Wine Australia providing insights on Australian Wine

Export Report

Moving Annual Total (MAT)

To December 2017

Contents

Summary Report

Executive summary

- The value of exports increased by the highest rate since 2004
- Volume hit a calendar year record
- The average value of bottled wine increased to a record high, while the average value for bulk wine increased to the highest level since 2012
- Exports to Northeast Asia were the growth driver, with exports to China continuing to grow at an extraordinary rate
- There was encouraging growth at premium price points for the United States of America and the United Kingdom
- There was heartening growth to a range of smaller markets such as New Zealand, Singapore, the United Arab Emirates and the Netherlands

Commentary

Overview

In 2017, Australian exports of wine increased by 15 per cent in value to $2.56 billion, the highest annual growth rate since 2004. It was a record breaking year for volume, growing by 8 per cent to 811 million litres – a calendar year high. Merging these outcomes resulted in a 7 per cent increase in average value to $3.16, the highest level since 2009.

Bottled vs. bulk wine

The value of bottled wine increased by 17 per cent to $2.1 billion and the average value per litre grew by 3 per cent to a record $5.63, driven by an increase in demand for premium Australian wine, particularly in Northeast Asia. Wine exported in bulk also experienced growth, with total value increasing by 10 per cent to $440 million and average value per litre increasing by 6 per cent to $1.03, the highest average value since 2012. Bulk prices firming is an early sign of global under-supply already putting upward pressure on prices.

Exporter performance

During the year, there were 2210 active Australian wine exporters who shipped wine to 126 different overseas destinations. Of these, 1555 exporters contributed to the increase in value by either commencing exporting or increasing their exports. These exporters increased their total export revenue by $523 million (39 per cent). This increase was partially offset by exporters who declined in value or ceased exporting altogether; this group declined by $184 million (21 per cent).

The value of export for the top 10 exporters increased by 11 per cent to $1.56 billion, while the value for all other exporters increased by 22 per cent to $1 billion. This indicates that the growth is being shared by a broad cross-section of the Australian wine exporters.

Figure 1: Exports by price point (FOB)

Price segment (A$/litre)	MAT December 2017	Value change	Growth rate
$2.49 and under	$511,230,356	$76,436,923	18%
$2.50 to $4.99	$829,999,393	$42,768,086	5%
$5.00 to $7.49	$332,034,222	$48,491,468	17%
$7.50 to $9.99	$150,448,428	$8,126,188	6%
$10.00 to $14.99	$200,552,005	$30,711,339	18%
$15.00 to $19.99	$76,674,239	($10,110,144)	-12%
$20.00 to $29.99	$131,612,861	$49,267,099	60%
$30.00 to $49.99	$94,210,830	$32,374,491	52%
$50.00 to $99.99	$164,096,793	$35,281,907	27%
$100.00 to $199.99	$17,152,041	$4,715,133	38%
$200.00 +	$53,727,561	$21,643,089	67%
Total value	$2,561,738,728	$339,705,582	15%

Price points

There were healthy growth rates in almost all price points, revealing added value at both ends of the price spectrum (see Figure 1). Entry-level wines priced at $2.49 and under increased by the largest absolute value – $76 million. However, wines priced above $10 a litre grew by 29 per cent to a record $738 million. Wines priced above $200 a litre experienced the highest growth rate at 67 per cent. While these trends are consistent with the worldwide tendency for consumers to trade up and choose quality over quantity, it also demonstrates that there is increased interest in Australian wines overall, regardless of price point.

Wine styles

Red wine continued to be the most popular Australian wine style exported, contributing three-quarters of total export value. The value of red wine exports increased by 19 per cent to $1.9 billion. The value of white wine also grew, by 3 per cent to $552 million.

Commentary (continued)

Although a smaller category, sparkling wine also grew at an encouraging rate of 7 per cent to $49 million. Driving this increase was the growth in popularity of Australian sparkling wine in New Zealand and China, where the exported value increased by $2 million for each market.

In the red wine category, the top 5 variety label claims all recorded growth:

- Shiraz by 18 per cent to $601 million
- No variety label claim (red blend, dry red, etc.) by 12 per cent to $363 million
- Cabernet Sauvignon by 20 per cent to $341 million
- Shiraz/Cabernet Sauvignon by 57 per cent to $187 million, and
- Merlot by 17 per cent to $114 million.

The top 5 white variety label claims also all recorded growth:

- No variety label claim (dry white, sweet white, etc.) by 4 per cent to $217 million
- Chardonnay by 6 per cent to $182 million
- Sauvignon Blanc by 25 per cent to $42 million
- Pinot Grigio by 3 per cent to $32 million, and
- Pinot Gris by 13 per cent to $20 million.

Red wine exported in bulk containers increased by 3 per cent to 225 million litres, with the average value per litre increasing by 7 per cent to $1.14. The United Kingdom (UK) received 45 per cent of bulk red wine, although volume decreased by 5 per cent to 102 million litres. Volume to China increased by 85 per cent during the period to 40 million litres.

The volume of white wine bulk exports increased by 4 per cent to 204 million litres and the average price increased by 5 per cent to $0.90 per litre. The UK also received the largest share of white bulk shipments at 36 per cent. Volume is growing strongly in the United States of America (USA), its share of white bulk wine shipments growing from 20 to 30 per cent in the last year.

Destinations

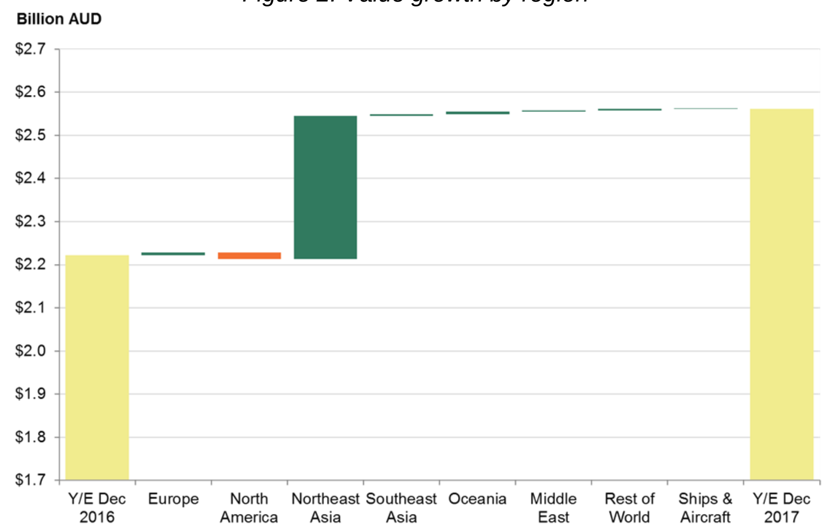
As illustrated in Figure 2, exports to Northeast Asia continued to drive export value growth, increasing by 47 per cent to more than $1 billion.

Exports also grew to:

- Europe by 1 per cent to $576 million
- Southeast Asia by 2 per cent to $165 million, and
- Oceania by 8 per cent to $94 million.

Exports to North America decreased by 2 per cent to $636 million, the driving factor being a change in business processes for some exporters to bottling wine in market rather than in Australia, and therefore shipping wine in bulk containers at lower average value.

Figure 2: Value growth by region



Commentary (continued)

The top 5 markets by value are:

- mainland China (33 per cent of total export value)
- United States of America (18 per cent)
- United Kingdom (14 per cent)
- Canada (7 per cent), and
- Hong Kong (5 per cent).

The top 5 markets by volume are:

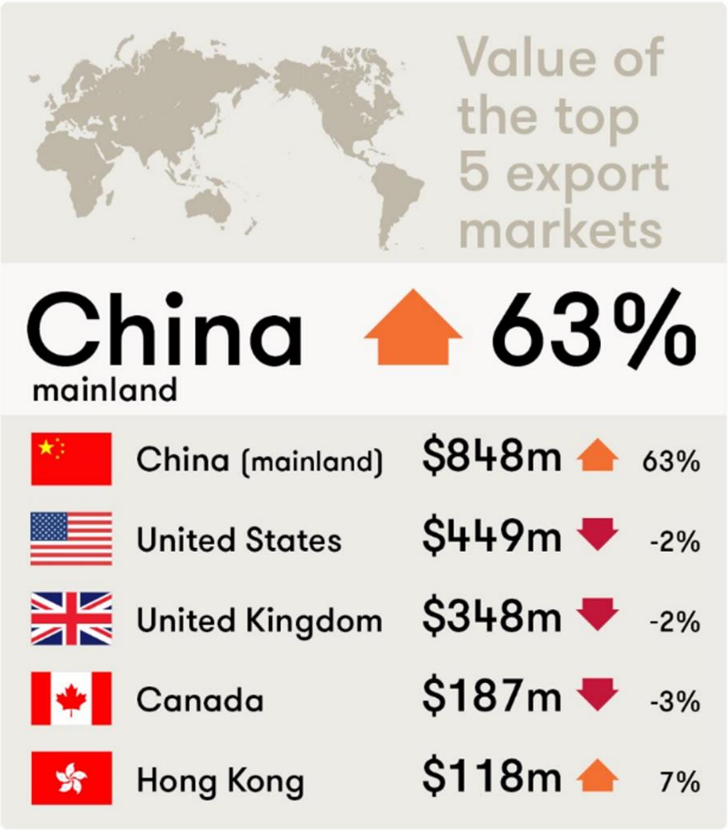
- United Kingdom (28 per cent share of total export volume)
- United States of America (21 per cent)
- mainland China (19 per cent)
- Canada (8 per cent), and
- Germany (5 per cent).

China

Mainland China

Australian wine has experienced extraordinary growth in exports to mainland China over the last decade. The implementation of the China–Australia Free Trade Agreement in 2015 gave impetus to an already strong market. The export figures for 2017 suggest Australia is well-placed for this trend to continue. The value of exports increased by 63 per cent to $848 million and volume by 54 per cent to 153 million litres. The average price increased by 6 per cent to $5.55 per litre FOB.

There were 1720 active exporters shipping wine to China during 2017, 40 per cent of these did not export to China the year before. One quarter (25 per cent) of exporters of Australian wine to China were wine grape levy payers (i.e. Australian wine producers), compared to 35 per cent globally. However, these Australian wine producers contributed 55 per cent of the total value of exports to China.



Australia is outpacing key competitors in the growth of wine exports to mainland China. It is ranked second behind France in market share, but number one in the average price of bottled wine among the five biggest exporters.

Commentary (continued)

There was growth in exports to mainland China across all price points (see Figure 3), from entry level/commercial wines through to Australia's fine wines.

Figure 3: Exports to mainland China by price point

Price segment (A$/litre)	MAT December 2017	Value change	Growth rate
$2.49 and under	$64,456,228	$31,649,593	96%
$2.50 to $4.99	$218,032,014	$67,773,998	45%
$5.00 to $7.49	$131,495,756	$48,621,257	59%
$7.50 to $9.99	$57,065,333	$16,711,780	41%
$10.00 to $14.99	$85,037,501	$31,480,988	59%
$15.00 to $19.99	$32,109,645	$5,295,312	20%
$20.00 to $29.99	$78,283,270	$37,326,711	91%
$30.00 to $49.99	$56,504,637	$27,488,624	95%
$50.00 to $99.99	$93,491,858	$41,806,005	81%
$100.00 to $199.99	$8,340,873	$4,913,111	143%
$200.00 +	$23,389,060	$13,833,354	145%
Total value	$848,206,175	$326,900,732	63%

Exports are heavily weighted to more premium wines. Mainland China is by far the biggest destination for exports of $10 or more per litre FOB (¥110 or more per bottle retail), accounting for more than half of all Australia's wine exports in this price range. These exports grew by 75 per cent to $377 million in the last year.

There has also been solid growth in entry level/commercial wines at $5 per litre and below (less than ¥60 per bottle retail). This reflects the increasing accessibility of imported wine in China and it moving to personal, everyday consumption. Wine is becoming a mainstream beverage enjoyed by a much broader base of consumers, and a beverage of choice for informal meals and relaxing at home.

Like the overall China market, red wine dominates Australia's exports to mainland China, accounting for 95 per cent of the export value. The growth in red wine exports has been strong, up 65 per cent to $804 million. Another important trend is the increasing acceptance of white wine in what is predominantly a red wine market. This is principally due to an increased number of younger Chinese people drinking wine who are more open to trying new styles. Australian white wines are part of this trend, with exports up 33 per cent to $30 million. Chardonnay (including blends) is the number one variety and exports increased by 32 per cent to $14 million. Other whites that grew include Riesling (up 77 per cent to $3 million) and Semillon (up 29 per cent to $2 million).

Willa Yang, Wine Australia's Head of Market, China said, 'We have seen continuous growth of Australian wine to mainland China, which is currently the most valuable market for Australia wine. China is still an immature wine market, but there are lots of opportunities for Australian premium wine to find new markets and customers as more and more Chinese consumers are learning more about wine. Australia has a reputation in mainland China as one of the premium wine producing countries and we will keep building on this good foundation to drive demand for Australian wine.'

Commentary (continued)

Hong Kong

Hong Kong is the fifth most valuable Australian wine export destination. In 2017, the value of exports to Hong Kong increased by 7 per cent to $118 million and volume increased by 4 per cent to 8 million litres.

