



Program for the pre-AARES conference workshop on

The world's wine markets by 2030: terroir, climate change, R&D and globalization

Adelaide Convention Centre (www.adelaidecc.com.au)
North Terrace, Adelaide, South Australia

7-9 February 2010

Sunday 7 February

09.00 – 17.30 Wine region tour, Barossa Valley

Monday 8 February

08.30 – 09.00 Registration

09.00 – 10.30 **Plenary A: The wine industry in a changing global environment**

1. Welcome and introduction to wine industry challenges for the next 20 years,
by *Kym Anderson*, University of Adelaide
2. Welcome and outline of University of Adelaide's Wine 2030 Network,
by *Christopher Findlay*, Head of Economics and Convenor, Wine 2030 Network
3. Prospects over the next two decades for smaller, fine wine companies,
by *Brian Croser*, Tapanappa Wines
4. New World vs Old World success in global wine markets by 2030,
by *Andrew Jefford*, Wine Writer in Residence and freelance journalist

10.30 – 11.00 Tea/coffee

11.00 – 12.30 **Parallel Contributed Papers I**

CP Session 1a: Viticultural developments

1. Julian Alston, Kate Fuller, James Lapsley, and George Soleas, "Nature versus nurture in the California wine industry: causes and consequences of high brix grapes and high alcohol wine"
2. Nick Vink, A. Deloire, V. Bonnardot and J. Ewert, "Terroir, climate change, and the future of South Africa's wine industry"
3. Sarah Wheeler and Peter Crisp, "Benefits and costs of organic and conventional grape production in the Clare Valley, SA"

CP Session 1b: Consumer preferences

1. Bradley Rickard, “Introducing wine into grocery stores: Economic implications and transitional issues”
2. Don Cyr and Joseph Kuschner, “Optimal size in the Californian wine industry: a survivor technique analysis of 1984 to 2009”
3. Mitch Wolf and Marianne McGarry Wolf, “Consumer interest in a new wine bar to capture off-premise sales growth in Finland”

12.30 – 13.30 Lunch

13.30 – 15.00 Plenary B: The vineyard: resources, climate, and technology

1. Environmental sustainability concerns to 2030,
by *Cecil Camilleri*, Yalumba Wine Co.
2. Climate change to 2030: vines vs other crops,
by *Snow Barlow*, University of Melbourne
3. Prospects for growth and adaptation by 2030 via R&D,
by *Sakkie Pretorius*, Australian Wine Research Institute

15.00 – 15.30 Tea/coffee

15.30 – 17.00 Parallel Contributed Papers II**CP Session 2a:** Consumer tastes

1. Katy Westgaard and Marianne McGarry Wolf, “The use of social networking websites to develop a marketing plan for direct to consumer wine distribution targeted to the millennial wine consumer: case study”
2. Roberta Veale and Pascale Quester, “Sensing or knowing? Investigating the influence of knowledge and self confidence on consumer beliefs regarding the effect of extrinsic cues on wine quality”
3. Marianne McGarry Wolf and Mollie Thompson, “The importance of the information on the back label of a wine bottle on the purchase decision”
4. Mattia Cai and Luca Rossetto, “Does good wine need any bush? Wine education in student tastings”

CP Session 2b: International competitiveness in wine

1. William Amspacher, “The world’s wine markets by 2030: who will be shipping and to whom?”
2. Guenter Schamel, “Quantity vs. quality: an analysis of wine export strategies into the U.S. market”

3. Euan Fleming, Rolf Mueller and Franziska Thiemann, “The ‘digital grapevine’ and the global flow of wine: a gravity model of ICT in wine trade”
4. Johan van Rooyen, Indie Stroebel and Dirk Esterhuizen, “Analysing trends in the competitiveness of the wine industry: the South African case”

18.00 Wine tasting and dinner at the Balcony, Strathmore Hotel, North Tce.

Tuesday 9 February

09.00 – 10.30 **Plenary C: The wine market: globalization and governments**

1. Strategies for wineries over the next two decades,
by *Peter Hayes*, Vice-President and immediate Past-President, International Organisation of Vine and Wine (OIV)
2. Wine consumer taxation reform,
by *John Freebairn*, University of Melbourne
3. Export demand shocks and WET reform: regional consequences for Australia
by *Kym Anderson*, University of Adelaide (joint with *Ernesto Valenzuela*, University of Adelaide, and *Glyn Wittwer*, Monash University)

