

# South Australia's spirits boom



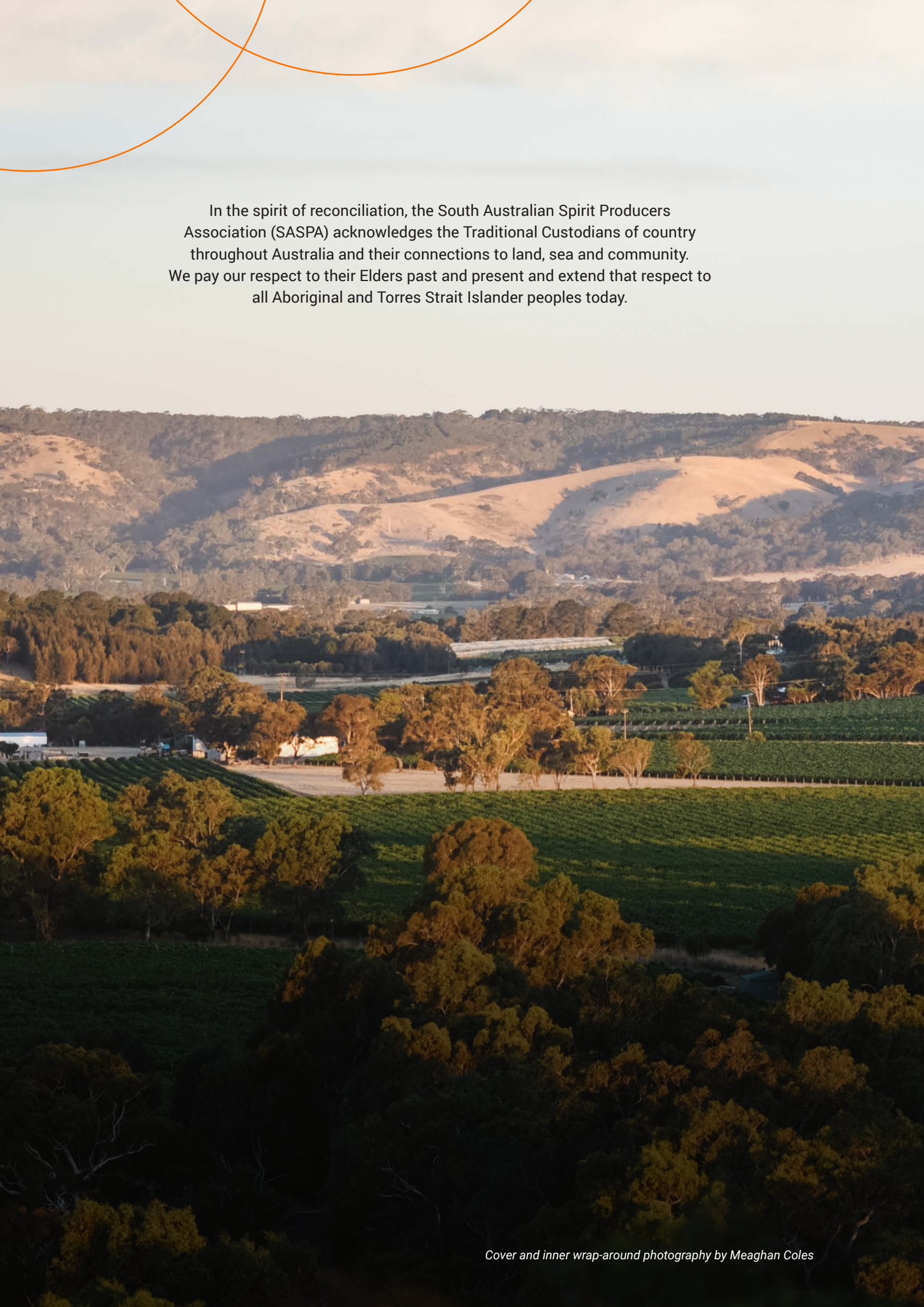
## INDUSTRY BLUEPRINT

A blueprint for the continued rapid and sustainable growth of South Australia's craft spirits sector



Government  
of South Australia

This project is proudly supported by  
the Government of South Australia

An aerial photograph of a rural landscape. In the foreground, there are dense green trees and a vineyard. The middle ground shows a valley with more vineyards, some buildings, and a line of trees. In the background, there are rolling hills with patches of green and brown, under a clear sky. Two thin orange lines are visible in the top left corner, curving across the sky.

In the spirit of reconciliation, the South Australian Spirit Producers Association (SASPA) acknowledges the Traditional Custodians of country throughout Australia and their connections to land, sea and community. We pay our respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

# Foreword from the Minister for Primary Industries & Regional Development

## **Our spirits industry is forging a bold new chapter in South Australia.**

It is a chapter not just celebrating the industry as it stands but mapping out a collaborative roadmap to ensure South Australia becomes the spirit state of the nation.

The spirits industry is not new to South Australia – the history of spirit production and sale date back to early Colonial settlement – but this industry blueprint marks a true ‘coming of age’.

Built on a legacy of notable, quality distilleries, the sector has experienced remarkable growth in recent years, with local products - such as gin - at the forefront of a wave of public enthusiasm.

This consumer interest has led to the development of a flourishing boutique but premium sector which has recognised the community’s interest in not just the product, but in a wider, sophisticated experience as a whole.

This success has been recognised outside our borders too, with South Australia’s spirit producers punching above their weight in terms of award wins on the global and national stage.

Plus, despite only making up 15 per cent of the nation’s spirits industry, our producers have forged a reputation for premium products of interest to discerning buyers worldwide.

We now have more than 50 distilleries established around the state, 60 per cent of which are located in our regions – crafting a variety of spirits including gin, whiskey and vodka, many using locally sourced ingredients.

It is important we not only promote these success stories but ensure there is a future pathway for growth and success for the sector at large.

This in turn will contribute to the state’s economy with a particular focus on regional South Australia, where so many businesses have put down their roots.

The State Government believes the opportunities to grow the spirits industry in South Australia and position us as a national leader in this space are within our grasp.

In 2019-20 the Australian spirit manufacturing industry generated \$2.1 billion in revenue and exports of \$306 million.

While South Australia has been an important contributor to that, we believe there is room for significant growth in this space.

Sales forecasts for South Australia craft spirit producers are estimated to be over \$39 million in 2022, providing a \$30 million contribution to Gross State Product (GSP).

The GSP contribution is forecast to grow to between \$94 and \$140 million by 2031.

As part of this burgeoning industry, the craft spirits sector is expected to directly employ more than 600 people across the state in production, sales marketing, administration and tourism roles in 2022. This figure is forecast to reach 2,300 people by 2031.

What the spirits industry needed to drive this growth was a comprehensive and collaborative plan encompassing all aspects of the sector to reach its full potential.

The South Australian spirits industry blueprint will help map out future growth of the local industry, supporting production, education, marketing and value adding.

It looks ahead at how this premium industry can contribute to the State Government’s Growth State target to increase GSP to an average annual rate of three per cent per annum.

I believe the spirits industry can make a notable contribution to that target, to the benefit of the sector, the business operators and the South Australian community as a whole.

I commend this industry for their foresight as they lead this sector forward towards being Australia’s ‘Spirit State’.



A handwritten signature in black ink, appearing to read 'David Basham'.

**Hon. David Basham**  
*Minister for Primary Industries and Regional Development.*

# President's message

South Australia is known globally for the quality of its food and drinks offerings, and the local spirits sector is rapidly emerging as a world leader in the production of magnificent premium spirits and fabulous spirits-based tourism and venue experiences. The emerging spirits sector is injecting new vibrancy and growth into our regions and city. The South Australian distillery trail and the integration of the spirits sector with our world class wine and tourism offerings is evidence of this. Furthermore, South Australian spirit producers have had fantastic recognition in international spirits awards.

The South Australian Spirit Producers Association (SASPA) was formed in 2018 as the first dedicated membership-based association to represent our diverse and growing industry, from metropolitan Adelaide, its surrounding hills, wine regions and beyond. It:

- **Promotes** South Australia as a leading spirits & liqueurs region
- **Represents** distillers and producers with State and Local Government
- **Advances** the interests of industry including in relation to local events
- **Supports** the Australian Distillers Association in its national objectives and
- **Protects** the integrity of the industry.