The average value of exports to Hong Kong increased by 3 per cent to $14.06 per litre. Hong Kong has the highest average value among the top 30 destinations to which Australia exports and more than three-quarters of exports to Hong Kong are valued at $10 or more per litre. This indicates the success and popularity of some of Australia's finest wines in that market, where there is zero tax on wine. Australian fine wine exports to Hong Kong have steadily grown over the last decade and the territory is now the second largest destination for Australian wine exports above $10 per litre, behind mainland China. Like mainland China, red wine dominates Australian exports in this price segment, with a 96 per cent value share.

Australian wine will take centre stage with Australia as the Country of Honour at Vinexpo Hong Kong 2018 in May. Vinexpo Hong Kong is the key trade-only wine and spirits exhibition in the Asia-Pacific region. The invite-only event attracts top decision-making importers, buyers and sommeliers, and provides a forum for education and trade networking. This event will provide a platform for Australian wine to expand its already strong position in Hong Kong and the wider Asia region.

North America

United States of America

Exports to Australia's second biggest market by value, the USA, declined by 2 per cent to $449 million. Volume increased by 8 per cent to 172 million litres, resulting in a 9 per cent decrease in average value to $2.61 per litre.

The decline in value and increase in volume can be explained by looking at bottled and bulk exports. Bottled exports to the USA decreased by 6 per cent in value to $369 million, while exports in bulk containers increased by 24 per cent to $79 million. This shift is due to some major brands changing business processes from shipping in glass bottles to bottling their wine in-market.

Currently, Australian wine exports to the USA are heavily weighted to the commercial end with 95 per cent of the volume priced at below $5 per litre (less than US$8 per bottle retail). Australian exports in this segment declined by 2 per cent to $368 million. This is reflected in the retail figures. Australia holds a 13 per cent share of the off-trade market at US$4–7.99 per bottle according to IRI figures for the year ended September 2017. This price point is the biggest segment of the USA off-trade market with over a third share, but it is in decline.

Figure 4: Exports to the USA by price point

Price segment (A$/litre)	MAT December 2017	Value change	Growth rate
$2.49 and under	$92,004,970	$21,638,528	31%
$2.50 to $4.99	$276,284,385	($29,815,119)	-10%
$5.00 to $7.49	$22,323,469	($1,587,511)	-7%
$7.50 to $9.99	$13,699,191	($3,045,920)	-18%
$10.00 to $14.99	$18,940,442	($374,547)	-2%
$15.00 to $19.99	$10,282,694	$1,179,404	13%
$20.00 to $29.99	$6,848,563	$824,089	14%
$30.00 to $49.99	$4,655,686	$584,862	14%
$50.00 to $99.99	$2,420,341	$594,531	33%
$100.00 to $199.99	$709,905	$227,045	47%
$200.00 +	$662,124	$160,934	32%
Total value	$448,831,771	($9,613,702)	-2%

In sharp contrast, the positive trend towards Australian premium wines in the USA continues. Exports at $10 per litre or more (US$14 or more per bottle retail) increased by 8 per cent to $45 million. The growth in premium wine exports to the USA is also evident in retail figures. Off-trade sales figures from IRI show at US$11 or more per bottle, Australian sales grew by 32 per cent while the total sales in this segment increased by 7 per cent.

Commentary (continued)

Aaron Ridgeway, Wine Australia's Head of Market, North America said, 'Crucially, Australian wines that sell for over $15 a bottle retail ended the year in strong growth. If consumers continue to trade up and exchange rates remain favourable so that exporters can invest and support the premiumisation trend, the category's position will strengthen in 2018.'

Canada

Canada is Australia's fourth biggest market by value but has been a challenging market in recent times. In 2017, the value of exports to Canada declined 3 per cent to $187 million while volume increased 2 per cent to 62 million litres. An increase in bulk wine exports and a decline in bottled exports was the principal factor in the decline in value. Bottled exports fell by 7 per cent to $151 million, more than offsetting an 18 per cent increase in bulk exports to $33 million.

Canada is a particularly strong market for Australia's premium white wines. Canada is Australia's number one market by value for white wines at A$5 or more per litre (C$12 or more per bottle retail).

Five provinces accounted for 98 per cent of Australian wine export value to Canada:

- Ontario (38 per cent share)
- British Columbia (24 per cent)
- Quebec (22 per cent)
- Alberta (9 per cent), and
- Nova Scotia (5 per cent).

Exports to Quebec increased marginally and were stable to Alberta but declined to Ontario, British Columbia and Nova Scotia.

Europe

United Kingdom

More Australian wine is shipped to the UK than to any other market. In 2017, 223 million litres of Australian wine were exported to the UK placing it ahead of the USA (172 million litres) and mainland China (153 million litres). However, 80 per cent of this wine is shipped in bulk and bottled in market, which impacts the reported value of exports as Wine Australia reports the value when it leaves Australia, rather than its value in-market. Furthermore, not all Australian wine exported to the UK is consumed there, some of it is destined for other European markets.

Australia remains the number one country of origin in the UK off-trade market, but is third in the on-trade behind France and Italy. Of the top 14 brands in the UK off-trade by value, 6 are Australian (IRI).

Australian wine exports to the UK declined in value by 2 per cent to $348 million and in volume by 5 per cent. However, the overall value decline was due to an 8 per cent decline in bulk wine exports to $169 million, which more than offset a 5 per cent increase in bottled exports to $179 million.

This reflects the market trends that have seen wine sales in the UK off-trade grow at above £5 per bottle, while sales under £5 per bottle are declining. The big volume commercial end of the UK market has seen retail consolidation resulting in reduced product ranges. Brexit negotiations are also causing uncertainty and while the subsequent appreciation of the Australian dollar has negatively impacted on exports, the British pound (GBP) has recovered to a degree, the GBP/AUD rising by 4 per cent in the last 6 months. However, the excise duty on alcohol is increasing faster than inflation and this has had a bigger impact on the commercial end of the market compared to the premium end, resulting in some price bracket creep.

Commentary (continued)

These factors contributed to a 2 per cent decline in Australian exports of commercial wines at $2.50–4.99 per litre to $95 million (less than £9 per bottle retail). The decline in this segment was a major influence on the overall decline in exports to the UK.

At the other end of the price spectrum, there was solid growth in exports at $7.50–9.99 per litre (£11–12.99 per bottle retail), up by 3 per cent to $13 million (see Figure 5).

Figure 5: Exports to the United Kingdom by price point

Price segment (A$/litre)	MAT December 2017	Value change	Growth rate
$2.49 and under	$189,401,609	$177,760	0%
$2.50 to $4.99	$95,486,037	($2,393,708)	-2%
$5.00 to $7.49	$23,871,830	($3,759,351)	-14%
$7.50 to $9.99	$12,791,034	$386,860	3%
$10.00 to $14.99	$13,209,485	($1,515,843)	-10%
$15.00 to $19.99	$4,510,514	($376,031)	-8%
$20.00 to $29.99	$3,295,166	$48,066	1%
$30.00 to $49.99	$2,689,246	($29,675)	-1%
$50.00 to $99.99	$1,206,096	$31,305	3%
$100.00 to $199.99	$731,450	$71,743	11%
$200.00 +	$903,128	$266,108	42%
Total value	$348,095,593	($7,092,764)	-2%

Laura Jewell MW, Wine Australia's Head of Market, EMEA said 'After 18 months of uncertainty following the Brexit referendum and currency volatility, we are finally seeing some encouraging signs of stability and even growth, particularly in the off-trade. The latest IRI figures show a value growth of 2% MAT at the end of November, and retailers are revamping their premium own label ranges. Even the discounters are looking to Australia to provide value for money, regionally labelled wines in their own label range. Australia continues to shine in the UK wine competitions, showing the quality and class of what we have to offer.'

Steve Grimley, Managing Director, Loom Wine Group said 'Our business, Loom Wine, has always taken a long-term approach to our export markets. We work intimately with our customers, ensuring our shared ideals and in most parts aspirations are clearly and consistently communicated. After many years developing these relationships in the volume segment, we've recently expanded our offering via our small batch, experimental brand 'The 5OS Project', which has been a great success and contributed significantly to our overall export value. With the vast majority of our attention focused on the UK market, we've been really surprised at how well our wines continue to be received in all segments of the market; it's obviously competitive but it shows that if you pick you partners well there's plenty of upside still to be had.'

Germany

Australia exported 40 million litres to Germany at a value of $57 million in 2017. Value increased by 26 per cent and volume by 13 per cent. Germany is Australia's eighth biggest market by value and fifth biggest by volume. The lower value ranking is due to more than 80 per cent of Australian wine being shipped in bulk containers.

Reflecting the bulk shipments, exports below $2.50 per litre (under €3 per bottle retail) increased by 25 per cent to $37 million, with much of this wine destined for German supermarkets. There was also growth at the premium end, with exports at $10 or more per litre (€11 or more per bottle retail) increasing by 26 per cent to $4 million. Since 2011, the value of exports at $10 or more per litre to Germany has grown by an average of 11 per cent per annum. This suggests that while Germans are very price conscious, there is a market for Australia's finer wines.

More than three-quarters of the wine Germany imports is from the big three European producers – Italy, France and Spain. All three countries recorded historically low harvests in 2017, which could present opportunities for Australian wine producers.

Commentary (continued)

Free trade agreements – two years on

Japan

Japan is the tenth biggest destination for Australian wine exports. Since the Japan–Australia Economic Partnership Agreement (JAEPA) came into force on 15 January 2015, Australian wine exports to Japan have increased from $39 million to $47 million.

Under the JAEPA, the tariff on bulk wine was immediately cut to zero and this has contributed to bulk wine exports increasing by 51 per cent to $4 million in 2017. The tariff on bottled exports will reduce to zero by 2022. The tariff reduction to date has provided a boost to the volume of bottled exports, up 4 per cent to 8 million litres, the largest volume of bottled exports in a decade. This has come at the expense of price, with the average value of bottled exports down 5 per cent to $4.96 per litre FOB. This is not unexpected as demand for commercial wines is more price sensitive than for premium wines. Consequently, the value of bottled exports to Japan declined by 1 per cent to $38 million.

Hiro Tejima, Wine Australia's Senior Manager Regional Development APAC, said, 'Japan is the second largest and one of the most advanced wine markets in Asia. Leading wine professionals across Asia often take cues from top Japanese sommeliers with solid track records in competitions, and of trend-setting wine retailers and restaurants. Another sign of its maturity as a wine market is the price pressure – like the UK and USA markets – which appears not to have eased despite the improved economy fuelled by the strong inbound tourism and the upcoming 2020 Tokyo Olympic Games. The most exciting phenomenon in Japan is the rise of a new wave of sommeliers and wine retailers who share views and excitement of wine with top Australian, American, Canadian and British sommelier fraternities.'

South Korea

The Korea–Australia Free Trade Agreement (KAFTA) came in to force on 12 December 2014, removing a 15 per cent tariff on Australian wine and helping bring Australia to an even playing field with its competitors.

Since the introduction of KAFTA, exports to South Korea have increased from $8 million to $14 million. The excitement generated at trade events such as the Australian Wine Grand Tasting Seoul in September 2017 offers optimism for future growth prospects and has contributed to a 5 per cent increase in Australian wine export value in 2017. This growth was mainly in the middle price points; $2.50 to $4.99 increased by 69 per cent to $3.7 million and $5 to $7.49 increased by 17 per cent to $4 million.

