

## **Submission to Quarantine and Biosecurity Review**

### **Introduction**

The Winemakers' Federation of Australia (WFA) is the peak national body representing wine enterprises of all sizes across Australia. Voluntary membership represents in excess of 95% of wine production in Australia. It develops policies and programs for the whole industry on a range of political, social, environmental, trade and technical issues with both a national and international dimension.

The Australian wine sector is a major contributor to the economic and social fabric of Australian life responsible for employing more than 60,000 Australians and fostering the prosperity of many regional communities. In several regions direct employment in grape growing and wine production constitutes more than 20% of total employment. When supported employment is included the contribution of the wine industry to these regions would be significantly higher.

The Australian wine sector is an Australian success story. In 2006-07 the value of domestic sales reached \$1.9 billion and the value of export sales \$3.0 billion. Furthermore, Australia is the third largest wine exporter in the world by value and the fourth largest wine exporter by volume.

The strong growth seen in the wine sector has been particularly important for regional communities in Australia. The number of wineries has more than doubled in 10 years, to exceed 2,100 in 2007. The vast majority of wineries are small and located in regional areas, and around 70% have an annual crush of less than 100 tonnes. This increase in wineries and growth of the sector has contributed significantly to regional employment, infrastructure and tourism.

Despite its success, the wine sector faces a number of challenges. Increasing competition from other beverages and imports, a continuation of drought conditions, retail consolidation with the trend to discounting and the impact of climate change, are all issues that the industry will need to overcome if it is to continue to maintain strong growth.

In May 2007, the Australian wine sector launched *Wine Australia: Directions to 2025*, an industry strategy for sustainable success. *Directions* was developed to reassess the priorities and challenges facing the industry.

*Directions* identified the potential for the Australian wine sector to sell an extra \$4 billion worth of wine over the next five years – lifting cumulative domestic and exports sales for the period to \$30 billion.

Effective research and development has been a critical element in the successful growth of Australia's wine industry over the last decade and the Australian wine industry has become a world leader in viticulture and oenology research.

### **The Australian Wine Sector**

In May 2007, the Australian wine sector launched *Wine Australia: Directions to 2025* as an industry strategy for sustainable success. Following a decade of unprecedented change in global wine trading conditions, *Directions* was developed to reassess the priorities and challenges facing the industry. It is founded on the firm conviction that Australia must become a more significant participant in the regionally

distinct and fine wine market, and its target is to increase the value of Australian wine trade over the next five years by a cumulative \$4 billion.

*Directions* recognised that Australia's wineries require more than a vision, and provides a series of practical tools and information which is currently being rolled out to industry through a series of national workshops under the *WineSkills* banner. These training modules have received the backing of the Australian Government through the Department of Agriculture, Fisheries and Forestry (DAFF).

Altered global trading conditions also bring new pressures and responsibilities to the environmental and social aspects of the sector. As the industry has expanded, so too has the policy and regulatory framework within which it operates. The Australian wine sector seeks to achieve positive environmental and social results for the industry, and the broader community as a whole, in a financially sustainable business environment. This can, and must be, achieved in partnership with the Australian Government through shared policy and program priorities.

#### **a. Background and importance to Australia**

Wine is an important industry in Australia, contributing significantly to a number of regional economies and directly employing some 28,000 people in both winemaking and grape growing (2006 Census), with further downstream employment in retail, wholesale, hospitality and tourism industries. The Australian wine industry is comprised of approximately 8,000 wine grape growers supplying over 2,000 wineries. In 2007, the total vineyard area reached almost 164,000 hectares. Wine grapes are grown in all states of Australia, with South Australia, New South Wales and Victoria accounting for the majority of production.

