# Grape and Wine Sector Regulatory Impact Analysis

Consultation paper

September 2024

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We acknowledge the Traditional Custodians of Australia and their continuing connection to land and sea, waters, environment and community. We pay our respects to the Traditional Custodians of the lands we live and work on, their culture, and their Elders past and present.

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## Purpose

The purpose of this consultation paper is to seek information and views on:

* The functioning of the market for wine grapes and wine;
* Whether the existing regulation of the Australian grape and wine sector could be made more effective; and
* Whether additional regulatory or non-regulatory interventions are warranted to improve the functioning of the market for wine grapes and wine.

### How to make a submission

Stakeholders are encouraged to share their views via the Have Your Say platform. Written submissions can be uploaded to the Have Your Say website.

The submission process opens on 18 September 2024.

All submissions received will be published online unless otherwise requested to remain confidential.

The closing date for submissions is 10 October 2024. It is intended that the review will be finalised in April 2025, with an initial draft report in late 2024.

#### Contacts

Email [winepolicy@aff.gov.au](mailto:winepolicy@aff.gov.au) to learn more about the review

## Foreword from Dr Craig Emerson

Heavy imbalances in bargaining power between large businesses and their small suppliers can result in unfair trading practices. This may warrant government intervention in the form of the application of competition laws and codes of conduct.

These circumstances appear to apply in segments of the Australian grape and wine sector. Growers of grapes, especially red grapes, in the irrigated inland wine regions of Australia – the Riverland, Riverina and Murray-Darling regions – argue they have weak bargaining power when negotiating supply agreements with wine producers in these regions.

At the same time, producers of wine argue that they have little or no bargaining power in supplying highly competitive export markets and oligopolistic domestic markets dominated by liquor retailers owned by the major supermarkets, Coles, Woolworths and ALDI.

The design of regulatory interventions aimed at improving the bargaining power of red wine grape growers in irrigated inland regions needs to take account of the weak bargaining power of winemakers when selling their wine products. Driving those producers out of the market through heavy-handed regulatory interventions is not in their interests or in the interests of their grape suppliers.

However, regulatory interventions that oblige producers of wine to engage in sound commercial practices in respect of their grape suppliers can lift the bar and prevent a race to the bottom that ultimately is damaging to the wine producers and their suppliers.

Similarly, oligopolistic wine retailers should comply with competition and consumer laws that are designed to prohibit anti-competitive behaviour and unfair dealings with suppliers. This oligopolistic behaviour not only affects producers of commercial wine (less than $10 per bottle) in inland Australia, it also affects producers of mid-range and premium wine around the continent.

As was the case in my review of the Food and Grocery Code of Conduct and last year’s review of the payment times of large businesses in relation to their small business suppliers, the fear of retribution by small businesses appears to act as a heavy constraint on the gathering of information and evidence by regulatory authorities such as the ACCC. This review will consider the sorts of remedies to this problem recommended in my review of the Food and Grocery Code of Conduct.

While the review will devote a great deal of attention to the inland wine regions, it will also examine whether anti-competitive behaviour is evident in other parts of the Australian wine industry.

This consultation paper asks a number of specific questions of stakeholders. However, this is not an exhaustive list. Stakeholders should feel free to raise other issues in their submissions.

Where stakeholders wish parts or all of their submissions to remain confidential, this will be done. The process of making submissions is set out at this beginning of this consultation paper. In addition to this process, the review will arrange meetings with stakeholders to the extent that it is practicable.

## Review of grape and wine sector regulation

On 23 August 2024, the Hon Julie Collins MP, Minister for Agriculture, Fisheries and Forestry, announced that Dr Craig Emerson has been appointed to lead an independent impact analysis of regulatory options for the Australian grape and wine sector concerning fair trading, competitive relationships, contracting practices and risk allocation.

Dr Emerson’s report will examine whether there is market failure in the grape and wine sector and provide advice about regulatory or other interventions. Draft recommendations will be provided to the Australian Government by the end of 2024.