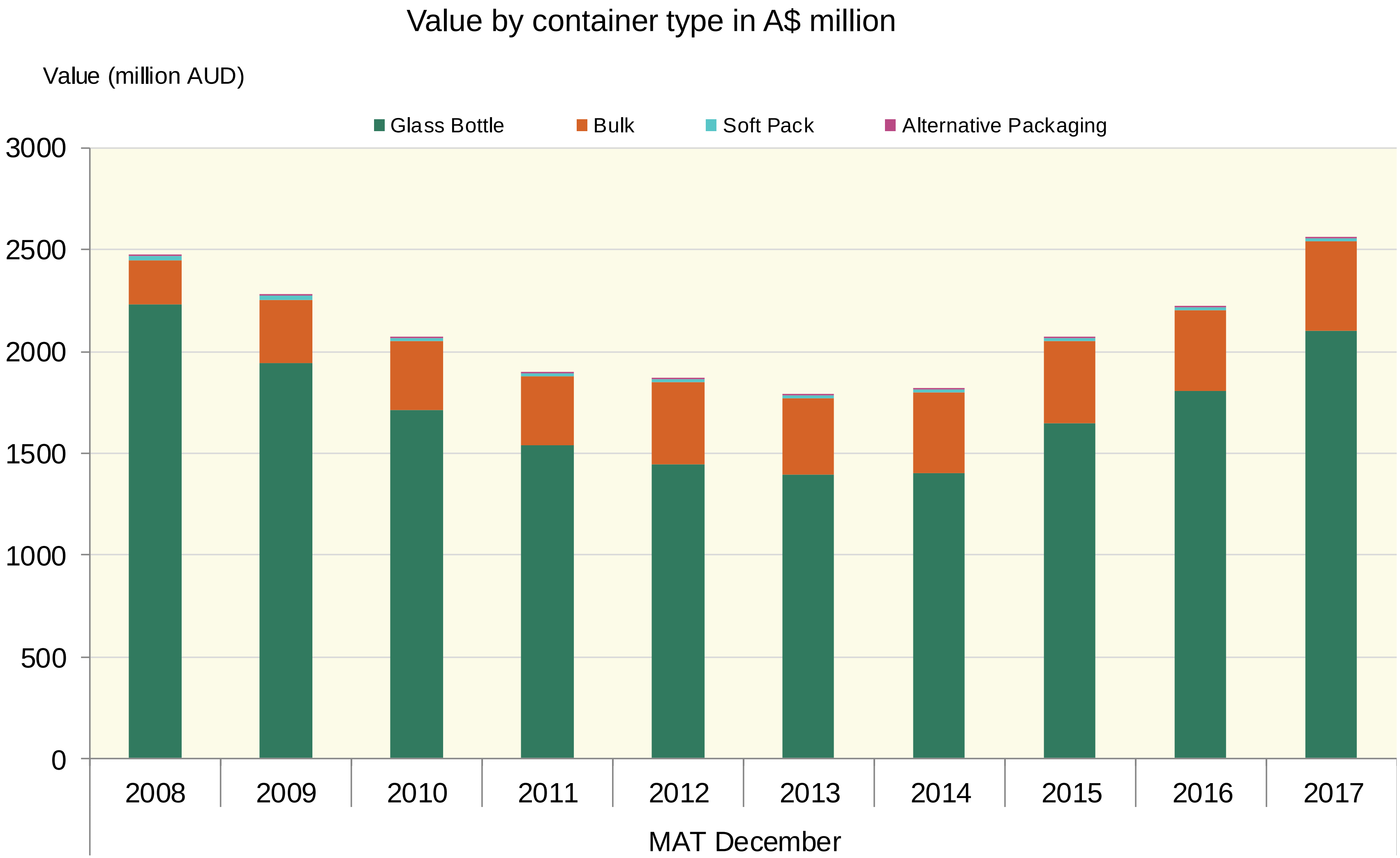
Mr Tejima said, 'South Korea somewhat follows the Japanese trends, with greater interests shown in cooler-climate, alternative and natural wine offerings from Australia, while more classic expressions of Australian wine are still widely expected and enjoyed by the Korean trade and consumers.'

Other markets

Other markets with encouraging growth figures included:

- New Zealand by 8 per cent to $83 million
- Singapore by 9 per cent to $75 million
- Netherlands by 16 per cent to $36 million
- United Arab Emirates by 12 per cent to $22 million
- Thailand by 9 per cent $20 million
- Finland by 11 per cent to $17 million, and
- Belgium by 13 per cent to $16 million.

Historic overview of exports



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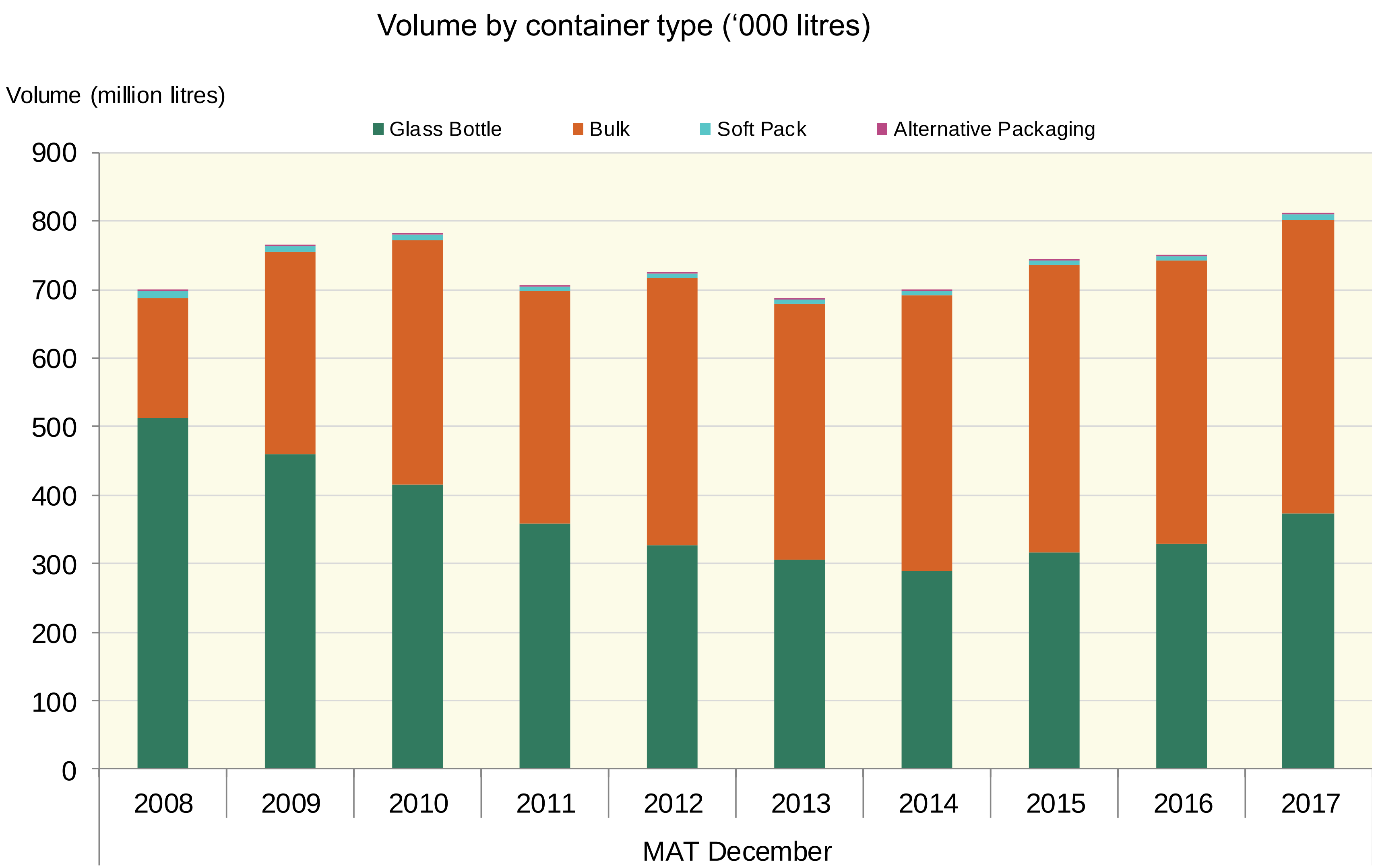
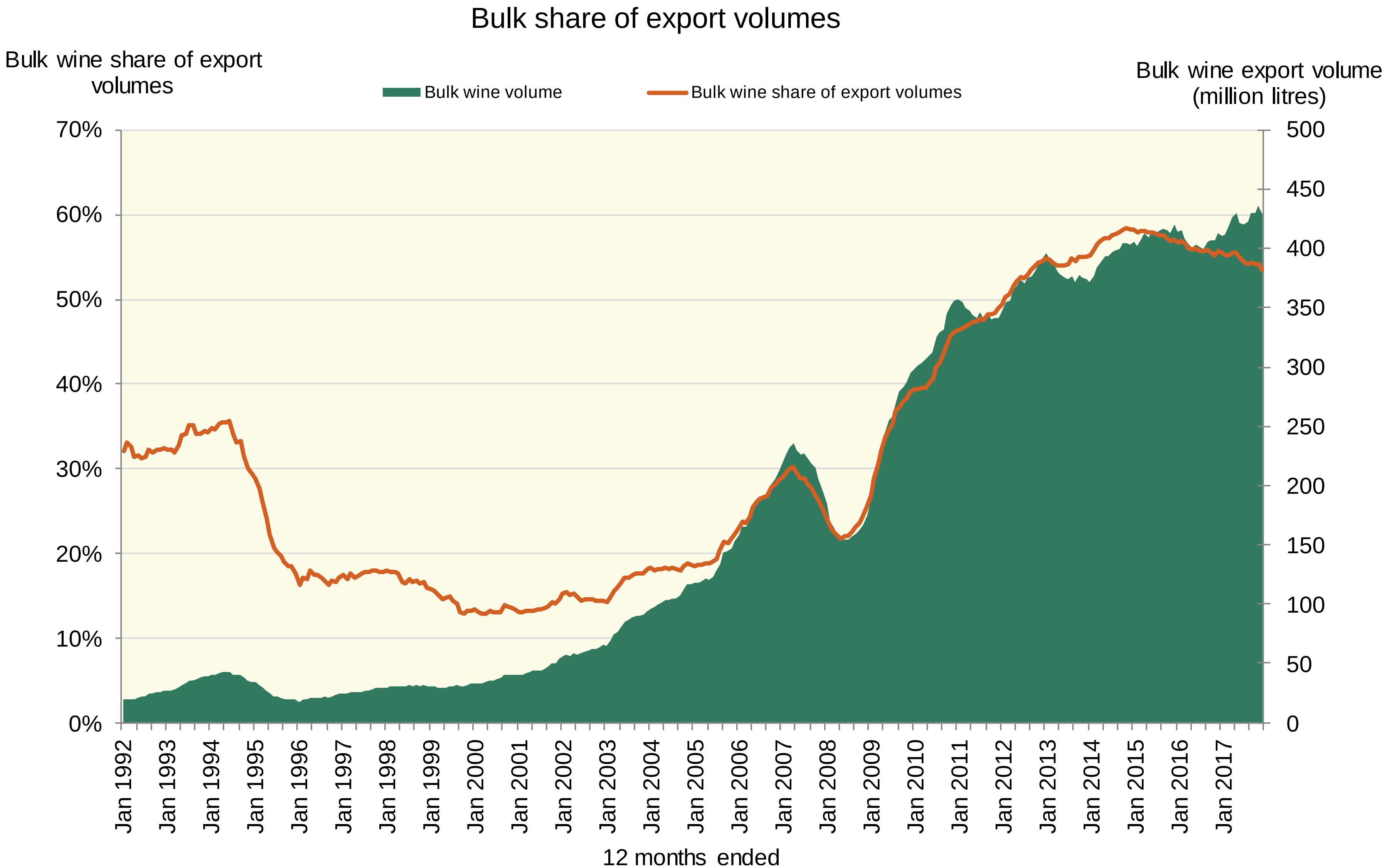
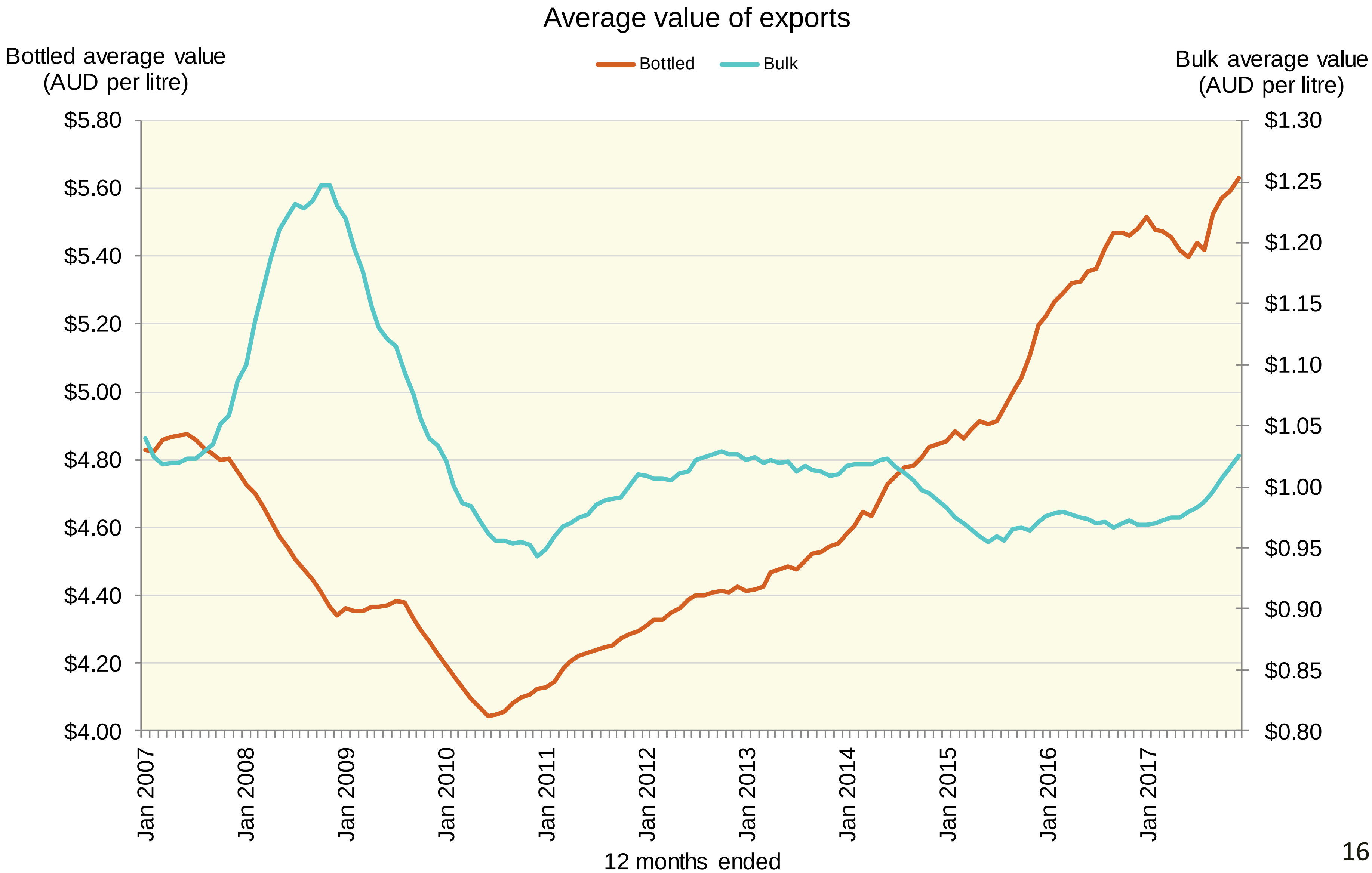


