

A partnering initiative between:





Australian Distillers Association The Western Australian Distilling Strategy is an industry driven roadmap to guide development of the State's craft spirits sector over the period 2025-2030.

It has been made possible through the leadership of the Western Australian Distillers Guild, Australian Distillers Association, and support from the Department of Primary Industries and Regional Development (DPIRD).

The Strategy reflects the aspirations and vision of the industry. It has been developed by consulting firm ACIL Allen through an extensive program of industry consultation, which included individual meetings with distillers from around the State, two industry surveys, and three industry workshops to ensure that the final Strategy was industry-led. Industry engagement in this project was high, with 50% of the industry stakeholders having participated in one or more of these engagements.

#### **STRATEGY PARTNERS**

The WA Distillers Guild (WADG) is an association formed to support WA distillers and promote the awareness, purchase and consumption of spirits that have been distilled in Western Australia.

The Australian Distillers Association (ADA) is the peak industry body for Australian craft distillers. The ADA aims to speak with one voice to effectively campaign for reforms to promote the Australian distilling industry and end discrimination to the spirits category.

The Department of Primary Industries and Regional Development (DPIRD) strives to cultivate and preserve Western Australia's agriculture, food industry, and aquatic resources while also building vibrant regional communities with flourishing economies.



Australian
Distillers
Association



#### **ACKNOWLEDGEMENTS**

This document is a brief summary of a comprehensive report commissioned by DPIRD on behalf of the strategy partners. The comprehensive report was prepared by independent economics, policy and strategy advisory firm ACIL Allen. For further information on the detailed findings in the comprehensive report, please email foodindustryinnovation@dpird.wa.gov.au.

ACIL Allen, the Department of Primary Industries and Regional Development, Western Australian Distillers Guild and Australian Distillers Association acknowledge the Traditional Custodians of Country of the many lands that we work on.

We recognise their continuing connection to the land and waters. We recognise the continuing culture of Aboriginal people and the contribution they make to the life of Western Australia's regions, and we pay our respects to Elders past, present and emerging.

Comprehensive strategy document prepared by:



# Messages from the Partners



Holly Klintworth,
President - Australian
Distillers Association
(ADA)

The Australian Distillers
Association is proud to
stand alongside the WA
distilling community in
delivering this industryled strategy. Developed
through extensive
consultation with
producers across the state,
this roadmap captures the
priorities and aspirations
of WA distillers and
positions them to thrive
in premium markets, both
locally and globally.

This strategy reflects the sector's strong sense of identity and its appetite for growth. It also highlights the value of collaboration between distillers, their peak bodies, and government towards shared goals. We commend the leadership shown by WA's distillers and look forward to continuing to support the industry as it realises the opportunities set out in this strategy.

James Young,
President - Western
Australian Distillers Guild
(WADG)

This strategy is a landmark moment for WA's distilling industry—crafted by industry, for industry. The WA Distillers Guild is proud to have played a central role in ensuring the strategy reflects the voice of our members and the broader distilling community across the state. Our producers are united by a commitment to quality, innovation, and sustainability, and this strategy gives us a shared path forward.

We thank all distillers who contributed their time and insights throughout the consultation process. The strategy highlights our collective ambition and showcases WA's potential to become a global benchmark for premium spirits. We look forward to working with industry and government to bring its vision to life.

Heather Brayford,
Director General Department of Primary

Department of Primary Industries and Regional Development (DPIRD)

The Department of Primary Industries and Regional Development is pleased to support the development of this industry-led strategy, which reflects the insights and direction provided by WA's distillers. It demonstrates what is possible when industry works cooperatively with government to identify common issues, opportunities and challenges to lead its own destiny.

The department is pleased to partner with the Australian Distillers Association and the WA Distillers Guild to support the sector's continued growth. The strategy aligns strongly with the State Government's economic diversification agenda 'Diversify WA: Future State' and highlights the role of craft distilling in building strong regional economies and premium global brands. We commend the industry for its leadership and vision.



