightly lower for the 2018 vintage (76%), compared to the 2017 vintage (84%). Given the 2018 tonnage was less than 2017, the slight dip in capacity this year comes as no surprise.

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1. PIRSA, South Australia Wine ScoreCard 2016-17, published 30 January 2018.
3. Sofia Omstedt, IBISWorld Industry REport C1214, Wine Production in Australia, May 2018
Labour focus

The wine production industry is highly capital intensive, however wages still account for a significant share of industry costs.

In last year’s inaugural Wine Snapshot, labour costs (along with energy costs) were recognised as having a significantly negative impact on South Australian wine businesses.

This year, despite many businesses seeking to increase productivity and automation, we have found that current level of investment in human resources is likely to be sustained, or even increased.

Recruitment challenges
We asked survey participants if they have experienced any difficulties with recruiting suitably qualified staff (permanent or casual) and, if so, for which functions.

A significant 45% of respondents indicated they have experienced challenges with recruiting vineyard staff, including viticulturists and vineyard managers. Also difficult to recruit has been cellar door sales staff, with almost one third (32%) of respondents experiencing issues. Recruiting skilled staff in hospitality, finance and trades has also been difficult, particularly in regional areas.

No difficulties for some
Ten per cent of respondents indicated they have had no difficulty recruiting suitably qualified staff for their businesses.

We looked closely at this group of respondents to see if we could identify any shared characteristics. While they were located across many different wine regions, they were all in growth or mature stages of their life cycle, and are generally optimistic about their business prospects.

In which areas of your business have you experienced difficulty recruiting suitably qualified staff?

- Vineyard, including viticulturalists
- Cellar door sales
- Cellar, including winemakers
- Hospitality, chefs, waiting staff
- Finance and administration
- Maintenance and trades
- Sales and marketing
- Laboratory
- Bottling
- Senior management
- Warehouse and supply

No difficulty
Recruiting for the year ahead

We asked participants how their number of FTEs is likely to change in 2018/19, compared to 2017/18.

Most indicated they expect their numbers to stay the same during vintage (80%) and outside of vintage (75%).

A significant number expect FTEs to increase during vintage (16%) and outside of vintage (21%).

Only very few expect their numbers to decline.

While productivity and automation are of increasing importance to wine businesses, staff numbers are expected to remain the same or increase over the coming year.
Pursuing profitability in a changing environment

Australia’s wine industry continues to evolve at a rapid rate. Changing legislation is just one of the factors that can significantly impact a wine business’s profitability. In anticipation, many business models have already made changes given the WET rebate will cease to apply on bulk wine.

In recent times, with greater focus on premiumisation and with strong demand from existing and emerging markets, industry profitability has started to improve. Despite this, sustained profitability remains a significant concern for many wine businesses.

Seeking improved profitability

One third (33%) of this year’s respondents have expressed satisfaction with their organisation’s financial health, indicating it as ‘profitable and sustainable’ or ‘generating a reasonable return’.

Significantly, two thirds (66%) have expressed a need to improve the profitability of their wine business, which is a slight increase compared to last year.

Simple dashboards and financial reports can help businesses focus on the key things that impact profitability.

Blended growth strategies

On average, and in a similar fashion to last year, respondents are implementing at least two growth strategies to further their profitability and sustainability.

Market penetration - the least risky of growth strategies targeting existing customers in existing markets - is the most popular of growth strategies and is implemented by two thirds (66%) of this year’s respondents. Geographic expansion is less preferred as a strategy this year (59%) compared to last (70%), as is product development (42% this year compared to 48% last year). One third (33%) are choosing the more risky option of diversification.

“Our industry is in a period of transition from decline to growth which, if managed well, could provide a stable industry for the first time in many decades.

Generational change is very important. At the moment there isn’t a great deal of incentive for young people to become grape growers.

Unless we take steps as an industry to address this situation, there will be a crisis in the not too distant future.”

- 2018 respondent
A need to understand changing legislation

A large proportion of this year’s respondents acknowledge they need more information on changing or new legislation.

Among the legislation least understood is the Research and Development (R&D) Tax Incentive, a Federal Government program designed to incentivise innovation. Eligible activities can receive sizable tax offsets, which can directly improve an organisation’s cash position.

While there is more awareness of the new liquor licensing laws, only 37% of respondents understand them and have put in place suitable strategies in response.

Overall, the general lack of understanding about changing legislation indicates there could be a roadblock - be it time pressure or even complacency - which is preventing timely and strategic responses from wine businesses. If not informed and prepared, wine businesses will not be able to maximise the opportunities these changes offer.

There are untapped opportunities - and business risks - associated with our changing legislative environment.

We urge wine businesses to become familiar with relevant legislation.

For more details, refer to page 18 or contact us.
South Australian wine industry – August 2018 snapshot

Vineyard redevelopment

As an industry, we continue to learn about ways in which we can optimise the value and output of our vineyards.

In this Snapshot, we have sought to gain a deeper understanding of plans and motivations for vineyard redevelopment in South Australia.

Thirty-eight per cent of this Snapshot’s participants graciously shared details of their intentions for redevelopment.

