TASMANIAN

DISTILLED SPIRITS INDUSTRY BLUEPRINT



Acknowledgement of Country

The Tasmanian Whisky and Spirits Association acknowledges the Tasmanian Aboriginal people as the First People of lutruwita/Tasmania.

For over 2,000 generations, Tasmanian Aboriginal people's culture and language have been and continue to be based on deep and continuous connection to family, community and the land, sea, and waterways.



SOCIETY SALAMNCA Rosie Hastie



Like the fine products it produces, the whisky and spirits industry in Tasmania is maturing year by year.

It has now reached a point where the strategies and decisionmaking have moved from the sterling efforts of individuals to a whole-of-industry approach.

While the entrepreneurial spirit of individuals has been the hallmark of the industry in Tasmania, it now needs to build on their unity and ensure a clarity of purpose that will benefit each distiller and the sector as a whole, to build on the strong foundations and to protect and grow the Tasmanian brand.

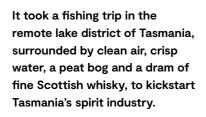
The blueprint will guide the industry to ensure the foundations for decision-making and strategic and shared growth are achieved. The blueprint has been developed with wide industry input, which you can read more about on the TWSA website. It represents the balanced interests of what is a diverse and vibrant sector and aims to align and support the whisky and spirits industry's shared priorities.

The key to success is simple. Increasing demand – both in domestic and export markets, with an emphasis on quality. This simple and shared ambition gives the industry an unrivalled opportunity to wrap our "Tasmanian" around everything it does on the national and world stage. The ambition is not just for growth but for sustainable growth. We value our local communities, through employment, building a more skilled workforce and sharing the bounty across Tasmania's regions through our supply chains. We are here for the long term and value the Tasmanian environment and the contribution we can make to Tasmania's renewable targets and best practices in all we do, from waste management to sustainable water usage and so much more.

Our starting point has been the intensively competitive domestic market where marketing is critical in building demand and spurring the continual growth of our product. Growth in value. Growth in quality. We are on the world stage because of our unique, quality product. The international awards continue to not just have us on the world stage, but centre stage. This blueprint lays the foundation for the next decade to ensure we maintain and enhance our global status.

Like all industries, we have opportunities and challenges, and we have many different paths we can take. The blueprint is our roadmap to ensure we continue to work together with a shared set of priorities and ambition for the next five years and beyond.

PREMIER'S FOREWORD



Since that trip more than 30 years ago, Tasmania's whisky has gone from strength to strength, going from a small, bespoke industry to now being a leader in the global distilling sector by producing some of the world's most awarded and sought-after whiskies.

It wasn't always easy, and our whisky industry had to work hard to overcome barriers, including amending the law to legalise distilling and adapting to Tasmania's geographic remoteness; however, thirty years on, Tasmania's distilling sector is flourishing.

Our clean air, water, and excellent local barley have made some of the world's best whisky. Equally, Tasmania's natural beauty and flora allow distillers to be exceptionally creative and utilise quality, local ingredients to produce their highly acclaimed gins.

Today, Tasmania's industry comprises more than 80 distilleries,

TASMANIAN

PREMIER,

ROCKLIFF

JEREMY

is worth almost \$424 million, produces some 3.2 million litres of spirits a year, employs more than 450 Tasmanians and, with record exports, it's clear that Tasmania has what the world wants: Tasmanian whisky and spirits.

The opportunity for the state's distillers to continue to take on the world is real, and there is no better time to strategically examine the future of the Tasmanian spirits industry. By taking a strategic, long-term approach, Tasmania can position its spirits industry to capture competitive advantages and grow trade, creating more jobs and opportunities in the industry for Tasmanians. With the assistance of the Tasmanian Government, the Tasmanian Whisky and Spirits Association has developed the Tasmanian Distilled Spirits Industry Blueprint to support sustainable distilling growth, innovation advancements, and the promotion and protection of the industry and Tasmanian brand.

In alignment with the Tasmanian Trade Strategy 2019-2025, including the goal to grow Tasmania's trade to \$15 billion by the year 2050, the Tasmanian Distilled Spirits Industry Blueprint supports the development of important commercial opportunities between Tasmania and our key trading partners around the world.

