

# South Australian Wine Industry Snapshot

December 2020



**SOUTH AUSTRALIAN WINE INDUSTRY**  
ASSOCIATION INCORPORATED

# South Australian wine industry – December 2020 snapshot

In this, the fourth year of the South Australian Wine Industry Snapshot, we explore the impact of drought, bushfires, a pandemic, and new levels of global economic uncertainty.

Insights into the status and performance of our market have never been more important.

Welcome to the fourth edition of the South Australian Wine Industry Snapshot - a collaboration of full service advisory firm Bentleys SA/NT and the South Australian Wine Industry Association.

2020 has been the most disruptive year in recent history for South Australia's wine industry. We have endured significant and unforeseeable environmental, political, health, and economic hardships. Many of our business plans have been reworked accordingly. For some of us, plans may still remain up in the air, dependent upon international trade opportunities or the return of more certainty to our working lives.

So it is understandable that this year business confidence has dropped among participating wine businesses. COVID-19, China's investigations into product dumping and countervailing duties, the potential ban on wine imports, drought and bushfires, have all taken their toll on confidence within our industry.

Can we recover from this? We believe the answer is yes.

In response to the events that have led up to and taken place in 2020, our industry has evolved with new business models, strategies, and systems, many of which will be sustained beyond COVID-19.

This annual study aims to support continued growth and resilience, by providing wine businesses with insights to support decision making, and to compare and monitor performance.

In reviewing the challenges experienced this year, we have uncovered many inspiring examples of innovation, evolution and hope.

Since implementing this research, events have continued to unfold (including a second COVID-19 lockdown, the federal budget, and China investigations), so we have included additional notes in this report in recognition of these.

Despite all the events of 2020, we must remain confident as an industry.

Today, we call on all wine businesses of South Australia to continue to demonstrate the world-leading practices that enable resilience and sustained growth.



**Brian Smedley**  
Chief Executive  
South Australian Wine Industry Association



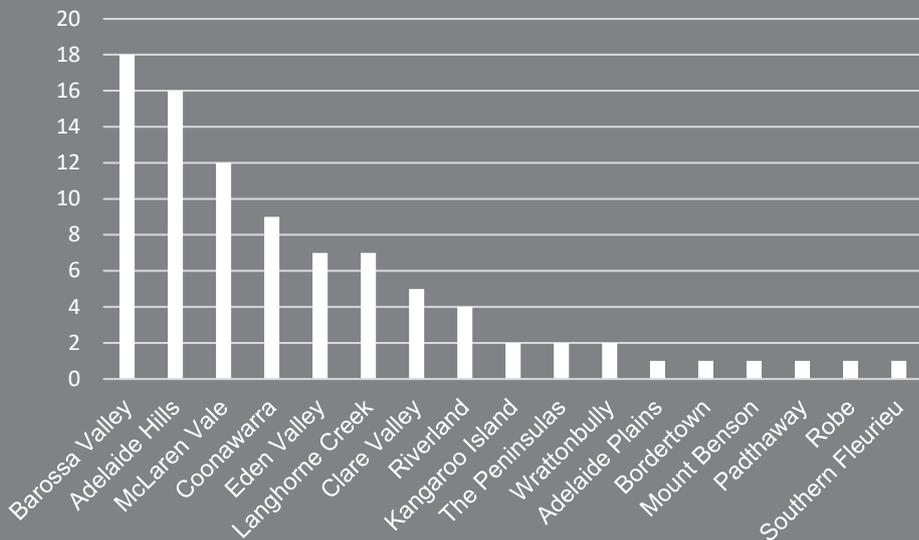
**Tim Siebert**  
Partner, Business Services  
Bentleys SA/NT

The 2020 South Australian Wine Industry Snapshot unpacks the current status of the wine industry, and outlines some key opportunities to support continued resilience and growth.

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## About the participants

63  
participants



Sixty three South Australian wine businesses participated in this study, in a year that has required adaptation, evolution, and renewal.

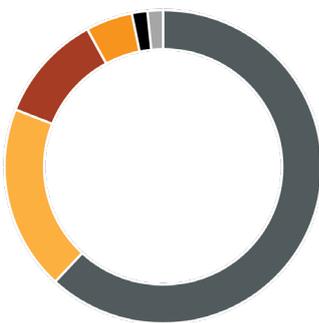
Most participants were winemakers, who run their own private companies, grow their own grapes, operate cellar doors, and generate annual revenues of less than \$5 million.

### Location

More than half of the assets of this year's participants were located in the larger wine regions of the Barossa Valley, Adelaide Hills and McLaren Vale.

### Business type

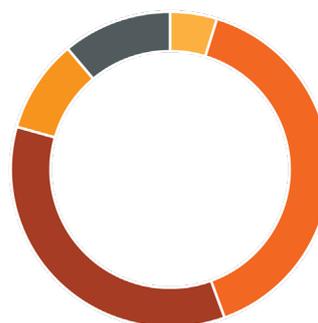
The majority of participating businesses were private companies (62%) or trusts (19%).



Private company	62%
Trust, with trustee company	19%
Partnership	11%
Family trust	4%
Sole trader	2%
Public company	2%

### Business lifecycle

Most participating businesses were in the growth (40%) or mature (35%) phases of the business lifecycle, while others were in a phase of evolution (9%) or in the process of succession (11%). No participants were planning to exit the industry.



Start up	5%
Growth	40%
Mature	35%
Evolution	9%
Succession	11%

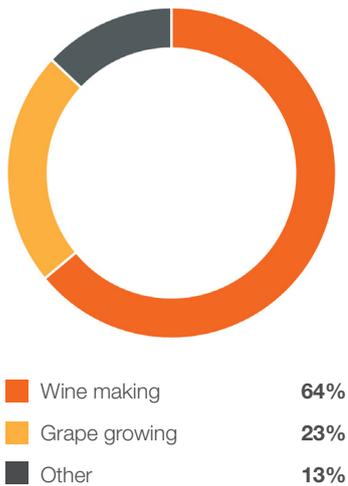
### Business size

Almost three quarters (73%) of participating wine businesses were small businesses, with annual revenues of less than \$5 million.