**Table 1: Snapshot of the Australian Wine Industry**

(2007 figures unless otherwise indicated)		
Wineries (2007)	number	2,299
Direct Employment (2006)		
Grape Growing	number	11,003
Wine Making	number	16,956
Wine Grape Crush	'000 tonnes	1,397
Wine Production	million litres	978.4
Domestic Sales - Volume	million litres	449
Domestic Sales - Value (2005/06)	\$A million	1,899
Exports - Volume	million litres	787.2
Exports - Value	\$A million	2,878.6
Imports - Volume	million litres	34.2
Imports - Value	\$A million	307

Sources: Australian and New Zealand Wine Industry Directory 2008 ABS and AWBC

The rapid expansion of wine production in Australia over the last decade combined with a small domestic market has seen the Australian industry become increasingly export oriented. Australia exports wine to 104 countries, and has an eight per cent volume share of global wine exports. In 2007 wine exports totalled a record 787 million litres with an estimated value of \$2.9 billion and accounted for around 10 per cent of Australia's agricultural exports. These wine export volumes currently represent almost 60 per cent of Australian wine sales and make Australia the world's fourth largest wine exporter. This is despite Australia's wine production accounting

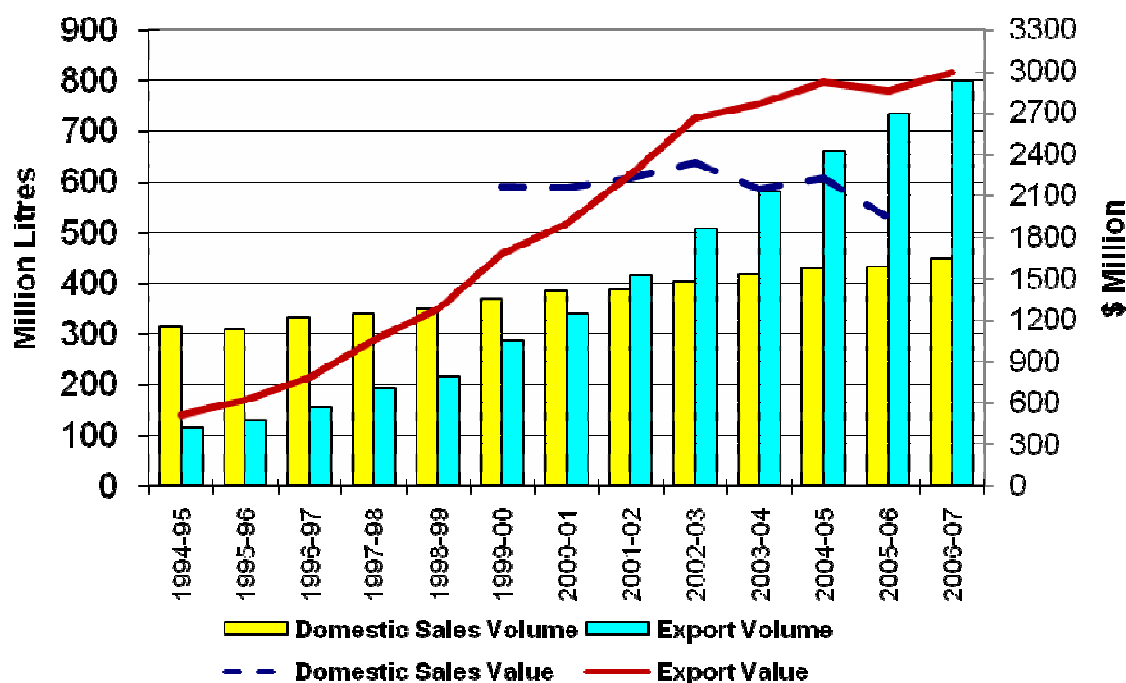
for only four per cent of total world production. Approximately half of Australia's wineries currently export to overseas markets.

Wine production and exports have also been expanding from other "new world" wine producing countries including: Argentina, Chile, South Africa, and the United States. This growth has led to global wine production expanding faster than demand and has resulted in a significant decline in world wine prices.<sup>1</sup> As a result, the profit margins for Australia's winemakers has declined in recent years, exacerbated by the increased number of competitors in the market as well as the capital intensive nature of the industry. Accordingly, the Australian wine industry is facing the challenge of maintaining profitability in a global market characterised by flat demand, increasing supply and declining prices.

### b. Rapid growth

Export volumes have increased five fold over the past decade, while the export value has almost quadrupled. Meanwhile, domestic sales of Australian wine have grown 35% by volume over the same period.

**Figure 1: Domestic Sales of Australian Wine and Wine Exports**



Note: Domestic Sales and Export Sales values are 2006-07 real prices Sources: ABS Catalogue No: 8504.0 Sales of Australian Wine & Brandy by Winemakers & Catalogue No: 1329.0 Australian Wine & Grape Industry, AWBC Wine Export Approval Report via WINEFACTS Statistics.

