

2024-34

# WESTERN AUSTRALIAN CRAFT BEER STRATEGY OVERVIEW



A partnering initiative between:



Department of  
Primary Industries and  
Regional Development



# A WORD FROM THE PARTNERS



Department of  
Primary Industries and  
Regional Development



The Department of Primary Industries and Regional Development is pleased to partner with industry to facilitate the development of this inaugural Western Australian Craft Beer Strategy.

The department's purpose is to enable enduring prosperity for all Western Australians through our work with regions and primary industries. Food and beverage production including craft brewing contributes income and employment in many sectors including agriculture, manufacturing, hospitality, tourism, packaging and distribution.

With craft breweries located in Perth and every non-metropolitan region, economic impact is spread across the State supporting our primary industries and contributing to more prosperous regions.

A handwritten signature in black ink, appearing to read "Heather Brayford".

Heather Brayford  
Director General

The Independent Brewers Association is proud to be a signatory and partner to the Western Australian Craft Beer Strategy 2024-2034. We acknowledge and congratulate the Department of Primary Industries and Regional Development for its recognition and commitment to a sustainable brewing industry and for its leadership in delivering a quality outcome that involved wrangling 3 industry bodies and its government colleagues.

The development of the Strategy has been undertaken in a collegiate and thorough manner, is aligned to the IBA national 10-year road-map and as a result we are committed to its successful delivery.

A handwritten signature in black ink, appearing to read "Kylie Lethbridge".

Kylie Lethbridge  
Chief Executive Officer

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ACIL Allen, the Department of Primary Industries and Regional Development, IBA, WABA, and SWBA 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.

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Strategy document prepared by:

**ACIL ALLEN**



**SOUTH WEST  
BREWERS ALLIANCE**

The Western Australian Brewers Association proudly endorses the Western Australian Craft Beer Strategy 2024-2034, which encompasses our key pillars of support, advocacy, and promotion of WA breweries.

The Strategy adopts a forward-thinking approach that resonates deeply with our industry's needs, acknowledging the significance of a resilient supply chain ecosystem, committing to workforce empowerment and continuous learning, highlighting proactive regulatory measures, and embracing technological advancements and sustainability practices to shape the WA brewing landscape.

We support the proposed strategy, and with strong collaboration between Government and industry we believe it will propel the industry towards a future of prosperity, innovation, and sustainability.

A handwritten signature in black ink, appearing to read 'Michael Morgan'.

Michael Morgan  
Chairperson

The South West Brewers Alliance endorses the 'Western Australian Craft Beer Strategy' commissioned by the Department of Primary Industries and Regional Development, which projects the demands of the industry over the decade ahead. The Strategy incorporates and aligns with the four key areas of activity, which were identified as common challenges and priority areas of focus by the Alliance, at formation, being Education & Employment, Export & Logistics, Environment & Sustainability and Beer Tourism.

The fulfillment of the Strategy, mapped across 2024-2034, will we believe, contribute to the craft brewing industry's long-term sustainability, supporting industry members in navigating supply chain, workforce, technology and regulatory environments, to continue to contribute to a vital West Australian economy, generating employment and supporting local communities, whilst advancing awareness of Western Australia's premium produce globally.

A handwritten signature in black ink, appearing to read 'KSWarrick'.

Keith Warrick  
Chairperson



# PATHWAY TO 2034

**Western Australia is considered to be the birthplace of Australia's craft beer industry. Since the establishment of a handful of now iconic breweries in Perth in the 1980's and 1990's there are currently over 120 breweries spread across the metropolitan area and in all the State's regions, representing 20 per cent of the national industry.**

These breweries are supported by a range of locally based businesses that provide the ingredients and other inputs that make the industry truly Western Australian. These include those that produce barley, hops, and malt and the businesses that provide packaging, distribution, and retail services.

Western Australia's craft beer industry views itself as a dynamic and diverse sector within the broader beer market. Craft breweries in Western Australia are typically small, independent businesses that prioritise traditional brewing techniques, use high-quality and often local ingredients, and incorporate unique flavors and styles.

The emergence of craft beer in the State can be attributed to the growing consumer interest in unique and high-quality beverages, and the desire to support local businesses and their regional identity. The Western Australian craft beer industry values its close relationship with its customers catering for beer enthusiasts and those seeking the broader experience of enjoying craft beer.

