drinks trade
your news, your views
February/March 2015 issue 45

ANZAC CENTENARY:
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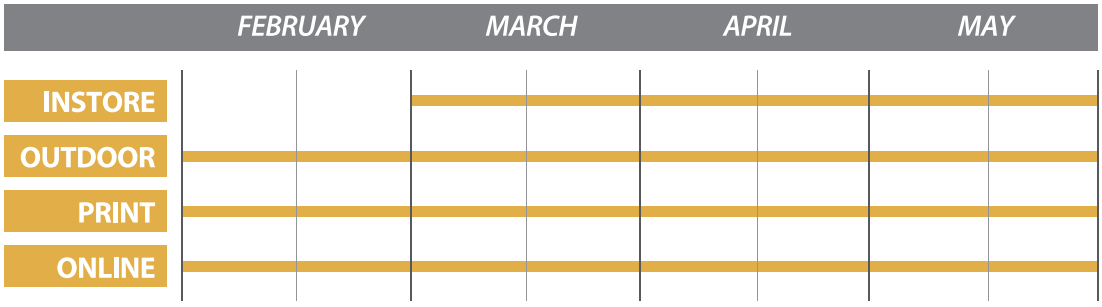

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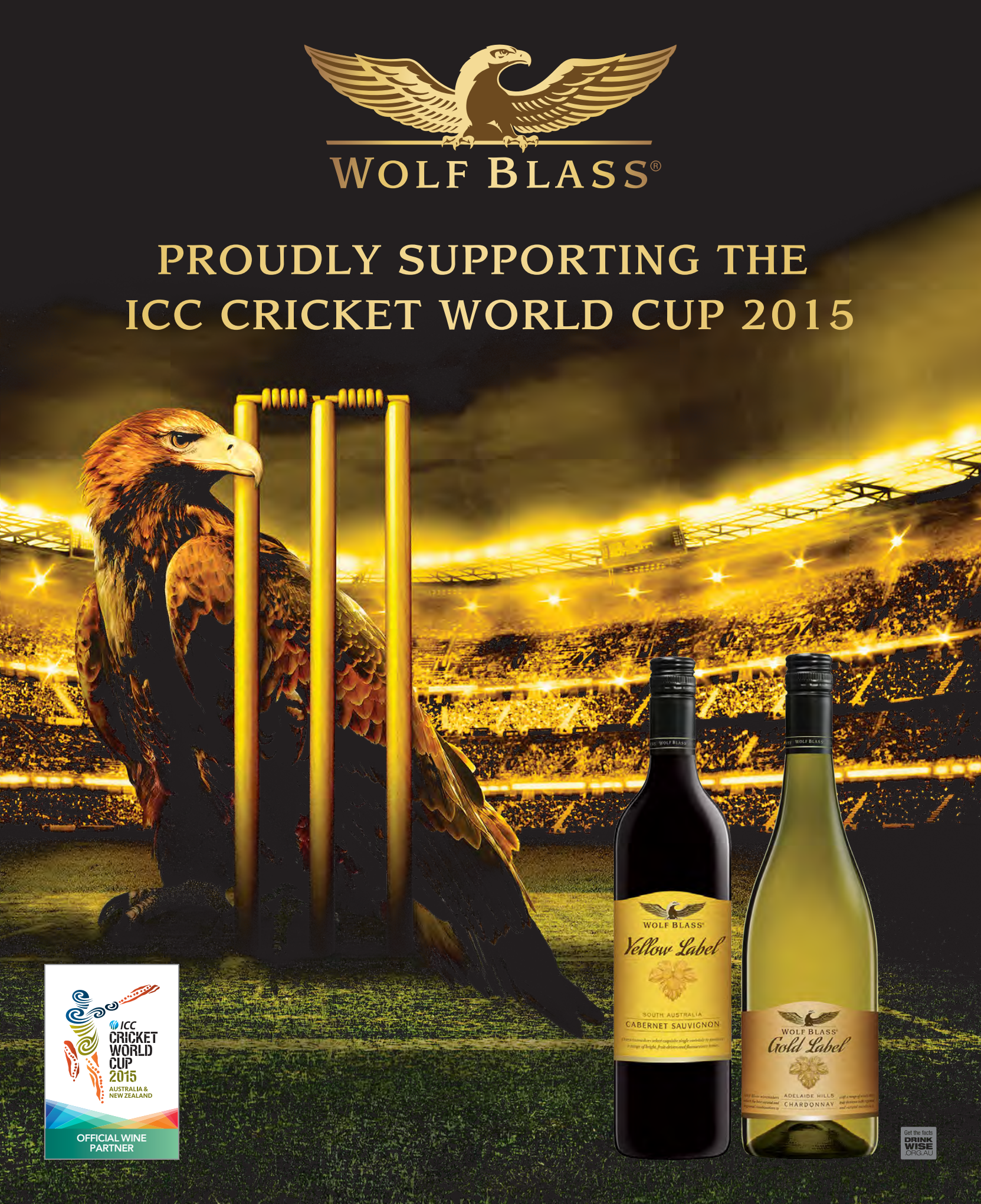
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Editor's Note

Welcome to the 45th edition of drinks trade and a new year of liquor retailing - both on- and off-premise.

The first edition of the year coincides with the last month of summer, the recent Australia Day honours list and the lead in to the Easter trading period. While Tony Abbott's awarding of honours this year wasn't altogether popular, the AHA NSW Vice President Kim Maloney received an Order of Australia medal that none would argue with, his work with 'Hotels Have Hearts' makes this award especially worth acknowledging.

AHA NSW President Scott Leah said: "his chairmanship of the Hotels Have Hearts committee alone has seen almost $3 million raised for the homeless in this city – and that is just one of the many charitable and community events Kim supports. This is an extremely well-deserved award and on behalf of the AHA NSW I offer congratulations to Kim and his family."

Mr Maloney, OAM, said it was an honour to receive the award. "I am humbled and honoured to receive this award, but, in reality, I accept this on behalf of the Hotels Have Hearts committee and the entire hotel industry".

In other developments, the drinks industry is poised to hear all the news behind Beam Suntory coming together; it was last summer that the news first broke and it has been a long path for all concerned to reach where we are today. Expect news in coming days and weeks, which we will endeavor to bring to you through our new online medium - *drinks* bulletin.

To check out the latest news with market insights I urge you to visit drinksbulletin.com.au and sign up to the news service. We will update the website daily, keep the weekly news wrap up and send out 'breaking news' stories direct to your inbox when the stories warrant it. So we promise not to bombard your inbox.

In this edition of *drinks* trade, we bring you comment from ALM's Scott Marshall, Coles' Greg Davis and Train my Venue's Dave Upson on the year ahead, while we also look back 100 years, in spirit of the ANZACs and the brands that have stood the test of time. Can you guess which brands the ANZACs would have been familiar with that we still know and love today?

We also have a cider and a RTD feature for you outlining the innovation and direction for these two categories, alongside a WA Wine feature, Cabernet and a Chardonnay Tasting Bench, and a profile on two of the great Australian wine families - the Burch family from WA and Jim Barry Wines from SA.

I hope you enjoy the read and don't forget to sign up to the *drinks* bulletin should you not already be receiving it.

Cheers

Ashley Pini
Publishing Editor – Hip Media

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Matt Kirkegaard is a Brisbane-based freelance beer writer who has developed a national reputation as an independent beer educator and advocate.

With over 35 years experience, Ray Jordan is one of Australia's leading wine writers. As well as releasing a guide to Western Australian wine annually, he hosts a regular wine radio program, is a television contributor and a frequent judge at both local and national wine shows.

Ken Gargett is a former lawyer, winner of the Vin de Champagne award (which he credits as being "a long time ago") and freelance wine writer. Ken is also a regular wine contributor to *drinks* weekly.

Ben Canaider is a mono-award winning drinks writer and lifestyle commentator. Ben has also written for television and is a regular contributor to radio. In between, Ben has also managed to write a number of award winning books.

Anna May is a Sydney-based writer, editor, eater and observer. Once an in-house features writer for Hip Media, Anna now spends her days crafting content and creating marketing strategy in her role as Communications Executive at The Urban List Sydney.

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February/March 2015

drinks trade INSIGHTS

FEATURES

REGULARS

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Highlight

Greg Davis SET TO UNVEIL PLANS FOR COLES LIQUOR AT MARCH NETWORK BREAKFAST

Greg Davis, Director of Liquor for Coles, will be addressing the drinks association's Network Breakfast in March.

Greg joined Coles in 2009 and played a leading role in the transformation of the fresh food business at the beginning of the company's turnaround. Greg now plans to take Coles Liquor to new levels of success, with a focus on driving value for customers.

***drinks* trade: What was your experience prior to working at Coles?**
Greg Davis: I've spent more than two decades in retail; working for a number of employers in liquor, fresh food and supply chain roles, before joining Coles at the start of the turnaround in 2009.

DT: You were promoted to Head of Liquor in 2014. What has your role involved so far?
GD: Over the last few months, I've spent time in our stores, meeting and talking to hundreds of customers, getting to know my team members, and the majority of our key suppliers.

I've restructured my team so that each of the Liquorland, First Choice and Vintage Cellars banners has its own dedicated management, and I've also started streamlining our supply chain by clearing out excess inventory.

At the same time, I've been putting together the road map for the next five years so we can get the business to where it needs to be.

DT: And what about 2015, what are your goals?
GD: We're focused on our customers, our teams and refreshing our store portfolio so we can build a solid foundation for future growth. We're closing underperforming stores, investing in value and trialing new store concepts to prepare for the next phase of the turnaround, which will see a total overhaul of the store network.

DT: You're talking at the drinks association's Network Breakfast in March. What kinds of topics can the industry expect to hear you talk about?
GD: The road ahead for Coles' liquor business, my own experience with over more than two decades in retail, and the challenges and opportunities facing the industry.

DT: What's the importance and relevance of those issues?
GD: Coles' supermarkets business has come a long way since the company was acquired by Wesfarmers in 2007 – profitability has more than doubled, prices are constantly falling and customers are happier every day. Unfortunately, the focus on the supermarkets meant that liquor didn't get the attention it needed and so it has failed to grow at the same pace. My job is to fix that.

The Network Breakfast where Greg will be talking is being held at Doltone House, Jones Bay Wharf, Sydney, on 25 March 2015. Tickets are still available and can be purchased at www.drinkscentral.com.au/drinksPayments

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NEWS

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FIRST FEMALE BROWN FAMILY MEMBER STEPS-UP INTO WINEMAKING

The first fourth generation and female Brown family member, Katherine Brown, is joining Brown Brothers' winemaking team for the coming vintage.

Leaving the Brown Brothers marketing team in Melbourne, Katherine will now join the team at Brown Brothers' Milawa Winery as Assistant Winemaker for the 2015 harvest period.

Katherine has a Masters of Oenology and Viticulture from Charles Sturt University, during which she gained cellar experience, and since, has worked vintages in Champagne, Bordeaux and Jura.

It has been a passion of Katherine's to pursue winemaking and the move will continue to ensure that winemaking at Brown Brothers remains within the family.

Katherine began her new role on January 19 in preparation ahead of the 2015 vintage; the harvest period for which is expected to be warm with optimal growing conditions.

NSW BIGGEST BEER MARKET FOR COOPERS

NSW is now the biggest-selling beer market in Australia for Coopers Brewery. For the last 153 years, South Australia has been the company's biggest state for sales, where Coopers Brewery is currently based.

Recent figures however, now show NSW accounting for 26.3 per cent of Coopers' total beer sales, in comparison to 24.8 per cent in SA for the financial year to date.

Coopers Managing Director, Tim Cooper, said NSW is likely to remain the brewery's largest state from now, attributing it to the larger population base, strong growth in keg beer volumes in Sydney inner-city pubs and the slow population growth in Coopers' home state.

As a result of the news, Coopers is considering setting up a large distribution site on the eastern seaboard to meet demand from the growing NSW market.

SCOTT MARSHALL

Scott Marshall sits at the head of Metcash's leading liquor wholesale business - Australian Liquor Marketers (ALM), managing distribution to over 14,500 hotels, liquor stores, restaurants and other licensed premises, as well as its specialist on-premise division.

Among this, ALM's key objective is to deliver a service that best supports its independent retailers by offering the most cost-efficient supply chain model possible and delivering strong marketing support and strong brands.

drinks trade: **Scott, what is trading like for independents at the moment?**

Scott Marshall: The independents that have a strong local offer are trading well, while some less organised independents are doing it tough in a market that is relatively flat for all. We all need to adjust to a changing consumer in both the on- and off-premise.

DT: Do you think independents' position in the market will change over the next few years?

SM: I think it will continue to be as it is today - good independents will trade strongly and compete with the larger chain operated venues.

DT: What do you think independents need to do in order to grow and strengthen their market share?

SM: I am on record as saying that independents need to consolidate and ensure their offer is consistent. We have a huge advantage over the chains and we need to utilise our locally owned strength to help us give our customers what they want.

There are many examples of independent stores growing against the chains. We also need to ensure suppliers have a viable network of retailers to work with and not just be used for short-term gains.

DT: How does ALM manage growing demand for factors such as diverse ranging and increased service speed?

SM: We work closely with suppliers to meet their changing requirements in range and also have our own research on the shopper trends, which helps us stay in touch. Our entire business is very shopper lead.

For more information about ALM and its services, visit www.almliquor.com.au

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ACCOLADE COMPLETES ACQUISITION OF GRANT BURGE WINES

Accolade Wines has completed its acquisition of Grant Burge Wines, including the Grant Burge brand, Burge and Rathbone Fine Wine Merchants business and Krondorf Winery.

Michael East, Accolade Wines General Manager Asia Pacific, said the company is pleased to now have a base in the Barossa.

"We have a major historical presence in McLaren Vale through Hardys, in WA through Houghton, in Margaret River through Brookland Valley, in the Clare Valley through Leasingham and Tasmania via Bay of Fires. Grant Burge and the Barossa were a natural next step."

Mr. East also said that Accolade has plans to grow the Grant Burge brand even further through its global distribution network, a decision Grant Burge was also pleased with, who will remain with the company as Brand Ambassador and will also be involved in continuing to supply premium Barossa Valley fruit to the business.

The companies announced in December that they had reached a conditional agreement for Accolade Wines to purchase Grant Burge. This news recognises the completion of the conditional agreement.

ANGUS BARNES NEW WCA NATIONAL CHAIRMAN


Angus Barnes

The Wine Communicators of Australia has appointed Angus Barnes, current Brand Communications and Heritage Director at Pernod Ricard Winemakers, as its new National Chairman.

WINE COMMUNICATORS OF AUSTRALIA
PROFESSIONALS WORKING IN WINE

Angus takes over from former Chair, Angie Bradbury. Angie will continue on the national board as Deputy Chair.

Mr. Barnes said he was incredibly happy to take on the new role and was quick to outline his priorities for the organisation shortly after the announcement.

Mr. Barnes' first priority is to refine the WCA strategy so that it continues to deliver value to its members and consolidate a solid association for the future, while he also plans to work with all the State Chapters to ensure open communication and alignment.

WCA is the national organisation for wine industry professionals, dedicated to innovation in communication about wine.

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MCWILLIAM'S WINES HANDS OVER VINEYARDS IN BID TO REDUCE BORROWINGS

McWilliam's Wines has completed a Sale and Leaseback initiative to reduce the company's debt.

The transaction has seen McWilliam's Wines sign two of its Coonawarra vineyards and three in Hanwood over to Belvino Investments, via long-term leases on all of the vineyards.

In addition, the Sale and Leaseback initiative will also see a capital investment into the Coonawarra vineyards, with the aim of improving long-term yields.

McWilliam's is pleased with the decision to take up the initiative and in addition to significantly reducing its borrowings, the company says it will also allow the company to focus on growing its brands and increase its domestic and export sales.

COCA-COLA ANNOUNCES SENIOR MANAGEMENT RESTRUCTURE

Coca-Cola Amatil (CCA) has announced that its Group CFO and Managing Director of SPC will be leaving the company in the next few months.

Both moves come as a result of a recent internal restructure to the company's senior management.

Ms. O'Sullivan, current Group CFO, will step down from her role after the February EGM, while Mr. Peter Kelly, Managing Director of SPC will finish later, at the end of March.

Upon announcement of the changes, CCA Chairman, Mr. David Gonski, paid tribute to both Ms. O'Sullivan and Mr. Kelly, and to their time with the company.

"The CCA Board has highly valued both Ms. O'Sullivan and Mr. Kelly for their professionalism, integrity and commitment to the success of the company. On behalf of the Board, I thank them and wish them well for the future."

CCA Group Managing Director, Ms. Watkins, says the company is expecting to announce new individuals for both roles in the near future.

Australian drinks Awards®

DO YOU HAVE WHAT IT TAKES? 2014 Supplier of the Year Brown-Forman and Brand of the Year XXXX Gold celebrate their win.

Welcome to the 2015 Australian drinks Awards!

...A **sparkling** event like no other.

This September heralds the arrival of the third annual Australian *drinks* Awards – the evening that celebrates and honours the fantastic achievements of our industry. With a record number of entries received last year, the bar is well and truly set for a glittering evening filled with all things glamorous. Get all the key info on the 2015 event here – and show us what you're made of!

SAVE THE DATE!

Wednesday, 2 September 2015 • Sydney Cricket Ground

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An initiative of the drinks association, the Australian *drinks* Awards, offers the drinks industry a robust and transparent method that you can use to measure your brand up against the rest of the industry. With data insight specialists Nielsen and The Advantage Group once again leading the judging process, there's no better way to showcase the goals your brand has been kicking over the last fifteen months to the wider drinks industry.

The date

Make a note in your diaries now - the third annual Australian *drinks* Awards will take place on Wednesday 2 September 2015. This year, we're rolling out the red carpet for a sparkling event that's guaranteed to add a dose of glitz and glamour to your social calendar!

The venue

We're thrilled to be hosting the third annual Australian *drinks* Awards at one of Sydney's premier venues – the Sydney Cricket Ground. From the heritage-listed Member's Pavilion to the brand new MA Noble and Don Bradman Stand, the Sydney Cricket Ground is unlike any other venue in Sydney, and is the perfect choice for the Australian *drinks* Awards.

How to enter

Entries opened to the industry on 2 February 2015, until 15 May 2015, via our brand new website – **www.australiandrinksawards.com.au** - the home of all-things Australian *drinks* Awards. It not only provides a platform to enter, but also houses essential information around the event including detailed information on the Selection Criteria, photos from previous events and all the latest news and updates. Brands that enter prior to 31 March 2015 will receive a special early-bird rate of $750 plus GST – and as a special bonus this year, we will be accepting entries and payments upfront, even if you don't have all the supporting materials ready. Once your entry has been secured, submissions may be provided separately on or before 15 May 2015.

Awards structure

A total of five product category awards (Beer, Cider, RTD, Spirits and Wine) are broken down into 13 sub-categories. The best performing brands across each of the five award types within each sub-category will be awarded a "Best in Class". For this year, Cider and RTDs will be awarded on total category level only. All Best in Class winners will become the finalists for the Category awards for their respective award type. Winners of each award within each category will be the winners of the 2015 Australian *drinks* Awards.

The Major Awards will be announced and presented across all categories:

Most Loved Brand
Best Presence in Social Media
Best Sales Achievement
Best Innovation
Best Ad Campaign

Two additional awards will also be assessed according to the overall best scoring brands (Brand of the Year) and the results of the annual drinks Annual Trade Survey (Supplier of the Year).

Submission and judging process

There are three stages to the awards submissions – Submission, Shortlisting and Consumer's Choice. This provides a broad spectrum of judging and voting, where all entries are assessed both by professional judges and a consumer panel. This ensures a complete and well-rounded selection process occurs and all winners are fairly selected.

The awards night

With over 500 guests in attendance at the 2014 awards night, we're excited to see what 2015 brings. We are already working closely with experienced events management company Veritas, to ensure the 2015 event is as memorable as previous years – and we're sure that with Andrew Daddo as MC once again, it's set to be another fantastic evening for all. "I'm really excited to be part of the Australian *drinks* Awards again", Andrew said. "Now in its third year, it's obvious to everyone who has been involved that these awards are the real deal. The opportunity to celebrate the best in the industry, with industry leaders is brilliant."

Andrew Daddo returns as MC at the 2015 Australian drinks Awards.

Tickets are available now; don't miss out and secure yours today! For more info, check out the insert in this edition of *drinks* trade, or visit **www.australiandrinksawards.com.au**.

What Does EASTER Mean for Your Establishment?

Easter is of course an observance of traditional Christian faith, but in a more secular context, it is a four-day holiday period across Australia, enjoyed by people of various or no particular religious affiliation. By Dave Upson, Managing Director, Train My Venue (online hospitality and tourism training).

For some hospitality outlets the big question is – to trade or not to trade?

Some external factors that impact on this decision may be:

What state or local government regulations are there to determine your potential opening hours?

How do staff penalty rates affect your trading plan?

Some surveys demonstrate a dip in trade at Easter – do you have local historical trends to analyse?

So if you are opening, what's your strategy? Here are some prompts that may help you decide on a plan:

It is an inherently family focussed time, so why not increase your engagement with consumers with an Easter egg hunt, Sunday roast special, double chocolate Easter themed dessert, or maybe a chocolate based cocktail special.

Is there a major sporting event with enough local interest to warrant big screen coverage and associated marketing activities? For a few examples - it's round one for AFL, Autumn Horse Racing Carnivals in Melbourne and Sydney, the Brisbane to Gladstone Yacht Race, Tasmania's Three Peaks Race and the evergreen of Easter sporting events – the Stawell Gift.

Festivals, cultural and sporting events may be the key driver for trade in your area – what's happening in your backyard? Do your homework around your local area and try to build relationships with the associations or groups of key influence.

So we wish you and your team all the best for Easter and would love to hear what it means for your business www.trainmyvenue.com

NEW SPIRITS COMPANY LAUNCHES IN MELBOURNE

A new spirits agency, specialising in handcrafted artisan products, has launched in Melbourne.