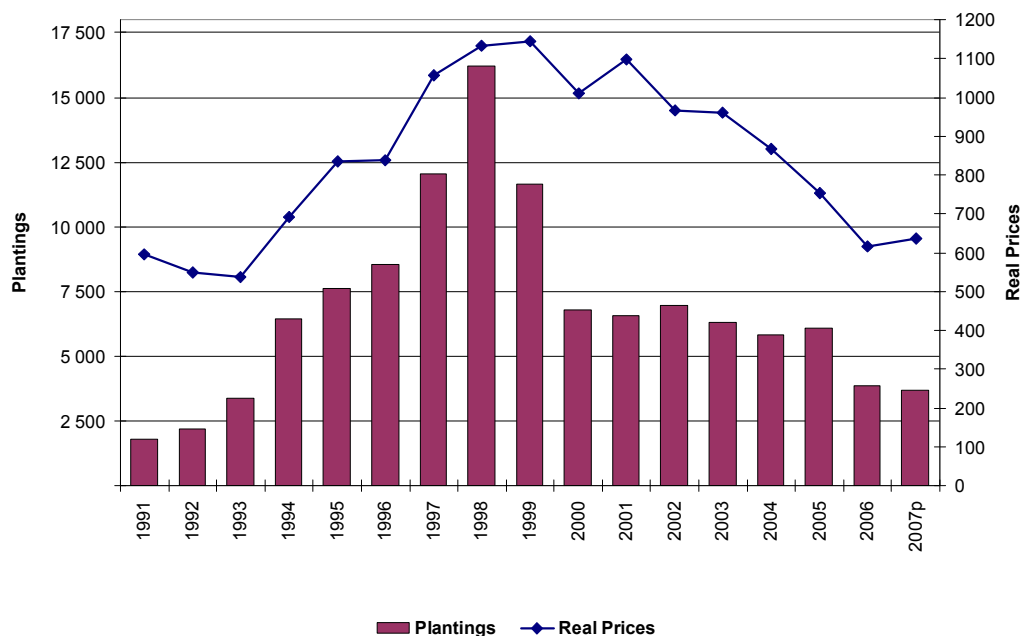
Much of the growth in Australian wine production was driven by the surge in plantings in the late 1990s, which was in turn stimulated by high grape prices. However it is important to note that a significant proportion of the new plantings were 'speculative', and not necessarily backed by a winery contract.

Between 1993 and 1999, real average grape prices more than doubled to almost \$1,120 per tonne. In reaction to this price growth, annual vineyard plantings increased from less than 3,000 hectares per year up to 1993, to almost 17,000ha in

<sup>1</sup> Sheales, T., Apted, S., Dickson, A., Kendall, R., and French, S. 2006, *Australian Wine Industry: Challenges for the Future*, ABARE Research Report 06.16, Canberra, October.

1998 – equivalent to 145 million litres (over 16 million cases) in additional annual wine capacity. Figure 2 demonstrates the close tracking of planting to winegrape prices.

**Figure 2: Real Grape Prices and Plantings**



Source: Australian Regional Winegrape Crush Survey via AWBC WINEFACTS Statistics & ABS Catalogue No: 1329.0 Australian Wine & Grape Industry. Note: 2007 Plantings and wine grape price preliminary