This year, with the support of the South Australian Government, SASPA has developed this first sector-wide industry blueprint to guide the sustainable, rapid growth of the South Australian spirits sector.

For the first time, we have gathered industry data to allow us to describe and quantify the economic contribution of our industry to the state and our future potential for growth – and let me tell you that it is as exciting as we have all believed. We certainly have the potential to make South Australia the nation's 'Spirit State'!

It has been a pleasure to work with fellow spirits industry leaders and other industry experts to unpack and understand the opportunities and enablers for our industry to grow, as well as the barriers and challenges we face.

The process has allowed us to establish strong relationships with South Australian Government departments, the University of Adelaide, the Waite Institute and Food South Australia and identify new potential partners. At a national level, Spirits and Cocktails Australia and the Australian Distillers Association continue to have an important role in the growth of the industry. We appreciate the incredible commitment these organisations have to the growth of the spirits sector and implementation of this blueprint.

The South Australian spirits industry now has a well-considered path forward for how we can collectively work together to achieve the continued rapid and sustainable growth of South Australia's spirits sector.



**George Georgiadis**

*President, SASPA*





# Executive summary

The spirits sector in South Australia is a rapidly growing sector consisting of many family businesses and entrepreneurs producing quality product. With recent success in international awards and impressive growth, the sector is now looking to expand to new markets including export opportunities and employ a new generation of South Australians.

Spirits producers are on track to directly employ over 600 people in production, marketing, sales, management and tourism in 2022. The forecast growth is for direct employment of approximately 2,300 people by 2031, a contribution to direct and indirect GSP of \$94 to \$140m.

The industry will also have a direct, positive impact on spirits wholesalers, spirits retailers and the hospitality sector and indirectly support agriculture, the services industries, tourism and the wider economy.

For the last four years South Australian craft exports grew an average of 70% per annum.

The development of this industry blueprint lays the foundation for the next decade of growth and success for the sector, representing an important signal on how to realise its extraordinary potential.

To help the sector make a larger contribution to the state's exports and employment, the industry needs to consider and address sustainable sales growth, capacity and capability to export, inputs, supply chain, safety, education and the regulatory environment.

As such, the blueprint has identified 6 key priorities to focus on, representing the key issues and areas of growth potential for the sector. These are:

- 1. Nurture collaboration through innovation and co-investment**
- 2. Develop our people through quality education and training**
- 3. Grow domestic and international markets and develop a Spirits Export Plan**
- 4. Increase production and sales**
- 5. Improve the operating environment and**
- 6. Grow the local visitor economy and hospitality experiences**

To help the industry realise its goals and growth potential, a joint working group with industry (SASPA) working with the South Australian Government will be needed to activate the blueprint.

The blueprint builds on the Government's Growth State agenda, will complement the South Australian Government's Food, Wine and Agribusiness Plan and will leverage government investment in overseas trade offices and Agtech.

This is an exciting time for the spirits sector. It will however require a combined effort from industry and government to maximise the potential employment and export growth opportunities for the South Australian economy and achieve the vision to make South Australia the nation's 'Spirit State'.

# Summary of Priorities

## Priority 1

### **Nurture collaboration through innovation and co-investment**

We will be a sector that actively collaborates, partners and co-invests with government, each other, our value chain and our people.

## Priority 2

### **Develop our people through quality education and training**

A core priority is ready availability of capable people who can produce quality spirits safely, provide excellent tourism experiences, can sell and export South Australia's spirits and engage with consumers in bars, pubs and retail outlets who have knowledge of, and passion for, South Australian spirits.

Partnering with educational institutions to professionalise the industry is the most significant short-term objective is to ensure that safety standards and systems are improved.

## Priority 3

### **Grow domestic and international markets and develop a Spirits Export Plan**

We must increase the sales opportunities and sales capability of the sector, starting with local sales as the foundation of successful growth into targets across all channels in restaurants, bars, tourism, retail, eCommerce, import replacement and exports.

## Priority 4

### **Increase production and sales**

Production growth will be enhanced by sector confidence to invest – growing sales and growing channel alongside increased availability of suitably skilled people. Accessing support to invest will also be critical through improved access to government programs as well as financiers who are confident in the sector.

To meet our growth objective, our value chains must grow alongside us. This document represents an important signal to our partners of the future growth of the sector, increasing their confidence to invest in their growth. Increased focus on research and development and deploying the latest in technology will be critical.

## Priority 5

### **Improve the operating environment**

We must address regulatory and social aspect of our operating environment, including minimising risks of harm for consumers, and the opportunities to make a positive contribution and reduce the industry's carbon impact.

The spirits sector is crippled by a punitive taxation system that creates an inequitable price burden, reducing competitiveness with other forms of alcohol and reducing growth potential of the sector. The opportunity represented by the explosion in Adelaide club, bar, pub and restaurant scene that has resulted from changed liquor laws in Adelaide should be extended to the rest of the state.

## Priority 6

### **Grow the local visitor economy and hospitality experiences**

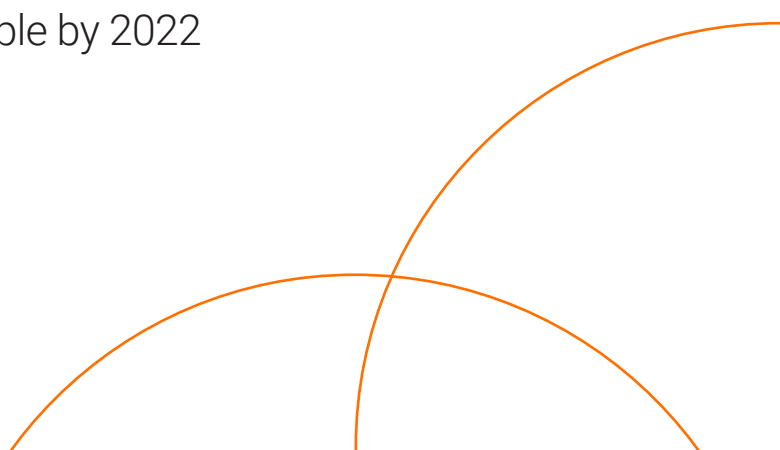
Interest in spirits experiences in Adelaide and in regions is growing rapidly and the excellent, but nascent, South Australian spirits tourism experience is just beginning.



## Spirit producers throughout South Australia

**50+**

independent spirit producers in South Australia employing an estimated **620** people by 2022



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# South Australia's emergence as a craft spirits powerhouse

Cocktails being made at Hains & Co

## Global success

South Australian distillers have achieved international awards at the highest level, putting South Australia alongside the UK and USA Pacific Northwest as one of the world's highest quality spirits regions. Accolades include Adelaide Hills Distillery's World's Best Grain Whisky (2021 World Whiskey Awards) and Distiller of the Year (Icons of Gin Awards 2020), Kangaroo Island Spirits Best Contemporary Gin (2019 International Wine and Spirits Competition) and Never Never Distilling Co.'s World's Best Classic Gin (World Gin Awards 2019), Best Regular Gin (San Francisco World Spirits Competition 2020), Global Distiller of the Year (The Spirits Business 2019) and 3rd Highest Trending Global Gin (Drinks International 2020).

South Australia's spirits industry is booming, dynamic, experimental and poised for growth. It is an emerging part of the state's economy which offers significant promise to the beverage manufacturing, tourism, hospitality and education sectors.