To protect the uniqueness of the industry and to ensure its sustainable growth into the future, the inaugural Western Australian Craft Beer Strategy has been developed

as a partnering initiative between the Department of Primary Industries and Regional Development, Independent Brewers Association, Western Australian Brewers Association and the South West Brewers Alliance in consultation with the broader industry. This document provides a road-map for the industry to navigate over the following decade to achieve its vision for more beer, brewed in Western Australia using locally sourced products.

Implementation will be provided by mobilising industry and government resources for the establishment of a collaborative model to drive the five strategic pillars identified. The model aims to triple the sale of Western Australian craft beer in local, national and global markets, with Western Australian businesses supplying nearly all of the requirements of brewers.

This strategy will lay the groundwork for industry, government, and other stakeholders to shape the future of the craft beer industry. It aims to create career pathways, jobs, and business opportunities while catering to the lifestyle of Western Australians and the many visitors to our state in a sustainable and responsible manner.









## FROM THE MINISTER

The craft beer industry forms part of Western Australia's vibrant food and drink sector that builds on premium ingredients grown in the State's agricultural sector. The industry brings together Western Australian businesses from all parts of the supply chain to produce an authentic paddock to pint experience. But its reach extends beyond the supply chain to form part of the State's tourism experience and our premium food and beverage offering.

The inaugural Western Australian Craft Beer Strategy is an industry led initiative supported by the Department of Primary Industries and Regional Development. It aims to provide a strategic pathway for the industry and government to work collaboratively over the coming decade with a vision of encouraging more people to enjoy and experience the unique range of beers crafted in Western Australian breweries.

The Strategy contributes to the WA Government's broader economic development framework 'Diversify WA: Future State', which provides a blueprint for collaboration between government, industry and the community, and supports the WA Government's focus on creating secure, quality jobs, growing and diversifying the economy and attracting investment.

The Strategy provides a solid foundation and a set of achievable actions for this industry to move forward in a sustainable way.

A handwritten signature in white ink on a dark background.

Hon. Jackie Jarvis MLC  
Minister for Agriculture and Food;  
Forestry; Small Business



A bearded man with a full brown beard and mustache, wearing a dark green and black plaid shirt, is holding a glass of golden beer with a white head of foam. He is looking at the glass with a focused expression. The background is a dimly lit brewery with several large wooden barrels stacked on shelves.

# AN INDUSTRY-LED STRATEGY

**The Western Australian Craft Beer Strategy brings together all parts of the craft beer supply chain to drive the industry forward in a unified and sustainable way.**

The Strategy provides the pathway for brewers, ingredient suppliers, business service providers, retailers, wholesalers, and transport and logistic providers.

When developing the Strategy, feedback was sought on the issues facing the craft beer supply chain and the opportunities available for it to capture.

This feedback formed the basis for developing the vision, mission, and goals that will guide the industry's collaborative efforts over the next ten years.

The Strategy is designed to support every segment of the craft beer supply chain through a framework built around five strategic priorities and ten strategic initiatives, all aimed at achieving the strategy's vision, mission, and goals.

Throughout the strategy development process, industry was engaged to ensure it met their requirements and aspirations for the future.

The result is an industry-led strategy that provides a clear direction for the Western Australian craft beer industry today and for the decade ahead.



# FROM PADDOCK TO PINT

The Western Australian craft beer industry supports a local supply chain made up of producers of primary ingredients such as barley, malt and hops, and other inputs including CO2, transport, and professional services. Breweries use these inputs to craft an experience that is uniquely Western Australian.

The industry is made up of over 122 breweries, of which half are located in regional Western Australia, which together support thousands of direct jobs throughout the supply chain across regional Western Australia. The industry also indirectly supports jobs in the tourism, hospitality, and retail industries.

The “paddock to pint” narrative is a key reason why consumers are increasingly drawn to craft beer. This experience blends the elements of the craft beer supply chain with the enjoyment of spending time with family and friends.