Aptly named Artisan Handcrafted, the new agency is backed by Mark Rowe and his two sons Nathan and Leigh of Paramount Liquor.

Its portfolio is committed to marketing and bringing small-batch, unique and handcrafted spirits to the Australian market, and currently offers a range of rye whiskies, small-batch bourbon, rums from the Dominican Republic, premium vodkas, rare gins and tequilas, all sourced by the agency's Sales Director, Georgina Wright.

"We've always had a history of importing products and are strong in building brands, so we decided to do it ourselves. We have a love of handcrafted artisan spirits and marketing for small producers, and now we have the platform to do just that", Georgina commented.

Artisan Handcrafted's portfolio is available wholesale, through NILWA. Please contact Georgina at georgina@artisanhandcrafted.com.au for RRPs and more information.

NEW CHIEF SUPPLY OFFICER JOINS TWE

Treasury Wine Estates (TWE) has welcomed Bob Spooner as its new Chief Supply Officer, replacing Stuart McNab.

Previously, Mr. Spooner has worked in supply chain management and was most recently the CEO of the UK brand, Hovis.

Mr. Spooner will be located to Melbourne this month and will additionally spend time at TWE's wineries and production facilities locally and abroad.

TAYLORS WINES PAVES THE FUTURE WITH INNOVATIVE THERMAL LABEL

Taylors Wines has developed a new and innovative label that is able to tell its consumers when the wine has reached the correct temperature for consumption, paving the way for future thermal technology within the industry.

After discovering that the majority of Australian wine drinkers serve white wine straight from the fridge, and 1 in 5 even from the freezer, Taylors decided it was important to come up with a label that could tell the consumer when the temperature of the wine is right for consumption.

The temperature sensitive panel features on the back of the label, alongside a colour chart. Through the use of thermochromic ink, as the temperature of the wine changes, so does the panel, allowing consumers to compare the colour on the panel with the colour chart, which indicates when the wine is too warm or too cold, and when the wine is the ideal temperature for consumption – 6-8 degrees celsius for aromatic whites.

The new label is currently available on Taylors Estate Pinot Gris and Sauvignon Blanc wines.

For more information contact your Taylors Wines representative.

LOOK OUT FOR YOUR NEW LOOK *drinks* WEEKLY – *drinks* BULLETIN

Introducing *drinks* bulletin - an evolution of *drinks* weekly, the industry's leading digital publication.

Now delivering the most up-to-date news, releases and activity not just straight to your inbox, but also online.

From Friday 13, you can access the most up-to-date news 24/7 at **www.drinksbulletin.com.au**, while the new look bulletin will continue to deliver the biggest stories from the week to your inbox first thing every Friday.

THE DRINKS INDUSTRY SHOW

AUSTRALIA'S TRADE ONLY DRINKS SHOW

The Drinks Industry Show is an exciting **trade only** event, showcasing the best in wine, beer and spirits from around the globe.

The show will connect producers and distributers of alcoholic beverages with the right buyers within the industry; bartenders, sommeliers, restaurateurs and other hospitality professionals.

It will feature an interactive exhibition, taste testing, mixology demonstrations, educational seminars and networking functions.

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NEW ZEALAND WINERY SEEKS AUSTRALIAN DISTRIBUTOR

New Zealand wine brand, Ohau Wines, is looking to secure a distributor in Australia. While the wine brand is currently distributed across South East Asia, it is however, yet to enter the Australian market. Ohau Wines is recognised as the Top Imported White Wine in Korea, while it has also received Double Gold in Hong Kong at the China Wine and Spirits Awards.

Ohau Wines is located by the Tararua Ranges on the west coast of New Zealand. It is the only commercial vineyard in the region and is focused on producing New Zealand wines with a difference, in particular wines that are more aromatically expressive in style. Ohau Wines also believes in allowing the vineyards to express themselves, with a minimalist intervention approach to its winemaking.

Currently the winery's production stands at around 40-45 thousand 12-bottle cases each vintage. Sauvignon blanc sits at the core of the winery's production (80 per cent) and is renowned for being less acidic than most Marlborough SBs, while retaining the winery's infamous aromatic style. The winery also produces pinot gris (15 per cent), as well as boutique amounts of pinot noir and rosé.

Ohau's wines fall among three tiers. Its Woven Stone range offers value for money wines, while its Ohau Gravels and Ohau Gravels Selected Vines ranges offer premium and ultra-premium wines respectively. Each range has consistently received four stars and above from wine critics, including Sam Kim and Raymond Chan, along with numerous accolades domestically and internationally.

If you would like to know more about Ohau Wines and/or are interested in discussing distribution, contact Steve Maguiness, Director at Ohau Wines on 06 367 5051 or via steve@ohauwines.co.nz

NICK WATERMAN STANDS AS NEW CEO OF YALUMBA

Proprietor and current CEO of the Yalumba Wine Company, Robert Hill-Smith, will step down from the role on March 7, instead assuming the role of Chair. The news comes as a result of the announcement that current Chairman of the Yalumba Board of Directors, Mr. Barnes, is retiring.

Mr. Barnes has served the Board for 12 years, and has been a tremendous mentor and Chair during that time, Yalumba says.

Instead, Nick Waterman, current Chief Operating Officer (COO) of the company, has been announced as the new CEO, seeing Mr. Waterman also become a Director of the company.

Mr. Waterman joined Yalumba's distribution business Negociants Australia in 2002, working his way up to Executive Director of Strategy and Trading in 2009, before COO in 2014.

All changes will commence March 7 this year.

POSITIVE RETURNS FOR AUSTRALIA'S WINE EXPORTS

The Australian Grape and Wine Authority's (AGWA) latest Wine Export Approval Report (December 2014) finds that Australian wine exports are up by 1.9 per cent in both volume and value.

This is the first increase to have been seen in export values since the global recession in 2007.

In total, the report finds that Australian wine was exported to 121 destinations in the 12 months, by 1,329 exporters; a significant increase from 893 exporters in 2013.

AGWA says the increase in volume was partially aided by the depreciating Australian dollar. However, the Spanish crush in 2013 put downward pressure on bulk wine prices, which continued to decline by 2 per cent to A$0.99 per litre. While bulk wine export volumes on the other hand, increased by 8 per cent.

NEW TRADING PARTNERSHIP GROWS DISTRIBUTION OF BLUE PYRENEES ESTATE

The Wine Company (TWC) has signed a new trading partnership with Blue Pyrenees Estate. The new partnership will see TWC appointed as the wine producer's eastern seaboard distributor from March 1 this year.

Both companies say the partnership will enable Blue Pyrenees to be marketed in a "uniformed manner" and to meet current demand.

The Blue Pyrenees site was established in 1963 and was among the modern Australian wine industry's first venture into cool climate viticulture. Blue Pyrenees is best known for its Midnight Cuvée, which was recognised as Australia's Finest Sparkling Wine at the Champagne and Sparkling World Championships in 2014.

Who will you raise a glass to?

In this Gallipoli centenary year, Victoria Bitter will again contribute $1M to the appeal.

Wherever you are, whatever you are drinking, stop and raise a glass in recognition and support of current and ex-Australian servicemen and women this April.

Show your support at raiseaglass.com.au

ANZAC CENTENARY

OUR DRINKS BRANDS A YEAR AGO AND 100 YEARS ON

One hundred years ago, with nearly a tenth of Australia's population at war, two drinks enlivened our servicemen more than any other: beer and rum. One other drink rectified them when conditions were often far worse – and life-threatening: brandy. This was a time when brewing was run on a widespread and very parochial basis, not just state-by-state, but even at a regional level.

It was also, in the immediate lead-up to the war, a time when interesting changes were occurring in the national beer palate. Yet the war's privations and the insular effect it had on our nation's worldview slowed down Australia's embrace of a wider and more inclusive food and drink culture. And perhaps because of that we have some of the alcohol brands of a century ago still going strong. By Ben Canaider

Firstly, beer. From a high point in the 1880s, the recessionary period of the 1890s took a toll on local breweries, and then in 1901 the Federation passed the Beer and Excise Act, which made any form of unregulated or unlicensed brewing illegal. (This wasn't repealed, by the way, until 1972 - one of Gough Whitlam's first acts as new Prime Minister…) By 1905, 16 out of Sydney's 21 breweries had closed. Within three years these had consolidated into two larger breweries: Tooths and Tooheys. The same thing was happening in Melbourne, where a plethora of breweries had been reduced to less than seven in 1907, five of which formed Carlton & United Breweries in that very year. Go back to 1871 and Victoria had 120 breweries, 20 of which were in Melbourne supplying the city's 1,120 pubs.

More than a handful of beers from this period have remained with us today, and it's perhaps because of both world wars that our beer landscape didn't change and became more international more quickly. One of the stalwarts is Fosters, released in 1887. Two brothers from New York - Ralph and William Foster - started the Foster Brewing Company in Melbourne. Thanks to new refrigeration developments it was Australia's first commercial lager brewery - up until that time our beer had been nearly wholly ale. To avoid rapid spoilage (Foster's Lager needed to be kept cool), the brothers supplied ice - gratis - to any pub that sold their beer. This ate substantially into profits. Despite taking out First Prize at the Centennial Exhibition in 1888, the brothers had sold the brewery and left Melbourne six months later. Yet less than 20 years later, Foster's was one of the breweries to help form CUB, along with the Victoria and the Castlemaine breweries, among others.

By this time, lager was becoming much more widespread, thanks to continued advances in refrigeration mechanics. The sweet, warm and thick ales of the nineteenth century were giving way to cooler, lighter-bodied lagers that suited Australia's climate so much better. Other changes were less technical, but still mark a clear shift in beer's evolution - VB replaced cork stoppers with crown seals in 1907. And by this time Queenslanders had taken Victoria's XXX lager (yes, that's three Xs) as their own. The fourth X came in 1916 - its addition to the label suggesting that the beer was stronger

RAISE A *Glass*

Victoria Bitter has been associated with soldiers and veterans since as early as the 1900s. Today, the beer brand continues to show its support, each year raising funds and awareness for the welfare programs of the Returned Services League and Legacy through its Raise A Glass Appeal.

The appeal began in 2009, after an image of a group of soldiers serving in Egypt during WWII was found at the old Victoria Brewery. In the photo, the men stand by a VB symbol made from beer bottles, resounding the long-standing relationship VB has with Australia's soldiers and veterans. And so each year, VB calls on Australians to Raise A Glass and share together the stories and experiences of diggers, past and present.

To date, the appeal has raised almost $6 million, as each year VB donates $1 million to both causes, combined with donations from the public, and is one of the single biggest contributors to veteran welfare in Australia.

Donations can be made on the website at www.raiseaglass.com.au

than the old XXX version, as medieval monks used the mark "X" to indicate a beer's strength.

Also in Queensland, there was one juggernaut of alcohol production and necessity - Bundaberg Rum. It was producing 250,000 litres of rum a year by 1907 - the same year the distillery burnt down. Back in operation by 1914, such was the demand for Bundaberg rum that the Federal Government bought the total stock to supply troops abroad. (As had happened in the Boer War, and would happen again in WWII.) Bundy was transported and distributed in half, gallon or 2-gallon ceramic jars, known as SRD jars, which troops claimed stood for Seldom Reaches Destination or Soon Runs Dry. It in fact refers to the Supply Reserve Depot in Deptford, Kent...

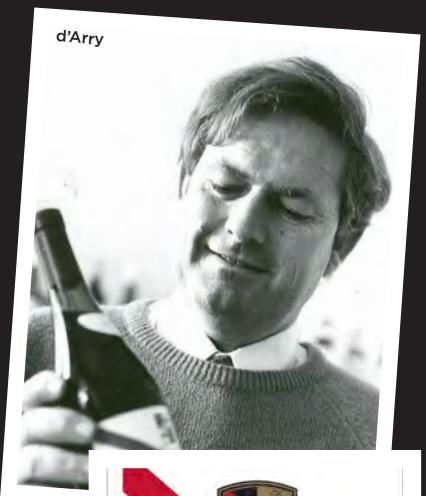
With regard to wine during WWI, its domestic consumption was genteel, but exports to England in 1885 were already at 150,000 litres per annum. Fortified wines and brandy were in wider use locally, such as Château Tanunda (established in 1890) and Angove's (1886). Such brandies would have been all too familiar with so many servicemen hospitalised. For some, no doubt, it was their last drink. Wine brands so widespread today, such as Penfolds (established in 1844), Seppelt (1865), d'Arenberg (1912) and McWilliam's (1916), were more widespread after Federation too, thanks to abandonment of state border levies.

One hundred years on it is still those two classic Australian alcohol brands that link the servicemen and women of today with their comrades of WWI – Bundaberg Rum and Fosters Lager.

Both have been refined over that time, but neither has lost their everyman's touch. And as many Australian's contemplate 1915 this year, perhaps over one or two of the above mentioned extant beverages, they will no doubt remember that a century ago Australian soldiers were entrenched in a world war that, by its sobering completion, would see 218,000 Australians killed or wounded.

D'ARENBERG

100 Years On



In 1912, Joseph Osborn sold his stable of prize-winning racehorses to purchase the Milton Vineyards in McLaren Vale. He worked the land and lovingly grew the vineyard's plantings until his son, Francis 'Frank' Ernest Osborn, left medical school to work alongside his father. Over the years, Frank increased the size of the vineyard further and sold fruit to local wineries, until he joined the AIF in 1915. Whilst serving overseas, his family continued to plant vines and upon his return, Frank renovated and extended the original d'Arenberg homestead looking across the Vale to St Vincent's Gulf. Joseph Osborn died on 25 May 1921, leaving full control of the business to Frank.

Frank married Helena d'Arenberg in 1920, and had three children - Antoinette, Rowen and d'Arry. Helena sadly died shortly after giving birth to d'Arry. A year after Helena's death, Frank was encouraged by friends and family to build a winery and produce wine as a way of getting his life back on track. The first vintage in 1928 produced a heavy red table and fortified wine. Production increased to supply the Empire, but was disrupted at the beginning of WWII, until d'Arry, like his father, returned from school at the age of 16 to help run the business, and eventually assumed full management in 1957.

In 1959, d'Arry decided to launch his own label named after his mother. He had always envisaged including a stripe on his label, inspired by happy memories of his school days at Prince Alfred College, where he wore the crimson-and-white striped school tie.

Today, d'Arenberg is one of the most significant wineries in McLaren Vale and in 2004, d'Arry was awarded a Medal of the Order of Australia in the Queen's Birthday Honours for his contributions to the wine industry and to the region. d'Arry has produced more than 65 consecutive vintages and d'Arenberg now proudly boasts a portfolio of award winning wines, commonly known as the 'Red Stripe' brand, after the red striped adorned by its label.


HOW TO SPOT AN
ICON
d'Arenberg
ESTABLISHED 1912
McLAREN VALE
The Dead Arm
SHIRAZ
IT'S GOT A STRIPE.
d'Arenberg
Fads come, fads go. Icons live on. Representing the best of McLaren Vale and everything our family has striven to achieve over 100 years and four generations, they're easy to spot with that famous red stripe.
THE d'ARENBERG ICON RANGE
DARENBERG.COM.AU
ESTD.
1912
ENJOY RESPONSIBLY
@DARENBERGWINE

Jack-of-all-Trades to Leading Wine Entrepreneur

WHAT NEXT IN THE YEALANDS STORY?

There was a time when Peter, founder of Yealands Family Wines, was, to quote, "not really a wine drinker at all". Things have changed for Yealands quite considerable however, and today his business is the sixth largest wine producer in New Zealand.

Prior to his venture in viticulture and winemaking, Yealands was a jack-of-all-trades, and had worked in many different fields, including transportation, gold mining, mussel and deer farming, among many others.

In 1998, when supplying aggregates for a large concrete firm on the edge of Blenheim, Yealands noticed a 50-acre property for sale. Yealands made an offer, and after managing to negotiate on the asking price, Yealands found himself the owner of a piece of land that would begin his career in the wine industry.

"I had bought this land and had to decide what I was going to do with it. At that point in Marlborough there was viticultural development going on in Rapaura, which is what they now call the Golden Mile, because it has the most prestigious vineyards", Yealands begins as he sat down with *drinks* trade during a recent visit to Australia. Yealands has recently returned from a business trip to the States and is briefly here before jetting to Auckland. We're meeting with Yealands to find out what his trip to America was all about and what the trade can expect from the brand in 2015.

"I had never been on a vineyard before and I didn't know anything about grapes, but everyone else was rushing around all excited about it, so I decided I would join the group."

No sooner than after Yealands had developed his vineyard and had it up and running, there was interest from buyers.

"I didn't sell it, but it got me excited about the industry. I was offered big money and I thought if I can do this here, then I can do this somewhere else."

Yealands' next venture was in the Upper Wairau Valley. While Yealands explains that the land was far from glamorous, it was economical and would be the only vineyard in

the area. The land turned out to be a success - the Wairau River, closely located, provided a draught that protected the grapes from frosts and eventually the land was sold to Matua.

Next, Yealands bought land at Seaview, where Yealands Family Wines is located today. In 2006, Yealands decided that he wanted to go a step further from just growing grapes and later that year he made arrangements to build a winery at Seaview, which opened on 08.08.2008.

At the opening of the winery, Yealands set himself three targets to be achieved within just five years from then.

"I wanted to be in the top handful of New Zealand producers; I wanted us to produce the best sauvignon blanc in the world; and I wanted us to be recognised as the most sustainable and innovative winery and vineyard in the world."

In that time and over only seven vintages, the business has achieved all three targets and has received significant awards across its portfolio of wines, most significantly for its sauvignon blanc, and is the first ever winery to have been carboNZero certified since its foundation. Last year alone, Yealands Family Wines was named Overall Large Business winner at the Fairfax Sustainable 60 Awards and overall winner at the 2014 NZI National Sustainable Business Network Awards.

Since 2008, Yealands Family Wines has installed the largest solar panel array in New Zealand, three wind turbines and a solar hot water system; these are only a few of the initiatives the business has implemented in its commitment to becoming the world's most sustainable winegrower. The winery also produces all of its hot water from its own resources – mainly vine prunings – a global first, and is continuously looking for ways to reduce its carbon footprint in its bottling production.

"I think it is important for all businesses to make themselves sustainable. We need to start looking at what we give back, otherwise we'll be in serious trouble", Yealands explained.

"Viticultural operations and wineries in New Zealand are meeting the target when it comes to sustainability criteria. I think there's only about five per cent that aren't. For me, that's a great achievement."

"I do think the sustainability targets are a little bit too easy to get though - I think they could be toughened up and I believe we lead the field there, and I hope that we encourage others to do the same, similar, or even better."

Yealands proves the extent to which wine production can be achieved sustainably - the business having shown that quality is not compromised by its sustainable practices, having produced some of the most award-winning wines. Additionally, while reducing its impact on the environment, Yealands Family Wines is also testament to the benefits sustainable practices have in reducing operating costs.

Sustainability credentials are becoming increasingly valuable to today's consumers. Not only are consumers making purchasing decisions based on minimising their own footprint, adopting and promoting sustainable practices is also seen as a point of difference.

But of course, Yealands is not alone in achieving such success, and he is the first to point out that he has a fantastic team behind him, headed by Chief Winemaker, Tamara Washington, who Peter describes as the "highlight" of his team. Tamara has been with Yealands Family Wines since the outset and together in a team of five, has grown a strong portfolio of wines for the business.

In keeping with Yealands' opening goals, a strong focus is placed on its sauvignon blanc to ensure it leads in its category. Yealands' sauvignon blancs are the most awarded, and most recently, were awarded World's Best Sauvignon at the 2012 International Wine Challenge (Yealands Estate Sauvignon Blanc Single Block S1 2011 vintage (RRP $35)) and the Regional Trophy at the Decanter World Wine Awards (Peter Yealands Sauvignon Blanc 2013), while the Land Made Sauvignon Blanc was awarded Trophy at the New Zealand International Wine Competition 2013.

Pinot Gris is also a very strong varietal for Yealands and its Land Made Series Pinot Gris has taken out the Trophy for Best Value Dry White Table Wine for two consecutive years at the Sydney International Wine Competition in 2014.

"We've set ourselves a benchmark now that we can uphold to. It's the fastest growing brand in NZ in its category and it's the most sold wine in Marlborough, which is great – you've always got to do well in your home town and country before you can do good overseas."

What Can You Expect from Yealands Family Wines in 2015?

At the time of interview, Yealands had been informed that Yealands Family Wines was soon to be named Producer of the Year at the London International Wine Competition. "We're literally on a role", Yealands commented.

It's no wonder that with such success the business is now looking to expand its portfolio. "We're constantly reviewing our portfolio and have launched a lovely aromatic blend called P.G.R. – it's a blend of pinot gris and riesling, plus there's a little bit of gewurztraminer in there. P.G.R has gone extremely well in the UK and we will launch it in New Zealand in February, and then Australia."

Yealands also announced that the Peter Yealands brand has recently been secured exclusively into Dan Murphy's, this being the first introduction of this range to the Australian market, including the Peter Yealands 2014 Sauvignon Blanc ($13.99), Peter Yealands 2014 Pinot Gris ($13.99) and Peter Yealands 2013 Pinot Noir ($17.99). These labels will be available nationally through the off-premise chain.

Globally, Yealands Family Wines has recently expanded into America and at the time of interview, Peter had just returned from two weeks there, supporting the launch of Peter Yealands and Yealands Estate.

Palm Bay International has been appointed as exclusive U.S. importer for Yealands Family Wines in the market. "Our companies share much in common - a passion for quality product, strong family ideals and a shared approach towards long term growth," said Yealands. They have already had fantastic success in getting the brand in a few short months into approximately 30 states with more coming on board each week.

"It's been an incredible journey and it's not over yet. We've got a long way to go on just holding our position and going even further."

P.G.R has been tested in Australia with a small soft launch so far and will be launched properly with the 2015 vintage. The wine will retail at $26.00.

