



# Australian Wine & China:

澳大利亚葡萄酒与中国市场

## Changing market dynamics and future opportunities

不断变化的市场动态与未来机遇





## Welcome - Today's Seminar 欢迎大家 – 今日研讨会日程安排

Open and Current Status 开幕式及当前形势介绍	Tony Battaglene, Chief Executive - Australian Grape and Wine Tony Battaglene - 澳大利亚葡萄与葡萄酒协会 首席执行官	3:30pm 下午 3 : 30
Market Diversification Priorities 市场多元化优先事项	Damien Griffante, Manager Policy and Market Access - Australian Grape and Wine Damien Griffante - 澳大利亚葡萄与葡萄酒协会政策与市场准入经理	3:45pm 下午 3 : 45
Australian Wine Technical Capabilities 澳大利亚葡萄酒技术能力	Dr Eric Wilkes Group Manager – Commercial Services - The Australian Wine Research Institute Eric Wilkes 博士 – 澳大利亚葡萄酒研究所商业服务部集团经理	4:00pm 下午 4 : 00
Australia China Agricultural Cooperation Agreement 澳中农业合作协议	Steve Guy, Technical Advisor - Australian Grape and Wine Steve Guy - 澳大利亚葡萄与葡萄酒协会技术顾问	4:15pm 下午 4 : 15
Wine Australia – General Update 澳大利亚葡萄酒管理局 – 一般更新	Rachel Triggs, General Manager – Corporate Affairs and Regulation – Wine Australia Rachel Triggs – 澳大利亚葡萄酒管理局企业事务与规管总经理	4:30pm 下午 4 : 30
Questions? 答疑环节	Tony Battaglene Moderator 主持人 Tony Battaglene	4:45pm 下午 4 : 45
Close - Networking drinks and canapés 5:00pm – 6:00pm 闭幕式 - 社交酒会下午 5:00 – 下午 6:00		



2020 was  
a tough  
year!

2020 年是满  
布荆棘的一年  
！





## Status of Australian Wine to China

### 澳大利亚葡萄酒出口中国市场的现状

China's Ministry of Commerce made its final determinations on the Countervailing Duties and Anti-Dumping Investigations on 26 March 2021.

中国商务部于 2021 年 3 月 26 日对反倾销和反补贴调查作出最终裁定。

- ▶ Countervailing duties of 6.3–6.4% (varying by company)

反补贴税税率为 6.3–6.4%（视公司而定）

- ▶ Anti-Dumping duties of 116.2 - 218.4% (varying by company)

反倾销税税率为 116.2–218.4%（视公司而定）

The duties are apply for five years from 28 March 2021.

征税有效期为五年，从 2021 年 3 月 28 日开始实施。

This effectively closes the market for most Australian produced bottled wine in container less than 2Litres

这几乎将大部分产于澳大利亚的 2 升装及以下的葡萄酒拒于中国市场之外

## What are the options from here 未来有哪些选择

There are a number of options for appeal of this decision including:

针对这一裁定的若干申诉选择包括：

- ▶ Bilateral consultations 双边磋商
- ▶ Domestic administrative review in China 在中国国内提起行政复议
- ▶ Domestic (judicial) court action in China 在中国国内发起（司法）法庭诉讼
- ▶ Dispute action under ChAFTA 根据《中澳自由贸易协定》发起争议诉讼
- ▶ WTO committee processes 采取世贸组织委员会上诉程序
- ▶ ‘Changed circumstances’ review under Chinese AD/CVD processes (or Interim Reviews) 根据中国反倾销/反补贴流程申请“形势变迁”复审（或中期复审）
- ▶ WTO dispute action 向世贸组织提起争议诉讼

Most are considered unviable in achieving any meaningful outcome to resolve duties. 上述大多数选择无法在解决征税问题上取得任何有意义的成果。



## What are the options from here 未来有哪些选择

Other than options for appealing the decision business are looking at different opportunities to diversify.

除了对这一裁决提起申诉外，企业也在寻找实现多元化的各种机会。

This can mean diversification of production or product eg:

其中包括生产多元化或产品多元化，例如：

- ▶ Bulk wine 桶装葡萄酒
- ▶ Non-alcoholic grape juice 不含酒精的葡萄汁饮料
- ▶ Sparkling wine 起泡葡萄酒
- ▶ Other beverages or wine based products 其他饮料或葡萄酒衍生产品

Diversifying route to market i.e. sending exporting to another country, altering the product and re-exporting to China in order to avoid the tariff

实现入市途径多元化，即先把产品出口到其他国家，改变产品性质后再出口到中国，以此避免关税

Businesses need to be aware of the ongoing sovereign risks associated with these options while relations remain tense.

在两国关系依旧剑拔弩张之际，企业需要注意与这些选择相关的持续主权风险。



## What are the options from here 未来有哪些选择

As these options present a number of risks the key area of priority for the Australian wine sector is **market diversification**. 由于这些选择存在诸多风险，澳大利亚葡萄酒行业应首先将目光重点投放于实现市场多元化。

- ▶ Market diversification is not easy and takes time.

实现市场多元化并不能一蹴而就，而且需要经历时间的考验。

- ▶ Luckily Australian wine exports are already quite well diversified.

幸运的是，澳大利亚葡萄酒的出口目前已经进入了多元化进程。

- ▶ Australian wine is already exported to over 100 markets

澳大利亚葡萄酒目前已经远销 100 多个海外市场

- ▶ Our geographic closeness, strong trade relations and existing footprint mean we are well positioned for diversification into Asia

紧密的地理位置联系、强大的贸易关系和现有的市场足迹意味着我们已具备实现亚洲市场多元化的条件

- ▶ Key will be growing those markets or our market share

关键在于扩大这些市场或我们的市场份额

We will hear more about market diversification priorities from our next presenter. 我们的下一位演讲人将同大家分享更多关于市场多元化优先事项的内容。





## **What are the priorities 我们要关注哪些优先事项**

**Efforts to retain some market recognition.**

努力投入，让我们始终拥有一定的市场知名度。

**Brand protection becomes important. 品牌保护越发重要。**

**Keeping Australian wine in the mind of consumers.**

让澳大利亚红酒始终在消费者心中占有一席之地。

**Building industry and government positive relations.**

行业与政府建立积极关系。

**Maintaining business partnerships and supply chains.**

维护商业伙伴关系和供应链。

**We encourage those of you who remain in the industry to continue to work with Australian Grape and Wine to achieve these priorities.**

我们鼓励那些仍在坚守这个行业并继续与澳大利亚葡萄与葡萄酒协会合作的人士实现这些优先事项。

**We will be back in the market and need to prepare for when that day comes**

有朝一日我们将重回中国市场，但在此之前我们需要做好充足准备，从而胜券在握



# Will China fly high again?

中国市场会重  
现辉煌吗？





**YES!!!!**  
**当然!!!!**



Thank you 谢谢大家



澳大利亚葡萄与葡萄酒

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起源于行业，服务于行业

Supported by the Australian Governments Australia-China Agricultural Cooperation Agreement Program.

由澳大利亚政府《澳中农业合作协议》项目提供支持。

# Market Diversification Priorities 市场多元化优先事项

**Damien Griffante, Australian Grape and Wine**

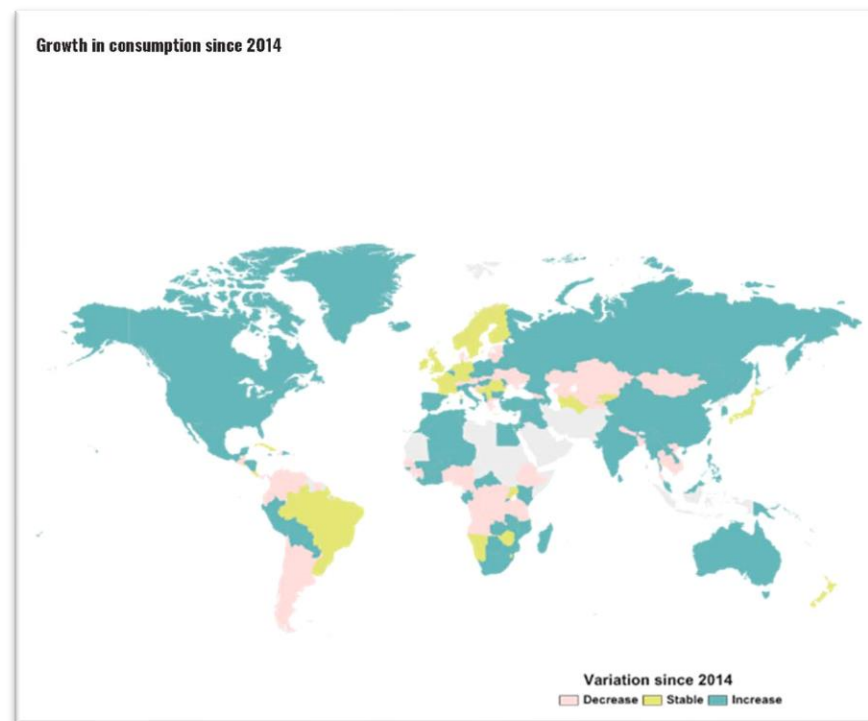
**Damien Griffante, 澳大利亚葡萄与葡萄酒协会**





## Australian Wine Market Diversification Priorities 澳大利亚葡萄酒市场多元化优先事项

1. Market diversification strategy  
市场多元化战略
2. Supports and resourcing  
支持和资源
3. Key market priorities  
关键市场优先事项



Source: OIV - 2019 Statistical Report on World viniculture  
来源: 国际葡萄与葡萄酒组织 (OIV) - 2019 年全球葡萄栽培  
酿酒统计报告