### Source of revenue

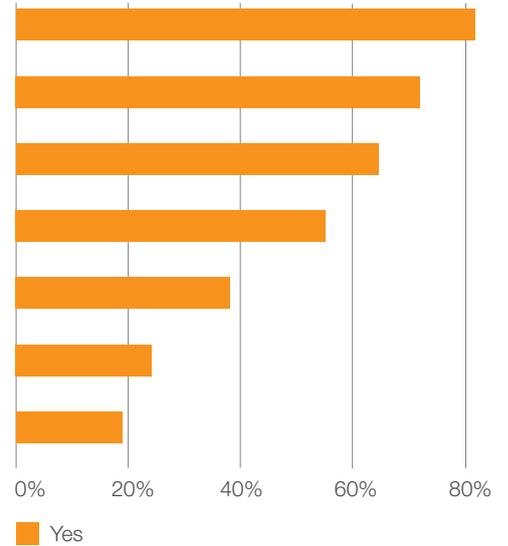
On average, wine making accounts for almost two thirds (64%) of the income generated by participating wine businesses.



### Facilities

Most (83%) participating wine businesses own their own wine grapes, and operate a cellar door (73%). Only 19% lease a grape processing plant.

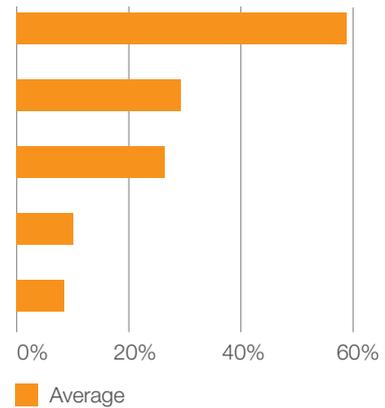
- Do you grow your own wine grapes?
- Do you operate a cellar door?
- Do you purchase a percentage of wine grapes processed?
- Do you own a grape processing plant?
- Do you intend to change your facilities in the next 12 months?
- Do you purchase all wine grapes processed?
- Do you lease a grape processing plant?



### Tourism revenue

Wine tourism experiences, including cellar door and festival experiences, accounted for an average of 59% of tourism income generated, making it the biggest tourism income earner for the participants.

- Wine tourism experience
- Cafe / Restaurant
- Commission-able products
- Function centre or similar facility
- Accommodation





**Brian Smedley**

Chief Executive  
South Australian Wine Industry Association



At the end of an extraordinarily challenging year, business confidence is lower than normal, but there is significant opportunity for continued advancement and sustained growth.

### Uncertain times for our industry

2020 has been an extraordinarily challenging year for the wine industry.

Vintage conditions were extraordinarily difficult. On the back of a long, harsh dry period, we commenced the year with savage bushfires and some unfavourable weather events. This year's utilisation levels of processing plants have dropped accordingly.

Then COVID-19 struck and the economic impact was immediate, with different rules and reduced capacity forcing cellar doors to reduce opening hours and sell take away.

There remains uncertainty in relation to the China wine market with investigations underway into anti-dumping and countervailing duties, and a potential ban on Australian wine products.

Challenges in servicing domestic and international markets, or to respond to export orders, has contributed to a significant drop in business confidence this year, compared to the last three years.

The support offered by both federal and state governments has been recognised by this year's participants as a valuable lifeline which has enabled continued operation.

However, the full effect of this year's events may not be known for some time, until after key stimulus measures cease in 2021.

Despite the challenges and adversity, there is opportunity for continued advancement and sustained growth.

Businesses are reviewing and revitalising their business models to pursue new growth strategies, such as dealing direct with the consumer. For some, this has led to greater success and profitability.

An ability to change, innovate and evolve remains a critical success factor.

This may well be a defining time for South Australia's wine businesses.

I encourage all wine businesses to remain vigilant, and continue to adapt as leaders in domestic and global wine markets.

While the negative impact of COVID-19 has been substantial - particularly in relation to profitability and cash flow - it has also triggered a spike in innovation as wine businesses reach out to customers directly.



**COVID-19 - The most damaging force**

Like most other industry sectors, the pandemic has had a significantly damaging impact on South Australia's wine industry.

Most (88%) participants indicated that COVID-19 has had a 'significantly negative' (35%) or 'somewhat negative' (53%) impact on their businesses, making it the most damaging event in recent memory.



- Significantly negative impact 35%
- Somewhat negative impact 53%
- No impact 6%
- Somewhat positive impact 6%

**Inability to trade**

Seventy one per cent of participants identified their 'ability to service domestic and international markets' to be the most negative impact of COVID-19.

Export orders were also negatively impacted, with 64% of participants indicating they have been significantly or substantially reduced by the economic impacts of COVID-19.