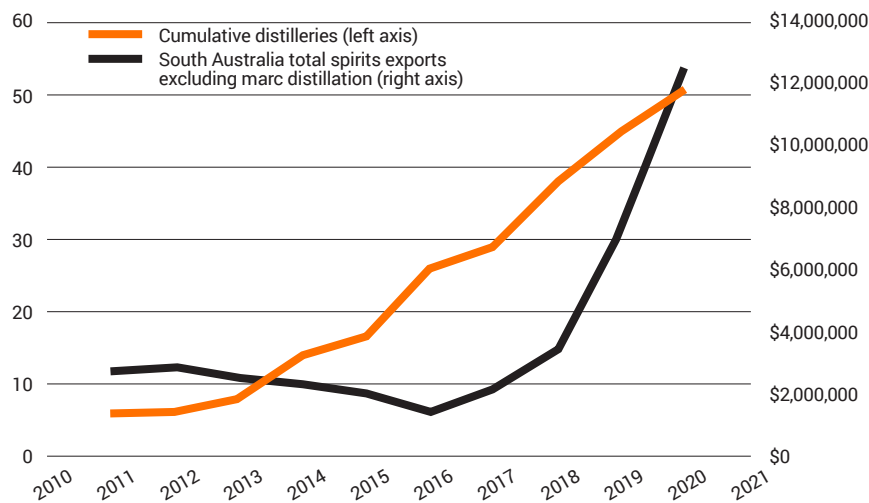
There are now over 50 spirit producers across South Australia, with a new producer literally 'popping up' every month or so. Over 60% of these are based in regional South Australia with almost 70% of distilleries being 5 years old or less as well as South Australia's Riverland being the home of Australia's oldest Brandy producer.

South Australia accounts for 8.5% of Australia's export value<sup>1</sup>. Over the last four years, South Australian craft spirits exports grew by over 600%<sup>2</sup>.

## Economic contribution

South Australian spirits producers buy inputs from local suppliers, attract interstate and international visitors, and create local jobs within their value chains. Sales alone are currently estimated to be over \$39 million in 2022, a contribution to direct and indirect Gross State Product (GSP) of 30m.

Spirits producers are on track to directly employ over 600 people in production, marketing, sales, management and tourism. The forecast growth is for direct employment of approximately 2,300 people and sales of \$120 to \$180m by 2031, a contribution to direct and indirect Gross State Product of \$94 to \$140m.



The industry will also have a positive economic impact on the wholesale, retail and hospitality sector. Based on national multipliers and South Australia's sector share this would represent an overall current economic contribution of the spirits industry of over \$300m, growing to over \$2bn and over 20,000 direct and indirect jobs in 10 years<sup>3</sup>.

The extraordinary growth of the SA craft spirits sector exports

<sup>1</sup> Australian Bureau of Statistics  
<sup>2</sup> Australian Bureau of Statistics  
<sup>3</sup> Hydra Consulting

## A head-start

South Australia's famous wine sector provides the growing spirits industry a head-start in supply chains, tourism reputation, R&D capability, and education platform. Some of the current success of the spirits sector has been through collaboration and partnerships with wine in tourism, supply chains and storytelling. The incorporation of spirits into capital city wine shows and Tasting Australia indicates the depth of spirits' rapid integration with South Australia's wine and food culture. The ready presence of matured barrels has also been a boon to dark spirit production.

The explosion of Adelaide's diverse hospitality, bar and mixology scene has been a significant contributor to the launch, sales, promotion and growth of new South Australia's premium spirits products.

In 2020, the sector already exported over \$12m per annum in craft spirits products with the leaders being brandy (China, Hong Kong, New Zealand and Singapore), gin (United Kingdom, Hong Kong, Singapore, NZ, China, and Japan), whisky (NZ, UK, China) and vodka (NZ, Hong Kong, Singapore, USA, China and Taiwan).

Due to the high value proposition of the sector and premiumisation of consumer drinking habits, import displacement is another key opportunity for the sector and South Australia's economy.

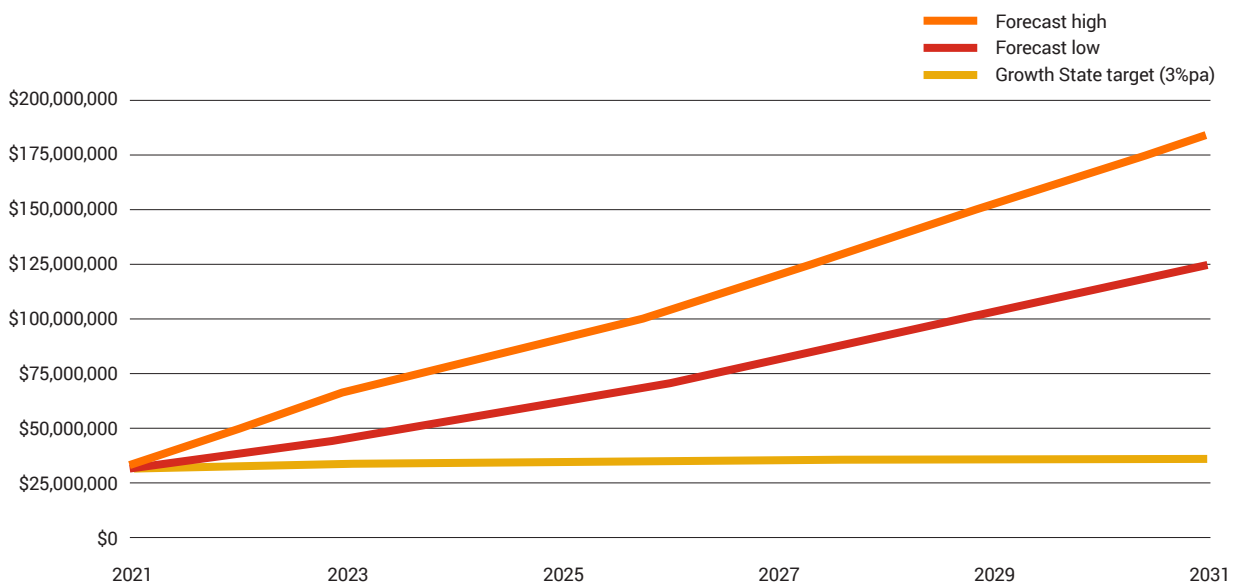
## Changing tastes

Australian drinking habits are changing. Abstinence has increased, consumption has declined, and heavy drinking has declined. Australian consumers are preferring to enjoy higher-quality alcohol in moderation, as opposed to lower-quality alcohol in excess<sup>4</sup>. They are quickly developing a taste for premium spirits, with gin increasing 36% from 2019 to 2020<sup>5</sup>. They are also embracing low and no-alcohol products, which represents a major opportunity for spirits sector innovation.

These changes are reflected globally, with both premiumisation of alcohol consumption and the growth in spirits now well-established trends.

## Future success

The current spirits boom is just the first chapter of the modern South Australian spirits story – ongoing, fast and sustainable growth is possible, but only if we build a platform for future success. This blueprint outlines how the sector can build a platform for future economic, financial, human and environmentally sustainable growth from this great head start.



Forecast sales

<sup>4</sup>Australian drinking habits: 2007 to 2017 (Drinkwise)  
<sup>5</sup>IWSR data, Australia's flourishing craft industry, June 2021

# Industry snapshot

## 1. Our spirit producers



There are over **50 spirit producers** in South Australia with the average age of a producer being **<7 years** old. **67%** are 5 years older or less and **38%** are 2 years older or less

## 2. Economic contribution

Sales/Revenue/economic contribution to Gross State Product (GSP):



2022 forecast (direct & indirect) = **\$30m**

2031 forecast (direct & indirect) = **\$94–\$140m**



**High rates of annual growth** will contribute to the Growth State target and the Food, Wine and Agribusiness Sector Plan revenue target of **\$23 billion by 2030**

## 4. Employment & Workforce



Direct employment  
**2022** forecast = **620**  
**2026** forecast = **1,300**  
**2031** forecast = **2,300**  
 Direct & indirect employment  
**2031** forecast = **20,000**

Top three areas of skills sought:



Quotes from the industry survey:

*"There are challenges in ensuring all staff are equipped with the knowledge needed of both category and product."*