This blueprint aligns with our framework for the Tasmanian Government to work with industry across four key trade priorities:

- building trade in key sectors
- showcasing Tasmania in priority markets
- supporting trade logistics and market access
- building the export capabilities of Tasmanian businesses.

The Tasmanian Government is committed to helping distillers take their products to the world. We will continue to support diversification opportunities for our state and build industry capability so that Tasmania maintains trade growth and creates more jobs and investment in Tasmania for Tasmanians.

JEREMY ROCKLIFF

The TWSA Executive has been extremely proactive across a number of industry-defining initiatives as we lead our dynamic industry through the most dramatic growth phase of our thirty year history. This blueprint will be an evolving document as we meet the future challenges and opportunities of our industry.

The development of this document would not have been possible without the valued contribution of our selected industry member

TASMANIAN DISTILLED SPIRITS INDUSTRY BLUEPRINT

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TWSA PRESIDENT'S MESSAGE

It is with enormous pride that I can write a brief message about our inaugural Tasmanian Distilled Spirits Industry Blueprint.

I wish to thank my fellow TWSA Executive Members, Stephen Parry, Chris Condon, Jason Whalley, Rizk Mawass and Damian Mackey for their tireless contribution to our wonderful industry and the support of the development of this document. Also, I must mention the contribution of our outgoing Acting Chief Executive Officer, Mark Littler, who has been well supported by our TWSA Executive Officer Kate Akmentins in administering the blueprint process.

representatives on the Blueprint Steering Committee, wisely led by the Chair James Cretan and with invaluable experience provided from Wine Tasmania CEO Sheralee Davies. Thank you also to all of the people from across our industry that gave up their valued time to contribute their thoughts and ideas. I also wish to thank Kym Goodes from 3P Advisory for her brilliant facilitation in guiding the development of this blueprint and the Department of State Growth for their financial and ongoing support of this blueprint development and our broader industry.

This inaugural blueprint will help guide our whole industry to become environmentally sustainable, provide a safe environment for our workforce and visitors, while contributing to Tasmania's economic and social fabric through exports and jobs growth.

amenorFrett

CAMERON BRETT

CAMERON BRETT, SPRING BAY DISTILLERY



HARTSHORN DISTILLERY, GRANDVEWE CHEESES

"Hartshorn was born from a need to reduce waste & a desire to flip the script on traditional spirit-making & flip the bird to those who said it couldn't happen."

> RYAN HARTSHORN CO-FOUNDER AND HEAD DISTILLER

In 1838, Lady Jane Franklin encouraged her husband, the Governor, to prohibit distilling in Tasmania. The barley is unusually fine here, but Lady Jane said she would rather have it fed to pigs than turn men into swine.

Tasmania in a bottle

When the law changed in 1901, small-scale distilling remained illegal. A century and a half later, a man on a fishing trip with his father-in-law smelled Tasmania's clean air, splashed in its crisp waters, and noticed - not far away - a peat bog. Over a dram of fine Scottish whisky he asked himself: "Why is no one making this here?"

A local politician helped him amend the offending legislation. Some helpful Scots encouraged him, and this Tasmanian launched an industry in his kitchen.

But people thought he was crazy. They warned him not to bother. It wasn't just illegal. It was impossible Others said: "Let's have a dram and have a go."

There aren't many of us in Tasmania, so we have to invent our own way of doing things. We have to work together: to change a senseless law, to build something from the ground up - with our fine Tasmanian ingredients, a relentless focus on experimentation, cooperation, and a renegade spirit

Today it's about Tasmanians distilling this special place into something you can only taste in one of our bottles. It's about producers from around the world moving to Tasmania because it's far away from the sterile warehouses of the north, because of our air and water, our dramatic climate, our

charismatic creators. It's about discovering the magic in imperfect potatoes and sheep's whey and pepperberries. It's more about gumboots than tweed.

We're not taking ourselves too seriously. We're not trying to be anyone else. When it's Tasmanian, it tastes different. It will transport you to our bright summers, our dark winters, a cosy room with a fire burning or a walk in the bush. Our distillers are a community of artisans on an island of artisans. When you're here in Tasmania, you'll meet us on our properties. While others around the world press buttons, we largely make it by hand.