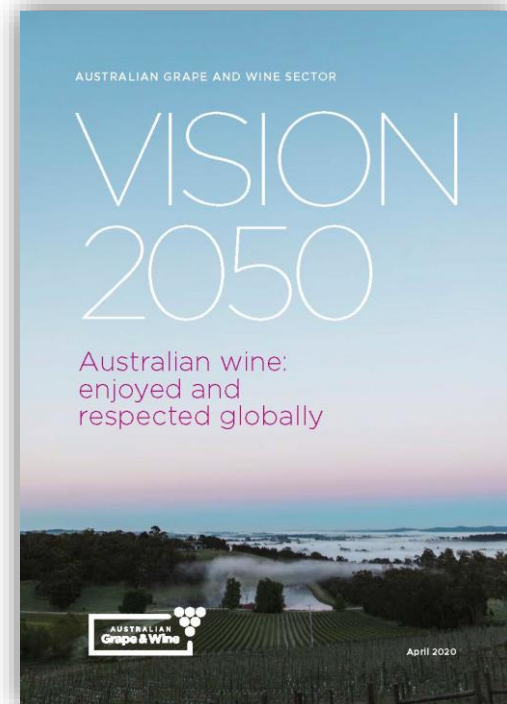
## Market Diversification Strategy 市场多元化战略

The Australian Grape and Wine sectors Vision 2050 target of Australian wine exports valued at \$10 billion by 2050.

澳大利亚葡萄与葡萄酒行业的 2050 年愿景目标是澳大利亚葡萄酒出口额在 2050 年前达到 100 亿澳元。

- ▶ Impacts of 2020 do not change this vision.  
纵然2020 年有所影响，但是这一愿景目标保持不变。
- ▶ Diversifying and expanding exports is hard work and will take time.  
市场多元化和扩大出口是一项艰巨的工作，需要一定的时间。
- ▶ Consider short medium, and long term priorities.  
我们需要考虑短期、中期和长期的优先事项。
- ▶ Spread our effort broadly to markets where we can grow demand or our market share.  
对于我们可以扩大需求或市场份额的市场，我们应广泛地努力耕耘。
- ▶ Structure our approach so we not flooding markets.  
我们需要组织我们的方法，避免我们的产品在市场上泛滥。

Australian Grape and Wine is working on an industry framework for diversification of markets achieving the industry Vision 2050. 澳大利亚葡萄与葡萄酒协会正在制定一项市场多元化行业框架，以实现行业 2050 年愿景目标。





## Supports and Resourcing 支持和资源

Number of Supports and resourcing that have been announced:

已宣布的支持和资源数据:

**Australian Federal Government Agribusiness Expansion Initiative (ABEI) \$72.7 Million**

澳大利亚联邦政府农业综合企业扩张计划- 7270 万澳元

- ▶ **Expansion of Austrade staff and services – \$42.9 Million**

澳大利亚贸易委员会工作人员与服务扩充计划 - 4290 万澳元

- ▶ **Department of Agriculture \$29.8Million**

农业部 - 2980 万澳元

**Industry levy to Wine Australia** 澳大利亚葡萄酒管理局行业征税

**State Government supports.** 州政府支持。

**Australian Grape and Wine to provide an overarching strategy for investment and future priorities.**

澳大利亚葡萄与葡萄酒协会将为投资和未来优先事项提供总体战略。



## Activities 活动

Resourcing is being split across 3 key categories of activity:

资源配置根据以下 3 个主要活动类别进行划分：

1. Business supports 业务支持
2. Marketing and promotion 市场营销与推广
3. Trade and market access 贸易与市场准入

Australian Grape and Wine will utilise its resourcing in this to focus on supporting marketing and promotion and driving trade and market access activities.

澳大利亚葡萄与葡萄酒协会将利用其在该领域的资源，重点支持市场营销与推广，推动贸易和市场准入活动。





## Key market priorities 关键市场优先事项

Differing state, regional and business priorities across markets, however priority markets can be categorised as follows:

不同市场的州、地区和业务优先事项不同，但重点市场可划分为以下几类：

- ▶ **Tier 1 Well established** - United States of America, Canada, United Kingdom.  
1 级成熟市场 – 美国、加拿大、英国。
  
- ▶ **Tier 2 Established** - Singapore, Hong Kong, Japan, New Zealand  
2 级相对成熟市场 – 新加坡、香港、日本、新西兰
  
- ▶ **Tier 3 Emerging** - South Korea, Vietnam, Malaysia, Philippines, Thailand, Indonesia, India, Other Europe.  
3 级新兴市场 – 韩国、越南、马来西亚、菲律宾、泰国、印度尼西亚、印度、其他欧洲国家。



## Tier 1 United States of America, Canada, United Kingdom 1 级 美国、加拿大、英国

### **USA 美国**

- ▶ Investment in marketing and promotion. 市场营销与推广投资。
- ▶ Support for new market entry 新市场准入支持

### **Canada 加拿大**

- ▶ Potential for growth & value sustainability 增长和价值的可持续性潜力
- ▶ complex provincial laws and regulations 复杂的省级法律法规

### **UK 英国**

- ▶ Largest volume market. 销售量最大的市场。
- ▶ Strong trading and political relations with current Free trade agreement under negotiation. 在目前正在谈判的自由贸易协定加持下，继续保持强大的贸易和政治关系。



## Tier 2 - Singapore, Hong Kong, Japan, New Zealand

### 2 级 – 新加坡、香港、日本、新西兰

Tier 2 - Established markets that present potential for either growth or shifting market share.

2 级 – 具有增长潜力或市场份额变动潜力的市场。

Approach to each will vary but all have:

我们对每个市场采取不同方法，但这些市场均存在以下情况：

- ▶ Limited technical barriers to trade  
有限的技术性贸易壁垒
- ▶ Strong trading relations and agreements in place with Australia  
与澳大利亚建立了强有力的贸易关系并签署了相关协定
- ▶ Consumer understanding/demand for Australian wine.  
消费者对澳大利亚葡萄酒有所了解或存在需求。



## Tier 3 Emerging Markets

### 3 级 新兴市场

Tier 3 - Emerging markets where Australian Wine may not have much of an existing footprint and or there is potential opportunity for growth.

3 级 - 澳大利亚葡萄酒的当前存在感较低或者有潜在增长机会的新兴市场。

#### **South Korea and ASEAN markets 韩国和东盟市场**

- ▶ All will have different approaches  
我们将对所有市场都采取不同的方法
- ▶ Opportunities for growth at high value.  
具有高回报增长机会。
- ▶ A number of technical barriers to trade.  
若干技术性贸易壁垒。
- ▶ Geographical closeness present a competitive advantage.  
紧密的地理位置联系形成一种竞争优势。





## Tier 3 – India

### 3 级 – 印度

A long term prospect 长期潜在市场

- ▶ 150% import duty plus state based duty's and taxation. 150% 进口税加上以邦为基础的关税及其他征税。
- ▶ Complex distribution and regulatory environment. 复杂的分销和监管环境。
- ▶ Previous FTA negotiations have stalled. 此前的自由贸易协定谈判停滞不前。

**However** 尽管如此

- ▶ It has by far the greatest opportunity for large growth.
- ▶ 印度是目前为止拥有最大大幅增长机会的市场。
- ▶ Australia is already the largest importer of wine to India.
- ▶ 澳大利亚已经是印度最大的葡萄酒出口国。
- ▶ Political and trading relations with Australia are at an all time high.
- ▶ 与澳大利亚的政治和贸易关系处于有史以来的巅峰状态。
- ▶ Australian Grape and Wine has a long terms strategy for India.
- ▶ 澳大利亚葡萄与葡萄酒协会对印度市场拥有长期战略规划。



## Tier 3 – Other Europe

### 3 级 – 其他欧洲国家

#### **Russia & Poland 俄罗斯和波兰**

- ▶ Technically challenging markets with strong competition  
竞争激烈且具有技术挑战性的市场
- ▶ Significant potential for high value growth.  
具有显著的高回报增长潜力。

#### **Nordic countries (Denmark, Norway, Sweden, Finland and Iceland) 北欧国家（丹麦、挪威、瑞典、芬兰和冰岛）**

- ▶ Australian wine already has a strong foothold in these markets  
澳大利亚葡萄酒已经在这些市场内打下了坚实的基础
- ▶ Potential to grow its market share  
具有市场份额增长潜力
- ▶ Marketing Australian wines sustainably credentials.  
具备可持续地推广澳大利亚葡萄酒的条件。



Thank you! 谢谢大家!



