



**SOUTH AUSTRALIAN
WINE INDUSTRY
ASSOCIATION**

**Jobs and Skills Australia
2025 Core Skills Occupations List (CSOL) Consultations**

SUBMISSION OF:

SOUTH AUSTRALIAN WINE INDUSTRY
ASSOCIATION INCORPORATED

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ABOUT THE SOUTH AUSTRALIAN WINE INDUSTRY ASSOCIATION (SAWIA)

The South Australian Wine Industry Association (**SAWIA**) is an industry association representing the interests of wine grape growers and wine producers throughout the state of South Australia.

SAWIA is a not-for-profit incorporated association, funded by voluntary member subscriptions, grants and fee for service activities. Our mission is to provide leadership, advice and support to South Australian grape and wine businesses, assisting them to prosper within a dynamic, diverse industry.

SAWIA's membership represents approximately 96% of the winegrapes crushed in South Australia and about 40% of the vineyard area. The board of SAWIA is comprised of six members elected by the membership and seven members nominated by each of the main wine regions in South Australia (Adelaide Hills, Barossa, Clare, Coonawarra, Langhorne Creek, McLaren Vale and Riverland).

SAWIA has a strong track record as an industry leader and innovator in many areas and proactively represents members and the greater wine industry to government and related agencies on a wide variety of matters.

[Value](#) delivered to members covers four key areas:

- a) representation and leadership;
- b) providing expert advice, information and resources to members on employee relations, industrial relations, Work Health and Safety, liquor licensing, environment and other matters;
- c) driving programs and initiatives that improve grape and wine industry operations; and
- d) creating domestic direct-to-consumer opportunities and supporting the development of export markets.

THE SOUTH AUSTRALIAN WINE INDUSTRY

The South Australian wine industry contributes a total of approximately \$2.45 billion annually to the state's economy¹.

In South Australia there are approximately 1,250 licensed² wine producers (including about 600 processing facilities, 340 cellar doors³) and 3,182 registered vineyard owners⁴, who together directly employ around 8,990 persons⁵ and indirectly support another 81,900 jobs⁶.

South Australia has approximately 74,732 hectares under wine grapes⁷, of which 77% are red and 23% white grape varieties. The estimated total wine grape crush in 2024 in South Australia was 702,344 tonnes, accounting for 49% of Australia's crush, which was 14% below the 10-year average⁸. In 2024, the Riverland contributed 63% of the state's crush by volume and 26% of the estimated value of grapes, with the Barossa the second largest region contributing 9% of the state's crush by volume but 23% of the estimated value of grapes⁹.

In the twelve months to the end of June 2024, South Australia exported¹⁰ 370 million litres for a value of \$1.80 billion (74% of Australia's total value). South Australia's major export markets by value are currently China, Hong Kong, Singapore, UK, US and Canada. South Australian wine businesses export to about 100 countries.

¹ Primary Industries Scorecard 2022-23.

² Consumer and Business Services SA

³ The Australian and New Zealand Wine Industry Directory, 2023

⁴ SA Winegrape Crush Survey 2024, Wine Australia

⁵ Census 2021, Australian Bureau of Statistics

⁶ Derived from Economic Contribution of the Australian Wine Sector 2019, AgEconPlus. Wine Australia [website](#)

⁷ SA Winegrape Crush Survey 2024, Wine Australia

⁸ National Vintage Report 2024, Wine Australia

⁹ SA Winegrape Crush Survey 2024, Wine Australia

¹⁰ South Australia State Export Report, 31 March 2025, Wine Australia

Wine regions are a significant contributor to South Australia's tourism economy, which is currently worth around \$10.1 billion annually¹¹, with at least 20%¹² of international visitors to South Australia visiting wine regions and spending around \$2.34 billion annually¹³.

CHALLENGES IN THE AUSTRALIAN WINE INDUSTRY

The Australian wine industry consists of 65 wine regions across the six states and one territory (ACT). This is a valuable export industry, exporting \$2.48 billion worth in wine and 2.9 billion prior to the imposition on China's export duties in 2020¹⁴.

In March 2024, the Agriculture Ministers representing Australian jurisdictions acknowledged the severe challenges facing Australian wine grape growers, particularly in inland regions, due to the oversupply of red wine grapes. The estimated 2.2 billion litres of wine currently in Australian inventory exceeds the 10-year average by 288 million litres. This issue is compounded by a global decline in wine consumption driven by shifting consumer preferences, geopolitical tensions in Europe, global supply chain disruptions and cost-of-living pressures¹⁵.

