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15
YEARS OF
CRAFTING
PRIDE

From the Soil of Bali to the World Table

Wine, Gastronomy, and the Future of Bali's Dining Identity

BRCA Talkshow at House of Sababay

Yoke Darmawan · Evy Gozali · Guillaume Quéron



The Conversation We Want to Own

Not a product pitch. A trade conversation about Bali's next destination value.

Bali is already a world tourism destination.

The next opportunity is to strengthen Bali as a world destination of taste.

**People do not only travel to see a place.
They travel to taste a place.**

For BRCA, this means wine is part of:

- restaurant identity and guest memory
- pairing, margin, and service confidence
- local craft that visitors can bring home as a story

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Gastronomy Is Destination Identity

Food, drink and wine now shape how travellers remember a place.

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27%

of respondents in key European markets said food & drink activities were a key reason to travel in 2024

25–35%

of traveller budgets may go to food and drink, depending on destination cost level

UN Tourism positions gastronomy and wine tourism as expressions of **culture, heritage, traditions, community and destination identity.**

For Bali, gastronomy connects farmers, chefs, restaurants, cafés, producers, rituals, hospitality and local craft.

Sources: CBI, The European Market Potential for Food Tourism; UN Tourism, Gastronomy and Wine Tourism.

Sababay as a Bali Gastronomy Asset

Not simply a local bottle — a crafted expression of place.

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Women-led

Leadership with resilience, detail and long-term care.

Artisan spirit

Small-batch thinking, craft, patience and courage.

From Bali's soil

Rooted in local grapes, farmers, climate and island identity.

Vin de garage philosophy

Independent, quality-led, outside the mainstream.

**The opportunity is not to imitate the world.
It is to elevate what only Bali can create.**

Yoke Darmawan

Corporate Affairs Director · Sababay Industry

Bali's Gastronomy Moment: Why Local Craft Matters

- Frame Bali as a world destination moving from scenery to taste
- Explain gastronomy as a destination identity, not a side element
- Position BRCA as frontliners of Bali's taste, service and memory
- Introduce Sababay as one expression of Bali's confident local craft

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Key line

“Bali becomes world-class when we elevate what is already ours — with quality, confidence and soul.”



Old World, New World, New Latitude



A smarter vocabulary for Sababay's place in the wine conversation.

Old World

Heritage, terroir, appellation, restraint, food culture.

What Sababay learns: discipline and respect for craft.

New World

Innovation, research, varietal clarity, market confidence.

What Sababay applies: openness and modern hospitality relevance.

New Latitude

Emerging regions beyond traditional wine zones: tropical, island, climate-challenged.

What Sababay contributes: Bali's own wine voice.

Sababay's position: Old World discipline + New World innovation + New Latitude courage.

The Global Wine Market Is Changing

2024 shows the shift: less volume, stronger value signals.

214.2 mhl

global wine consumption in 2024,
down 3.3% from 2023

225.8 mhl

global wine production in 2024, the
lowest in more than 60 years

€35.9 bn

global wine export value remained
strong, supported by higher average
prices

€3.60/L

average export price, holding at
record levels

Less volume. More value. More meaning.

Source: OIV, State of the World Vine and Wine Sector in 2024.

2025–2026: Recovery, But Not a Return to Normal

Climate pressure and demand shifts keep changing the rules.

2025 OIV estimate

232 mhl

global wine production midpoint estimate
+3% vs. 2024, but ~7% below 5-year
average

What this signals for 2026

- 01 Selective consumption: guests drink less but choose better
- 02 Food-friendly wine: pairing relevance beats prestige alone
- 03 Origin & story: memorable wines need a point of view
- 04 New latitude: climate and new regions reshape the wine map

2026 is not about more wine. It is about more relevant wine.

Source: OIV 2025 World Wine Production First Estimates.

Guillaume Quéron

Winemaker · Sababay Winery

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Topic

Vin de Garage in Bali: Craft, Courage & New Latitude Wine

- The wine map is changing: climate, markets and new regions are forcing adaptation
- Bali should not copy Europe; it should translate discipline through its own climate and cuisine
- Vin de garage: independent spirit, small-batch thinking, attention to detail and courage
- Tropical gastronomy needs freshness, acidity, texture, temperature and pairing flexibility

“We are not here to copy Europe in Bali. We are here to understand Bali and translate it into wine.”

Introducing our Chief Winemaker & Distiller

The Master Craftsman: Guillaume Queron



Guillaume Queron is the technical force who brings Sababay's grand vision to life. Born into a French winemaking lineage and a graduate of the **Institut Rural de Vayres**, Guillaume spent 24 years mastering the art of Bordeaux viticulture. As a protégé of **Jean-Luc Thunevin**—the iconoclast who started the "Garage Wine" movement—Guillaume learned how to transform unconventional ideas into world-class products. He operates with a deep reverence for nature and a commitment to the human element, ensuring that every drop produced is as ethical as it is exceptional.

Acting as the bridge between our Founder's vision and the dedicated farmers who form our backbone, Guillaume translates the potential of the Indonesian earth into award-winning reality. He expertly adapts noble French and Italian grape varieties to Bali's volcanic terroir, pioneering the "**New Latitude**" movement with technical precision. By merging his Bordeaux heritage with the tropical energy of the equator, Guillaume ensures that Sababay's innovative spirit is captured perfectly in every bottle of wine and crafted spirit we share with the world.

Evy Gozali

CEO · Sababay Winery

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Building a Women-Led Wine House from Bali

- Belief** Indonesian grapes can create higher value.
- Leadership** Women-led: detail, warmth, discipline and resilience.
- Trade confidence** Local must earn its place through quality, consistency and service.
- Collaboration** Restaurants and cafés shape how Bali's gastronomy is perceived.

“We are not building Sababay only as a wine brand. We are building a Bali wine house — rooted in our soil, led by women, shaped by craft.”

What This Means for BRCA

From wine list to destination story.

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01

Curate shorter, smarter wine lists that fit climate, cuisine and guest occasions

02

Build staff confidence around story, pairing and service temperature

03

Use Bali-made craft as a point of difference, not a compromise

04

Collaborate with producers, chefs and winemakers to build destination taste

**The wine list should not only sell bottles.
It should tell the story of the place.**

Sources & Reference Points

For data-backed remarks during the BRCA talkshow.

OIV, State of the World Vine and Wine Sector in 2024

Global consumption 214.2 mhl; production 225.8 mhl; export value €35.9bn; average export price €3.60/L.

OIV, 2025 World Wine Production First Estimates

2025 production midpoint estimate 232 mhl; +3% vs 2024, ~7% below 5-year average.

UN Tourism, Gastronomy and Wine Tourism

Food-making and wine-making as part of destination history, culture and identity.

CBI, The European Market Potential for Food Tourism

Food and drink activities as key travel motivation in European outbound markets.

Prepared for Sababay Winery / House of Sababay · BRCA Talkshow