Ability to service domestic and international markets

Export orders

Profitability

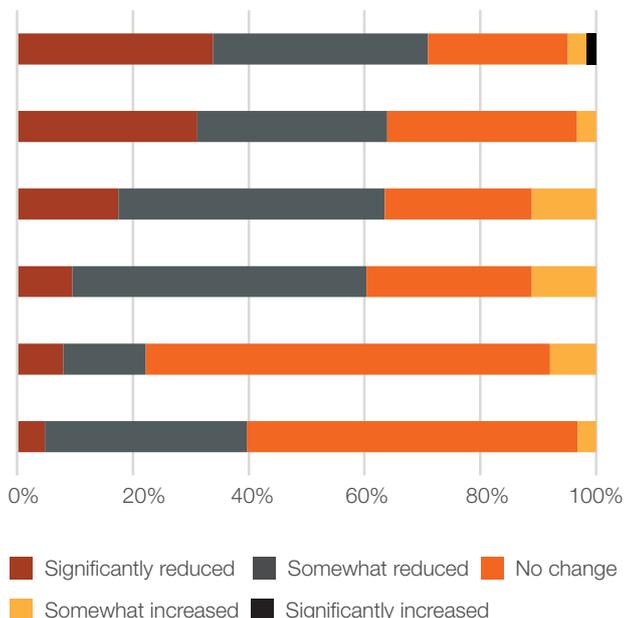
Cash flow

Ability to attract and retain staff needed for your business

Ability to service debts

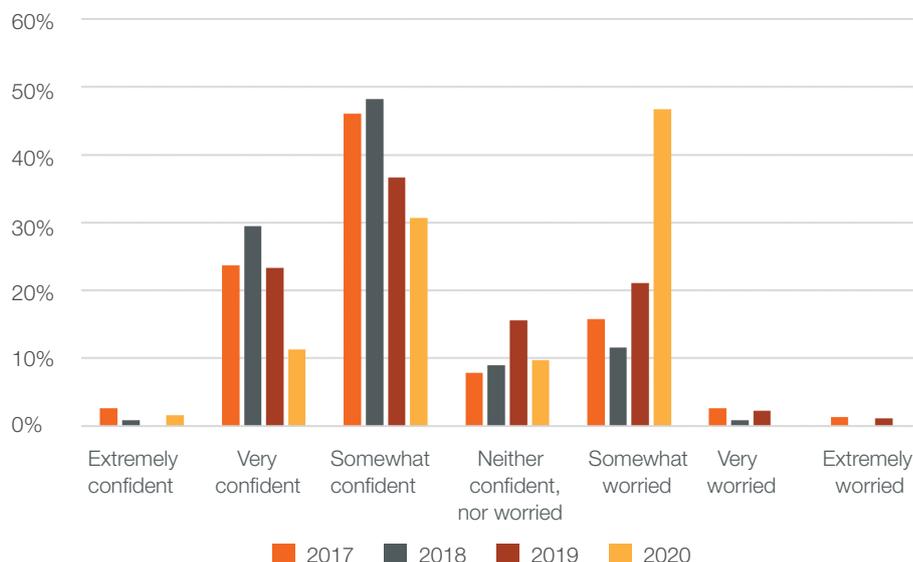
**Evolving and innovating**

When asked how wine businesses changed in response to COVID-19, many described how they have revitalised or activated their direct to consumer strategy to include greater focus on digital communications and online sales, while also evolving the cellar door to enable compliant, yet memorable consumer experiences. Pre-paid packages, virtual tasting sessions, and upgrades to visitor facilities, allowed businesses to resume operations.



“We anticipate the economy to be significantly impacted by COVID-19 in the first half of 2021, and we are unsure what the direct impacts to our business will be.”

- Snapshot participant



**Business confidence is lower**

For the first time in this study’s four year history, and reflective of an economy now in recession, we have seen a significant drop in business confidence levels with almost two thirds (65%) of this year’s participants indicating that their business confidence has decreased over the past 12 months.

Almost half of the participants (47%) have indicated they are ‘somewhat worried’ about the future of their business.

We asked participants to share the major reasons for their current level of business confidence. Participants indicated uncertainty surrounding the full impacts and duration of the pandemic, along with Australia’s changed relationship with China, as key reasons for their drop in business confidence.

**COVID-19 impacts**

Participants expressed significant concern in relation to the current, medium and longer term impacts of COVID-19.

COVID-19, and the associated compliance requirements, has had an immediate impact on businesses and their ability to sell product both overseas and domestically, to manage cash flow, and to forward plan.

In addition, COVID-19 has also led to a lower levels of profitability, a significant degree of stress, insecurity, and fatigue among business operators and their staff.

Looking to next year, the ongoing uncertainty in relation to COVID-19 impacts and duration, and the foreshadowed winding up of the JobKeeper payments, is worrying for participants and making forward planning extremely difficult.

**China investigations**

Australia’s trading relationship with China was also recognised as having a negative impact on business confidence. Investigations into product dumping, and the prospect of trading restrictions, have taken their toll.

Some participants were particularly concerned about the prospect of export opportunities diminishing or ceasing, and stock flooding the domestic market, sending local prices down, and putting significant pressure on smaller players.

More generally, it was recognised that Australia’s relationship with China will have a widespread impact on all wine businesses in South Australia, whether they deal directly with China or not.

**A market that favours the agile**

On the brighter side, the current challenging business conditions have favoured some of the more nimble businesses.

Some of the more agile wine businesses have managed to pivot, adjust their business models, and sell more product to local markets.

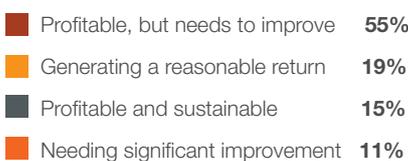
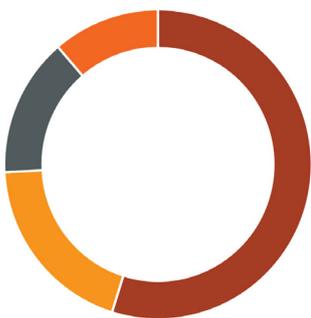
Keep on top of your cash flow during uncertain times. Talk with key customers to ensure prompt payments, and contact key suppliers to re-negotiate outgoings if necessary.



## Health of business

Two thirds (66%) of this year's participants have indicated that their businesses need to improve profitability levels to some extent, which is consistent with 2019 results.

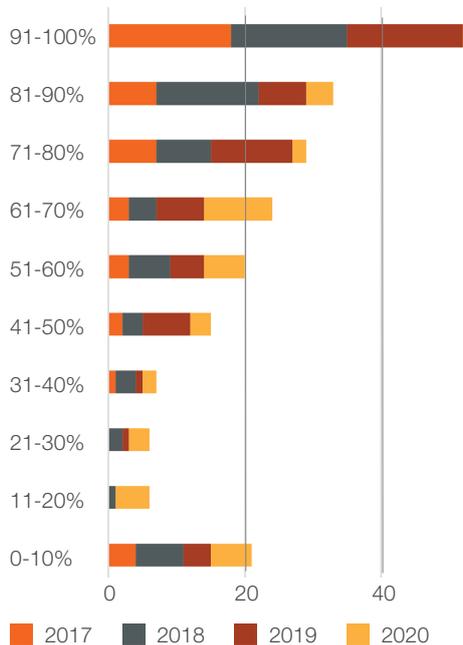
Over half (55%) of the participating wine businesses are 'profitable, but need to improve', while another 11% 'need significant improvement'.



## Utilisation down, reflecting the vintage

Many of the participants (66%) operated their own processing plants. Responses this year indicated a drop in their utilisation - reflective of the difficult 2020 vintage.