Contact Yealands Family Wines for more details and keep an eye out for the new format ***drinks*** **bulletin** on the arrival of the new label.

Report into Australia's Changing Drinking Habits:
THE FACTS ABOUT AUSTRALIA'S ALCOHOL USAGE

This January, the Australian Liquor Stores Association released its report on Australia's changing drinking habits. Having analysed a wide range of sources, including Federal Government Statistics (ABS & AIHW), NSW Government (BOCSAR) information, and State and Federal Government Licensing data, the report finds both "risky" drinking and alcohol-related violence far less prevalent than what was previously thought.

Below, we provide a snapshot of the report, but if you would like to preview the complete findings, the report is free to download at www.alsa.com.au/alsacontent/research-analysis

KEY FINDINGS

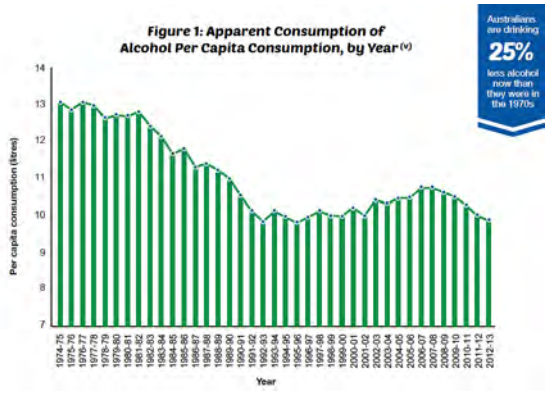
Alcohol consumption has declined by 25 per cent since the 1970s. In 1974-1975, Australians consumed the equivalent of 13.1 litres per person. This has fallen considerably since the early 80s, decreasing to 9.9 litres in the most recently reported year of 2012-13.

More teenagers under the legal drinking age are abstaining from drinking alcohol. Almost three-quarters of all minors drink no alcohol at all. Over the past six years there has been a statistically significant increase in alcohol abstention, with the percentage of young people abstaining increasing from 56 per cent in 2007 to 72 per cent in 2013.

Alcohol-related violence is decreasing. Encouragingly, alcohol related assaults in NSW have decreased by 30 per cent in the last six years.

An increase in packaged liquor licences has not led to an increase in alcohol consumption. Alcohol consumption per capita has declined over the same period that packaged liquor licences have been increasing. What this means is that consumption is falling when there is a significantly greater footprint of liquor store outlets in Australia.

Alcohol Consumption Has Declined



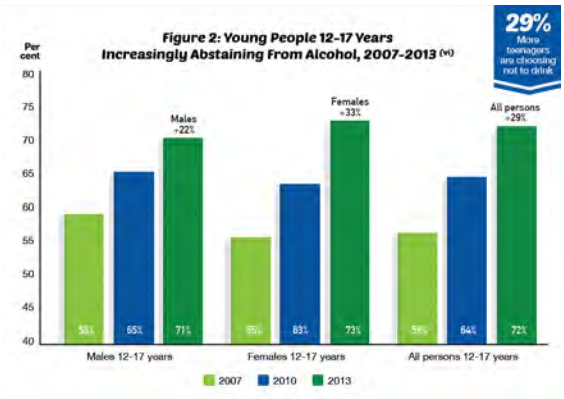
Community perceptions around Australia's binge drinking habits have been rife over the past few years. Anti-alcohol lobbyists consistently fail to use evidence to back up their claims. Rigorous research and Australian Government data reveals that despite concerns that binge drinking is increasing nationally, there is no evidence to support this assumption.

Australia's alcohol consumption is at rates not seen since the early 1990s.

The introduction of random breath testing in 1982, behavioural changes due to increased awareness around health and social risks, in addition to national education campaigns such as DrinkWise Australia's safer drinking cultural change advertisements, have all contributed to the declining trend in per capita alcohol consumption.

The majority of Australians consume alcohol responsibly and enjoy the social benefits it brings. It is important to distinguish between the moderate consumption of alcohol by the overwhelming majority of Australians and the misuse of it by a small minority.

More Teenagers Are Abstaining from Underage Drinking



Since 2007, there has been a 29 per cent increase in abstention for all young people aged 12-17 years.

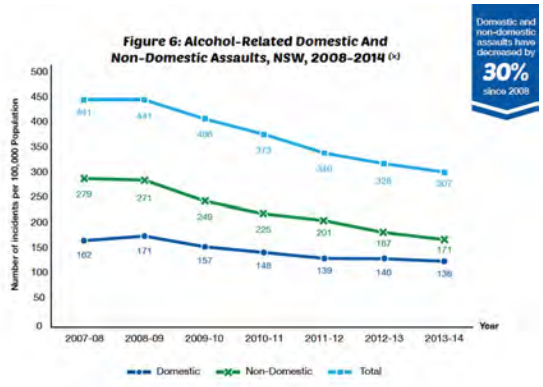
The increase has been most marked for girls, with a 33 per cent increase in abstention, compared with a 22 per cent rise for boys.

These results have come at a time when industry and government have worked to significantly increase youth education campaigns about alcohol in Australia.

Educating school age children is vital to ensure teenagers are well armed with knowledge about the dangers of alcohol abuse.

The results strongly indicate that responsible drinking education campaigns are working, with fewer young people drinking to risky levels and more young people choosing to abstain from alcohol.

Alcohol-Related Violence is Decreasing



While any alcohol-related violence is unacceptable, encouragingly and contrary to popular belief, alcohol-related incidents in NSW have decreased by 30 per cent in the last six years. And contrary to public opinion, alcohol related assaults in public places have been falling dramatically.

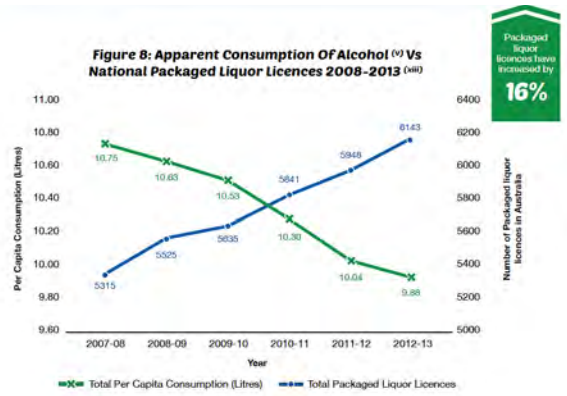
Since 2008, there has been a 39 per cent fall in public, or non-domestic assaults, along with a 16 per cent fall in assaults within the home (domestic).

Combined, this means there has been a 30 per cent reduction in all alcohol related assaults in NSW.

These are encouraging trends, supported by effective cultural change campaigns to create greater awareness of violent behaviour in our society and targeted penalties for those who do offend. These include campaigns aimed at saying no to violence in communities; promoting responsible drinking; and government policies that focus on penalising the unacceptable behaviours of the individual (e.g. the recent increase in penalties for offenders in Victoria, coward punch laws in NSW, and the NT Alcohol Mandatory Treatment program).

This trend is also supported by Australia wide data from the Australian Institute of Health and Welfare (AIHW), which shows a decrease in violence (such as physical, verbal and being put-in-fear) across a similar timeframe.

Alcohol-Related Violence Is Not Correlated with the Increase in Packaged Liquor Licences



While the number of packaged liquor licences have increased, alcohol consumption hasn't. In fact, alcohol consumption per capita has declined over the same period that liquor licences, including destination stores such as Dan Murphy's and First Choice Liquor, have increased. Consumers have benefited from increased competition and choice, while overall consumption has continued to decline.

The facts are that Australia has 16 per cent more packaged liquor licences now than in 2008, while over the same time period, alcohol-related violence has declined; more people are drinking responsibly; and more young people are abstaining. Clearly there is no correlation between outlet density and alcohol-related harms in the community.

ALSA AUSTRALIAN LIQUOR STORES ASSOCIATION

ALSA is the national representative body for all off-licence retail liquor stores across Australia. For more information visit www.alsa.com.au/alsa or alternatively you can contact ALSA at info@alsa.com.au or on **02 8335 3250**.

4 PINES CITRUS IPA

Distributed by: 4 Pines Brewing Company
RRP: $9

4 Pines Brewing Company has released its latest small batch release, Citrus IPA, which joins the brewery's Keller Door limited-edition range.
Citrus IPA is 7% ABV, produced after the surprising popularity of its 8% Imperial India Brown Ale. The release has been timed and produced with summer in mind, encompassing seasonal flavours and aromas, while its label depicts a Dr. Seuss like illustration, reminiscent of childhood memories of summer holidays.
Tasting notes: On the nose, aromas are full bodied and hop-driven, with notes of fresh bloody orange, grapefruit and lime. While the palate has been created to "hit you in the face" like summer, with an aggressive bitterness and a slight mouth-puckering zestiness.

QUAYLE SUMMER ALE

Distributed by: Lord Nelson Brewery
RRP: $7.50 (on-premise)
$9 (off-premise)

Tasting notes: 4.4% ABV. A seasonal summer ale, made from 100 per cent natural ingredients, with no added sugars or preservatives. Brewed with European malts and lighter hops. Bright in appearance with clean yeast and character, and strong carbonation for added freshness.

LIMITED EDITION QUIET DEEDS WHITE IPA

Distributed by: Red Island Group
RRP: $22 per six-pack

A limited edition brew from Quiet Deeds, pointing to a change in direction for the brewery, which plans to produce more unique, small batch brews in 2015. Also the first product from Quiet Deeds in can format.
For those who enjoy the technicalities – Quiet Deeds White IPA mixes the hop-character of India Pale Ale, with the wheat base and spice of Belgian Wit Beer. Hops include Cascade, Centennial and Mosaic, while malts used were BB Pale, JW Wheat and Rolled Oats.
Tasting notes:
Refreshing and well-balanced, with fruit hop aromas. Crisp bitterness on the fore of the palate, which blends with yeast derived flavours of orange peel, coriander and spice. Subtle banana flavour on the mid-palate and a biscuity mouthfeel. Citrus tones on the finish, as well as a clean and dry bitterness.

MAGNERS REVEALS NEW DESIGN IN TIME FOR ST. PATRICK'S DAY

Magners will be celebrating St. Patrick's Day with the release of new packaging across its Magners Apple and Pear ciders.
The brand hopes that the new packaging will help increase the brand's visibility on shelf, while the increased fruit visuals and traditional green colours incorporated in the new design will reinforce the brand's Irish heritage.
The new packaging will feature across its entire range of both Apple and Pear 330ml bottle ($12.99 per four-pack), 440ml can ($29.99 per eight-pack), 568ml pint bottle ($6.99 each) and also on tap.
In addition, the brand is also releasing a new Magners pint glass for the on-premise. The new glass is designed to suit both draught and over-ice variants of Magners and to bring to life the cider vat icon featured on the new design across all its other formats.
Magners will also be Australianising St. Patrick's Day in 200 pubs across the country with a 'St. Paddy's G'Day' theming kit for each pub, which includes the iconic green hat with corks, helping to keep the flies away over the extra-long weekend celebrations (14th-17th March).
Magners is distributed by Bacardi Lion in Australia.

NEW

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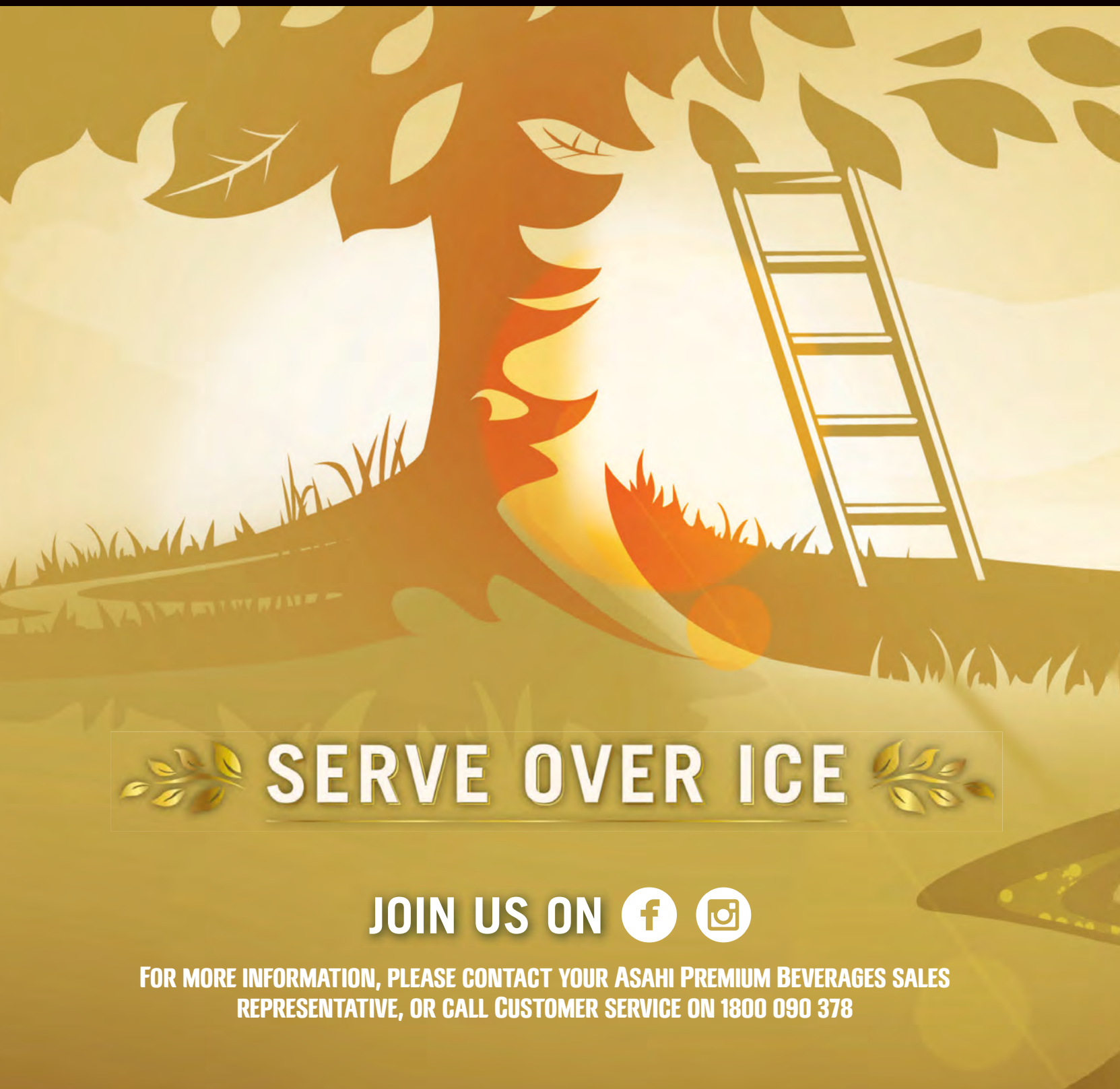

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CIDER

FOR AUSTRALIA, THE ANSWER'S QUALITY

There is no avoiding cider these days. If craft beer can be described as having "exploded", I am not sure what superlative can be reached for to describe the even more spectacular growth of the cider market.

It can be hard to measure the size of the market, but industry figures put the cider market at roughly four per cent of the total alcohol market, doubling since 2008. The biggest element of the change hasn't been in growth in existing brands, it has been the explosion of brands and styles that now occupy the shelves and bars.

Where half a generation ago cider was the last choice of the impoverished university student, cider has become the discerning choice of a new generation looking for a beverage that isn't as bitter as beer or as sweet as an alcopop. For all of the positivity that comes with growth though, cider also faces the problems faced by rapid growth. Chief amongst them is consumer knowledge and product differentiation.

By Matt Kirkegaard

Steve Dorman, one of the partners in South Australian-based The Hills Cider Company, says that while the market has grown, ciders aren't just ciders.

"The United Kingdom's cider scene has been trending for ten years, over there it has been growing exponentially," Steve said.

"Australia is at somewhere like three-five years behind, but has exploded too."

"But people don't really distinguish between ciders; it's a very diverse category that covers everything from what are essentially RTDs, through to drinks made with Chinese concentrate, through to handcrafted natural cider," Steve says.

The Hills Cider Company is one of only a handful of Australian cider companies that has "complete land to hand control" over its product, in Steve's own words. The company recently celebrated its fifth birthday, recognising five years of rapid growth and growth of a portfolio of award winning ciders from a small base, and in a short amount of time.

What differentiates Hills Cider, is the fact that all its ciders are only produced from hand-picked Australian grown fruit. Not only does this mean the company has complete control over every stage of processing, allowing Hills Cider to experiment with new techniques and styles, but it also means they offer a substantially different product in comparison to a market saturated with ciders made from "imported Chinese juice, concentrate, artificial colours and sugars", Steve adds.

Similarly, Phoenix Beers, which does despite its name produce ciders, is committed to offering a portfolio that's "all about quality", Todd Barac, National Sales Manager at Phoenix Beers says. "Phoenix Beers has always been

about offering the world's best across our portfolio, and that mantra extends into our cider offerings as well. It is all about quality, and we are very fortunate to be able to represent some of the finest examples of style from around the world.

"There is definitely a growing demand for quality ciders in Australia, and we only expect that to increase as more and more people discover that the category has so much more to offer than the artificial, sugary ciders that currently hold the majority of market share in Australia. The trend is happening not just in cider, but in all consumables; people are looking for high quality products, that are less processed, better for them, and more delicious!"

In a diverse market with global traditions, there is a lot to educate drinkers about.

While it's something of a recent phenomenon, cider is an ancient drink – even more ancient than beer. The ability to turn grain starches into beer was a happy accident discovered around 8000 years ago. However, nature has been fermenting the sugars in fruits such as apples for a millennia - since yeast and fruit have coexisted.

The deliberate use of apples in cider making may even predate the cultivation of apples as a food crop. Unlike many plants, where offspring grown from seed retain many identifiable characteristics of its parents, an apple grown from seed is vastly different from its progenitors and is often too sour or bitter to be edible. Before humans learned to graft cuttings and thereby replicate edible varieties, using apples for cider by blending and fermenting a mix of apples, made otherwise inedible apples palatable and life sustaining.

While in Australia the cider industry mainly uses blends of sweeter table apples, traditional cider regions, such as Normandy and Spain, still blend cider apples to derive their signature styles.

As Dorman identifies, the Australian market is made up of a wide spread of styles and techniques, with few producers following the Hills path having dedicated orchards from which they draw their fruit.

"Still, it is important to have all of the players that currently exist in the market", Doman says. "Because it pulls people into the category."

"They come to the category, and after a summer of drinking cider, many start moving up the chain and making choices within the category with many

looking for 'real' ciders."

The rising tide lifting all boats is a phrase often applied to these situations, but the Hills boat seems to be proving the adage, with Steve talking of the business doubling year-on-year for the last few years.

It's a sentiment that Sam Reid, President of Cider Australia and co-owner of Tasmania's Willie Smith Organic Cider shares.

"The market has doubled since 2008 and products such as the flavoured ciders didn't exist then," he said. "They are a great recruiting tool for the category."

He draws a comparison with beers such as Stone & Wood's Pacific Ale, which he sees as a great entry beer, creating huge interest and drawing people to the category.

"The market is growing and it's a lot of the new players who are benefitting. The big old players will have seen volume growth, even if their market share has declined," Sam said.

However, as the market develops further, and consumer awareness grows, debate will continue to develop around some of the claims made in advertising and whether ciders made from imported concentrate can accurately be described along the lines of "made from fresh apples". And it may only be a matter of time before the ACCC applies a similar approach to that which it brought to Coles' claims of being 'fresh baked'.

As to the future, Dorman, Barac and Reid are excited about the innovation they are seeing.

Dorman has recently launched cider in cans, joining the one hottest trend in craft beer from last year.

"The product quality of cider in cans is amazing," he said.

"Aside from cans being lighter and environmentally friendly, they look after the cider so well."

"It really protects the fresh fruits character of natural ciders", Dorman says, though adds - ciders will always taste best when they are poured into a nice glass.

While Barac believes "as palates mature, there will be an awakening to traditional produced ciders and a slow but steady movement away from more artificial options."

"I don't think there is a magic bullet in unlocking the traditional cider category in the short-term. As mentioned before, it's an education process - it begins at a grass roots level, which is where we focus our attention, and it will gather its own strength organically", Barac adds. "Quality production speaks for itself."

For Reid, the future holds a shotgun scatter of innovations. In addition to oak barrel-aging and Australian cider makers using traditional cider apples, he also points to hybrids such as Hills' hop infused cider, and its appeal for beer drinkers.

What Does the UK Have to Say about *Cider*?

By John Logue, Global Customer Marketing Manager - Rekorderlig Cider

When the 'Magners effect' (serving packaged cider over ice pioneered by Irish cider brand Magners) re-invigorated the UK market back in the late '90s, nobody envisaged, that 20 years later in 2015, the category would still be growing.

Today the most recent UK data from CGA shows the cider category still in value growth and worth over £2.8 billion - over $5 billion!

The growth in the UK is still being driven by premium brands as the consumer continues to invest in brands with equity and authenticity. Along with the premium trend in purchases, the UK consumer is still very much in love with flavoured cider - a category in double-digit growth. In the UK on trade, over half of all cider consumed is now flavoured.

The UK is very much seen as the leader in global cider as it is arguably the oldest market in this most recent cider renaissance, but more importantly it is by far the largest.

At Rekorderlig Cider, we have always been passionate about being innovative and modern. Both in the UK and across the world, there is an abundance of riches when it comes to artisan or traditional styled ciders. The combination of traditionalists, as well as the modern entrants to the market, offer the consumer a diverse and exciting category to explore and we are thrilled to be a leader in the later group.

Cider has very much become part of consumer's repertoires over the last 12-18 months in Australia and consumers are continually being drawn into the category through new flavours, as well as the introduction of bigger pack formats in the apple and pear categories.

