

Appendix 2

MP1 Wine Industry Strategic Plan Report

WGGA Capacity Building Project

Major Project 1: WGGA and a Wine Industry Strategic Plan

Initial Report – Gap Analysis and Recommendations

Prepared for : Wine Grape Growers' Australia (WGGA)

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Date : 13 May 2008



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Glossary

AAA	Agriculture – Advancing Australia (a program administered by DAFF)
AWBC	Australian Wine and Brandy Corporation
DAFF	Department of Agriculture, Forestry and Fisheries
ESD	Ecologically sustainable Development
GWRDC	Grape and Wine Research & Development Corporation
R&D	Research and Development
RD&E	Research, Development and Extension
SDG	Strategic Directions Group
WFA	Winemakers’ Federation of Australia
WGGA	Wine Grape Growers’ Australia

1 INTRODUCTION

This report is the initial report for Part 1 of Major Project 1 of the Capacity Building for Australian Wine Grape Growers Project, funded by the Australian Government through the Industry Partnerships Program managed by the Department of Agriculture, Fisheries and Forestry (DAFF). Major Project 1 was headed ‘Wine Industry Strategic Plan’ in the Project Specification – Briefing Notes.

This project emanated from ‘The Australian Wine Grape Industry Taking Stock and Setting Directions Final Report, December 2006’ which was prepared by Kiri-ganai Research Pty Ltd for Wine Grape Growers Australia (WGGA) under the Industry Partnerships Programme and is referred to in this report as the ‘TSSD Report’.

1.1 Initial Brief

The following project brief for Part 1 of Major Project 1 is extracted and summarised from the original briefing notes.

The project was defined as to ‘Develop an all-of-wine-industry strategic plan by linking the existing plans for wine grape growers and wine producers. This will require:

- reviewing the WGGA TSSD Report and Wine Australia: Directions to 2025
- identifying synergies, linkages and inconsistencies between the plans
- developing a document that links the two plans – this will be called the joint strategy.’

1.2 Revised Brief

The review of national organisational structures¹ has not yet resulted in an agreed body or an agreed responsibility to have carriage of the joint strategy identified in the original brief. Consequently, having reviewed a draft report, the project steering committee at a meeting on 8 May 2008, agreed that the brief for Part 1 of Major Project 1 be revised as follows:

- To summarise the WGGA TSSD Report, Wine Australia: Directions to 2025, and the Strategic Directions Report² (SDG);
- To identify synergies, linkages and inconsistencies and finalise gap analysis of Directions 2025, TSSD and SDG to form the basis of a consolidated report from the WGGA perspective; and
- To formulate recommendations for WGGA regarding an industry strategy.

This report responds to the revised brief.

¹ The NOS review.

² Strategic Directions Group – Research Prospectus 2006; plus 2008 R&D Prospectus Update.

2 GAP ANALYSIS

2.1 Reports Analysed

The report 'Wine Australia: Directions to 2025' was published in May 2007 by the Australian Wine and Brandy Corporation (AWBC) and the Winemakers' Federation of Australia (WFA) and is referred to in this report as 'Directions 2025'.

The report 'The Australian Wine Grape Industry Taking Stock and Setting Directions Final Report, December 2006' was prepared by Kiri-ganai Research for WGGGA under the Industry Partnerships Programme and is referred to in this report as the 'TSSD Report'.

A gap analysis of the above two reports was included in the original brief and is fundamental to the project. The 2006 research prospectus and the draft 2008 update produced by the Strategic Directions Group (SDG) will be considered and any major gaps or inconsistencies will be described and incorporated in the gap analysis.

2.2 Prior Gap Analysis

An initial gap analysis conducted by Dr Erika Winter, SDG Executive Officer focussed on the SDG priorities and the GWRDC program structure and Five Year R&D Plan 2007-2012 with some analysis of Directions 2025 and TSSD and was provided as background for this report.

2.3 Structure of the Gap Analysis

The SDG priorities and the GWRDC programs and plan have been loosely structured around the wine industry value chain. Directions 2025 and TSSD are less consistent with the value chain or value chain structure, but it still appears to be a useful basis for the gap analysis. A further useful structure is the framework developed as the basis for the Signposts for Agriculture project³ which reviews the contribution of the Wine industry (and five other industries) to ecologically sustainable development (ESD). Both frameworks are discussed below.