Every Tasmanian distiller is a walking story: tasting, trying, failing, trying again, and quietly making something extraordinary.

TODD BABIACK. CEO BRAND TASMANIA Jazz Upton



INDUSTRY SNAPSHOT



HELLFIRE BLUFF DISTILLERY

Samuel Shelley

TWSA members

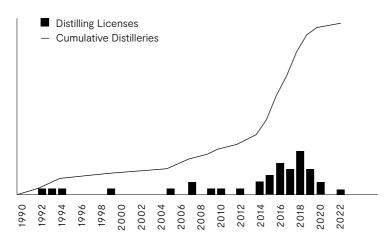
TWSA Members

57

Direct Employment

454 2022

Distillery Growth



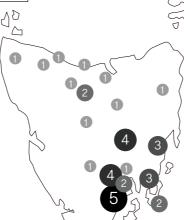
Estimated Value of Single Malt Under Maturation

^{\$}669m

(FY 21/22)







Distillery Locations

Projected Volume (L)

Projected Value (\$)

Forecast Growth (FY 23/24)

TASMANIAN DISTILLED SPIRITS INDUSTRY BLUEPRINT

Profile of products distilled

Projected Production Volume

 $3.2^{\,\rm million}_{\,\rm litres}$ (FY 22/23)

^{\$}424m

Projected Production Value

(FY 22/23)



Forecast Production Growth

MCHENRY

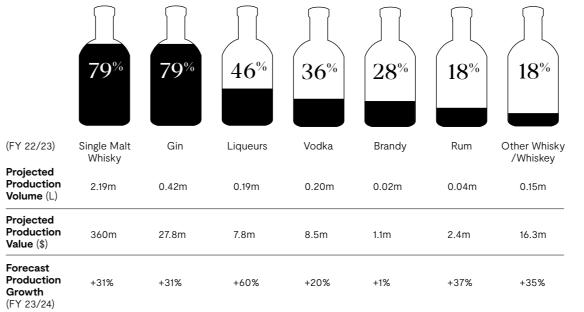
Tourism Australia

DISTILLERY

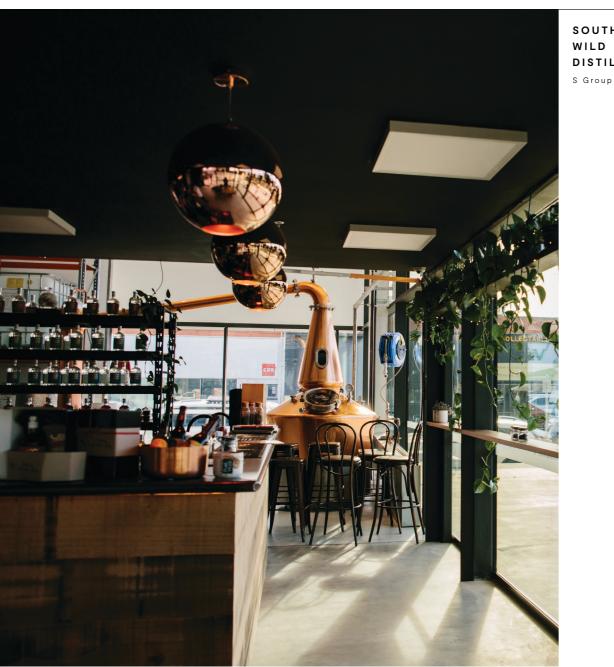


Spirit Products Distilled

% of Tasmanian distilleries producing each product







TASMANIAN DISTILLED SPIRITS INDUSTRY BLUEPRINT

SOUTHERN WILD DISTILLERY

Distilleries operating a cellar door

2022

2025 forecast

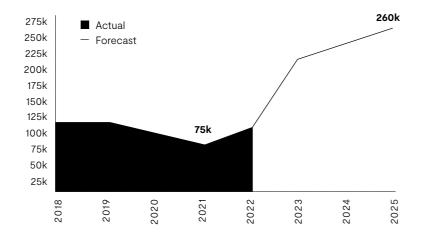
68%



Interstate and international visitors

Forecast increase in visitation from 2022 - 2025

 $^{+}102\%$



"From our renovated 150yr old tasting room, to our small batch whisky, gin & vodka, we believe 'Great Spirit is crafted by hand, not on a spreadsheet'."