We note that some of the sample sizes are small, so the results are indicative only.

Motivation for redevelopment

Over one third (35%) of vineyards have been flagged for redevelopment to achieve a more desirable varietal mix, and particularly so in the Riverland.

Another quarter (25%) of vineyards flagged for redevelopment are driven by a need to improve the grade of the fruit, particularly so in the Barossa Valley and Coonawarra regions.

Disease issues are being addressed by 18% of respondents, some citing Eutypa as a current concern.

Increasing yield was cited as a motivation for redevelopment by 11% of respondents.

Size of vineyard for redevelopment

Fifty five vineyards are flagged for redevelopment across South Australia. These 55 vineyards account for a total area of up to 1,950 hectares.

Most (80%) of these redevelopments are planned for smaller vineyards, being 1 to 25 hectares in size. Another 9% are planned for vineyards slightly larger, 26 to 50 hectares in size.

Wine businesses in the Barossa Valley region have flagged the greatest number of vineyard redevelopments.

Area mooted for vineyard redevelopment

<table>
<thead>
<tr>
<th>Region</th>
<th>1 to 25 hectares</th>
<th>26 to 50 hectares</th>
<th>51 to 75 hectares</th>
<th>76 to 100 hectares</th>
<th>More than 150 hectares</th>
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<tr>
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<td>Barossa Valley</td>
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Motivation for vineyard redevelopment

<table>
<thead>
<tr>
<th>Region</th>
<th>Disease issues</th>
<th>Improve grade of fruit</th>
<th>Increase yield</th>
<th>Varietal mix</th>
<th>Other</th>
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Projected change in vineyard area by 2023

Forty one per cent of participants shared their plans for redevelopment for the next five years. Of those, almost one third (31%) indicated they expect no change to the area of their vineyards before 2023.

Thirty vineyards across 11 wine regions have been flagged for expansion, together accounting for a net increase in area of approximately 1,425 hectares.

Eight vineyards across four regions have been flagged to be reduced in size, representing a net decrease of 225 hectares.

Less certainty into the longer term

Few wine businesses are projecting any change to vineyard size between 2023 and 2028. Of the 49 vineyards with projections provided, 63% were expected to have no change.

Only one small vineyard in McLaren Vale has been flagged to be reduced in size by up to 25 hectares from 2023 to 2028.

Seventeen vineyards across nine wine regions have been flagged for expansion by up to 725 hectares net from 2023 to 2028.

Almost 2,000 hectares of vineyards are currently flagged for redevelopment, with the primary motivation to achieve a more desirable varietal mix.
A focus on water

We operate in the driest state in the driest inhabited continent in the world, so it is not surprising that water cost and access are significant concerns for wine businesses. Over sixty per cent of participants in this study (both this year and last) have indicated water cost and access have had a negative impact on their business.

The management of regional water resources is somewhat complex, involving different federal, state and local authorities in each region. The ability of our industry to access high quality water, at a reasonable cost, is recognised as a critical business success factor.

Annual water demand before 2023

Almost half (48%) of this Snapshot’s participants shared their projected water use.

Over two thirds of these (68%) represent smaller vineyards with comparatively low water consumption (less than 2.5 ML/ha) planned through to 2023.

Some vineyards (5%) indicated they rely solely on rainfall or recycled water.

The Riverland, home to large vineyards, projects the most water consumption per vineyard through to 2023.

Projected water demand 2023 to 2028

Longer term water usage projections were provided for 56 vineyards for the years 2023 to 2028, with only one indicating its requirements are likely to reduce.

The majority of responses (80%) indicated that no change in water consumption is anticipated.

An increase in water consumption from 2023 to 2028 is expected for the remaining 18% of vineyards.
Water source

Respondents indicated a strong reliance on bores and groundwater. Over the coming decade, projections indicated that many vineyards (39%), across nine regions, will draw irrigation water from bores and groundwater.

Rivers and creeks are relied upon as the primary source of water by one quarter (26%) of vineyards.

Twenty three per cent of vineyards draw irrigation water from other sources, including recycled water in McLaren Vale and Barossa Infrastructure Limited (BIL) water in the Barossa Valley.

Water consumption is expected to stay the same or increase across most wine regions. Businesses will need a plan to manage their water costs.
Looking to the future

Key success factors
We asked participants to identify the key factors that will underpin their success over the coming two years. Responses were varied, however sales revenue rated as the most important success factor.

New or export markets ranked as the second most important factor, with China’s continued growth noted as important by many.

Key barriers
Continued demand for SA wine was noted as critical and a potential key barrier to success, selected by over half (51%) of the respondents. To help overcome this barrier, we recommend establishing strong connections with markets, gathering feedback and innovating to remain relevant.

Having a shortfall of capital was of concern for 47% of respondents - perhaps not surprising given the extent of redevelopment planned for the next five years.

Lack of water access was recognised as a significant concern also.

Professional development
To help ensure our continued design of meaningful training and professional development programs for wine businesses, we asked participants to nominate subjects of interest.

There is substantial interest to learn about tactical marketing - including marketing channels, digital marketing and social media - as well as strategic marketing and marketing planning.