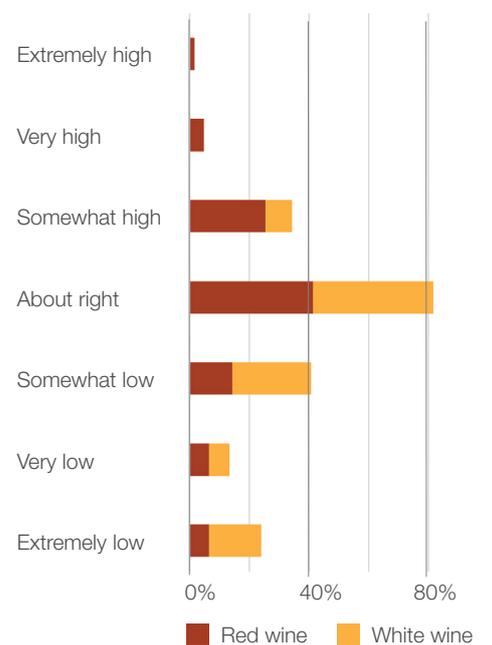
Almost half (45%) of this year's participants had utilisation levels below 50%. While a healthy proportion (38%) operated plants at 50%-70% capacity, previous levels of full operational capacity were not prevalent this year.



## Inventory levels are mostly right

While many participants (around 40%) are experiencing inventory levels of white and red wine that are about right, we have started to see inventory levels of white wine drop, with 51% of participants indicating levels of white wine are below desired levels.

In contrast, inventory of red wine is high for almost one third (31%) of participants.



Despite the very challenging year and concerns over mental health in the workplace, pleasingly, employment numbers are expected to stay the same over the year ahead.



**Resourcing challenges**

One third (34%) of this year’s participants have not had any difficulty attracting and retaining suitable staff. This compares to 52% who had no difficulty last year, suggesting the labour market may be more challenging today.

Functions that have presented the most difficulties to resource have been in the areas of vineyard operations and hospitality.

One in five participants (21%) found the greatest barrier to attracting suitable staff was their regional location, while recruitment

costs (17%) and lack of an experienced talent pool (16%) were also key barriers.

A significant portion (40%) of participants use labour hire services to facilitate their recruitment processes. Together, this year’s participants have recruited 247 full time equivalent (FTE) employees using these services over the past year.

The total number of FTEs to be employed in 2020/21 is expected to be similar to that of 2019/20.

**Mental health**

With the difficult year that has been, it is understandable that mental health has risen as an important issue to be addressed in the workplace.

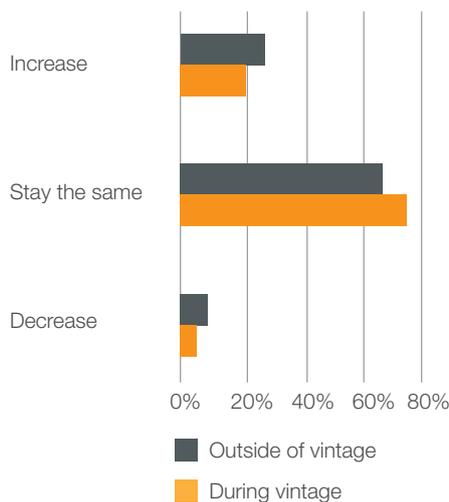
Almost three quarters of participants (74%) have indicated some level of concern about the mental health of the people who they work with.

Not one participant dismissed mental health in the workplace as an issue that is ‘not applicable’.

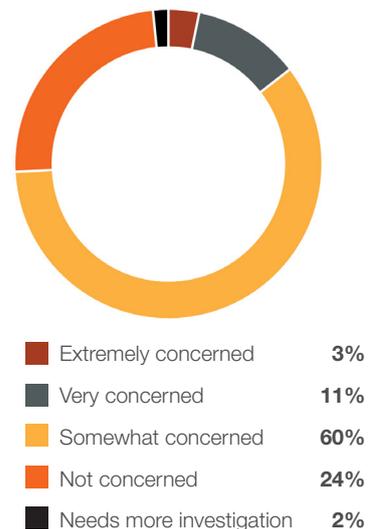
**In which area of your business have you been most challenged to attract and retain staff?**



**What changes to FTE staff do you expect in 2020/21, compared to 2019/20?**



**How concerned are you about mental health in your work place?**





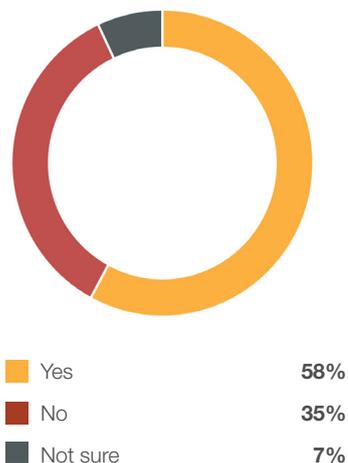
JobKeeper has provided valuable support to the wine businesses of South Australia.

**JobKeeper access and influence**

Three quarters (75%) of this year's participants have accessed the Federal Government's JobKeeper payments as a means of sustaining operations during COVID-19.

For more than half of these participants (58%), access to JobKeeper payments has impacted decision making in relation to the ongoing operations of their business.

Has accessing the Federal Government's JobKeeper payments impacted your decisions in relation to the operations of your business?

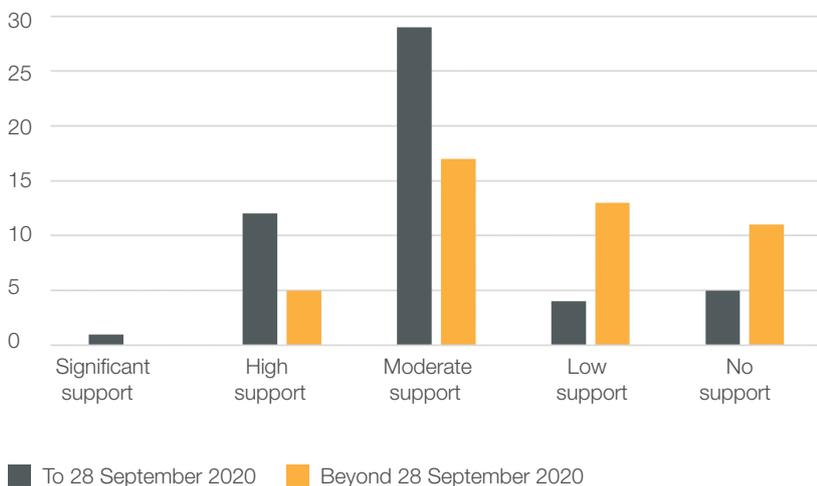


**Keeping businesses operational**

Participants reported that JobKeeper payments have been quite effective in keeping their businesses operational - without implementing other major changes - through to 28 September 2020, with 82% of participants drawing moderate to high levels of support from the stimulus measure.