ALCHYMIA DISTILLERY

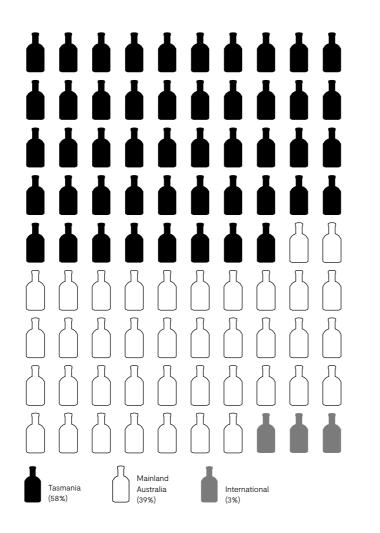
Ness Vanderburgh Tourism Australia



TAYLOR AND SMITH GIN

Lusy Productions

Estimated sales share by market (%)







INDUSTRY SNAPSHOT

"Supporting local island producers is part of my personalised approach to making spirits."

HEIDI WEITJENS -FOUNDER, KING ISLAND DISTILLERY

Strategic priority 1 – Investing in our people Strategic priority 2 - Market expansion and growth Strategic priority 3 – Curating, protecting and enhancing our brand

HEIDI WEITJENS Christian Fitzpatrick

OUR STRATEGY

Our Vision

Tasmania is globally renowned for premium new-world whisky and high-quality spirits production.

Our Strategic Priorities

Our Outcomes

A Tasmanian spirts and whisky industry, renowned for quality, leading in economic, social & environmentally sustainable practices across the value chain.

How we work together

The industry works in a collegial and unified way to ensure shared benefit and an influential industry body.

> TASMANIAN WHISKY WEEK, OLD KEMPTON DISTILLERY Lusy Productions





OVEREEM WHISKY TEAM Naomi Isherman Priority 1

Investing in our people

The strength and value of our industry comes from our people - the distillery owners and their workforce, both direct and indirect. Investing in the people that make this industry successful is critical, for their safety and wellbeing and for all our futures. First and foremost we need to provide a safe work environment for all our staff and a safe place for our valued distillery visitors. We need to foster innovation and leadership and create career and training pathways from entry level through to the business ownership. The culture of our industry is collegial and we want to ensure we continue to work together in an inclusive, highperforming and collaborative way and demonstrate the attractiveness of our industry to current and potential employees.

TASMANIAN DISTILLED SPIRITS INDUSTRY BLUEPRINT

Priority 1

Objectives

1. Ensuring workplace safety for our staff and visitors

2. Ensuring we are an industry of choice with clearly defined career pathways, training, leadership and innovation opportunities

3. Build the skills and knowledge of the industry, not just in production but in all aspects of the business.

Actions

As a priority, develop and deliver an industry-wide workplace safety, skills and training program.

Adapt the national work on current and future workforce requirements to a Tasmanian context. This includes workforce education and training options for current operators and staff.

Ensure opportunities for industry leadership and innovation through linkages with a range of leadership, research and development programs.

Promote career opportunities in the whisky and spirits industry as part of an overall workforce, public relations and communications strategy.

Work with Business Tasmania, Skills Tasmania and other relevant organisations to provide information and opportunities for skills and training in all areas of operations.

Work with Trade and International Relations within State Growth on export development opportunities and facilitating new in-market connections through the international business development network (IBDN).

Continue to provide an annual conference and the opportunity for regular networks and discussion forums.

"By respecting the past we have found the future."

JOHN IBRAHIM -FOUNDER, CALLING-TON MILL DISTILLERY

CALLINGTON MILL DISTILLERY, OATLANDS

Rob Burnet

Bill Lark.

OATLANDS, SPRING RAIN

Investing in our people

Callington Mill Distillery

Callington Mill Distillery started after its founder John Ibrahim purchased the historic Dysart House in Kempton. Dysart House then came to be leased by Redlands Distillery, now known as Old Kempton Distillery, which led to John becoming friends with

Whisky industry research and behind-the-scenes tours followed for John. He built his industry knowledge by establishing key relationships with other whisky makers in the state and internationally.