### Terms of reference

The report will:

* Include a rigorous evidence base of whether there is market failure in the grape and wine sector that should be addressed with regulatory or other interventions.
* Establish through analysis, with a view on improvement in the sector, the costs, benefits and impacts of potential regulatory options, including:
  + Application of existing economy-wide protections under the *Competition and Consumer Act 2010 (Cth)*;
  + Non-regulatory options, such as improvements to the Voluntary Code of Conduct for Australian Winegrape Purchases;
  + A mandatory Code of Conduct for the Australian wine and grape sector;
  + Other legislative options such as amendments to the *Wine Grapes Industry Act 1991 (SA)*, and introduction of similar legislation in other states; and
* Include considerations and recommendations of the above options, based on the analysis.

In preparing the impact analysis, the report must examine and draw upon previous studies into the grape and wine sector, including by the Australian Competition and Consumer Commission (ACCC), the Senate Rural and Regional Affairs and Transport References Committee, Wine Australia, the Viticulture and Wine Sector Working Group and relevant university reports.

The impact analysis must incorporate and critically evaluate evidence and perspectives from key stakeholders, including grape growers and winemakers, industry associations, major retailers, the ACCC and state and territory governments.

The impact analysis should be undertaken by an independent expert in competition policy, law and/or economics.

## Features of the Australian grape and wine sector

The Australian grape and wine sector comprises more than 2,000 wineries and 6,000 grape growers across 65 wine grape growing regions (Wine Australia 2024c). Wine grapes are grown across the continent – from Margaret River in Western Australia to Hastings River in New South Wales, and south to north from Tasmania to South Burnett in Queensland.

Australia has more than 200 years of viticulture history and grows more than 100 different varieties. There are 146,244 hectares of land under vine (Wine Australia 2020) that produce around 1.73 million tonnes of wine grapes annually (Wine Australia 2024b). From this, on average 1.25 billion litres of wine is produced each year, making Australia the fifth largest wine producer in the world by volume and sixth largest by value (Wine Australia 2024c).

Around 59 percent of Australian wine production is exported. This is a valuable industry, exporting $1.9 billion worth of wine in 2023 and $2.9 billion in 2020 prior to the imposition of China’s import duties (Wine Australia 2024a).

## Are there market failures in the Australian grape and wine sector?

Despite the Australian grape growing and wine producing industry’s wide geographic coverage, most commentary and analysis have been focused on the irrigated inland wine regions of Australia – the Riverland, Riverina and Murray-Darling regions.

### Bargaining power of red wine grape growers in irrigated inland regions

It is in these regions where imbalances in bargaining power for grape growers are most pronounced. Agriculture Ministers established a Viticulture and Wine Sector Working Group in March 2024, identifying the Riverland, Riverina and Murray-Darling regions as where the most acute impacts of the oversupply of red wine are being felt. The Working Group heard that red grape prices in these regions are consistently low, which for many growers were below the cost of production. Growers in the Riverland region for the third year in a row have been offered prices for their grapes as low as $120 per tonne, which are well below the indicative cost of production of $300 per tonne leading to grower issues with mental health challenges, financial distress and high debt levels.

The Viticulture and Wine Sector Working Group commissioned Professor Kym Anderson to prepare a report, Australia’s Wine Industry Crisis and Ways Forward: An Independent Review (the Anderson report). The Anderson report (2024, p. 1) indicates that the average price of red wine grapes in the inland regions for those who were able to find a buyer fell in each of the three vintages to 2024 and is forecast to be even lower in 2024.

The Anderson report (2024, p. 9) suggests that, in the foreseeable future, the largest surpluses will remain in red wines that sell wholesale for less than $5 per litre. It further notes that numerous other countries are also facing an oversupply of red wine and that Australia’s share of global wine production has fallen, with the value of its wine exports per capita having more than halved since 2007 (Anderson 2024, pp. 14-15).

Adjustment to low red grape prices was delayed by the emergence in the 2010s of China as a new large export market. However, Australia’s exports to China ceased in late-2020 when China imposed import duties of up to 218 per cent on Australian bottled wine. Those duties have since been removed but the volume and overall value of exports are unlikely to bounce back to their earlier levels. In an era of declining global demand for red wine, Australia will continue to face stiff competition on export markets from Argentina, California, Chile, France, Italy, South Africa and Spain.

Consultation Question:

1. Beyond the Riverland, Riverina and Murray-Darling regions, are there other wine regions in Australia that clearly display the features of market failure in the form of weak bargaining power with wine producers that warrant regulatory intervention?