2.3.1 Value Chain Approach

Relevance to WGGGA requires that gap analysis of the above reports should be informed by the relative place of winegrape growers in the value chain. A simplified model of the value chain is shown in Figure 1 below.

Continued prosperity and development of the Australian wine industry requires continued improvement in productivity of each component of the value chain and the value chain as a whole, as well as minimisation of transaction costs between components of the value chain. Productivity improvement and minimisation of transaction costs require effective research, development, extension and technology transfer, as well as industry advocacy to government to ensure provision of a positive regulatory and commercial environment.

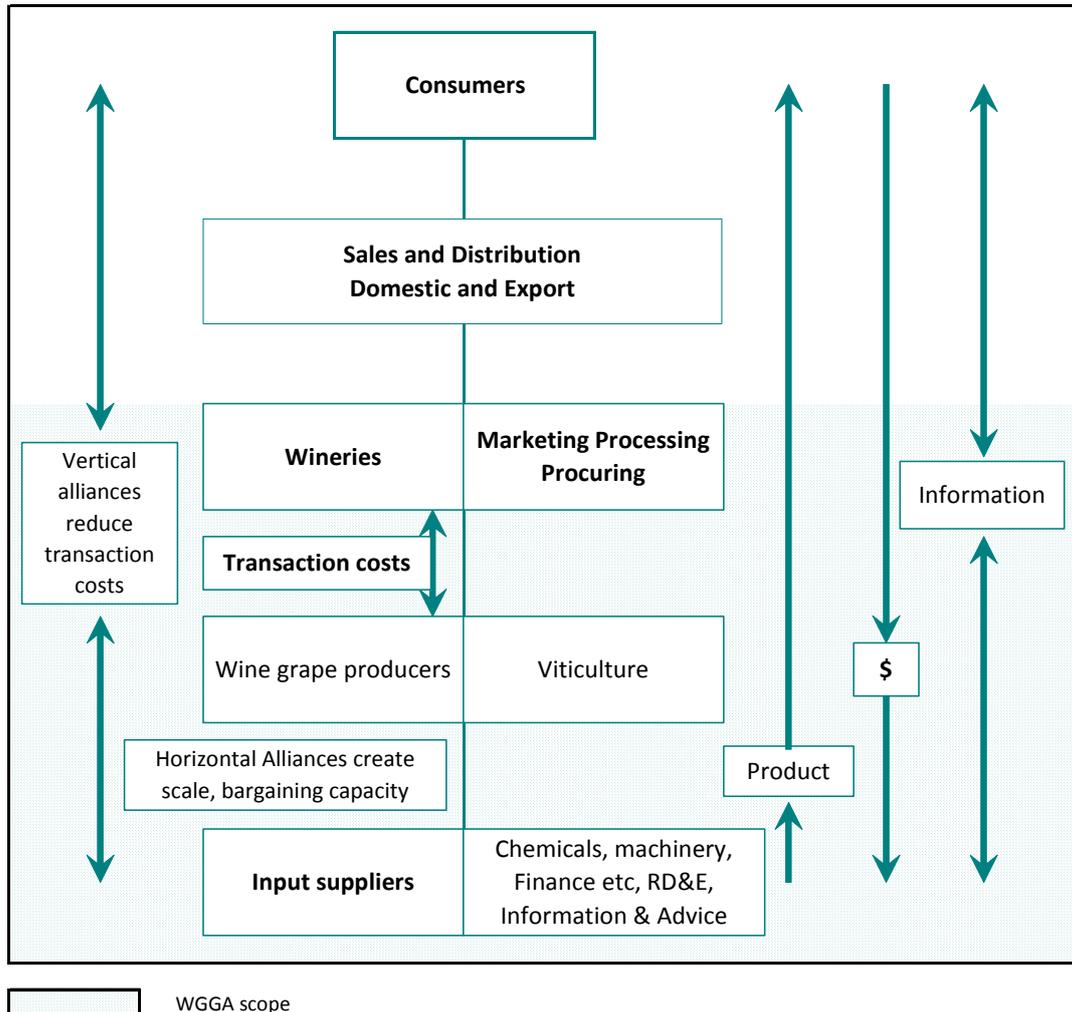
The wine industry value chain cannot be considered in isolation. It is in an economic, biophysical and social environment, all of which interact with the wine industry – they affect and are affected by the wine industry. It is signified by the rectangular boundary around the value chain.