Historic overview of exports

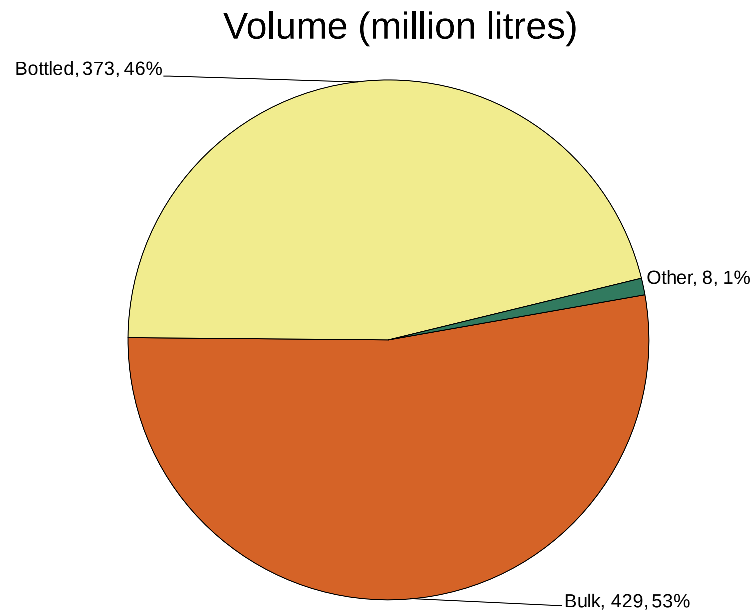


Historic overview of exports

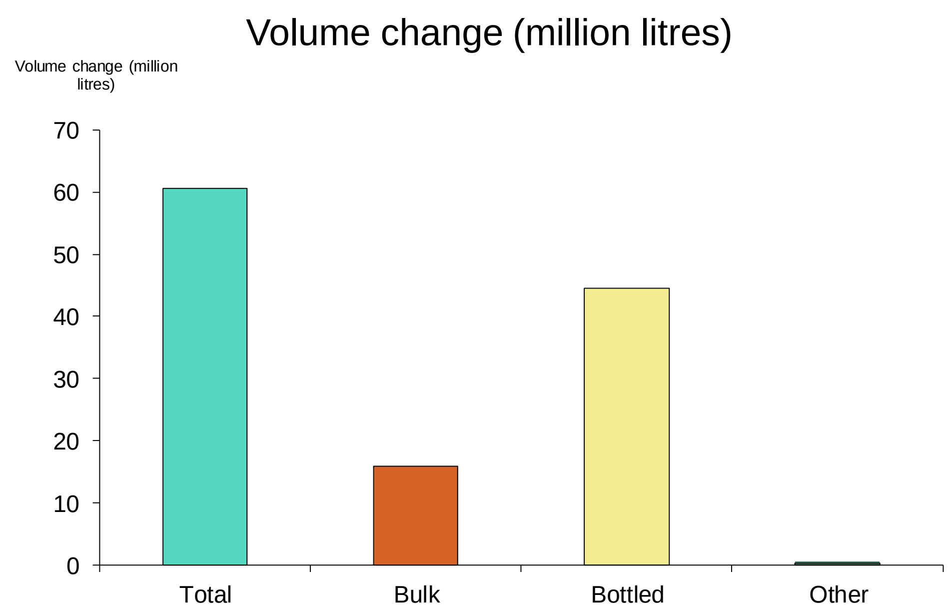


Exports by container type

MAT December 2017



		Volume (ML)	Value (A$M FOB)	Average Value (A$/L FOB)
Bottled	2017	373	2,102	5.63
	Change	14%	17%	3%
	Share	46%	82%	
Bulk	2017	429	440	1.03
	Change	4%	10%	6%
	Share	53%	17%	
Other	2017	8	19	2.31
	Change	3%	9%	5%
	Share	1%	1%	
Total	2017	811	2,562	3.16
	Change	8%	15%	7%
	Share	100%	100%	



“Other” includes wine in soft-packs and alternative packaging

Wine exports by country, container and colour

Value for MAT December 2017

	Glass Bottle Red Wine		Bulk Red Wine		Other Red Wine		Glass Bottle White Wine		Bulk White Wine		Other White Wine		Sparkling Wine		Other Wine		Total Wine	
	MAT December 2017 (A$ '000s)	Change %	MAT December 2017 (A$ '000s)	Change %	MAT December 2017 (A$ '000s)	Change %	MAT December 2017 (A$ '000s)	Change %	MAT December 2017 (A$ '000s)	Change %	MAT December 2017 (A$ '000s)	Change %	MAT December 2017 (A$ '000s)	Change %	MAT December 2017 (A$ '000s)	Change %	MAT December 2017 (A$ '000s)	Change %
China, Pr	749,066	62%	54,489	++	691	-47%	26,693	39%	3,609	1%	55	-7%	7,572	35%	6,030	33%	848,206	63%
United States Of America	229,651	-6%	23,274	-16%	623	30%	119,470	-15%	55,577	56%	0	-95%	4,484	0%	15,752	++	448,832	-2%
United Kingdom	107,297	4%	103,759	-6%	0	-100%	67,127	7%	64,639	-12%	9	-91%	4,190	0%	1,074	-19%	348,096	-2%
Canada	104,054	-8%	16,324	24%	465	-25%	41,171	-8%	16,867	12%	1,623	++	3,664	3%	2,369	43%	186,537	-3%
Hong Kong	107,651	8%	0	-100%	1,380	10%	6,595	-4%	0	na	318	15%	1,427	37%	632	-38%	118,003	7%
New Zealand	49,599	6%	6,755	26%	568	-29%	9,022	20%	6,572	-19%	502	5%	6,995	39%	2,984	0%	82,998	8%
Singapore	60,154	10%	0	na	451	17%	7,228	8%	0	na	110	-28%	6,670	3%	731	-6%	75,345	9%
Germany, Federal Republic	18,524	6%	19,637	51%	0	na	4,624	89%	14,284	17%	0	na	152	33%	64	47%	57,286	26%
Malaysia	46,948	-7%	0	na	47	-77%	2,601	-2%	0	na	2	-89%	180	28%	267	9%	50,046	-7%
Japan	19,806	-1%	2,454	48%	2,283	9%	10,328	-9%	1,605	56%	1,035	27%	5,258	9%	4,226	8%	46,994	3%
Netherlands	14,053	8%	3,765	16%	0	na	12,640	34%	4,750	46%	0	na	817	0%	273	-83%	36,297	16%
United Arab Emirates	13,730	19%	31	-97%	674	18%	5,756	26%	0	na	461	21%	1,067	-8%	520	15%	22,238	12%
Sweden	11,254	-4%	2,811	-5%	0	na	5,460	-7%	1,302	86%	0	na	457	-40%	15	-57%	21,300	-3%
Denmark	9,126	-9%	5,017	-9%	0	na	3,127	-22%	2,564	1%	0	na	624	-21%	697	89%	21,155	-9%
Thailand	12,887	2%	779	55%	1,130	46%	3,516	27%	264	++	374	39%	1,013	-6%	74	-54%	20,036	9%
Finland	7,018	13%	3,163	25%	0	na	2,588	11%	2,829	0%	0	na	1,100	2%	362	-16%	17,061	11%
Belgium	4,386	8%	2,853	-18%	0	na	4,376	32%	3,918	36%	0	na	446	-8%	161	++	16,140	13%
Korea, R	10,457	3%	0	na	903	40%	2,438	1%	0	na	41	++	329	-29%	269	++	14,437	5%
Ireland	7,748	-16%	0	-100%	0	na	6,255	-9%	62	na	0	na	158	18%	20	-86%	14,244	-13%
Taiwan Province	11,323	-24%	0	-100%	243	3%	1,065	11%	0	na	101	9%	130	-65%	289	5%	13,151	-22%
Rest of the world	58,756	9%	11,426	-30%	1,691	0%	20,513	18%	4,473	-22%	1,304	5%	2,579	-23%	2,594	30%	103,337	2%
World	1,653,489	21%	256,538	10%	11,150	1%	362,592	-1%	183,316	10%	5,935	28%	49,311	7%	39,405	46%	2,561,739	15%

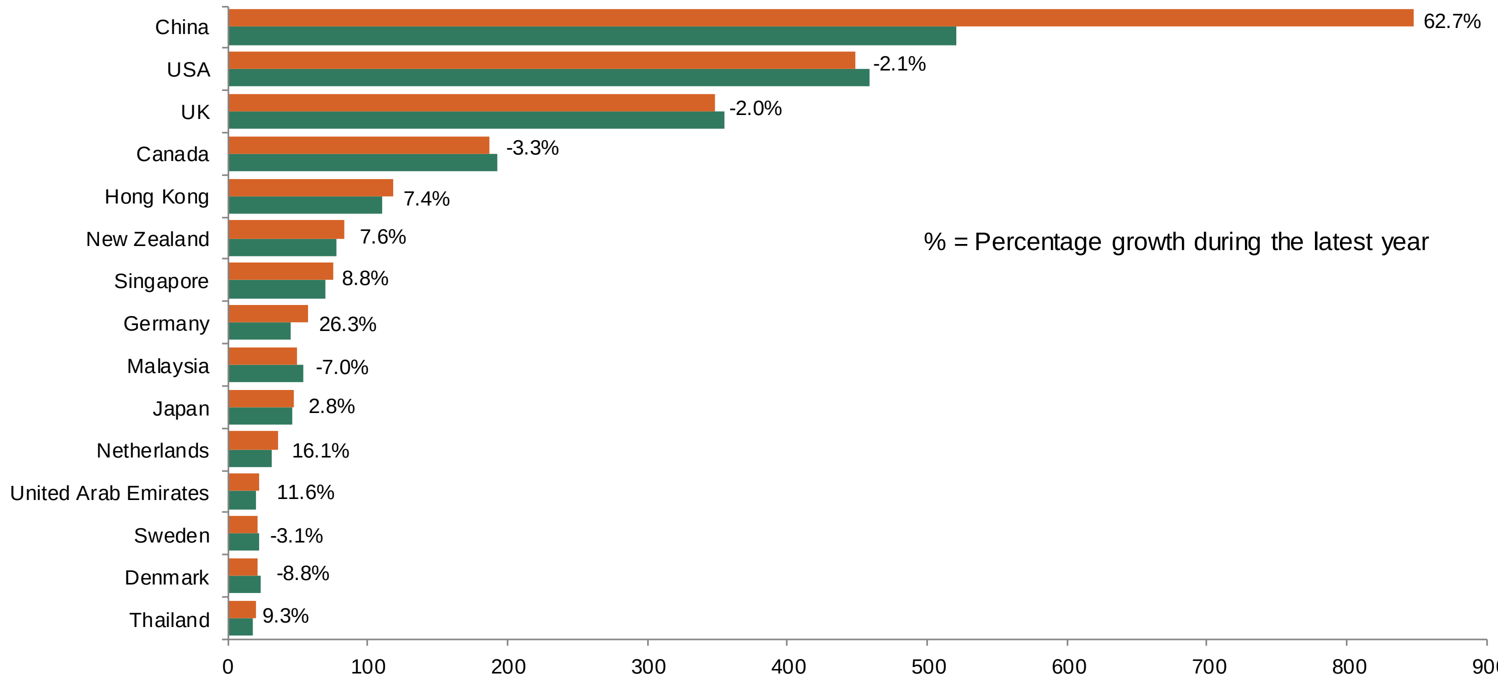
Wine exports
by country, container and colour