It was recognised that the value to be drawn from JobKeeper would significantly diminish beyond 28 September 2020, as the measure is wound back.

To what extent do you expect JobKeeper to enable your business to continue to be operational without major staffing and operation changes?



*To note, there have been several Australian Government announcements since this survey closed in early October 2020. We now know there is additional support available to Australian businesses, which includes the JobKeeper extension scheme (commenced on 28 September 2020), and the JobMaker scheme (commenced on Federal Budget night, 7 October 2020). For more details, please contact the South Australian Wine Industry Association or your local Bentleys advisor.*

## Other environmental impacts

A tragic year for many, with devastating bushfires following a drought. The Cudlee Creek fire alone destroyed over 12,000 hectares of vineyards and about 30% of Adelaide Hills' production. Then the pandemic struck.

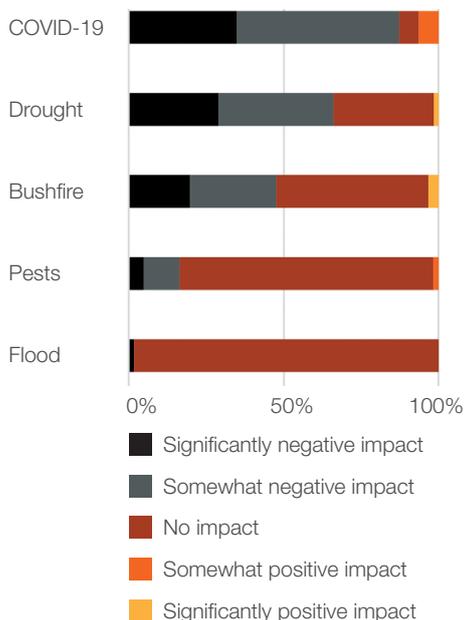


### COVID-19 and drought most damaging

COVID-19 was identified as the most damaging environmental event affecting wine businesses in 2020, with 87% of this year's participants indicating the pandemic has had negative impact on their business.

The drought was the second most damaging event, with two thirds (66%) of the participants indicating it has had a negative impact.

Bushfires negatively impacted almost half (47%) of the participants.

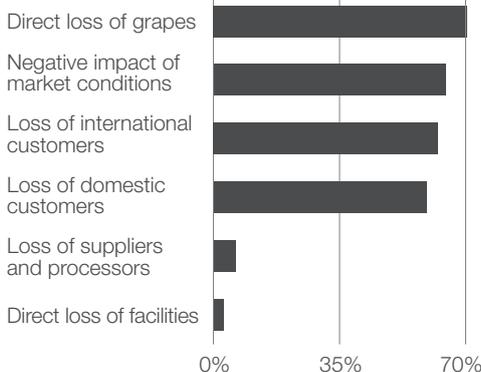


### Four clear business impacts

More specifically, the damaging environmental events have affected participating wine businesses through 'direct loss of grapes' (70%), the negative business impact of market conditions (65%), along with the loss of international (62%) and domestic customers (59%).

A small number of participants (6%) experienced a positive business impact, some benefiting from others' misfortune (such as having tourism redirected from fire affected locations).

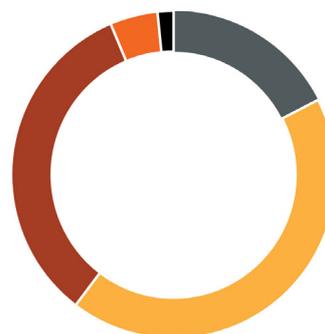
### Have these environmental events impacted your business? (Select all that apply)



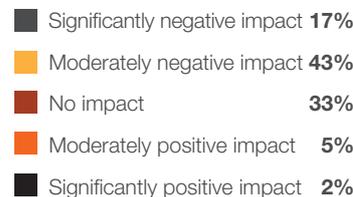
### Substantial opportunity and financial cost

The year's events have also had a negative impact on longer term business planning (such as timing of succession or generational transfer) for 60% of the participants.

When asked more specifically about the likely financial impact, the answers varied from 'no change foreseen' to a loss of up to 71% of annual turnover.



### How have the events of the past 12 months impacted the longer term plans of your business?



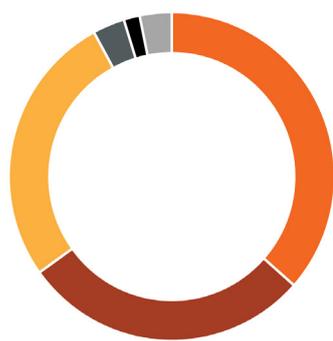
As our current trade relationship with China continues to come under pressure, South Australia's wine businesses are becoming extremely concerned about the future of this market.



### Concern over anti-dumping allegations

South Australian wine exports to China were valued at more than \$1.2 billion in 2019.

It is therefore of little surprise that participating wine businesses are extremely concerned about the potential impact of the China anti-dumping investigations on their businesses.



How concerned are you about the potential impact of the China anti-dumping investigations on your business?