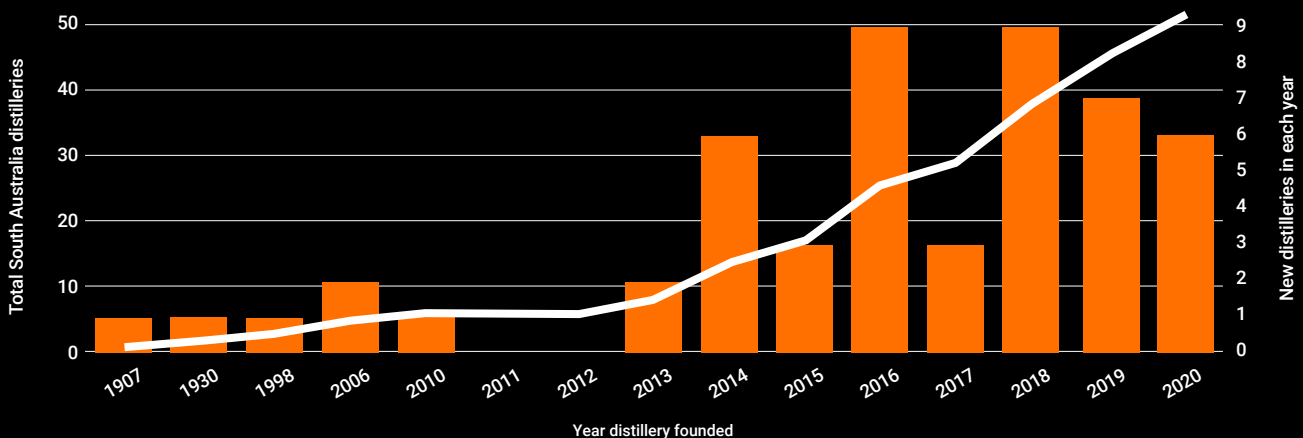
*"The distilling industry handles significant volumes of dangerous materials and in a highly regulated environment where little is understood."*

**74%** of spirits producers consider that workforce education is either inadequate or could improve

## 3. Growth

Timescale graph showing growth of number of distilleries:

■ New distillery      — Cumulative distilleries



## 5. Locations



**63%** of our producers are located **regionally**  
**37%** of our producers are **metro** based

## 6. What's produced

Percentage of businesses who responded to the industry survey said they were producing the following spirit products:



Gin  
**70%**



Liqueurs  
**30%**



Whisky  
**30%**



Vodka  
**28%**



Rum  
**16%**



Brandy  
**16%**

## 7. Exports

Key international markets are:



1. UK
2. China
3. New Zealand
4. Singapore
5. US
6. Hong Kong
7. Japan

## 8. Tourism

Quote from the industry survey:

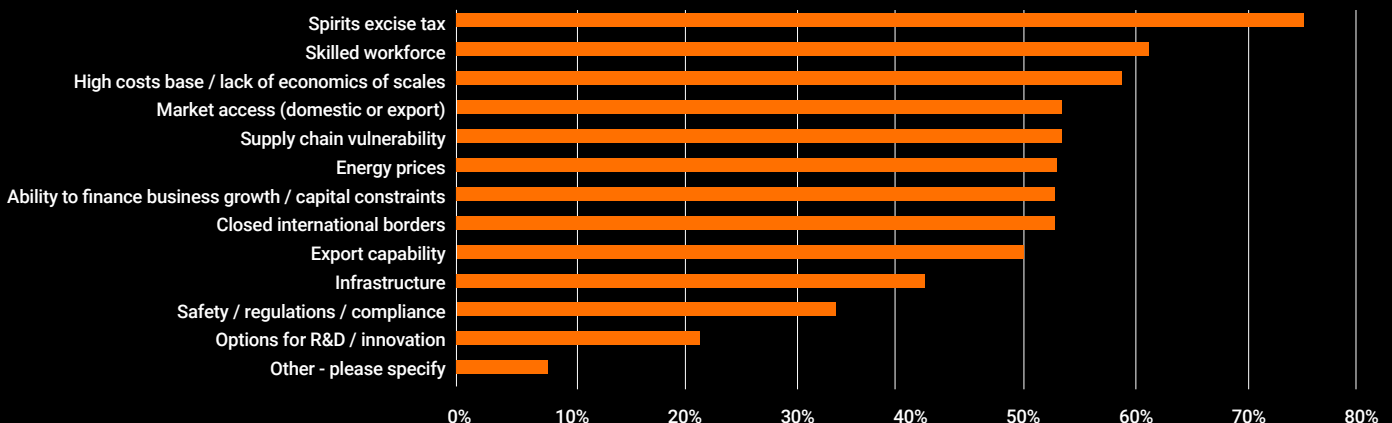
*"[We need] promotion of our distilleries on a national scale to increase tourism and understanding of our processes and quality."*

**33%** of spirits producers are planning new tourism activities like **improving and expanding Distillery Door, bar and on premise sales experiences**

South Australia is **significantly outperforming Australia in growth in domestic visits** to distilleries and breweries both in **visits (3x)** and **spend (1.5x)**

Distilleries and breweries are **substantially outperforming growth in food and wine** in South Australia

## 9. Barriers and constraints to industry growth



# St Agnes, South Australia's original craft spirits brand

The original St Agnes Distillery was built at Tea Tree Gully in the late 1800s by Dr William Thomas Angove. Initially making wine, he quickly expanded into distillation, distilling wine to a neutral spirit for fortified winemaking.

Dr Angove's son, Carl Angove expanded the distillation business to Renmark in 1910 building a winery and distillery to make wine and spirit from Riverland's fertile vineyards. In 1925 following a study trip to the home of brandy, Cognac, Carl Angove decided to create a new style of Australian brandy, lighter and more delicate than anything previously produced. With this new style of spirit, St Agnes brandy was born.

Every year since 1925, the St Agnes Distillery has been carefully handcrafting and ageing brandy in the historic St Agnes Barrel Halls, creating spirits that are a testament to the rewards of time, age, ambition and craft.

Winning 'Best Brandy in the World' three times for its 15-Year-Old XO Brandy, St Agnes is Australia's most highly awarded and most popular brandy. The St Agnes distillery is South Australia's oldest continually run craft distillery, with barrels dating back 50 years or more, St Agnes has a unique position in being able to offer such rare and distinguished spirits to the world. St Agnes brandies are truly world class, luxury products made right here in South Australia.

Today, the distillery also makes gin under its Blind Tiger Organic Gin label and a soon to be released whisky project has been many years in the making.



**Victoria Angove**  
Director at Angove Family Winemakers



**Priority 1**

# Nurture collaboration through innovation and co-investment

*The team at Malt & Juniper. Photography by Meaghan Coles*

### **Our Ambition:** Nurture and grow South Australia’s existing collaborative and innovative spirits culture to make South Australia the nation’s ‘Spirit State’

SASPA has been established by the local spirits industry for the local spirits industry. While still in its infancy, SASPA aims to grow the level of support and impact it can provide across the sector over the coming years.

There is also recognition of the significant opportunity for South Australia’s food and drinks sectors to collaborate and grow collectively at a business-to-business level and at an industry, regional and or state-wide level.

The state’s wine and food industries are well established with various industry and regional associations delivering a range of activities, programs and advocacy on behalf of their members.

The blueprint development process has highlighted potential areas of collaboration for the spirits industry with the state’s food, wine and other beverage sectors.

These include:

- State-wide marketing and storytelling
- Tourism and hospitality experiences
- Education, training and capability development
- Research and Development and
- Supply chain.

## Actions

### **1.1 Culture of collaboration**

Accelerate the culture of collaboration within the South Australian spirits industry and across related sectors by:

- Holding industry networking events and workshops
- Engaging and collaborating with the local craft brewing, wine, and food industry
- Promoting stories of successful collaborations across South Australia and
- Working with Food South Australia (Food SA), the state’s industry-led organisation representing food and beverage businesses, partnering with the AgTech advisory group, liaising with the SA Tourism Industry Council, accessing the ‘SME Food and Beverage Export Hub’, ‘Business Growth Program’, ‘Food Industry Digital Assets Program’, ‘Eat Local SA’ and the ‘I Choose SA’ campaign.



