

A SHARED RESPONSIBILITY.



TREASURY
WINE ESTATES



INTRODUCTION

At Treasury Wine Estates, we recognise wine as part of a long-standing agricultural and cultural tradition that supports communities and economies globally.

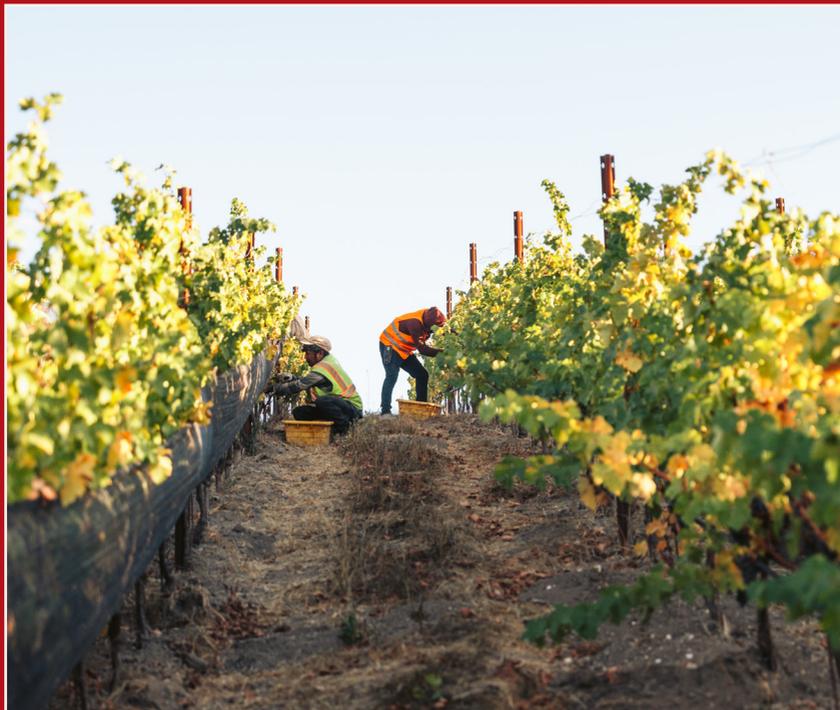
As custodians of this craft, we're committed to ensuring wine continues to play a responsible role in society. Through innovation, collaboration, and education, we're empowering consumers with choice and advocating for healthy, inclusive communities which promote responsible enjoyment.

TABLE OF CONTENTS

- 01 – Preserving the art of winemaking
 - 02 – Connecting communities and cultures
 - 03 – Supporting regional communities
 - 04 – Fostering healthy communities through collective impact
 - 05 – Expanding consumer choice and driving innovation
-



01 — Preserving the art of winemaking.



The art of winemaking has existed for over 8,000 years, making it one of the oldest cultural and agricultural traditions.¹

The wine industry is rich with continuity, with vineyards remaining in the same families for generations, creating lineages of vigneron intimately tied to the land. Approaches to pruning vines, choosing harvest times, fermenting and blending are often passed down from generation to generation. Each bottle tells a story of people, places, and passion — reflecting landscapes, culture, and craftsmanship.

Many of TWE's brands are deeply rooted in this winemaking tradition. **In Italy, Castello di Gabbiano boasts cellars that date back to 1200**, a testament to centuries of craftsmanship and heritage. In Australia, Penfolds has been grounded in experimentation, curiosity and uncompromising quality since 1844, whilst Wynns Coonawarra Estate has built a reputation as the region's pre-eminent wine producer since the first vineyards were planted in 1891.

Together, these stories reflect the enduring legacy and innovation that define TWE's portfolio and the global wine community it represents.

“

I enjoy how wine can feature in social settings or be the centre of a conversation, and how it can be forever linked to a memory or moment of significance. Anyone who's ever tasted Grange remembers exactly when they did, and they're always eager to share the story.”



Steph Dutton
Penfolds





02 — Connecting communities and culture.



For many adults, wine is enjoyed as part of meals, celebrations, and cultural traditions — complementing food, social connection, and shared experiences. For thousands of years, wine has played a significant role in celebrating life's moments and sparking discussion.