# From the Minister

Western Australia's distilling industry embodies the innovation, quality, and entrepreneurial spirit that define our state's economic future. This industry-led strategy sets a clear course to elevate WA spirits on the global stage, generating new opportunities for local producers, regional communities, and the broader economy.

The Cook Government remains committed to supporting initiatives that drive economic diversification and value-added manufacturing. The Government's Made in WA Plan reinforces our focus on fostering industries that transform local resources into premium, high-quality products. Likewise, Diversify WA: Future State economic development framework outlines our ambition to build a more resilient economy by backing sectors such as premium food, beverages, and tourism that play to our natural strengths.

This strategy, developed through extensive consultation with WA distillers, aligns with these objectives by prioritising quality, sustainability, and global market growth. It reflects the collaborative efforts of producers, peak industry bodies, and government partners working together toward a shared vision of excellence.

I commend the WA Distillers Guild, the Australian Distillers Association, and all contributors for their leadership and dedication. Together, we are positioning Western Australia as a premier destination for world-class spirits—strengthening our economy and creating lasting opportunities for the future.



Honourable Jackie Jarvis MLC
Minister for Agriculture and Food;
Fisheries; Forestry;
Small Business: Mid West



# **Crafting Tomorrow's Industry**

The Western Australian Distilling Strategy charts a bold course for the State's craft spirits sector from 2025 to 2030. Developed through strong industry leadership and extensive consultation, it provides a clear roadmap to guide growth, strengthen the industry's foundations, and position WA as a global competitor in premium, provenance-based spirits.

Although WA's distilling industry is still emerging, it is ambitious, innovative, and rapidly growing—now home to around 90 small to medium-sized distilleries across the State. It is defined by its strong sense of place, commitment to quality, and deep reliance on locally sourced ingredients such as grains, grapes, botanicals, and bush foods. These strengths, paired with a collaborative industry culture and rising global demand for premium, craft spirits, create a powerful platform for growth.

The Strategy is underpinned by a detailed analysis of the sector's current position. Extensive engagement—including individual interviews, surveys, and workshops involving around 50% of WA's distillers—helped identify the key strengths, challenges, and opportunities shaping the future of the industry.

Strengths include access to unique local ingredients, strong community support, and a shared drive for innovation and craftsmanship. At the same time, the industry faces barriers such as limited economies of scale, workforce shortages, regulatory complexity, and the need for stronger brand recognition and market access.

Opportunities include growing consumer interest in provenance, premium spirits,

and immersive tourism experiences, expanding into national and export markets, and attracting investment aligned with sustainability and innovation. Realising this potential will require a coordinated effort to build industry capability, strengthen supply chains, and tell a unified, compelling story about WA spirits.

The Strategy provides a framework for action through four key strategic priorities. These are supported by an implementation plan focused on both long-term progress and early wins. Initial actions include advocating resourcing for implementation, the creation of a data strategy to inform decision-making and track progress, and the launch of targeted initiatives—such as improving cross-agency communication, developing a marketing plan, supporting tourism integration, and identifying key support programs for local distillers.

Led by the Australian Distillers Association and the WA Distillers Guild, with support from the Department of Primary Industries and Regional Development (DPIRD), the Strategy reflects the vision, needs, and energy of the industry itself. It lays the foundation for a sustainable, globally recognised WA distilling industry—one that is driven by place, shaped by quality, and united by purpose.



The industry is playing an important role in helping to enhance Western Australia's reputation as a food and beverage tourism destination. The aim of this strategy is to support its continued growth and achieve the industry's goal to raise the profile of Western Australian distilled products in local markets and overseas to increase their market share.