The shaded area defines the part of the value chain that is a legitimate focus of strategy development for WGGGA. This includes the procuring and processing and to a lesser extent the marketing functions of the wineries, as well as the input suppliers which service all parts of the

³ See http://www.nlwra.gov.au/Natural_Resource_Topics/Signposts_for_Australian_Agriculture/index.aspx

chain. It also includes vertical and horizontal alliances, transaction costs between components and the flows of product, dollars and information shown on the right hand side of the figure.

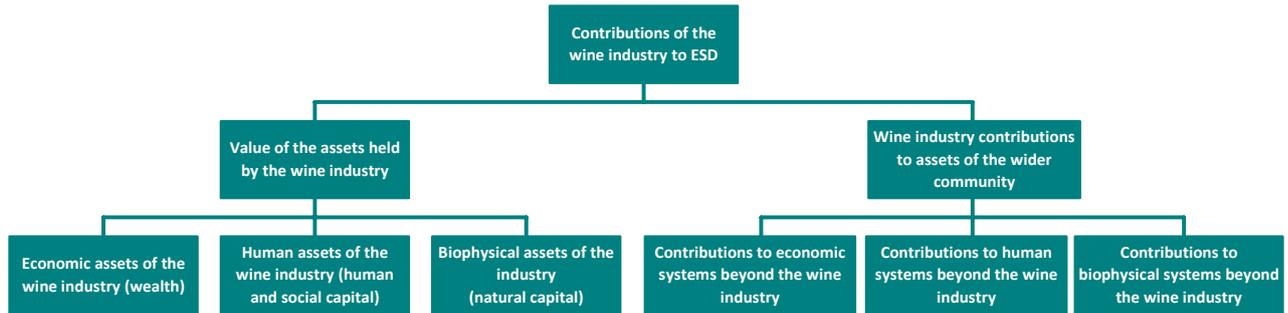
Figure 1 : Value Chain for the Wine industry



2.3.2 Signposts for Agriculture

Continued prosperity and development of the Australian wine industry must be sustainable. Ecologically sustainable development (ESD) of the wine industry requires economic, environmental and human/social sustainability, commonly referred to as the “triple bottom line” approach. Maintenance or improvement of the value of the economic, environmental and human/social assets of the wine industry as well as those assets held beyond the industry (ie of the wider community) is critical to sustainability. The Signposts framework has been developed to demonstrate the contribution of the wine industry to ecologically sustainable development. It is based on the idea that ESD leads to an increase in the value of industry assets (economic, human and biophysical) and that the effects of the wine industry flow to the wider community comprising economic, human and biophysical systems. The Signposts framework is shown in Figure 2 below.

Figure 2 : Signposts Framework for the Wine Industry



2.3.3 Conclusion

Comparison of the reports listed above with the value chain, particularly the shaded part relevant to WGGGA supplemented by consideration of triple bottom line approach as shown in the Signposts framework provide a comprehensive structure for the gap analysis and for the development of strategic recommendations for WGGGA.

3 DIRECTIONS TO 2025

3.1 Introduction

The report ‘Wine Australia: Directions to 2025 – An Industry Strategy for Sustainable Success’ published in May 2007 was developed as a joint initiative of the AWBC and WFA and the process was overseen by a task force representing wine producers, grape growers and sector organisations appointed in February 2006. Directions 2025 followed the Strategy 2025 document published in a substantially different environment in 1996. Directions 2025 aims to represent the ‘best opportunity to secure the future of Australian wine through economic prosperity, environmental sustainability, technological innovation and social responsibility’.