Extremely concerned	36%
Very concerned	29%
Somewhat concerned	27%
Not concerned	3%
Need more information	2%
Not applicable	3%

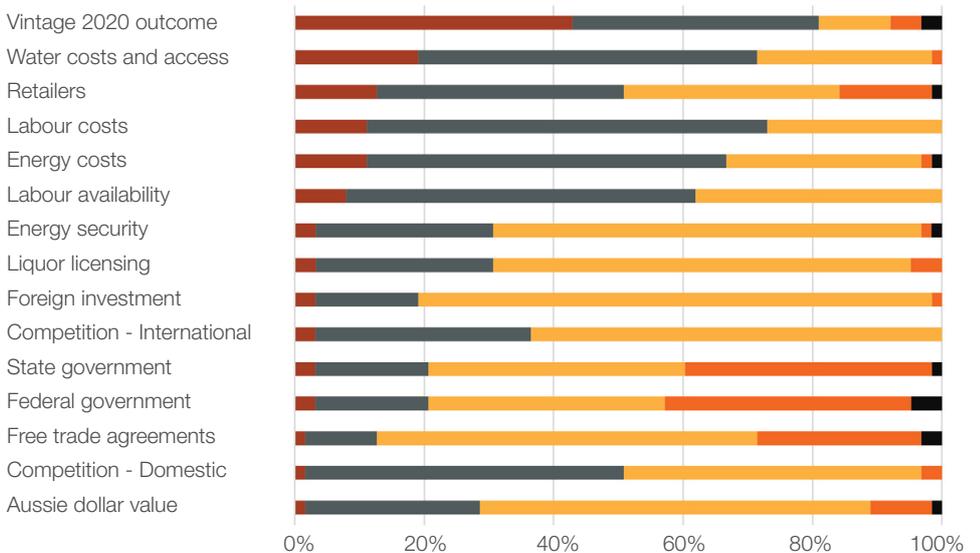
### Other environmental forces

Similar to last year, participants expressed significant concern about the cost of doing business. Water, labour and energy costs all ranked among the top five negative business impacts for the past 12 months.

Of most concern, however, and following a year involving challenging weather

conditions, was the yield outcome of the 2020 vintage.

The impact of both state and federal governments - which have provided valuable short term stimulus packages to the industry - was recognised as having the most positive impacts on wine businesses in 2020.



What impact are other environmental factors having on your business today?

Very negative	Moderately negative	No impact
Moderately positive	Very positive	



**Tim Siebert**  
Partner, Business Services  
Bentleys SA/NT



This is a challenging, yet very interesting time for South Australia's wine sector.

It's a time to review your business model, invest in innovation, and consider new e-commerce strategies, as an extension of your brand, to engage profitable new customers.

### Agility versus preparedness and sustainability

No one could predict the events of 2020 or their severity.

This year, people have been financially impacted, and they have responded to the unforeseen by adapting both strategically and operationally.

South Australia's wine producers are to be commended for accessing available stimulus support, and taking action to innovate and evolve in response to the changed environmental conditions.

Online engagement with customers, e-commerce and virtual wine tastings are just some of the examples of innovation and evolution among the participating businesses. They have demonstrated an ability to change, and to engage with new and existing markets differently and effectively.

What next?

At the time of writing this commentary (despite the second South Australian 'lockdown'), there is emerging confidence. Rays of light to suggest the domestic economy could rebound quite quickly and 2021 may bring more certainty and normality.

A recent lift in full-time local employment numbers, rising house prices, and an up-tick in construction approvals, all indicate the South Australian economy is on the rebound.

Now is the time to plan for the future and for sustainable growth.

Wine business must plan for business continuity and have the correct support and information at hand to respond to unforeseen events, such as COVID-19.

Continued investment in innovation, product and marketing evolution, continuity planning and well informed advisors, will future-proof businesses for the years ahead.

We are seeing South Australia's wine industry to take leadership, not just as wine producers but as business leaders prepared to embrace change.

I encourage all wine businesses to take action, ensure you have a robust business continuity plan, as well as quality business and financial information and suitable support, to protect your business from similar negative and unforeseen events.

Great wine, evolving products and marketing innovation will be in the tool box of the smart, and successful business leaders. This is the future of the wine industry.



## Strategic focus

Unlike previous years, and reflective of our time and the need to adapt, many of this year's participants (41%) indicated a commitment to diversification - the riskiest growth strategy involving new products for new markets.

At a time when international trading conditions have been uncertain or challenged, local market penetration was favoured as a key growth strategy for 61% of participants, while improving profit margins was the lead strategy for 69%.



<span style="color: #f4a460;">■</span> Improved profit margins	<b>69%</b>
<span style="color: #8b4513;">■</span> Market penetration	<b>61%</b>
<span style="color: #e67e22;">■</span> Product development	<b>43%</b>
<span style="color: #f1c40f;">■</span> Diversification	<b>41%</b>
<span style="color: #34495e;">■</span> Geographic expansion	<b>36%</b>

Participants could select more than one strategy.

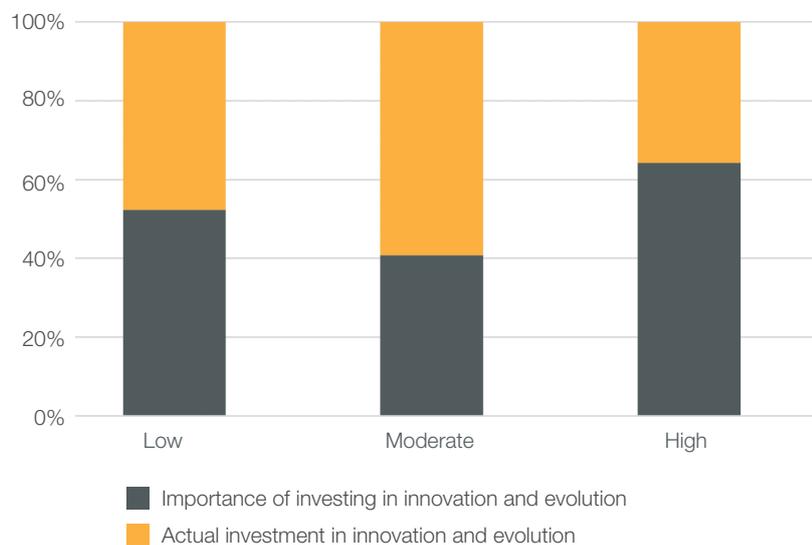
## A commitment to innovation

Like organisations across most industries, wine businesses have had to adapt to the changed market conditions. The 'ability to innovate' was recognised by participants among the top three factors for success over the coming three years.