Recognition of the potential value of the distilling industry to the WA economy and concerns over industry growth barriers have been key drivers behind the development of this strategy. Its findings provide a clear, coordinated approach sanctioned by industry with implementation potentially assisted by

relevant government and industry effort at local, State and Federal levels. Shaped by the voices of the industry, the WA Distilling Strategy charts a bold path for the evolution of craft spirits manufacturing and tourism over the next five years. It is a future-focused blueprint that aligns with the sector's goals, challenges, and ambitions—designed to fuel growth, innovation, and long-term resilience.

Industry feedback formed the basis for developing the vision, mission, and goals that will guide collaborative efforts over the next five years. The vision is an aspirational statement for industry to strive towards over the Strategy period.

# **Industry Insights**

The Western Australian distilling industry is an emerging industry and an important part of WA's regional economy and food and beverage supply chain. Made up of around 90 small to medium distillers, just under half are located in regional areas of the State, with a further 11 per cent located in the Swan Valley and the Perth Hills.

The sector is led by enthusiastic producers crafting primarily gin, but increasingly also whisky, rum, vodka and other spirits—often using local botanicals and WA-grown ingredients. While still in its early stages, it's gaining growing recognition for its innovation, authenticity, and strong connection to place. Industry engagement reveals a number of strengths and weaknesses, coupled with opportunities and threats in its operating environment. Despite being an emerging premium product category, it faces growth challenges posed by the industry's limited scale.

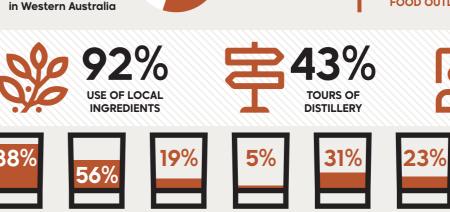
WA distillers are producing award-winning spirits, building immersive cellar door experiences, and contributing to regional manufacturing, hospitality and tourism.

The industry is aligned with several global growth trends including:

- rising demand for premium, craft spirits
- · interest in provenance and sustainability
- · growth of food and drink-based tourism.



Whisk(e)y



23% 27%
Limoncello Premixed Spirits Other

# **Opportunities** and Challenges

Western Australia offers an ideal setting for premium spirit production. Distillers here work with exceptional ingredients, a pristine environment, and the freedom to innovate—backed by a culture of craftsmanship and a deep connection to place.

These qualities set WA apart, positioning it as a serious contender in the global craft spirits' market. WA also holds unique advantages, including a strong production environment, access to highquality grains and botanicals, and a growing reputation for premium, smallbatch products. Despite this potential, the sector faces several challenges and barriers to growth.

These include:

- · access to investment
- regulatory complexity
- · a lack of coordinated branding and industry infrastructure
- · operating below capacity
- connecting to global markets
- attracting targeted government support.

### Western Australia Distilling Industry SWOT Summary

### **STRENGTHS**

- Unique local ingredients
- Community support
- Industry collaboration
- Quality, innovation and craftsmanship



### **WEAKNESSES**

- Economies of scale
- Workforce attraction and retainment
- Logistics/distance from markets
- Reputation/brand



### **OPPORTUNITIES**

- Consumer interest
- National and export markets
- Spirits tourism
- Sustainability (waste, packaging, energy, etc)
- Investment attraction and readiness



#### **THREATS**

- Excise tax
- Regulatory environment
- cheaper imports
- Supply chain disruptions



# **Defining the Industry**

Behind every bottle lies a deeper story—one that facts and figures alone can't fully capture. While the industry landscape highlights where WA distilling stands today, it's the voices from within that reveal where it's headed. Through rich conversations with producers, innovators, and changemakers, four defining themes have come to light. These insights go beyond trends - they reflect the spirit of the industry itself and have shaped a strategy designed to unlock its full potential.

## Unique

WA's unique setting is reflected in the taste of the spirits that are made here. The climate, weather, bush foods and clean, green environment all come together to produce a product that is uniquely Western Australian. Local distilleries are an increasingly part of the unique experience of visitors to Western Australia.

