

**Wine**  
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insights for  
**Australian**  
**Wine**

**Margaret River**  
**Export Report:**  
**Packaged wine**  
MAT June 2019

## Important reading

- This report provides an overview of packaged wine exports where there is a GI claim on the label. It does not provide a full picture of all wine that has been produced and exported from a specific region. Packaged wine includes glass bottle, soft pack and alternative packaging.
- This report is for packaged wine only and wine exported in bulk containers is not included.
- This report is updated quarterly.
- All data, unless specifically stated, is for the moving annual total (MAT), in other words, for the 12 months to the month ending that stated on the front cover. All growth rates are for the annual change to the same period.
- All data presented is for wines where the report's region is the primary GI named on the label. For example, one bottle of Yarra Valley/King Valley blend will contribute 750ml towards the Yarra Valley report but will be excluded from the King Valley report.
- When the wine is not regionally identified, data is not included in this report. For example, if the same Yarra Valley/King Valley wine has no GI claim on the bottle it will be included in a report 'no label claim'.

**Disclaimer:** While Wine Australia makes every effort to ensure the accuracy and currency of information within this report, we accept no responsibility for information, which may later prove to be misrepresented or inaccurate, or reliance placed on that information by readers.

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# Contents

Packaged exports over time – volume, value & avg. value	p4
Packaged exports by destination over time – volume and value	p5
Packaged exports by price point and destination – volume	p6
Packaged exports by colour/wine style – volume	p7
Packaged exports by colour/wine style – value	p8
Packaged exports by colour/wine style – average value	p9
Packaged exports by top 15 destinations – volume	p10
Packaged exports by top 15 destinations – value	p11
Packaged exports by top 15 destinations – average value	p12
Total packaged exports by price point – volume	p13
Red packaged exports by price point – volume	p14
White packaged exports by price point – volume	p15
Packaged wine exports to no. 1 destination	p16
Packaged wine exports to no. 2 destination	p17
Packaged wine exports to no. 3 destination	p18
Packaged wine exports to no. 4 destination	p19
Packaged wine exports to no. 5 destination	p20

# GI claims over time

	Volume		Value		Average Value	
	'000 litres	Change	'000 AUD	Change	AUD per litre	Change
MAT June 2011	2,479	39%	\$23,050	18%	\$9.30	-15%
MAT June 2012	2,426	-2%	\$23,843	3%	\$9.83	6%
MAT June 2013	2,665	10%	\$27,736	16%	\$10.41	6%
MAT June 2014	2,228	-16%	\$23,632	-15%	\$10.61	2%
MAT June 2015	2,017	-9%	\$22,920	-3%	\$11.36	7%
MAT June 2016	2,136	6%	\$25,418	11%	\$11.90	5%
MAT June 2017	2,507	17%	\$30,206	19%	\$12.05	1%
MAT June 2018	2,644	5%	\$31,086	3%	\$11.76	-2%
MAT June 2019	2,541	-4%	\$32,026	3%	\$12.60	7%

# GI claims by country

	MAT June									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Volume ('000 litres)										
Canada	155	191	205	174	179	125	157	154	154	128
China, Pr	214	455	337	647	390	391	335	598	648	709
France	56	50	90	98	66	38	39	38	41	30
Hong Kong	160	240	379	271	180	144	119	111	116	95
Indonesia	10	25	37	29	16	26	18	34	32	35
Japan	62	50	71	55	43	43	39	29	41	36
Malaysia	19	33	45	45	52	45	29	32	38	39
New Zealand	82	38	47	55	85	70	59	76	104	72
Ship	17	44	63	67	32	29	49	73	47	37
Singapore	195	179	249	183	216	202	252	225	218	242
Thailand	17	30	47	36	43	30	61	90	85	85
United Arab Emirates	30	39	42	80	72	63	50	50	58	38
United Kingdom	434	706	417	355	382	373	414	484	392	314
United States Of America	139	177	172	362	309	284	375	336	445	400
Vietnam	15	15	13	12	9	6	3	8	10	102
Value ('000 AUD)										
Canada	1,770	1,940	2,219	1,674	1,851	1,439	1,946	1,962	1,963	1,669
China, Pr	1,893	3,622	3,563	6,525	4,273	4,284	4,100	6,694	7,051	8,711
France	711	625	907	1,055	695	446	404	452	407	358
Hong Kong	1,900	2,511	2,578	2,552	1,839	1,689	1,573	1,662	1,644	1,493
Indonesia	166	393	515	465	253	351	208	523	422	541
Japan	1,053	728	1,069	1,233	642	589	581	440	646	537
Malaysia	251	412	525	557	539	491	356	389	493	475
New Zealand	709	392	467	519	734	607	576	757	889	733
Ship	309	606	794	780	375	267	483	709	543	415
Singapore	2,620	2,244	3,183	2,396	2,832	2,625	3,400	3,216	3,233	3,708
Thailand	227	272	395	342	325	300	585	782	880	910
United Arab Emirates	405	580	549	1,225	971	624	763	929	842	567
United Kingdom	3,819	5,163	3,330	3,061	3,377	4,005	4,315	5,145	4,217	3,409
United States Of America	1,403	1,449	1,502	3,144	3,145	3,404	4,435	4,077	5,299	5,010
Vietnam	156	199	176	154	111	112	43	139	155	1,111

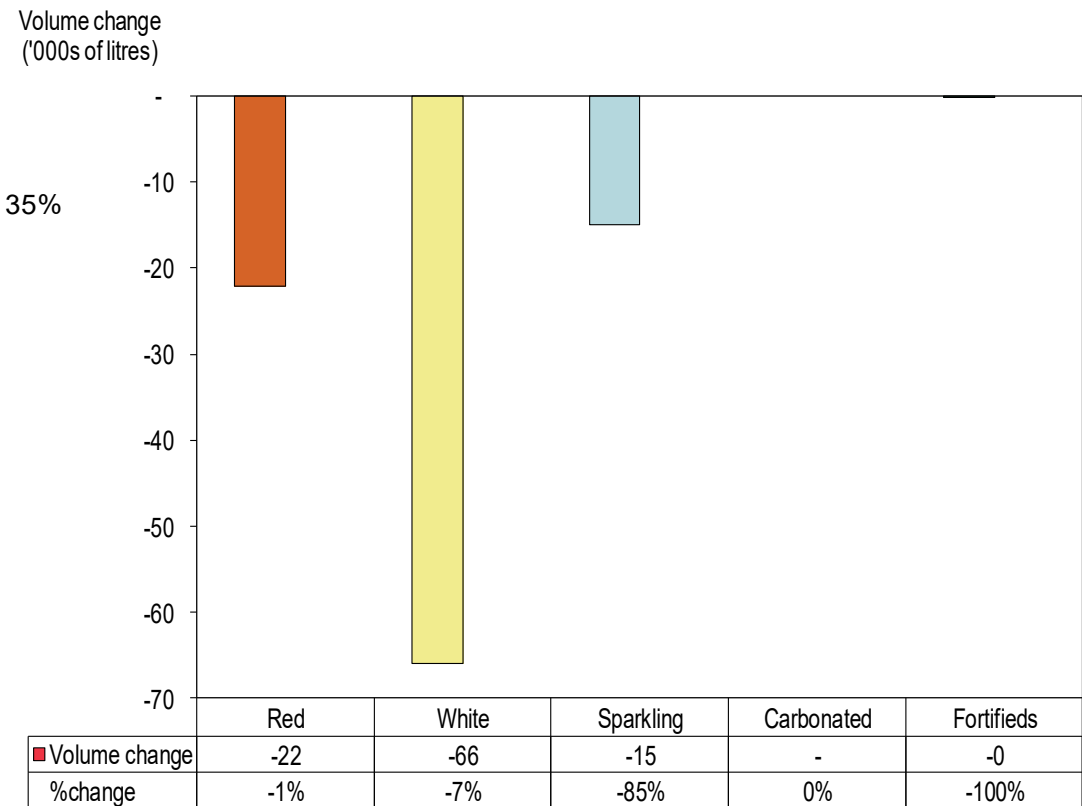
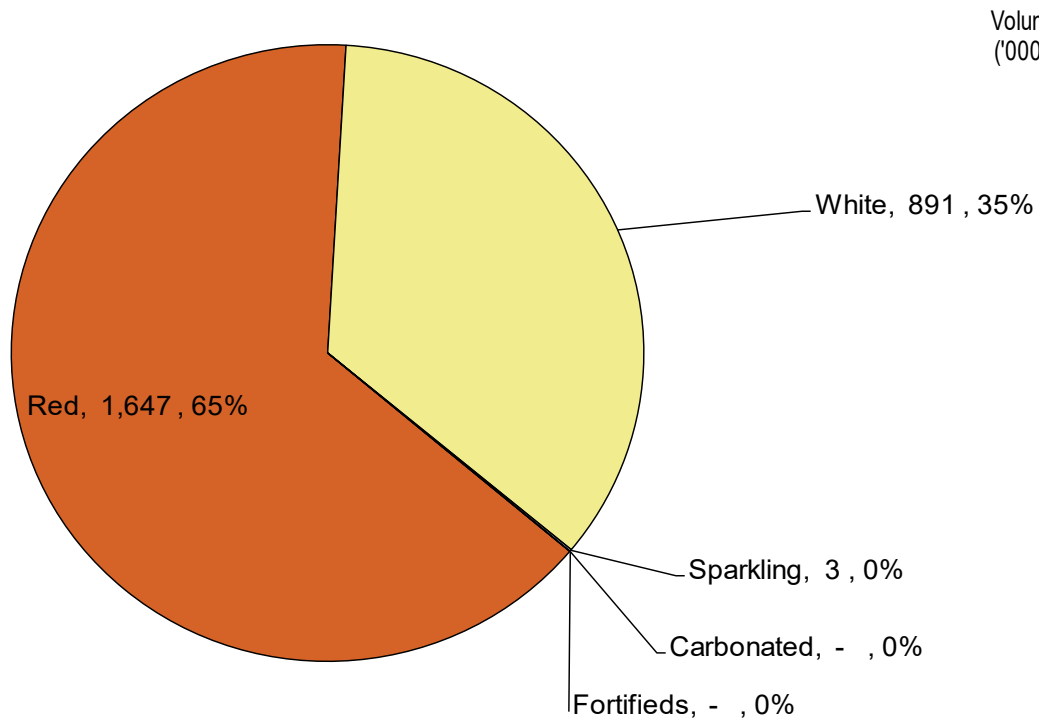
# Packaged exports by price point and destination