At Rekorderlig Cider, we concentrate on continuing to offer consumers a premium choice that extends consumption occasions and alongside the development of our latest flavour Pomegranate, we have also looked to utilise our fantastic brand equity into the growing apple and pear market.

Firstly, we have looked to recruit more male consumers into the category with the 330ml 'from the bottle' occasion launch of our exciting Rekorderlig Dry Äpple. This cider was designed to be a drier addition to our flavour range, but that still retains the classic premium Rekorderlig taste. We feel it is the slightly higher tempo version of our more relaxed flavours.

To further develop the phenomenal multipack can growth and add value to the consumer and retailer, we will be introducing something a little different with an influence of our European heritage in March…so watch this space!

I'm often asked if the Australian market will follow the UK one in terms of growth trends and consumer habits, and while we are seeing some of the same trends develop around the world, including the de-seasonalisation of cider, there are however, nuances within every market, and Australia is no different.

The UK and Australia consumer shopping and consumption behaviours can be different as they shop in different licensed environments and climates, however, they do also have many things in common. Most notably is that they both love quality products, they both love brands, and most importantly, they both love great tasting ciders.

As a global brand, we are able to look across all our markets and react quickly to the changing habits of our consumers, but more importantly we can share the great innovation and fantastic history we have as a brand.

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MARLBOROUGH VODKA LANDS ON AUSTRALIAN SHORES

Distributed by: Divas Beverages
RRP: $38

New Zealand vodka brand, M Vodka, is now available to the Australian market.

Tasting notes: A bold and intense super-premium vodka, made with pure artesian mineral water from the Blue Mountain Ranges of Marlborough, as well as pure column distilled alcohol.

ANGOSTURA RUM NO.1

Distributed by: island2island Beverage Company
RRP: $75

Angostura Rum No.1 is now available nationwide to both the on- and off-premise. The release comprises of only 9,600 bottles and sits in Angostura's new limited-edition premium range aged in special casks, aptly named The Cask Collection. The new release was recently named Rum of the Year for 2014 by the Rum Journal Awards.

Tasting notes: 40% ABV. Smooth and well-rounded. Vanilla, caramel and oak spice on the nose. Flavours of caramel, molasses and sugar with some spice and woody notes.

WKD IRON BREW

Distributed by: Suntory Australia
RRP: $25 per six-pack (330ml/can)

The global bestseller and top 10 ready-to-drink (RTD) in Australia, WKD Iron Brew, is now available in can format for summer, to both the on- and off-trade, from Suntory Australia. The new format is available in a 330ml can six-pack for convenience.
WKD Iron Brew and WKD Vodka Blue are also both currently available in the 275ml glass bottle format.

Tasting notes: A light pre-mixed sparkling drink, combining the renowned soft drink Iron Brew and vodka.

DEVIL'S CUT & COLA 9%

Jim Beam is set to launch Devil's Cut & Cola 9% RTD this month. This will be the only premium brand offering in the super high ABV.
Beam Suntory Australia has released the new product after seeing the phenomenal growth the super high ABV segment of Dark RTDs is currently experiencing, and believes the new product will open up a new segment of dark spirit drinkers.
Devil's Cut 9% is available in a convenient 250ml can, making it 1.8 standard drinks per serve.
The flavour profile incorporates the well-rounded vanilla flavours and dry finish that the original Devil's Cut 6.66% RTD offers, while the new 9% formulation delivers a unique balance of strength and flavour not seen before.
Since its launch in 2013, the Devil's Cut brand has experienced quick growth and is now the seventh ranked Bourbon RTD with an ABV of 6%+ in Australia.
Through 2015, Beam Suntory will be supporting the brand with BTL investment across on- and off-premises in Australia, and ATL with the release of its new TV campaign starring Jim Beam Global Brand Ambassador, Mila Kunis. Both will promote the unique strength and flavour of the Jim Beam trademark, which is unrivalled in its category.
Devil's Cut & Cola 9% will be available from 12 February, retailing for $22.99 per 4-pack of 250ml cans.

ABSOLUT VODKA ANNOUNCES INNOVATIVE POS MARKETING INITIATIVE WITH SODASTREAM

Absolut Vodka has partnered with SodaStream to drive an in-store gift with purchase promotion, which aims to attract the alcohol segment and target the growing market for at home, customisable drinks.
The promotion will run across a number of Pernod Ricard's independent channels, where consumers who spend $50 or over on a participating product will be eligible to redeem a SodaStream Play Drinks Maker valued at $99.00 (plus $9.95 postage and handling).
The promotion is additionally being supported by in-store sampling activities and cross-branded collateral, as well as eight consumer-minded recipes, which combine the Absolut range and SodaStream.

DOUBLE JACK

6.9% ALC/VOL

BOLD IN TASTE
SMOOTH IN FLAVOUR

Perfectly mixed, in an RTD 4-pack, with its more pronounced taste Double Jack is perfect for Jack Daniel's lovers. Not to mention that the high ABV category has almost 20% of the RTD market share and the Super Premium Bourbon RTD segment is growing at 14% versus a year ago.*

*Source: Australia Liquor weighted, Aztec Jan 2015.

DOUBLE JACK

375 mL 6.9% ALC/VOL

JACK & JACK & COLA

NEVER HAVE TOO MUCH OF A GOOD THING - ENJOY RESPONSIBLY

RTD: zero% sugar

READY TO DOMINATE

It would appear RTDs are designed to target the most specific of consumers, giving Australian drinkers a plethora of convenient, inexpensive and targeted options to enjoy a drink. So why is the category experiencing such a decline? Aztec data indicates a 4.6 per cent decline in RTD sales in 2014, continuing on from a 6.9 per cent decline in 2013.
By **Anna May**

It is no secret that RTD sales have steadily decreased since the increased taxation in 2008, but spirits companies are facing the challenge head-on with an array of innovative products and ideas to turn the category on its head. A Diageo Australia spokesperson told *drinks* trade: "The RTD category has been challenged since the tax on premixed drinks was raised by more than 70 per cent in 2008. While that decline has eased in recent years, the category continues to be constrained by the disparity in tax when compared to competing products such as beer, wine, and cider".

So what are Australian consumers drinking? When it comes to RTDs, Aussies have always been partial to darker spirits, with Jim Beam White indicated as the top-selling RTD brand in 2014, closely followed by Jack Daniel's, Bundaberg Up and Canadian Club.

On the lighter side of the RTD market, Vodka Cruiser, Smirnoff Ice Double Black and UDL led the white spirit premix category.

With the RTD market in steady, but continuous decline, brands have been hard at work creating other, more innovative options for

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their consumers to imbibe. And when it comes to innovation, it appears the secret lies in the demand for two things: high-quality, premium beverages, and a comparatively healthier, low-sugar option for the health conscious among us.

Down to Zero

When *drinks* trade reported on the RTD market last year, it was clear that the sugar content of ready-mixed-drinks was an increasing concern for consumers, and the number of zero sugar options was increasing. 2014 was no different, and saw an influx of options for the health-conscious drinker.

Diageo Australia responded to this trend by releasing zero-sugar variants of its existing products. Smirnoff Ice Double Black Zero Sugar was released in April 2014 in response to the ongoing success of Smirnoff Ice Double Black Original. In line with this, Diageo also released a range of Zero Sugar UDLs.

Upon the launch of the products, Diageo Australia Marketing and Innovation Director, Adam Ballesty commented: "We know our consumers are looking for more than what is currently on offer in the pre-mix fridge…Diageo Australia continues to lead the vodka pre-mix market, largely due to the performances of Double Black and UDL."

A Diageo Australia spokesperson also commented: "since the release of Smirnoff Ice Double Black Zero Sugar…our sales data has shown us that 51 per cent of consumers have been newly introduced to the SKU by the zero sugar offering, without having ever tried Smirnoff Ice Double Black previously".

A Pre-mixed Premium

While the industry may be growing tired of being assured that "Australians are drinking less, but drinking better", there show no signs of this trend decreasing. Premium products continue to be at the forefront of consumers' palates, and the drinks

industry is clearly keeping up with demand.

According to Nicole Stanners, Wild Turkey Bourbon Marketing Director in Australia and NZ, "Consumers are increasingly interested in a brand's credentials – authenticity, along with quality and taste, are major considerations…Consumers are more likely enticed to purchase a product with a rich story". As such, Campari Australia created Wild Turkey Kentucky Straight Bourbon and Cola 5%, Wild Turkey 101 Premium and Cola 6.5% and Wild Turkey RARE and Cola 8%.

On the change, Ms. Stanners commented: "The RTD category has gone from being a mainstream brand dominated category to being a premium brand dominated category, with the gap increasing every year. The super-premium category is growing faster than the premium segment, and due to these offerings, consumers are passing over the mainstream and value bourbon brands".

Beam Suntory has recently released Devil's Cut & Cola 9%, moving the brand into the super high ABV segment of Dark RTDs, which the brand believes will open up a new segment of dark spirit drinkers.
Turn to page 41 for more information.

According to Ben Andrews, Jim Beam Marketing Manager: "'Premiumisation' and the category for higher ABV (than industry standard <5%) are both growing strongly." Beam Suntory launched the new-look Devil's Cut RTD range in May 2014, focusing on its unique extraction methods. It appears the new look was a good move from Beam Suntory; Mr. Andrews added, "The dark RTD 6-6.9 per cent category is an important focus for us. Interestingly, we have seen an impressive increase of up to 200 per cent of VPO in Australia's largest retailer when Devil's Cut is priced at $20".

Brown-Forman also jumped on the premium bandwagon in February 2014, launching Double Jack & Cola with a higher ABV (6.9%). Matthew Harada, Marketing Manager, Jack Daniel's Family of Brands said, "[The product] has been a strong contributor to our core Jack Daniel's RTD portfolio, delivering good incremental category volume and profit, and has grown the bourbon RTD category".

Australians are happy to go out and purchase a cocktail with top-shelf spirits, so giving them the opportunity to recreate or mimic these without the price tag, is on the mind of many distributors.

Vodka O, distributed by ASM Liquor, released a selection of naturally crafted pre-mix cocktails that were "Inspired by global trends and consumer demand for more premium, crafted and healthier choices" in July. Boasting real fruit juice, no added colours or artificial flavours and less sugar than competitors', cocktail-inspired flavours including Apple, Ginger and Spice, and Pineapple, Cucumber and Mint have been released alongside a $1.5 million launch campaign to give the products some attention.

More recently, ASM had its Vodka O range tested at the National Measurement Institute in Melbourne, which found the product to have 35 per cent less calories (per ml) than other leading RTDs and 30 per cent less fizz. Vodka O's existing health conscious offering looks to bolster its position among a growing demographic that's becoming more and more important to drinks brands. As put by ASM Liquor's CEO, Chris Flaherty: "As consumers become more and more health conscious, these things matter."

Similarly, Lemon Ed, distributed by VOK Beverages, is also responding to growing demand for such products.

While the category has slowed in terms of value growth, alternative growth can be found in the segment with exciting new innovations that are aimed to push the needle on growth in the next 12 months.

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Ed is made by winemakers at our state of the art winery, Step Rd of Langhorne Creek and is best enjoyed chilled and over ice.

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"Manufacturers are extending the boundaries of RTDs by *exploring the natural and local ingredients, unique production methodologies and pack formats that are relevant by channel or by customer."*

"Lemon Ed is a refreshing alcoholic lemonade beverage, which is a fusion of the traditional lemonade and lemon categories, which accounts for over 50 per cent of non-cola carbonated beverages. Ed is a hard lemonade, made with Queensland lemons by our winemakers at Step Rd, Langhorne Creek. We have also produced pack formats unique to channels - 500ml for retail and 330ml for on-premise."

"The category is constantly evolving with new flavours and various packaging innovation", Frederick Duarte, Suntory Australia, Group Brand Manager says.

Suntory recently introduced new flavour variants to a number of its RTD ranges, which Frederick says are trending globally and locally.

"Midori has consistently refreshed its range through new flavour variants, capitalising on flavours that compliment Midori and are trending both globally and locally. While WKD RTD has focused on its core flavour range of Iron Brew and Blue, and focused on line extension through packaging and launching a 6-pack can based on meeting consumer needs and tapping into occasion."

Not to be outdone, Diageo released its selection of Smirnoff Premix Flavours, served in larger scale 500ml bottles in October 2014. Three 'natural' flavours, including Smirnoff Apple Elderflower and Soda, are "breaking the code of smaller formats and offering consumers something different". Upon the release, Adam Ballesty commented: "Consumers are at the heart of everything we do, and by offering them…vodka premixed in a range of new, on-trend flavours, we believe it's going to result in big growth in the vodka category".

On the darker side of premixed drinks, Diageo Australia released Captain Morgan and Cola in January 2013 - a premixed format of the popular spiced rum. Since its release, a Diageo spokesperson claims there has been a 96 per cent growth in value: "We've seen significant growth for the RTD in the past 12 months", they added.

SouthTrade is also experiencing growth in the category, with its new and innovative Fireball Cinnamon Whisky RTD. Released in November, the RTD was launched in response to the Fireball brand's growth globally. The RTD adds apple cider to the Fireball whisky, creating a new and refreshing product, which SouthTrade says was "eagerly anticipated by consumers in Australia". In addition, the RTD was released in can format, timed for the outdoor entertaining and festival season.

Looking Forward

While the RTD market is in a clear decline, there is still hope for the category if distributors continue to observe and cater to the demands of its consumers.

According to Joe Spence, Innovation Manager at Diageo Australia, "The macro trend of health and wellbeing will lead to more innovation in this space, beyond just zero sugar. We'll see a greater scale in lower carb, lower calorie drinks, as well as the use of more natural ingredients and smaller format products."

While Frederick Duarte says: "The RTD category still plays a crucial role within the market space. They meet a particular need that consumers are looking for and cater to various social occasions, from the relaxed outdoor BBQ through to a higher energy night out."

Matthew Harada believes that moving forward, "The challenge for all of us is to identify what these opportunities are, and meet consumer expectations with our brands and products".

A Diageo spokesperson appears to agree, commenting, "While the category has slowed in terms of value growth, alternative growth can be found in the segment with exciting new innovations that are aimed to push the needle on growth in the next 12 months".

BLOCK RANGE

Distributed by: McWilliam's Wines
RRP: Lovedale Semillon ($75)
Rosehill Shiraz ($125)
Old Hill Shiraz ($125)

The latest range from Mount Pleasant, named after and made from the first planted vines at Maurice O'Shea's iconic vineyards – Old Paddock (founded in 1921), Rosehill (1946) and Charles King's Old Hill vineyard, founded in 1880 and the vineyard Maurice used to produce his first wines from.

Tasting notes:
2014 Mount Pleasant 1946 Vines Lovedale Vineyard Semillon
Classic citrus characters of lime and lemongrass dominate the nose, with wonderful intensity and purity. A well-balanced semillon, already displaying delicacy and power, poise and intensity. Incredibly long-length.

2013 Mount Pleasant 1946 Vines Rosehill Vineyard Shiraz
Intense violets, raspberries and spice aromatics, with hints of redcurrants, plums and blueberries supporting. Light to medium bodied. Lots of red fruit here. Lacy, almost filigree texture. A graceful shiraz, with a seemingly effortless charm.

2013 Mount Pleasant 1880 Old Hill Vineyard Shiraz
Intense blackberry and blood plums are prevalent on the nose, with lovely toast and spice from the fine oak used in this shiraz. Powerful, yet focused, with extraordinary depth. Will reward from long-term cellaring.

CALABRIA COOL CLIMATE SERIES FEATURES NEW LABEL

Distributed by: Calabria Family Wines
RRP: $15

Calabria Family Wines has re-released its Cool Climate Series with a new label, the first time the range has been updated since its release. Featuring varietals from premium cool climate regions across Australia and New Zealand, Calabria wanted to create a new label that better captured what the range is about.
"After five years in the market we wanted to capture the true essence of the range. We took the approach of revamping the design to communicate to our consumers the pureness of the 'Cool Climate' wine styles", Elizabeth Calabria, Marketing Coordinater at Calabria Family Wines said.
The range is available from Calabria and features a tempranillo and shiraz from the Hilltops region, pinot noir from Tumbarumba, an Eden Valley riesling and Marlborough sauvignon blanc, as well as a sauvignon blanc semillon from the King Valley.

LEAPING LIZARD NEW RELEASES

Distributed by: Robert Oatley Vineyards (WA), and The Wine Company for all other states.
RRP: $15

Leaping Lizard is the sister brand of Ferngrove Wines in Frankland River. The range includes fruit driven wines, expressive of varietal characters and concentration.
These wines have been produced from the premium regions of WA and offer impressive depth of flavours and structure, but at an affordable price point.

Tasting notes:
2014 Leaping Lizard Semillon Sauvignon Blanc
A 50/50 blend. Gooseberry and citrus notes are at the fore of this wine, with a clean and textured finish.

2014 Leaping Lizard Sauvignon Blanc
Aromas characteristic of sauvignon, while fruity acidity lends to a lively palate.

2012 Leaping Lizard Cabernet Merlot
Dark plum palate with generous mouth coating tannins.

2012 Leaping Lizard Shiraz
This wine has a fragrant, spicy/peppery cool-climate bouquet, which gives way to a lively and juicy medium-bodied palate.

RESCHKE 2014 PIERRE DE RONSARD ROSÉ

Distributed by: Domaine Wine Shippers
RRP: $23

A rosé release in time for summer, from the Coonawarra winery - Reschke. And one that looks to be popular based on the sell-out of the 2013 in the first week of its release.

Tasting notes: The 2014 has been produced entirely from merlot grapes, giving this rosé a unique stand-out characteristic from its category. A 'grown-up' and appetising wine, with a bursting red berry flavour and crisp finish. Well-balanced.

NEW SEPPELT SALINGER BOTTLE IN GOLD

Seppelt Wines is welcoming the new year with the release of its newly designed non-vintage Salinger Premium Cuvée. The new-look Seppelt Salinger NV bottle now features gold labeling, replacing the original black bottle.

The new image is aimed at capturing the core female sparkling consumer, while overall hopes to give the product a brighter shelf presence.

The wine inside the bottle remains the same however; continuing to offer the finesse, balance and fine bead, and creamy mouth feel Seppelt Salinger is renowned for.

Seppelt Salinger is also available in the 2011 vintage, which continues to retail in the black bottle design.

Seppelt Salinger NV Premium Cuvee retails for $24.99, while Seppelt Salinger Vintage 2011 retails for $29.99. Seppelt wines are distributed by Treasury Wine Estates.

TAYLORS ESTATE RANGE – NEW RELEASES

Distributed by: Taylors Wines
RRP: $18.95

Taylors Wines has released five new wines from the 2013 and 2014 vintages into its Estate range, including three reds and two whites. The range features wines that showcase the terroir of the Clare Valley and the characteristics of each varietal.

Tasting notes:

2013 Estate Cabernet Sauvignon
Notes of rich blackcurrant and subtle spice, oak and cedar cigar box. Well-balanced.

2014 Estate Merlot
A rich, youthful and vibrant wine that sits on the mid-palate with a velvety mouth feel. Drinking nicely now, but will reward from cellaring, possibly up to and beyond 2021.

2014 Estate Tempranillo
Blueberry, plum and black cherry flavours, as well as savoury French oak, and a touch of vanilla bean. Soft and silky mouth feel. Persistent finish.

2014 Estate Riesling
A vibrant riesling with citrus characters of lime and lemon both in taste and aroma. A classic Clare riesling.

2014 Estate Chardonnay
White peach, nectarine and subtle floral notes. Stone fruit flavours are carried through onto the palate, along with cashews and toastiness from the use of French oak.

NEW FOR THE ON-PREMISE: DEVIL'S LAIR 'DANCE WITH THE DEVIL' WINES

Distributed by: Treasury Wine Estates
RRP: $24.99

Devil's Lair has added two new varietals to its on-premise range - Dance with the Devil. The range offers textural wines with interesting complexity and character that match well when paired with food.

The new varietals - chardonnay and cabernet sauvignon - have, in addition, been made using different styles of winemaking in comparison to their counterparts, allowing these two new wines to offer something a little different to the rest of the range.

Tasting notes:

2014 Dance with the Devil Chardonnay
'Wild' ferments have been used in this wine, as well as 100 per cent malolactic fermentation and a higher percentage of new French oak barriques. The result – a richer, more textural palate, with a softer, more secondary profile and creamy nougat nuance.

2013 Dance with the Devil Cabernet Sauvignon
A small percentage of malbec and petit verdot have been incorporated into this wine, with some parcels of different varieties fermented together, as well as some use of one and two year old large format old French oak. Together, these techniques have given this wine a lifted perfume, no new oak influence and savoury, soft tannins, as well as less acid.

WHERE TO NEXT FOR WA WINE:
A STEP CHANGE IN STYLE AND PRICE *and* THE PURSUIT OF CHINA

From purely a quality perspective, the WA wine industry continues its casual stroll through a succession of great vintages that have delivered exceptional wines at the super-premium end of the market and increasingly better value for money wines at lower price points.

Contributing to this have been the superb vintages from 2007 through to 2014, as well as continued refinements of maturing vineyards and advances in winemaking.

But of course, that is a most simplistic summary, because as always sitting behind the quality parameter are complexities that have continued to gnaw at the industry, so that nothing is as simple and easy as it seems. And like those in the rest of the country, the most common description uttered by producers, distributors and retailers, is that *"it's pretty bloody tough out there"*.

Those who are surviving best are keeping a sharp eye on the changes and trends within the industry and doing their best to stay on top of them. By Ray Jordan

For instance, one of the most significant developments has been the evolution towards new age chardonnays. Most WA producers have headed down this path, although thankfully the best continue to maintain a slightly more robust regional style, and more consumers are gravitating back towards chardonnay as a result.

Nowhere is this more evident than with the chardonnays from Margaret River, which continues to lead the way. The wines are finer and more elegant, yet they have retained a powerful intensity that hopefully will never be lost in the pursuit of even more delicacy by some producers, especially those in the eastern states.