### Premium

WA's distillers are focused on the production of a premium product. Growing the reputation of the industry through the quality of the spirits produced, the use of local ingredients and inputs, the choice of bottles and labels, and the methods of production is a key focus for industry.

### Local

Nearly all of WA's distillers look to local ingredients to produce their spirits. The local supply chain forms an integral part of what makes WA spirits unique, from the grains, grapes and botanicals produced in the State's primary industries, to the bush foods that are sourced locally.

### **Emerging**

The industry has experienced rapid growth over the past decade to reach around 90 distillers. All are small to medium sized businesses, and many are owner operated with a focus on producing a boutique premium product that caters for consumers seeking premium experiences and locally made products.



- Competition from



Source: ACIL Allen

# A New Era of Premium Spirits

#### An industry with momentum



Western Australia's distilling sector has evolved from a handful of enthusiastic producers into a dynamic, emerging industry. United by a commitment to craft, provenance and quality, WA distillers are now looking outward—with a shared ambition to grow, scale, and lead.

#### From small-batch to state signature



WA producers are already building award-winning brands, attracting high-value tourism, and entering new markets. Their products stand confidently on quality—and apart through their story.

### The right product, the right moment



Globally, demand is rising for premium spirits with authenticity, sustainability and a strong sense of place. WA distillers are delivering all three—producing spirits that reflect their region, their ingredients, and their creative identity.

#### A future worth investing in



This strategy marks a pivotal moment. With strong industry leadership, clear direction, and growing consumer appetite, WA is positioned to become a globally recognised distilling region—one that reflects the best of what the State has to offer.

"WA has everything it takes—talent, terroir, and a great story.

Now is the time to bring it all together."

Industry workshop participant

# From Grain to Glass

Western Australia's distilling industry is built on strong local supply chains and regional connections. More than 90 licensed distilleries—nearly half located in regional WA—draw on local growers, foragers, suppliers and makers to craft spirits that reflect the character of their place.

This network supports jobs and small businesses across agriculture, manufacturing, hospitality and tourism. The 'grain to glass' story isn't just about ingredients—it's about the relationships, regions and craftsmanship behind every spirit. As distilleries grow as visitor destinations, they offer immersive experiences that bring this journey to life.

### Typical Grain to Glass Journey



**Grower / Producer** 



Distiller



Packaging & Cellar Door

### **Hospitality & Retail**



Visitor / Export Market



"When someone drinks a WA spirit, they're not just tasting what's in the glass. They're getting a flavour of where we live, what we grow, and how we do things here." "A strong distilling sector helps build up other industries agriculture, tourism, retail—it's part of a bigger picture."



# **Industry Insights**

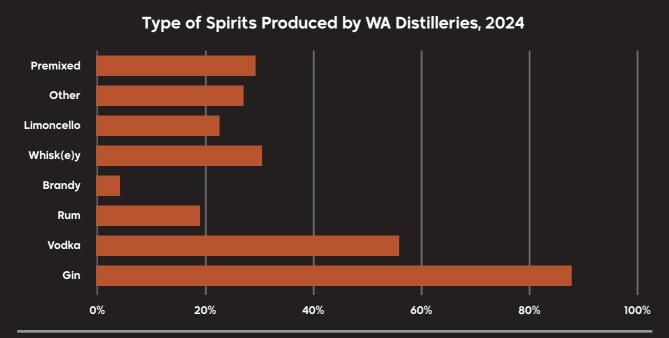
Hoochery Distillery opened in the Kimberley region in 1999 marking the start of the State's distilling industry. There are now around 90 small to medium sized distilleries with just under half located in regional areas of the state.

Western Australian distilleries comprise of approximately 12 per cent of Australia's spirit manufacturing businesses generating a revenue of approximately \$250 million assuming the industry also contributes the same share of revenue.

Promoting the uniqueness of WA spirits is a cornerstone of the industry with 92 per cent of distilleries claiming the use of

locally grown ingredients in their value proposition. The industry in Western Australia is focused on the production of gin and vodka.