	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10 to \$19.99		Above \$20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
China, Pr	4	82443%	97	-25%	109	12%	82	-16%	332	20%	85	75%	709	9%
United States Of America	1	na	9	463%	28	-36%	177	19%	146	-33%	39	25%	400	-10%
United Kingdom	0	na	7	-66%	72	-41%	165	46%	48	-56%	22	-19%	314	-20%
Singapore	0	na	0	-97%	4	-31%	22	-4%	174	8%	41	52%	242	11%
Canada	0	na	-	na	4	-66%	7	-14%	110	-12%	8	-26%	128	-16%
Vietnam	-	na	-	na	23	4232%	39	1226%	39	681%	1	-33%	102	888%
Hong Kong	-	-100%	2	156%	14	-10%	18	-21%	46	-25%	15	-3%	95	-19%
Thailand	-	na	1	na	2	-87%	48	4%	32	40%	3	-12%	85	1%
New Zealand	-	na	-	-100%	32	-52%	13	-15%	25	80%	3	-30%	72	-30%
Malaysia	-	na	3	-21%	8	179%	10	7%	13	-18%	4	-12%	39	5%
United Arab Emirates	-	na	-	na	-	-100%	3	-63%	33	-28%	2	-35%	38	-34%
Ship	-	na	-	na	4	-54%	7	-24%	25	-12%	1	-22%	37	-22%
Japan	-	na	5	na	-	-100%	7	33%	17	-40%	7	8%	36	-10%
Indonesia	-	na	-	-100%	-	na	7	-37%	19	81%	8	49%	35	9%
France	-	na	-	na	-	na	16	-56%	13	222%	1	82%	30	-26%
Other	0.5	na	-	-100%	21	-68%	53	-16%	80	22%	23	26%	178	-17%
<b>Total</b>	<b>5.9</b>	<b>1806%</b>	<b>124</b>	<b>-26%</b>	<b>321</b>	<b>-29%</b>	<b>675</b>	<b>9%</b>	<b>1,151</b>	<b>-4%</b>	<b>265</b>	<b>26%</b>	<b>2,541</b>	<b>-4%</b>

# Packaged exports by colour/wine style

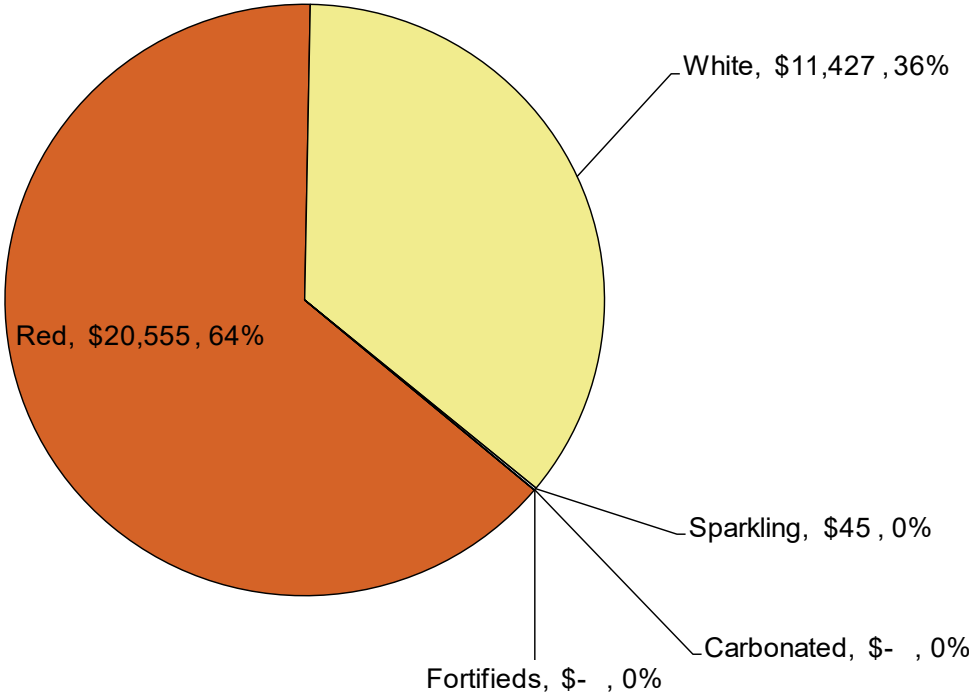
Volume ('000 litres)

Change in volume

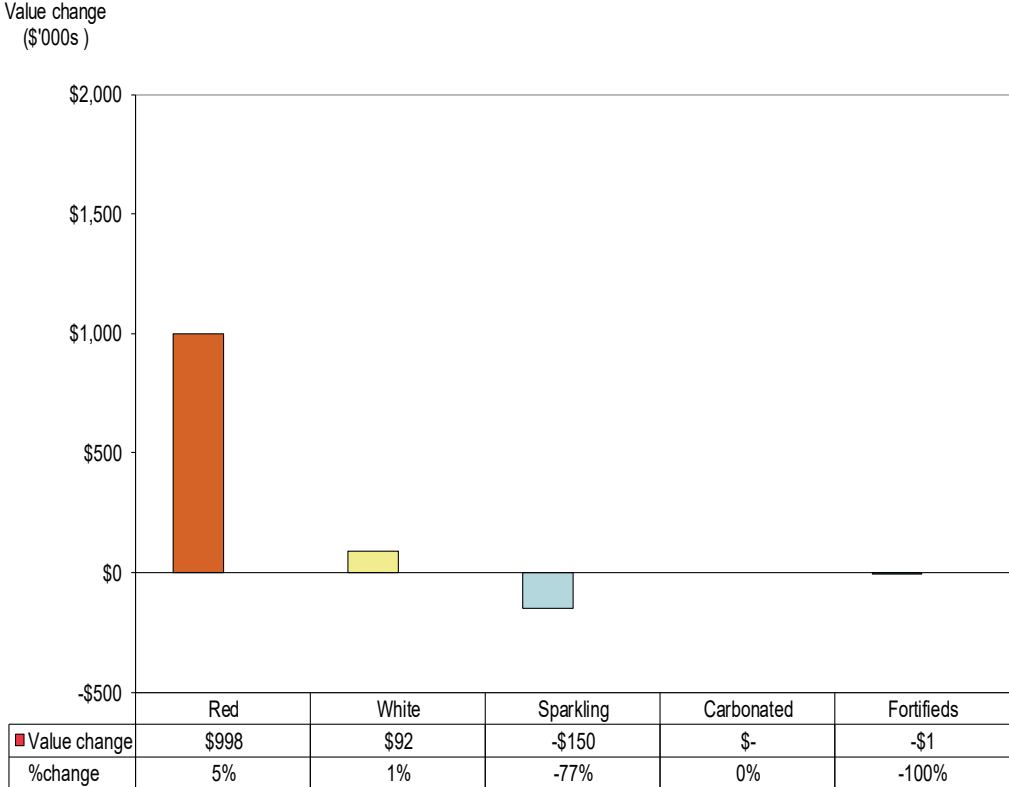


# Packaged exports by colour/wine style

Value ('000 AUD)