**Input supplier**



**Wholesale/ distribution**



**Consumer**



**Brewery**

**Retailer**



**“There is an opportunity to link breweries with local Western Australian inputs and drive paddock to pint tourism while supporting the agriculture industry.”**

**“A more robust craft beer industry will have beneficial outcomes for the brewery supply chain including primary producers.”**



# CRAFT BEER INDUSTRY TODAY



The insights from consultation with the Western Australian craft beer supply chain identified themes that were common throughout Western Australia that describe the industry today.

## 1 Unique

The Western Australian craft beer industry has created its own unique structure and identity over many years, which differentiates it from other places around the world. It is predominantly made up of small to medium sized businesses, which source key inputs and supplies locally, and have a deep connection to the people and the region they are located in.

## 2 Emerging

The craft beer movement continues to grow in popularity, as consumers around the world seek out higher quality, distinctive and sustainably produced beer. The growth of the Western Australian craft beer industry reflects its capacity and drive to provide the experience sought by consumers.

## 3 Collaborative

The Western Australian craft beer industry is made up of breweries and the businesses in the supply chain that work well together, but recognises the need for an industry strategy centred on a single vision to drive long term sustainable growth.

# CRAFT BEER INDUSTRY OPPORTUNITIES

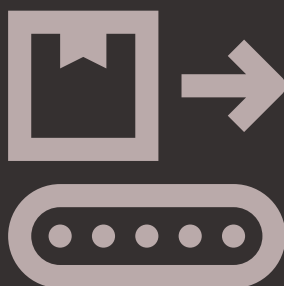
The Western Australian craft beer supply chain has identified opportunities that the industry is well positioned to target during the Strategy period. These priorities can be harnessed to help the industry achieve its vision.



Build the craft beer story into regional, State and National tourism experiences to help promote the industry as part of the State's wider food and beverage sector and its role in the tourism offering.



Explore new local, national and global markets for Western Australian craft beer to reach a wider consumer market.



Increase the share of the local supply chain to support local businesses and to ensure that craft beer made in the State remains uniquely Western Australian.



Enhance the sustainability credentials of the industry to ensure it maintains and grows its social and environmental licence to operate.



# STRATEGIC FRAMEWORK

The insights from consultation with the Western Australian craft beer supply chain identified themes that were common throughout the regions of Western Australia that describe the industry today.

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## Vision

More people, from more places, experience and enjoy Western Australian craft beer.

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## Mission

The commercial production of quality Western Australian beers, brewed sustainably using local inputs and suppliers.

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## Goals

1. Grow the volume and value of locally produced beer (aiming to triple the volume and/or value of craft beer production from a 2023 baseline).
2. Greater vertical integration of the Western Australian craft beer value chain (with the aim for the WA share of inputs across the supply chain in the production of craft beer to be determined through the completion of a data strategy).

# STRATEGIC PRIORITIES

Five enabling strategic priorities provide the pathway for the Western Australian craft beer industry to achieve its vision and goals. The strategic priorities and their underlying initiatives align with the priorities of the industry and the opportunities it has identified.

1

## Industry Foundations

To present a single voice for industry and to provide the leadership that will bring the Strategy to life and achieve its vision of more people enjoying Western Australian craft beer.

2

## Brand Awareness

To raise the profile of Western Australian craft beer and the local inputs that are used to make it by celebrating the industry's uniqueness and by building craft beer into the state's food and beverage offering and tourism experience.

3

## Market Access

To explore and capture more markets for Western Australian craft beer locally and in other parts of Australia and the globe.

4

## Supply Chain Management

To ensure the prosperity of the industry by building on best practice to enhance its sustainability credentials and increase the role that the local supply chain contributes.

5

## Regulation & Planning

To work collaboratively with government to enable growth, development and sustainability, and identify regulatory barriers.





# STRATEGIC PRIORITY 1

## Industry Foundations

Through the creation of a single voice for industry, this strategic priority will focus on providing the leadership that will bring the Strategy to life. This priority provides the foundation of the Western Australian Craft Beer Strategy by providing the strong governance to own the Strategy and drive the initiatives to deliver the achievement of its vision, mission and goals.

### Initiatives

1.1

Industry Leadership and Governance

The establishment of a single voice for the Western Australian craft beer industry to promote the industry and its long term growth and development. The model, led by industry, should complement the existing industry organisations including IBA, WABA, and SWBA.