Other distilleries cater for a variety of consumer tastes by producing whisk(e)y, premixed spirits in cans and bottles, limoncello, rum, and other spirits such as liqueurs.



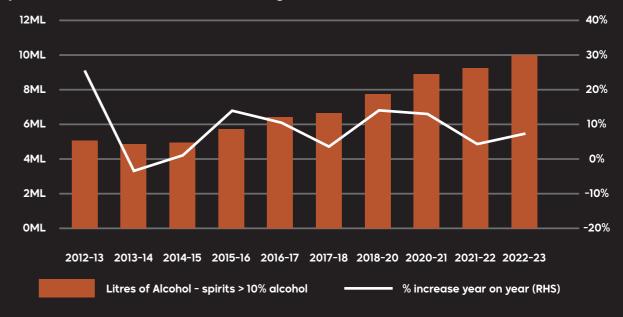
# **Industry Trends**

Nationally, the distilling sector is expanding. The total production of spirits and other excisable beverages in Australia doubled between 2012–13 and 2022–23, with most of this growth occurring since 2020. While the number of new distilleries is now stabilising, revenue growth continues, and exports are projected to rise to \$250 million by 2028–29.

Despite this momentum, WA producers face challenges linked to small scale, high production costs, logistics, and limited brand visibility outside of WA.

Regulatory complexity and the alcohol excise tax were identified as key constraints, particularly for distillers producing beyond the \$350,000 remission threshold.

#### Spirits and Other Excisable Beverages Production, Australia, 2012-13 to 2022-23



Source: Australian Taxation Office (ATO)



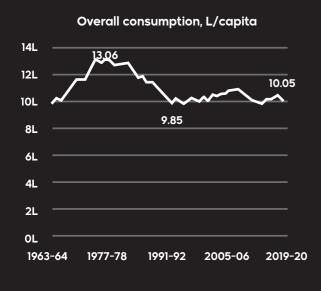
## **Consumer Trends**

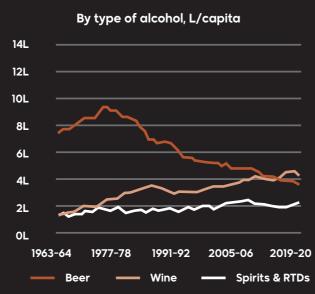
Total alcohol consumption in Australia has declined on a per capita basis over the past two decades—dropping from 10.7 litres in 2009–10 to 10.1 litres in 2019– 20. This decline is driven largely by changing social norms, increased health consciousness, and moderation among younger consumers.

At the same time, there has been a notable shift in what Australians drink. Per capita beer consumption has fallen steadily, while the consumption of spirits and ready-to-drink (RTD) products has remained relatively stable—around two litres per person—with upward trends since 2016–17. The increase in demand for spirits has been linked to several consumer preferences that align strongly with WA distillers' strengths:

- Support for locally made products
- Preference for premium quality and freshness
- Interest in sustainability and responsible production
- Desire for authenticity, transparency, and connection
- Strong appeal of immersive experiences like tastings, tours and education.

#### Consumption of Alcohol in Australia by Type and Overall, 1963-64 to 2019-20





Source: The Australian Institute of Health and Welfare, 2023

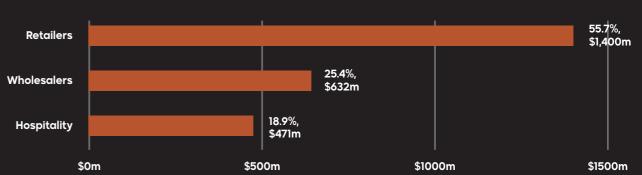
"Consumers are ferociously local. Not just buying local but wanting to know the provenance and the source of what they're drinking." Paul McLeay, Australian Distillers Association "There's been a revolution in the spirit industry. People now have a mindset of buying local and experiencing local." Kate Sinfield, Sin Gin Distillery

# **Market Access**

The majority of WA spirits are sold domestically through retail, wholesale, and direct-to-consumer channels such as cellar doors and online stores. In 2024, retail accounted for 56% of Australia's \$1.5 billion in distilled spirits sales.