Fifth Leg from the Margaret River region is one such example, which most recently redeveloped the style of its 2014 vintage chardonnay, to meet changing consumer preferences.

"The palate of the 2014 vintage reflects a more 'traditional' style as apposed to the 'crisp and refreshing' style of previous vintages", Toni Carlino, Senior Marketing Manager Regional Brands, Treasury Wine Estates, explained. "This reflects changing consumer tastes – we've noticed a bit of a swing from wine drinkers who want to see those traditional flavours captured in chardonnay, which we're really pleased to see".

Also home to Margaret River is the renowned Devil's Lair brand, which has also recently made changes to the style of its chardonnay, as well as its cabernet sauvignon, with the hope of reinvigorating interest and variety within the portfolio, Ms. Carlino says. The brand has also refined its sourcing over recent years to achieve its desired styles, now sourcing chardonnay from its estate vineyards in the south of Margaret River and cabernet from Wilyabrup in the north.

Most recently, the brand has released a chardonnay and cabernet sauvignon into its on-premise Dance with the Devil tier, both noticeably different in style to other wines of the same varietal released by this brand, with much more texture and interesting complexity and character. Ms. Carlino says that the brand is also soon to release the Devil's Lair 9th Chamber Cabernet Sauvignon, which aims to showcase the "ultimate expression of Devil's Lair Cabernet".

And encouragingly, there are some exceptional chardonnays from other regions as well, providing a huge range of choice in style and price point for consumers.

Ferngrove Wines, located in the Frankland River, is one such winery that is directing its core focus over to chardonnay, and sees it as the varietal to edge out existing competition from NZ sauv blanc.

"The purity and quality of chardonnay coming from the Frankland River has been a focus for us as there is a need to respond to the growing dominance of NZ sauv blanc, and now is the time to steer people away from drinking NZ sauv blanc and towards new, 'slender' styles of Australian Chardonnay", Andrew Blythe, Sales and Marketing Manager at Ferngrove Wines said.

"Cool climate is the key to new wave chardonnay and Frankland River is well placed in what Halliday terms the "dress circle" of cool climate regions."

Over at Fogarty Wines, located in Millbrook, chardonnay has also been at its core focus as of late.

In the IRI-Aztec MarketEdge Liquor Outlook MAT to 30/11/14, the reported top 10 varietals produced in Australia does not give mention to riesling, representative of its small market presence in terms of volume, in comparison to those such as sauvignon blanc, shiraz, chardonnay and cabernets.

"Our chardonnay has been the subject of the most intense work over the past few years and we are starting to see the results of this effort. The most notable is the winning of the 2014 Halliday Australian Chardonnay Challenge. Wild yeasts, minimal intervention and careful barrel selection have been some of the key features", Stephen Bradshaw, Marketing and Sales Manager at Fogarty Wines explains.

Steve also says that it has placed a focus on producing wines that meet growing demand from the on-premise in the region.

"Millbrook has had quite a lot of interest from restaurateurs looking for different/unusual varieties and we are keen on showing customers the vast array of different wine styles and varieties that can be produced in the premium regions of WA. Plus it is interesting for all of us to experiment with these varieties and have something different to offer!"

The continued strength of New Zealand sauvignon blanc; the emergence of alternative varieties; and the return to chardonnays, has contributed to a slight drop in the staple SSB and SBS blends. While the pure unoaked styles are still important, more winemakers are experimenting with oak to create wines of great complexity and style. An increase in the number of lightly oaked sauvignon blancs has added another small point of difference also.

Such is the case for McWilliam's Wines' Evans & Tate portfolio, which has seen an increased focus on its sauvignon blanc in the last year and a change in style, with change to its texture, length, fruit and oak. And interestingly, like Devil's Lair, has begun sourcing fruit from the Wilyabrup area.

"We have increased our focus on texture and longevity by making wines from well shaded fruit, grown in good soils in the warmer Wilyabrup area. We have also included more pressing fractions followed by full, solid wild barrel fermentations in puncheons. The use of full solids has proven essential to integrate the oak seamlessly. This ensures the fruit is still at the forefront of the style, whilst the subsequent fusel alcohol production compliments the sauvignon tropical notes", Matt Byrne, the winemaker at Evans & Tate said.

"Unfortunately, you commonly see the message that sauvignon blanc is "fresh, fresh, fresh", with

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Margaret River coast

Vintage time at the Devil's Lair winery

MAT to 03/08/14, the overall purchase value of wine in Australia rose by 1.2 per cent, representing consumers purchasing wines retailing at higher price points. (Aztec-IRi)

Cabernet sauvignon and chardonnay are among the top five biggest varietals by volume in the Margaret River, along with sauvignon blanc (its biggest), semillon and shiraz. Cabernet sauvignon is its second biggest, with 18 per cent share of total tonnes and chardonnay fourth, with 16 per cent. (2010 ABS Vineyard Study)

a one-year-older wine being viewed as inferior or old. The sauvignon blanc variety deserves more respect than that and this style shows another side to sauvignon blanc, where the consumer can have familiar sauvignon cues and the connoisseur, who is after more complexity and uniqueness of a fumed sauvignon."

When it comes to riesling on the other hand, despite some of the best being produced in WA, sales have continued to be subdued, with the emergence of newer fresh varietal aromatic whites not helping the riesling cause.

In the reds, the cabernet bar has been raised to a level not seen before, with winemakers taking advantage of exceptional vintages in just about all wine regions to make some truly world-class wines. And consumers are buying them.

And interesting development has seen the sudden emergence of Swan Valley reds. These somewhat forgotten gems are being taken seriously once more as winemakers take advantage of very old vineyards for grenache and shiraz in particular, to produce exceptional wines.

Such an example of this is at Houghton Wines, based in Swan Valley, where a change to the style of its reds has seen the winery move back to a more 'natural' approach in its winemaking as Ross Pamment, Senior Winemaker says so himself.

"Increasingly we're moving away from cultured yeast for making red wines. Red ferments for all our premium icon reds are now undertaken utilising the natural indigenous winery yeasts.

"We've been comfortable with this over the last four or five years and have recently extended the concept into our commercial red wines as well. We believe we get better texture and interest in the wines. And whole bunch inclusion in shiraz ferments to build complexity and palate structure, although this is not a new concept", Ross explains.

"We've also been playing around with some 'natural' winemaking with mainstream northern white varieties, such as verdelho and chenin blanc. But these have been confined to small batch trials for interest sake, more than anything", but possibly this is a sign of things to come from Houghton Wines and even Swan Valley?

Rosé too has started to gather momentum, with the lighter and drier Provence style rosés becoming extremely popular.

In general, there is now a wider acceptance of the wines from the Great Southern and of other regions such as Pemberton and Geographe, as consumers realise that a stamp of Margaret River doesn't always guarantee quality.

And still value for money and price continue to be the major drivers of wine sales. Quality at a price point is becoming more important as wine consumers become even more savvy.

When you look at the cabernets and chardonnays from Margaret River in particular; the wonderful shiraz from Frankland River; the pinots from the emerging Porongurups and Pemberton/Manjimup; and the developing Geographe and Blackwood, you see the quality is outstanding.

And this year especially, the emergence of really impressive quality second tier ranges sitting behind the premium wines is a clear reflection of the maturity of vineyards and the excellent quality of fruit available to winemakers.

Mr. Blythe says such is the case for Ferngrove Wines; "Domestically we've continued to focus our efforts on the growth of premium bottled wines in the $20-$30 segments, with an emphasis on chardonnay, cabernet sauvignon, shiraz and malbec. It's still the strongest area of potential and our sales mix backs this up."

Similarly, Evans & Tate says: "We continue to see growth in higher priced tiers across total wine as retailers actively push premium priced wines to extract value in a stagnant volume category – WA wines is no different, with growth seen in >$12, while <$12 declines.

"At McWilliam's we are successfully developing NPD under the Evans & Tate brand that aims to attract new premium consumers and encourage our existing drinkers to trade up".

Ms. Carlino from TWE, says that the Devil's Lair portfolio has also recently expanded to offer a broader range of price points for wine drinkers seeking out

Manjimup exports a staggering 83 per cent of its exported wine to China, followed by Pemberton (38 per cent), Great Southern (30 per cent) and Margaret River (24 per cent). While in Geographe and the Swan District, China is the second biggest export market, second to the UK in Geographe, where its export volume is 9 per cent higher than to China, and Denmark in the Swan District, with 2 per cent difference between the markets. (Wine Australia Wine Export Approval Database)

Margaret River. "In addition to our core tier of chardonnay and cabernet sauvignon (RRP $49.99), we are now on the fourth vintage of our Devil's Lair 'The Hidden Cave' tier (RRP $22.99), which we introduced in response to the growing demand for Margaret River wines in this price bracket."

And clearly exports are continuing to be an important part of the sales mix. Traditional markets remain difficult, although the fall in the Australian dollar should start to have an impact.

Asia continues to be important, with about 50 per cent of WA's exported wine going into Asia, and about a third of that into China. Asia takes 60 per cent of Australian wine valued above $10 per litre FOB - a category that is profitable and sustainable.

The Chinese market is at an important stage. To some extent it has taken a bit of a breather, mainly with some of the high profile major national brands, but for niche marketed premium wines targeting the growing middle class, there is opportunity.

And of course, the Free Trade Agreement will gradually start to have a major impact, although this will probably take a little time to flow through.

"Ferngrove has been active in China now for the past three years, with the launch of branded retail wine shops", Mr. Blythe said. "Over the past three years, Ferngrove would have shipped over 150,000 cases to China, representing the largest export shipments of bottled branded wines for any Western Australian wine company to the Chinese market.

"The Free Trade Agreement comes as positive news to the industry, however, I don't think it will be an immediate silver bullet for the Australian wine industry."

The key is to market West Australian wines as premium. This is not something that can happen overnight, but those who have been spending the time pressing the flesh and doing the hard yards are starting to develop strong repeating markets for their wines.

And guaranteeing provenance of the wines, with a strong sense of place, will become increasingly important as the Chinese market becomes more sophisticated and knowledgeable. And this is coming far sooner than many people really appreciate.

And Australian brands that have already entered the Chinese market agree.

"The quality of Western Australian wines and in particular our Evans & Tate wines out of Margaret River, is exceptional", Garrick Harvison, McWilliam's Wines APAC General Manager said. "It is this superior quality out of the region that we market to Asia in the form of strong third party endorsement and long-term distribution partnerships."

Ferngrove Wines' winemaking team - Kim Horton (left) Senior Winemaker, Marco Pinares (centre) Winemaker and Marelize Russouw (right) Winemaker.

"Generally speaking, most Asian consumers are very familiar with Bordeaux wine, but are now looking for something else to consider. Given the similarities between the two regions, and our close proximity to many Asian cities, Margaret River is well placed to continue to increase exports.

"In terms of what is popular, you can't go past cabernet sauvignon from Margaret River. There is also a growing interest in crisp white wines, such as semillon sauvignon blanc, although typically the region still prefers red wines to white."

While Mr. Blythe says: "Generally across the region, we see younger consumers showing interest in wine and moving beyond its current niche of being a prestige product. From this, we tend to have success with styles that are lower in acid, have more subtle tanning and that will equally go with Asian cuisines. Off-dry riesling and more subtle, softer shiraz tend to work well for Asian countries we export to also."

For a small producer such as Fogarty Wines, marketing to the region is somewhat limited and therefore the company prioritises making personal visits and attending wine tastings, and similar events, to ensure that trade are meeting and connecting with the brand, overall helping to encourage awareness in the region.

Additionally, Fogerty Wines finds a multi-approach as the best method to market and finds a mix between demand for high and lower priced wines.

"We are already involved in China with distribution in three regions - Shanghai, Beijing and Guangzhou", Mr. Bradshaw explains.

"We see some polarisation in the Chinese market in particular. One of our importers take only our top-end wines, while the others are more focused at the commercial end. It really depends on the markets that they target in their own region."

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*Source: Nielsen MAT 14 December 2014 †Source: Total Range Current Vintage Medal Tally

Australia's First FAMILIES OF WINE

In 2009, 12 of Australia's leading family owned Australian wineries came together to form Australia's First Families of Wine (AFFW). Together, the 12 represent generations of winemaking, which have not only upheld the Australian wine industry, but have driven it to where it is today.

The group formed to celebrate and share their story. Spanning 16 of Australia's infamous wine regions and four states, here, and in coming issues, *drinks trade* helps these families' stories to be heard, speaking of their heritage, history, the custodians of their lands and the future of these family businesses – the next generation.

BURCH FAMILY WINES

By Amy Burch

Left to right: The Burch family - Richard, Natalie, David, Jeff and Amy Burch

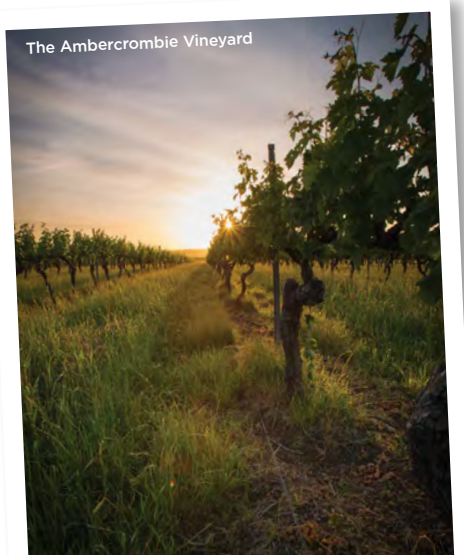
Established in the coastal town of Denmark by the Wade family, Howard Park was one of the original wine pioneers in the Great Southern region, originally producing a Riesling and a Cabernet Sauvignon.

Our family's frequent trips to the Margaret River region saw us regularly interacting with many great wine producers who shared our passion for wine and hunger for knowledge. Driven by this passion, we entered into a partnership with the Wade family in 1993.

In 1998, our family took over complete ownership of Howard Park Wines, and in the same year expanded into the Margaret River region with the purchase of a vineyard in the Wilyabrup region. Two years later, we opened our cellar door in Margaret River.

In 2012, we decided to put our name to our wine portfolio, introducing the Burch Family Wines umbrella brand, which produces the Howard Park, Marchand & Burch and MadFish ranges.

Three generations of our family have contributed to the business. Leston Burch - Jeff's father - played an integral role in helping establish the Margaret River winery, and assisted in planting the Leston vineyard.



The Ambercrombie Vineyard

Jeff and myself represent the second generation, and have been at the forefront of Howard Park since entering into the business. At the head of one of Western Australia's largest family owned wineries, we continue to have major influence over the business, with Jeff as CEO and myself as General Manager/ Marketing Director.

For the last ten years it's been Jeff's vision to secure vineyards where we source fruit for our wines so we can control the quality of the fruit and the management of the vineyards, ensuring a solid future for our wines for generations to come. Today we now own about 85 per cent of the vineyards we source from, with the latest purchase in 2014 of our Abercrombie Vineyard, where the fruit for the flagship Abercrombie Cabernet Sauvignon has come from. These vineyards are over 40 years old - some of the oldest vines in the Great Southern.

Our children - Natalie, David and Richard, are integral in driving the company's ongoing success. Natalie has been involved in the family business for 10 years and is currently the Operations Manager of the Margaret River winery. David works in Web and Marketing, and Richard is the Sales Manager for the eastern seaboard of Australia.

With the business celebrating its 30 year anniversary in 2016, Jeff and I continue working tirelessly to leave a legacy for our family, and hope that it will continue to remain in the family for generations to come.

MATEUS

THE ORIGINAL

The Mateus story dates back to 1942 when Fernando Van Zeller Guedes used innovative technology to create a pink-coloured wine made exclusively from Portuguese red grape varieties. Incorporating techniques similar to those used in the making of white wine, by avoiding prolonged contact between the must and the skins, the wine acquired its distinct pink hue and retained a soft and fruity style.

From the outset, Fernando had a vision to create a wine with a strong personality and unique flavour that would take Portuguese wines to an international scale.

Mateus Rosé Original is perfectly suited to Australia's climate; a wine for all occasions, offering a simple, sophisticated and refreshing drinking experience.

Over 70 years on, Mateus has achieved global fame, helped too by the history of innovation shown by its iconic bottle, which was inspired by the shape of the flasks used by soldiers during WWI. As well as paying tribute to its long-standing history, this unusual bottle shape ensures Mateus stands out on shelves and leaves a lasting impression with consumers.

Joining the company in 1988, Miguel Pessanha was then charged with diversifying the company's entire range of wines, and as a result of his sound technical knowledge, organisational and leadership skills, he took over coordination of the company's winemaking teams. This led to his position on the Board of Directors with responsibility for oenology, viticulture and the supply chain. Out of all his many duties now, making Mateus is the one he loves best and finds most rewarding - "It's a real challenge! Especially nowadays, with Mateus' distinct profiles which are the result of years of experience transformed into wines of great quality and character".

With this vast history, it is no wonder Mateus has been associated with personalities as different as Jimi Hendrix, the Queen of England and as controversial as Fidel Castro. Not content with that, it was then voted by a panel of more than 200 wine professionals as one of the 50 Most Admired Wine Brands in 2014.

Mateus Rosé Original is a fresh and fragrant wine with aromatic intensity and an appealing, lively and bright pink rosé shade. Paired with current trends in consumption towards fresh, light, and slightly sparkling wines, make Mateus ideal for the Australian climate.

Over the coming months, keep an eye out for unique on- and off-premise sampling activations across Australia, aimed at increasing awareness and trial of Mateus.

Mateus is the #1* table Rosé wine in Australia with 9.2% share of market

*Source: Aztec scan data, Australia liquor weighted, dollars, mat 25/01/2015

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Mateus Rosé Original retails for $12.99 and is available through McWilliam's Wines.

Best Served Chilled

JIM BARRY

CLARE VALLEY

Lodge Hill Vineyard

Left to right: Tom, Peter and Sam Barry – custodian and future generation of Jim Barry Wines.

JIM BARRY WINES

By Olivia Hoffmann

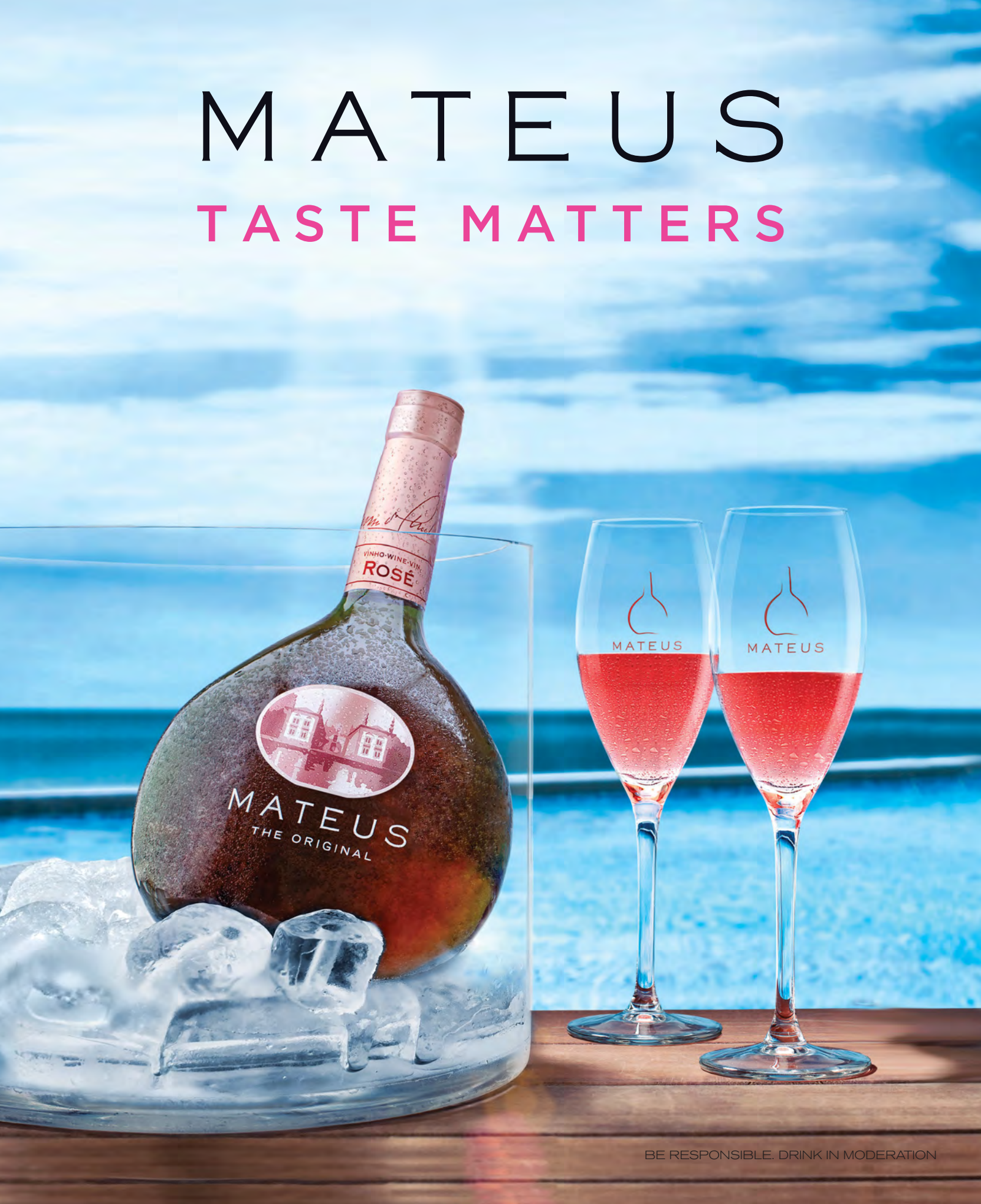
Jim Barry Wines was established in 1959 by the late Jim Barry and his wife Nancy. Jim himself was the first qualified winemaker in the Clare Valley, graduating with just the seventeenth degree in Oenology from the famous Roseworthy Agricultural College in 1947. Working for 22 years as winemaker at the Clarevale Co-operative, Jim Barry became a pioneer of Australian table wine and helped fellow AFFW member, Taylor's Wines, establish in 1969.