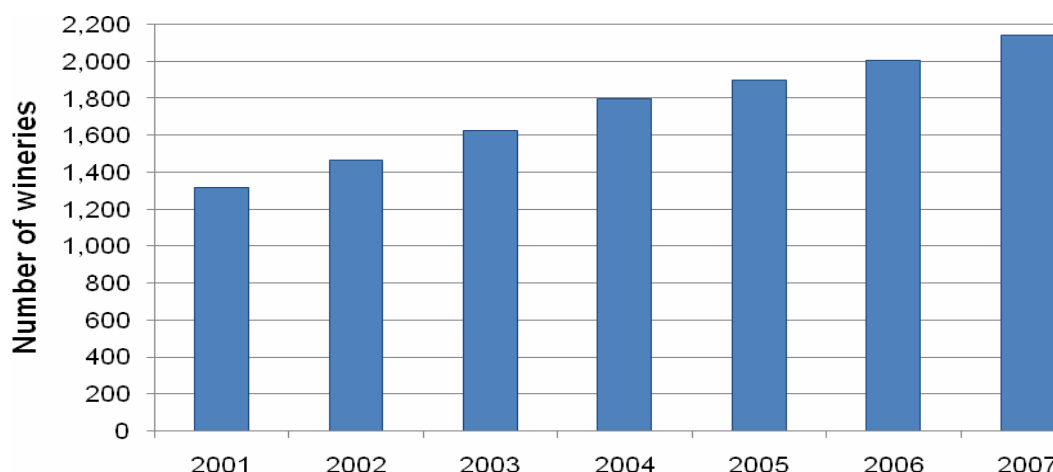
In hindsight, it becomes clear that the rapid vineyard plantings in the late 1990s were not sustainable, and nor were the high wine grape prices that prompted them. Grape prices have in fact progressively declined since their 1999 peak. Despite a slightly reduced crush in 2006, average grape prices were still slightly above those received prior to the planting boom (in real terms).

**c. Regional impacts**

The strong growth seen in the wine sector has been particularly important for regional communities in Australia. This is indicated by the following trends:

The number of wineries has more than doubled in 10 years, to exceed 2,100 in 2007. The vast majority of wineries are small and located in regional areas, and around 70% have an annual crush of less than 100 tonnes. In excess of 800 wineries have been added since 2000, and around 640 of these have been small, again with a crush of less than 100 tonnes. In contrast, Australia’s largest wine businesses crush more than 300,000 tonnes annually and the 5 largest accounted for 61% of the total crush in 2007.

**Figure 3: Growth in winery numbers - 2001- 2007**



Source: Winetitles – [www.winetitles.com.au](http://www.winetitles.com.au)

Employment in grape growing and wine manufacturing rose by 60% between 1991 and 1996, yet in the subsequent five year period to 2001, it doubled again, from almost 15,750 to over 30,100. Since 2001, overall employment has declined slightly to around 28,000.

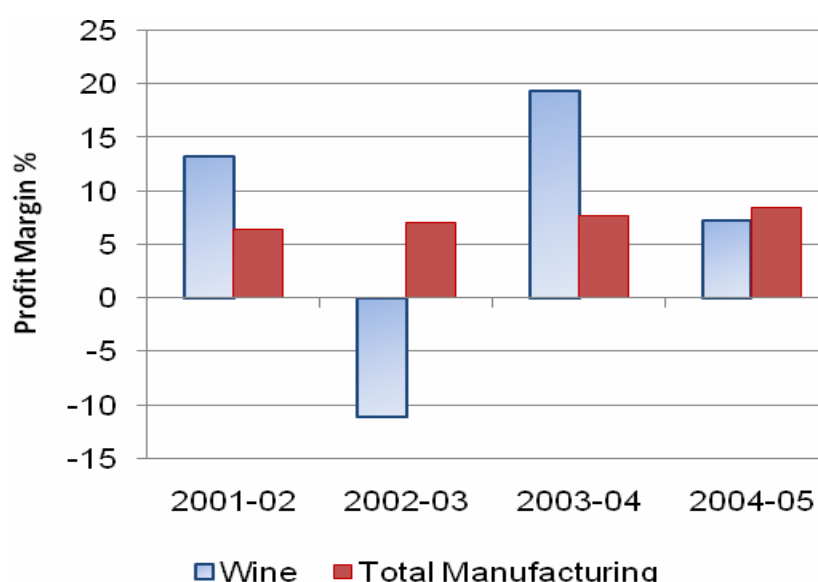
There has also been a strong rise in regional investment in infrastructure. Around \$1.8B was invested in new vineyard development in the 1990s and \$1.1B in the first 7 years of this decade. There was around \$1.6B of capital investment in winery infrastructure between 2001 and 2005.

Wine tourism has also seen healthy growth. Between 2000 and 2006, the number of domestic overnight wine visitors increased at an annual average rate of 6%, while domestic and international day visitors increased 5% and 8% respectively. In 2006 there were approximately 5.6 million international and local visitors to Australian wineries. During the June and September quarters of 2006, \$335M of wine was purchased, resulting in an estimated spend of \$666M by winery visitors in 2006. (Tourism Australia).