Export remains a small but growing opportunity. WA contributed \$37 million in total alcoholic beverage exports in 2022—just 1.7% of Australia's total. The long shelf life, premium quality and provenance of WA spirits make them well-suited to international expansion, particularly in nearby Asian markets.

### National Spirit Industry Revenue by Market, 2024



Source: IBISWorld. 2024. Spirit Manufacturing in Australia



# Strategic Framework

### **INFORMED BY INDUSTRY, DESIGNED FOR IMPACT**

The WA Distilling Strategy has been informed through extensive engagement with industry, presenting a vision and set of goals for the industry, and the means by which it can achieve this aspiration to bring a taste of Western Australia to consumers at home and abroad.

### **Vision**

This vision is the aspirational goal for industry to work towards over the strategy period. It captures what industry hopes to be in the future.

Our spirits are recognised at home and around the world, providing a unique taste of Western Australia.

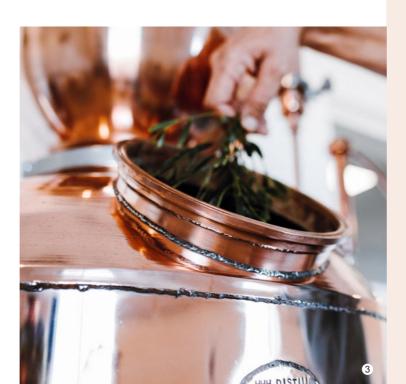
### **Mission**

This mission outlines how the industry will achieve its vision, emphasising collaboration to grow the sector into a sustainable, well-established industry. The mission supports the use of local ingredients to create a distinct taste of WA and highlights promotion as key to increasing the visibility and consumption of WA spirits.

We will work collaboratively to advance our industry, using locally sourced ingredients, sustainable practices, and promoting WA distilled spirits.

### Goals

- Sales growth Tripling the value and/or volume of WA spirits through growth in:
  - a) Domestic value and/or volume
  - b) International value and/or volume
- 2. Brand recognition Building the profile of WA spirits measured through:
  - a) Number of recognised awards
  - b) Domestic market share growth



# **Strategic Priorities**

These four priorities provide a clear roadmap for growth—focusing industry efforts where they matter most. Grounded in extensive consultation with producers across WA, they reflect a shared commitment to building capability, increasing visibility, and unlocking new market opportunities.

Advocate

Industry working together towards a common future to build the framework and structures to underpin industry development.

This priority is focused on building on the industry's current strengths and working to address potential external threats.

Adv

Advance

Building the framework for a profitable, safe, and sustainable industry by developing the capability of the workforce, operational guidelines, and innovative approaches to production and supply chain management.

This priority is focused on overcoming the challenges of being an emerging sector.

3

Promote

Promoting WA spirits to increase their market share through building the WA spirits brand and targeting activities that complement tourism initiatives, promote industry, and educate consumers about WA spirits.

This priority is focused on leveraging the industry's current strengths and pursuing opportunities to promote WA spirits to new markets.

Acces

Creating a pathway to new markets to build the reputation of WA spirits through identifying ways in which to increase the sale of WA spirits in Australian markets and to navigate export markets.

This priority is focused on capturing opportunities through accessing new markets locally and globally.



Strengthening leadership, coordination and the policy environment.

Clear governance, strong advocacy, and effective coordination are essential to deliver this strategy. This priority focuses on building the structures that support industry development—from representation and policy alignment to accessible information, evaluation, and cross-sector collaboration.

### **Initiatives**

Industry
Development
Officer

Through the support of Government, recruit an Industry Development Officer to drive the initiatives identified in the Strategy.