Jim and Nancy's second son Peter, along with wife Sue, are the current custodians of Jim Barry Wines and are deeply proud that the winery is still family owned. Since becoming Managing Director in 1985, Peter has focused his energy on expanding the company's export markets, as well as its viticultural holdings in both the Clare Valley and Coonawarra.

Peter and Sue's own sons, Tom and Sam, now play an active role and take the business into its third generation. After graduating from Roseworthy, like his father and grandfather before, Tom returned home to take over the winemaking mantle. After completing various vintages in Australia, Germany and Austria, he turned his focus to the family's riesling portfolio and looked to implement some of the things he learned overseas, whilst remaining true to the style developed over the last fifty years. In 2013, Tom was named Gourmet Traveller WINE magazine's 'Young Winemaker of the Year.'

Younger brother Sam focused his energy on the numbers side of the business, graduating with a degree in Commerce (Accounting) from the University of Adelaide. He is now the Commercial Manager for Jim Barry Wines, working closely with the company's domestic and international distributors. The family passion for wine still flows through his veins however, as he is also currently completing his WSET diploma.

The Barry family name is synonymous with the Clare wine region and their deep ties to the local community have only strengthened as the winery has passed from generation to generation.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The YEAR That WAS

INDUSTRY SNAPSHOT

2014 – a year of significant changes for the Australian drinks industry.

The year saw major trends across the premium and craft segments, as well as changes in consumption habits, with the lowest consumption levels within the last 15 years recorded in 2014. Innovation has continued to be employed by marketers as they navigate their way through a challenging market, particularly for spirits and RTDs, which are both in decline, while beer and wine continue to sit on a flat market. Cider, surprisingly, is leading the way, stealing share from across the sector and its growth has no signs of slowing down. In addition, 2014 saw new and increased regulation in the industry, particularly in NSW, where Government banned sales after 10pm in the off-premise, while lockouts were introduced to on-premise venues in the Sydney CBD and Kings Cross precincts.

As we begin the new year, let's take a closer look back at the year that was – trends, sales, value, volume and consumption patterns across categories – to what's in store for 2015

By Hannah Sparks

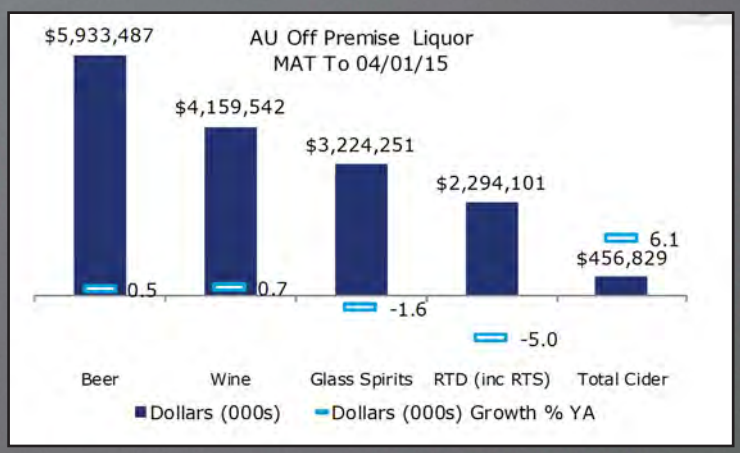
Dollars Growth

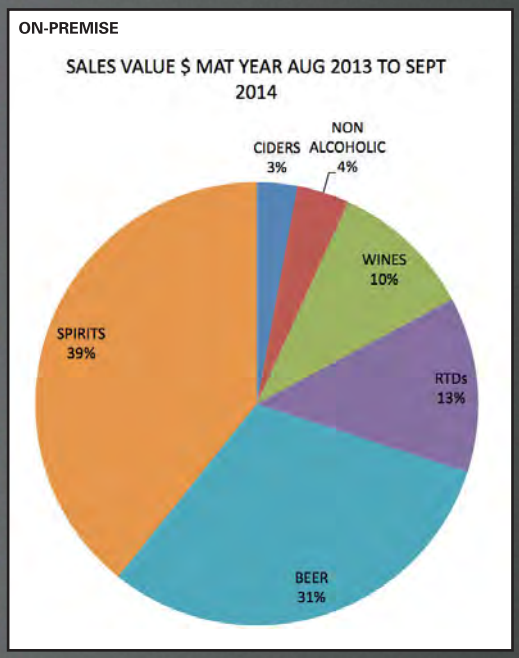
The off-premise package liquor sector saw a decline in dollars in the 12 months to 04/01/15, IRI-AZTEC MarketEdge Liquor Outlook reports, by -$90,618,000, totaling $16,068,210,000 at the end of the year, in comparison to $16,158,828,000 at the end of the 12 months prior.

While cider represented the least amount of dollars in the sector ($456,829,000) in 2014, the category did however see the largest growth in dollars in the sector, up by +6.1 per cent from the 12 months prior to MAT to 04/01/15. Both wine and beer also experienced growth in dollars in the same period, by +0.7 per cent and +0.5 per cent respectively - wine earning a total $4,159,542,000, driven by bottled white and red wine, and beer a total $5,933,487,000, driven by the full-strength sub-category. On the other hand, glass spirits and the ready-to-drink (RTD) categories experienced negative growth in dollars – by -1.6 per cent and -5.0 per cent respectively.

The on-premise in Australia also experienced a number of challenging factors in 2014, as the number of Australians choosing to drink at home continued to increase. In addition, on-premise venues continued to struggle for market share due to growth in the number of liquor licences, adding to an already saturated market.

Nevertheless, NILWA, which represents around 6,500 venues, with 80 per cent of those in the on-premise, records total growth in value by 20 per cent, as well as growth in volume by 16 per cent, in comparison to the year before and in just the six months from July-December 2014. NILWA's statistics show that consumers, despite what overall trends suggest, are continuing to drink out in venues, driven particularly by the younger demographic, Martin O'Mara, Managing Director at NILWA says, who are driving growth particularly in the craft spirit segment.



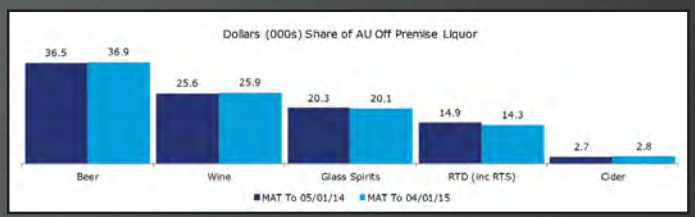


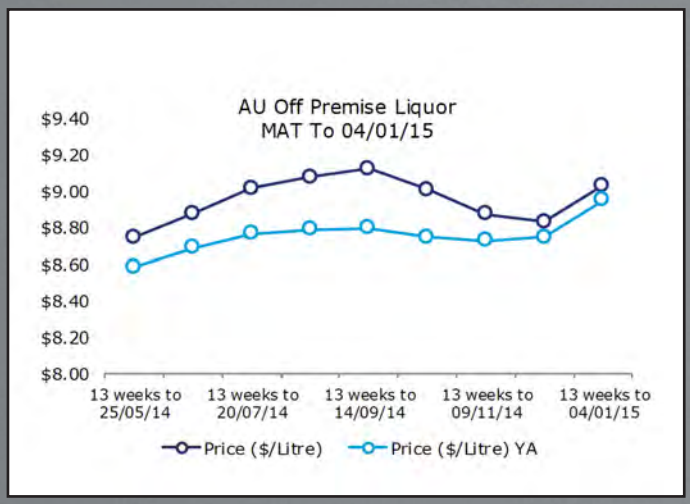
Share of Dollars

Of the total off-premise dollars generated last year, beer alone represented the most, with a share of 36.9 per cent MAT 04/01/15, up from 36.5 per cent MAT 05/01/14 - over a third of the total. Wine followed, representing the second biggest share of the sector's dollars, with 25.9 per cent, also seeing an increase, up from 25.6 per cent MAT 05/01/14. Similarly cider saw an increase, with 2.8 per cent share MAT 04/01/15, up from 2.7 per cent MAT 05/01/14.

Glass spirits also maintained its position as the third largest category by share of dollars, with 20.1 per cent of the total and RTD as the fourth largest, with 14.3 per cent share. Both categories did however see a decline in their shares - spirits down from 20.3 per cent and RTDs down from 14.9 per cent MAT 05/01/14, reflective of the negative growth in dollars that both experienced during the period. (IRI-Aztec)

In the on-premise however, NILWA reports spirits as the largest shareholder of total sales value ($), with 39 per cent, followed by beer, with 31 per cent. Additionally, RTDs out did wine in sales in 2014, with 13 per cent share of the total and wine with only 10 per cent. While cider in the on-premise, as in the off-premise, represents the smallest share of dollars, with 3 per cent of the total value. (August 2013-September 2014)





Purchase Value

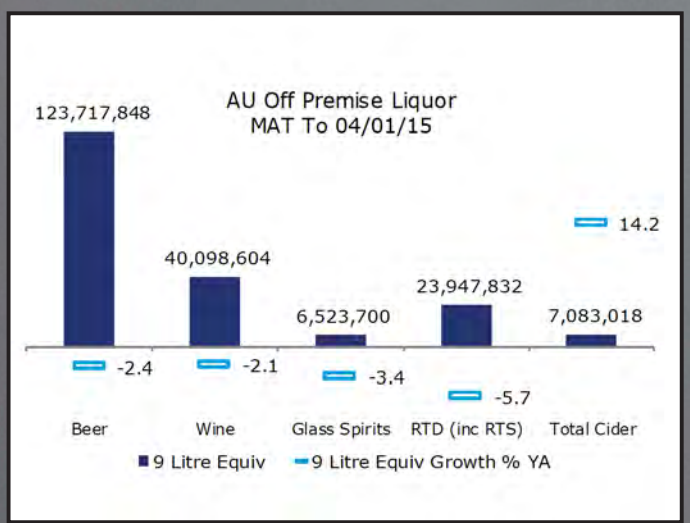
In the 12 months ended 04/01/15, IRI-AZTEC shows the overall total purchase value of packaged liquor in the off-premise in Australia as down, by -0.6 per cent, in comparison to the 12 months prior, due to a decrease in average purchase value in both the glass spirits and RTD categories - -1.6 per cent and -4.4 per cent respectively.

Beer, wine and cider on the other hand, all increased in purchase value; beer increased by +0.5 per cent and wine by +0.7 per cent, and most significantly, the average purchase value of cider increased by +6.1 per cent.

Volume

In the same period, IRI-AZTEC also found that the total volume of packaged liquor in the off-premise decreased, by -2.3 per cent, representative of a decrease in volume across beer, wine, spirits and RTDs.

RTDs saw the most significant decrease in volume, down by -5.2 per cent, followed by spirits (-3.4 per cent), beer (-2.4 per cent) and wine (-2.1 per cent). Cider on the other hand increased in volume, and significantly, by +14.2 per cent, driven by apple and pear flavoured ciders, and representative of overall increased consumer demand for the category.



Share of Volume

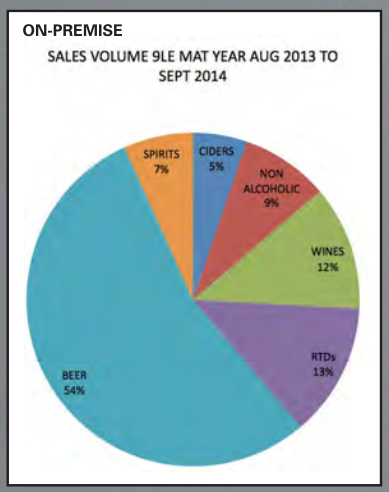
Beer continued to be the biggest category by volume (9 litre equivalent) in the off-premise packaged liquor sector in 2014 (MAT 04/01/15 in comparison to MAT to 05/01/14), with 61.4 per cent share of the total, and followed by wine, with 19.9 per cent share (the second biggest share of volume in the sector).

While the RTD category also maintained its position in the same period, as the third largest category by volume with 11.9 per cent share, the category did however see a decline in its share, down from 12.3 per cent in comparison to the 12 months prior to 05/01/14, driven by declines in the RTD dark and light categories, as well as in shots and chilled minis, which declined significantly in volume by almost half. The spirits category also saw a loss in its share, down from 3.3 per cent in MAT to 05/01/14 to 3.2 per cent MAT 04/01/15, driven by declines in bourbon, scotch, vodka, rum, liqueurs, tequila and brandy.

The RTD and spirits category's loss, as a result, saw cider gain in share, up from 3.0 per cent in the 12 months to 05/01/14, to 3.5 per cent in MAT 04/01/15. In addition, the change also resulted in the re-positioning of cider from the smallest category by volume to the fourth largest, and spirits to the smallest. (IRI-Aztec)

In the on-premise on the other hand, NILWA reports that spirits was the biggest category in the sector in 2014, with a recorded 70 million spirit nips delivered to venues during the 12 months. In the same period, 59.5 million glasses of beer were supplied to the on-premise, as well as 35.5 million glasses of wine, followed by 11.5 million bottles of RTD and 6 million glasses of cider. Unlike the off-premise, Mr. O'Mara says cider is in decline in the on-prem, driven by a decline in demand for and consumption of sweet European styles, as drinkers appear to be instead returning to established brands or craft brand ciders.

In addition, NILWA's reported sales by volume in the on-premise



(August 2013-September 2014), show beer out on top, with 54 per cent share, followed by RTDs (13 per cent), wine (12 per cent), spirits (7 per cent) and cider (5 per cent).

Trends

Cider Is on the Rise

The cider category is experiencing astonishing growth in volume, value and dollars in the off-premise, reflective of increasing popularity among existing and new consumers year-on-year. Cider is increasingly becoming a popular alternative to beer, particularly among health conscious consumers, with innovation in new flavours outside of the original apple cider variant also aiding its growth in popularity. In addition, increased taxation on RTDs has driven younger drinkers to the category, who are opting for cider as the cheaper option, while cider's healthier 'benefits', such as the fact that it is naturally gluten-free, is attracting the health conscious consumer.

Trends appear differently for cider in the on-premise however, where the category experienced a decline in 2014, driven by consumers moving away from sweet European styles, to established and craft brands. This is in fact a trend seen throughout the industry. While cider may have experienced a dip in sales as such trends transition consumers between sub-categories, there is no sign of cider's growth slowing down however. In fact, leading researcher, IBISWorld, anticipates cider will outstrip other categories in annual growth over the next five years.

RTDs and Spirits Suffer

The burgeoning growth of cider is however, coming at the expense of RTDs in the off-premise, with increased taxation on the category driving younger drinkers away and to the lower priced cider category, IBISWorld reports.

In 2014, the category also lost share in volume, value and dollars to beer and wine. Despite increased premium offerings in the category, perceptions of the category are yet to change, and the category's existing younger audience, who are looking for cost-efficient options, are being pushed away from the category as its value rises.

While it may be taking time to change perceptions, IBISWorld predicts that continued innovation and NPD in the category, such as new flavours and lower-carb offerings, will see declining trends reverse, repositioning the category as a healthier and more socially responsible category, helping to capture a new audience and increase consumption.

RTD consumption is also not losing hope in the on-premise, where the category is larger than wine in terms of sales, explained by its popularity on a night out. Turn to page 43 for Anna May's feature on the future of RTDs.

Spirits have also seen a loss in share to other categories across value, volume and dollars. Trends suggest that the high alcohol-content in spirits is discouraging consumers as health trends continue to rise.

IBISWorld predicts that consumption of the category will remain relatively flat over the next five years, with premium and craft products driving growth.

Wine and Beer Flattens

Wine and beer experienced a relatively flat year in terms of growth across value, volume and dollars. Changing consumption habits are providing challenges for traditional beer categories, with premium and craft beers taking share, while wine continues to recover from oversupply, IBISWorld reports. As such, the big beer companies have begun to increase their production of craft and importation of international premium beers, while wine companies continue to send wine offshore, with wine exports rising.

In addition, beer companies continue to struggle against the twice yearly indexation of excise, as well as the growing health conscious consumer, which is taking share from beer and placing it in the hands of wine, as the category increasingly becomes an alternative to beer. As a result, wine continues to experience slightly better growth than beer, but both category's incremental growth in 2014 was marginal.

For the future, IBISWorld expects craft and higher margin premium beers to help boost the category overall, while a healthy revenue is expected to grow in the wine industry as the category's popularity continues to grow among consumers, particularly the more unusual varieties like sangiovese and tempranillo.

Consumers Are Drinking Less

The Australian Bureau of Statistics (ABS) reported in 2014 that Australians are drinking the least alcohol ever recorded in the last 15 years; the overall decrease largely caused by the downward trend in consumption of beer, RTDs and spirits, as well as the flattening out in wine consumption. The Australian Liquor Stores Association's latest paper - 'Australia's Changing Drinking Habits: The Facts About Australia's Alcohol Usage', released in January this year, additionally identifies consumption declines as a result of a change in Australian's attitude towards alcohol; with more Australians consuming alcohol responsibly and an increasing number of Australians not drinking, or drinking less. Predicted trends suggest that consumption will continue to fall, but with consumption of premium and craft beverages continuing to grow.

Premiumisation and Craft

As consumption levels drop and consumer spend increases, tastes and preferences are changing, with a growing preference for premium, expensive and boutique products, IBISWorld reports. This is particularly the case across beer, wine and cider, which all increased in value in the off-premise MAT to 04/01/15 (IRI-Aztec). The same can be said in the on-premise, which reports craft and international beers as in growth.

Trends in premiumisation and craft are expected to add growth across all categories, while they are both major factors in sustaining the astonishing growth we're seeing in cider. And as a result, the market is expected to see a growth in the number of craft and premium products available.

TASTING BENCH

Here, *drinks* trade's expert tasters bring you the ultimate guide to the best wines on the market.

CABERNET SAUVIGNON

Reviews by Ken Gargett

There was a time in Australia when cabernet reigned supreme as the greatest grape of all. The rise of shiraz as 'Australia's Own' saw that variety eclipse Bordeaux's finest, but there are many wonderful examples of cab available. Coonawarra and Margaret River have established themselves as the preferred regions, but good wines come from all over Australia.

PENFOLDS BIN 707 CABERNET SAUVIGNON 2012 ($375)
COONAWARRA. CORK.
14.5%.
If not for the stunning 2010 Grange, this would be the superstar of the recent Penfolds releases. A glorious 707. Vibrant aromatics - such life. Cedar, dark chocolate, spices, dry herbs, violets, black cherries, coffee grinds and a hint of a beeswax note. The oak is beautifully melded. Completely seamless, serious intensity and with amazing length. Just a joy. One of the great 707s.
97

Distributor: Treasury Wine Estates

BLACK LABEL COONAWARRA CABERNET SAUVIGNON 2012 ($45)
COONAWARRA. S/CAP.
13.5%.
Wynns' most famous, most important and largest volume wine. A famous one – who doesn't have a few bottles in their cellar?
This latest release is one of their best. Confirms the excellence of the vintage. Cassis, dark chocolate, leather, cloves, anise, all on a seamless, yet concentrated palate, through to slightly puckering acidity. The palate offers an explosion of fruit and flavour. One for the ages. Coonawarra in spectacular form.
95

Distributor: Treasury Wine Estates

LECONFIELD CABERNET SAUVIGNON 2013 ($35)
COONAWARRA. S/CAP.
14.5%.
Bright purple hue. An alluring mix of black fruits and dark plum notes. A Coonawarra classic. There is a carefully crafted melding of fruit and oak. This is dense, intense and has great length. Super fine tannins and impeccably balanced. A famous local name in great form. Good luck finding anything that comes within cooee of this quality for this price in Bordeaux or the Napa.
96

Distributors: NSW - Veraison Wines; SA & NT - Options Wine Merchants; VIC - Leconfield Wines (Santé Wines) and Richard Hamilton & Syn (Westwood Wines); TAS - David Johnstone & Associates; WA - Epicure Sales & Marketing; Australian Independent Wine Wholesalers (QLD).

DI GIORGIO FAMILY COONAWARRA CABERNET SAUVIGNON 2012 ($23)
COONAWARRA. S/CAP.
14%.
A rich and bright cabernet that offers delightful blackberries and spices. It also gives the immediate impression of oodles of that typical Coonawarra choc-mint character. And yet it remains quite savoury. A mid-weight style with juicy acidity, fine tannins and decent length. Offers truly fabulous value.
92

Distributors: NSW & QLD - Estate Wine Distributors; ACT - Rogue Wines; SA - Wine Solutions Australia; VIC - Alepat Taylor; WA - Estate Wine Shippers.

HOLLICK RAVENSWOOD CABERNET SAUVIGNON 2010 ($77)
COONAWARRA. S/CAP. 14.5%.
Hollick's premium red spends 18 months in new French oak and at this relatively early stage, it is still melding. There are cigar box and cedary oak notes, mingled with blackberries, dry herbs and coffee beans. Offers that dry vegetation note so often seen in cooler climate cabernets, but it is nicely held in check. Attractive, but its best is yet to come.
92

Distributor: Vintage House Wine & Spirits

LEEUWIN ESTATE ART SERIES MARGARET RIVER CABERNET SAUVIGNON 2012 ($65)
MARGARET RIVER. S/CAP. 14.1%.
It might already have a few years under the proverbial belt, but this cracking cabernet is still as young and fresh as one could wish. Notes of black cherries, dark fruits, chocolate and cassis. This is supple, seamless and very long, maintaining intensity throughout. Very fine silky tannins. Real finesse. Love it.
97

Distributor: NSW - Fesq; QLD, SA & TAS - red + white; VIC - Nelsons, WA - Leeuwin Estate.