3.2 Strategic Framework

Directions 2025 focuses primarily on wine producers but stated that it took account of TSSD prepared for the wine grape growing sector. The framework of Directions 2025 is shown in Table 1 below.

Table 1 : Directions to 2025 – Strategic Framework

2006-07 Directions Perspective	2007-2025 New Directions to 2025
Vision of Market Opportunity	Anticipating the market: 1. Understanding and use of global market intelligence 2. Leadership in Research and Development for vine to consumer 3. Closer alignment of between sector organisations to support market development
Market driven strategy	Influencing the consumer: 4. Successful adoption of Wine Australia brand segmentation 5. New expectations for regional and fine wine 6. New consumer and market creation through innovation and communication
Focus on returning value	Building sustainable success: 7. Partnerships with government sector 8. Continuous improvement in business skills and practice 9. Continuous improvement in environmental performance 10. Emphasis on ensuring widespread social responsibility

The individual strategic directions are numbered 1 to 10 and a range of responses to each are identified and described in the report.

4 TAKING STOCK AND SETTING DIRECTIONS

4.1 Introduction

The TSSD Final Report December 2006 was prepared by Kiri-ganai research for WGGA under the Industry Partnerships Programme. This was part of the Agriculture – Advancing Australia (AAA) package aimed at helping primary industries to become more competitive, profitable, sustainable, resilient and self-reliant. The purpose of the TSSD project was to analyse the industry’s current performance and situation, identify likely challenges and opportunities, and to set strategies for its future profitability and sustainability.

4.2 Desired Outcomes and Issues

The TSSD report assessed the industry⁴ against five desired outcomes – competitiveness, sustainability, profitability, resilience and self reliance. Issues relevant to achieving success in each outcome were identified as shown in Table 2 below.

Table 2 : Desired Outcomes and Relevant Issues

Desired Outcomes	Relevant Issues
1 Competitiveness	<ol style="list-style-type: none"> 1. Maintain export success 2. Benchmark all components of the wine industry value chain 3. Research and adopt new business models for grape growing
2 Profitability	<ol style="list-style-type: none"> 1. Establish effective industry strategic planning and information services 2. Improve mutual understanding of businesses in each component of the value chain 3. Achieve appropriate economies of scale and cost reduction in grape production and marketing
3 Sustainability	<ol style="list-style-type: none"> 1. Undertake major structural adjustment 2. Establish a culture of continuous improvement and innovation 3. Monitor the impact of climate variability on irrigation water availability and cost 4. Implement best practice natural resource management 5. Monitor climate change and formulate response strategies
4 Resilience	<ol style="list-style-type: none"> 1. Improve information collection, analysis and reporting to support grower decision making 2. Develop planning and strategy setting processes linked to wine marketing strategies 3. Ensure ongoing investment in industry human, financial and capital capacity 4. Establish and maintain collaborative relationships between all components of the value chain
5 Self-reliance	<ol style="list-style-type: none"> 1. Consolidate WGGA as a strong and effective national organisation representing wine grape growers 2. Coordinate industry representative structure at all levels; resolve funding and resourcing constraints 3. Develop industry leadership 4. Improve capacity for policy development; strengthen relationships with government

4.3 Strategic Imperatives

Consideration of these issues enabled TSSD to identify 5 strategic imperatives in order to achieve the desired outcomes. The strategic imperatives and their component strategies are summarised in Table 3 below.

⁴ The TSSD report did not consistently differentiate wine grape growing as a component of the Australian wine industry value chain.