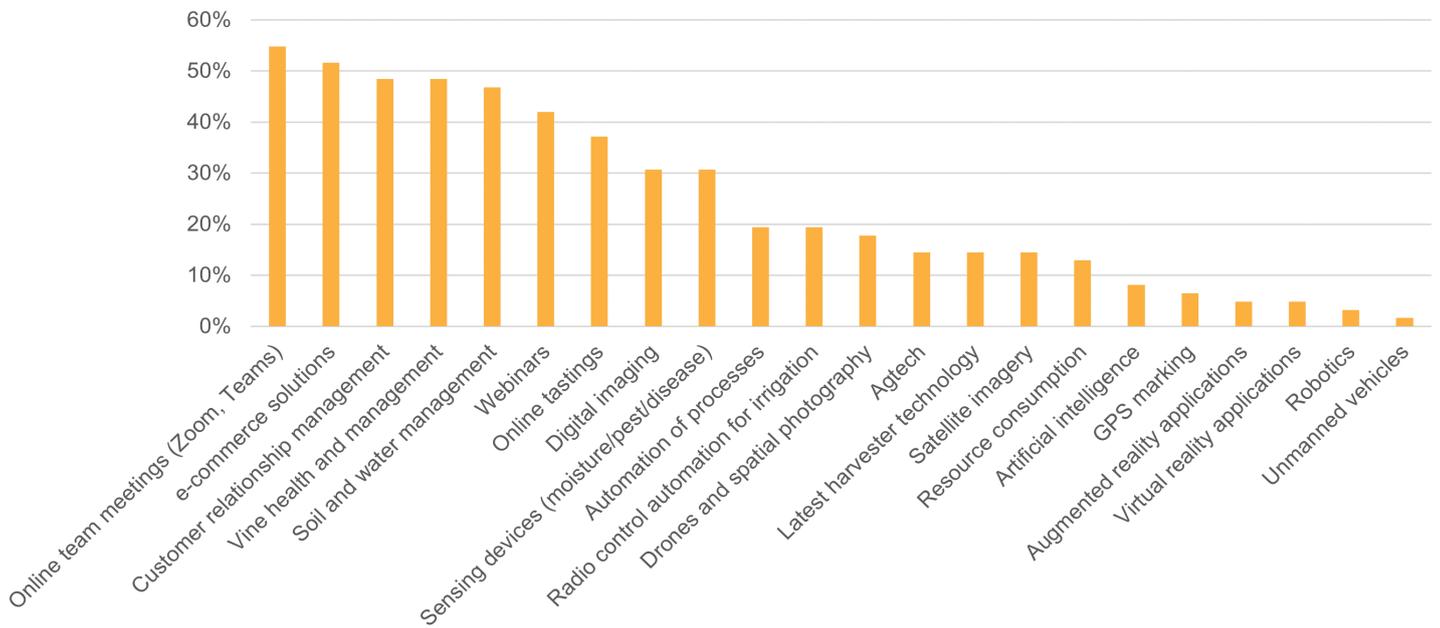
While many participants believed it was 'extremely important' for their business to embark on a phase of innovation and evolution, fewer were investing in innovation in a significant way.

Most of the participants have invested in innovation and evolution in a moderate way.

Only a small number of participants (5%) are currently not investing any funds in innovation and evolution.



## New technology



Technology adoption has played a key role in innovation across the wine industry over the last few decades, but never more so than today.

Adoption of technology by wine businesses has escalated allowing for effective communications, enhanced and safe client experiences, and operational management.

### High levels of new technology adoption

Consistent with other industry sectors, wine businesses have been embracing new technologies to continue to maintain effective operations and to build strong stakeholder relationships.

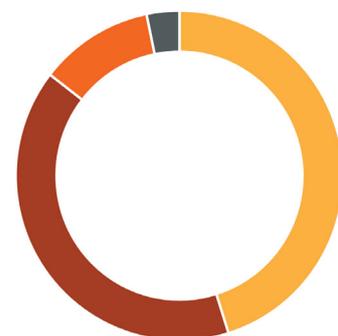
Over the past year, approximately half of the participants have implemented new technology solutions to conduct online team meetings (55%), introduce new e-commerce solutions (52%), enable enhanced customer relationship management (48%), host webinars (42%), and to deliver online tastings (37%).

Others have embraced technology to enhance their vineyard and operational performance, with technology focused on vine health and management (48%), soil and water management (47%), digital imaging (31%), and sensing devices (31%) among others.

While many of these technologies are now well established in the wine sector of South Australia, some early adopters among the participants have started to implement quite progressive technologies, including artificial intelligence (8%), augmented reality (5%) and virtual reality (5%) applications.

### Adoption may not be sustained

Despite significant investment in new technologies, less than half (45%) of the participants are confident that their technology adoption will be sustained post COVID-19, indicating a preference to continue to have face-to-face interactions rather than relying on technology for interactions such as teams meetings.



### How likely is it that these innovations will be sustained by your wine business post COVID-19?

Extremely likely	45%
Somewhat likely	41%
Not certain	11%
Extremely unlikely	3%

Increased focus on business continuity planning, and an improved ability to innovate, will help to fortify South Australia's wine industry as we continue to navigate through uncertain times.



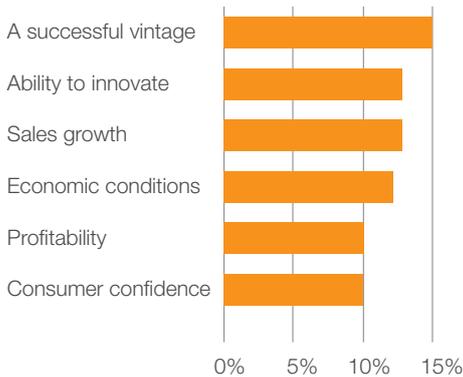
### Top 6 success factors

This year, for the first time, 'the ability to innovate' was included among the leading key success factors identified by participants.

Recent Australian research# suggests a business's ability to innovate has a direct correlation on sales performance and their ability to create sustainable growth.

While this has been an extraordinarily challenging year for our wine producers, it may also be an exciting one for the industry given the degree of innovation and advancements made across the wine supply chain.