#### **d. Winery viability**

An indication of the profitability of Australian wineries is provided by the ABS Manufacturing Survey. Figure 4 shows that since 2001 the profit margin of wineries varied between -11% in 2002-03 and +19% in 2003-04. Over the same period the average profit margin for total manufacturing enterprises varied between 6.5% and 8.5%. Between 2003-04 and 2004-05 the profit margin for wineries declined 12.1 percentage points.

**Figure 4: Profit Margin (percentage) : 2001-02 to 2004-05**



Source: ABS Catalogue No: 8221.0 Manufacturing Industry 2001-02 to 2004-05

Note: Profit margin percentage = operating profit before tax as a percentage of sales and service income.

The Australian wine industry derives a further indication of the financial performance of wineries from the annual Deloitte Financial Benchmarking Survey.

The following table shows the proportion of loss making wineries, expressed as a proportion of respondents in the Deloitte survey, in each size category.

**Table 2: Proportion of Loss Making Wineries by Size Category, 2003 to 2006 (as a proportion of respondents in the Deloitte annual survey)**

Winery Size	2003	2004	2005	2006
\$0m-\$1m	40%	33.3%	12%	63%
\$1m-\$5m	52.9%	40.0%	32%	38%
\$5m-\$10m	16.7%	44.4%	23%	17%
\$10m-\$20m	37.5%	40.0%	38%	0%
\$20m+	22.2%	42.9%	25%	25%

Source: Deloitte Annual Financial Benchmarking Survey for the Australian Wine Industry

From table 2 it can be seen that in 2006, of those wineries in the \$0-1M category that participated in the Deloitte survey, 63% reported that they had recorded a loss.

Factors that have been driving this fall in margins and profitability include increasing domestic and international competition and the stronger Australian dollar. High and generally rising domestic taxation was also a major impost until the introduction of the Wine Equalisation Tax Federal Producer Rebate in 2004 which was extended in 2006, although further reform of wine tax is still a major issue. The capital intensive nature of the winery business, combined with strong production growth in recent years, has resulted in a high dependence on debt to fund growth, particularly for wineries whose revenue falls between \$1M and \$10M.

High gearing and lower margins, particularly when combined with poor cash flow, can have a crippling effect on business, with employment and investment plans shelved to

meet debt commitments. Unfortunately, these factors are likely to constrain future growth in the wine industry.

#### **e. Today's challenges**

The wine industry faces a number of interlinked challenges and issues that it will need to overcome, if it is to maintain strong growth and continue to increase the substantial contribution it makes to the Australian economy and society in general. These challenges and issues, as identified in *Wine Australia: Directions to 2025*, include:

- a structural imbalance between the cost of production and the price opportunity;
- grape and wine supply and demand fluctuations;
- retail consolidation driving downward pressure on pricing and margin;
- slow domestic growth and a tougher market for export growth;
- a resurgent Old World and better resourced New World competitors;
- greater environmental and sustainability challenges and responsibilities, particularly exacerbated by climate change;
- changing social concerns; and
- changing demographics and consumer expectations.

As the rapid plantings of the late 1990s came online in the five years leading up to 2006, the industry faced growing pressure from the challenges of oversupply. Prior to the 2007 vintage, the Australian wine sector was in a situation of significant surplus of grapes and wine, which in turn put significant downward pressure on prices.

The 2008 winegrape crush is estimated between 1.55 and 1.65 million tonnes, above the 2007 harvest of 1.397 million tonnes but still almost 13% lower than the 1.9 million tonne crush of 2006. As this follows a period of lower grape prices, many grape growers will experience further financial pressure. The wine industry will be moving from a surplus situation to one of balance or shortfall in the short-term as a result of these reduced tonnages. It is likely that a period of adjustment will occur and this may ultimately involve some producers (wineries and grape growers) exiting the industry. There is also a continued drive towards consolidation as companies try to achieve economies of scale, access key distribution channels and cut costs.

The global wine industry is becoming increasingly competitive. There has been strong production growth in the New World wine producing regions, including Argentina, California, Chile and South Africa. Meanwhile, Old World wine areas such as France and Italy are responding to such growth by improving marketing, adjusting production methods and making regulatory changes to increase their efficiency, supported by an annual budget of €1.3 billion. These trends have resulted in more intense competition, an oversupply of some wine varieties, and a consequent downward pressure on prices for wine.