John had the vision to bring a new era of whisky to Tasmania a Tasmanian-built world-class 'Rolls Royce' distillery using cutting-

edge Tasmanian technology. In the historic town of Oatlands Tasmania, along with longstanding business partners Salim and Danny Nicholas, John founded the Callington Mill Distillery. (Interestingly, Callington Mill began operations in 1837 using the latest technology of the 1800s, and also has an illegal still on site.)

Unavailable in Tasmania and after years of looking internationally for a turnkey distillery, John began to work with Kolmark's Mark Kolodziej, a still maker and engineer in north-west Tasmania. Using what they learnt after a research trip to Cardona Distillery in New Zealand, Mark and John returned to Tasmania to build their turnkey distillery, developing cuttingedge Tasmanian equipment and

technology. Notably, John believed in Mark despite him being a novice: he is quoted as saying "the beginning of wisdom is emptiness". His leadership and trust in people to innovate have provided the Tasmanian whisky producers with a solution to keep up with industry demand.

Callington Mill Distillery now makes award-winning single malt whisky and gin. It also brings together the Tasmanian visitor experience on site and through its social media, providing the history of whisky making in Tasmania, and showcasing brand partners and local produce through its cellar door.

JOHN IBRAHIM AND RIZK MAWASS Nikki Davis

Jones





<u>Priority 2</u>

Market expansion and growth

The development of existing and potential domestic and international markets will increase demand and return for the industry. Improved consumer and market knowledge and understanding will ensure the industry can align product quality and volume to meet the projected demand.

HELLYERS ROAD DISTILLERY State Growth Tasmania . .

Priority 2

Objectives

 Increased understanding of our products and consumers within relevant markets

 Ensure the industry remains competitive nationally and internationally. Increased access and ease of access to export markets

 More explicit alignment of our industry product in tourism, brand, trade and other Tasmanian government and industry strategies.

> Clarify demand projections to inform product volume and market opportunities for existing and start-up distilleries

 Proactively manage the range of supply chain and resource challenges and opportunities

5. Remove regulatory red tape areas that impact profitability and growth.

Actions

Undertake customer and consumer sentiment research to set baseline data and provide insights and increased understanding of existing and potential domestic consumers.

Engage with government to seek information on export market research to ensure the industry can drive demand and support in leveraging the brand in priority domestic and international markets. Disseminate available information to the industry through website and other opportunities to support distillers to make informed business decisions. Identify barriers to growth and work with local, State and Commonwealth governments to ensure regulatory frameworks will support innovation and provide investment confidence across the industry. Advocate for a better trading environment for Tasmanian industry.

Support organisations to access the available tools that support the industry to explore, understand and engage with export opportunities.

Drive strategic and targeted promotional activities to grow markets in line with volumes, consulting and partnering with individual distillers to deliver tangible outcomes.

Engage with Tourism Tasmania, Brand Tasmania and other aligned industry groups to access and better understand the existing customer and consumer sentiment data and its relevance to the whisky and spirits industry.

Work with Tourism Tasmania, Wine Tasmania and other partners to enhance and grow our visitor economy and cellar door options and opportunities, including through a distillery touring map, website and statewide signage.

Work with Business Tasmania to provide support and advice to start-up and new operators.

Capture data about our industry to ensure an evidenced-based approach in all actions.

Undertake a project to better understand the scope and scale of supply chain challenges and opportunities and work with government and industry partners to deliver solutions.

Map across the three tiers of government the range of regulatory and red-tape barriers and advocate to streamline these.

"We specifically got this still and mashtun to do 'grain-on' distilling, specialising in American style grain whiskies"

JUSTIN TURNER FOUNDER, TURNER STILLHOUSE



Founded by former New York finance executive Justin Turner, Turner Stillhouse has rapidly achieved success since opening its doors three years ago.