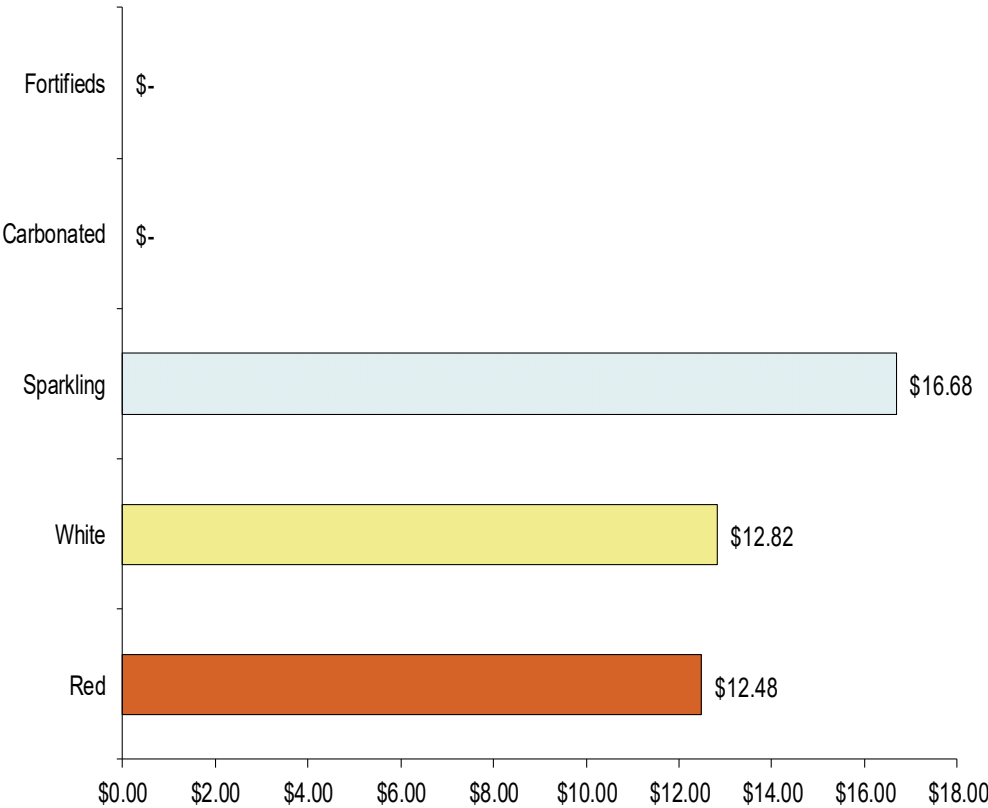
Change in value



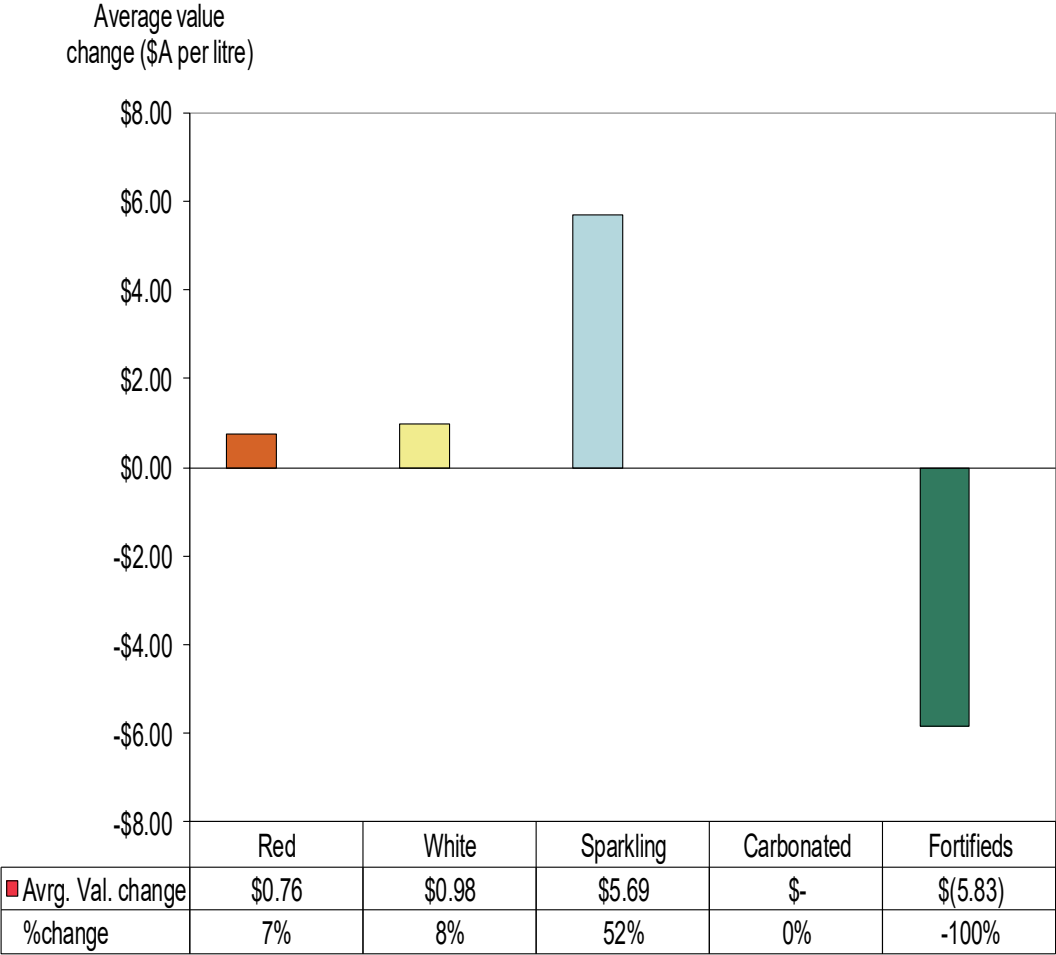


# Packaged exports by colour/wine style

Average value (AUD per litre)



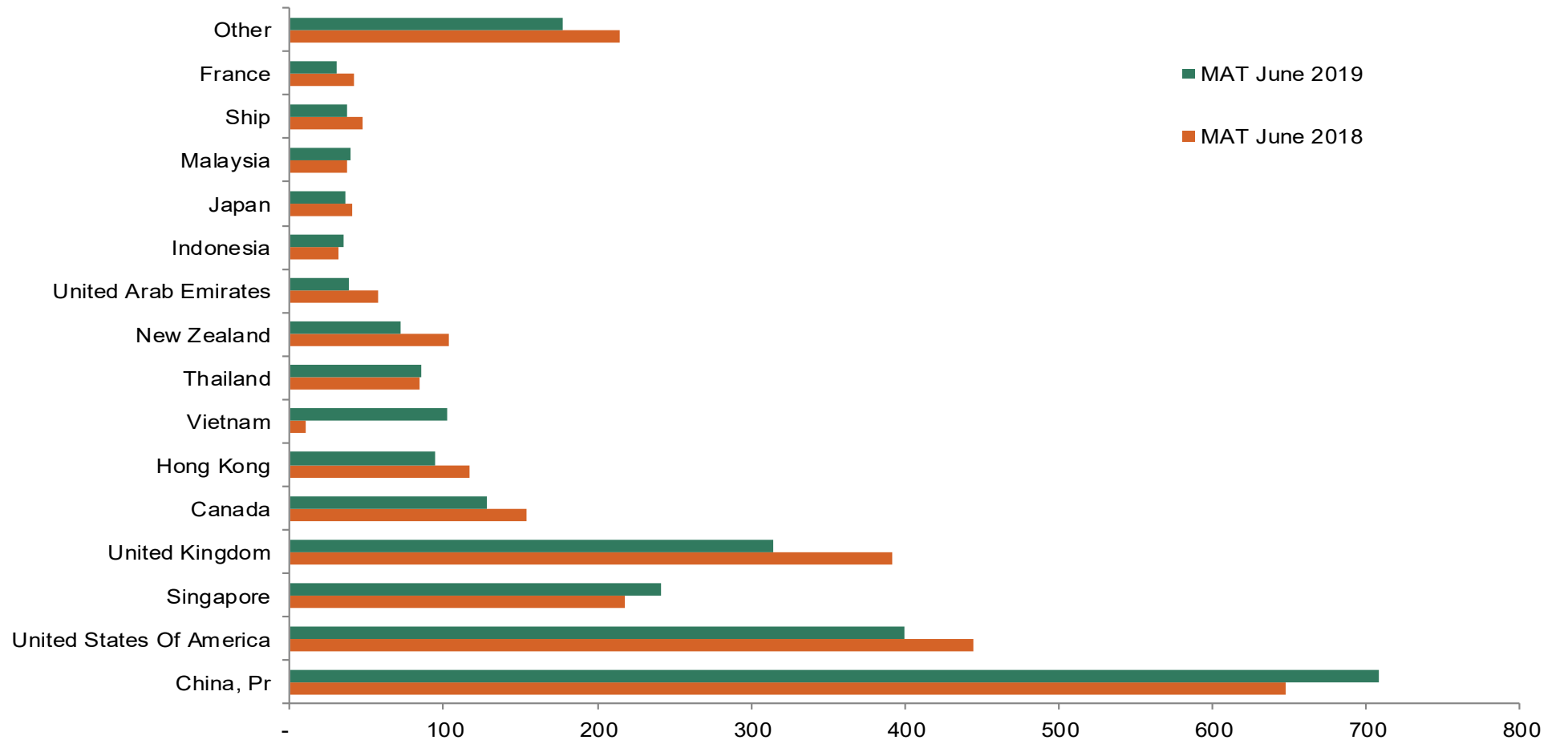
Change in average value



	Red	White	Sparkling	Carbonated	Fortifieds
■ Avrg. Val. change	\$0.76	\$0.98	\$5.69	\$-	\$(5.83)
%change	7%	8%	52%	0%	-100%

# Packaged exports by top 15 destinations

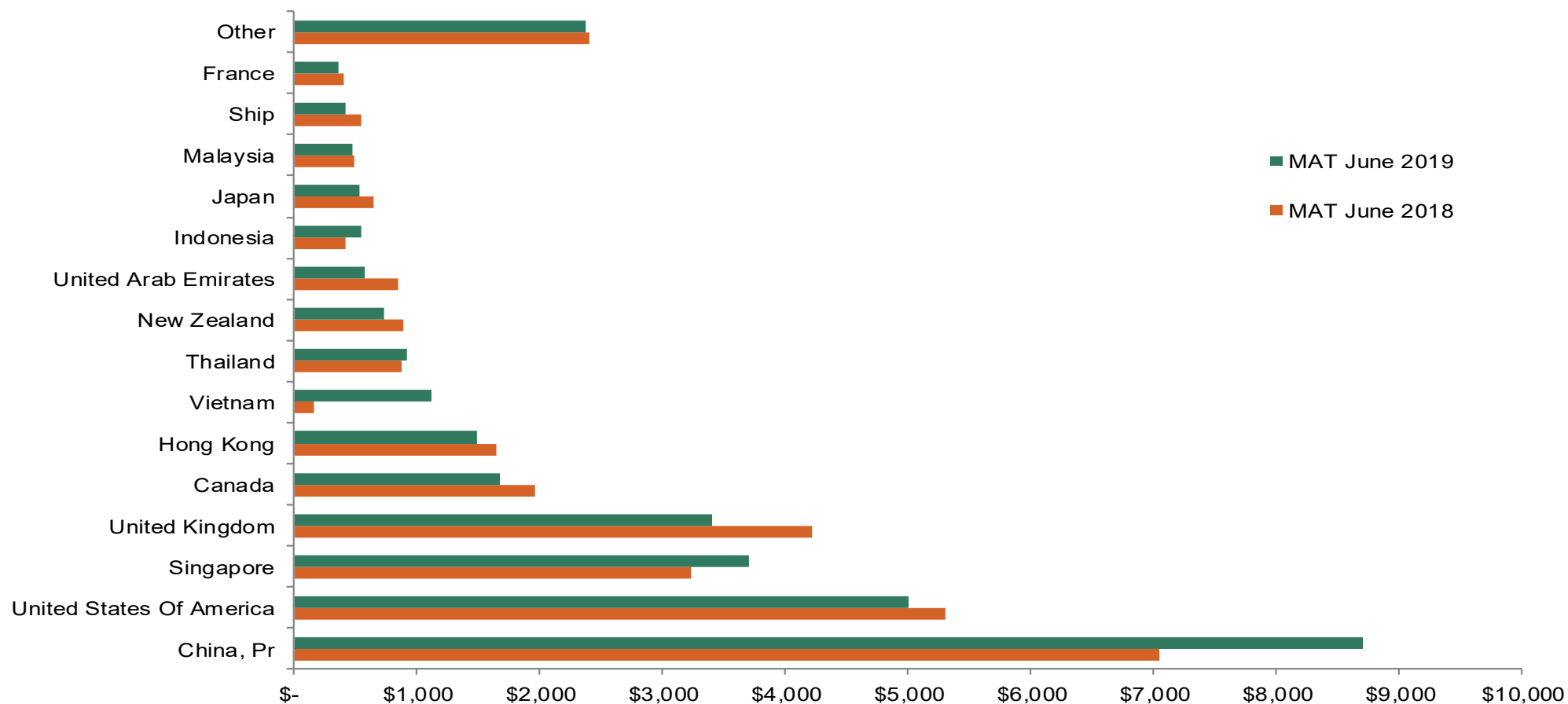
Volume ('000 litres)



	China, Pr	United States Of America	Singapore	United Kingdom	Canada	Hong Kong	Vietnam	Thailand	New Zealand	United Arab Emirates	Indonesia	Japan	Malaysia	Ship	France	Other
■ MAT June 2019	709	400	242	314	128	95	102	85	72	38	35	36	39	37	30	178
■ MAT June 2018	648	445	218	392	154	116	10	85	104	58	32	41	38	47	41	215