澳大利亚葡萄与葡萄酒

**Damien Griffante**  
政策与市场准入总经理

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起源于行业，服务于行业

Supported by the Australian Government's Australia-China Agricultural Cooperation  
Agreement Program

由澳大利亚政府《澳中农业合作协议》项目提供支持



The Australian Wine  
Research Institute

## Australian Wine Technical Capabilities Authenticity, provenance and safety

Dr Eric Wilkes  
Group Manager Commercial Services





# Australian Wine, quality underpinned by science



The Australian Wine  
Research Institute

***Australia has some of the most advanced wine science capabilities in the world.***

While Australian wine is defined by stylistic and quality drivers, the technical capabilities of the industry and its supporting bodies along with a rigorous regulatory framework ensure every bottle is safe and of the highest quality.





# Wine is an inherently safe product



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Research Institute

When wine is made using normal procedures from grapes it is inherently safe;

- No known human pathogens can grow in the alcohol/acid/phenolic conditions of wine.
- The levels of byproduct fermentation substances such as methanol are below those found in other beverages such as orange juice.
- Grapes and wines do not contain significant levels of heavy metals or other toxic substances.
- Production practices do not add significant levels of any substance that is harmful to human health (including ethanol when consumed in moderation).

In short, when consumed responsibly, wine does not pose any risk to human health and is considerably healthier than many other sugar rich beverages.

The majority of reports of incidents around toxicity of wine occur in markets where ***fake products*** have been labelled as wine.



# Wine authenticity



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Research Institute

Not a new problem!

Global food fraud  
costs ***\$US49 billion***  
annually!\*



\*McGrath, T., et al (2018). Trends in Food Science & Technology 76(Meat Science 121 2016), 38-55.

# Is wine different to other foods?



The Australian Wine  
Research Institute

In some ways it is.

- Massive transformation from raw material to final product
- Year to year variation expected
- Emphasis on differences between small geographically “distinct” regions.
- A batch process



# What is wine fraud?



The Australian Wine  
Research Institute

## Misrepresentation

Is it really a Central  
Otago Pinot?

## Counterfeiting



## Refill





“It is not about making the product impossible to counterfeit, it is about making the barrier to do so high enough so another product is chosen”

- Propriety labelling and bottles
- Serialization of bottles codes
- Easily read with consumer device

QR codes already in use  
Linked to big data and trend analysis



### To be really successful

- Need to be producer/app agnostic
- Unique NFC codes (closure and label)
- Linked to payment system?
- Once used / quarantined



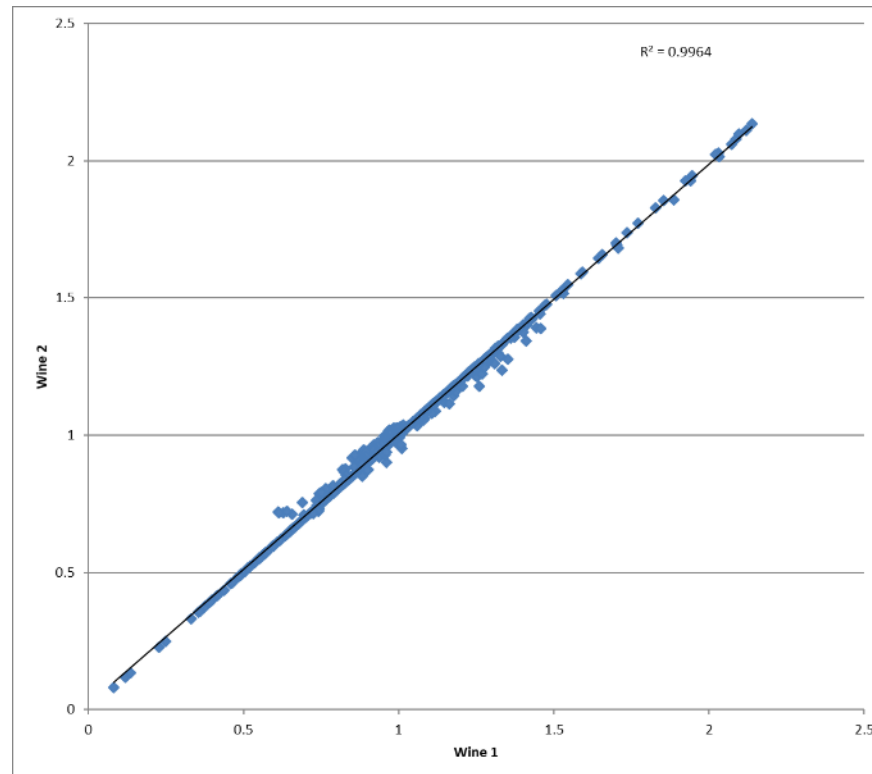
# Counterfeiting and Refill



The Australian Wine Research Institute

## Direct forgeries easy to ID in laboratory

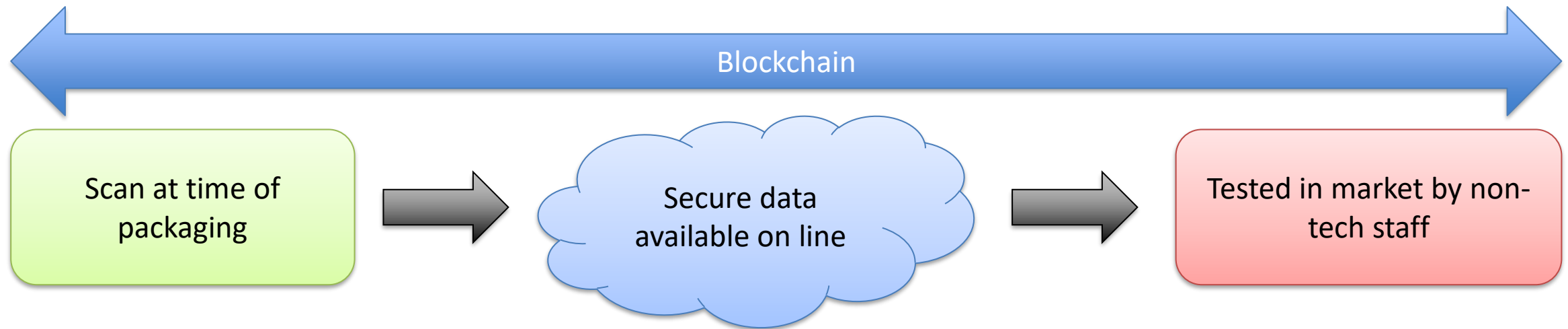
- Comparing analytical parameters such organic acids, trace metals, MIR spectra etc.
- In the lab!



## Moving it to the market



The Australian Wine  
Research Institute



# Can we determine the provenance of an unknown wine?



The Australian Wine  
Research Institute

From The Times

January 22, 2009

## Two are sentenced to death over toxic milk scandal

Chinese court rules that two men are to be executed after at least six babies died and 300,000 fell ill after drinking tainted milk powder

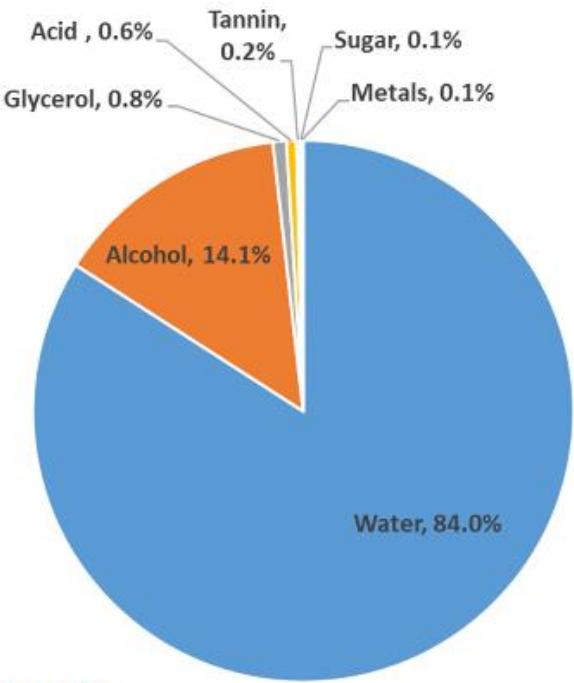






# Scientific solutions

There is a machine that goes “bing” for that!