10.30 – 11.00 Tea/coffee

11.00 – 12.30 **Parallel Contributed Papers III**

CP Session 3a: Alcohol demand analysis

1. Leslie J. Butler, Sara Savastano and Marianne McGarry Wolf, “The world’s wine markets by 2030: what do we know about price and income elasticities of demand for wine?”
2. E.A. Selvanathan and Saroja Selvanathan, “An econometric analysis of wine consumption in Australia”
3. Jan Bentzen and Valdemar Smith, “Developments in the structure of alcohol consumption in OECD countries”

CP Session 3b: Designations of origin/geographical indications

1. Silvia Gatti, “Designations of origin and world development in wine production systems and wine markets”
2. Luca Rossetto, Vasco Boatto and Luigino Barisan, “Changing the geographical indications of Prosecco: chances, risks or threats?”
3. Kym Anderson, “Varietal intensities and similarities of the world’s wine regions”

12.30 – 13.30 Lunch

13.30 – 15.00 **Parallel Contributed Papers IV**

CP Session 4a: Tax issues, and health

1. Kym Anderson, “Excise and import taxes on wine, beer and spirits: an international comparison”
2. Jan Bentzen and Valdemar Smith, “Alcohol consumption and liver cirrhosis mortality: new evidence from a panel data analysis for sixteen European countries”
3. Cecilia Karmel, “Heart disease, cirrhosis of the liver and changing alcohol consumption in ten countries, 1960-2007”

CP Session 4b: Wine investment, and new markets

1. Rachael Goodhue, Jeffrey LaFrance and Leo Simon, “We should drink no wine before it’s time”
2. Philippe Masset and Jean-Philippe Weisskopf, “Wine investment: impact of the crisis and outlook”
3. Armando Maria Corsi, Nicola Marinelli and Veronica Alampi Sottini, “Italian wines and Asian markets: opportunities and threats under new policy scenarios and competitive dynamics”
4. James Simpson (presented by Jim Lapsley), “Vertical integration and the development of commercial wine production in Argentina, Australia and California, c.1870-1914”

15.00 – 15.30 Tea/coffee

15.30 – 17.00 **Plenary D: Innovative approaches to returning to prosperity: Panel chaired by Julian Alston with Peter Hayes, Terry Lee and Nick Vink**

17.00 Close

A joint initiative of the *Australian Agricultural and Resource Economics Society*
in collaboration with the *University of Adelaide’s Wine 2030 Network*
and the *American Association of Wine Economists*

Register online at www.alloccasionsgroup.com/AARES2010
View contributed papers at
www.adelaide.edu.au/cies/research/wine/Papers_conf.html

Bios of plenary speakers at the workshop on the world's wine markets by 2030

Julian Alston is a Professor of Agricultural and Resource Economics at the University of California, Davis, and Director of that university's Center for Wine Economics at the Robert Mondavi Institute for Wine and Food Science.

Kym Anderson is the George Gollin Professor of Economics at the University of Adelaide, and Chief Investigator on a GWRDC research project on Australia's place in the World's wine markets by 2030.

Snow Barlow is the Professor of Horticulture and Viticulture at the University of Melbourne in Victoria, past President of Federation of Australian Scientific and Technological Societies, and a member of the Australian Prime Minister's Science, Engineering and Innovation Council.

Cecil Camilleri, PhD is the Manager, Sustainable Wine Programs, at the Yalumba Wine Company, Angaston in the Barossa Valley of South Australia.

Brian Croser is the CEO of Tapanappa Wines and founder and former CEO of Petaluma Wines, as well as former Chairman of the Winemakers' Federation of Australia.

John Freebairn is a Professor and Ritchie Chair of Economics at the University of Melbourne, and a former Associate Commissioner on the Productivity Commission's enquiry into wine consumer taxation in Australia.

Peter Hayes is Vice-President and immediate Past-President, International Organisation of Vine and Wine (OIV), Paris; Chairman, CRC for Irrigation Futures; and Board Member, GWRDC (having formerly been CEO, GWRDC; Acting CEO, CRCV; Director of Viticulture, Rosemount Estates; and Industry Affairs Manager, Southcorp Wines).

Andrew Jefford is currently on a 12-month assignment as a Senior Research Fellow in the School of Economics and Winewriter in Residence to the Wine 2030 Research Network at the University of Adelaide, and is a wine judge and freelance drinks journalist and broadcaster, in particular for the *Evening Standard*, BBC Radio Four, *Decanter* and occasionally the *Financial Times*, and author of twelve books including *The New France*.

Sakkie Pretorius is the Director of the Australian Wine Research Institute at the Waite campus in the Adelaide suburb of Glen Osmond and Affiliate Professor at Adelaide University's School of Agriculture, Food and Wine. Prior to 2004 he was Professor and Chairman of the Department of Microbiology, Professor in Wine Biotechnology, and Director of the Institute for Wine Biotechnology at the University of Stellenbosch in South Africa.