Volume for MAT December 2017

	Glass Bottle Red Wine		Bulk Red Wine		Other Red Wine		Glass Bottle White Wine		Bulk White Wine		Other White Wine		Sparkling Wine		Other Wine		Total Wine	
	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %
United Kingdom	24,872	13%	102,113	-5%	0	-100%	20,943	22%	74,230	-15%	1	-97%	969	-4%	263	-12%	223,392	-5%
United States Of America	55,728	-5%	16,094	-22%	182	27%	34,406	-12%	60,440	54%	0	-98%	795	2%	4,386	++	172,032	8%
China, Pr	102,727	50%	40,389	85%	315	-40%	4,311	39%	2,700	-24%	25	-18%	1,353	35%	974	29%	152,794	54%
Canada	17,251	-4%	16,688	14%	147	-14%	9,146	-8%	17,549	1%	346	37%	628	-3%	484	60%	62,239	2%
Germany, Federal Republic	5,111	6%	16,781	19%	0	na	1,811	48%	16,613	7%	0	na	14	48%	13	75%	40,343	13%
New Zealand	9,588	8%	5,899	6%	289	-30%	2,839	39%	8,672	-18%	200	-25%	1,379	25%	473	-38%	29,339	-1%
Netherlands	4,112	15%	3,686	6%	0	na	3,957	39%	5,523	40%	0	na	232	20%	93	-81%	17,602	21%
Japan	3,730	4%	1,900	63%	1,371	5%	2,087	-8%	1,664	57%	579	10%	1,176	31%	896	7%	13,404	15%
Denmark	1,413	-17%	4,833	-21%	0	na	747	-22%	3,130	-4%	0	na	134	-13%	174	++	10,432	-15%
Belgium	756	6%	2,775	-22%	0	na	1,008	27%	4,652	31%	0	na	105	17%	36	++	9,332	7%
Hong Kong	6,512	5%	0	-100%	564	12%	976	2%	0	na	139	12%	139	17%	64	-34%	8,393	4%
Finland	1,153	13%	2,264	13%	0	na	537	14%	2,822	-3%	0	na	230	22%	89	-7%	7,095	6%
Italy	99	32%	5,295	-45%	0	na	38	-18%	1,530	-43%	0	na	0	50%	0	na	6,963	-44%
Sweden	2,368	2%	1,684	-7%	0	na	1,544	5%	734	52%	0	na	97	-38%	1	-89%	6,429	3%
Singapore	3,863	6%	0	na	244	20%	952	9%	0	na	42	-41%	657	11%	77	3%	5,835	7%
Thailand	2,121	37%	611	42%	604	38%	865	43%	264	++	221	32%	143	0%	16	-56%	4,846	39%
France	165	0%	2,239	-11%	0	na	75	13%	2,082	2%	0	na	0	-100%	0	-100%	4,560	-5%
Malaysia	3,777	-3%	0	na	29	-77%	483	1%	0	na	1	-90%	34	++	44	17%	4,367	-4%
Ireland	2,077	-11%	0	-100%	0	na	2,029	1%	52	na	0	na	43	11%	3	-88%	4,204	-6%
United Arab Emirates	1,438	14%	26	-86%	416	16%	966	10%	0	na	319	25%	181	-23%	148	11%	3,494	6%
Rest of the world	12,857	15%	2,086	-14%	1,275	9%	4,953	18%	864	-27%	690	9%	495	-28%	686	38%	23,907	9%
World	261,720	17%	225,363	3%	5,436	1%	94,672	3%	203,521	4%	2,563	8%	8,804	9%	8,921	54%	811,001	8%

Exports by top 15 destinations

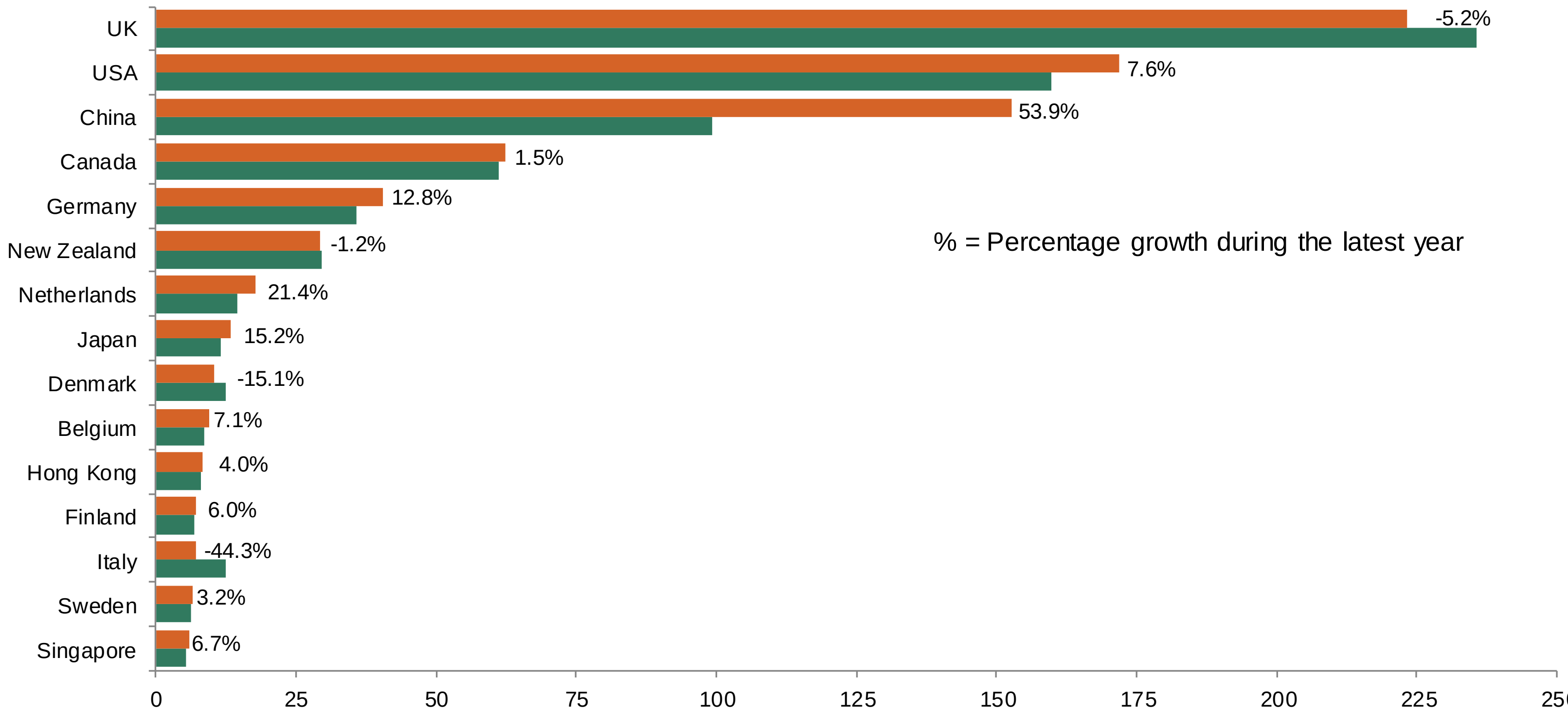
Value (million A$) for MAT December 2017



	Thailand	Denmark	Sweden	United Arab Emirates	Netherlands	Japan	Malaysia	Germany	Singapore	New Zealand	Hong Kong	Canada	UK	USA	China
2017	20.0	21.2	21.3	22.2	36.3	47.0	50.0	57.3	75.3	83.0	118.0	186.5	348.1	448.8	848.2
2016	18.3	23.2	22.0	19.9	31.3	45.7	53.8	45.4	69.2	77.1	109.9	192.9	355.2	458.4	521.3

Exports
by top 15 destinations

Volume (million litres) for MAT December 2017

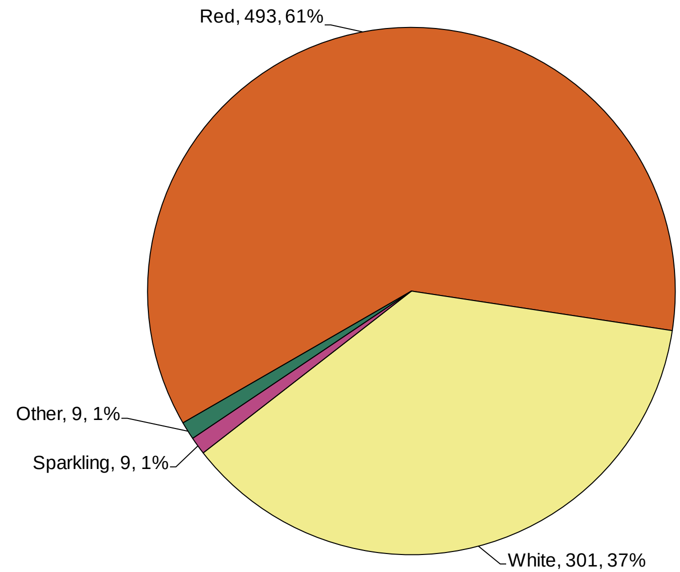


	Singapore	Sweden	Italy	Finland	Hong Kong	Belgium	Denmark	Japan	Netherlands	New Zealand	Germany	Canada	China	USA	UK
2017	5.8	6.4	7.0	7.1	8.4	9.3	10.4	13.4	17.6	29.3	40.3	62.2	152.8	172.0	223.4
2016	5.5	6.2	12.5	6.7	8.1	8.7	12.3	11.6	14.5	29.7	35.8	61.3	99.3	160.0	235.7

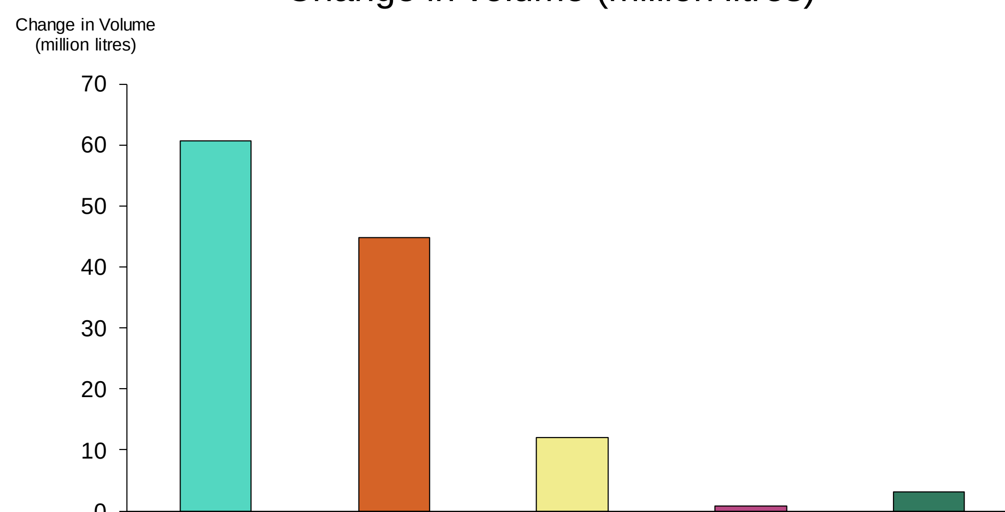
Exports by colour/ wine style

MAT December 2017

Volume (million litres)



Change in volume (million litres)



	Total exports	Red	White	Sparkling	Other
% change	8%	10.0%	4.2%	9.1%	54%
Vol change	60.6	44.8	12.0	0.7	3.1

Bottled wine exports report

Bottled exports by price point and destination

Value (‘000 A$) for MAT December 2017

	$2.49 and under		$2.50 to $4.99		$5.00 to $7.49		$7.50 to $9.99		$10.00 to $19.99		$20.00 to $49.99		$50.00 and above		Total	
	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %
China	10,571	23%	214,575	47%	129,963	60%	57,065	42%	117,128	46%	134,788	93%	125,222	94%	789,312	61%
USA	16,578	53%	272,567	-10%	22,177	-7%	13,516	-18%	29,223	3%	11,504	14%	3,792	35%	369,357	-6%
UK	27,957	116%	89,262	-1%	23,342	-15%	12,387	0%	17,711	-10%	5,984	0%	2,841	15%	179,483	5%
Canada	3,521	274%	45,282	-12%	60,141	-1%	19,302	-19%	19,595	-10%	2,520	-4%	710	-62%	151,070	-7%
New Zealand	2,507	874%	31,636	10%	18,569	0%	6,855	6%	5,637	-14%	1,319	0%	2,001	392%	68,524	10%
Netherlands	5,605	737%	17,233	-12%	2,939	-3%	565	12%	974	22%	311	98%	116	164%	27,742	12%
Hong Kong	30	-71%	9,963	17%	9,046	-12%	6,452	3%	20,805	12%	22,701	16%	47,305	5%	116,302	7%
Japan	692	59%	20,073	3%	5,671	5%	4,057	-13%	4,858	-14%	2,078	-5%	463	-11%	37,892	-1%
Germany	6,636	34%	8,527	-2%	2,637	49%	1,625	0%	2,686	31%	914	26%	339	-5%	23,364	16%
Singapore	174	-39%	6,571	14%	4,719	6%	3,596	-8%	20,580	-8%	14,970	50%	24,138	10%	74,749	9%
Malaysia	179	29%	4,887	10%	9,401	26%	2,142	-15%	5,351	-70%	12,912	111%	15,123	0%	49,995	-7%
Ireland	2,220	19%	9,269	-14%	1,282	-44%	890	5%	302	-34%	162	-2%	57	223%	14,182	-14%
Sweden	1,455	115%	9,109	-2%	2,855	-25%	2,487	-8%	961	-31%	259	-32%	61	-44%	17,186	-6%
Thailand	315	-2%	7,588	61%	2,150	43%	1,710	-15%	1,985	-54%	1,739	92%	2,002	-32%	17,490	5%
United Arab Emirat	35	-48%	5,507	-4%	3,438	87%	1,603	-13%	3,582	29%	2,547	-12%	4,220	72%	20,933	19%
Denmark	806	213%	3,885	-22%	2,452	-38%	2,758	11%	2,386	9%	1,059	11%	228	-31%	13,574	-10%
Korea, R	36	-94%	3,470	61%	4,041	16%	1,072	-8%	2,720	-21%	1,672	8%	475	-37%	13,486	3%
Finland	386	996%	3,727	-5%	2,431	6%	1,972	-14%	2,374	90%	172	-31%	6	-87%	11,069	10%
Philippines	85	243%	5,890	30%	1,481	35%	403	33%	969	38%	284	11%	378	53%	9,491	33%
Belgium	705	234%	4,177	14%	1,792	46%	862	8%	1,332	14%	412	-33%	88	-59%	9,369	18%
Other	1,585	37%	35,698	17%	13,401	15%	7,890	-6%	16,031	11%	7,511	-1%	5,411	-50%	87,528	2%
Total	82,077	81%	808,898	6%	323,927	17%	149,209	5%	277,189	8%	225,821	57%	234,976	36%	2,102,097	17%

