



Wine Industry
Outlook Conference

Outlook 2008: Striking a sustainable balance

Thursday 13th November, 2008

Australian Technology Park, Eveleigh, Sydney



The Australian wine industry has never faced a wider array of challenges and questions than in 2008. Stockbrokers, analysts, shareholders, winemakers, grapegrowers, suppliers and distributors; in fact, anyone with an interest in the global wine market should not miss this important event that evaluates the status and prospects of the Australian wine industry.

Conference Secretariat:

All Occasions Management

Conference Manager: Jessica Bosnakis

41 Anderson Street, Thebarton, South Australia 5031

Email: conference@aomevents.com

Ph: (08) 8125 2200

Fax: (08) 8125 2233

For more information and online registration visit:

www.wfa.org.au

Proudly presented by the Winemakers'
Federation of Australia and Winetitles



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Overview

The Australian wine industry has never faced a wider array of challenges and questions than in 2008. Issues of the environment, sustainability, regionality, profitability and climate change will affect us all. Outlook 2008 will take a three-pronged approach in discussing the questions foremost in the minds of the Australian wine industry looking forward.

To set the scene, Outlook 2008 will address the here and now, by considering the economic overview and the perennial question of supply and demand.

What does the future hold for a regional winemaker in terms of profitability, production, markets and growth?

An "on the couch" discussion, moderated by Michael Pascoe, will debate the optimal harvest size for the Australian wine industry, in the context of our environmental footprint, branded business opportunities and the number and structure of grapegrowing and winemaking enterprises.

Since 1994, the Wine Industry Outlook conference has delivered relevant and challenging agendas for winery executives, winemakers, marketers, strategists, stockbrokers, analysts and investors.

To be held in conjunction with the Maurice O'Shea dinner the night prior to the conference, Outlook 2008 will again address key issues for the Australian wine industry.

Accommodation

Accommodation has been reserved at a variety of venues with special Conference rates. Accommodation rooms are limited and allocation will be strictly on first-come-first-serve basis.

- **Mercure Sydney** ★ ★ ★ ★

818-820 George Street, Sydney NSW 2000

Ph: (02) 9217 6666 Fax: (02) 9217 6672

– \$195.00 per Standard Room per night
(single, double or twin share)

– \$225.00 per City View Room per night
(single, double or twin share)

- **Rydges World Square** ★ ★ ★ ★ ★

389 Pitt Street, Sydney NSW 2000

Ph: (02) 8268 1888 Fax: (02) 9283 5899

– \$279.00 per Deluxe King Room per night
(single, double or twin share)

Accommodation booking and deposit

To make a booking, please complete the relevant section on the registration form and forward with an amount equal to one night's accommodation rate. All accommodation bookings must accompany credit card details. This information will be passed onto the hotel of your choice as security for your booking; the nominated credit card will not be debited by the hotel prior to your arrival. You will be required to settle the total of your account upon checkout. If you fail to check in and do not cancel your reservation with All Occasions Group in accordance with the hotel cancellation policy your credit card will be charged a penalty fee at the discretion of the hotel.

Please note: Alterations or cancellation of hotel accommodation must be sent in writing to All Occasions Management, not to the hotel. Cancellations with less than seven days notice given may incur a penalty. This is at the discretion of the hotel.

Arrival and check-out times

Hotel check in time is 2.00pm. To guarantee a room to be available for an early arrival you will need to book for the night before. Check out time is strictly 11.00am. Late check out will result in the hotel's day rate being charged.

Late Arrivals

Please indicate on your registration form or notify All Occasions Management in writing if you will arrive at your hotel after 6.00pm. Failure to do so may result in your room being released. The accommodation deposit will be forfeited should you not arrive on the date for which you have booked. In this instance, your subsequent night's accommodation will be cancelled and may be re-sold without notice.

Registration

Delegates will receive an electronic confirmation and tax invoice on receipt of registration. All further materials will be distributed on the day. The Registration Desk will be open from 8.00am.