# Packaged exports by top 15 destinations

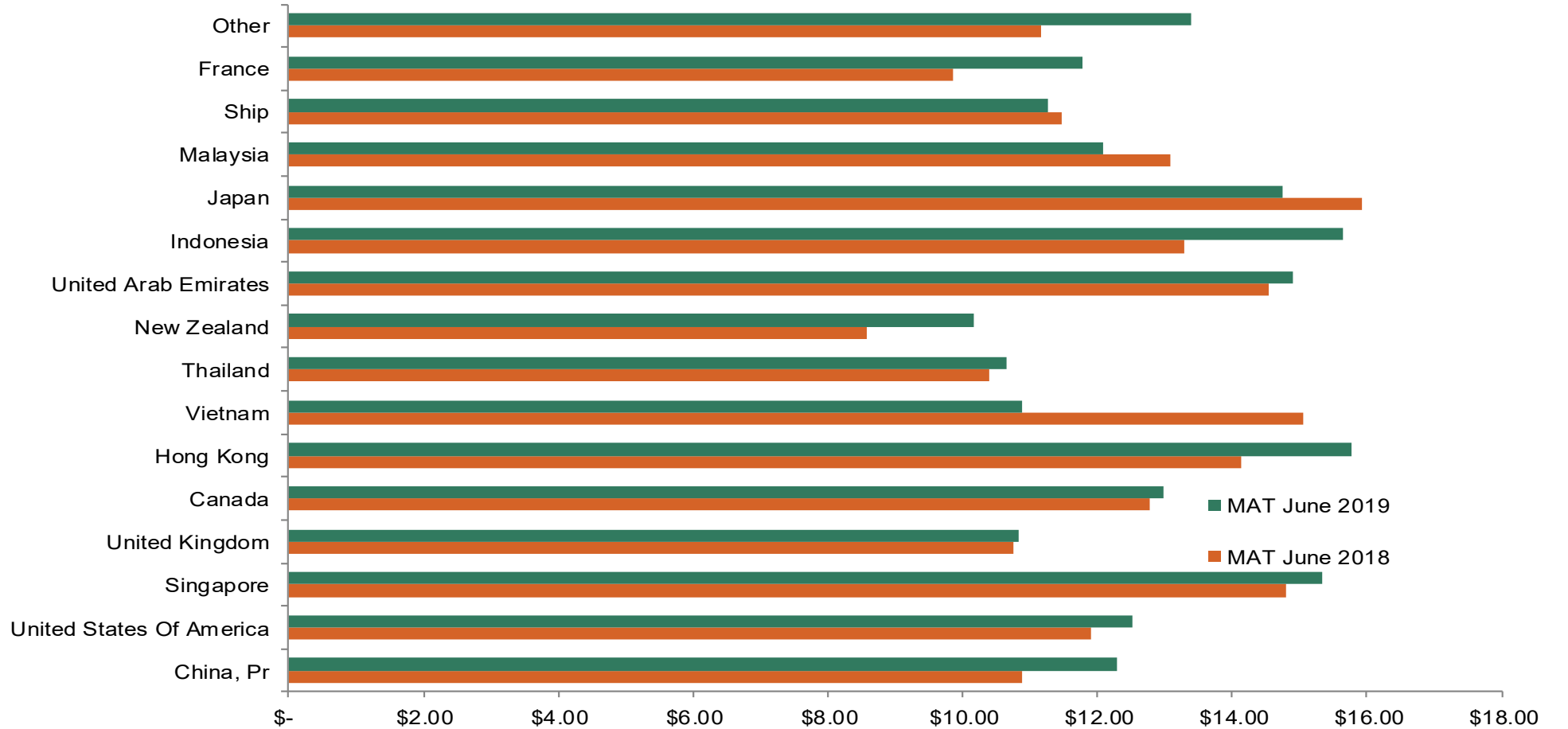
Value ('000 AUD)



	China, Pr	United States Of America	Singapore	United Kingdom	Canada	Hong Kong	Vietnam	Thailand	New Zealand	United Arab Emirates	Indonesia	Japan	Malaysia	Ship	France	Other
■ MAT June 2019	\$8,711	\$5,010	\$3,708	\$3,409	\$1,669	\$1,493	\$1,111	\$910	\$733	\$567	\$541	\$536.9	\$475.3	\$415	\$358	\$2,378
■ MAT June 2018	\$7,051	\$5,299	\$3,233	\$4,217	\$1,963	\$1,644	\$155	\$880	\$889	\$842	\$422	\$646.0	\$492.8	\$543	\$407	\$2,401

# Packaged exports by top 15 destinations

Average Value (AUD per litre)

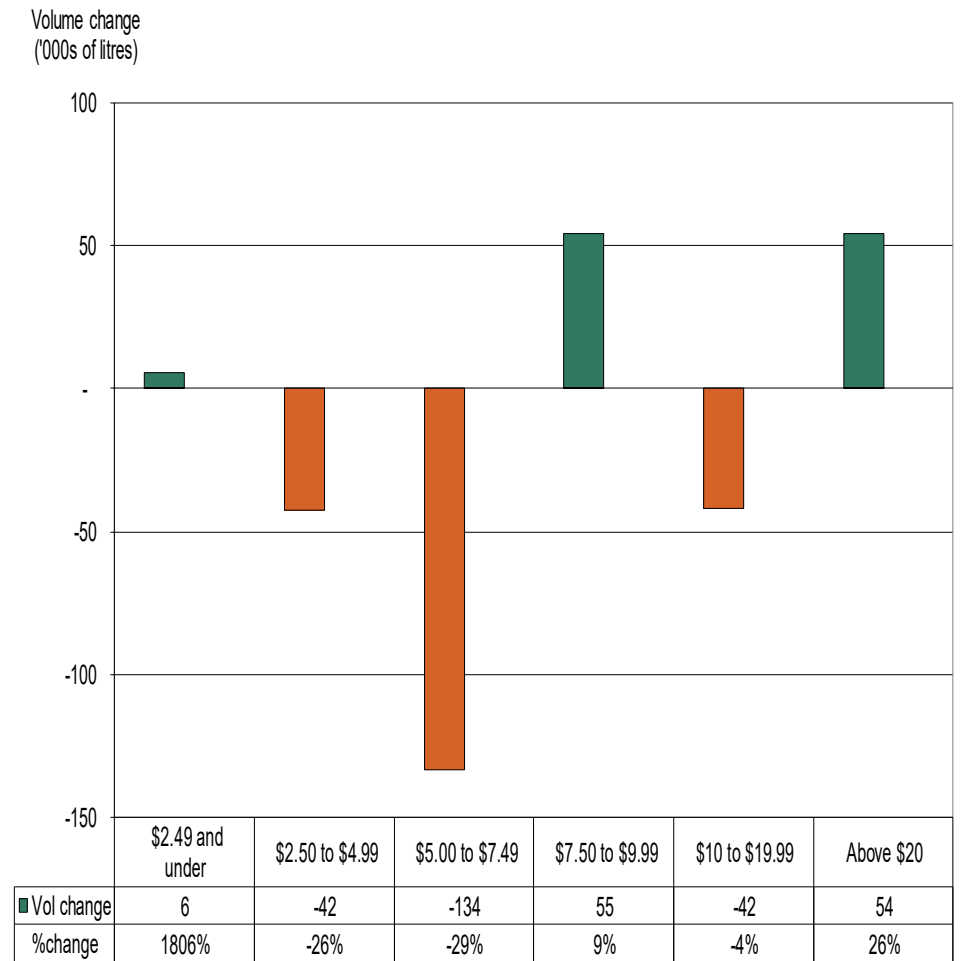
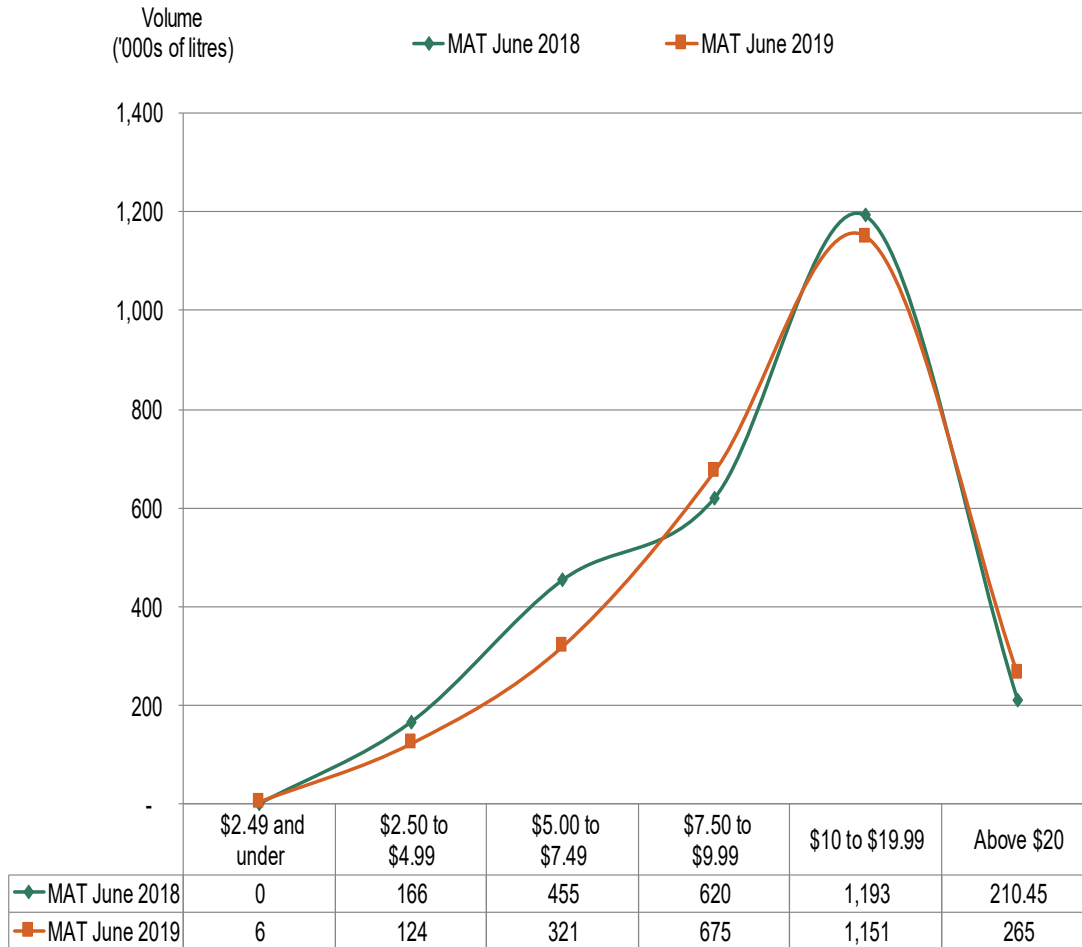