PIERRO RESERVE CABERNET SAUVIGNON MERLOT 2010 ($70)
MARGARET RIVER. S/CAP. 13.5%.
Cedar, spices, cigar box notes, roast meat, warm earth and red cherries. Lots of complexity here. A wine of elegance and finesse. Others may last longer, but it is lovely drinking now and will be for the best part of the decade.
94

Distributors: WA - Fine Wine Wholesalers; NSW & ACT - Cottenham Services NSW; VIC - Nelson Wine Company; QLD - Red & White; SA - Porter & Co; TAS - Nelson Wine Company.

HOWARD PARK MIAMUP CABERNET SAUVIGNON 2013 ($28)
MARGARET RIVER. S/CAP. 14.4%.
There are dark fruits, plums and even a smidge of ripe raspberries. Also axle grease, in the nicest way, and chocolate. Supple, clean and intense. Cashmere tannins. An intriguing mix to be found here.
94

Distributors: NSW & ACT - Young & Rashleigh Wine Merchants; QLD - Nelson Wine Company; TAS - Gulp Wines; VIC - Prime Wines and Nelson Wine Company; SA - Atlas Wine Group; NT - Thomas Chin Pty Ltd; WA - Off The Vine Distributors.

MCHENRY HOHNEN ROCKY ROAD VINEYARD CABERNET SAUVIGNON 2012 ($49)
MARGARET RIVER. S/CAP. 14.5%.
A single vineyard wine made with wild yeasts, which sees time in "inert oak". All this results in a plush classic cabernet with dry herbs, dark fruits and warm earth. Finely balanced and with impressive length, as well as the region's typically gravelly, yet silky tannins. Attractive now but offers an exciting future.
94

Distributor: Mezzanine Wine

FRASER GALLOP ESTATE PARTERRE CABERNET SAUVIGNON 2011 ($42)
MARGARET RIVER. S/CAP. 14.5%.
A seriously impressive mix of lifted aromatics and depth of flavour, all balanced on the proverbial knife edge. Offers an array of flavours – blackberries, roast meats and cigar box. Intense yet elegant. First class Margaret River cabernet from a winery that always offers amazing value.
95

Distributor: Domaine Wine Shippers

TURKEY FLAT CABERNET SAUVIGNON 2012 ($40)
BAROSSA VALLEY. S/CAP. 13.5%.
Move away from the classic regions and we have an entirely different beast. This is big, bold, and oozing flavour, but in fairness, the "classic cabernet characters" are a little muted. Sweet chocolate and black cherries. There is decent length and a firm finish. As a varietal cabernet, fair at best. As a delicious drink, thumbs up.
92

Distributor: Angove Family Wines

HARDYS THOMAS HARDY CABERNET SAUVIGNON 2012 ($120)
COONAWARRA, MARGARET RIVER & MCLAREN VALE. S/CAP. 14.1%.
A 70/27/3 per cent blend. Black fruits, a touch of chocolate and dusty note, in a much more austere style than their shiraz. Concentrated with understated power. Nice length, well structured. This wine will age very well. Apropos of little, Nottage Hill was introduced in 1967 as Hardys answer to Grange.
93

Distributor: Accolade Wines

TASTING BENCH

CHARDONNAY

Reviews by Ray Jordan

Originally, the grape of Burgundy in eastern France; today, a variety planted just about everywhere across the globe and doing well in the cooler climate regions of Australia, in particular - the Margaret River, Yarra Valley and Tasmania. In addition, newer styles of chardonnay expressive of their region, have brought somewhat of a renaissance to the category, which is expected to continue to flourish.

FIRST DROP MERE ET FILS ADELAIDE HILLS CHARDONNAY 2013 ($25)
ADELAIDE HILLS. S/CAP. 13%.
From those crazy guys at First Drop, who prove you can make serious wine and have some fun. A lovely, lightly framed chardonnay, with a touch of oak influence to balance the delicate fruit flavours. There's a little happening in here with almond meal and a touch of pear. An interesting wine that provides an alternative to other styles. Restrained and complex, with a slightly oxidative character that adds complexity to the equation.
91

Distributors: SA - Chace Agencies; QLD – Cuttings Wine; NSW – Winestock; VIC – Prime Wines; WA –Epicure; TAS – Fine Drop; NT – Thomas Chin.

MANDALA YARRA VALLEY CHARDONNAY 2013 ($28)
YARRA VALLEY. S/CAP. 13%.
Subtle, understated and yet so appealing is this beautifully structured and presented Yarra Valley chardonnay. Light stone fruit and creamy oak merge seamlessly with a touch of cashew and citrus tang. The palate is smooth and seamless, displaying excellent use of oak, which is brilliantly understated.
92

Distributor: Fesq and Company

FLAMETREE S.R.S. (SUB-REGIONAL SERIES) WALLCLIFFE CHARDONNAY 2013 ($55)
MARGARET RIVER. S/CAP. 13%.
A fine and quite flinty modern expression of Margaret River chardonnay. Finer and leaner it might be in some ways, but the unmistakable power and persistence of the region still triumphs. Complex mealy grapefruit and roasted nut characters on the nose, and a deep and richly intense palate power through to the finish. Oak is beautifully understated.
100

Distributors: WA - Off the Vine; VIC & TAS - Sante Wines; NSW & ACT - Cuttings Wine Merchants; QLD - Cuttings Wine Merchants; NT - NT Wine Sales; SA – direct from the winery.

VASSE FELIX HEYTESBURY CHARDONNAY 2013 ($65)
MARGARET RIVER. S/CAP. 12.5%.
Gosh this is such a good chardonnay. Power and intensity with such complexity already. Nose shows plenty of toasty oak working perfectly with the best parcels of fruit. Seamless and pure expression of chardonnay on the palate, with an underpinning of subtle winemaking artefact. Ranks with the finest chardonnays in the region.
97

Distributor: Samuel Smith & Son

TAPANAPPA TIERS 2013 CHARDONNAY ($75)
PICCADILLY VALLEY, ADELAIDE HILLS. S/CAP. 13.8%.
One of the very best in this distinguished line of chardonnays from the famous Adelaide Hills vineyard. Spicy, edgy lift on the nose; though it is on the palate that the brilliance of this wine really emerges. Deeply complex and powerful, yet delivered with a precise control and delicate understatement. Lingering driving finish extends through the palate.
96

Distributor: Terrior Selections

EILEEN HARDY CHARDONNAY 2013 ($95)
TASMANIA & YARRA VALLEY. S/CAP. 13.5%.
This is such a gorgeously made wine. Sourced from a number of vineyards in Tasmania and the Yarra Valley. Lovely smoky and slightly savoury nose, with some understated secondary characters. The palate is a beautifully pure and expressive thing of such delicacy and poise, but with a persistence and drive that carries the very long palate.
96

Distributor: Accolade Wines

MINISTRY OF CLOUDS TASMANIAN CHARDONNAY 2013 ($48)
TASMANIA. S/CAP. 12.9%.
I just love this wine, which is sourced from vineyards in the Huon Valley and on the Derwent River of Tasmania. It's restrained and refined, yet the power of the fruit takes over on the palate to carry through to a very long finish. Whole bunch pressing and all wild ferments have contributed to its texture and complexity. Stunning wine.
96

Distributor: Epicure Wines

COLDSTREAM HILLS RESERVE CHARDONNAY 2013 ($59.99)
YARRA VALLEY. S/CAP. 13%.
Aromas of light lemon and peach, as well as some nice stone fruit characters. On the palate a rich texture and multi-layered complexity emerges into a seamless and perfectly integrated structure. There's also a flinty chalky character contributing to a crunchy vibrant mouth feel. Superb stuff.
96

Distributor: Treasury Wine Estates

DEEN DE BORTOLI VAT 7 CHARDONNAY 2013 ($12.90)
VICTORIA. S/CAP. 12.5%.
For a big volume chardonnay, this has plenty to offer. Stone fruit and cashew on the nose with a vanillin oak influence. The palate is medium-bodied and richly textured, with a tight acidity holding its line to the long finish. Excellent drinking over the next couple of years.
89

Distributor: De Bortoli Wines

TYRRELL'S BELFORD SINGLE VINEYARD HUNTER CHARDONNAY 2012 ($40)
HUNTER VALLEY. S/CAP. 13%.
This is just such a beautifully textured chardonnay, displaying wonderful subtlety and finesse. Comes from a dry grown vineyard planted in 1991 and treated with hand picking and basket pressing through to completing fermentation in a mix of new and seasoned oak. The result is wonderful balance and poise, with a persistent long palate. Excellent.
95

Distributors: NSW - Tyrrell's Wines; VIC - The Wine Company; SA – George Street Wines; QLD - The Wine Tradition; WA - West Coast Wines.

SEPPELT JALUKA CHARDONNAY 2013 ($27)
VICTORIA. S/CAP. 13.3%.
A most impressive chardonnay, sourced from the Henty vineyard in Victoria. Has greeny hues with its pale straw colour. The mix of Burgundy and Mendoza clones has contributed to the powerful drive through what remains an elegant palate. It's all barrel fermented with about 15 per cent wild. Flavours are rich with crunchy nougat flavours and a little toastiness on the finish. Outstanding wine and great value.
93

Distributor: Treasury Wine Estates

BROOKLAND VALLEY RESERVE CHARDONNAY 2013 ($75)
MARGARET RIVER. S/CAP. 13.5%.
Restrained, delicate and oh so precise. This is high-class chardonnay from Margaret River. Delicate it might be, but you can't hide the awesome power of Margaret River. Mineral and roasted cashew characters with deep stone fruit richness. Texturally beautiful and just so drinkable. A modern and impressive chardonnay.
96

Distributor: Accolade Wines

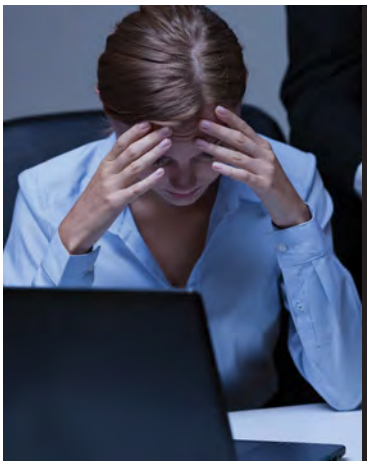
MANAGING WORKERS' MENTAL HEALTH IN THE WORKPLACE

One of the most important assets of all businesses, from production to hospitality, is its people. The mental health and well-being of a business' workforce can directly impact its performance. In fact, Beyond Blue reports that the average return on investment for every dollar invested in creating a mentally healthy workplace is $2.30.

By **Bill Kritharas, Partner, and Margaux McGuigan, Lawyer - Sparke Helmore Lawyers.**

Businesses have legal duties under the Work Health and Safety (WHS) legislation to ensure the health and safety of their workers, so far as is reasonably practicable. This extends to a worker's psychological health and physical health. Failure to comply with these duties can result in prosecution and significant fines for the business, its officers and its workers, and in extreme cases, imprisonment for up to five years for individuals.

As a business, taking steps to ensure the welfare and mental health of workers is essential from a WHS compliance perspective. Moreover, it is also a good investment from a financial perspective.



Safe Work Australia reports that mental stress costs Australian businesses more than $10 billion per year.

WHS Legislative Requirements

Under the WHS legislation, each person conducting a business or undertaking (PCBU) has a duty to ensure the health and safety of all workers (including contractors) involved with the business, so far as is reasonably practicable.

For the purposes of the WHS legislation, "workers" includes contractors working at your premises, as well as any other persons whose work is influenced by your business. This means that, for example, your business will have legislative duties to ensure the health and safety of delivery people, as well as any brand representatives or other contractors while they are on your business' premises, or undertaking work at your request.

Officers of a business (such as directors and senior managers) also have a positive duty to exercise due diligence, to ensure that the business complies with its WHS obligations. Safe Work Australia identifies that, when it comes to workplace bullying, these obligations include taking steps to ensure that the PCBU has, and uses, appropriate resources to eliminate or minimise risks associated with workplace bullying.

Although the business has the primary duty of care to ensure the health and safety so far as is reasonably practicable, workers and other people at the workplace will also have duties to take reasonable care that their acts or omissions do not affect the health and safety of others. Workers can also face personal prosecution for breaches of these duties under the WHS legislation.

Lessons from the Court

In a 2010 case in the Melbourne Magistrates Court, four men and the business they worked for were fined $335,000 collectively for bullying in the workplace, following the tragic suicide of a waitress who was the victim of workplace bullying.

The three workers who were responsible for the bullying acts (which included insulting the waitress, spitting on her and pouring fish oil on her hair and clothes) were charged with failing to take reasonable care for the health and safety of persons. The owner of the café was fined $30,000 for failing to provide and maintain a safe working environment and his company was fined $220,000.

Since the introduction of the WHS legislation in 2012 across Australia (most recently in Western Australia in October 2014), the courts now have even more scope to prosecute bullying in workplaces.

In addition, in January 2014, the Fair Work Commission introduced

a new anti-bullying regime in which workers who have been bullied at work can apply to the Fair Work Commission for an order to stop the bullying.

Managing Bullying in the Workplace

Well-being in the workplace should be a focus of all businesses. Promoting well-being will assist your business and its officers to demonstrate their compliance with their respective duties under the WHS legislation, as well as create a positive workplace culture.

There are many factors that can negatively impact a worker's mental health, but the major concern across workplaces at present is bullying.

What is Workplace Bullying?

Safe Work Australia defines bullying as "repeated and unreasonable behaviour" directed towards a worker or a group of workers that creates a risk to health and safety. This definition is extremely broad and accordingly, Safe Work Australia has provided guidance about what would be considered to be bullying.

As expected, bullying includes social acts such as:

- Abusive, insulting or offensive language or comments;
- Unjustified criticism or complaints;
- Deliberately excluding someone from workplace activities;
- Spreading misinformation or malicious rumours;
- Setting unreasonable timelines or constantly changing deadlines;
- Setting tasks that are unreasonably below or beyond a person's skill level;
- Denying access to information, supervision, consultation or resources to the detriment of the worker;
- And changing work arrangements, such as rosters and leave, to deliberately inconvenience a particular worker or workers.

It is important to understand that "reasonable management action taken in a reasonable way" will not be considered bullying. Accordingly, whether or not a particular action will be considered as bullying will depend on the specific circumstances of each case.

The definition is not explicitly clear, so it is important that a business takes steps to make sure its workers are aware of what constitutes bullying for the purposes of the WHS legislation.

Steps to a Mentally Healthy Workplace

To reinforce the business' stance on bullying in the workplace, your business should have a clear bullying policy, which sets the standard of workplace behaviour that the business expects.

Your business should also:

- Communicate with workers and any health and safety representatives about establishing productive and respectful workplace relationships;
- Clearly define jobs and create safe systems of work for workers;
- Provide adequate resources, information and training required for workers to carry out their work safely;
- Periodically review the effectiveness of actions taken to prevent workplace bullying;
- And work closely with the HR and workplace safety teams in relation to issues of workers' mental health.

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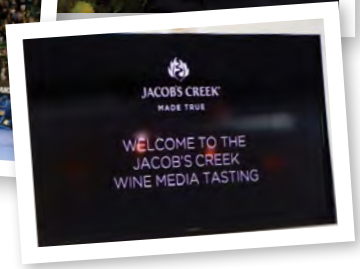
TRADE ACTIVITY

The business behind the brands

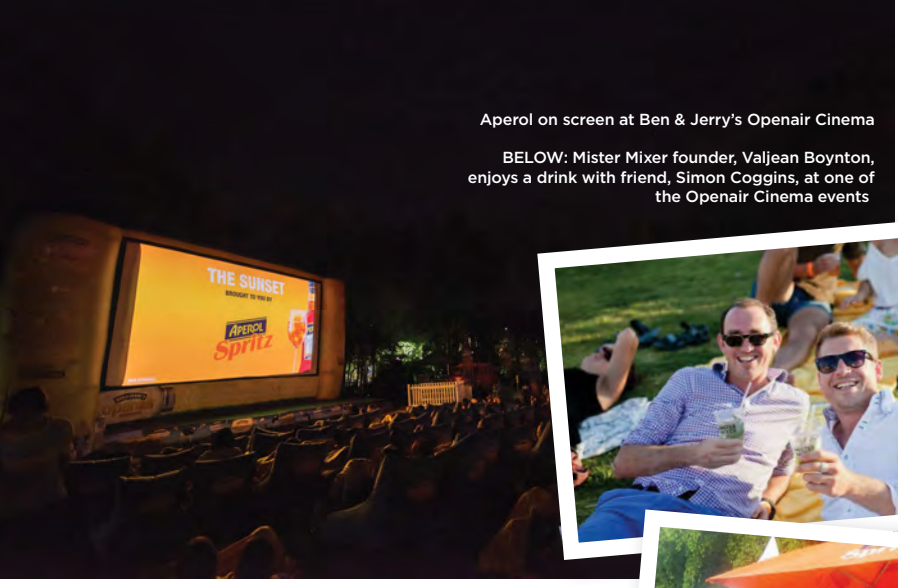
JACOB'S CREEK'S VERY OWN GLAND SLAM

At this year's Australian Open Tennis Championships, Jacob's Creek presented its full range of 51 wines in a single tasting for the first time. Inspired by their sponsorship of the Open and their new advertising campaign 'Made By', which tells the story behind the brand - celebrating its people, places and passions, the opportunity to taste across this iconic range of Australian wines was in its own way quite inspiring. Bernard Hickin, Jacob's Creek Chief Winemaker, hosted wine media courtside for the event.



MOËT & CHANDON TOASTS TO ROGER FEDERER

In January, hosted at the exclusive Chairman's Villa of Crown Towers, guests gathered to toast Moët & Chandon Brand Ambassador and tennis champion, Roger Federer, ahead of the Australian Open.
During the Moët & Chandon Tribute to Roger Federer, A-list guests experienced a special tasting of the three Moët & Chandon Vintages from the House's Grand Vintage Collection, including the 1988, 2004 and 2006, with Federer explaining how each vintage represents a successful moment in his life.
Among guests, were Terry and Anthony Minichiello, Kate Waterhouse and Luke Ricketson, Montana Cox, James Tobin, Melanie Vallejo and George Calombaris.
Moët & Chandon is an active sponsor of major international tournaments, supporting excellence in tennis and is also the official Champagne of the ATP World Tour and ATM World Tour Finals, the French Open Roland Garros and the Shanghai Rolex Masters, among others.



Aperol on screen at Ben & Jerry's Openair Cinema

BELOW: Mister Mixer founder, Valjean Boynton, enjoys a drink with friend, Simon Coggins, at one of the Openair Cinema events

BEN & JERRY'S OPENAIR CINEMA EVENTS

Drink brands Giesen, Mister Mixer, Aperol and 5 Seeds have been making their way across Australia since September, making sure consumer's glasses are topped up during the 2014/2015 season of Ben & Jerry's Openair Cinemas.

At screenings, New Zealand wine brand Giesen has been hosting tastings, as well as stocking bars with its newest release - Pomme de Gris – a blend of apple cider and pinot gris. Giesen has also been using the movie nights as an opportunity to give back to its Facebook community and to host trade.

Italian liqueur brand Aperol, has been throwing its Sunset Sessions each Friday night at screenings, offering consumers samples of Aperol Spritz, which can also be purchased at the bar. This year's season marks the second year Aperol has sponsored the event.

For Mister Mixer, the 2014/2015 Ben & Jerry's Openair Cinema marked its first national sponsorship, as the official cocktail partner of the season. As official cocktail partner, Mister Mixer has been supplying equipment, POS and branded serving accessories to bars at each of the screenings.

As for cider, this year's sponsor was Lion with 5 Seeds, pouring attendees its ice cold 5 Seeds ciders.

Drink sponsors will be at the Ben & Jerry's Openair Cinemas in Sydney, Adelaide and Perth until April, when the event series ends.

ABOVE: Fans enjoy Giesen at the Brisbane Openair Cinema

DISARONNO TERRACE CELEBRATES NEW YEARS WITH MELBOURNE

Italian liqueur brand Disaronno took its Disaronno Terrace VIP at New Year celebrations in Melbourne.

Disaronno Terrace is a year-long, global series of events, where Disaronno hosts guests at specific terrace locations around the world, with live music and Disaronno cocktails.

On New Year's Eve and New Year's Day, Disaronno Terrace popped up at Shed 14, overlooking the Docklands Harbour, with its Vegas themed 'Passport to Vegas' and 'Defected in the House' exclusive VIP sections, respectively, serving Disaronno Sours and Italian treats to a number of top music acts.

Disaronno is distributed by Suntory Australia

BRAND AMBASSADOR TAKE OVER

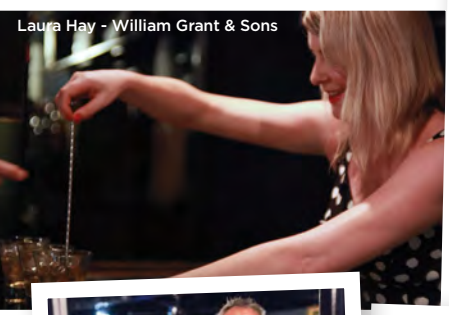
On Monday 9 Feb, industry leading Brand Ambassadors took centre stage behind the bar at The Victoria Room in Sydney in a bartender takeover. Jason Crawley, Michael Nouri, Luke Hanzlicek, Jordan Berger, Stuart Reeves, Gee David, Laura Hay, Chris Wheeler, Dylan Howarth, Nigel Weisbaum, Oliver Stuart, Ross Blainey and Christian Blair served the industry's bartending community with their signature brands and drinks, in what was an opportunity to prove if they had what it takes to match the quality of bartending in the room.

The event was sponsored by explore Drinks, which will soon be launching its online consumer platform, exploredrinks.com. Other sponsors of the night included Two Birds Brewing, Rocks Brewing Company and Bormioli Rocco.