Market expansion and growth

Turner Stillhouse

Born into a family of winemakers based in Northern California. Justin's connection to Tasmania began when he met his wife, who hails from the state. The couple relocated to Tasmania in 2018 and Justin Turner founded Turner Stillhouse shortly afterwards. Justin is supported by Tasmanian distiller Brett Coulson, who had previously worked for one of the State's biggest breweries. The distillery fuses Tasmanian craft spirits with American influence to create super-premium, small-batch spirits.

The distillery's flagship brand, Three Cuts Gin, has become one of Tasmania's highest-awarded gins over the past 12 months, most recently receiving Best International Contemporary Gin at the American Distilling Institute Awards (Double Gold) and Best Australian Gin at the Australian Gin Awards.

Located in the Tamar Valley next to the Tamar Ridge winery, the architect-designed distillery offers award-winning craft gins and has a range of whiskies (single malt and American style versions) scheduled for release in 2023.

Winner of the 2021 Tasmanian Tourism awards in the Distilleries. Breweries and Wineries category,

Turner Stillhouse has a strong focus on its visitor experience. It is uniquely co-located with a winery, offering tastings of both spirits and wines, including special occasion events and tasting flights. The new 3,000 litre copper whisky still imported from Oregon, USA is part of the visitor experience at the distillerv

In a crowded Tasmanian gin market, the distillery is focused on brand distinction. Named for the 'three cuts' of roses that are used in the distilling process, Three Cuts Gin is distilled from a premium grape base, pure Tasmanian water and botanicals including Tamar Valley roses.

THREE CUTS GIN Tourism Australia





Priority 3

Curating, protecting and enhancing our brand

The Tasmanian brand defines our industry: from the smallest, newest distillery to the proud founder history of our largest.

By embracing our unique Tasmanian qualities, we're able to imbue our products with the essence of our seasons, the character of our places and the passion of the makers.

Each distillery is an expression of the people that work tirelessly in the pursuit of something great, constantly inspired by their communities rich in other equally unique Tasmanian artisans.

This passion for the Tasmanian brand and the craft of distilling is one we love to share, you'll often find our distillers heads down, hands-on and doors open, welcoming locals and visitors alike, sharing their story of finding their place in the industry.

The industry will work together to ensure we can protect and further develop what makes "Tasmanian" our unique advantage to drive value and high-quality products.

Priority 3

Objectives

1. Curate, protect and grown our brand and our reputation

2. Align with our brand partners in the visitor economy, wine, food, arts and culture

3. Build on our proud first starter advantage, 30-year history and leadership economics

4. Ensure the industry has the knowledge and resources to enable environmental and social best practices across all operations.

Actions

Clearly articulate the Tasmanian whisky and spirit industry's unique positioning, including a formal definition of whisky and single malt whisky"

Protect the iconic Tasmanian whisky and spirits brand through trademark, legislative, regulatory and other measures such as establishing a Tasmanian Whisky Geographic Indicator or a Federal Authority similar to Wine Australia to protect our quality and brand locally and internationally.

Work in partnership with the government and aligned industries to better integrate our brand identity in trade and tourism government strategies and activities that connect to the Tasmanian brand.

Increase the industry's brand profile, specifically across visitor economy branding initiatives at a state-wide and regional level. This includes a distillery touring map and state-wide signage and link into key agritourism strategies and activities across government.

Develop an industry-wide "shared" brand story and strategy that includes master brand and industry consistent messaging. Develop industry-wide values and a code of ethics.

Build an understanding of the environmental effects of our industry to inform the development of a Whisky and Spirits Industry Sustainability Framework that guides the industry towards world-leading positive environmental and social impacts.

"Harnessing seasonal flavours makes for more interesting tasting gin."

HEAD DISTILLER, SOUTHERN WILD DISTILLERY

JUNIPER BERRIES

SOUTHERN WILD DISTILLERY S Group

The brand promotes the benefits of partnering with a range of small family-run Tasmanian

Curating, enhancing and protecting our brand

Southern Wild Distillery

Located in north-west Tasmania (Devonport), Southern Wild Distillery specialises in making award-winning 'Dasher+Fisher' gin.

The Southern Wild Distillery brand draws its inspiration and imagery from the unique towns, wild landscapes and clean environment of Tasmania.

agri-businesses, celebrating the people behind them and their pure produce.