	China, Pr	United States Of America	Singapore	United Kingdom	Canada	Hong Kong	Vietnam	Thailand	New Zealand	United Arab Emirates	Indonesia	Japan	Malaysia	Ship	France	Other
■ MAT June 2019	\$12.29	\$12.53	\$15.33	\$10.84	\$12.99	\$15.76	\$10.88	\$10.65	\$10.16	\$14.91	\$15.65	\$14.75	\$12.07	\$11.27	\$11.79	\$13.38
■ MAT June 2018	\$10.87	\$11.90	\$14.81	\$10.76	\$12.78	\$14.12	\$15.05	\$10.40	\$8.58	\$14.53	\$13.29	\$15.91	\$13.08	\$11.46	\$9.85	\$11.16

# Packaged exports by price point

Volume ('000 litres)

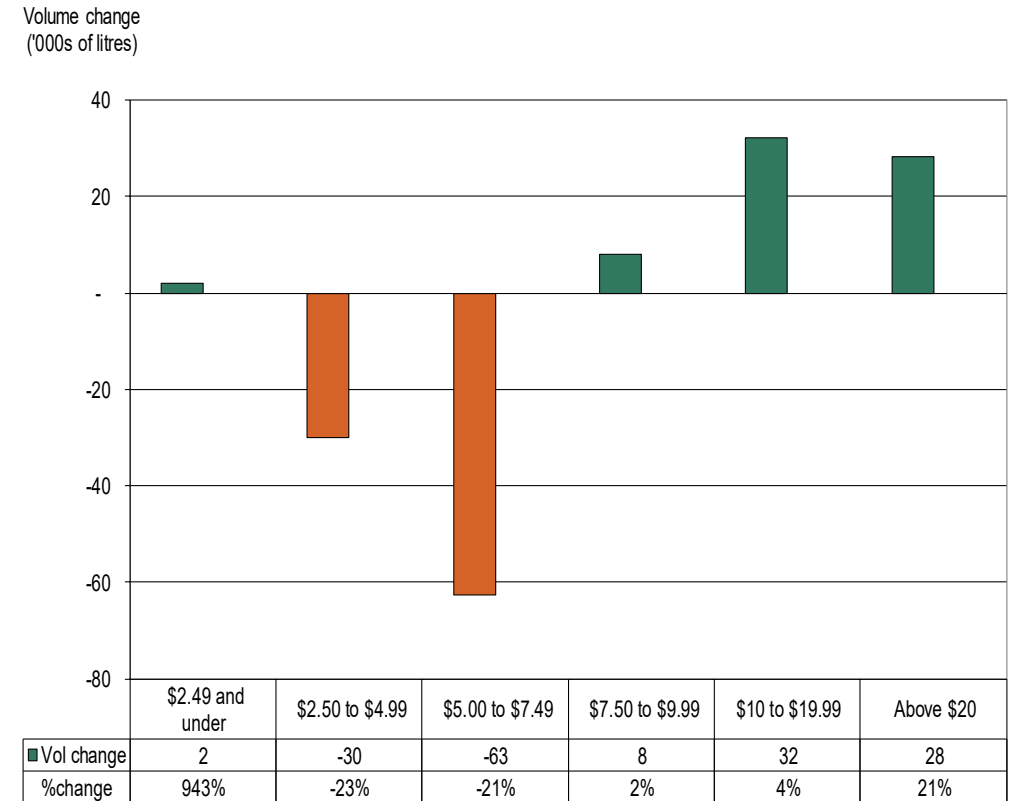
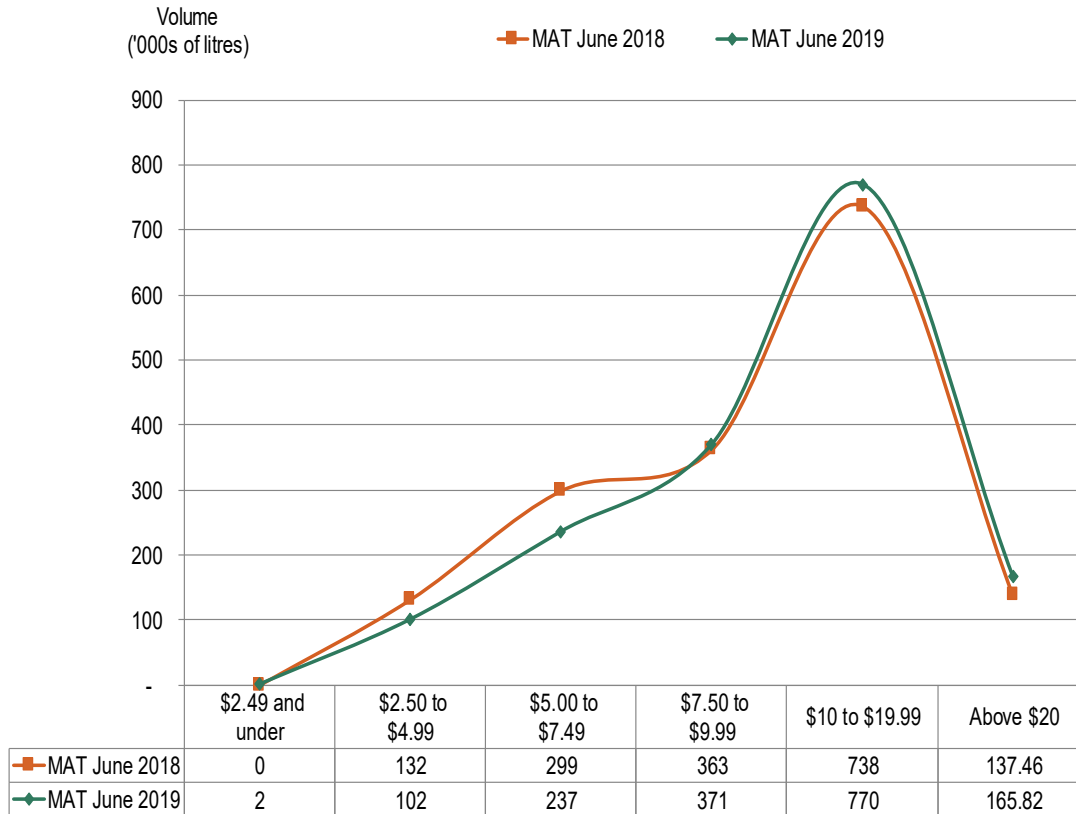
Change in volume



# Packaged red wine exports by price point

Volume ('000 litres)

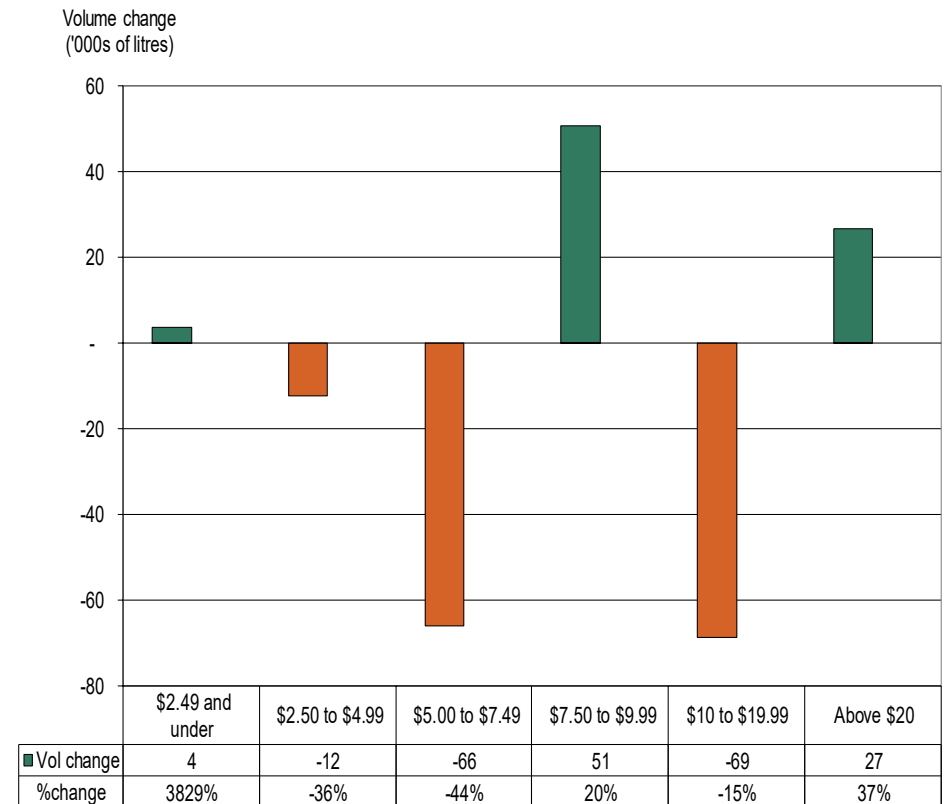
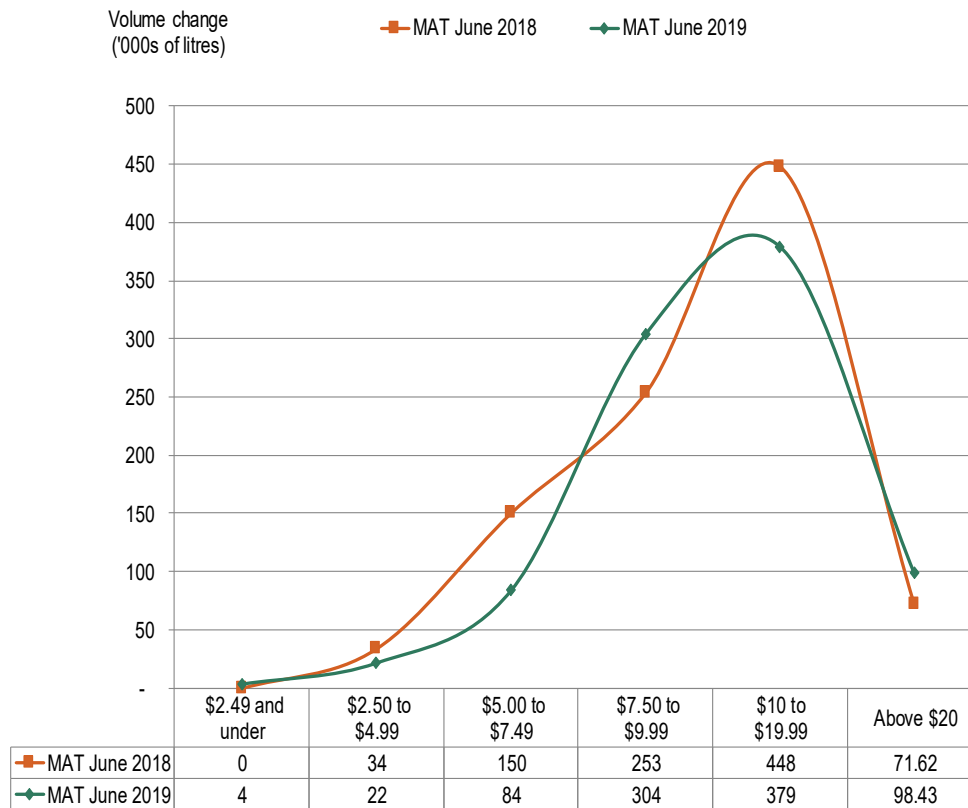
Change in volume