Components

H

## Elements Found in Wine

																	He
Li	Be											B	C	N	O	F	Ne
Na	Mg											Al	Si	P	S	Cl	Ar
K	Ca	Sc	Ti	V	Cr	Mn	Fe	Co	Ni	Cu	Zn	Ga	Ge	As	Se	Br	Kr
Rb	Sr	Y	Zr	Nb	Mo	Tc	Ru	Rh	Pd	Ag	Cd	In	Sn	Sb	Te	I	Xe
Cs	Ba	La	Hf	Ta	W	Re	Os	Ir	Pt	Au	Hg	Tl	Pb	Bi	Po	At	Rn
Fr	Ra	Ac	Rf	Db	Sg	Nh	Hs	Mt	Ds	Rg	Cn	Nh	Fl	Mc	Lv	Ts	Og

Ce	Pr	Nd	Pm	Sm	Eu	Gd	Tb	Dy	Ho	Er	Tm	Yb	Lu
Th	Pa	U	Np	Pu	Am	Cm	Bk	Cf	Es	Fm	Md	No	Lr

# Provenance going forward



The Australian Wine  
Research Institute

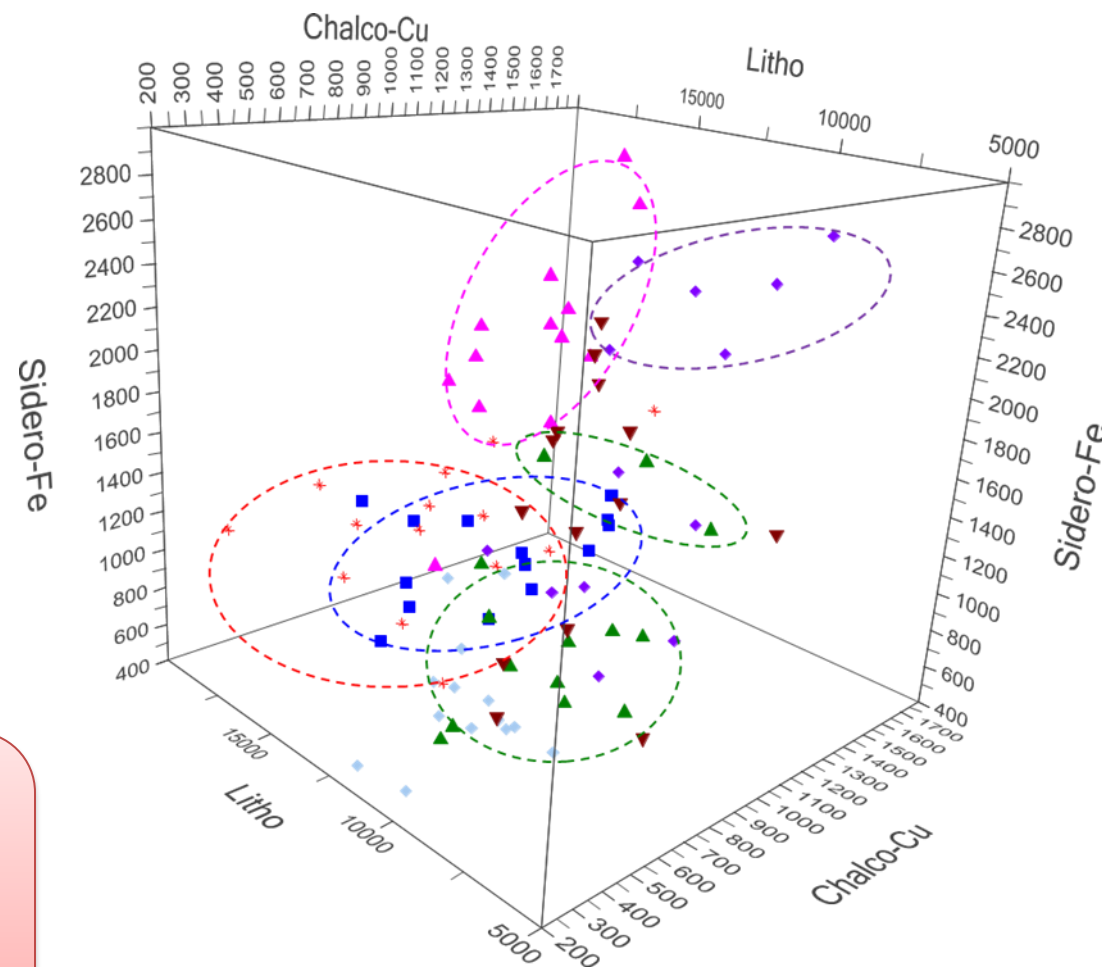
## Multi-parameter approach

Using metal, carbon and oxygen isotope ratios linked to

- Atmosphere
- Water
- Geology

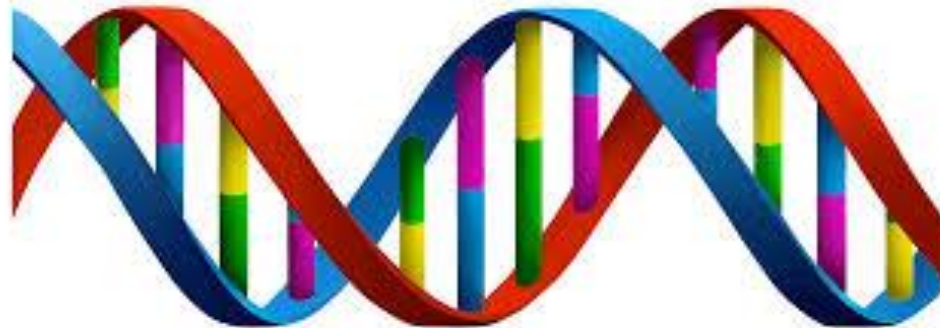
Has the potential to identify not just the continent, but the individual region.

Warning!  
95% confidence  
1 in 20 wrong?



## DNA?

- Definitely a lab and not in market activity
- The winemaking process and maturation destroys many of the obvious markers.
- Some success in using protein profiles and other chemical markers
- Nuclear Resonance Spectroscopy (NMR) has been used in some markets with success.
- Efforts to reliably extract DNA markers from wine continue.



## Complications?

- Wines can be blended from multiple varieties, and not all labelled.
- In much of the world there is not any restriction on which varieties can be grown where.
- Wines sweetened with concentrate from other varieties.



# Thankyou



The Australian Wine  
Research Institute

- Dr Martin Day
- CSIRO Land and Water
- Staff of the AWRI
- The Australian Wine Industry

**Wine  
Australia  
for  
Australian  
Wine**



This work is supported by Australia's grapegrowers and winemakers through their investment body Wine Australia, with matching funds from the Australian Government. The AWRI is a member of the Wine Innovation Cluster in Adelaide.

Australia  
China  
Agricultural  
Cooperation  
Agreement  
澳中农业合  
作协议

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Australian Grape and Wine  
澳大利亚葡萄与葡萄酒协会



Wine is regulated as a food  
葡萄酒是受监管的食物

# AGW's project (2019)

## 澳大利亚葡萄酒 与葡萄酒 协会项目 (2019)

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The aim of the project was to resolve some technical issues facing exporters of Australian wine to China

该项目的目的是解决澳大利亚葡萄酒出口商在向中国输送产品时面临的一些技术问题

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The main problem was that some winemaking materials and practices permitted under Australian law are not permitted in wine sold in China

主要问题是澳大利亚法律允许的一些酿酒添加剂和做法不允许在销往中国的葡萄酒中使用

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This is not due to health or safety reasons but to the existence of different regulatory systems.