### How do the actions of winemakers affect wine grape growers?

The main grievances of wine grape growers in the irrigated inland wine regions are:

* The quality assessment processes of winemakers;
* Low prices and a lack of price transparency;
* Unilateral variation of supply agreements by wine producers;
* Long payment times; and
* Termination clauses.

#### Quality assessment processes

Quality assessment processes relating to sugar content and colour of grapes can be arbitrary, as can personal tasting by winemakers. Growers argue that winemakers can use their superior bargaining power to make assessments that inaccurately produce readings of low quality and correspondingly low prices. Supply agreements that provide a unilateral right of a winemaker to change quality specifications during the season place grape producers at a heavy disadvantage.

Supply agreements allow winemakers to vary the timing of grape deliveries unilaterally. This can result in quality deterioration, also placing growers at a heavy disadvantage. For example, growers in the Riverland reported to the Viticulture and Wine Sector Working Group that their grapes were not being collected by winemakers at the correct stage of ripeness. Instead, grapes with high sugar levels that weighed less were collected, resulting in those growers being paid less for their grapes.

#### Price transparency

The ACCC (2019, p. 70) points out that prices for red wine grapes in irrigated inland regions are strongly correlated with wine export prices, which can vary greatly based on global supply and demand. Wine producers can insert price-setting mechanisms into supply agreements that favour them at the expense of growers, including setting the price close to harvest. This puts growers in a position of not knowing what production decisions to make relating to fertilising and pruning, and receiving prices that are below the cost of production. Growers reported to the Viticulture and Wine Sector Working Group that an indicative price and supply amount before the growing season (June/July) would help them make better business decisions.

While the publication of indicative prices at an early stage in the season might seem like a good idea, it can also facilitate price signalling among wine producers, enabling them to collude against grape growers.

#### Unilateral variation of supply agreements

Supply agreements should be in writing rather than being made verbally, but provisions that allow for unilateral variations in those agreements put grape growers at a strong bargaining disadvantage. Grapes left on the vine past their prime deteriorate quickly, greatly constraining a grower’s ability to find an alternative buyer and a better price. For example, the Viticulture and Wine Sector Working Group heard that winemakers had requested growers to plant new grape varieties and then stopped purchasing these varieties long before growers could recoup the initial investment in these vines.

#### Long payment times

Wine producers typically will have greater ability to manage cash flows than grape growers but can use their superior bargaining power to insist on extended payment times. Wine producers in South Australia, where special payment times legislation applies, are constrained from delaying payment to grape suppliers, but growers argue that even these legislated payment times are inordinately long.

#### Termination clauses

Clauses that allow wine producers to terminate agreements with grape growers unilaterally have the benefit to wine producers of pushing the risk of unexpectedly low demand onto growers, who are much less able to bear this risk.

Consultation questions:

1. What improvements could be made to the quality assessment processes?
2. What approaches should be adopted to deal with a lack of price transparency?
3. Should the unilateral variation of supply agreements be prohibited?
4. What are reasonable payment times for grape growers?
5. Should unilateral termination clauses be prohibited or permitted only in prescribed circumstances?
6. What other issues are being faced by grape growers when dealing with winemakers?

### Bargaining power of wine producers

At the other end of the domestic supply chain, market concentration is prevalent in wine retailing. The Anderson report (2024, pp. 24-25) notes the heavy concentration of retail sales in the two largest supermarket chains, which account for 80 per cent of off-trade sales value and that Endeavour Group’s Dan Murphy’s and BWS stores have 63 per cent alone.

These retailers display the features of an oligopoly. They clearly have superior bargaining power to that of wine producers.

Consultation questions:

1. Does market concentration in the domestic retailing of wine warrant regulatory intervention?

#### How does retail market concentration affect winemakers?

The main issues for winemakers when dealing with major retailers are:

* Competing with retailers’ private label wines;
* Vertical integration of wine retailers; and
* Lack of market transparency.

##### Private label (own-brand) wines

Similarly to grocery products, the major retailers of wine, Endeavour Group (Dan Murphy’s and BWS), Coles (Liquorland, First Choice and Vintage Cellars), and ALDI stock many private label (own-brand) wines. However, unlike grocery products, it is not always apparent to consumers that private label wines are supermarket own-brand products.