Social spaces, including local pubs and hospitality venues, play a vital role in bringing people together. In the UK, 54% of people say that connections they make with strangers in pubs help to alleviate feelings of loneliness and 56% say they've forged an ongoing friendship with people they met at their local pub.² Australians who regularly visit their local pub report being more trusting, fulfilled, and connected to their communities.³





“

I think wine has made an immense contribution to Australian society and if I pare that back to its simplest, it's about two or more people having a glass of wine and a discussion.



Sue Hodder
Wynns Coonawarra



Globally, the wine industry is a significant economic driver:

US	<p>United States</p> <p>In the US, the wine industry generates USD \$323.55 billion in economic activity, supports 1.75 million jobs.⁴</p>
EU	<p>Europe</p> <p>In the EU, the wine sector contributes €130 billion to EU GDP and supports nearly 3 million jobs, 1.4% of EU employment.⁵</p>
AUS	<p>Australia</p> <p>Australia's wine industry contributes AUD \$51.3 billion annually and supports over 200,000 jobs.⁶</p>
ASIA	<p>Asia</p> <p>The Asia Pacific wine market size stood at USD 61.62 billion in 2025 and is projected to reach USD 82.43 billion by 2030, advancing at a 5.99% compound annual growth rate.⁷ In Thailand, the wine and spirits sector contributed USD \$198 million to GDP and supported 20,500 Thailand in 2022, whilst in Vietnam, the sector contributed USD \$282 million to GDP and supported 65,600 jobs.⁸</p>

The wine industry is the backbone of many regional economies, supporting communities through employment and tourism. In South Australia, the Barossa Vintage Festival draws over **70,000 visitors** every two years, boosting the local economy, whilst in the US, the wine industry generates **over 74 million tourist visits**.⁹

03 — Supporting regional communities

Wine also plays a role in supporting communities and economies across the world. TWE alone operates in over 70 countries and directly employs over 2,600 people around the globe.





The Penfolds Evermore Program is our commitment to making a positive contribution towards a world where future generations can thrive.



Guided by three strategic priorities – Community & Culture, Future Winemaking and Towards Sustainability – Evermore reflects Penfolds’ aspiration as a global winemaker, employer and leader to leave a lasting, positive mark on the people, places and communities we are connected to. The program brings this purpose to life through meaningful initiatives that support communities, help to protect the environment, and invest in future generations.

A flagship initiative under this platform, the Penfolds Evermore Grant Program, represents an AUD **\$1 million commitment** made in 2023 over five years to fund innovative projects that make a positive impact in the communities connected to Penfolds.

In Australia, the grant program supports bold and innovative projects such as an initiative transforming textile waste into recycled fabrics, while providing workshops to empower people with disabilities to design new textiles and establish micro-businesses.

The program also provides scholarships to students studying wine related courses at universities and other education institutions, nurturing the next generation of winemakers, wine storytellers, and custodians. One recipient, Ona Rombaut who received the Penfolds prize in 2025 for outstanding results in the Level 4 Diploma of Wine at WSET shared:

“

My greatest ambition is to share my passion for wine as widely as possible, making it both accessible and easy to understand for everyone. It’s just this perfect combination of intuition and intellect, creativity and structure, heart and mind. It’s magic to me.”



Ona Rombaut

Penfolds EMEA Evermore scholarship recipient



04 — Fostering healthy communities through collective impact



We recognise the role we play advocating responsible consumption & support the World Health Organisation's target to reduce harmful alcohol use by 20% by 2030, through education, choice and innovation.

Our [Responsible Consumption of Alcohol Policy](#) outlines how we support informed choices and responsible drinking across all aspects of our business.

Collective Impact

We work in partnership with social impact organisations – Drinkaware, Drinkwise, Community Alcohol Partnerships UK and Portman Group – to help deliver campaigns and programs that tackle harmful alcohol consumption:

TWE launched the 'Stay Tasteful While Tasting' cellar door campaign with DrinkWise in 2022 at Penfolds Magill Estate to help people make informed choices and enjoy responsibly at our cellar doors.