这不是出于健康或安全的原因，而是由于不同的监管制度。

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In Australia authorised materials can be found in the Australia New Zealand Food Standards Code. In China they are in National Standard GB 2760 (the latest 2014 edition was implemented 2015)

在澳大利亚，获许使用的添加剂可在《澳大利亚新西兰食品标准法典》中找到。



# Chinese and Australian Systems are different

## 中国和澳大利亚的监管体系存在差异

China  
中国



Australia  
澳大利亚



偏酒石酸

metatartaric acid

CNS 号 01.105

INS 号 353

功能 酸度调节剂

食品分类号	食品名称	最大使用量	备注
04.01.02.04	水果罐头	按生产需要适量使用	

Entry for a typical  
additive  
典型添加剂条目

- Canned Fruit  
水果罐头



L (+)-酒石酸, *dl*-酒石酸      L (+)-tartaric acid, *dl*-tartaric acid

CNS 号   01.111,01.313      INS 号   334,—

功能   酸度调节剂

食品分类号	食品名称	最大使用量/(g/kg)	备注
06.03.02.04	面糊(如用于鱼和禽肉的拖面糊)、裹粉、煎炸粉	10.0	以酒石酸计
06.03.02.05	油炸面制品	10.0	以酒石酸计
12.10.01	固体复合调味料	10.0	以酒石酸计
14.02.03	果蔬汁(浆)类饮料	5.0	以酒石酸计,固体饮料按稀释倍数增加使用量
14.03.02	植物蛋白饮料	5.0	以酒石酸计,固体饮料按稀释倍数增加使用量
14.03.03	复合蛋白饮料	5.0	以酒石酸计,固体饮料按稀释倍数增加使用量
14.04	碳酸饮料	5.0	以酒石酸计,固体饮料按稀释倍数增加使用量
14.05	茶、咖啡、植物(类)饮料	5.0	以酒石酸计,固体饮料按稀释倍数增加使用量
14.07	特殊用途饮料	5.0	以酒石酸计,固体饮料按稀释倍数增加使用量
14.08	风味饮料	5.0	以酒石酸计,固体饮料按稀释倍数增加使用量
15.03.01	葡萄酒      Grape Win葡萄酒	4.0 g/L	以酒石酸计



# Items permitted in Australia but not in China 允许在澳大利亚使用但不允 许在中国使用的添加剂

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- 11 additives  
11 种食品添加剂
- 19 processing aids  
19 种加工助剂

(although 6 of these additives can  
be used as processing aids)  
(尽管其中 6 种食品添加剂可作  
为加工助剂)



# Take Care Reading GB 2760

## 请仔细阅读 GB 2760

Table A.2  
表 A.2

“Permitted food additives”  
“允许使用的食品添加剂”

- Carageenan  
卡拉胶
- Carboxy methyl cellulose  
羧甲基纤维素
- Malic acid  
苹果酸
- Lactic acid  
乳酸
- Ascorbic acid  
抗坏血酸
- Gum arabic  
阿拉伯胶

Table A.3  
表 A.3

“Exceptions”  
“例外情况”

- 15.03.01 Grape wine  
15.03.01 葡萄酒
- <https://www.wineaustralia.com/selling/by-market/export-market-guide-china>





# Allergen labelling 标注过敏原

- Milk, egg and plant proteins are not permitted by GB 2760  
GB 2760
- 不允许添加牛奶、鸡蛋和植物蛋白
- As these products are foods in themselves they are, however, permitted to be used in wine in China  
然而，由于这些产品本身就是食品，它们在中国被允许用于葡萄酒中
- This will be particularly important when allergen labelling is made mandatory in China.  
当中国强制要求张贴过敏原标签时，这一点就变得尤为重要。

# Downy Mildew 霜霉病

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## Control of Downy Mildew 霜霉病的防治

- Phosphorous acid is effective at both preventing and curing downy mildew  
亚磷酸能够有效预防和治疗霜霉病
- It travels through the grapevine and is safe for both the user and the environment  
它通过葡萄藤吸收和传导，对用户和环境都是安全的
- China has a temporary limit for Fosetyl-Al, equivalent to 7.5 mg/kg of Phosphorus acid.  
中国对三乙磷酸铝规定了临时限量标准，对应亚磷酸的等效最大残留限量为 7.5 mg/kg。
- Most markets have higher limit.  
大多数市场规定更高的限量标准。
- We have developed guidance as to how to apply for a change to Chinese law.  
我们制定了如何申请变更相关中国法律的指南。





# Questions answered through this project

## 通过本项目 解答的问题

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The winemaking materials milk, egg and plant proteins are not approved for wine in GB 2760 but can be used since they are foods in themselves.

酿酒添加剂牛奶、鸡蛋和植物蛋白在 GB 2760 中未被批准用于葡萄酒中，但由于它们本身就是食品，其实是可以使用的。

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We have a guidance document that can be used if we want to apply for GB 2760 to be amended to allow for items not currently permitted 如果想要申请修订 GB 2760 以加入目前未被许可的添加剂，我们能够提供指导性文件作为参考

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The use of the vineyard chemical, phosphorus acid, was clarified and we have a roadmap for how to pursue an increase in the limit and to make it permanent

关于葡萄园中化学品亚磷酸的使用情况已经得到明确，我们制定了一个路线图，可用于指导如何申请提高限量标准并使其固定标准

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When determining the category of wine, Chinese authorities measure all the residual sugar in the wine, not only glucose and fructose.

在确定葡萄酒类别时，中国有关部门测量葡萄酒中所有的残留糖分，而不仅仅是葡萄糖和果糖。

Thank You  
谢谢大家

# Wine Australia - overview

## 澳大利亚葡萄酒管理局 - 概述

We are an Australian Government statutory authority governed by the Wine Australia Act 2013.

我们是受《2013 年澳大利亚葡萄酒管理法案》(Wine Australia Act 2013) 管辖的澳大利亚政府下属法定机构。

### Our role under the Act is to:

根据该法案，我们的职责包括：

- coordinate or fund grape and wine research and development (R&D), and facilitate the dissemination, adoption and commercialisation of the results (extension)  
协调或资助葡萄和葡萄酒研发，并促进研发成果的宣传、采用和商业化（推广）
- control the export of wine from Australia, and  
管控澳大利亚葡萄酒的出口事务，以及
- increase the demand for Australian wine, both in Australia and overseas, through targeted promotion and marketing activities.  
通过有针对性的推广和营销活动，增加澳大利亚葡萄酒的国内外需求。

We also enhance commercial opportunities through regulation, market access and market insights.

我们还通过监管、市场准入和市场洞察来增加商业机会。



# Wine regulation – why is it important?

## 葡萄酒监管 - 其重要性在哪里？

**Regulates the Australian wine industry to ensure:**

监管澳大利亚葡萄酒行业，以确保：

- Merchantability, quality and safety of Australian wine  
澳大利亚葡萄酒的适销性、品质和安全
- Truthfulness of wine labels  
葡萄酒标签真实无误
- Demonstration of compliance with importing country requirements  
出口的葡萄酒符合进口国的要求

**This is an important function to support the ongoing growth, integrity and sustainability of Australian wine exports.**