1.2

Data Strategy

A data strategy to support the capture of critical industry data to support the growth and development of the industry. This should be facilitated through the new leadership, governance and advocacy model.

1.3

Building Capability & Skills

Build the capability of the industry, its business owners and its workforce through the development of training support packages and workforce training packages to grow the future workforce and attract new people to the industry.



# STRATEGIC PRIORITY 2

## Brand Awareness

This priority will focus on building the brand awareness of Western Australian craft beer to markets locally, nationally and globally by implementing a craft beer marketing plan and campaign, and by linking craft beer into the WA tourism brand.

### Initiatives

## 2.1

A Western Australian focused craft beer marketing plan and campaign

Develop a refreshed marketing plan and campaign to promote what makes the Western Australian craft beer industry unique. This could include cost effective promotion of the industry and advocacy with industry bodies that represent hospitality, tourism and retail sectors.

## 2.2

Linking craft beer into the State and National tourism brand

Incorporate craft beer into Australia's and Western Australia's offering as a destination for premium food and beverages.





# STRATEGIC PRIORITY 3

## Market Access

This priority is focused on improving market access of Western Australian craft beer through improved access to distribution channels to local, interstate and overseas markets.

### Initiatives

## 3.1

Build domestic distribution channels to improve market penetration in Western Australia

Expand the opportunity for brewers to engage with and access local distribution networks such as retail outlets, pubs, restaurants, festivals and stadia.

## 3.2

Selling Western Australian craft beer to the world

Strategic industry market and export readiness through improved access to distribution channels and export capability building initiatives.



# STRATEGIC PRIORITY 4

## Supply Chain Management

This priority aims to ensure the industry's prosperity by enhancing the market depth and efficiency of the craft beer supply chain through research and development funding.

### Initiatives

#### 4.1

R&D Program to target supply chain sustainability

Investigate opportunities for research and development to support the creation of a more environmentally responsible supply chain by reducing emissions, addressing waste, and creating markets for by-products. Support research and development initiatives that target gaps in the craft beer industry supply chain.

#### 4.2

A uniquely Western Australian supply chain

Industry led promotion of relevant programs and schemes of assistance to enhance the capability of the local supply chain and build business resilience.





# STRATEGIC PRIORITY 5

## Regulation and Planning

This priority is targeted at ensuring industry works effectively with government to enable the growth, development and sustainability of the craft beer industry, in line with government's broader economic development, diversification and decarbonisation agenda.

### Initiatives

**5.1**

Enhancing industry standards

Develop a set of industry-led quality standards that reflect the structure and operations of the craft beer industry.

**5.2**

Industry and government collaboration

Industry collaboration will guide strategy implementation and explore opportunities to effectively engage with the government on mechanisms that align with industry priorities.

**5.3**

Regulatory barriers

Identify land use planning, waste management, packaging, taxation, and health regulation impacting on growth and development issues in the craft beer industry.

# PLAN ON A PAGE

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## Goals

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## Strategic Priorities

## Initiatives

- |          |                         |     |                                                                                         |
|----------|-------------------------|-----|-----------------------------------------------------------------------------------------|
| <b>1</b> | Industry Foundations    | 1.1 | Industry leadership, advocacy and governance                                            |
|          |                         | 1.2 | Data Strategy                                                                           |
|          |                         | 1.3 | Building capability and skills                                                          |
| <b>2</b> | Brand Awareness         | 2.1 | A Western Australian focused craft beer marketing plan and campaign                     |
|          |                         | 2.2 | Linking craft beer to the State and National tourism brand                              |
| <b>3</b> | Market Access           | 3.1 | Build domestic distribution channels to improve market penetration in Western Australia |
|          |                         | 3.2 | Selling Western Australian craft beer to the World                                      |
| <b>4</b> | Supply Chain Management | 4.1 | Investigate opportunities for an R&D program to target supply chain sustainability      |
|          |                         | 4.2 | A uniquely Western Australian supply chain                                              |
| <b>5</b> | Regulation & Planning   | 5.1 | Enhancing industry standards                                                            |
|          |                         | 5.2 | Industry and government collaboration                                                   |
|          |                         | 5.3 | Regulatory barriers                                                                     |









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