TWE also joined DrinkWise and the Parliamentary Friends of Preventative and Public Health at Parliament House in 2023 for an educational event exploring Australia's evolving drinking culture. The discussion highlighted DrinkWise's research on no and low alcohol products and the role of continued education in encouraging moderation.

TWE joined Drinkaware in Parliament for the launch of the 2025 Drinkaware Monitor – an independent snapshot of how UK adults are consuming alcohol. The event brought together researchers, policymakers, and industry representatives to share insights and drive collective action.

Responsible Marketing

We uphold responsible marketing obligations (ABAC in Australia, Portman Group and ASA in the UK) and are proactive in advancing responsible marketing across the industry. Our [Responsible Marketing Guidelines](#), and the Guiding Principles that underpin them, apply to all our marketing and promotional activities.

In 2024, we commissioned an independent review by Charles Sturt University to assess our marketing practices and ensure alignment with global and local regulations. The review found that TWE goes beyond legal compliance in its responsible marketing practices and is well-positioned to lead the industry through consumer education, strategic partnerships, and evidence-based messaging.

In 2024, the Portman Group conducted an industry-wide review of 500 alcohol products on the UK market to assess compliance with industry's best practice guidance. It found strong compliance across the sector, with 99% carrying pregnancy warning labels, 96% including alcohol unit information and 92% either signposting to Drinkaware or carrying an alternative responsible drinking message. The review included several TWE products such as 19 Crimes red wine, Wolf Blass Chardonnay, Lindeman's Sauvignon Blanc, Penfolds Shiraz Cabernet and Squealing Pig Sauvignon Blanc.

TWE internal responsible consumption and wine appreciation panel with health and industry experts



Education

Beyond industry partnerships, we promote responsible consumption through education. In China, we support programs to help educate university students through our 'Extraordinary Journey' public wine lectures and the China Agricultural University Scholarship Program. We also participate in the China Alcoholic Drinks Association's (CADA) 'Dragon in Campus' joint lecture series. The lectures include scenario-based responsible consumption training, based on case studies from CADA's White Paper on Responsible Drinking.

Within TWE, we are focused on embedding responsible consumption into our workplace culture, ensuring our people are informed, supported and empowered.

We have embedded Drinkaware guidance into our global online Alcohol Policy & Responsible Consumption training, with the goal of 90% completion rate of desk-based employees by F26.

In May 2025, TWE hosted an internal panel bringing together experts from across the industry, including DrinkWise ambassador and medical expert Dr Andrew Rochford. The discussion explored wine's role in society and Dr Rochford explained the importance of understanding alcohol's impact on health.

In October 2025, staff in the US joined a discussion on responsible consumption with Charles Jefferson, Vice President, International and Federal Policy at the Wine Institute. The panel discussed why TWE's Responsible Consumption Policy matters, the role of wine in society, the rise of no and low alcohol alternatives, and practical ways staff can help to embed a responsible consumption mindset across TWE.



“

Wine is something that connects people with a place, a time, a memory. It's quite an emotive drink and one of the pleasures of life.”



Marie Clay
Leo Buring







05 — Expanding consumer choice & driving innovation



As moderation and responsible consumption are becoming the global norm, TWE is leading the way in creating wines that meet consumer expectations.

We are pioneers in crafting no and low alcohol wines that replicate the taste, aroma, and experience of traditional wine. As part of this commitment, TWE invested AUD \$15 million to build a world-class no and low alcohol facility in the Barossa Valley.

Our Flavour Lock™ Technology is a world-first, proprietary innovation that sets a new benchmark in the no- and low-alcohol wine category. This patent-pending process preserves the aroma, varietal integrity and mouthfeel that are so often lost during dealcoholisation, delivering a superior-tasting wine experience without compromise.

TWE has championed innovation in this category since 1993, when Seppelt introduced its first range of low-alcohol wines. Today, brands like Squealing Pig and Pepperjack continue to expand mid-strength offerings to meet evolving tastes and preferences.