这是支持澳大利亚葡萄酒出口实现持续增长、诚信经营和可持续发展的一个重要职能部门。





# Regulatory Framework

## 监管框架

### Export controls

#### 出口管控

- Licensing  
出口许可
- Product approval  
产品审批
- Shipping approval  
装运审批

### Blending rules

#### 混合规则

### Controls on description and presentation (Register of Geographical Indications and Other Terms)

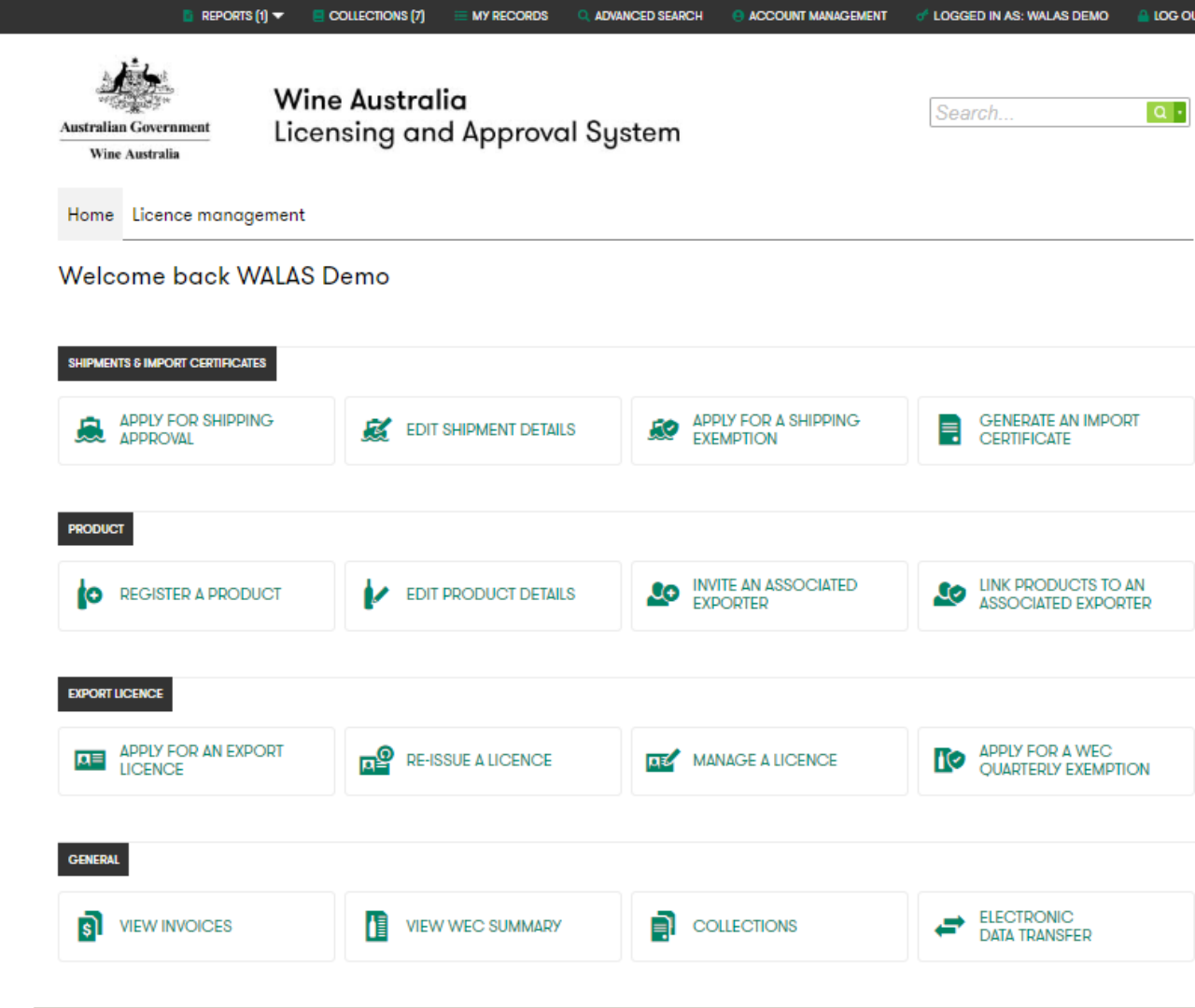
#### 产品描述和包装外观管控（地理标识和其他条目登记）

### Controls on production and labelling – Food Standards Code

#### 生产和标签管控 - 《澳大利亚新西兰食品标准法典》(Australia New Zealand Food Standards Code)

### Label integrity program

#### 标签诚信计划





# The Label Integrity Program

## 标签诚信计划

### Purpose

#### 目的

- The advancement of the truthfulness & reputation for truthfulness of statements made on Australian Wine labels.  
提高澳大利亚葡萄酒标签声明的真实性和信誉度。

### Fundamental Concepts

#### 基本概念

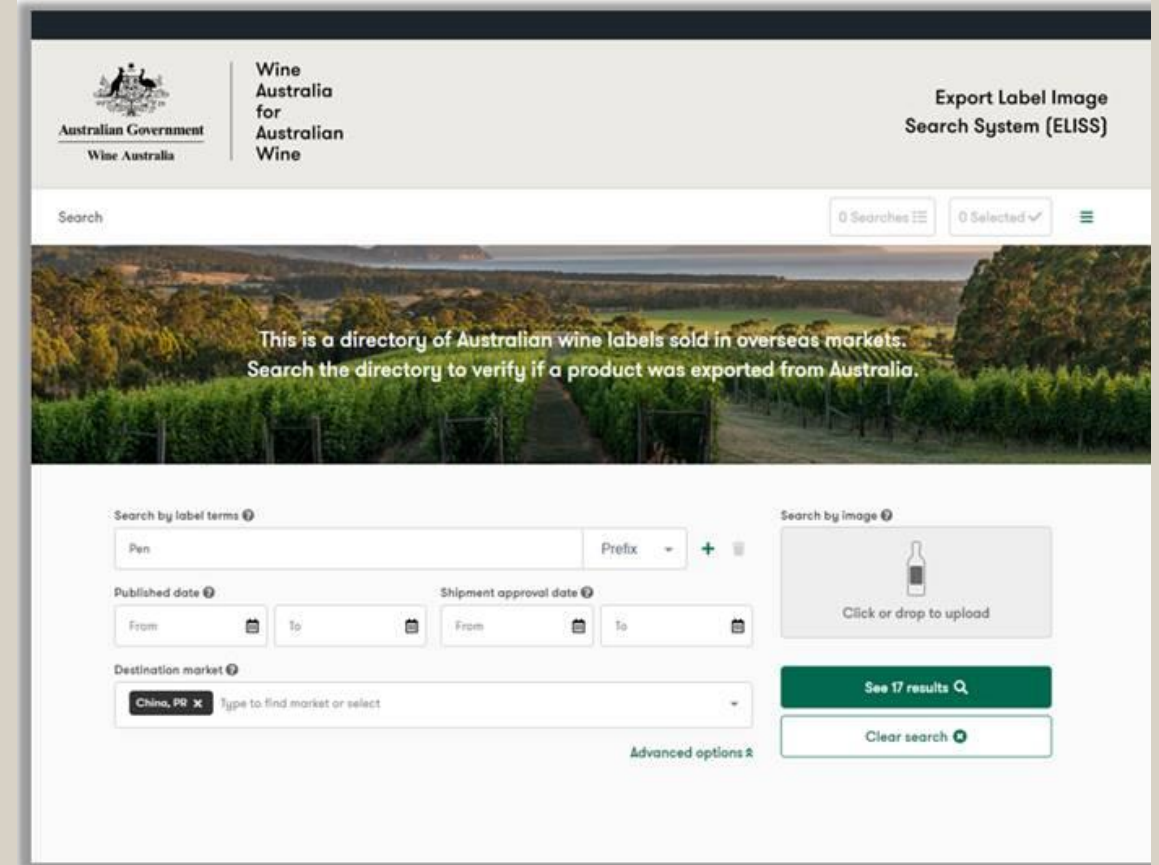
- Label claims are not mandatory – however; if a label claim is made, then an audit trail from finished product back to grape purchase must exist to substantiate any claim.  
标签声明非强制性要求，但如果进行了标注，那么必须具备从葡萄酒成品回溯至葡萄采购的审计追踪必不可少，以证实任何声明的真实性。
- The Label Integrity Program does not prescribe how records are to be kept, only the information that must be recorded. This gives wine manufacturers complete flexibility in choosing a system that best suits their needs.  
标签诚信计划没有规定应如何保存记录，只规定了必须记录的信息。这给了葡萄酒制造商充分的灵活性，他们可以根据自身需求选择最适合的系统。



# Wine Label Intellectual Property Directory

## 葡萄酒标签知识产权目录

- From 1 June 2021 exporters will be required to upload label images against their product applications in WALAS as a precursor to obtaining shipping approval.  
从 2021 年 6 月 1 日起，出口商在进行产品申请时必须在大澳大利亚葡萄酒出口许可与审批系统 (WALAS) 中上传其产品标签图片，作为获得装运批准的前提条件。
- This date is one-month earlier than the 1 July 2021 date upon which ELISS will go-live to ensure the Label Directory is populated with labels prior to the public go-live of ELISS. Only labels exported after 1 July 2021 will appear on ELISS.  
而出口标签图像搜索系统 (ELISS) 将于一个月后，即 2021 年 7 月 1 日上线，以确保在 ELISS 正式上线前将产品标签录入标签目录中。只有 2021 年 7 月 1 日之后出口的产品标签才会出现在 ELISS 中。



# Export report 出口报告

1 Apr 2020 to 31 Mar 2021  
2021年4月1日 - 2021年3月31日



Total exports  
出口总额

▼ -4%

\$2.77 billion 27.7 亿澳元

Volume 724 million litres  
总出口量 7.24 亿升 ▼ -1%

Average value \$3.82/litre  
均价 3.82 澳元/升 ▼ -3%



Exports by price point  
above \$10/litre

出口价格高于10澳元/升的葡萄酒出口额

▼ -32% ▼ -16% ▼ -14% ▼ -23% ▲ 28% ▼ -2% ▲ 43%



\$172m 1.72 亿澳元  
\$73m 0.73 亿澳元  
\$182m 1.82 亿澳元  
\$109m 1.09 亿澳元  
\$339m 3.39 亿澳元  
\$63m 0.63 亿澳元  
\$81m 0.81 亿澳元