Bottled exports by price point and destination

Volume (‘000 litres) for MAT December 2017

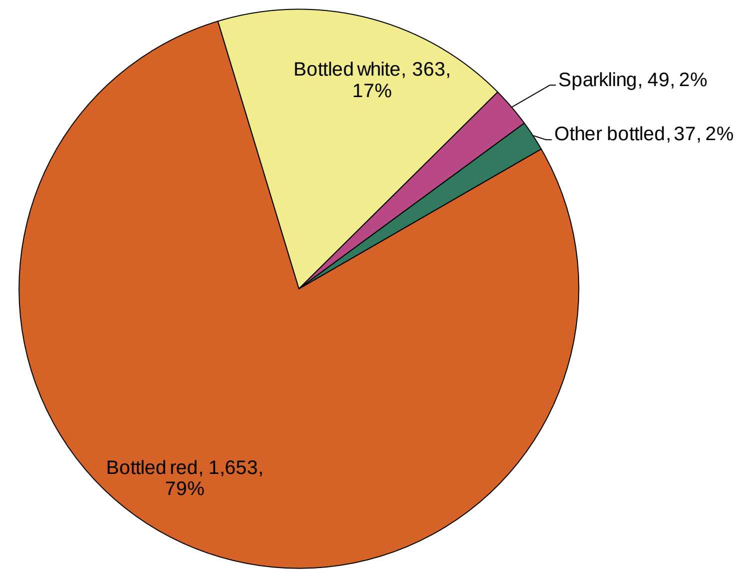
	$2.49 and under		$2.50 to $4.99		$5.00 to $7.49		$7.50 to $9.99		$10.00 to $19.99		$20.00 to $49.99		$50.00 and above		Total	
	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %
China	4,844	21%	60,155	45%	22,158	62%	6,608	40%	9,069	49%	5,025	97%	1,482	75%	109,340	49%
USA	6,995	53%	80,175	-8%	3,912	-4%	1,530	-20%	2,223	1%	431	16%	48	48%	95,315	-5%
UK	12,462	122%	27,493	3%	3,891	-17%	1,425	0%	1,404	-10%	208	-1%	26	15%	46,909	16%
Canada	1,477	272%	11,984	-12%	10,064	-1%	2,230	-20%	1,625	-9%	89	-5%	9	-54%	27,480	-5%
New Zealand	1,084	649%	8,784	8%	3,023	-2%	785	9%	442	-13%	46	-2%	17	286%	14,183	12%
Netherlands	2,912	940%	4,808	-22%	513	-1%	65	11%	79	23%	10	99%	1	77%	8,388	18%
Hong Kong	17	-67%	2,545	16%	1,483	-15%	741	4%	1,639	11%	820	19%	446	-13%	7,691	4%
Japan	314	61%	5,454	6%	949	4%	472	-13%	363	-14%	76	0%	6	0%	7,634	4%
Germany	3,787	19%	2,282	3%	449	59%	183	-3%	216	34%	30	29%	2	-15%	6,949	15%
Singapore	84	-39%	1,678	12%	766	7%	423	-7%	1,681	0%	591	62%	320	-4%	5,542	7%
Malaysia	80	26%	1,309	6%	1,587	23%	251	-14%	392	-64%	561	150%	157	-26%	4,337	-2%
Ireland	1,184	49%	2,625	-16%	212	-44%	98	4%	25	-34%	7	13%	1	126%	4,152	-6%
Sweden	602	113%	2,577	-1%	468	-26%	280	-10%	74	-35%	9	-37%	1	-32%	4,011	2%
Thailand	153	6%	2,212	72%	340	43%	199	-14%	143	-59%	71	108%	27	-43%	3,146	35%
United Arab Emirat	16	-46%	1,485	-6%	567	90%	192	-15%	288	46%	92	-2%	42	43%	2,682	9%
Denmark	398	263%	1,131	-30%	409	-39%	314	8%	176	3%	37	14%	3	-26%	2,469	-15%
Korea, R	15	-93%	914	70%	715	15%	128	-8%	203	-25%	60	26%	5	-20%	2,041	10%
Finland	192	1258%	986	-3%	385	5%	231	-12%	207	103%	8	-29%	0	-98%	2,009	13%
Philippines	40	246%	1,574	26%	255	37%	46	31%	78	40%	10	8%	4	43%	2,008	29%
Belgium	353	308%	1,045	-5%	285	38%	100	6%	106	12%	16	-21%	1	-62%	1,905	19%
Other	707	30%	9,767	17%	2,275	16%	909	-7%	1,261	13%	276	5%	65	-51%	15,260	14%
Total	37,716	80%	230,984	6%	54,707	17%	17,211	4%	21,693	11%	8,476	63%	2,662	20%	373,449	14%

Bottled exports by colour/ wine style

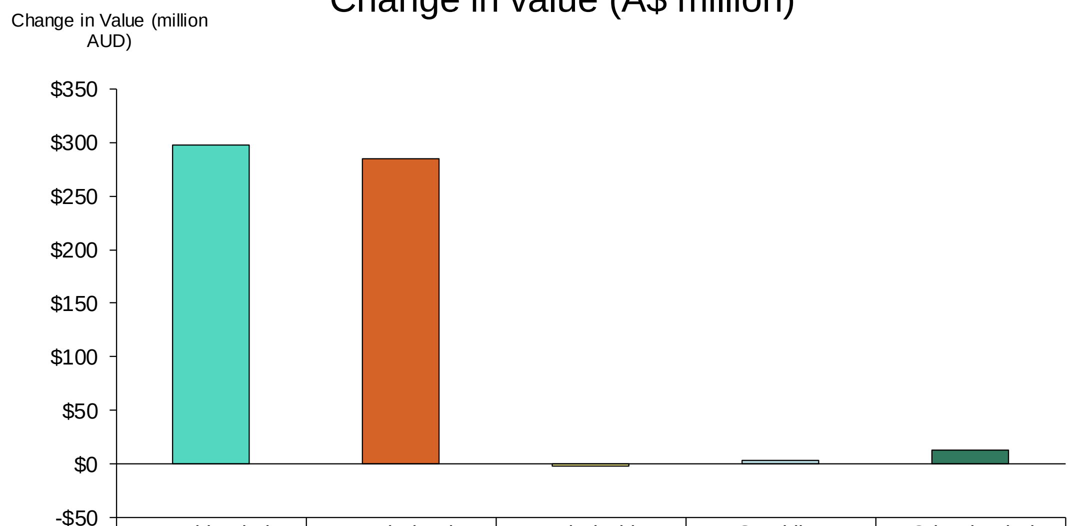
Value

MAT December 2017

Value (A$ million)



Change in value (A$ million)

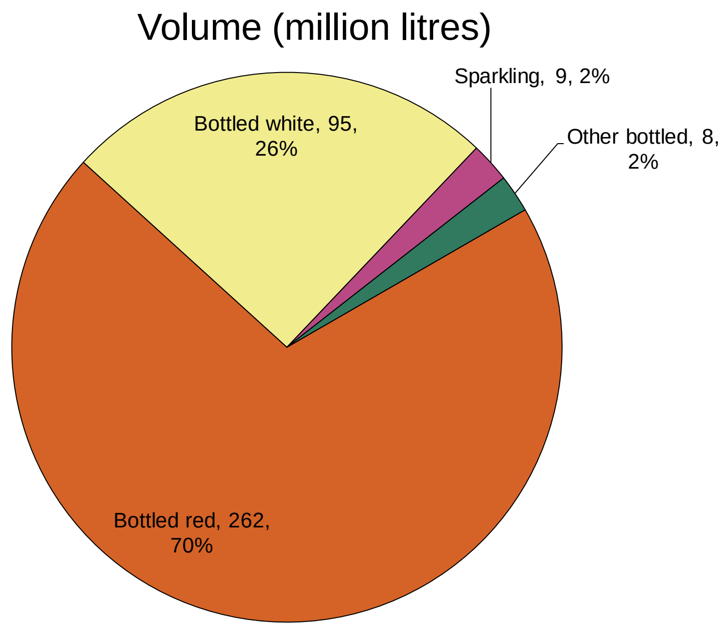


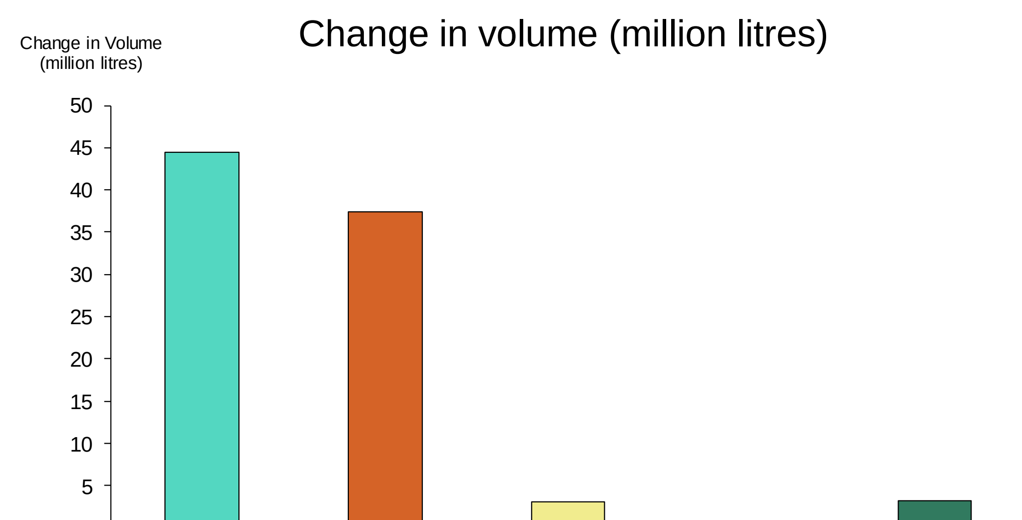
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	16.5%	20.8%	-0.6%	6.9%	52.5%
Vol change	298.3	284.7	-2.3	3.2	12.7

Bottled exports by colour/ wine style

Volume

MAT December 2017





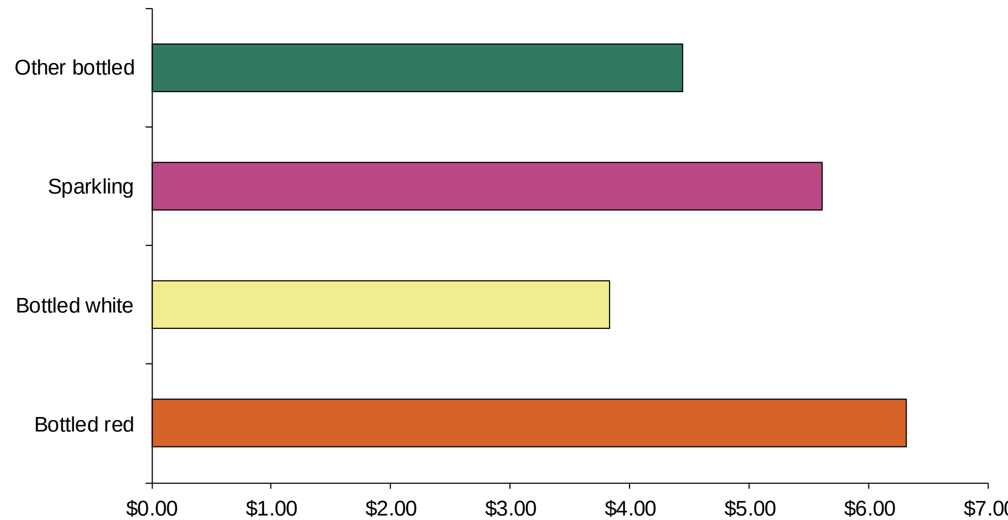
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	13.5%	16.7%	3.3%	9.4%	63.5%
Vol change	44.5	37.4	3.1	0.7	3.2