# Packaged white wine exports by price point

Volume ('000 litres)

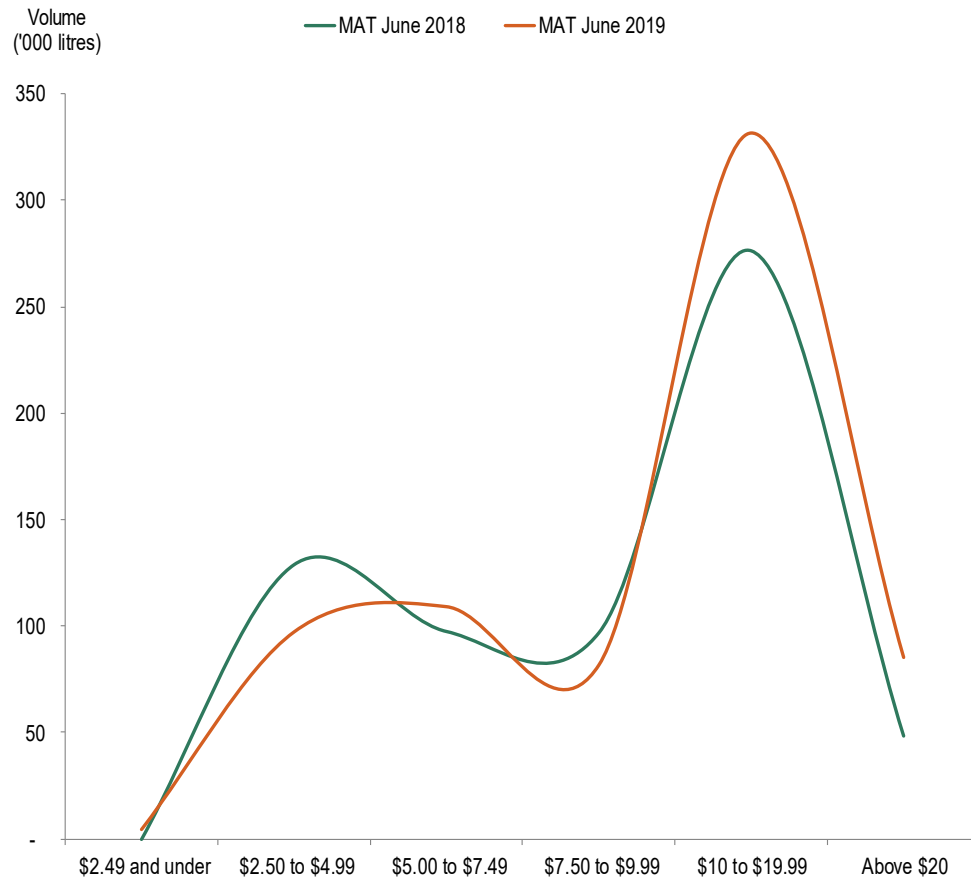
Change in volume



# Packaged wine exports to China, Pr

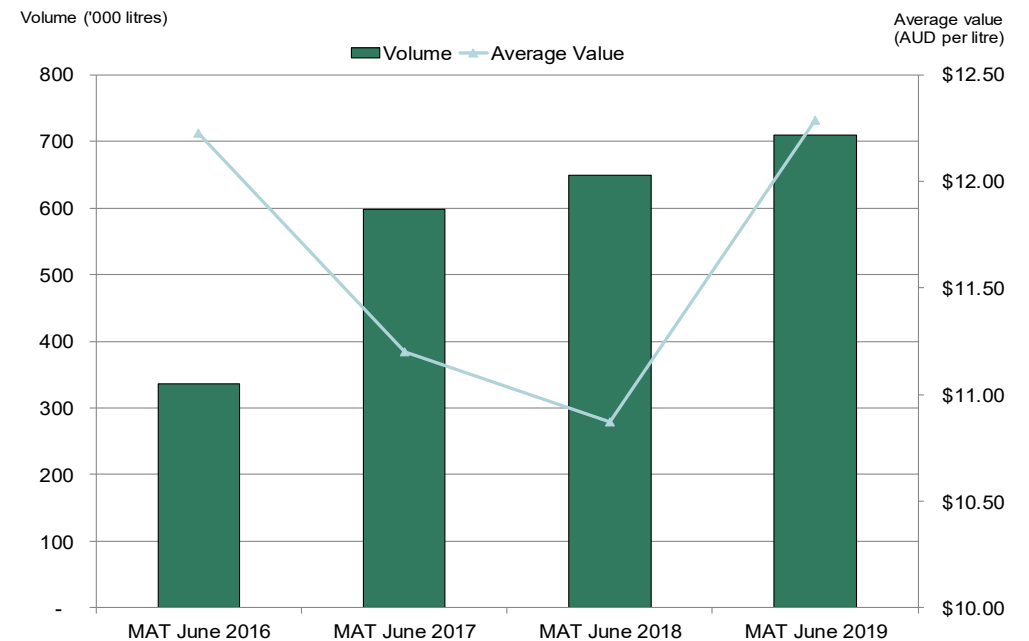
## Overview

### Total wine by price point



		MAT June 2018	MAT June 2019	Change
Red wine	Volume (litres)	548,759	629,202	15%
	Value (AUD)	\$6,020,840	\$7,570,145	26%
	Average value	\$10.97	\$12.03	10%
White wine	Volume (litres)	90,638	79,051	-13%
	Value (AUD)	\$939,694	\$1,123,133	20%
	Average value	\$10.37	\$14.21	37%
Total wine	Volume (litres)	648,482	708,910	9%
	Value (AUD)	\$7,050,887	\$8,711,492	24%
	Average value	\$10.87	\$12.29	13%

### Total volume and average value



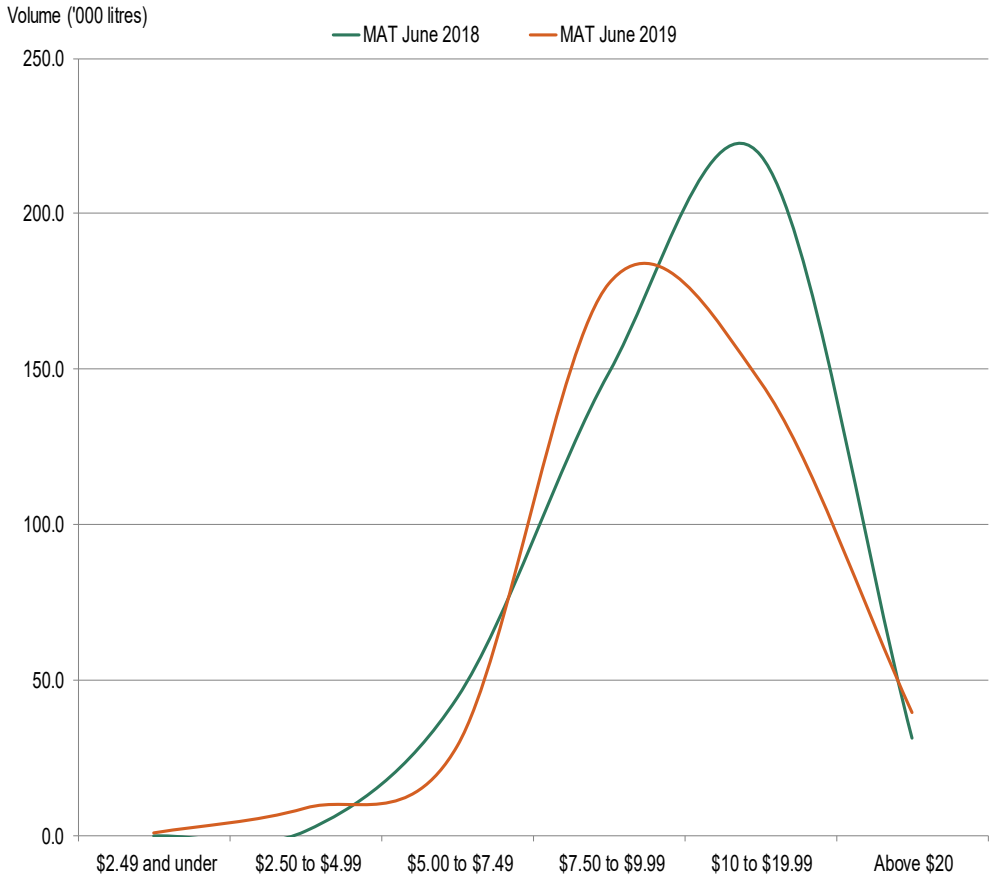


# Packaged wine exports to United States Of America

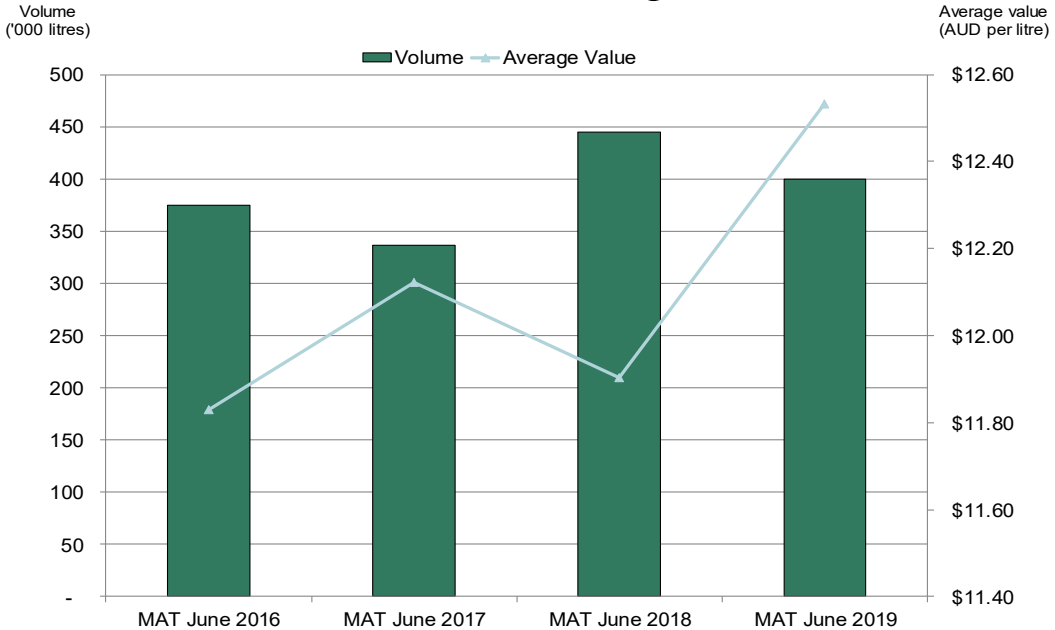
## Overview

		MAT June 2018	MAT June 2019	Change
Red wine	Volume (litres)	163,733	132,296	-19%
	Value (AUD)	\$2,106,365	\$1,896,452	-10%
	Average value	\$12.86	\$14.33	11%
White wine	Volume (litres)	279,788	267,471	-4%
	Value (AUD)	\$3,162,335	\$3,113,139	-2%
	Average value	\$11.30	\$11.64	3%
Total wine	Volume (litres)	445,230	399,767	-10%
	Value (AUD)	\$5,299,202	\$5,009,591	-5%
	Average value	\$11.90	\$12.53	5%