Australian Grape and Wine (2024, p. 3) claims that private label wines could account for as much as 35 per cent of the domestic wine market by volume, and that Endeavour Group has 240 private label wines and Coles 100. Winemakers claim they are competing for shelf space with these private label wines, particularly at price points that have high sales volumes. Winemakers also claim their products can be delisted at short notice, then replaced with private label wines.

##### Vertical integration of wine retailers

The high concentration of the wine retail market limits the options available to winemakers for selling their products domestically. Moreover, the vertical integration of these retail entities results in winemakers often finding themselves competing against the same businesses they depend on to stock their wines.

As pointed out by Australian Grape and Wine (2024), wine retailers are becoming vertically integrated into the wine supply chain, including ownership of vineyards, wine production, storage and bottling facilities. Retailers can grow their own grapes, make wine themselves, purchase wine in bulk and bottle their own brands, or they can carry private label products exclusively in their own stores. Further, by growing their own grapes and making their own wine, they do not incur the same intermediary costs as other winemakers, such as wholesalers and distributors.

##### Market transparency

Wine producers argue that they are at a disadvantage compared with major retailers, which possess extensive consumer data, such as search and in-store sales data. This information offers market insights and trends that assist major retailers in creating their own products to sell, and enables them to act quickly to market signals (Australian Grape and Wine 2024, p. 4).

Consultation questions:

1. How does the oligopolistic nature of wine retailing in Australia affect independent wine producers?
2. What are the options for intervention in the domestic market for wine retailing?
3. What are the prospective costs and benefits of such interventions?

## Overview of wine industry regulation

### A voluntary code of conduct

The Code of Conduct for Australian Winegrape Purchases (Australian Grape and Wine 2021) is a non-prescribed voluntary industry code developed by a committee with equal representation of winemakers and grape growers. Winemakers who elect to become signatories are governed by the Code in their commercial dealings with growers.

The purpose of the Code is to:

* Provide a framework to support fair and equitable dealings between buyers and sellers of grapes;
* Provide an effective, practical and equitable dispute resolution process for raising complaints and resolving disputes arising between winemakers and growers; and
* Improve grower-winemaker relations.

A winemaker who has become a signatory to the Code can leave it by giving written notice.

There are no penalties for breaches of the Code and no formal mechanisms to conduct audits or seek information from winemakers. Signatories who have breached the Code can be removed from it, but that is the only consequence of a breach.

In the ACCC’s 2021 (pp. 3-4) follow-up review of its 2019 wine grape market study, it concluded that long payment times and a lack of price transparency remained its key concerns. However, at that time it did not recommend a mandatory code of conduct.

#### Coverage of the voluntary code

As mentioned above, winemakers can become signatories to the Code. Grape growers are not signatories. The Code does not cover the winemaker to retailer relationship. At present there are 84 signatories (Appendix A).

In the ACCC’s 2021 follow-up review to its 2019 market study it noted that Code membership had been lifted from 43 to 67 signatories, including a substantial increase in signatories from the Riverina area from a negligible number to signatories accounting for around half the region’s wine grape purchases (p. 21). However, the ACCC (2021, p. 21) maintained its view that the coverage of the Code was inadequate and since it was a voluntary, industry-designed measure, it cannot be enforced by the ACCC or any other body.

While the ACCC (2021, p. 23) did not recommend a mandatory code in its 2021 follow-up review, noting that some progress had been made in response to its 2019 market study, it warned that winemakers were “fast approaching their last chance” to improve price transparency and to shorten payment times and unless significant progress was made the ACCC would take further action, including considering its enforcement options or recommending a mandatory code or additional legislation.

Consultation questions:

1. What other objectives, if any, should guide the Code to improve relations between wine producers and their suppliers?
2. Is the membership of the Code adequate to achieve its objectives?
3. Does the Code effectively address issues between winemakers and their suppliers in the irrigated inland wine regions of Australia and elsewhere in the wine grape industry stemming from bargaining power imbalances?
4. Have dispute resolution provisions in the voluntary code been effective in practice?
5. Should the Code be retained as a voluntary industry code, or made a prescribed voluntary code, or a mandatory code?
6. Should the Code be extended to cover the relationship between winemakers and retailers?

#### Other wine-specific regulations

##### South Australian Wine Grapes Industry Act 1991

The Wine Grapes Industry Act 1991 *(SA)* deals with the payment of all wine grapes sold in South Australia. This legislation is not mirrored in the other states. The Act states that grape payments must be made in three equal instalments. The first one-third instalment must be paid before the end of the month following the month of delivery, the second one-third instalment must be paid before 30 June in that year and the third one-third instalment must be paid before 30 September in that year.