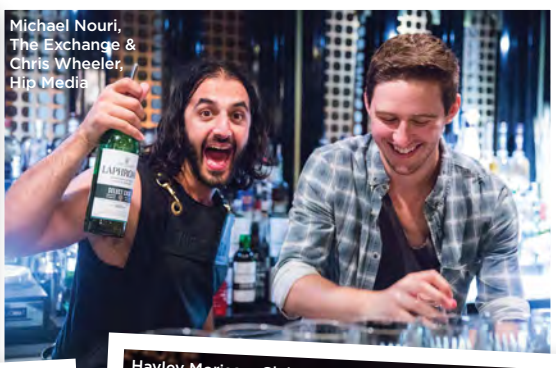
Photography supplied by Lowanna Daoud-Opit and Veronica Wood


Luke Hanzlicek - Club Suntory

Jordan Berger - Campari

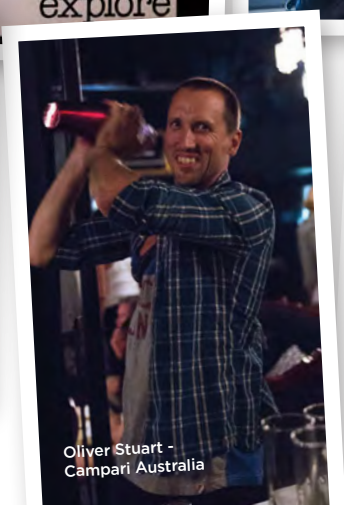

Laura Hay - William Grant & Sons

Gee David - SouthTrade


Michael Nouri, The Exchange & Chris Wheeler, Hip Media


Jason Crawley - Drinks Cabinet


Christian Blair


Oliver Stuart - Campari Australia


Hayley Morison, Club Suntory & Rhyse Borland, Eu De Vie

Yealands
WINE GROUP
NEW ZEALAND

NZ WINE PRODUCER OF THE YEAR

INTERNATIONAL WINE & SPIRIT COMPETITION
IWSC TROPHY 2014
QUALITY AWARD
New Zealand Wine Producer

YEALANDS WINE GROUP
NZ WINE PRODUCER OF THE YEAR
International Wine & Spirit Competition 2014

YEALANDS.CO.NZ CROSSROADSWINES.CO.NZ THECROSSINGS.CO.NZ

carbonZero PAS 2050 certified product
NEW ZEALAND SUSTAINABLE WINEGROWING
NZ NATIONAL SUSTAINABLE AWARDS 2014 WINNER
drinks business GREEN AWARDS 2014 GREEN COMPANY OF THE YEAR
GREEN APPLE AWARD WINNER 2014
Sustainable 60 AWARDS 2014 WINNER
INTERNATIONAL GREEN AWARDS WINNER 2012

THINK BOLDLY
TREAD LIGHTLY
AND NEVER SAY IT CAN'T BE DONE – PETER YEALANDS

FOR FURTHER INFORMATION PLEASE CONTACT YOUR YEALANDS BUSINESS DEVELOPMENT MANAGER.

EYE

BEER GOGGLES THAT TRACK PURCHASING DECISIONS AT THE BAR

A marketing lecturer has developed eye-tracking 'beer goggles' that can read how a person makes a decision when choosing a beer on tap at a bar.

The new technology shows which beer badges on tap are the most effective by measuring the number of glimpses made at a badge.

So far, research using the beer goggles has found that badges play an important role when it comes to purchase decision, particularly for non-familiar brands, but researchers say more needs to be done to find which designs best grab people's decision.

Overall, the makers behind the new technology hope that research will help brewers to gain new drinkers among growing competition.

DIAGEO VIRTUALLY OPENS ITS DOORS TO WHISKY FANS ACROSS THE WORLD WITH GOOGLE 360° TECHNOLOGY

Consumers can now explore Diageo's whisky distilleries online, via Google Business View.

Diageo is the first ever distillery to feature on Google's Business View, which allows viewers to take a 360 degree virtual tour inside the walls of four of its single malt Scotch whisky distilleries, but from the comfort of their home.

Diageo hopes the tours will encourage consumers to discover the stories behind these world-renowned brands, located in remote parts of Scotland that not all consumers would be able to travel to.

The featured distilleries include Cardhu, The Singleton of Glen Ord, Talisker and Lagavulin.

BARREL AGEING OAK WINE BOTTLE

An oak bottle created by the crowdfunding website, Kickstarter, claims to be capable of replicating the effects of ageing wine in barrels at home.

The bottle is made from European oak and has been designed to house any beverage with an ABV of at least 12%, such as wine, whisky or brandy.

Its makers claim ten days in the Pinnochio Barrique Bottle will offer the benefits of six months in an oak barrel.

If enough support is given to the crowdfunding plan, the bottle could go into production as early as April.

BRANDPATHWAY
Experts in brokering hospitality pouring agreements

NEW ON-PREMISE BROKER COMPANY

Ben Hallett, ex-NSW On-Premise Field Sales Manager at Bacardi Lion, has started the first ever business to specialise in brokering on-premise pouring contracts in Australia.

The company, Brand Pathway, aims to make pouring agreements simple, saving venues time and money, and taking over the stress and management of coming to an agreed arrangement.

"It is definitely a time consuming process if you want to do it right and with all the various brands, suppliers, personnel and pricing movements, having someone with experience who is across all stakeholder needs can really add value and profit to your business", Mr. Hallett explained.

Since establishing Brand Pathway, Mr. Hallett says suppliers have been really positive with the benefits of going through the new company.

"The feedback given when I started talking to my customers about how I could help them improve the outcomes of their pouring agreements was simple, "If you can save me time and money, I would definitely use this service". Supplier feedback has also been positive to date as often the opportunities uncovered sees new business for them, while the process itself is streamlined", Mr. Hallett added.

To find out more information, contact Ben on 0408 447 203 or at benh@brandpathway.com.au. Alternatively you can visit the Brand Pathway website, www.brandpathway.com.au

Peter
LEHMANN

FAITHFUL TO TASTE, NOT
CONVENTION SINCE 1979.

2010 Stonewell Shiraz
97 Points
in
James Halliday's Wine Companion

MADE FROM LITTLE BLACK JEWELS

peterlehmannwines.com

You Tube

MY WORD IS MY BOND

THE VODKA THAT TASTES LIKE VODKA.

Over 80 years ago, Stoli perfected Vodka. Still to this day there is no deviation from the same strict recipe of Russian wheat and Latvian artesian water, distilled only 3 times and filtered 4 times to produce the subtle, smooth Stoli taste.

Stoli®
THE VODKA

RESPONSIBLE MEASURING STARTS WITH THE VODKA.

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As you would expect from the world's fastest growing Premium Vodka, Stoli THE VODKA has great in store support. Contact your local island2island Beverage Company representative to find how you can benefit.

Australian drinks Awards®

Awards of excellence

Celebrating with **PROFESSIONALISM** and **PRIDE**

Our People, Our Brands & Our Industry

WEDNESDAY 2 SEPTEMBER 2015• SYDNEY CRICKET GROUND

Entries are open now until **15 May 2015**

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Australian drinks Awards 2015

How to Enter Terms & Conditions

Entry is open to all Manufacturers, Brand Owners, Agencies and Distributors

Entries are open from 2 February and will close on 15 May 2015 via:

http://www.australiandrinksawards.com.au

EARLY BIRD RATE APPLIES FOR ENTRIES UNTIL 31 MARCH 2015

The Major awards will cover the following five drinks' categories and Finalists or Best in Class will be selected from the thirteen sub-categories. Cider and RTD will only be evaluated on category level.

CATEGORIES	SUB-CATEGORIES
Beer	Craft Beer
	Domestic Beer
	International Beer
Cider	
RTD	
Spirits	Bourbon
	Gin
	Rum
	Vodka
	Whiskey/ Whisky
	Other Spirits
Wine	Champagne/ Sparkling Wine
	Red Wine
	White Wine
	Other Wine

The Five Major awards open for entry, include:

NAME OF AWARD	AWARD LEVEL
Most Loved Brand	Brand
Best Presence in Social Media	
Best Sales Achievement	
Best Innovation	Product/ Range
Best Ad Campaign	

A single entry fee of $900 plus GST covers the entry of:

a) One brand within one sub-category into the following award types:

NAME OF AWARD	AWARD LEVEL
Most Loved Brand	Brand
Best Presence in Social Media	
Best Sales Achievement	

AND

b) The entry of a product/range within the same brand entered in (a) into the following award types:

NAME OF AWARD	AWARD LEVEL
Best Innovation	Product/ Range
Best Ad Campaign	

c) Any additional product/ range entries in the Best Innovation and/ or Best A Campaign awards within the same brand entered in (a) will attract an additional fee of $375 plus GST. i.e. one entry in each of the two awards is included.

If you wish to opt out from a particular award, you can do so when you submit your entry.

Entries are open from 2 February and will close on 15 May 2015. Those who enter on or before the 31 March 2015 will enjoy an early bird rate of $750 plus GST.

In order to provide you with more time to prepare for your submissions this year, we will accept entries and payments upfront, even if you do not have all the supporting materials ready. After you have secured your entry, submissions can be provided separately on or before the 15 May 2015.

Before you enter, you will be required to create a username and password. This will allow you to begin the entry process. Once your entry is complete, you will be given an identification (ID) number within the tax invoice to allow you to provide supporting material post your entry. This ID number will also allow both Nielsen and the drinks association to track entries.

Best performing brands of each of the five award types within each **sub-category** will be awarded the **"Best in Class"** (across all thirteen sub-categories within Beer, Spirits and Wine).

Note: No Best in Class for Cider or RTD – all five awards will be awarded on total category level only.

PRODUCT CATEGORIES	SUB-CATEGORIES	BEST IN CLASS (BIC)*	CATEGORY WINNERS*
Beer	Craft Beer	BIC Winner	Beer Winners
	Domestic Beer	BIC Winner	
	International Beer	BIC Winner	
Cider		Cider Winners	
RTD		RTD Winners	
Spirits	Bourbon	BIC Winner	Spirits Winners
	Gin	BIC Winner	
	Rum	BIC Winner	
	Vodka	BIC Winner	
	Whiskey/ Whisky	BIC Winner	
	Other Spirits	BIC Winner	
Wine	Champagne/ Sparkling Wine	BIC Winner	Wine Winners
	Red Wine	BIC Winner	
	White Wine	BIC Winner	
	Other Wine	BIC Winner	

** Five Best in Class awards will be awarded within each sub-category:*

NAME OF AWARD	AWARD LEVEL
Most Loved Brand	Brand
Best Presence in Social Media	
Best Sales Achievement	
Best Innovation	Product/ Range
Best Ad Campaign	

All Best in Class winners will be the finalists for the Category awards for the respective award type. For example, the Best in Class winners for the Most Loved Brand awards for the sub-categories Craft Beer, Domestic Beer and International Beer will all be finalists for the Most Loved Brand Winner under the category Beer.

Winners of each award within each category will be the winners of the Australian drinks Awards 2015 (altogether 31 awards across 5 categories):

AWARD TYPE	CATEGORY WINNERS	ONE OVERALL WINNER ACROSS ALL CATEGORIES FOR EACH AWARD	ONE BRAND OF THE YEAR
Most Loved Brand	Beer	Overall Most Loved Brand	Brand of the Year
	Cider		
	RTD		
	Spirits		
	Wine		
Best Presence in Social Media	Beer	Overall Best Presence in Social Media	
	Cider		
	RTD		
	Spirits		
	Wine		
Best Sales Achievement	Beer	Overall Best Sales Achievement	
	Cider		
	RTD		
	Spirits		
	Wine		
Best Innovation	Beer	Overall Best Innovation	
	Cider		
	RTD		
	Spirits		
	Wine		
Best Ad Campaign	Beer	Overall Best Ad Campaign	
	Cider		
	RTD		
	Spirits		
	Wine		

All award winners will be announced at the awards evening on the 2 September 2015 at the Sydney Cricket Ground and may use the Australian drinks Awards 2015 logo from September 2015 to August 2016.

All awards for all categories will be evaluated based on the brand or products' performance over a fifteen month period, between the 1 January 2014 to 31 March 2015. For the Best Innovation award, the product must be launched or have demonstrated innovation during this time period.

Your supporting material must include:

- Your brand logo (preferably in jpg/ png formats)
- An essay between 150 to 350 words on your brand relative to the respective award

For Best Innovation and Best Ad Campaign awards,

- Pack shots of your product (preferably in jpg/ png formats)

For the Best Ad Campaign award,

- Your advertising/ marketing information (for audio/ video files, preferably in mp3/ mp4 formats)

For the Best Sales Achievement award, data needs to be submitted in the following format to be considered:

Example

SUB-CATEGORY: Domestic Beer BRAND: Brand A	TOTAL SALES IN 000'S LITRES
1 January 2013 through to 31 March 2014	10,000
1 January 2014 through to 31 March 2015	13,000

Detailed requirements to be eligible for the Best Sales Achievement award:

- Market: Total domestic (Australia) sales, on and off premise, excluding duty-free and exports
- Product: Total brand as defined in the entry
- Sales: 000' litres
- Time Frames: Total sales 1 January 2013 through to 31 March 2014
  Total sales 1 January 2014 through to 31 March 2015
- Disclaimers: By sending through the data for the Best Sales Achievement award, you acknowledge that to the best of your knowledge that the data is accurate, true and correct and you will authorise Nielsen to verify the data against other independent data sources including, but not limited to, the drinks association total market read.
- Nielsen declares that the information provided will be strictly confidential and will be used exclusively for the Best Sales Achievement award only. At the conclusion of the awards, all records of the sales data will be deleted.

MOST LOVED BRAND

Selection Criteria

- **Awareness:** This attribute will uncover which brand has the highest recall/awareness in the category and will be based on 2 questions:
    - **Top of Mind:** Specifically thinking on a brand level, what is the first brand that comes to mind when you think about Spirit/RTD/Beer/Wine/Cider? Please type in the name of only one brand in the box below. (Open Ended Question / Single Answer)
    - **Total Prompted Awareness:** Looking at the list of brands of Spirit/RTD/Beer/ Wine/Cider shown below, please tick all brands that you recognise, even if you have already mentioned them in previous questions. (Close Ended Question / Multiple Answer)
- **Consideration:** This attribute will measure the power of persuasion (pull) and rejection (push) of each brand within the category.
    - **Consider Buying:** For each of the following brands of Spirit/RTD/Beer/Wine/ Cider, please indicate which brands you would consider buying in the future. (Close Ended Question / Multiple Answer)
    - **Not Consider Buying:** For each of the following brands of Spirit/RTD/Beer/Wine/Cider, please indicate which brands you would not consider buying in the future. (Close Ended Question / Multiple Answer)
- **Preference:** This attribute will determine what the consumer's favourite brand is.
    - **Brand Preference:** Amongst the Spirit/RTD/Beer/Wine/Cider that you recognised, which is your favourite brand? It may or may not be the brand you use/buy most often. (Close Ended Question / Single Answer)
- **Recommendation:** This attribute aims to uncover which brand has the highest level of advocacy within the category.
    - **Brand Recommendation:** Which is the one brand you would recommend to others? (Close Ended Question / Single Answer)
- **Willingness to Pay Price Premium:** This attribute will determine the brand with the highest value perception.
    - **Brand Recommendation:** For each of the Spirit/RTD/Beer/Wine/Cider brands below, please choose the statement that best describes how you feel about buying them. I would buy… [Single Answer] (Close Ended Question / Single Answer)

At whatever cost	Even if it costs more than any other brand	Even if it costs a lot more than the cheapest brand	Even if it costs a bit more than the cheapest brand	Only if it costs the same as the cheapest brand	I wouldn't buy it at all	I Don't Know

BEST PRESENCE IN SOCIAL MEDIA

Selection Criteria

Social media is defined as the interactions among people in which they create, share, exchange and comment amongst themselves in virtual communities and networks. Through multiple social media monitoring sites, we are able to monitor over 185 million social media sites including boards, blogs, blog comments, groups, Facebook and Twitter.

The following attributes will determine the winner of the Best Presence in Social Media Award:

- **Volume:** This attribute will measure the amount of social media messages/mentions for a brand over 2014 (or a certain period of time) and rank the brands accordingly
- **Sentiment:** This attribute will measure the positive, negative and neutral sentiment for each of the brands and determine a net sentiment score which will rank the brands. A random sample of messages for each brands will be read manually to ensure 100% accuracy of the sentiment score.
- **Dispersion:** This attribute will measure the dispersion of sites used to discuss each of the brands in order to determine the reach of each of the brands.

***NOTE: This award does not go to panel, jury nor Consumer Survey*

BEST SALES ACHIEVEMENT

Selection Criteria

We will be evaluating the brands within each sub-category and determine the winner based on the highest incremental volume in a pre-determined period of time.

Since Scan-data will no longer be available, each participant will have to inform their incremental volumetric (litres) sales from the last 15 months vs. the previous 15 months at the submission stage.

Requirements of the submission: The following data needs to be submitted for the brand to be considered in the 'Best Sales Achievement Awards':

- **Market:** Total domestic (Australia) sales, on and off premise, excluding duty-free and exports

***NOTE: This award does not go to panel, jury nor Consumer Survey*

BEST INNOVATION

Selection Criteria

- **Relevance:** This attribute will determine how relevant or important (does it solve a need?) each new product is to consumers.

- **Uniqueness:** This attribute will uncover how different and unique each new product is to consumers. We aim to identify 'breakthrough ideas' vs 'me too products'.

How much do you think each of the following statements applies to the product you have just seen? You can use any score between 1 and 7, 1 being the least applicable and 7 being the most applicable.

This product is relevant to you

APPLIES COMPLETELY **DOESN'T APPLY AT ALL**

1 2 3 4 5 6 7

This product is unique and different from other products of this type

APPLIES COMPLETELY **DOESN'T APPLY AT ALL**

1 2 3 4 5 6 7

- **Excitement:** This attribute aims to measure the 'buzz' generated by each new product and is based on the excitement to talk about this product with others.

  - On a 7 points scale where 1 means 'not excited at all' and 7 means 'very excited', how excited are you to use this product and to talk about it with your friends? (Close Ended Question / Single Answer)

NOT EXCITED AT ALL **VERY EXCITED**

1 2 3 4 5 6 7

- **Purchase Intent:** This attribute will rate the products with the highest appeal in terms of purchase intent.

  - How likely are you buy this product in the next 6 months? (Close Ended Question / Single Answer)

I definitely will not buy it	I probably will not buy it	I cannot say either way	I probably will buy it	I definitely will buy it

BEST AD CAMPAIGN [PART A]

Selection Criteria

- **Impact:** This attribute will determine which Ad stands out from competitive initiatives. Impact is not just about being attention grabbing; it also determines uniqueness to market.

  Impact is based on the following measures:
  - **Ad Visibility:** % of consumers who have viewed the Ad
  - **Brand Recognition:** % of respondents who had the correct recall
  - **Ad Uniqueness:** Differentiation from other brand Ads (Agreement Scale – 7 points)

- **Empathy:** This attribute will determine which Advertising has the best performance and strengthens brand affinity. Successful connection or empathy requires more than just liking. The Ad must also be relevant and have a positive effect on the consumer's overall impression of the brand.

  Empathy is based on the following measures:
  - **Relevance:** % of respondents who agree with the following statement: 'This Ad isrelevant to me as an individual' (Top 2 Box – 7 point scale)
  - **Absolute Likeability:** % of respondents who like the Ad (Top 2 Box – 5 point scale)
  - **Relative Likeability:** % of respondents who like the Ad more than most category Ads

- **Communication:** To determine which Ad best communicates the intended message and desired imagery. Communication measures how well the desired associations of brand image and intended message are received.

  Communication is based on the following measures:
  - **Comprehension:** % of respondents who believe 'most people would find this Ad easy to follow'
  - **Main Message:** % of respondents who agree with the message

BEST AD CAMPAIGN [PART B]

Selection Criteria

- **Persuasion:** This attribute will identify which Ad has the highest influence on consumer's purchase decision within the category. Persuasion examines the desire to purchase, as well as associated measures such as willingness to pay after seeing the Ad.

  Persuasion is based on the following measures:
  - **Ad Sentiment:** % of respondents who agree with the following statement: 'This Ad makes me feel happier or more comfortable about buying the brand' (Top 2 Box – 5 point scale)
  - **Active or Passive Interest:** % of respondents with active interest towards the brand

ACTIVE OR PASSIVE INTEREST TOWARDS BRANDS
ABOVE AVERAGE CRITERIA
It definitely made me want to buy that brand
It sounded interesting and I wanted to tell others about it
I wanted to try and find out more about it
This is just what I had been looking for
AVERAGE CRITERIA
The ad reminded me about the brand
I've never quite thought about the brand like that before, that's something new
BELOW AVERAGE CRITERIA
That's just how I've always seen the brand
None of the above

BRAND OF THE YEAR

Selection Criteria

The Brand of the Year in the Australian drinks Awards is the one that performs best across all five award types.

- To be eligible, the Brand of the Year must be one of the winners of at least one of the five major Overall Awards – Most Loved Brand, Best Presence in Social Media, Best Sales Achievement, Best Innovation and Best Ad Campaign. There will be a maximum number of five finalists.

- Of these five finalists, the Brand of the Year will be determined by the following criteria:

    - number of awards entered – brands are encouraged to enter all five awards as performance in each award will be taken into consideration

    - the best average performance across all five awards – The Brand with the highest performance across the 5 awards will be nominated the Brand Of the Year (The Best of the Best).

SUPPLIER OF THE YEAR

Selection Criteria

Each year, Advantage calculate the best performing combined Net Favourable score across all channels and all Organisational Capabilities scored in the program. These are as follows:

- Business Relationship
- Personnel
- Category Development
- Brand Marketing
- Trade Marketing
- Supply Chain
- Customer Service

This score is a roll-up at a Total Trades level, of Overall Net favourable Performance, calculated independently from each capability measure, and is the used to determine the overall winner of the Supplier of the Year

This result, highlights outstanding overall performance as rated and scored by all Retail participants in the Advantage Program.

In scoring Supplier of the Year, the report shows Organisational Capability delivery that is rated as being consistently strong across all capabilities a s highlighted by Net Favourable score across all channels.


Australian
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