### Total wine by price point



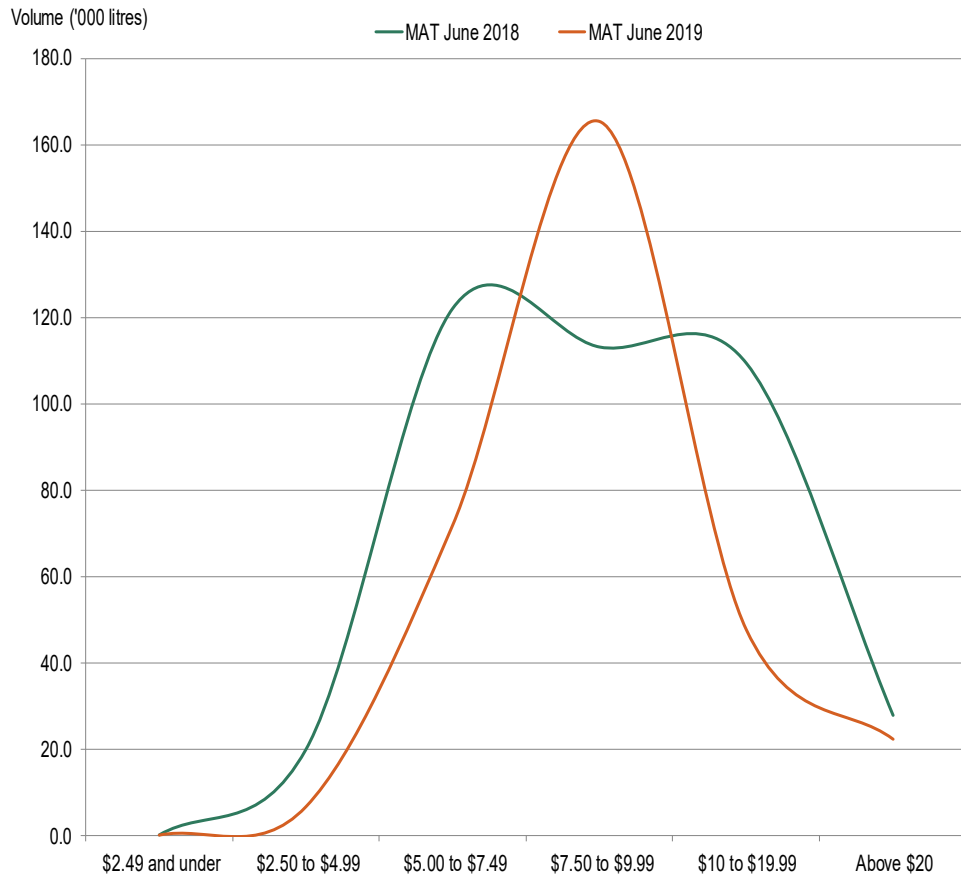
### Total volume and average value



# Packaged wine exports to United Kingdom

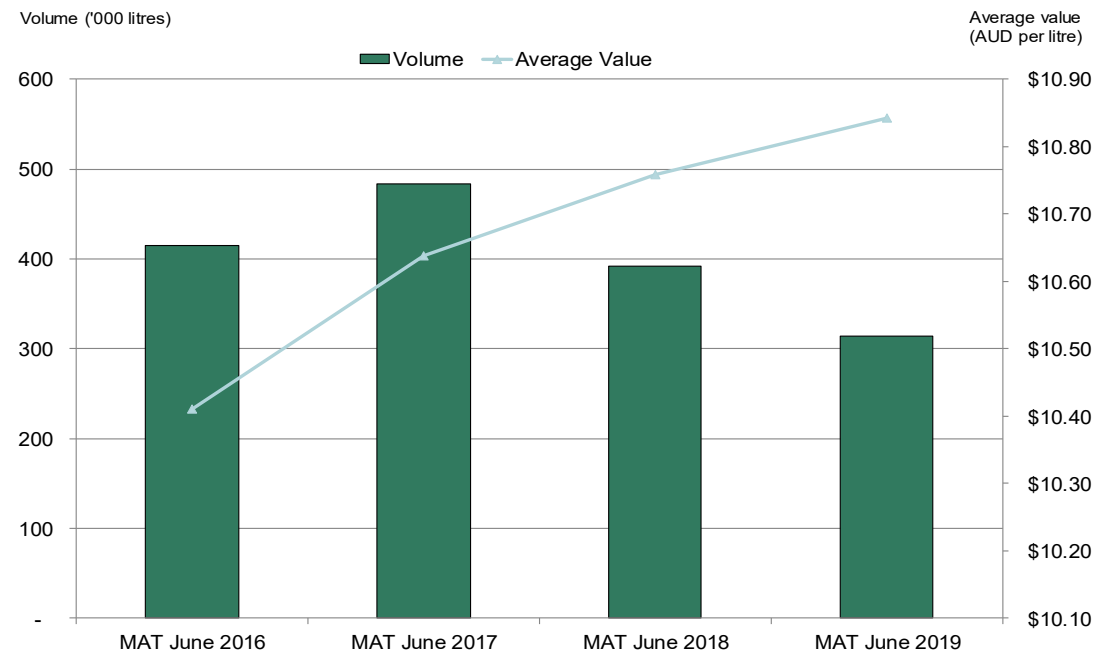
## Overview

### Total wine by price point



		MAT June 2018	MAT June 2019	Change
Red wine	Volume (litres)	254,006	200,947	-21%
	Value (AUD)	\$2,670,785	\$2,041,715	-24%
	Average value	\$10.51	\$10.16	-3%
White wine	Volume (litres)	137,186	113,049	-18%
	Value (AUD)	\$1,538,312	\$1,360,151	-12%
	Average value	\$11.21	\$12.03	7%
Total wine	Volume (litres)	391,948	314,410	-20%
	Value (AUD)	\$4,216,850	\$3,409,138	-19%
	Average value	\$10.76	\$10.84	1%