##### Payment Times Reporting Scheme

An independent Statutory Review of the Payment Times Reporting Act 2020 (Cth) conducted by Dr Emerson in 2023 made recommendations to overhaul the Payment Times Reporting Scheme and Act. These recommendations have now been implemented and came into effect on 7 September 2024. Amongst other key changes, the revised Scheme expanded the functions of the Payment Times Reporting Regulator to elevate small business payment times as an environmental, social and governance matter and puts pressure on large businesses to improve payment practices. Large businesses that have long payment times of invoices issued by small-business suppliers will be named and shamed, and those with short payment times named and praised.

##### Relevant provisions in the Competition and Consumer Act 2010 (Cth)

The Competition and Consumer Act 2010 (Cth) has several provisions relevant to the Australian wine industry, including:

* Unfair contract terms; and
* Prohibitions on misleading, deceptive and unconscionable conduct.

However, the ACCC (2019, p. 3) points out in its 2019 wine grape market study that while these laws can address isolated behaviours and conduct, taking enforcement action under them is often not the most effective way to address systemic behaviours.

Legislation commenced in November 2023 prohibiting businesses from proposing, using or relying on unfair contract terms in standard form contracts with consumers and small businesses. Courts can now impose substantial penalties on businesses and individuals who include unfair terms in their standard form contracts. A contract is unfair if it:

* Causes a significant imbalance in the parties’ rights and obligations;
* Is not reasonably necessary to protect the legitimate interests of the party who would be advantaged by such a term; and
* Would cause detriment to a party if the term were to be applied or relied on.

Under the Competition and Consumer Act 2010 (Cth), businesses can apply to the ACCC for authorisation to engage in collective bargaining with other businesses to address imbalances in bargaining power and save time and money on negotiations. The ACCC’s collective bargaining ‘class exemption’ also allows eligible businesses (including businesses with an annual turnover of less than $10 million) to collectively bargain without breaching competition laws. However, it appears that collective bargaining is rarely used by wine grape growers in their negotiations with large wine producers.

##### Unfair trading practices

The Australian Government has been consulting on policy options to protect consumers and small businesses from unfair trading practices (The Treasury 2023). One example of a potential unfair trading practice identified in the Protecting consumers from unfair trading practices Consultation Regulation Impact Statement (The Treasury 2023) was exploiting bargaining power imbalances in supply-chain arrangements, including by unilaterally varying supply terms at short notice.

Consultation questions:

1. What legislation, federal or state, could be invoked in addressing market failures in the Australian wine industry?
2. Are the recently amended unfair contract laws relevant to dealings between wine grape producers and winemakers and/or winemakers and large wine retailers? If not, why?
3. Are the proposed policy options relating to unfair trading practices potentially relevant to dealing with bargaining power imbalances in the wine industry?

### Dealing with the fear of retribution

Wine grape growers in a weak bargaining position with wine producers might fear retribution if they raise concerns directly with producers. Similarly, wine producers might fear retribution if they raise concerns with oligopolistic wine retailers.

This issue was prevalent in the Review of the Food and Grocery Code of Conduct, with small suppliers being fearful of retribution if they raised concerns with the major supermarkets. It warranted a separate chapter in the final report (Emerson 2024).

The final report recommended amendments to the Food and Grocery Code of Conduct to ensure retribution was captured in its good-faith provisions and that an anonymous channel be established by the ACCC to receive complaints about retribution.

Consultation questions:

1. What are the non-legislative obstacles to small producers of wine grapes engaging in collective bargaining with large wineries? Are they fearful of retribution?
2. What measures should be contemplated to deal with supplier fears of retribution?

## Make a submission

Dr Craig Emerson wants to hear from stakeholders in the grape and wine sector. This includes growers, producers, retailers, state agencies, industry bodies, agribusinesses and partnering organisations.

Questions raised in this consultation paper are intended as a guide only. You are invited to cover all questions or only some, depending on your interests. You may also provide more general comments and examples or case studies.

To join the conversation, please visit [the Have Your Say webpage](https://haveyoursay.agriculture.gov.au/grape-wine-regulation).