In response, the Australian Government established the Viticulture and Wine Sector Working Group to develop a national strategy to address the red wine oversupply, tackle the sector's immediate challenges and support a return to balance and profitability¹⁶. The group also commissioned a report by Professor Kym Anderson, Executive Director of the Wine Economics Research Centre at the University of Adelaide, titled "Australia's Wine Industry Crisis and Ways Forward: An Independent Review". The report made a number of crucial findings, including:

- a significant oversupply of some red wine grape varieties;
- prices for certain red wine varieties have fallen below production cost;
- commercial red wine prices are forecast to decline further in 2024-25;
- the average price of red wine grapes in Australia's warm inland regions fell in each of the three vintages to 2024, reaching near-record lows.

Beyond the Chinese market, global alcohol consumption is facing headwinds, with total recorded alcohol spend in the 15 largest markets declining in 2024. Wine consumption has been particularly affected, with global consumption measured in servings declining by 4% compared to 2023 and by 20% compared to 2019¹⁷. Consumer behaviors are also shifting, with some choosing to abstain from alcohol altogether, while others are reducing consumption but opting for higher-priced wines, and there is a growing demand for no or low-alcohol wine options.

These trends highlight the ongoing volatility in global wine markets. While the reopening of Chinese trade has provided some relief, weak international demand and shifting consumer preferences continue to pose significant challenges for Australian wine producers.

Amidst these challenges, the industry still needs access to skilled labour, with particular challenges in regional locations. As set out in this submission it would be wrong to assume that the challenges has eased the skills shortages in the industry.

WINE INDUSTRY WORKFORCE

The wine industry is both unique and complex in nature. It takes raw produce, wine grapes, and turns them into a value-added product, wine, that is sold throughout the world. Unlike other manufacturing sectors, the wine industry's viticultural foundations require long lead times to produce a crop and based on the vagaries of nature, each vintage makes the balance of supply and demand a constant challenge.

¹¹ South Australian Tourism Commission (SATC), The Value of Tourism, year ending Dec 2023

¹² South Australian Tourism Commission [website](#)

¹³ South Australian Tourism Commission (SATC), Visit to Regions report for the year ending March 2024; Viticulture and wine sector working group final report July 2024, Australian Government 2024

¹⁴ Export Report, 12 months to 30 June 2025, Wine Australia 2025

¹⁵ Viticulture and wine sector working group final report July 2024, Department of Agriculture, Fisheries and Forestry, Australian Government, 2024, CC BY 4.0

¹⁶ Viticulture and wine sector working group final report July 2024, Department of Agriculture, Fisheries and Forestry, Australian Government, 2024, CC BY 4.0

¹⁷ Ibid

The industry spans agriculture (wine grapes), manufacturing (winemaking) and sales into a global marketplace. Sales growth is driven by exports through the main channels of off-premise (supermarkets and wine retail) and on premise (restaurants, clubs, pubs) venues, often through company owned distribution channels.

Wine producers commonly employ persons in any number of the following occupations:

- agriculture (grape growing)
- manufacturing (winemaking)
- science (laboratory)
- retail (cellar door sales)
- horticulture (nursery)
- food and beverage (cellar door / café & restaurant)
- administration (clerks)
- barrel manufacturing (coopers)
- warehousing and packaging (store persons)
- transport of grapes & bottled wine (drivers)
- maintenance (mechanics & welders)
- planning & technical production / tasks (engineers) and
- other professionals (accountants, sales, marketing, export professionals)

The wine industry is not just an agricultural industry, it also has manufacturing operations and tourism and hospitality operations.

Given the great diversity of roles, combined with the emphasis on tradition, history and heritage, innovation and technological advancement is not uniform across streams and occupations in the wine industry.

In the viticulture stream of the industry, i.e. growing and cultivation of wine grapes, and related roles e.g. viticulturist, vineyard manager, vineyard worker and vineyard hand this still involves a large degree of traditional manual work. This includes digging, installing and repairing posts and trellising, bird netting, planting and pruning of vineyards. During the vintage (harvest) season hand may be a feature in relation to premium wines. In terms of machinery and equipment, harvesters, tractors and sprayers are being used.

Many of SAWIA's members are located in rural and regional South Australia and experience difficulties accessing and attracting unskilled, semi-skilled and skilled labour on a temporary or permanent basis. However, there are differences between regions, with regions further away from the metropolitan area generally finding it more challenging filling staff vacancies. This includes wine regions such as Clare Valley, Riverland, Coonawarra, Mount Benson, Robe and Kangaroo Island.