Table 3 : Strategic Imperatives and Component Strategies

Strategic Imperatives	Component Strategies
1 Market Information	<ol style="list-style-type: none"> 1. Refine industry data collection re supply and demand 2. Improve interpretation and dissemination of industry information 3. Analyse and distribute information on industry trends and cycles 4. Monitor and review investment in new vineyards 5. Highlight the contribution of grape growers to the wine industry and its global competitiveness 6. Contribute wine grape sector information to industry marketing strategies 7. Implement integrated industry strategic planning, monitoring, evaluation
2 Business competitiveness	<ol style="list-style-type: none"> 1. Review and respond to requirements for new business skills development 2. Benchmark Australian viticulture to world's best practice 3. Encourage vineyard upgrading in response to benchmarking 4. Research profitable grower business models 5. Identify and facilitate support for adoption of selected business models 6. Provide information on economies of scale and cost reduction 7. Develop and implement a WGGA policy on R&D and innovation 8. Establish a representative grower priorities review group for R&D priorities
3 Industry Change	<ol style="list-style-type: none"> 1. Investigate, develop and implement strategies for structural change 2. Facilitate grower understanding and use of Government support programs 3. Monitor industry human resource capacity and increase attractiveness 4. Improve infrastructure for grape delivery to wineries 5. Improve information flow to growers on changes in irrigation water availability and cost 6. Facilitate investment in irrigation infrastructure 7. Support adoption of irrigation BMPs 8. Develop world NRM BMPs; identify Government funded opportunities 9. Monitor climate change impacts and develop response strategies
4 Relationships	<ol style="list-style-type: none"> 1. Establish value chain networks that focus cooperatively on issues 2. Develop government relationships to enhance industry policy development
5 Representation and Leadership	<ol style="list-style-type: none"> 1. Build a national WGGA with effective links to state and regional bodies 2. Address funding and resourcing issues at all levels 3. Develop strategic alliances with industry stakeholders to provide more resources to benefit the wine grape sector 4. Provide wine grape sector leadership to manage change

5 SDG RESEARCH PROSPECTUS 2006 AND UPDATE

5.1 Introduction

In January 2005, WFA, GWRDC and WGGA established a Strategic Directions Group (SDG), comprising a skills-based membership drawn from across the industry. The purpose of the SDG is to help identify priorities for R&D in the Australian Wine Industry. The SDG is required to prepare and release an R&D Prospectus for the industry each three years, and to update the Prospectus as necessary in the intervening periods.

The SDG released a Research Prospectus for the Australian Wine Industry in early 2006⁵. This identified 11 topics where the SDG considered that more R&D is required, and presented opportunities for co-funding to grow the total wine industry R&D effort.

The SDG has now prepared a draft Update of the 2006 R&D Prospectus, to reflect the progress made in addressing the 11 priority topics, to address the changed circumstances of the industry and the challenges now facing it, and to take account of the recent industry reviews Directions 2025 and TSSD.

⁵ Investing in Innovation: A Research Prospectus for the Australian Wine Industry 2006-2008, available at www.wfa.org.au

5.2 Initial Priority R&D topics

The 2006 Prospectus identified 11 priority R&D topics within 6 groups as shown in Table 4 below.

Table 4 : SDG 2006 – Priority R&D topics

Group	Topics
Growing our grapes	Monitoring and preserving grape quality Managing vineyards to produce quality grapes
Making the wine	Excellence in winemaking technology Innovation on winemaking microbiology Monitoring and manipulating wine quality
Getting our products to consumers	Presentation and distribution of wine
Optimal marketing and legal and regulatory compliance	Legal and regulatory issues
Knowing our consumers	Wine and society Wine drinker's preferences Wine buyer's behaviour
Industry –wide issues: environmental management	Sustainability of all industry processes

SDG 2006 also identified that many of the above topics were interrelated.

5.3 2008 R&D Prospectus Update

The update process comprised identification of new and ongoing challenges, and the ranking of R&D topics using 3 criteria - attractiveness, feasibility and adoption. The results of the ranking are shown in Table 5 below.

Table 5 : Priority Topics – 2008

Priority Rank	Topic
1	Environmental sustainability
2	Climate change
3	Winery innovation
Equal 4	Germplasm
Equal 4	Risk Assessments
Equal 4	Vineyard innovation
7	Packaging and transport
8	Markets and regulations
9	Alternative production systems