*The Palate Liberator at Twenty Third Street Distillery*

## Case study

NEVER  
DISTILLING CO.  
NEVER

# Never Never Distilling Co. at McLaren Vale

The founders of Never Never Distilling Co. always knew McLaren Vale would be their home and their bottle label was designed with a 'McLaren Vale' vista before even the first drop of liquid was bottled. That vista bears an uncanny resemblance to the incredible view that awaits visitors to the hilltop where Never Never has established its production facility and cellar door in collaboration with stalwarts of McLaren Vale: Chalk Hill Winery and Cucina di Strada (of Pizzateca fame).

While a start-up spirit producer teaming up with a sixth-generation family-owned winery may have raised eyebrows at the time, it is a collaboration that has delivered a new level of visitor experience to McLaren Vale. And the secret to this success? A shared vision and drive to give visitors to the region some of the best wine, food and spirits, all in one fantastic location.

The partners are committed to providing premium experiences alongside affordable and accessible offerings so that there is always something for any guest.

As a regional gin producer, Never Never strives to celebrate its location through selection of local botanicals, oranges, olives, almonds, honey, thyme and basil just to name a few. In their stall at the famous Willunga Farmers' Market, they interact with the community and celebrate local ingredients.

Spirits are at the epicentre of South Australia's collaborative food and drinks revolution with similar examples at Lot 100 (cider, wine, beer, spirits, juices and food) and Seppeltsfield Road, where wineries, accommodation, restaurants, Seppeltsfield Road Distillers, artists and artisans work together in South Australia's most successful tourism micro-cluster.



Tim Boast, Sean Baxter and George Georgiadis  
Founders of Never Never Distilling Co.



## Priority 2

# Develop our people through quality education and training

### **Our ambition:** To position South Australia as Australia's home of professional spirits education and innovation

We are already experiencing significant constraints in meeting our needs to develop skills in our people. Key gaps exist in distillation operations, work health and safety, product knowledge, marketing and sales, visitor experience and business skills. In the development of this plan, we have started the process of working with universities and the VET sector and will commence engagement with the non-award sector. Work, health and safety is a vital component that must be embedded into training programs so that distillers are equipped with the right skills to manage safety risks.

As South Australia is already the leader in wine sector capability building through universities, the vocational sector, non-vocational awards and the non-award sector, this strength can be transferred to the spirits sector. This encompasses the whole of the supply chain from business, marketing, production, sales, exporting and visitor experience development.

Some areas that are being addressed in an ad hoc way for the spirits are cooperation skills through FCTA-Building Careers, product skills through the Wine and Spirits School and the University of Adelaide reviewing spirits integration into existing wine offerings.

### Actions

#### **2.1 Risk management capability development**

Urgently identify a training or education pathway to increase the understanding of risk, regulations and the safety of South Australian spirits production. In addition, incorporation of safety and risk management to be included in all training and education packages.

#### **2.2 Distilling Certificate training**

Identify a partner and clearly identify the demand necessary to establish the distilling stream of the Certificate IV in Artisan Fermented Foods in South Australia, a nationally recognised course that currently is not delivered in Australia.

#### **2.3 Operational education and capability development**

Document an educational/capability matrix to ensure the development of capability in production, sales, export, tourism, eCommerce and retail. Parties to undertake this are the University of Adelaide, Australian Distillers Association, TAFE Wine and Spirits School and other accredited and non-accredited providers of export and tourism training in the wine sector. This should include, but not be limited to:

- Assessment of a micro-credential pathways for spirits production that incorporates VET, higher education, and potentially non-accredited elements.

## Priority 2 - Develop our people through quality education and training **cont.**

### Actions - 2.3 cont.

- Partner with the University of Adelaide to pursue opportunities for building upon existing course offerings across the spirits, wine, and brewing value chains, with a view to package a professional qualification across spirits production and business.
- Pursue partnerships with internationally renowned distilling education providers such as the Institute of Brewing & Distilling and Heriot-Watt University to leverage international credentials.

### 2.4 Market entry training

Develop training with the South Australian Department of Trade and Investment on market entry for the UK, USA, Singapore, China, Hong Kong, New Zealand, and Canadian markets (each market separately).

### 2.5 Business skills

Work with the University of Adelaide to obtain support to transition their Wine Business programs into a Wine and Spirits program (or Spirits program) as an executive education program.



*Australian Distilling Co. founder Michael Hickinbotham and Master Distiller, Associate Professor Graham Jones from the University of Adelaide's School of Agriculture, Food and Wine*



# Rebuilding the expertise we need in cooperage

Coopering, which was once offered in South Australia as an apprenticeship, is the creation of wooden barrels, casks and vats which are used in the production of wine and spirits. A “Coopering Sector Report” by the Australian National Training Authority in 2003 found that coopering would likely die out as a trade without the support of vocational training. It found that the coopering industry would increase if adequate and appropriate training was created, and that South Australia is best positioned to host the nation’s cooperage training.

With over 400 spirits producers nationally, there is a growing need to support them with quality locally made, maintained and refurbished barrels.

The South Australian Department for Innovation and Skills has been supporting Trisch Buff from the local training organisation, FCTA Building Careers, and Andrew Young, a master cooper based at Seppeltsfield, to develop a micro-credential in cooperage based on Andrew’s ‘Cooper for

a day’ workshops that he has been offering at his Seppeltsfield cooperage.

While still in progress, Andrew is undertaking a Certificate IV in Training and Assessment to become a qualified trainer and pass on his skills to future coopers. This is the first step in South Australia becoming the national training hub for cooperage training which, in turn, will allow all Australian distilleries to access or train qualified craftsmen to produce and service barrels. It is also anticipated that the training will attract international interest from neighbouring countries in the Pacific Region, as they also experience a dearth of cooperage training.



Andrew Young 1851  
Master Cooper at Seppeltsfield



## Priority 3

# Grow domestic and international markets and develop a Spirits Export Plan

The opportunities to grow South Australian spirits sales are through direct to consumer (club, web, cellar door sales), eCommerce, retail sales, gifting, restaurant, venue and other on-premise, and sales of tourism products.

**Our Ambition: To be the leading spirits of choice for South Australians, Australians and international consumers**

### Telling our story

The success of the South Australian spirits sector is a story itself. The sector needs to celebrate its own success and its history through the telling of our story. An initiative to promote the stories of the sector will be beneficial to growing local sales.

### Grow domestic sales in the on- and off-trade

The domestic market is highly competitive and consolidated, presenting a challenge in diversity of opportunities for small producers. Larger and more established local producers have good presence and there is significant support from many retail chains for local craft spirits producers, even as far as helping with identification of subsets of stores that make the most sense for specific brands. There is an established pathway of building profile in small bars or direct to consumer and building out to larger opportunities in major retail chains, pubs, liquor chains and export. However, spirits producers who expect shelf presence to drive sales will be disappointed as retailers expect producers to take responsibility to drive sales.

Scale is a key limitation on domestic brands reaching major outlets. Once local producers reach scale, opportunities can arise to displace international and other domestic brands. Retail and on-trade opportunities for smaller producers are critical in building brands. The on-trade is also an important pathway to building sales and brand resonance and is a potential step towards obtaining retail shelf-space.

The high levels of spirits excise are considered a significant barrier to the competitiveness of the craft spirits sector compared to other beverage alcohols in the domestic market.

Another significant challenge in the domestic market is messaging and storytelling by producers around premium products to drive consumption. Medals, reviews, articles, and endorsements of which consumers are aware are critical to driving consumer intent to buy and to interest retailers in stocking product.

### Grow eCommerce (domestic initially)

The utilisation of eCommerce is relatively young in the South Australian spirits sector. Whilst many have their own websites, they are not an important component of sales, and are often unsophisticated and poorly optimised for search. The utilisation of high-tech eyeball and customer delivery technology is in its infancy in the sector.

Target eCommerce opportunities include third-party clubs, direct mail campaigns, phone campaigns, gifting sites, gift cards, eCommerce on own websites combined with driving traffic, third-party online stores and recommendation sites.

## Grow international sales

While the domestic market is critical for fostering new brands and products and building initial brand success, the growth of the sector is dependent on export success.

Off a low base, branded spirits exports out of South Australia grew 600% to over \$12m from 2016 to 2020, representing approximately 5% of Australian spirits exports in 2019.