In SAWIA's experience, finding labour in regional locations is equally challenging whether it is a tractor driver, a vineyard hand, a cellar hand working in the winery, a warehouse employee or a cellar door sales employee.

The South Australian Wine Industry Snapshot 2024, a joint initiative by SAWIA and Bentleys SA, to document the challenges faced by individual wine businesses in South Australia and to highlight business strategies that could help manage these challenges, provide key insights in relation to workforce challenges in the industry.

Previous Snapshots have reported difficulties in attracting and retaining staff, and according to the 2024 Snapshot this challenge persists, with 73% of respondents reporting difficulty. The situation has worsened since 2023 (60%). The greatest staffing difficulties were reported for vineyard operators/viticulturists (20%) and cellar door sales staff (18%).

In addition to the Snapshot, SAWIA get regular industry feedback and intelligence from the membership in relation to this. One such way is via our People & Workforce Committee, comprising of Senior HR Managers and professionals representing a mix of Australia's largest wine producers to medium and small businesses. This has further reinforced both the survey evidence and the specific challenges in relation to wine industry positions.

It is therefore surprising to learn that according to the JSA's Occupation Shortage List¹⁸, none of the following three OSCA/ANZSCO positions are in any shortage, in any State.

ANZSCO	Occupation	AUS	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
363117	Vineyard Supervisor	NS	NS	NS	NS	NS	NS	NS	NS	NS
842222	Vineyard Worker	NS	NS	NS	NS	NS	NS	NS	NS	NS
121617	Wine Grape Grower	NS	NS	NS	NS	NS	NS	NS	NS	NS

We acknowledge the significant work undertaken by Jobs and Skills Australia (JSA) to produce the Occupation Shortage List (OSL). The methodology is robust and data-driven, combining modelling, employer surveys, and stakeholder feedback to provide a consistent national perspective on labour market conditions.

However, there are several factors that may mean the OSL does not fully reflect workforce pressures in niche, regional industries such as wine production.

Firstly, while wine industry positions are regularly and publicly advertised, the OSL methodology applies statistical modelling at broad occupational group levels. This means that recruitment challenges for highly specialised wine industry roles can be diluted or masked when they are combined with other, unrelated occupations.

For example, recruitment data for *viticulturists* or *cellar door professionals* may be aggregated into broader categories that also include roles with very different skills and labour market conditions. This can result in a shortage signal not being clearly identified by the modelling, even where there is strong recruitment activity and well-documented hiring difficulty. This aggregation can obscure genuine shortages, resulting in policy decisions that fail to target the roles most critical to regional industries like wine production.

Secondly, there is a structural challenge with the Occupation Standard Classification for Australia (OSCA, formerly ANZSCO). OSCA does not currently include a number of key roles that are essential to the wine industry, especially those related to cellar door operations and direct-to-consumer sales. This has implications for both workforce planning and migration pathways. For example, there are currently no designated classifications for Cellar Door Manager or Cellar Door Worker, despite these being critical positions for wine tourism and business viability.

Thirdly, our industry-specific data consistently shows significant and increasing workforce pressures. In addition, just last week, a specialist recruitment consultant recruiting nationally for wine industry professional roles unprompted highlighted viticulturists as particularly challenging to recruit, reinforcing the consistent message we receive from our members.

While the OSL provides a valuable national perspective, it may not fully capture the complexities of small, regional, and specialised industries like wine production. These gaps could be addressed by:

- Including additional data sources, such as industry-specific surveys.
- Actively considering feedback from representative industry bodies.
- Reviewing and updating OSCA to ensure key roles, such as those in cellar door operations, are accurately classified.

SAWIA would welcome the opportunity to collaborate with JSA to refine future OSL processes, ensuring they more accurately represent the wine industry's workforce needs and better support regional economies and tourism.

¹⁸ JSA 2025, <https://www.jobsandskills.gov.au/data/occupation-shortages-analysis/occupation-shortage-list>

The role of OSCA and challenges for Cellar Door roles

The Australian Bureau of Statistics developed ANZSCO (now OSCA) to enable “storing, organising and reporting occupation-related information in both statistical and other analytical applications”¹⁹.

However, it was not originally designed to determine migration outcomes. This misalignment has created barriers for industries, including the wine sector, that require skilled migration in roles that do not fit neatly into existing classifications.

Although OSCA has undergone recent reviews and updates, its fundamental structure still limits migration pathways for occupations not officially recognised. Unless a position exists within OSCA or is included under a Designated Area Migration Agreement (DAMA), it remains ineligible for skilled migration sponsorship. This issue is particularly problematic for South Australian wineries, which depend on cellar door professionals to support tourism and direct-to-consumer sales.