6 SYNERGY IDENTIFICATION AND GAP ANALYSIS

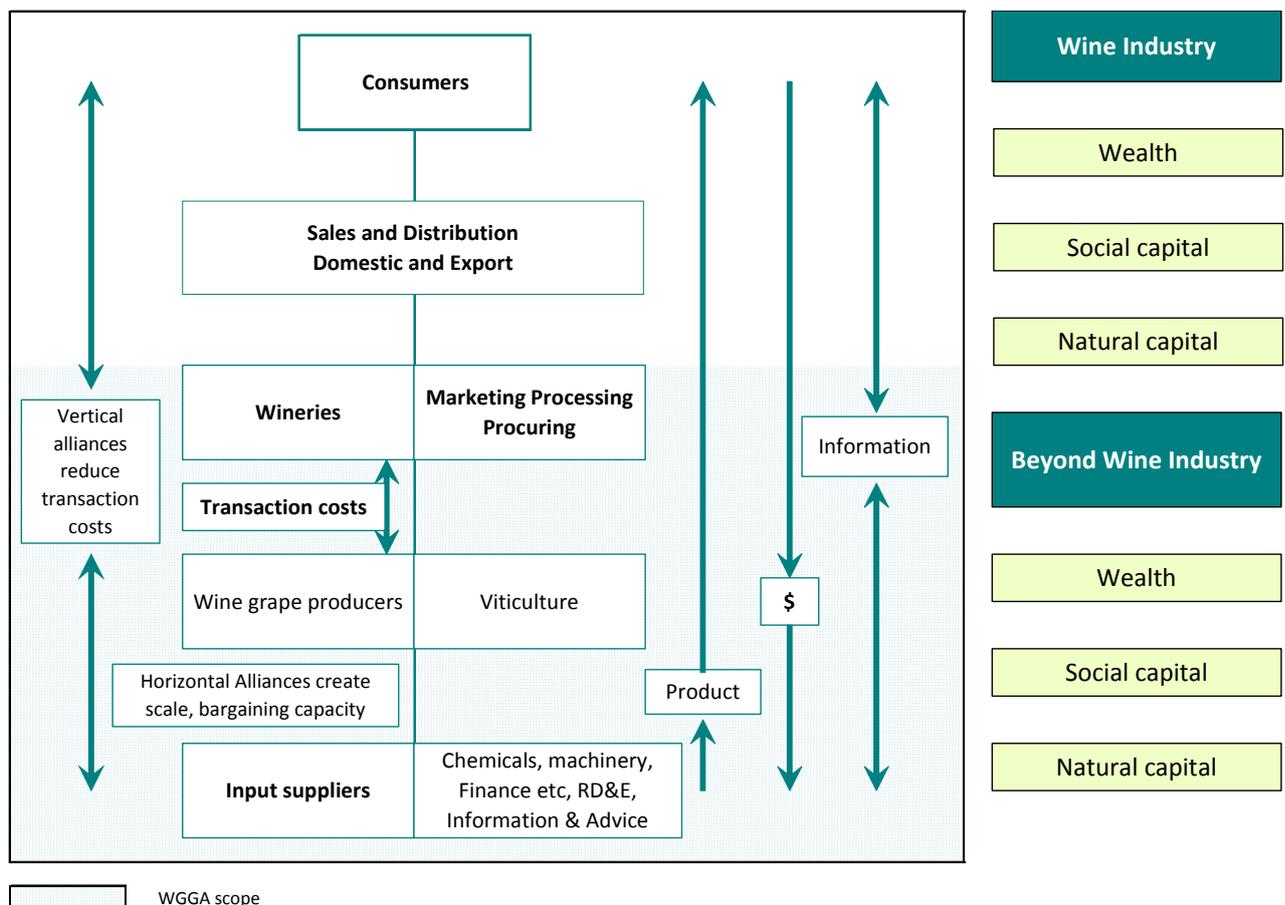
6.1 Aim and Process

The aim of synergy identification is to show which TSSD component strategies may benefit from joint development and implementation. The process starts by assessing the relevance of the directions specified in Direction 2025 to each of the component strategies identified in TSSD. This facilitates identification of those TSSD component strategies the implementation of which may benefit from synergies with individual directions specified in Directions 2025. It also clearly identifies TSSD component strategies that are not relevant to Directions 2025 and thus can not be synergistic.

The aim of the gap analysis is to identify desired outcomes, strategic imperatives, strategies and topics that, from the WGGA perspective should be included in an industry strategic plan, and are not identified or are inadequately specified in the above reports. Recommendations addressing the identified gaps in a future strategic plan will be formulated.