## Value of exports to the top 10 markets 出口额前十大市场

	China inc. HK and Macau 中国 (包括香港和澳门)	\$1.02b 10.2 亿澳元	▼ -18%
	United Kingdom 英国	\$461m 4.61 亿澳元	▲ 33%
	United States 美国	\$432m 4.32 亿澳元	▲ 4%
	Canada 加拿大	\$195m 1.95 亿澳元	▲ 9%
	New Zealand 新西兰	\$104m 1.04 亿澳元	▲ 10%
	Singapore 新加坡	\$86m 0.86 亿澳元	▼ -17%
	Germany 德国	\$56m 0.56 亿澳元	▲ 19%
	Japan 日本	\$44m 0.44 亿澳元	▼ -13%
	Malaysia 马来西亚	\$40m 0.40 亿澳元	▼ -2%
	Netherlands 荷兰	\$40m 0.40 亿澳元	▼ -4%

## Volume of exports to the top 10 markets (9L cases) 出口量前十大市场 (9升桶)

	United Kingdom 英国	29.3m 0.293 亿	▲ 21%
	United States 美国	15.0m 0.150 亿	▼ -1%
	China inc. HK and Macau 中国 (包括香港和澳门)	9.6m 0.096 亿	▼ -37%
	Canada 加拿大	6.0m 0.060 亿	▲ 4%
	Germany 德国	4.0m 0.040 亿	▲ 22%
	New Zealand 新西兰	3.4m 0.034 亿	▲ 3%
	Denmark 丹麦	2.1m 0.021 亿	▲ 5%
	Netherlands 荷兰	1.7m 0.017 亿	▼ -6%
	Japan 日本	1.4m 0.014 亿	▼ -19%
	France 法国	1.0m 0.010 亿	▲ 27%



60%  
of wine produced  
is exported  
60%葡萄酒用于出口



2,426  
active exporters  
2,426家活跃出口商



18.5 million  
glasses of Australian wine enjoyed  
overseas each day  
每天有1,850万杯澳洲葡萄酒在海外市场被享用



24,664  
different products exported  
出口24,664种葡萄酒产品



# Interactive Insights Dashboard

## 交互式洞察力控制面板

- Expected go-live early May 2021  
预计于 2021 年 5 月初上线
- Builds on the work done in the last two years on the data warehouse to upgrade to more modern infrastructure  
基于过去两年在数据仓库上所做的工作，旨在升级为更具现代化的基础设施
- The project has two main objectives:  
该项目有两个主要目标：
  - provide all stakeholders with improved access to the data and insights in a more efficient and interactive way  
以更高效和交互的方式为所有利益相关者提供获取数据和见解的更佳途径
  - improve the process and outputs of the National Vintage Survey.  
改进《全国酿酒葡萄收获报告》(National Vintage Survey) 的流程和结果。

Exports by country, container and colour – volume ('000 L)

Destination Market	Unpackaged			Glass bottle			White			Sparkling			Total		
	2020 % change	2020 % change	2020 % change	2020 % change	2020 % change	2020 % change	2020 % change	2020 % change	2020 % change	2020 % change	2020 % change				
United Kingdom	122,914	▲ 13%	18,705	▲ 95%	-	▼ -100%	88,654	▲ 6%	17,894	▲ 9%	607	▼ -3%	265,793	▲ 10%	
United States of America	16,414	▼ -15%	42,240	▼ -5%	-	▼ -100%	36,695	▼ -3%	53,550	▲ 7%	-	▼ -100%	96,141	▲ 24%	
China, PRC	19,720	▼ -18%	95,475	▼ -11%	337	▲ 37%	408	▼ -67%	3,869	▼ -23%	3,869	▼ -23%	106,751	▼ -15%	
Canada	11,772	▼ -4%	15,349	▲ 2%	100	▲ 59%	16,778	▼ -23%	4,435	▲ 23%	381	▲ 54%	32,221	▼ 7%	
Germany, Federal Republic	14,112	▲ 10%	1,879	▼ -23%	-	na	17,498	▲ 2%	417	▲ 17%	na	-	18,915	▲ 7%	
New Zealand	8,042	▼ -17%	11,987	▲ 10%	465	▲ 40%	8,437	▼ -5%	3,310	▲ 12%	627	▲ 17%	23,776	▲ 12%	
Denmark	10,670	▲ 84%	891	▼ -13%	-	na	6,422	▲ 51%	710	▼ -6%	na	-	17,202	▲ 53%	
Japan	2,983	▼ -28%	3,227	▼ -2%	1418	▲ 7%	2,403	▼ -27%	2,138	▲ 9%	793	▼ -23%	9,148	▲ 26%	
Netherlands	1,638	▼ -20%	3,367	▼ -4%	-	na	4,298	▼ -41%	4,401	▲ 0%	242	▼ -17%	9,642	▼ 1%	
France	4,948	▲ 95%	84	▼ -15%	-	▼ -100%	3,568	▲ 32%	61	▼ -14%	441	▲ 53%	9,102	▲ 61%	
Belgium	2,794	▲ 10%	482	▼ -7%	-	na	4,006	▼ -24%	718	▲ -62%	58	▼ -97%	8,946	▼ 2%	
		▼ -16%	508	▼ -14%	-	na	858	▼ -7%	118	▼ -4%	111	▼ -30%	2,025	▼ -4%	
		▼ -13%	133	▲ 21%	-	na	850	▼ -7%	24	▼ -61%	347	▲ 48%	1,074	▼ -2%	
		▼ -12%	-	na	890	▲ 69%	1,125	▼ -30%	0	na	370	▲ 89%	4,162	▲ 93%	
		▼ -20%	-	na	2,376	▲ 13%	359	▼ -27%	364	▼ -2%	304	▼ -64%	5,446	▼ 3%	
		▲ 17%	738	▲ 43%	-	na	573	▲ 18%	93	▲ 332%	52	▲ 49%	64	▼ -23%	
		▲ 17%	na	415	▲ 100%	1,473	▲ 42%	-	na	33	▲ 80%	40	▼ -13%	3,787	▲ 49%
		▼ -30%	240	▼ -61%	48	▼ -62%	591	▼ -28%	62	▼ -72%	187	▼ -67%	3,239	▼ 2%	
		▼ -30%	290	▼ -11%	-	na	539	▼ -60%	178	▼ -38%	158	▼ -50%	2,528	▼ 40%	
		▼ -17%	15	▼ -76%	-	na	418	▼ -16%	3	▲ 1%	11	▼ 3%	2,446	▼ 15%	
		▲ 17%	18	▲ 281%	24	na	525	▲ 38%	-	na	136	▲ 61%	2,309	▼ 1%	
		▼ -7%	0	na	254	▲ 22%	80	▲ 47%	18	▲ 59%	105	▼ 3%	2,285	▲ 5%	
		▼ -6%	-	na	48	▲ 100%	949	▲ 4%	-	na	279	▼ 2%	2,035	▼ 2%	
		▲ 17%	62	▼ -14%	475	▲ 12%	-	na	18	▼ -23%	22	▼ -50%	1,318	▼ 2%	
		▼ -15%	445	▼ -30%	515	▼ -34%	2,298	▼ -18%	338	▼ -24%	171	▼ -44%	3,077	▼ 2%	
		▼ -8%	4,950	▲ 1%	197,627	▼ -3%	62,997	▲ 2%	2,940	▼ -6%	54,748	▼ 10%	171,975	▼ 1%	

Export Report

12 months to 30 September 2020

Wine Australia for Australian Wine

- Current state:  
当前状态：
  - Export and National Vintage reports are static PDFs provided on the Wine Australia website, which take the Market Insights team a large amount of time to produce and check  
出口和全国酿酒葡萄收获报告是在澳大利亚葡萄酒管理局网站上发布的静态 PDF 文件，为此市场洞察力团队花了大量时间进行制作和核查
  - The National Vintage Survey processing is very manual and stored in a legacy format  
《全国酿酒葡萄收获报告》的数据处理流程基本依靠人工方式，并以传统格式进行存储