Retail consolidation, the desire of retailers to reduce the number of suppliers they deal with and the growth of retailers' own-brands are causing difficulties for some winemakers. Small producers in particular are facing an increased challenge to find a route to market and maintain margins. Many are relying more heavily on cellar door, mail order and internet sales than their larger counterparts, with the smaller wineries (\$0M-\$10M) selling over 20% of their wine through these means, compared to just 7% for wineries with revenues in excess of \$10M (Deloitte Financial Benchmarking Survey 2006).

**Table 3: Distribution by cellar door, mail order or website by winery size**

Winery Size	Cellar door, Mail Order, Website
\$0m-\$1m	24%
\$1m-\$5m	19%
\$5m-\$10m	11%
\$10m-\$20m	7%
\$20m+	<1%

The strong appreciation of the Australian dollar has contributed to slower growth in export earnings, and has hurt international competitiveness. The export unit value for wine in real terms, fell from a peak of A\$5.61 per litre in 2000-01 to A\$3.86 per litre for the year ending March 2008, representing the sixth consecutive year that the average price for Australian wine has fallen.

Environmental issues also play a major role in the future of the wine industry. Security of access to, and the quality of, water supplies are major issues for all Australian rural-based industries. Reforms to the water supply industry may have a major impact on the future growth potential of the wine industry, particularly if access to water is restricted, or if the price of water rises substantially. Other environmental issues that the industry will have to tackle include: waste management and recycling, chemical use and disposal, biodiversity and energy use.

#### **The role of biosecurity**

The Australian wine market is a relatively mature market with increasing competition from other beverages and imports. Accordingly, Australian wine businesses target export markets as a key opportunity for growth.

In May 2007, the Australian wine sector launched *Wine Australia: Directions to 2025*, an industry strategy for sustainable success. *Directions* was developed to reassess the priorities and challenges facing the industry.

*Directions* identified the potential for the Australian wine sector to sell an extra \$4 billion worth of wine over the next five years – lifting cumulative domestic and exports sales for the period to \$30 billion. The gains will come through an increased emphasis on regional and fine wines, aimed at revenue increases through quality enhancements and positioning rather than volume growth.

With this increased opportunity in the global market comes increased risk.

The world is becoming progressively more globalised with international trade and tourism and growing movements of mail, cargo and machinery. These changes in the trading environment increase the potential for plant pests and disease to enter Australia.

Serious pests incursions can have a devastating impact on Australian agricultural industries, including the grape and wine industry. While it is inevitable that these pests incursions will continue to occur in the plant sector, via either natural means or human actions, the Australian wine sector needs to ensure that its response can deal with these situations when they arise.

The Australian wine sector is committed to playing a proactive role in the development of national plant health policy. The Federation is a member of the

National Vine Health Steering Committee (NVHSC), which was established in 1998. The NVHSC brings together industry, State Government and Commonwealth to determine and implement uniform national policies and programs on vine health. Other members of the NVHSC include the Wine Grape Growers Australia, all State Governments, the Australian Vine Improvement Authority, the Grape and Wine Research and Development Corporation and is chaired by the Chief Plant Protection Officer of the Department of Agriculture, Fisheries and Forestry.

In addition, the Federation is a signatory to the Emergency Plant Pest Response Agreement, a landmark funding agreement signed by the Federal, state and territory governments, to ensure timely and effective responses in the event of an emergency plant pest incursion.

### **Quarantine and Biosecurity Review**

Due to its isolation, Australia tends to enjoy superior health status of grape material to that in many other countries. However, as the world becomes progressively more globalised, the potential risk for plant pests and diseases to enter Australia increases.

The Australian wine sector recognises that it has an important role to play in Australia's quarantine and biosecurity policy. The industry also recognises that it must evolve if it is to address the new challenges that it faces as a result of increasing globalisation.