TO REGISTER:

POST Complete the registration form on the back page of this brochure and send to: All Occasions Management
Conference Manager: Jessica Bosnakis
41 Anderson Street, Thebarton, South Australia 5031
Email: conference@aomevents.com

FAX Complete the registration form on the back page of this brochure and fax to: (08) 8125 2233

ON-LINE Head to www.wfa.org.au

NOTE: when registering on-line only credit card payments will be accepted.

Cancellations

Cancellations received in writing by Thursday 6th November 2008 will be accepted and a refund issued of the registration fee less \$100 administration fee.

Cancellations after this date cannot be refunded, however registrations can be transferred to another person within your organisation.

Conference queries, registrations and cancellations to

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Conference Manager: Jessica Bosnakis
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Thebarton, South Australia 5031
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Or online at www.wfa.org.au



Program

Outlook 2008: Striking a sustainable balance

8.00am Registration

9.00am Moderator – Michael Pascoe

9.05am Welcome and opening – David S. Clarke, AO

President, Winemakers' Federation of Australia

The industry and market dynamics

Session sponsor: Challenger Wine Trust

9.15am Saul Eslake

Chief Economist of the Australia & New Zealand Banking Group (ANZ)

9.45am Lawrie Stanford

*Manager Information and Analysis,
Australian Wine and Brandy Corporation*

10.30am Panel session: David Clarke, Saul Eslake and Lawrie Stanford

10.45am Morning tea

Pitfalls and positives: what does the future hold for a regional winemaker?

Session sponsor: Gaetjens Langley

11.15am Phil Sexton

Owner, Giant Steps/Innocent Bystander

11.45am Eliza Brown

CEO, Peter R. Brown Family Vineyards

12.15pm Christina Tulloch

General Manager, Tulloch Wines

12.45pm Panel session

13.15pm Lunch

Towards sustainability: an "on the couch" discussion

Session sponsor: ZORK

Moderator – Michael Pascoe

Debating the optimal harvest size for the Australian wine industry in the context of our environmental footprint, branded business opportunities and structure of grape growing and winemaking enterprises.

14.15pm Amy Russell

*Director – Natural Resources,
Winemakers' Federation of Australia*

Alister Purbrick

CEO, Tahbilk

Christopher Findlay

Head of the School of Economics, University of Adelaide

John Grant

President, Hardy Wine Company

Andrew Weeks

Vineyard Manager, Jubilee Park Vineyards

15.45pm Moderator summary

16.00pm Close, drinks

Sponsor: Winetitles

Michael Pascoe, Moderator

Michael Pascoe is one of Australia's most respected and experienced finance and economics commentators with more than three decades in newspaper, radio, television and on line journalism. Perhaps best known for his 18 years as the Nine Network's finance editor, Michael Pascoe now is associate editor of the internet publication, eureka.com.au. He also contributes to Crikey.com.au, Channel Seven's news programs and is in regular demand as a conference facilitator and speaker.

Saul Eslake, Chief Economist, ANZ Banking Group

Saul has been in his current role since August 1995. He is a member of ANZ's Group Asset and Liability Committee, which oversees the management of the Bank's balance sheet, and is also Chairman of ANZCover, the Bank's internal fraud, crime and professional indemnity insurer.

Saul began his career as an economist in the Commonwealth Public Service, moving through roles with National Mutual Funds Management (now part of the Axa Insurance group) and stockbroking firm McIntosh Securities.

**Lawrie Stanford, Manager of Information and Analysis,
Australian Wine and Brandy Corporation**

As Manager – Information and Analysis with the Australian Wine and Brandy Corporation, Lawrie is charged with managing a team that keeps the Australian wine sector informed.

Lawrie's analysis, reports and commentaries are sought after as the authoritative point of reference in his field, and his annual supply and demand update is eagerly anticipated as a definitive presentation on the national outlook.

Phil Sexton, Owner, Giant Steps/Innocent Bystander

In the early 1980s, Phil was employed as Brewer by the Swan Brewery, going on to establish Devils Lair in the Margaret River district. With broad interests in other business, Phil spent two years in the US before returning to establish Giant Steps, which produced its first vintage in 2001 – and subsequently Innocent Bystander, first released in 2004, proudly opening the Cellar Door in September 2006. It was during this time that Phil and two business partners established Little Creatures Brewing in Fremantle Western Australia.