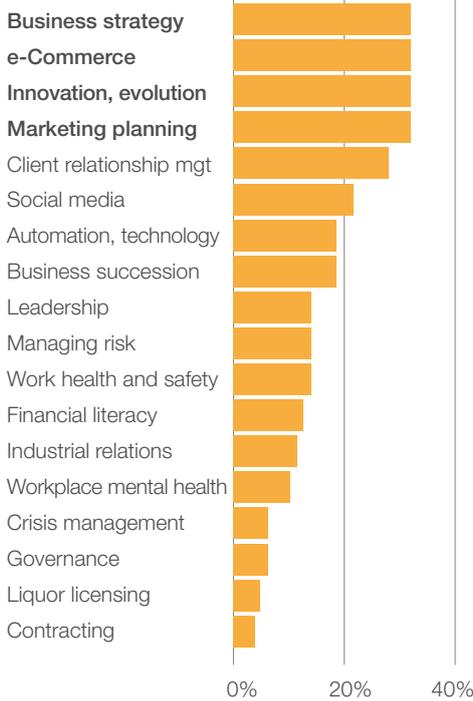
### What is likely to be your key success factor over the coming three years?



# Ref: <https://www.bandt.com.au/attitude-towards-innovation-can-make-break-successful-growth/>

### Professional development needs

Business strategy, e-Commerce, innovation and evolution, and marketing planning have all overtaken client relationship management and social media this year, as the most important areas for professional development and learning.

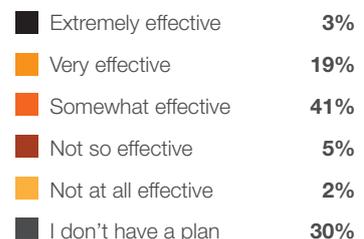


### Opportunity to improve resilience through effective planning

While 22% of this year's participants have effectively applied a business continuity plan to manage the events of the past 12 months, there appears to be significant scope to improve business resilience with far more robust planning and preparation. It is of some concern that 30% of participants do not have a continuity plan at all.



### Do you have a business continuity plan? If so, how effective was the plan in responding to the events of the past 12 months?



## Acknowledgements

The South Australian Wine Snapshot is an annual initiative, proudly presented by the South Australian Wine Industry Association in collaboration with the Bentleys Network.



### South Australian Wine Industry Association

From its beginnings in 1840, the South Australian Wine Industry Association (SAWIA) is the peak body representing the viticultural and wine making 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 leadership advice and support to South Australian grape and wine businesses, assisting them to prosper within a dynamic and diverse industry.

SAWIA has a strong track record as an industry leader and innovator in many areas. SAWIA proactively represents members and the greater wine industry with government and related agencies in a wide variety of aspects of business in the wine sector.

SAWIA has specialty services in government relations and advocacy, industrial and employee relations, work, health and safety, environment and consumer wine education.

### Bentleys SA/NT

Our advisory, accounting and audit services are strengthened by our expanding range of specialisations, which support the broad needs of individuals and enterprises at every stage of the business lifecycle.

With specialisations that include strategic business advisory, financial planning, tax consulting, R&D tax incentives, wealth management, and self-managed super funds, we work with a diverse range of businesses and individuals to help them achieve their goals and aspirations and get where they want to be.

Bentleys SA/NT is a proud member of the Bentleys Network - a network of independent advisory and accounting firms, located throughout Australia, New Zealand and China - and Allinial Global - an international association of consulting and accounting firms.

With our local expertise, national presence, and international capability, we can help your business prepare for tomorrow.

### Special acknowledgements

We would like to acknowledge the support of the Bentleys Network, and particularly Louise Vigar, for implementing, analysing and reporting on this research project.

We would also like to acknowledge the support of the South Australian Tourism Commission for supplying photos of local wine businesses for inclusion in this report, including:

- Cover, Kangaroo in vineyard, Limestone Coast, by John Montesi
- Page 6, couple in vineyard, Clare Valley, by South Australian Tourism Commission / Mike Annese
- Page 9, grape pickers in distance, Barossa, by South Australian Tourism Commission
- Page 11, couple in vineyard, Eyre Peninsula, by South Australian Tourism Commission
- Page 14, grape pickers walking, Fleurieu Peninsula, by Meaghan Coles
- Page 17, Coriole Vineyards, Fleurieu Peninsula, by Isaac Forman, Serio
- Page 18, man picking grapes, Fleurieu Peninsula, by d'Arenberg Winery.

## Available support

The teams of both the South Australian Wine Industry Association and Bentleys SA/NT are available to support the resilience, recovery and sustained growth of your business.

Please do not hesitate to contact our specialists for assistance.



**Brian Smedley**

Chief Executive

South Australian Wine Industry Association

[brian@winesa.asn.au](mailto:brian@winesa.asn.au)



**Henrik Wallgren**

Business Services Manager

South Australian Wine Industry Association

[henrik@winesa.asn.au](mailto:henrik@winesa.asn.au)



**Tim Siebert**

Partner, Business Advisory Services

Bentleys SA/NT

Specialisation: Financial literacy, financial reporting

[tsiebert@adel.bentleys.com.au](mailto:tsiebert@adel.bentleys.com.au)



**Michael Ruggiero**

Chairman of Partners

Bentleys SA/NT

Specialisations: Retail, e-Commerce, commercial property

[mruggiero@adel.bentleys.com.au](mailto:mruggiero@adel.bentleys.com.au)



**Mike Burfield**

Managing Director

Bentleys R&D Services

Specialisation: R&D Tax Incentives

[mburfield@bentleysrdi.com.au](mailto:mburfield@bentleysrdi.com.au)



**David Papa**

Partner, Risk & Advisory

Bentleys SA/NT

Specialisations: Governance, risk management, strategic advisory, business continuity planning

[dpapa@adel.bentleys.com.au](mailto:dpapa@adel.bentleys.com.au)

#### **Bentleys SA/NT**

Level 5, 63 Pirie Street, Adelaide  
South Australia 5000  
Telephone +61 8 8372 7900  
advice@adel.bentleys.com.au  
**bentleys.com.au**

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#### **South Australian Wine Industry Association (SAWIA)**

1st Floor Industry Offices, National Wine Centre  
Botanic Road, Adelaide South Australia 5000  
Telephone +61 8 8222 9277  
admin@winesa.asn.au  
**winesa.asn.au**

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 market opportunities.



➤ Advisors   ➤ Accountants   ➤ Auditors



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