Wrattonbully												SA	
Varying	Tonnes purchased	Price dispersion					Total value purchased	Average purchase value per tonne	Change in price per tonne	Winning growth	Share of winery grown	Total crushed	Estimated total value of grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
Red													
											0%	2	\$3,278
										1	100%	1	\$2,191
	1,047	431	175	\$2,562,944	\$1,950	6%	2,502	61%	4,245	\$6,580,731			
	20	3		\$25,910	\$1,125	-4%	0%	23		\$25,910			
	167	86	19	\$372,820	\$1,272	23%	653	71%	925	\$1,269,108			
										20	100%	20	\$22,711
	110			\$155,217	\$1,110	7%	22%	62%	264	\$924,438			
										20	100%	20	\$26,855
	864	285	148	\$2,027,825	\$1,539	0%	1,648	56%	2,065	\$9,544,615			
										2	22%	11	\$30,040
	2,237	808	371	\$5,171,831	\$1,514	11%	5,161	60%	8,577	\$12,930,776			
	635		74	\$706,730	\$906	26%	561	44%	1,271	\$1,265,420			
	3									0%	3	\$2,000	
	456	80		\$680,201	\$1,269	41%	1,217	71%	1,853	\$2,351,584			
	34									0%	34	\$25,830	
	12									25	75%	47	\$46,600
	178									352	66%	830	\$425,234
										46	100%	46	\$42,276
										11	100%	11	\$15,709
	1,319	80	74	\$1,570,411	\$1,056	39%	2,322	41%	3,795	\$4,174,554			
	3,556	888	445	\$6,742,242	\$1,379	6%	7,483	60%	12,372	\$17,107,330			



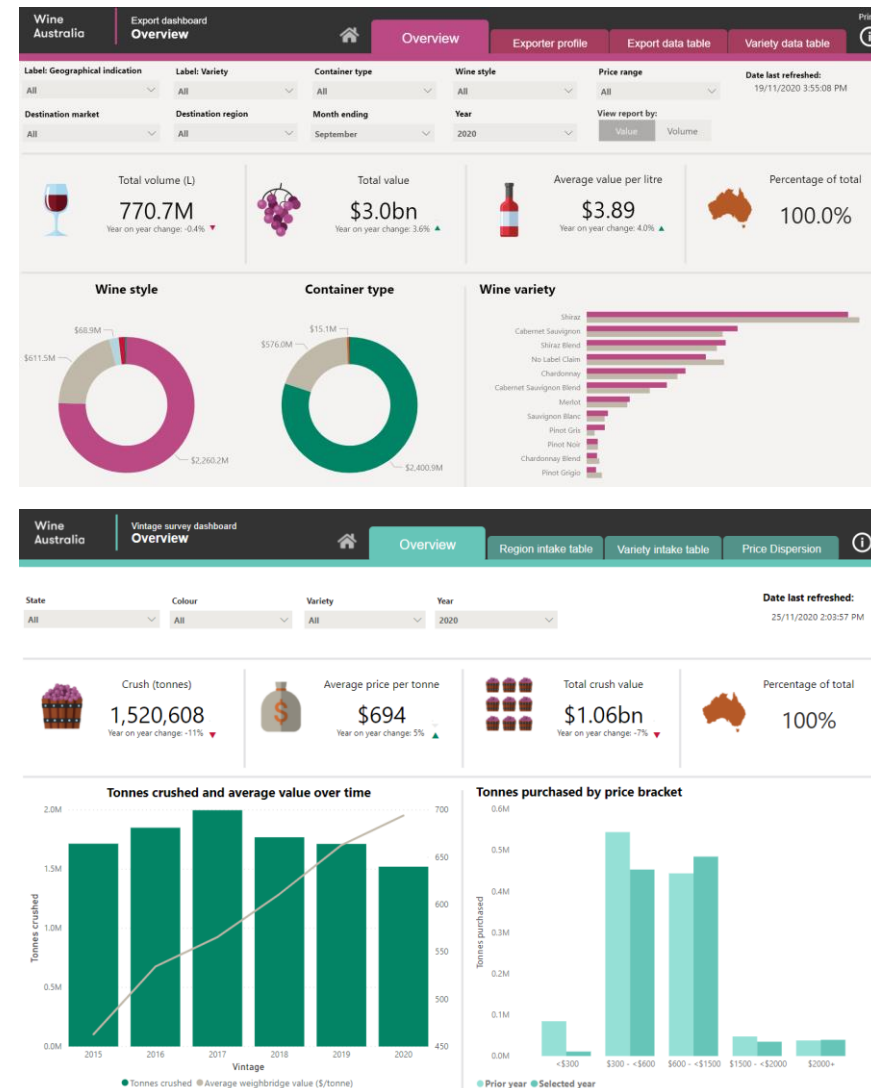
### National Vintage Report 2020

#### At a glance summary

- The Australian winegrape crush for 2020 is estimated to be 1.52 million tonnes
- The crush is 62 per cent below the 2019 harvest and 13 per cent below the 10-year average of 175 million tonnes
- The average winegrape purchase price increased by 5 per cent to \$674 per tonne
- The total estimated value of the crush decreased by 9 per cent from \$1.9 billion in 2019 to \$1.67 billion, with the reduction in crush partly compensated for by the increase in average value
- South Australia was the largest contributor with 42 per cent of the national crush, followed by NSW (32 per cent) and Victoria (17 per cent)
- The largest individual region was the South Australian Riverland, accounting for 34 per cent of the national vintage, followed by Murray Darling-South Hill in Vic/NOW (25 per cent) and Riverina NSW (20 per cent)
- Red varieties overall were down by 11 per cent while white varieties were down by 13 per cent
- Shiraz was the largest variety with a crush of 376,000 tonnes, accounting for 25 per cent of the total crush – an increase in share of one percentage point
- Chardonnay was the second largest variety overall and largest white variety with 285,000 tonnes but declined by two percentage points to 19 per cent and reduced its share of the total crush
- Of the top 10 red varieties, Merlot and Malbec/Muscadine declined the most, while Pinot, Ruby Cabernet and Petit Verdot all increased slightly against the general trend
- Of the top 10 white varieties, Riesling and Chardonnay declined the most, while Pinot and Pinot Gris/Crisp were the only two that did not decline

# Future state 未来状态:

- National Vintage Survey processing is brought into the data warehouse  
将在数据仓库中引入《全国酿酒葡萄收获报告》的数据处理流程
- Dashboards using the new National Vintage Survey dataset  
使用全新《全国酿酒葡萄收获报告》数据集的控制面板
- Dashboards for the quarterly export data  
季度出口数据控制面板
- The Market Insights team will be upskilled to maintain the solution  
市场洞察力团队将提高技能来维护该解决方案
- Data downloading and print to PDF will be available  
可下载数据并打印 PDF 格式文件





# 2021-22 Marketing Strategy

## 2021-22 营销战略

- Focused Wine Australia marketing investment on key markets of USA, Canada, UK and collaboration with Austrade in other markets.

澳大利亚葡萄酒管理局将重点投资美国、加拿大、英国等主要市场，并与澳大利亚贸易委员 (Austrade) 合作开拓其他市场。

- Growth in traditional markets and continued investment on market presence in USA, Canada and UK to deliver strategic plan priorities. Wine Australia will maintain a presence in China.

在传统市场实现增长，并继续投资美国、加拿大和英国市场以提高市场影响力，从而完成战略计划优先事项。澳大利亚葡萄酒管理局将继续在中国开展业务。

- Investment in priority markets is at lower levels than previous years due to cessation of \$50M Package and lower Wine Export Charge.

随着 5000 万澳元葡萄酒出口支持计划的结束和葡萄酒出口费用的降低，我们对重点市场的投资力度低于往年。



# 2021-22 Marketing Strategy

## 2021-22 营销战略

Continued investment in key priorities:

继续投资的重点优先事项:

- Australian Wine Connect 平台
- Distributor and retailer promotions in the USA  
美国境内的经销商和零售商促销活动
- Australian Wine Discovered  
探索澳大利亚葡萄酒 (Australian Wine Discovered) 教育课程
- Market Entry Program (USA)  
市场准入计划 (美国)
- Engagement in Canada with SAQ, LCBO etc  
与加拿大魁北克省酒业协会 (SAQ)、安大略省酒管局 (LCBO) 等机构开展合作
- Social media  
社交媒体
- Sustainable Winegrowing Australia (SWA)  
澳大利亚可持续酿酒葡萄种植协会 (Sustainable Winegrowing Australia, SWA)



# Export Market Guides

[Export Market Guide - Brazil](#)

Version 15, at 31 Mar 2019 ✓

[Export Market Guide - Cambodia](#)

Version 4, at 27 Feb 2019 ✓

[Export Market Guide - Canada](#)

Version 18, at 16 Nov 2018 ✓

[Export Market Guide - Chile](#)

Version 4, at 05 Jun 2019 ✓

[Export Market Guide - China](#)

Version 27, at 23 Jan 2019 ✓

[Export Market Guide - European Union \(EU\)](#)

Version 29, at 17 Apr 2019 ✓

[Export Market Guide - Fiji](#)

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[Export Market Guide - India](#)

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