Over 50% of producers identify export capability as one of their top constraints to growth. They also find the export process complex and challenging, are unfamiliar with the correct channels and are unable to find importers/distributors while travel is restricted.

Key export markets are the UK, China, New Zealand, Singapore, Canada and the USA each of which has separate challenges for which significant knowledge is required. The investment by the South Australian Government in its overseas offices is welcomed. This provides another avenue for SASPA to gain market intelligence and in-market assistance to increase export sales.

Over the next five years distilleries should plan for overseas travel to be more difficult than pre-2020, building both virtual and in-person models to service export markets.

Other key barriers to export include the worsening state of international logistics, difficulty with partial container loads due to the ad hoc nature of timing, understanding labelling and compliance and difficulty growing the domestic market due to the disproportionate taxation of spirits compared to other forms of packaged alcoholic beverages.

## Actions

### 3.1 Implementation

Work with the South Australian Government to identify a funding model to support the implementation of this blueprint's urgent priorities.

### 3.2 Government engagement

Brief key agencies on the blueprint.

### 3.3 Growth State engagement

Present a proposal to the Growth State Food, Wine and Agribusiness Steering Committee.

### 3.4 Join South Australian Government trade events and export initiatives

Immediately identify South Australian Government export activations that are in-train for the wine and food sectors that have the potential to increase spirits export opportunities and actively engage spirits exporters.

### 3.5 South Australian spirits Exports Plan

Develop a South Australian spirits Export Plan, including identification of priority markets, target channel, target consumption occasions branding and in-market activations.

### 3.6 Trade and consumer education

Develop consumer and trade education materials, information, and campaigns to assist and drive demand. These should specifically include an initiative to tell the stories of the sector.



Richard Angrove inspecting the grapes at Angrove Vineyard



## Priority 4

# Increase production and sales

*Stocking shelves at Ambleside Distillers*

## **Our Ambition:** Enable fast growth of the sector in partnership with our value chains

### **Production**

Growing production requires investment from the private sector and attention from government. Investment will be supported by increased confidence in the potential of the sector and by ensuring that government understands the opportunity presented.

Crucial to the success of the spirits sector will be effective innovation in products, availability of relevant data and capability to innovate in production and in product development. Key areas for innovation are in product development (for example low and no alcohol products, low sugar/carb products, alternative low carbon packaging) and education. The South Australian Government's AgTech Advisory Council will be utilised for any expertise they can provide in the area of innovation, product development and value chains.

### **Value chains**

A thriving production industry is only as strong as the supply chains and ancillary support that surrounds it. Equally, a thriving production industry gives rise to flow-on benefits for new suppliers and services to emerge in the local economy.

The current supply chain supporting the South Australian spirits industry includes professional services, analytical services, equipment supply and maintenance, raw materials, transport and logistics, packaging, contract production, utilities and energy.

South Australia's wine, beverage and brewing sectors have provided a solid foundation for the spirits sector to develop rapidly. For example, grape marc, a by-product from wine production, is being converted to neutral spirit by Tarac Technologies to supply Australian distillers. Similarly, wine barrels that have reached their useful life for wine maturation are an essential resource for aging dark spirits. The burgeoning whisky sector is providing an exciting value-adding opportunity for South Australian grain.

Glass is identified as a significant issue with most of the sector's glass manufactured overseas and current supply and transport constraints affecting the spirits sector, however the required scale and specialisation is unlikely to support local production.

Innovation and training are required to maximise the value of wine barrels after their useful wine industry life. The South Australian spirits sector was gifted with early opportunities from a large stock of old, fortified barrels that provided a major resource to early new-wave producers. Barrels of such heritage and quality are already becoming limited, which will be exacerbated by the trend in the wine sector towards less use of new oak, extending the life of barrels to meet emerging consumer preferences and recent supply interruptions from Europe and the USA.

Supply chain risks in relation to key raw materials for gin production (juniper, coriander etc) are not specific to South Australia and we operate within an international market for these products.

Sustainable supply of indigenous botanicals holds significant risks with limited production and informal supply chains. Supply is expected to mature concurrently with the industry growth rate in the coming years however assistance in growing capacity in a sustainable way will assist.

Suppliers that are expected to grow alongside the industry are product innovation, bespoke purpose-built third party barrel storage for the sector, equipment manufacture and technical support and chemical analysis/testing.

The cost of energy is significant. Over 50% of distillers identify the cost of energy as one of their biggest constraints to growth, with estimates that energy accounts for approximately 25% of production costs and the most significant point source of carbon emissions.



Laboratory analysis at Tarac Technologies

## Actions

### 4.1 Research and education partnerships

Set the sector up for growth with effective research and education partnerships in critical areas such as flexible and innovative pathways for accreditation and training and in product innovation – initially through establishing an innovation round-table with the University of Adelaide.

### 4.2 Market data

Ensure that better market data is available to the sector. Initially Wine Intelligence and/or IWSR data are recommended for key markets so that drinks trends can be evaluated.

### 4.3 Supply chain analysis

Undertake a detailed supply chain analysis to identify the vulnerabilities and development opportunities for the supply chain to support the growth of the South Australian spirits industry.

### 4.4 'Outlook' communications

Inaugurate a craft spirits 'outlook' outbound communications specifically targeted at helping the whole of the spirits sector to adapt and grow together to become the nation's 'Spirit State'.

# Heritage grains, R&D and 5Nines Distilling

David Pearse and Steven Griguol of 5Nines Distilling in the Adelaide Hills believe the key for crafting unique whiskies is right here in our backyard – South Australia's long history in grain research at the Waite Institute coupled with innovative local grain growers.

5Nines Distilling prides itself on creating unique flavour experiences with local ingredients. In only five years of operation, it has embarked on a journey of research and development with Mark Shilling of AG Shilling & Co, a family-owned grain producer on the Yorke Peninsula.

Mark is using his passion for AgTech to modernise the production of heritage grains out of the Waite Research Seed Bank, many of which have not been grown commercially in Australia, or possibly the world, since the early 1900s.

The process to grow the size of the crop to produce enough grain for commercial use will take at least 3-5 years. However, in the next year or two, there will be enough grains for 5Nines to start experimenting.

For David and Steven, this is a long game which will see them create new, unique products with a strong story of provenance and history for many years to come. For Mark and AG Shilling & Co, this is an opportunity to diversify their customer base from primarily the international brewing industry to global spirits manufacturers.



David Pearse and Steven Griguol  
Founders of 5Nines Distilling



## Priority 5

# Improve the operating environment

'Mary' the copper pot still at Prohibition Liquor Co. Photography by Meaghan Coles

### **Ambition 1: Be responsible citizens**

### **Ambition 2: Improve the competitiveness of the South Australian regulatory environment**

#### **Social license**

SASPA believes spirits should be enjoyed in moderation and that spirits producers must encourage and promote responsible consumption. To this end, we will promote the involvement of members in awareness programs and initiatives, ensure they can access resources and ongoing education on health labelling requirements and support distillery operations meet best practice in responsible service of alcohol. We will work with our members to identify additional opportunities to reduce harm.

#### **Environmental management**

Distillery operations use significant volumes of energy and therefore have the potential to contribute to climate change. In South Australia, with one of the highest proportions of renewable grid energy in Australia, there is an opportunity to be world leading in emissions sustainability building on the emerging uptake of solar by producers. SASPA has adopted an initial target of the sector being carbon neutral by 2050, with an objective to bring this forward once a *Carbon Reduction Plan* is developed.

A sustainable product lifecycle is important to the industry. We will strive to maximise recycling and will engage with the South Australian Government on initiatives to maximise recycling including the "Improving South Australia's recycling makes cents" discussion paper.

#### **Spirit excise tax**

Distillers in Australia are hindered by a spirit tax that is the third highest in the world and the largest of any Australian beverage alcohol. It is 67% higher than in New Zealand and 950% higher than the USA. It is also significantly higher than that imposed on beer or wine<sup>6</sup>. The tax is indexed twice a year adding operational complexity to the tax burden.