1.2

Cross-agency working groups

Build engagement with Government through cross-agency working groups including representatives from agencies responsible for agriculture and food, tourism, liquor industry regulation and safety, economic diversification, small business development, water and environmental regulation, local government, and planning to address industry priorities.

1.3

Develop a Data Strategy Build the systems and processes to identify and capture industry data.

1.4

Cross Industry Collaboration

Collaborate with other food and beverage producers to support the development of the broader food and beverage industry.



Building capability through skills, sustainability and innovation.

A strong and sustainable distilling industry depends on a capable, skilled and adaptable workforce. This priority focuses on supporting distillers to operate safely and professionally, adopt sustainable practices, and build the business capability needed to grow. It also includes developing career pathways, encouraging innovation, and strengthening industry resilience over the long term.

### **Initiatives**

2.1

Skills Development

Identify a distilling vocational education and training course and ongoing professional development courses.

2.2

Safety Culture

Develop WA specific distillery safety guidelines to educate and promote safe practices.

2.3

Industry Support

Identify and access Government and other support programs that promote industry growth such as professional development and market access initiatives.

2.4

Research and Development

Build partnerships with organisations to investigate opportunities for innovative production, sustainability and supply chain practices.

2.5

Supply Chain Development

Enhance the use of local inputs through initiatives that connect producers and suppliers such as networking events.



#### Elevating the WA spirits brand and consumer awareness.

Building the profile of Western Australian spirits—locally, nationally and globally—is critical to long-term growth. This priority focuses on strengthening the WA distilling brand, increasing market visibility, and promoting the provenance, quality and creativity that define the sector. It also supports greater alignment with tourism, education and events to grow awareness and deepen consumer connection.

### **Initiatives**

<b>3.1</b>	Brand Development	Develop an industry plan to build the brand and the story of WA spirits.
<b>3.2</b>	Destination WA	Work with national, state and regional tourism and industry promotion bodies to build spirits into tourism offerings.
<b>3.3</b>	Showcasing Industry	Develop an industry website and other initiatives to promote WA spirits and the broader supply chain.
<b>3.4</b>	Marketing Plan	Develop a marketing plan that focusses initially on the education and promotion of WA spirits to the public, retailers, pubs and restaurants.



Creating pathways to local and global markets for WA spirits.

Creating new pathways to market is essential for long-term growth. This priority focuses on increasing the sale of WA spirits across Australia and improving access to export markets - building the reputation and reach of WA spirits globally, and fostering a preference for purchasing local spirits over imported product.

### **Initiatives**

**Domestic Market** Access

To increase sales of WA spirits at events and in pubs, retail outlets and restaurants.

**Export Pathways** 

Work with DPIRD, Austrade and other government partners to facilitate cost effective access to international markets.

# Plan on a Page

### Vision

Our spirits are recognised at home and around the world, providing a unique taste of Western Australia.

### **Mission**

We will work collaboratively to advance our industry, using locally sourced ingredients, sustainable practices, and promoting WA distilled spirits.

### Goals

1. Sales growth

Tripling the value and/or volume of WA spirits through growth in:

- a) Domestic value and/or volume
- b) International value and/or volume.

2. Brand recognition

Building the profile of WA spirits measured through:

- a) Number of recognised awards
- b) Domestic market share growth.

### **Strategic Priorities Initiatives**

Ad

Advocate

- .1 Industry Development position
- 1.2 Cross-agency Working Groups
- 1.3 Data Strategy
- 1.4 Cross Industry Collaboration

2

Advance

- 2.1 Skills Development
- 2.2 Safety Culture
- 2.3 Industry Support
- 2.4 Research and Development
- 2.5 Supply Chain Development

3

Promote

- .1 Brand Development
- 3.2 Destination WA
- 3.3 Showcasing Industry
- 3.4 Marketing Plan



Access

- 1.1 Domestic Market Access
- .2 Export Pathways