Bottled exports by colour/ wine style

Average value

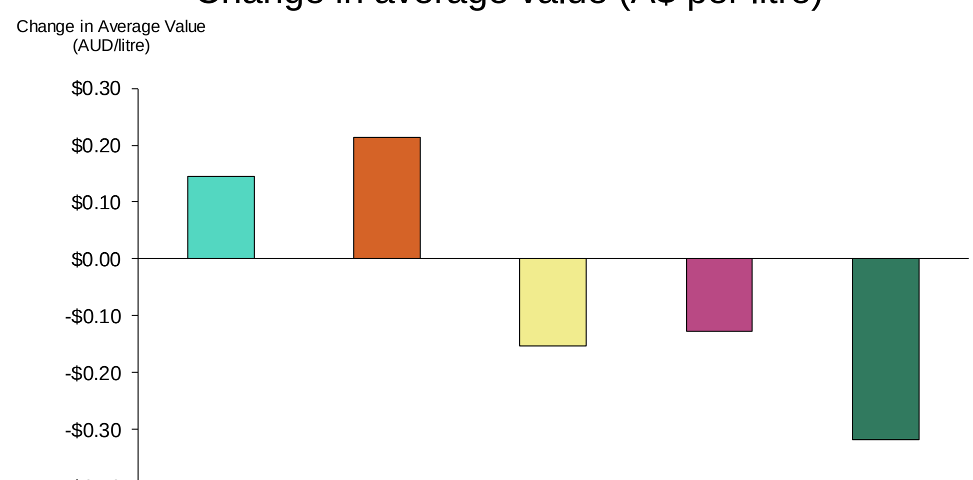
MAT December 2017

Average value (A$ per litre)



	Bottled red	Bottled white	Sparkling	Other bottled
2017	$6.32	$3.83	$5.61	$4.44

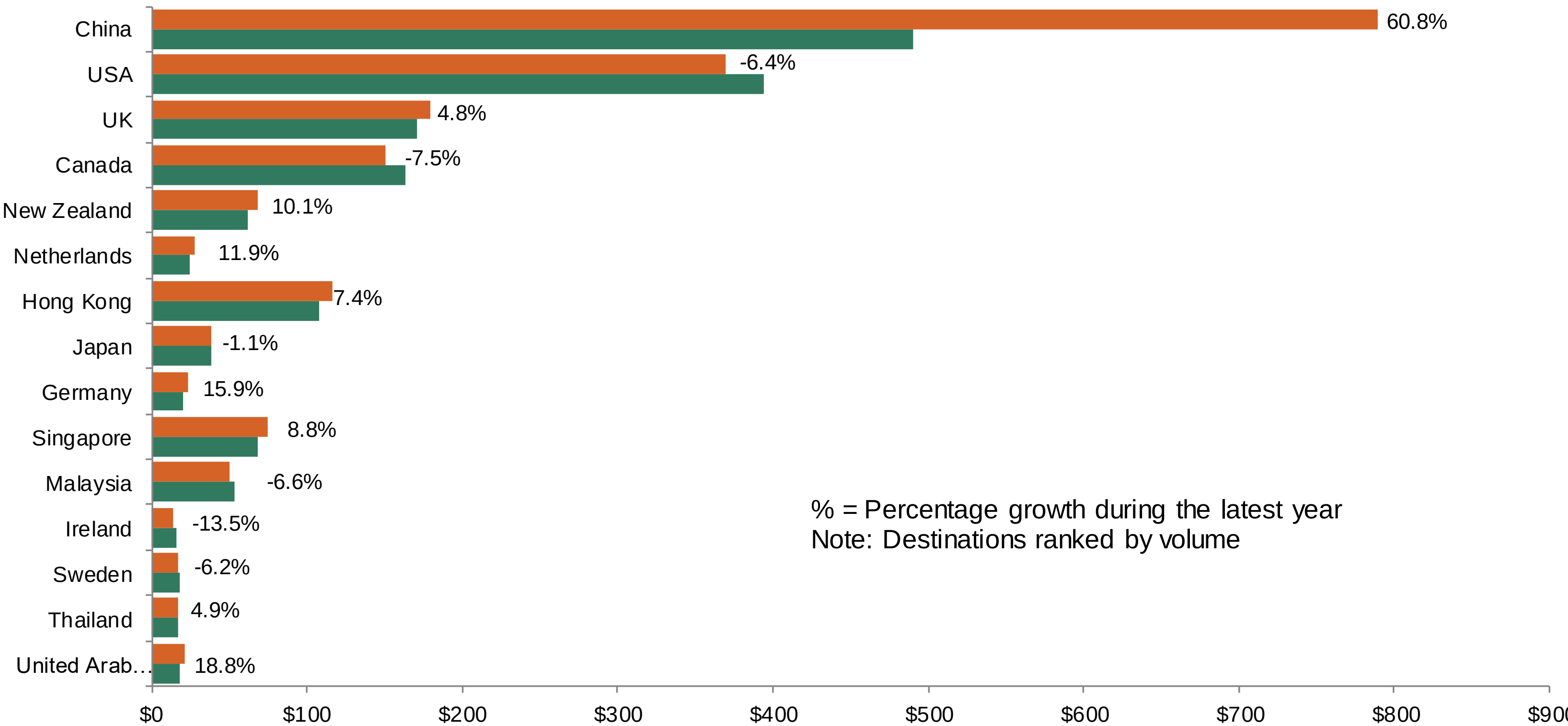
Change in average value (A$ per litre)



	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	2.7%	3.5%	-3.9%	-2.2%	-6.7%
Av. Val change	$0.15	$0.21	-$0.15	-$0.13	-$0.32

Bottled exports by top 15 destinations

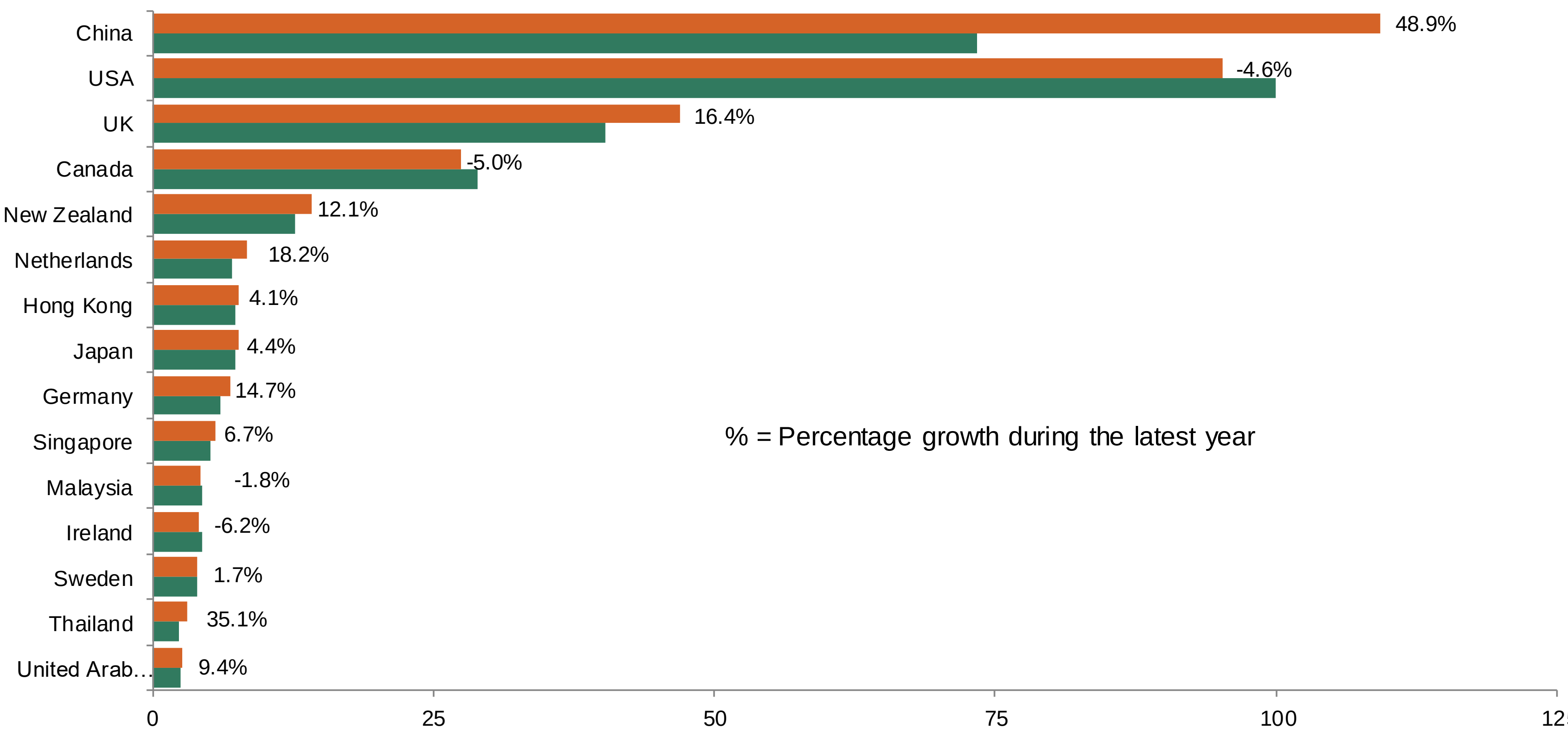
Value (million A$) for MAT December 2017



	United Arab Emirates	Thailand	Sweden	Ireland	Malaysia	Singapore	Germany	Japan	Hong Kong	Netherlands	New Zealand	Canada	UK	USA	China
2017	20.9	17.5	17.2	14.2	50.0	74.7	23.4	37.9	116.3	27.7	68.5	151.1	179.5	369.4	789.3
2016	17.6	16.7	18.3	16.4	53.6	68.7	20.2	38.3	108.3	24.8	62.2	163.3	171.2	394.6	490.8

Bottled exports by top 15 destinations

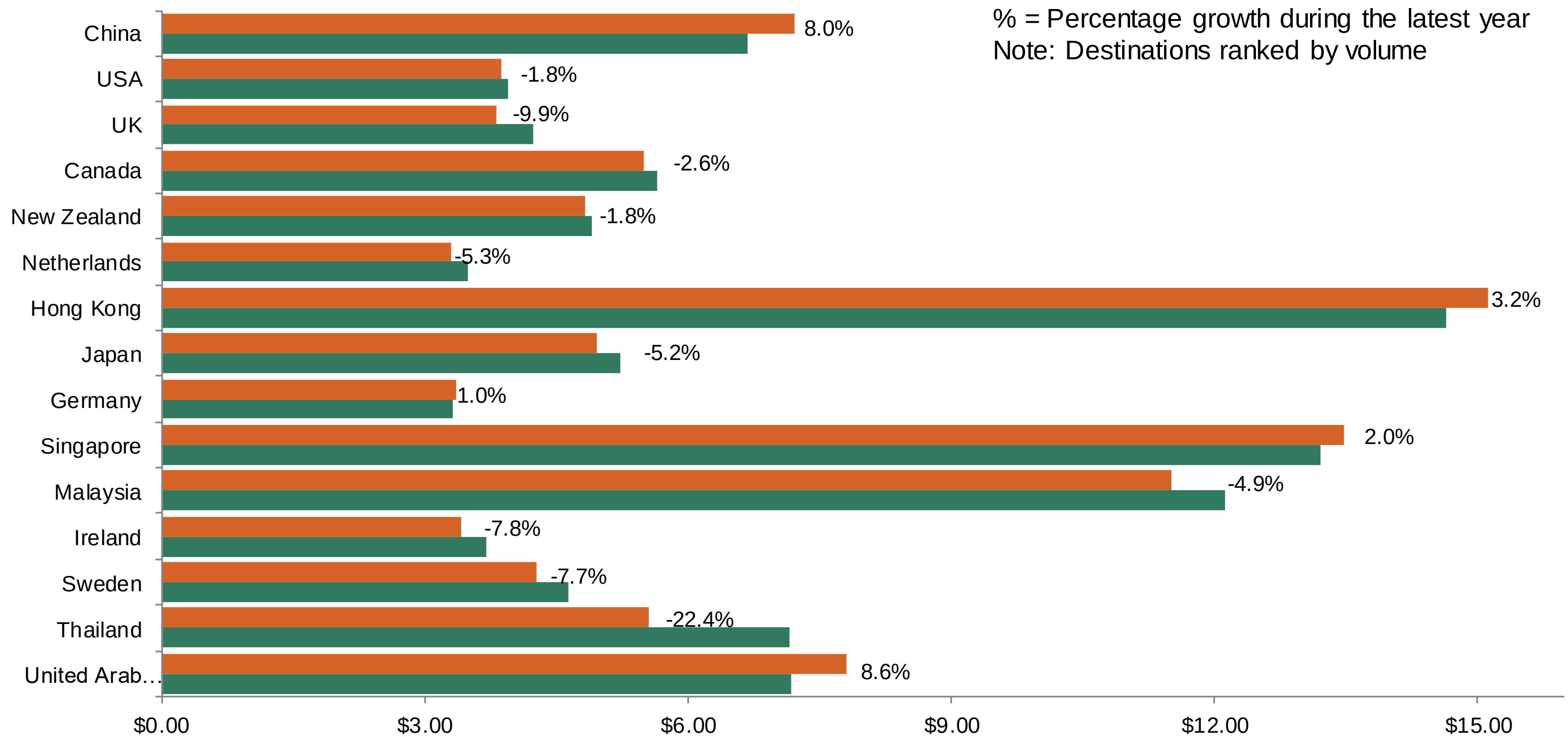
Volume (million litres) for MAT December 2017



	United Arab Emirates	Thailand	Sweden	Ireland	Malaysia	Singapore	Germany	Japan	Hong Kong	Netherlands	New Zealand	Canada	UK	USA	China
2017	2.7	3.1	4.0	4.2	4.3	5.5	6.9	7.6	7.7	8.4	14.2	27.5	46.9	95.3	109.3
2016	2.5	2.3	3.9	4.4	4.4	5.2	6.1	7.3	7.4	7.1	12.7	28.9	40.3	100.0	73.4