While Australia's craft spirits continue to receive global acclaim, higher domestic taxes make them less able to grow and compete against international spirits in Australia's sophisticated beverage alcohol market. Without relief from the headline excise rate, Australian distillers will continue to struggle to raise the necessary growth from domestic sales to build their brand story and production volumes to the levels needed to tackle global markets. Whilst this does not stop many distillers from rising to export capability, it does slow them down significantly. Although the new rebate provides an opportunity to get a start, there is little incentive for growth once domestic sales pass approximately 4,000L or 13,000 bottles per annum.

75% of surveyed South Australian distillers ranked excise in their top five constraints to growth. They described how it directly chokes their ability to invest cashflow in growth.

<sup>6</sup>Australian Distillers Association and Spirits and Cocktails Australia 2021; 2021 Pre-Budget Submission Spirits industry Tax Reform; [https://www.spiritsandcocktailsaustralia.com.au/wp-content/uploads/2021/01/SCA\\_Pre-Submission\\_spreads-with-spine-compressed\\_RGB.pdf](https://www.spiritsandcocktailsaustralia.com.au/wp-content/uploads/2021/01/SCA_Pre-Submission_spreads-with-spine-compressed_RGB.pdf)

## Priority 5 - Improve the operating environment **cont.**



### Liquor licensing – small venues

The Liquor Licensing (Small Venue License) Amendment Act 2013 has created a vibrant small bar scene that has ballooned from almost zero to over 100 within 4 years of 2013. Licensing has grown the pie so that small and large venues are thriving together in an exciting club and bar scene in Adelaide. Venues small and large are providing an ecosystem where all are offering a fantastic range of South Australian craft spirits, providing a point of market entry for producers of all production volume ambitions.

These benefits to communities and producers should be extended throughout South Australia, increasing the post 5-pm vitality of key visitor hot-spots and the opportunities of craft wine, beer, cider and wine producers alike. SASPA joins with other organisations in calling for the expansion of the Liquor Licensing (Small Venue License) Amendment Act 2013 through a 3-year trial in the Adelaide Hills, South Australia's Riverland, McLaren Vale, Barossa, as well as across inner metropolitan suburbs around Adelaide.

### Liquor licensing – cellar doors

The current Alcohol Production and Sales Licence is problematic for spirits producers selling their products in cellar doors and associated venues. It does not permit spirits producers to mix with other spirits and liqueurs to make cocktails that properly showcase their products.

## Actions

### 5.1 Understanding regulatory obligations

Assist spirit producers to understand their regulatory obligations by providing resources through the SASPA website, which may include excise tax information, ADA Safe, WHS obligations, responsible service of alcohol, and labelling resources including FSANZ guidance and DrinkWise.

### 5.2 Responsible consumption

Develop policies on the responsible consumption of alcohol and participate the development and circulation of national educational materials to members so they can increase responsible consumption and provide effective health messaging.

### 5.3 Carbon neutrality

Commit to being carbon neutral by 2050 via the development of a pathway to carbon neutrality such as partnerships with renewable energy providers to deliver emissions reductions, via a carbon reduction plan. The preference is to identify opportunities to accelerate this ambition.

### 5.4 Recycling

Complete a review of the "Improving South Australia's recycling makes cents" discussion paper and provide a submission as part of SASPA's engagement with the government on regulatory matters.

### 5.5 Increase small venues licensing

Advocate for the Liquor Licensing (Small Venue License) Amendment Act 2013 to apply to additional locations through a 3-year trial in Adelaide suburbs, the Riverland, Adelaide Hills, McLaren Vale and Barossa.

### 5.6 Excise tax relief

Advocate for spirit excise tax relief by making representations to the Australian Government and working with its interstate contemporaries and national bodies. SASPA will seek support from the South Australian Government to prosecute in any taxation discussions as part of national cabinet and COAG (Council of Australian Governments).



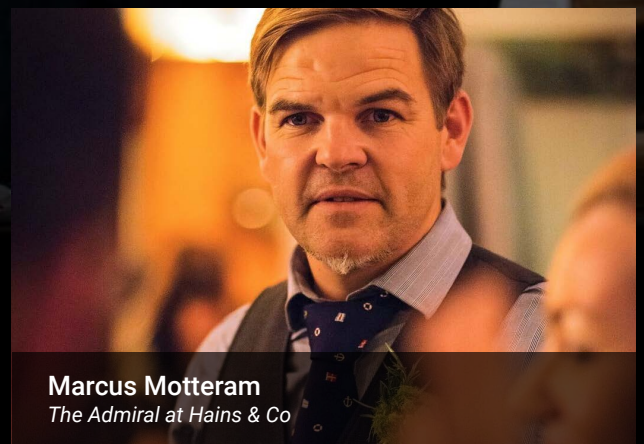
## Case study

# South Australian small bars – Hains & Co

One of the reasons Marcus Motteram from Hains & Co moved back to South Australia from Melbourne is the release of a small bar license in Adelaide. Having owned and run several small venues in Melbourne and experiencing first-hand how they changed the landscape of the hospitality industry there, he wanted to be part of the vanguard of new bars in Adelaide.

“Education is a massive part of what small bars bring to the table when compared to other hospitality environments such as restaurants and pubs. We are curators of fine beverages and experiences, and as such take more time to speak with our patrons about the products we are serving, the stories, brands and people behind them. We are the sommeliers and chefs of spirits; our job is not only to create tastes, but personal experiences based on our patrons’ interests.

At Hains & Co, we are extraordinarily proud to say that we purchased the first case of gin off many of our local suppliers. Our quest has always been to support other small fledgling businesses, and to showcase their brands and stories to our customers. We have watched with excitement as several of these producers we have seen grow into bigger businesses, and to have been a small part of their success is humbling.”



**Marcus Motteram**  
*The Admiral at Hains & Co*





## Priority 6

# Grow the local visitor economy and hospitality experiences

*Seppeltsfield Road Distillers' distillery and tasting room*

### **Our Ambition: Build the 'cellar door' and bar economy of the South Australian spirits sector**

Innovation in cocktails and a renewed interest in the skills of bartenders and mixologists has seen a surge in consumer interest in high-quality drinks and hospitality experiences. Cellar doors, popup events and bars have grown in popularity in metropolitan and regional areas. These offer a diverse experience and a more premium drinking culture, with skilled mixologists and high customer engagement<sup>7</sup>.

SASPA has developed the South Australian Distillery Trail<sup>8</sup> and in 2021, hosted the first ever annual SpiritFest, which has the momentum to grow significantly in 2022. Ongoing initiative development will be required to maximise the opportunities from tourism promotion for spirits – both live and online.

Only a small proportion of distillery cellar doors are currently listed on SouthAustralia.com via the Australian Tourism Data Warehouse (ATDW). While SASPA can play a role to encourage more members to register through the platform, there is currently not a sub-category for distilleries. There is an opportunity to champion the South Australian Tourism Commission (SATC) to work with ATDW to create a separate sub-category specifically for distilleries, that can potentially leverage recent investment in imagining cellar door experiences more effectively on ATDW.

Once international tourism opens, distilleries need to be poised to take advantage of the opportunities presented by international tourists. They will need to create internationally saleable experiences that substitute for a reduction in domestic visitation at values that make it profitable for international resellers. The most likely way that this will come about is through experience aggregators and regional visitation experience collaborations with food, wine and other beverage partners.

Distilleries are in demand and growing in both visitation numbers and spend. In recent years growth in the volume of visitation and growth in value of visits to distilleries and breweries has outstripped that of wine and food, making distilleries desirable partners for wine and food operators<sup>9</sup>.

Eat Local SA is a marketing program that allows visitors to locate venues that serve and sell the very best South Australian food on their menus and shelves across the state. Food SA, who run the program, have advised that they are in the process of rebranding it to 'Eat and Drink Local SA' and that they will work with SASPA to promote the opportunity for distilleries, bars, and other venues to join the program to promote our wonderful spirit brands.