To maintain a sustainable and profitable grape and wine industry, the Australian wine sector has identified a number of strategies, including:

- Playing a proactive role in the development of national plant health policy;
- Identifying biosecurity threats and risks including assessments of pathways;
- Developing and implementing comprehensive risk management strategies to minimise the impact of pest incursions;
- Developing effective incursion response programs supported by a shared understanding of responsibilities, effective training and optimisation of available infrastructure and resources;
- Through Plant Health Australia, ensuring that the grape and wine industry's interests are represented in policy development at the national level to protect Australia's plant industries and related resources from the risk posed by organisms through the implementation of exclusion, eradication and control measures.

Quarantine and biosecurity are complex issues that require commitment of resources from all levels of government and industry. Whilst the Federation generally supports Australia's low risk / conservative approach to quarantine and biosecurity, it does consider that there are a number of areas where improvements, both by industry and governments, could be achieved, including:

- increased, regular and early communication with the grape industry, technical committees, experts and stakeholders;
- increased transparency, particularly in the setting of acceptable level of risk and the Import Risk Analysis scientific review process;
- increased (equivalent of that applied to exports) scrutiny of potential imports, including audits of certification programs etc;

- increased resources devoted to expertise development and retention within AQIS and BA and State Government departments;
- increased responsiveness to and acceptance of feedback and input from industry; and
- decreased out-sourcing of quarantine responsibilities to under-qualified entities. There are concerns associated with private quarantine-approved premises, their operations and lack of audit and qualification scrutiny.

Regular and early communication and engagement with industry is vital and whilst this has been addressed partly with the inclusion of grape industry representation on the Post-Entry Plant Industry Consultative Committee, and industry's membership of Plant Health Australia, improvements can be achieved in this area.

A commitment to share technical information and intelligence, engaging with other industries and entities that influence risk and the development of expertise would ensure that timeframes for responses (diagnostic, eradication decisions etc) and the implementation of biosecurity focused programs are not impeded by a lack of awareness, resources or qualified personnel.

The introduction of the Commonwealth Privacy Act placed limitations on the release of grape import information. As a consequence of this, industry has difficulty in identifying the quality and sources of in-coming inventory at the national level. As industry no longer has independently provided intelligence on pre-border threats and at-border incidences and activities and the frequency of interceptions, etc this can have biosecurity ramifications. Whilst AQIS does record some such information, this is not routinely made available to industry.

In addition, limitations placed on the release of import information have resulted in the grape industry having a reduced capacity to manage its variety and clone inventory, to identify consistently poor or risky sources of imported material and to learn from pest interception records. Coinciding with these limitations is the changing nature of importations. The sources of grape material today are generally not internationally-known, researched based improvement programs. Pre-border intelligence on most of these sources does not exist.

The issue of Quarantine Approved Premises (QAP) carrying out post-entry quarantine requirements is of concern to the Australian wine sector. Predominately these concerns are focused around the question of appropriately qualified staff and the existing AQIS audit process. Whilst there is merit to out-sourcing specific testing where a facility has superior equipment and expertise to that at AQIS quarantine premises, the industry considers that private QAPs are a threat to Australia's grape industry biosecurity.

### **Availability of high health status planting material**

The availability of high health status planting material and the maintenance of collections of planting material usually falls to the lot of vine improvement associations in Australia. Vine Improvement is a complex activity, involving and incorporating a wide range of organisations/associations, objectives and functions. These functions include varietal acquisition, quality assurance and distribution of new material from via the traditional nuclear and improvement collections to commercial nurseries and wine majors.

There have been a number of concerns raised about the state of vine improvement in Australia. Most of these concerns relate to the health status of collections, availability of clean planting material, concerns over availability of new varieties and rootstocks lack of coordination between vine improvement bodies.

A recent working group (which included WFA and WGGGA) provided the following recommendations to the South Australian government on this issue:

The WG **recommends** the following actions be taken to ensure the Australian Wine Industry is serviced by effective, efficient and technically sound national, state and regional vine improvement activities, coordination and performance:

1. The national vine improvement activities be overseen by an Australian Vine Improvement Management Authority (AVIMA):
  - With responsibility for establishing and monitoring standards, protocols, compliance and the provision of advice to policy and technical advice to industry and government;
  - Promoting the need for and benefits to the Australian wine industry from a technically rigorous national program.

Subject to decisions on the future role of the National Vine Health Steering Committee (NVHSC), AVIMA should have representation on the NVHSC.