The gap analysis uses the value chain and the Signposts framework described in Section 2.3 above and in combination as shown in Figure 3 below.

Figure 3 : Value Chain and Signposts Framework



I have assumed that the starting point for development of an industry strategic plan from the WGGA perspective is the TSSD report and its 5 desired outcomes – global competitiveness, profitability, sustainability, resilience, and self reliance.

Global competitiveness refers to the competitiveness of the value chain as a whole compared with other wine producing countries and other competitors for the leisure/beverage dollar.

Profitability refers to each component of the value chain and is affected by efficiency and productivity within the component and the transaction costs between the components.

Sustainability refers to the triple bottom line approach for the chain as a whole and each component.

Resilience refers to the robustness and ability to respond to changes in the economic, social and biophysical environment of the chain and each of the components.

Self reliance refers to the extent to which the chain and each of its components can influence factors affecting its sustainability.

Topics identified in the review of the documents from the perspective of the value chain and the signposts framework, as lacking or inadequately specified and those which provide or enable synergy are described below.

6.2 Relevance of Directions 2025 to TSSD

The relevance of directions specified in Directions 2025 to TSSD component strategies and the likely synergy levels have been assessed and the results are shown in Table 6 below.

Table 6 : Relevance of Direction 2025 to TSSD Component Strategies

TSSD - Component Strategy	Directions 2025 - Relevant Direction		Synergy level
Strategic Imperative - Market information			
1 Refine industry data collection re supply and demand	1 Global Market Intelligence	3 Closer alignment	Medium
2 Improve interpretation and dissemination of industry information	1 Global Market Intelligence	3 Closer alignment	Medium
3 Analyse and distribute information on industry trends and cycles	1 Global Market Intelligence	3 Closer alignment	Medium
4 Monitor and review investment in new vineyards	3 Closer sector alignment		Low
5 Highlight the contribution of grape growers to the wine industry and its global competitiveness	3 Closer sector alignment		Low
6 Contribute wine grape sector information to industry marketing strategies	3 Closer sector alignment		Medium
7 Implement integrated industry strategic planning, monitoring, evaluation	3 Closer sector alignment		High
Strategic Imperative - Business Competitiveness			
1 Review and respond to requirements for new business skills development	8 Business skills and practice	9 Environmental performance	Low
2 Benchmark Australian viticulture to world's best practice	8 Business skills and practice	9 Environmental performance	Low
3 Encourage vineyard upgrading in response to benchmarking	8 Business skills and practice	9 Environmental performance	Low
4 Research profitable grower business models	8 Business skills and practice		Low
5 Identify and facilitate support for adoption of selected business models	8 Business skills and practice		Low
6 Provide information on economies of scale and cost reduction	8 Business skills and practice		Low
7 Develop and implement a WGGA policy on R&D and innovation	2 Leadership in R&D		Low
8 Establish a representative grower priorities review group for R&D priorities	2 Leadership in R&D		Low
Strategic Imperative - Industry Change			
1 Investigate, develop and implement strategies for structural change	Nil		Nil
2 Facilitate grower understanding and use of Government support programs	7 Partnerships with Govt		Nil
3 Monitor industry human resource capacity and increase attractiveness	Nil		Low
4 Improve infrastructure for grape delivery to wineries	8 Business skills and practice		Medium/High
5 Improve information flow to growers on changes in irrigation water availability and cost	9 Environmental performance		Low
6 Facilitate investment in irrigation infrastructure	9 Environmental performance		Low
7 Support adoption of irrigation BMPs	9 Environmental performance		Low
8 Develop world NRM BMPs; identify Government funded opportunities	9 Environmental performance	7 Partnerships with Govt	Medium
9 Monitor climate change impacts and develop response strategies	9 Environmental performance		Medium
Strategic Imperative - Relationships			
1 Establish value chain networks that focus cooperatively on issues	3 Closer sector alignment	8 Business skills and practice	High
2 Develop government relationships to enhance industry policy development	7 Partnerships with Govt		Medium
Strategic Imperative - Representation, Leadership			
1 Build a national WGGA with effective links to state and regional bodies	Nil		Nil
2 Address funding and resourcing issues at all levels	Nil		Medium
3 Develop strategic alliances with industry stakeholders to provide more resources to benefit the wine grape sector	3 Closer sector alignment		Medium
4 Provide wine grape sector leadership to manage change	8 Business skills and practice	9 Environmental performance	Medium