### Have your say

Submissions may be completed using [the online submission form](https://haveyoursay.agriculture.gov.au/grape-wine-regulation/submission) or by uploading your own document. If you are uploading a written submission on behalf of an organisation, it must be on an official letterhead.

Your submission may be as short or as long as you like. Written submissions longer than 3 pages should include a summary of key points.

Submissions close on 10 October 2024.

### Confidentiality

You may provide public or confidential submissions to this consultation process. If you do provide a confidential submission, your de-identified feedback may be included in a published summary report of submissions. Please note that a request may be made under the Freedom of Information Act 1982 for access to a submission, including a submission marked ‘confidential’. Such requests, including determining whether information is exempt from release, will be handled in accordance with provisions of the Act.

### Next steps

This paper and consideration of submissions are one component of the consultation process, which will also include face-to-face meetings, virtual forums, and other activities.

Dr Emerson will provide draft recommendations to the Australian Government by the end of 2024.

## Appendix A: List of signatories to The Code of Conduct for Australian Winegrape Purchases

* Accolade Wines
* All Saints Estate Pty Ltd
* Angove Family Winemakers
* Australia Food and Beverage Group Pty Ltd
* Australian Vintage Ltd
* d’Arenberg Pty Ltd
* Balancing Heart Vineyard
* Balnaves Vineyard Services Pty Ltd t/as Balnaves of Coonawarra
* Berton Vineyards
* Bird in Hand
* Bleasdale Vineyards Pty Ltd
* Brown Brothers Milawa Vineyard Pty Ltd
* Calabria Family Wines Pty Ltd
* Campbells Wines Pty Ltd
* Cape Jaffa Wines
* Casella Wines Pty Ltd t/as Casella Family Brands
* Cheviot Wine Group
* Colbinabbin Estate Vineyard Management Pty Ltd
* Constellation Australia Ltd
* Coonawarra Jack Winery Pty Ltd
* Cumulus Wines Pty Ltd
* Difabio Estate Wines Pty Ltd
* Domaine Chandon Australia Pty Ltd
* Dorrien Winemaking
* Down To Earth
* Eagle Bay Brewing Co
* Eden Road Wine Company t/as Eden Road Wines
* Feathertop Winery
* First Creek Wines
* Fleurieu Vintners Pty Ltd t/as Boar’s Rock
* Four Winds Vineyard
* Fowles Wine
* Fox Gordon Pty Ltd
* Gemtree Vineyards Pty Ltd t/as Gemtree Wines
* Green Door Wines
* Growers Wine Group
* Gundog Estate
* Hallman Pty Ltd t/as Eden Hall Wines
* Hayes Family Wines
* Heartland Wines Pty Ltd
* Henry Holmes Wines Pty Ltd
* Henschke
* Hill River Estate Wines (formerly Ramco Wine Group)
* Idee Fixe
* J & M Innes Pty Ltd
* Jeir Creek Wines
* Kirrihill Wines Pty Ltd
* La Kooki Wines (Margaret River Wine Solutions)
* Lark Hill Wine Co
* Limestone Coast Wines Pty Ltd
* Montalto
* Nashdale Lane Wines
* Oakridge Wines Pty Ltd
* Obelisk Wine Co
* Ottelier
* Paradigm Hill
* Pernod Ricard Winemakers
* Pipers Brook Vineyard
* Rathbone Wine Group Pty Ltd
* Rusden Wines
* Samarkan Pastoral Co Pty Ltd t/as Coombe Farm
* SA Wine Co.
* Seppeltsfield Wines Pty Ltd
* Serafino Wines
* Shaw and Smith Pty Ltd
* Shaw Family Vintners Wines
* Shingleback Wine Pty Ltd
* Sirromet Wines
* Smallwater Estate
* Tahbilk Pty Ltd on behalf of The Tahbilk Group
* TarraWarra Estate Pty Ltd
* Tinja Pastoral / Lowe Family Wine Co
* Tinlins Wines Pty Ltd
* Treasury Wine Estates
* Trentham Estate
* Tyrrell’s Vineyards Pty Ltd
* Vasse Felix
* Veraise
* Vineyard 28
* Voyager Estate (WA) Pty Ltd
* Wicks Estate Wines Pty Ltd
* Wirra Wirra Vineyards
* Yalumba Wine Company
* Zilzie Wines Pty Ltd

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