Eliza Brown, CEO, Peter R. Brown Family Vineyards

Eliza started as the Cellar Door Manager in 2001, moving on to Sales and Marketing Manager. She became the CEO of Peter R. Brown Family Vineyards in 2005, with her sister and brother as joint owners and board members. Eliza also became the first woman Director and Board Member of Brown Brothers. In 2007, Eliza was a finalist in the prestigious Telstra Business Women's Awards, participated in the wine industry Future Leaders program and is also a member of the Food, Wine & Tourism Council of Victoria.

Christina Tulloch, General Manager, Tulloch Wines

Christina is the fourth generation of the family to be involved in the business in her capacity as General Manager, joining the company in 2003.

She is also the secretary of the Hunter Valley Wine Industry Association, and received the award for Rising Star of the Year at the inaugural 2007 Hunter Valley Wine Industry Awards. In March 2008 Christina was also appointed to the Winemakers Federation of Australia, Small Winemakers Membership Committee and has recently completed the highly regarded Australian wine industry Future Leaders program.

**Christopher Findlay, Head of the School of Economics,
University of Adelaide**

Christopher's research interests lie in issues in global services and agricultural markets, especially Australia's business in these activities with Asia. He is convenor of the management group for the University of Adelaide's Australian Wine 2030 research network. He has a PhD in Economics from the Australian National University.

John Grant, President, Hardy Wine Company

John was appointed in March 2007. He has 22 years' experience in the beverage industry with a diverse background spanning General Management, Marketing, Operations, Sales and Mergers/Acquisitions. John has lived and worked in Australia, the UK and the United States. He has six children (three Australians and three Americans) and lives in Adelaide with his New York born wife.

**Amy Russell, Director – Natural Resources,
Winemakers' Federation of Australia**

Amy's role responsibilities include the development and implementation of the Australian wine industry's environmental stewardship program and tracking export market assurance trends. She coordinates the Wine Industry National Environment Committee, and is Sustainability Committee Co-Chair and sustainability spokesperson for the FIVS (international alcoholic beverage trade association).

Alister Purbrick, CEO, Tahbilk

Alister has over 30 years experience in the wine and liquor industries, beginning his career as Winemaker for Mildara Wines (Coonawarra and Mildura) in 1976 before returning to Tahbilk as Chief Winemaker in 1978.

He was appointed Chief Executive of Tahbilk in 1980 and today the Tahbilk group of companies (known as Winecorp) consists of 16 separate corporate entities and profit centres with a turnover of just under AUD \$100 million.

Alister has also been actively involved in Australian Wine Industry affairs since 1984 and has held a number of significant roles, including President of the Winemakers' Federation of Australia (1999 – 2001) and President of the Australian Regional Winemakers Forum (1989 – 1992, 1994 – 1996)

Andrew Weeks

Educated in Renmark and in Adelaide, Andrew completed a Bachelor of Agricultural Science at the University of Adelaide in 1992. He worked in vineyards in Langhorne Creek and Sunraysia. After three years as a technical manager based at Angove's Nanya Vineyards in Renmark, he accepted a position as the Vineyard Manager for Jubilee Park Vineyards, where he remains today. Andrew has seen vineyard operations in France, New Zealand, the US, and Israel. He is active on the Riverland Wine Grape Growers' Association and the wine industry Innovation Policy Committee; and has recently completed the wine industry's "Future Leaders" program.



Wine Industry Outlook Conference

■ Outlook 2008: Striking a sustainable balance

TAX INVOICE – WFA ABN 38 359 406 467 Thursday 13th November, 2008 Australian Technology Park, Eveleigh, Sydney

One form per person. Please print in block letters.