Southern Wild Distillery is based on the world's best produce from small, local Tasmanian growers who are core to the making of its gin and gin-based cocktails.

The team of makers emphasise the benefits of a small, bespoke operation that can draw heavily from the seasons, regions and

use of local produce in making interesting tasting gin compared with global mass-produced goods. That's what makes it Tasmanian.

And like many in this industry, Southern Wild Distillery supports brand partners in the tourism and hospitality industries.

> DASHER FALLS, NORTH-WEST TASMANIA Jess Bonde



Delivering on our blueprint

The Tasmanian Whisky & Spirits Association will play a leadership role in enabling the initiatives within this blueprint. A strong industry body ensures a collective and influential voice to government and the ability to tackle wholeof-industry opportunities and challenges. The blueprint relies on initial government investment to ensure the industry has the foundations to continue to grow and contribute to the Tasmanian economy. This will be achieved through leveraging the association's relationships with its members, stakeholders and government partners.

<u>Timeline</u>

The strategy is intended to be
implemented over the next five
years and will be reviewed annually
to ensure it remains relevant and up
to date as the environment around
us may change.We will us
assess the
strategy:
1. Indu
2. Com

While implementation is over a five year period, the strategy recognises the long-term issue of climate change, decarbonisation, environmental stewardship, labour market changes and a range of long-term opportunities and challenges that will need to be considered.

Measures of success

We will use four simple measures to assess the ongoing success of our strategy:

- Industry value
- Contribution to key economic drivers such as regional jobs, income and increased tourism
- Proactive contribution to a range of sustainability measures that ensure the industry is not just the best in Tasmania but the best for Tasmania
- An influential industry, highly valued by the community and our government partners.

An annual implementation plan will be developed, setting out key actions to achieve this strategy.





OUR PARTNERS

A number of public and private partnerships will be developed to achieve our five-year strategy.

Government

Tasmanian and federal government Department of State Growth including Trade and International Relations Skills Tasmania Brand Tasmania Tourism Tasmania Events Tasmania WorkSafe Tasmania Department of Foreign Affairs and Trade

Private Sector Partners

Australian Distillers Association Spirits and Cocktails Australia Wine Tasmania Ferment Tasmania Tasmanian Cask Company

KILLARA DISTILLERY, WHISKY GLASS Moon Cheese Studio



Like a fine spirit, it takes time for the distiller's skills to mature. Like a fine spirit, it requires a blending of passion, skills and experience – and the guiding hand of others who have already trod what is a long and winding path to success.

Distilling is also about tradition. It's a craft steeped in history but also driven by innovation. And, as the Lark distilling dynasty proves, there is family. For, in family, you find all those essential ingredients: passion, skills, experience, tradition, history, the innovation that a new generation brings, and the sharing of knowledge.

Bill and Lyn Lark lit the fire under the Tasmanian distilling industry in 1992 – the first licence to be granted in the state in 153 years.

Today the tradition continues with daughter Kristy Booth-Lark and son Jack sharing the passion and building on the history.

LARK AT PONTVILLE ESTATE Kristy joined the family business working in the cellar door in Hobart and moved to production manager, then general manager in 2007 before the Lark business was sold in 2013.

That deep experience became the foundation for her own distillery, Killara, which she established in 2016 and is now bubbling away in its new premises in the historic town of Richmond.

She is also intent on a vision beyond her own business and beyond Tasmania. Kristy established the Australian Women in Distilling Association to further the education of women in the industry. Young brother Jack is equally steeped in the Lark tradition and was hands on helping with the bottling as Bill and Lyn built their business.

With that pedigree it's been a natural progression to the craft. He is the distiller at the Battery Point Distillery, which was established by the veteran Tasmanian tourism entrepreneur Lloyd Clarke.

Kristy and Jack: through tradition and innovation the Lark legacy is assured.

THE TASMANIAN WHISKY EXPERIENCE

rism Australia

(0)

COVER IMAGES

TASMANIAN COAST

OLD KEMPTON DISTILLERY Australian Tourism



TASMANIAN WHISKY & SPIRITS ASSOCIATION

HOW TO CONTACT US admin@twsa.net.au or call 0405 365 717

TASMANIAN