SAWIA has previously advocated for the inclusion of key wine industry roles in skilled migration programs, including cellar door occupations. The lack of recognition for these roles within OSCA means that businesses struggle to secure the workforce needed to sustain and grow their operations.

Cellar doors are a vital customer interface in the wine industry, providing a direct-to-consumer (DTC) sales channel through wine tastings, education, food pairings, and direct sales. There are approximately 340 cellar doors in South Australia, which are crucial for maintaining wine tourism and consumer engagement.

Despite their importance, there is currently no appropriate classification within OSCA for key cellar door roles, preventing wineries from accessing skilled migration pathways to fill these positions. The absence of a designated occupation for Cellar Door Manager, Cellar Door Supervisor, or Cellar Door Employee exacerbates staffing challenges, impacting business operations and customer experience.

The direct-to-consumer (DTC) sales channel includes various modes of selling directly from the wine producer to the consumer without intermediaries. These modes include winery websites, mailing lists, wine clubs, cellar doors, on-site winery restaurants and events. The DTC channel is particularly attractive because it allows wine businesses to build direct relationships with customers and capture the full retail margin, making it the most profitable sales channel. This sales channel had the highest percentage of businesses who achieved stability or growth in both volume (22% stable and 49% increase) and value (25% stable and 47% increase).

Tourism significantly contributes to DTC sales and offers an opportunity to recruit new customers. The cellar door sales channel heavily relies on tourism, not just in terms of volume but also the origin of visitors, which influences visitation preferences and expenditure patterns.

The ability to convert visitors into long-term customers is crucial to sustaining wine sales, making knowledgeable and skilled cellar door staff essential. However, 73% of wine businesses reported difficulties in recruiting staff in 2024, an increase from 60% in 2023. Cellar door positions were the second most difficult to fill, with 18% of respondents citing recruitment challenges²⁰.

To address these critical workforce shortages, SAWIA seeks the addition of the following two non-OSCA positions to the South Australian DAMA:

Given that these roles are integral to the wine industry, and there is clear evidence of ongoing shortages, their absence from OSCA presents a significant gap.

Vineyard positions

The Vineyard Supervisor position (343137) is included in the “Targeted for Consultation Group” as part of this wider consultation.

¹⁹ ABS 2006, 1220.0 - ANZSCO - Australian and New Zealand Standard Classification of Occupations, First Edition, 2006

²⁰ SAWIA and Bentleys SA 2025, 2024 South Australian Wine Industry Snapshot

This position underwent major updates by ABS via the joint ABS and Federal Department of Agriculture's review of agricultural occupations in 2023 and 2024. SAWIA was actively involved in this process, providing input into consultations and feedback on drafts.

This position is a key position in the wine industry, supervising aspects of vineyard operations.

In addition, the review of ANSCO also resulted in changes to the Vineyard Worker position (841142), responsible for routine vineyard work.

The Wine Grape Grower position (151237) is a degree qualified position, with technical expertise and management responsibilities for the planting and establishment of vineyards, planning and management of vineyard operations.

Recommendations

To improve the accuracy and usefulness of the Occupation Shortage List (OSL), particularly for regional and specialised industries like the wine industry, SAWIA recommends that Jobs and Skills Australia:

1. **Broaden the evidence base for workforce analysis**
 - Supplement national vacancy and modelling data with industry-specific surveys and datasets to capture recruitment challenges that may not be visible in broader statistics.
 - Consider regional labour market intelligence, where available, to better reflect the experiences of industries operating outside metropolitan areas.
2. **Strengthen engagement with industry representatives**
 - Establish regular consultation channels with peak industry bodies, such as SAWIA, to validate data and provide context for local workforce trends.
 - Use these insights to test assumptions, identify emerging shortages, and support more accurate and timely updates to the OSL.
3. **Ensure occupational groupings in modelling reflect real-world distinctions**
 - Refine how the OSL's modelling aggregates occupations to differentiate between specialised roles, such as viticulturists and cellar door professionals, which currently risk being masked within broader categories.
 - Report on shortages at a level that enables targeted workforce planning and policy development.

By implementing these actions, JSA can strengthen the OSL's capacity to reflect actual workforce needs. This will ensure that migration and workforce policies are informed by accurate, nuanced data and that they support the sustainability of key industries contributing to regional economies and Australia's export and tourism sectors.

END OF SUBMISSION