Globally, more consumers are choosing no and low alcohol options, with the zero-alcohol category expected to grow by USD \$4 billion by 2028.¹⁰ Moderation is becoming the norm, with 'light drinkers' (those who drink infrequently and in low amounts) representing the largest global consumer segment, outpacing medium and heavy drinkers.¹¹

64% of adult consumers, across ten global markets, claim to be moderating their alcohol intake, whether that be drinking less frequently or choosing lower-strength products.¹²

“

Wine brings people together - whether it's a social occasion or a moment of celebration.”



Andrew Fleming
Coldstream Hills





“

Wine is so important within our culture - the beauty of wine is that it brings people together. It's one of the few drinks we really talk about as being part of the dinner table.”



Marie Clay
Leo Buring



Our ongoing commitment.

As we continue to innovate and collaborate across the world our focus remains clear: to foster a world where wine is appreciated with respect and moderation. Through education, choice, and collective impact, we're helping to ensure that the art of winemaking, one of humanity's oldest traditions, continues to play a pivotal role for generations to come.



Sources & References

1 Jason Daley, "Oldest Evidence of Wine Making Found in Georgia," Smithsonian Magazine, November 14 2017
<https://www.smithsonianmag.com/smart-news/oldest-evidence-wine-making-found-georgia-180967199/>

2 Thomas Thurnell-Read, Open Arms: The Role of Pubs in Tackling Loneliness, Version of Record (Loughborough University, 2021), accessed via Loughborough's Research Repository
https://castlerockbrewery.co.uk/app/uploads/2021/11/Open-Arms-The-Role-of-Pubs-in-Tackling-Loneliness_Final-Report.pdf

3 Peter K. Jonason, Where Everyone Knows Your Name: The Social and Psychological Value of Having a "Local" in Australia (Western Sydney University, in consultation with Robin Dunbar, Oxford University, 2019)
<https://lionco.com/app/uploads/2019/07/Full-report-where-everyone-knows-your-name.pdf>

4 The National Association of American Wineries, United States Economic Impact Study 2025
<https://wineamerica.org/economic-impact-study-2025>

5 Comité Européen des Entreprises Vins (CEEV), "Wine, a Champion and a Solid Pillar of EU's Socio-Economy and Rural Development, PwC Study Says", Brussels, 20 March 2024
<https://www.ceev.eu/newsletter/wine-a-champion-and-a-solid-pillar-of-eus-socio-economy-and-rural-development-pwc-study-says/>

6 AgEconPlus Consulting and Gillespie Economics, Economic Contribution of the Australian Wine Sector 2025 (Report prepared for Wine Australia, August 7, 2025)
<https://www.wineaustralia.com/getmedia/813bf473-955c-40f5-aae2-c6a8c14d3d4a/MI-AgEconPlus-Gillespie-Economic-Contribution-Aust-Wine-Sector-2025-report.pdf>

7 Mordor Intelligence, Asia-Pacific Wine Market Size & Share Analysis – Growth Trends and Forecast (2025–2030),
<https://www.mordorintelligence.com/industry-reports/asia-pacific-wine-market>

8 The National Association of American Wineries, United States Economic Impact Study 2025
<https://wineamerica.org/economic-impact-study-2025/>

9 IWSR Drinks Market Analysis, "Growth of \$4bn+ Expected from No-Alcohol Category by 2028," IWSR Insight, published ca. December 2024
<https://www.theiwsr.com/insight/growth-of-4bn-expected-from-no-alcohol-category-by-2028/>

10 IWSR Drinks Market Analysis, "Shifts in Moderation Strategies for Beverage Alcohol," IWSR Insight, February 24, 2025
<https://www.theiwsr.com/insight/shifts-in-moderation-strategies-for-beverage-alcohol/>

11 IWSR Drinks Market Analysis, "Moderation: Is It Generational or Universal?," IWSR Insight, January 24, 2024
<https://www.theiwsr.com/insight/moderation-is-it-generational-or-universal/>



If you have any feedback or would like to get in touch with us directly about the responsible consumption of alcohol please contact us at corporate.communications@tweglobal.com

Enjoy
Responsibly

Get the facts
**Drink
Wise.
org.au**

be **drinkaware**.co.uk



TREASURY WINE ESTATES