Business planning was noted as another key topic for professional development, along with business evolution and succession, and efficient production techniques.
While business confidence is generally positive and continues to grow among South Australian wine businesses, there appears no sign of complacency. This year’s participants have expressed a clear desire to improve business performance and practice, with profitability and professional development recognised as important. Free trade agreements continue to support access to new markets, however energy and labour costs are impeding progress. Water access and security remain key issues to be managed. However, these concerns are not deterring the expansion of vineyards over the next five years.

There is apparent concern about maintaining and growing sales revenue. To help address this concern, we appeal to all South Australian wine businesses to tell the story of their wines. Promote your brand, your region. Listen to, engage with and learn from your markets. Innovate. Build and protect our collective brand.

We thank all those who participated in this snapshot and we encourage your continued support of this study, which aims to celebrate and strengthen the wine industry of South Australia.

Delivering improved services

SAWIA and the Wine Grape Council of South Australia (WGCSA) have begun joint discussions on how to best serve and support the South Australian wine industry into the future.

We are considering options for improved services and benefits at state level, while seeking to identify the best possible representation and funding model for a viable and sustainable future with a united value proposition for members.

We thank those who are supportive of these discussions and we invite others to call SAWIA to learn more.

Conclusion

Are you supportive of SAWIA and WGCSA discussions on how to best serve the wine industry?

- Supportive of discussions  66%
- Neutral  16%
- Not supportive  6%
- Need more information  12%
Legislation and incentives

New liquor licensing laws
A number of liquor licensing reforms took effect in South Australia on 18 December 2017. The changes aim to create more efficient processes for industry. Licence-holders can continue to operate under the new laws without needing an updated licence.

For more information, contact SAWIA or go to: www.winesa.asn.au/members/advice-information/liquor-licensing/

New labour hire licensing laws
The South Australian Labour Hire Licensing Act 2017 (the Act) commenced operation on 1 March 2018, requiring providers of “labour hire services” to be licensed, with the requirement to hold a licence effective from 1 September 2018. However, following extensive stakeholder feedback the State Government has decided to postpone the enforcement of the Act until 1 February 2019.

For more information, go to: www.winesa.asn.au/members/advice-information/employee-industrial-relations/

New chain of responsibility obligations
On 1 October 2018, the Heavy Vehicle National Law will be amended to provide that every party in the heavy vehicle transport supply chain has a duty to ensure the safety of their transport activities. In practical terms, this primary duty represents an obligation to eliminate or minimise potential harm or loss (risk) by doing all that is reasonably practicable to ensure safety. SAWIA conducted seminars on the new responsibilities in June and July 2018.

For more information, contact SAWIA or go to: https://www.winesa.asn.au/login/?path=/members/new/member-news/2018/chain-of-responsibility-changes-coming-mid-2018/

Mandatory data breach laws
In February 2018, new laws were activated as part of an amendment to the Privacy Act to require Australian entities, with an annual turnover of more than AU $3 million, to adequately protect any personal information they hold. Should a data breach occur, the entity is responsible for assessing the risk of harm to individuals and taking appropriate action. Serious breaches may incur significant financial penalties.

For more information, go to: www.oaic.gov.au/agencies-and-organisations/guides/

Single touch payroll
Single touch payroll is a reporting requirement for employers which came into effect from 1 July 2018 for employers with 20 or more staff (and will come into effect on 1 July 2019 for employers with fewer staff). Employers will be required to report payments, such as salaries and wages, directly to the ATO.

For more information, contact Bentleys or go to: www.bentleys.com.au/knowledge-centre/stp/

Small business CGT concessions
Small businesses may be eligible for a range of capital gains tax concessions on assets used to conduct business.

For more information, contact Bentleys or go to: www.ato.gov.au/Business/Small-business-entity-concessions/Concessions/CGT-concessions/

R&D Tax Incentive
The Research and Development (R&D) Tax Incentive is a market-driven program, which encourages Australian businesses to invest in innovation. The incentive takes the form of either a potentially sizeable tax refund or a considerable tax reduction.

For more information, contact Bentleys or go to: www.bentleys.com.au/solutions/rd-incentives-innovation/
Support for wine businesses

Bentleys SA is a full service advisory firm. We help enterprises achieve their objectives and get where they want to be. Our expanding range of advisory, accounting and audit services includes strategic business advisory services, R&D tax incentives, wealth management, specialist taxation, corporate recovery, and banking and finance.

We can help you achieve your aspirations. Contact us for a no-obligation consultation.

The South Australian Wine Industry Association, is the peak body for wine businesses in South Australia.

We provide a broad range of services for our members to support the success and performance of their businesses.

Our services cover industrial relations, employee relations and human resources, work health and safety, environment, market development and agribusiness growth. To learn more, please contact:

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+61 8 8372 7900

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With any feedback on this snapshot, or suggestions for future instalments, please contact us.
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SAWIA is a state industry association made up of members who are wine producers and wine grape growers that pay an annual voluntary membership fee to access:
- Representation and leadership
- Advice and information
- Products and services
- Promotion and opportunities.