Table 6 clearly shows that for most of the component strategies in TSSD, there are relevant directions identified in Directions 2025. These are the component strategies that when being developed and implemented may benefit from synergy with the relevant directions. The likely synergy levels have been estimated in the right hand column. However, Table 6 also shows that there are several TSSD component strategies that do not have relevant directions in Directions 2025.

6.3 Specific Gaps requiring WGGA Focus

6.3.1 Representation, Advocacy and Leadership

The majority of topics which require advocacy and representation for the wine grape growing industry are viticultural issues including biophysical and human/social issues which are relevant to all winegrape growers. Some are also issues relevant to the wine industry as a whole ie all components of the value chain. However, some topics result in different perspectives from different components of the value chain eg transactions between components. Even so, continued growth, development and competitiveness⁶ of the wine industry requires minimisation of the costs of these transactions.

Consequently, definition of the relevant subject for each issue requiring representation and advocacy is important and there is a need to differentiate between wine industry issues, viticultural issues and commercial and business management issues for wine grape growers. Different approaches are required for each.

6.3.2 Risk Management

ESD of vineyards and the wine industry, the major focus of Direction 9 of Directions 2025, requires effective risk management. Risk management was identified as equal fourth priority in the SDG update and, while mentioned in Direction 8 of Directions 2025, was given little prominence.

Effective risk management requires an understanding of issues and possible outcomes, and identification and evaluation of a range of adjustments to the outcomes. Issues highly relevant to risk management that require additional specific attention include:

- Climate change;
- Biosecurity issues including certified health status planting material;
- Security of access to resources – water and other biophysical resources, human and social capacity, technical (fertilisers, chemicals, machinery etc), finance and capital; and
- Differential changes in the cost of resources eg the current high rate of cost increase for fertiliser and chemicals and management responses.

6.3.3 Structural Adjustment

TSSD gives high priority to the issue of economies of scale. However, it appears to ignore the issues involved in structural adjustment to achieve economies of scale.

Representation and advocacy in the area of structural adjustment is fraught with difficulties particularly with specific categories of stakeholders. To a large extent, structural adjustment issues are separate from viticultural issues critical to the continued competitiveness of the Australian wine industry. Identification and specification of a range of options to achieve

⁶ Competitiveness of the Australian wine industry refers not only to competition from other winemaking countries, but also to competition from other beverages.

economies of scale and representation to ensure constraints to structural adjustment are minimised should be a high priority focus of WGGA.

6.3.4 Individual and Social Capital – Management and Labour capability and supply

Continued growth and development of the wine grape industry requires adequate numbers of middle level managers and skilled labour. Training to ensure adequate skills and measures to improve attractiveness of the grape growing industry to prospective managers and operators has not been given sufficient regard in any of the documents reviewed⁷.

Regarding social capital, TSSD gives high priority to improving the effectiveness of industry organisations.

7 RECOMMENDATIONS

7.1 WGGA Strategic Plan

The development of a WGGA strategic plan should:

1. Consider strategies which take advantage of the high and medium levels of opportunities for synergy with the directions specified in Directions 2025;
2. For representation, advocacy and leadership, develop approaches and strategies which differentiate between wine industry issues, viticultural issues, and business management issues regarding wine grape growing;
3. Provide a substantial focus on risk management issues such as climate change, biosecurity, access to resources and changes in cost of resources;
4. Develop a considered approach to structural adjustment which differentiates between the sustainability of wine grape production and welfare issues; and
5. Develop a long term plan for ensuring the industry has levels of individual and social capital sufficient to ensure its long term sustainability.

7.2 WGGA and NOS Review

WGGA should use this report to support its responses to and negotiations regarding the NOS review.

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It is mentioned under Strategic Imperative 2 – Business Competitiveness.