2. The AVIMA:
  - Comprise 5-7 (Chair inclusive) competent persons selected for their collective skills (i.e. non representative) in the areas of:
    - Biosecurity/phytosanitary policy;
    - Accreditation/quality assurance experience;
    - International vine improvement knowledge/experience;
    - Business acumen/finance;
    - Governance/policy development.
    -
  - Recognise its “key stakeholders” comprise:
    - Winemakers’ Federation of Australia (WFA);
    - Wine Grape Growers’ Association (WGGGA);
    - Australian Dried Fruit Association (ADFA);
    - Australian Table Grape Association (ATGA);
    - Grape and Wine Research and Development Corporation (GWRDC);
    - Plant Health Australia (PHA);
    - Horticulture Australia Limited (HAL)
    - Phylloxera and Grape Industry Board of South Australia
  - Have key reporting responsibility to report/advise the key stakeholders;
  - Provide on an as need basis advice to other interest groups including:
    - Commonwealth and State Departments of Primary Industries.
3. AVIMA be supported by a Vine Improvement Technical Working Group (VITWG) with the principal objectives of:
  - Review/assess relevant collections (phytosanitary sense);

- Update contemporary science, literature, status of pathogens (update annually/biannually);
- Develop and advise on appropriate national vine improvement phytosanitary standards and protocols.

4. Phytosanitary Standards and Protocols incorporating the following:

- Standards setting/risk assessment;
- Testing protocols;
- Entry (to collections) standards and protocols;
- Exit (from collections) protocols;
- Data/material acquisition and management;
- Consideration of issues of varietal accreditation (with regard to health and nomenclature integrity status) and freedom to operate;
- Development of an effective varietal trade-marking and accreditation protocol for consideration by the industry;
- Communications and promotion to achieve effective appreciation of the need for the program and compliance.

(It is proposed that revised Standards and Protocols be developed from the current protocols, a number of reviews over recent years and the VITWG's proposed and ongoing science/literature review process)

5. The VITWG review and classify collections to be formally recognised and included in the National Vine Improvement Collections, including nuclear and G1 material. In particular:

- Document designated collections;
- Advise on nomenclature protocols to ensure ongoing confidence in varietal name integrity;
- Review existing collections in terms of what they have, health status and traceability;
- Validate market share source information tabled during the WG's deliberations.

6. The AVIMA/VITWG pursue the Foundation Collection include two fully tested and screened vines from quarantine for important varieties, from all sources.

7. The Australian Wine Industry secure funding to adequately support the proposed national Vine Improvement Program, particularly giving consideration to activation of biosecurity levy provisions via Plant Health Australia (PHA) and extension of the "user pays" policy for distributed material. Other funding sources should also be examined.

8. Industry establish a short term working group to cost the proposed arrangements, suggested at a "basic" and "ideal" level, and present to industry for consideration within a risk management context.

9. Industry adoption of high-health status planting material would be aided by quantitative economic and marketing data on its benefits to the Australian industry. The meeting suggested that the industry engage an appropriate agency (e.g. ABARE) to identify and quantify the losses from less than desired health status material and the benefits and impacts from a high health status industry.

10. The Australian Wine Industry seriously gives consideration to the identification and implementation of industry driven sanctions for non-compliance with the National Vine Improvement Program standards and protocols by any party.'

WFA has supported the establishment of a national coordination body for vine improvement and together with WGGGA, ATGA and ADFA is developing a costed proposal to fund those activities and the maintenance of the collections. This activity may need to be funded via the biosecurity levy (currently set at zero and based on grapes delivered to wineries for processing).

## **Conclusion**

National quarantine and biosecurity are complex issues that require the cooperation of all levels of government and industry. Australia enjoys world class quarantine and biosecurity system that has allows industry to maintain superior plant health to that in many other countries.

However, as the world becomes more globalised, the threat of serious pest and disease incursions in Australia increases. Governments and industry must respond to this changed environment to ensure that our agricultural industries are protected from the potential devastation of a serious incursion.

To this end, the Federation congratulates the Federal Government for initiating the Quarantine and Biosecurity Review and is pleased to participate in the review process.

The Federation is committed to working with all levels of Government in the development of science based policies to maintain a sustainable and profitable grape and wine industry.