<sup>7</sup> Australian Distillers Association and Spirits and Cocktails Australia 2021; 2021 Pre-Budget Submission Spirits industry Tax Reform; [https://www.spiritsandcocktailsaustralia.com.au/wp-content/uploads/2021/01/SCA\\_Pre-Submission\\_spreads-with-spine-compressed\\_RGB.pdf](https://www.spiritsandcocktailsaustralia.com.au/wp-content/uploads/2021/01/SCA_Pre-Submission_spreads-with-spine-compressed_RGB.pdf)

<sup>8</sup> <https://sadistillerytrail.com.au/>

<sup>9</sup> Tourism Research Australia

## Actions

### 6.1 Eat and Drink Local SA

Work with Food SA to rebrand its 'Eat Local SA' initiative to 'Eat and Drink Local SA' and will work with SASPA to promote the opportunity for distilleries, bars and other venues to join the program.

### 6.2 Better tourism experiences

Activate and prepare distillery cellar doors to develop tourism experiences that are high-value and saleable into digital tourism distribution chains and to register these with regional tourism organisations (RTOs) and on the Australian Tourism Data Warehouse. Development of these experiences (group or individual) to be facilitated by local wine/food tourism specialists.

### 6.3 Grow regional tourism and festivals

Continue to build and promote the SASPA Spirit Trail and SpiritFest and develop new collaborative opportunities working with the SA Tourism Commission to create regional tourism experiences that can be promoted and sold by international tourism resellers.



Chalk Hill / Never Never Distilling Co., Chalk Hill Wines and Cucina di Strada. Photography by Meaghan Coles

## Case study

# Success through collaboration for Seppeltsfield Road Distillers

Seppeltsfield Road Distillers would not be what it is today if it were not for the Seppeltsfield Road Business Alliance collaborative mini cluster. This group of wineries, eateries, tourism experiences, accommodation, entertainment, crafts and the distillery formed a marketing and referral network to maximise the experience visitors on the western side of the Barossa.

From the beginning of Seppeltsfield Road Distillers, Jon and Nicole Durdin engaged with local businesses to discuss their plans for the business and cellar door. The positive reactions not only helped their development application process but from the very first day they opened they already had a strong referral network from surrounding businesses.

Three years in and Jon, Nicole and the team can support others through storytelling, referrals and collaborative projects.

During COVID, when businesses were forced to focus on online audiences, they were able to partner with more established brands like Seppeltsfield Wines and Henschke on combined campaigns to take each other's products to their respective audiences.

Even within the Seppeltsfield Road Business Alliance there are even smaller microcosms of collaboration such as those businesses within the township of Marananga. Before Jon and Nicole set up in the town there was little on offer, some great wineries on the outskirts and limited accommodation. In only three years there are now two new accommodation providers which give visitors the opportunity to stay overnight and explore the area in and around Marananga without the need for a car. Within walking distance of the accommodation there are wineries, restaurants and, of course, Seppeltsfield Road Distillery.



**Jon Durdin**  
General Manager at Seppeltsfield Road Distillers



# Implementation timeline

## Priority 1 - Nurture collaboration through innovation and co-investment

Start	Immediate	Urgent: 6 months	Next 12 months	Important: 2 years	Ongoing
Action	<b>1.1 Culture of collaboration</b> Accelerate a culture of collaboration within the SA spirits industry				

## Priority 2 - Develop our people through quality education and training

Start	Immediate	Urgent: 6 months	Next 12 months	Important: 2 years	Ongoing
Action	<b>2.1 Risk mgmt. capability development</b> Identify a training pathway to increase the understanding of risk, regulations and safety	<b>2.2 Distilling Certificate training</b> Establish the distilling stream of the Certificate IV in Artisan Fermented Foods	<b>2.3 Operational capability development</b> Develop educational/ capability development needs, and delivery matrix  <b>2.4 Market entry training</b> Develop training on market entry for priority markets	<b>2.5 Business skills</b> Work with the University of Adelaide to transition Wine Business programs a Wine and Spirits program (or Spirits program)	

## Priority 3 - Grow markets and develop a Spirits Export Plan

Start	Immediate	Urgent: 6 months	Next 12 months	Important: 2 years	Ongoing
Action	<b>3.1 Implementation</b> Identify a funding model to support the implementation of this blueprint  <b>3.2 Government engagement</b> Brief agencies on blueprint  <b>3.3 Growth State engagement</b> Present a proposal to Growth State Food, Wine & Agribusiness Steering Cttee	<b>3.4 Get involved in South Australian export initiatives</b> Identify export activations in partnership with government  <b>3.5 South Australian spirits Exports Plan</b> Develop a South Australian spirits Export Plan	<b>3.6 Trade and consumer education</b> Develop consumer and trade education materials		

<b>Priority 4 - Increase production and sales</b>					
<b>Action</b>	<b>Start</b>				
	<b>Immediate</b>	<b>Urgent: 6 months</b>	<b>Next 12 months</b>	<b>Important: 2 years</b>	<b>Ongoing</b>
<b>4.1 Research and education partnerships</b> Set the sector up for growth with effective research and education partnerships	<b>4.2 Market data</b> Ensure that better market data are available to the sector than currently	<b>4.3 Supply chain analysis</b> Undertake a detailed supply chain analysis	<b>4.4 'Outlook' communications</b> Inaugurate craft spirits 'outlook' outbound communications		

<b>Priority 5 - Improve the operating environment</b>					
<b>Action</b>	<b>Start</b>				
	<b>Immediate</b>	<b>Urgent: 6 months</b>	<b>Next 12 months</b>	<b>Important: 2 years</b>	<b>Ongoing</b>
<b>5.1 Understanding regulatory obligations</b> Assist spirit producers to understand regulatory obligations	<b>5.2 Responsible consumption</b> Develop policies and practices on responsible consumption of alcohol	<b>5.3 Carbon neutrality</b> Commit to being carbon neutral by 2050 at the latest  <b>5.4 Recycling</b> Engage with government on recycling	<b>5.5 Increase small venues licensing</b> Advocate for small venue licensing to apply to additional locations		<b>5.6 Excise tax relief</b> Advocate for spirit excise tax relief

<b>Priority 6 - Grow the local visitor economy</b>					
<b>Action</b>	<b>Start</b>				
	<b>Immediate</b>	<b>Urgent: 6 months</b>	<b>Next 12 months</b>	<b>Important: 2 years</b>	<b>Ongoing</b>
	<b>6.1 Eat and Drink Local SA</b> Work with Food SA to rebrand 'Eat Local SA' to 'Eat and Drink Local SA'	<b>6.2 Better tourism experiences</b> Develop digitally marketable, internationally saleable tourism experiences	<b>6.3 Grow regional tourism and festivals</b> Develop collaborative regional tourism experiences		

# The South Australian spirits Industry blueprint ('the blueprint')

The South Australian Spirit Producers Association (SASPA) has developed the blueprint in partnership with the local spirits industry and the South Australian Government. Its objective is to map out the first stage of the future growth of South Australia's spirits sector to ensure it can reach its full potential as the nation's 'Spirit State'.

A working group provided a critical forum to discuss, advise and provide support in gathering information and data. Four sub-groups undertook deep dives into specific industry focus areas of supply-chain and packaging, education, innovation and safety, markets, and data and forecasting.

The South Australian spirits industry was surveyed to gain the first ever snapshot of the industry, including its economic contribution to the state. The results of this comprehensive survey have supported and shaped the blueprint.

SASPA thanks the blueprint working group, SASPA committee members, industry stakeholders and forum attendees for their time and contributions to the development of this blueprint.



## Supporting partners



Government  
of South Australia



SASPA would like to acknowledge the work of the Steering Committee and their contributions to this document: David Pearse, George Georgiadis, Jon Durdin, Catherine Sayer, Prof. Matthew Gilliham, Dr. Armando Corsi, Bodhi Edwards, Jeremy Blanks, Irina Ferouleva, Justin Harman, Ali Lockwood, Dr Darren Oemcke, Ron van Buuren and Matt Williams.

Australians' relationship with alcohol is changing. We are drinking more responsibly, reducing the harm caused by excessive alcohol consumption, driving under the influence and binge drinking. This is a change for the positive in Australian society. We strongly encourage the responsible, moderate and safe consumption of alcohol, and the provision of clear messaging to support this.