### Total volume and average value

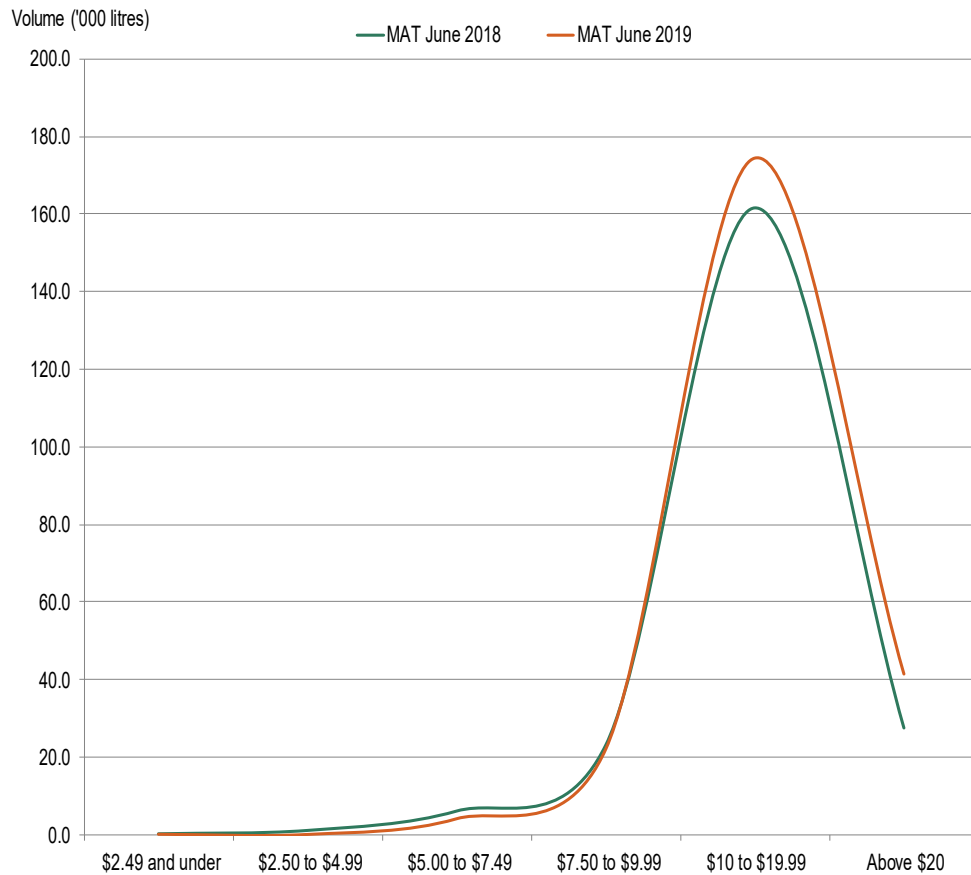


# Packaged wine exports to Singapore

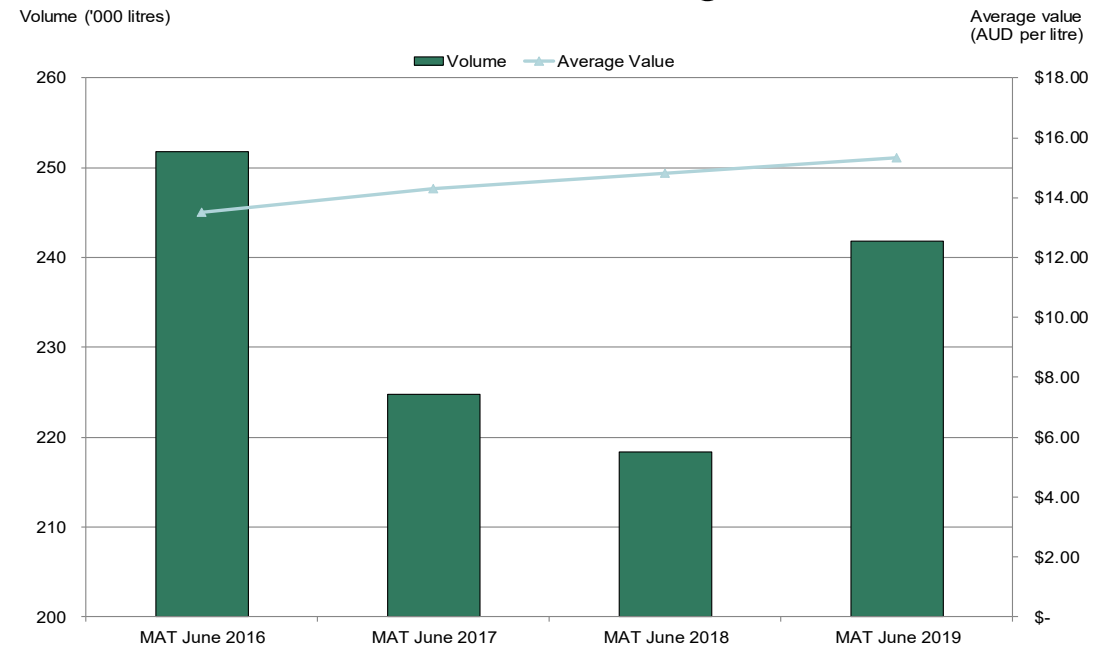
## Overview

		MAT June 2018	MAT June 2019	Change
Red wine	Volume (litres)	126,665	139,124	10%
	Value (AUD)	\$1,965,174	\$2,166,994	10%
	Average value	\$15.51	\$15.58	0%
White wine	Volume (litres)	90,024	102,642	14%
	Value (AUD)	\$1,248,026	\$1,540,385	23%
	Average value	\$13.86	\$15.01	8%
Total wine	Volume (litres)	218,390	241,820	11%
	Value (AUD)	\$3,233,457	\$3,708,200	15%
	Average value	\$14.81	\$15.33	4%

## Total wine by price point



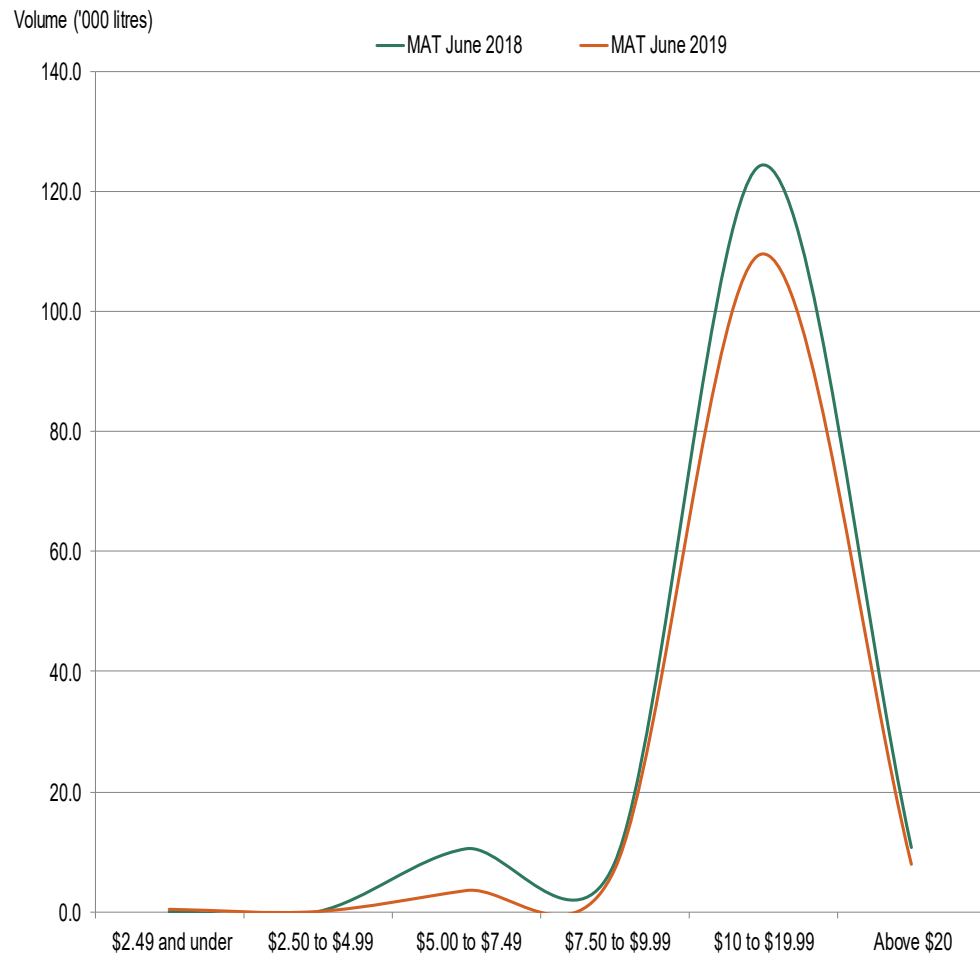
## Total volume and average value



# Packaged wine exports to Canada

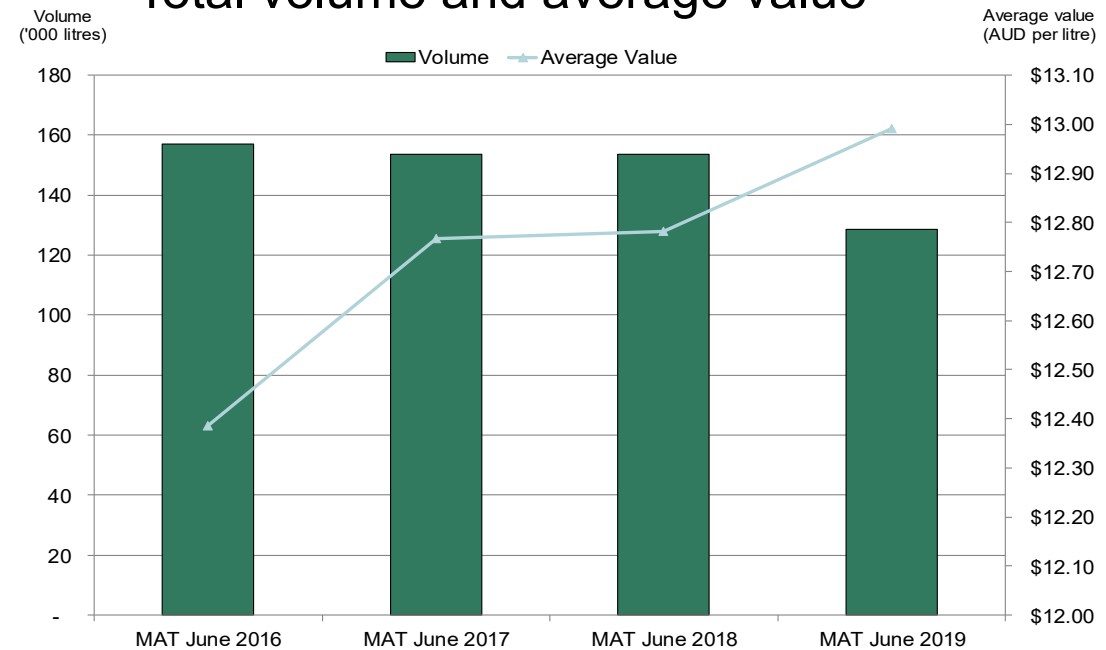
## Overview

### Total wine by price point



		MAT June 2018	MAT June 2019	Change
Red wine	Volume (litres)	122,139	89,826	-26%
	Value (AUD)	\$1,540,826	\$1,162,177	-25%
	Average value	\$12.62	\$12.94	3%
White wine	Volume (litres)	31,176	38,457	23%
	Value (AUD)	\$416,720	\$504,405	21%
	Average value	\$13.37	\$13.12	-2%
Total wine	Volume (litres)	153,585	128,486	-16%
	Value (AUD)	\$1,963,141	\$1,669,281	-15%
	Average value	\$12.78	\$12.99	2%

### Total volume and average value



# Notes & Definitions

**Export approvals:** Wine approved by Wine Australia for export on specified dates. Exports reported in this document refer to the date wine is shipped and not the date of approval. Note that the AUD FOB value of wine reported in this document may differ from export values reported by the Australian Bureau of Statistics (ABS). The divergence between the two values derives from differences between Wine Australia and the ABS in the method of converting the value of exports denominated in foreign currency to AUD. In the case of the Australia, the exporter makes the conversion when submitting wine for export approval while the ABS converts the value on the day of shipment, at the daily conversion rate. With the Wine Australia method, it is expected that some of the conversions will occur at hedged rates while this does not occur with the ABS method. When the Australian exchange rate is moving significantly the alternative methods will result in diverging valuations. Volumes reported by Wine Australia and the ABS differ only marginally due to the 'approval' versus 'shipment' basis of reporting as well as marginal differences in scope and definition.

**MAT:** Moving annual total - refers to the twelve months to the end of the nominated month.

**% Change :** Is calculated as the percentage change in the MAT for the immediate past 12 months compared to the preceding 12 months.

Formula: % Change =  $((\text{current MAT} - \text{preceding MAT}) / \text{preceding MAT}) \times 100$

**AUD:** Australian dollars

**FOB:** 'Free on board' value of the wine, where the point of valuation is where goods are placed on board the international carrier, at the border of the exporting country. The FOB value includes production and other costs up until placement on the international carrier but excludes international insurance and transport costs.

**Country:** In most instances, this indicates where the wine is consumed. In some instances, it may be the country at which the wine is off-loaded for bottling and/or trans-shipment to the country of final consumption.

**GI:** Geographical indications identify wines as originating in a region or locality.

# Notes & Definitions (continued)

**Still wine:** Still wine in bottles, casks, flagons or bulk containers.

**Bulk:** Wine shipped for repackaging elsewhere. This may involve containers with a capacity of 20 litres or more but will most often mean large shipping containers ranging in size between 10 000 and 24 000 litres.

**Cask or soft packs:** Plastic containers within cardboard outers usually carrying between 2 and 20 litres.

**Flagons:** Glass containers holding 2 litres or more.

**Bottles:** Glass containers holding less than 2 litres.

**Alternative packaging:** Includes: Flagon, Tetra-pak, PET and Aluminium

**Red wine:** Amounts reported may or may not include both dry red wine and rose

**White wine:** Amounts reported may or may not include both dry and sweet white wine

**Fermented sparkling:** Sparkling wine in which the effervescence is produced naturally through secondary fermentation in the bottle.