Title: DR | PROF | MR | MRS | MS | MISS (circle)

Given Name: _____

Surname: _____

Position: _____

Organisation/Affiliation: _____

Preferred Name & Affiliation for name badge: _____

Postal Address: _____

State: _____ Postcode:

Telephone (Business): _____

Telephone (Mobile): _____

Email: _____

Registration

Earlybird and Group Discount Registration*	\$400.00	<input type="checkbox"/>
WFA Member	\$400.00	<input type="checkbox"/>
Full	\$475.00	<input type="checkbox"/>
Student**	\$160.00	<input type="checkbox"/>
TOTAL (prices include GST)	\$	

* Earlybird bookings made by Wednesday 22nd October 2008 and group bookings of three (3) registrations or more.
** The Winemakers' Federation of Australia values the contribution of students and wishes to encourage their involvement in industry planning. The generously discounted registration fee is available to a limited number of students only on a first-come basis. Proof of full-time enrolment required on registration.

Registration and Payment to:
All Occasions Management
Conference Manager: Jessica Bosnakis
41 Anderson Street
Thebarton, South Australia 5031
Email: conference@aomevents.com
Ph: (08) 8125 2200 Fax: (08) 8125 2233
Or online at www.wfa.org.au

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Ph: (08) 8125 2200

Thank you for your registration for the 2008 Wine Industry Outlook Conference. The Winemakers' Federation of Australia, with its key sponsor Winetitles and sponsors Challenger Wine Trust, Gaetjens Langley and ZORK, has made every effort to secure an enlightening panel of speakers to ensure you receive a valuable and challenging day of wine industry knowledge and expertise.

Delegate list:
To attract quality sponsorship, the WFA may undertake a variety of business arrangements with sponsors. These may include provision to disclose delegates' contact details to key sponsors for the sole purpose of enabling the sponsor to provide information about the sponsor's products or services, including special offers and benefits provided on an exclusive basis to Outlook Conference delegates.

The Winemakers' Federation of Australia is bound by the Privacy Act and respects your right to privacy. If you do not wish to have details of your Outlook Conference registration provided to Outlook Conference sponsors, please indicate below.

Please exclude my name and details from the delegate list.

Proudly presented by the Winemakers' Federation of Australia and Winetitles



Accommodation

Arrival Date: _____ Departure Date: _____

Estimated Time of Arrival: _____

Name of person(s) sharing: _____

Single Double Twin Smoking Non-smoking

Please indicate your hotel preference (1,2) in the boxes below. All rates are room only per night and GST inclusive.

Mercure Sydney

\$195.00 per Standard Room per night (single, double or twin share)

\$225.00 per City View Room per night (single, double or twin share)

Rydges World Square

\$279.00 per Deluxe King Room per night (single, double or twin share)

Travel

All Occasions Management is pleased to offer the services of our in-house travel agency, All Occasions Travel. We provide a "one-stop-shop" enabling you to book accommodation, flights, tours, travel insurance and hire cars.

Please contact one of our friendly travel consultants for further information.

41 Anderson Street, Thebarton, South Australia 5031
Email: travel@aomevents.com Ph: (08) 8125 2222

Please complete the details below and a consultant will contact you to complete the booking.

Departing Airport: _____ Desired Departure Date: _____

Desired Departure Time: _____

Desired Return Date: _____ Desired Return Time: _____

Frequent Flyer Number: _____ Number of Persons Travelling: _____

Payment options

Registration total: \$ _____

Accommodation total: \$ _____

Total: \$ _____

Please Note: FULL PAYMENT is required prior to the commencement of the Conference.

Payment options (please tick)

I enclose a cheque made payable to "All Occasions Group – Winemakers' Federation"

Electronic Funds Transfer to Commonwealth Bank Account Name, "All Occasions Group Trust No 3", BSB 065 112, Account Number 1016 3945. To allow us to identify your EFT payment, please enter "WFA surname" as the statement reference. A remittance advice must also be forwarded by email or fax to All Occasions Management.

Please charge my Credit Card for the above amount. (please tick)

Mastercard Visa American Express Diners Club

Cardholder's Name: _____

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Expiry Date: /

Please note debits to your account will appear as 'All Occasions Management'. Please return this form to: **All Occasions Management – WFA**

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