Bottled exports by top 15 destinations

Average value (A$ per litre) for MAT December 2017



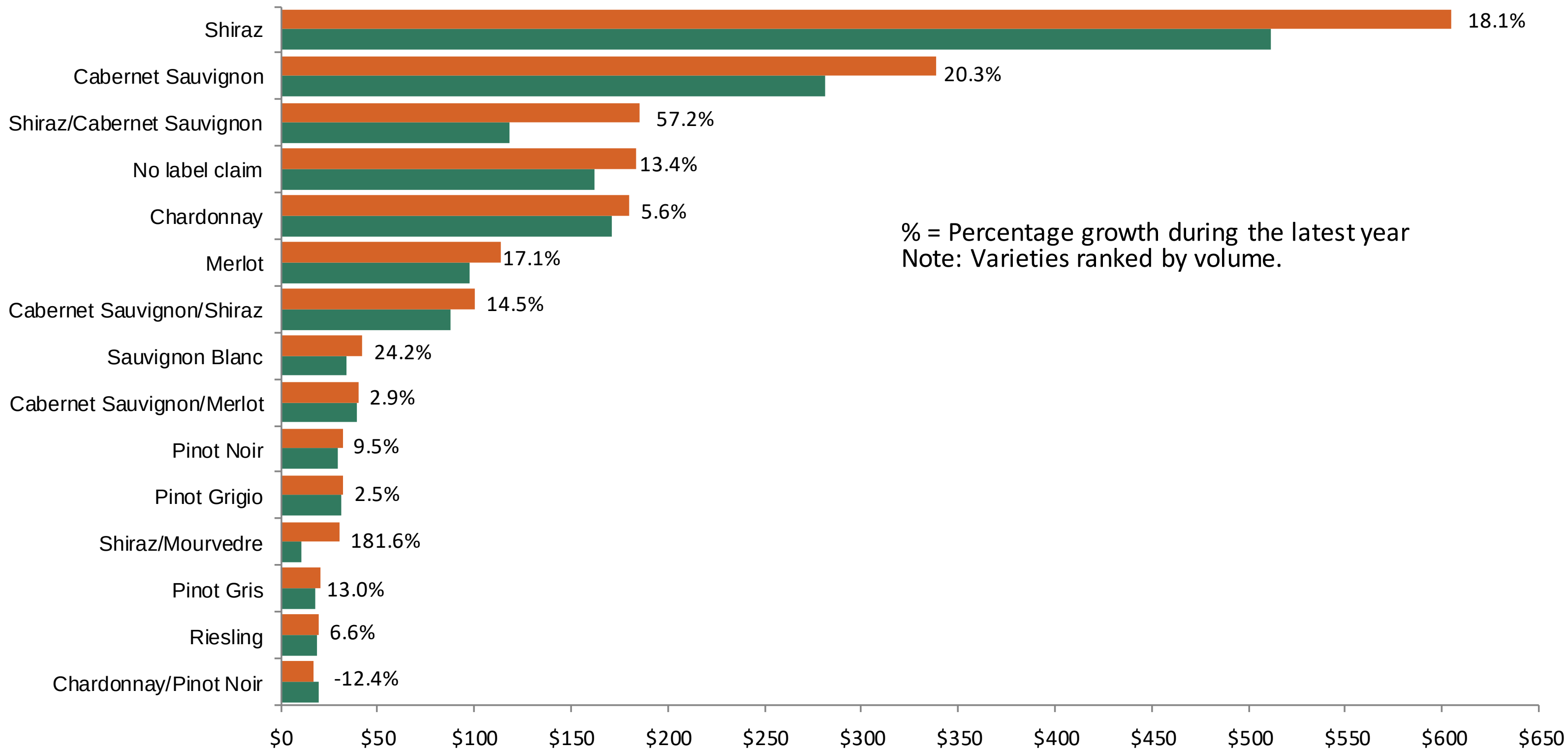
	United Arab Emirates	Thailand	Sweden	Ireland	Malaysia	Singapore	Germany	Japan	Hong Kong	Netherlands	New Zealand	Canada	UK	USA	China
2017	$7.80	$5.56	$4.29	$3.42	$11.53	$13.49	$3.36	$4.96	$15.12	$3.31	$4.83	$5.50	$3.83	$3.88	$7.22
2016	$7.19	$7.17	$4.65	$3.70	$12.12	$13.23	$3.33	$5.24	$14.66	$3.49	$4.92	$5.65	$4.25	$3.95	$6.69

Bottled exports
by top 15 variety label claims
MAT December 2017

Top 15 variety label claims	Volume (million litres)		Value (A$ million FOB)		Average value ($A per litre FOB)	
	2017	Change	2017	Change	2017	Change
Shiraz	88.56	17%	604.64	18%	6.83	1%
Cabernet Sauvignon	52.29	15%	338.29	20%	6.47	4%
Shiraz/Cabernet Sauvignon	33.77	23%	185.86	57%	5.50	27%
No label claim	38.32	26%	184.04	13%	4.80	-10%
Chardonnay	49.61	13%	180.44	6%	3.64	-6%
Merlot	29.32	16%	113.89	17%	3.88	1%
Cabernet Sauvignon/Shiraz	5.09	15%	100.67	14%	19.77	0%
Sauvignon Blanc	12.33	39%	42.47	24%	3.44	-11%
Cabernet Sauvignon/Merlot	8.84	3%	40.29	3%	4.56	0%
Pinot Noir	6.06	8%	32.47	10%	5.36	1%
Pinot Grigio	8.84	5%	31.78	2%	3.60	-3%
Shiraz/Mourvedre	1.59	107%	29.95	182%	18.81	36%
Pinot Gris	6.42	22%	20.40	13%	3.18	-7%
Riesling	3.56	6%	19.50	7%	5.47	1%
Chardonnay/Pinot Noir	3.11	-9%	16.97	-12%	5.45	-4%

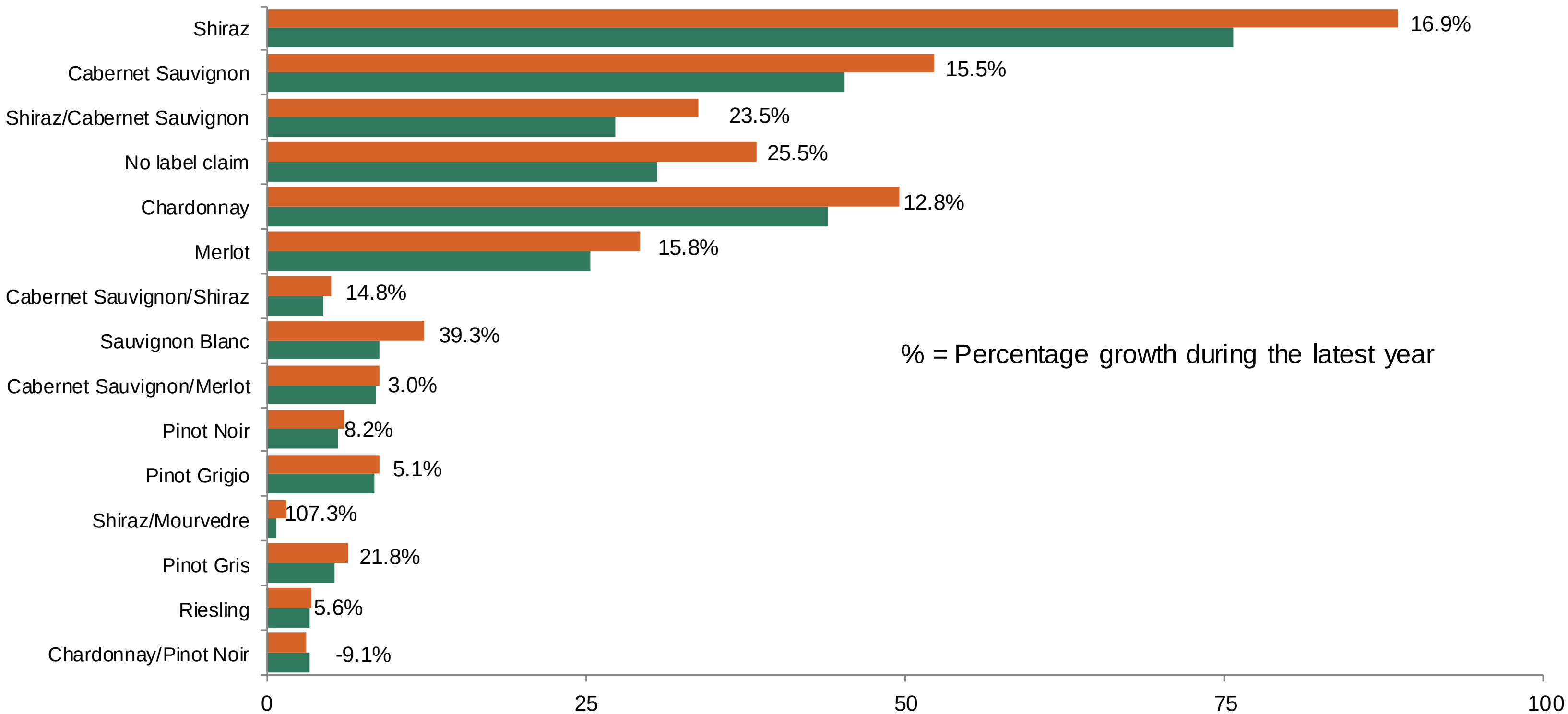
Bottled exports by top 15 variety label claims

Value (million A$) for MAT December 2017



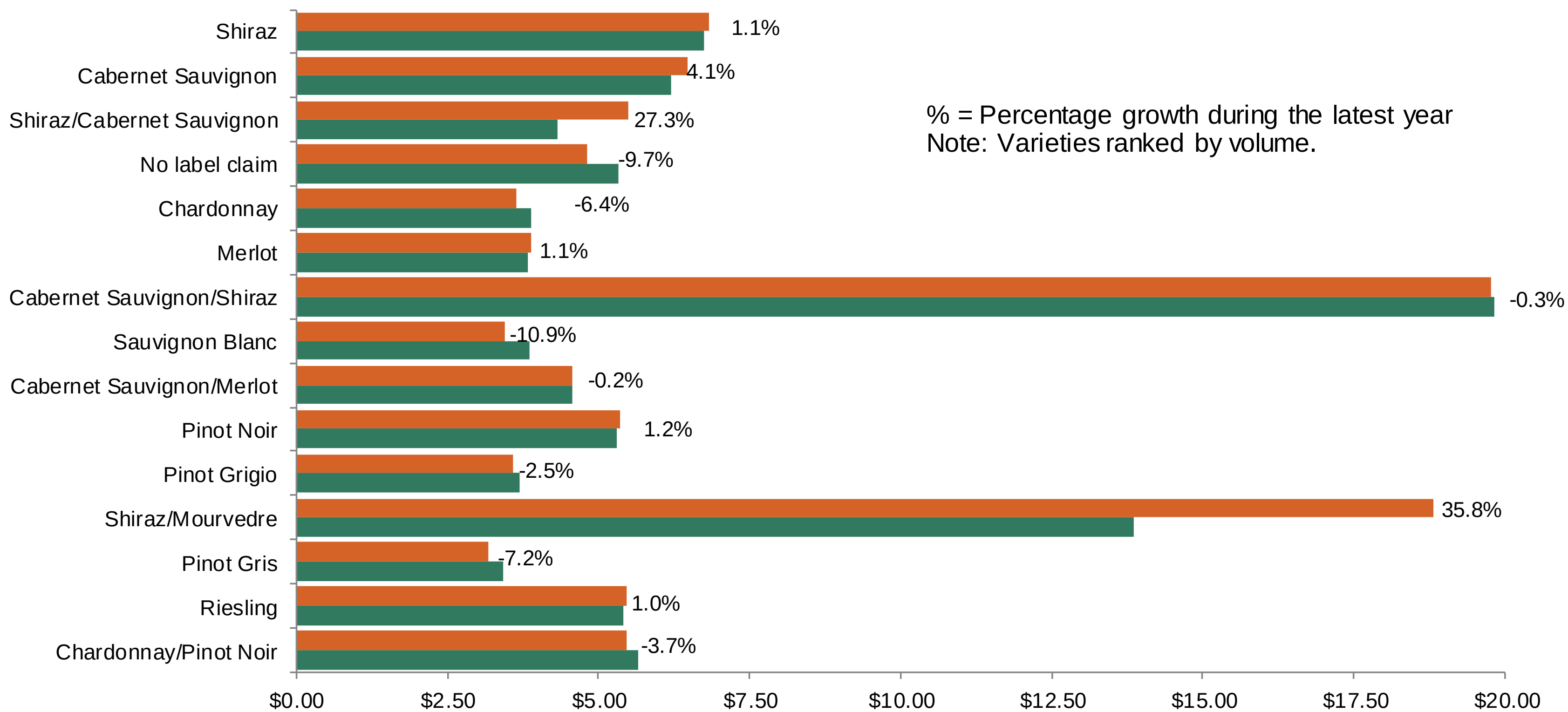
Bottled exports by top 15 variety label claims

Volume (million litres) for MAT December 2017



Bottled exports by top 15 variety label claims

Average Value (A$ per litre) for MAT December 2017



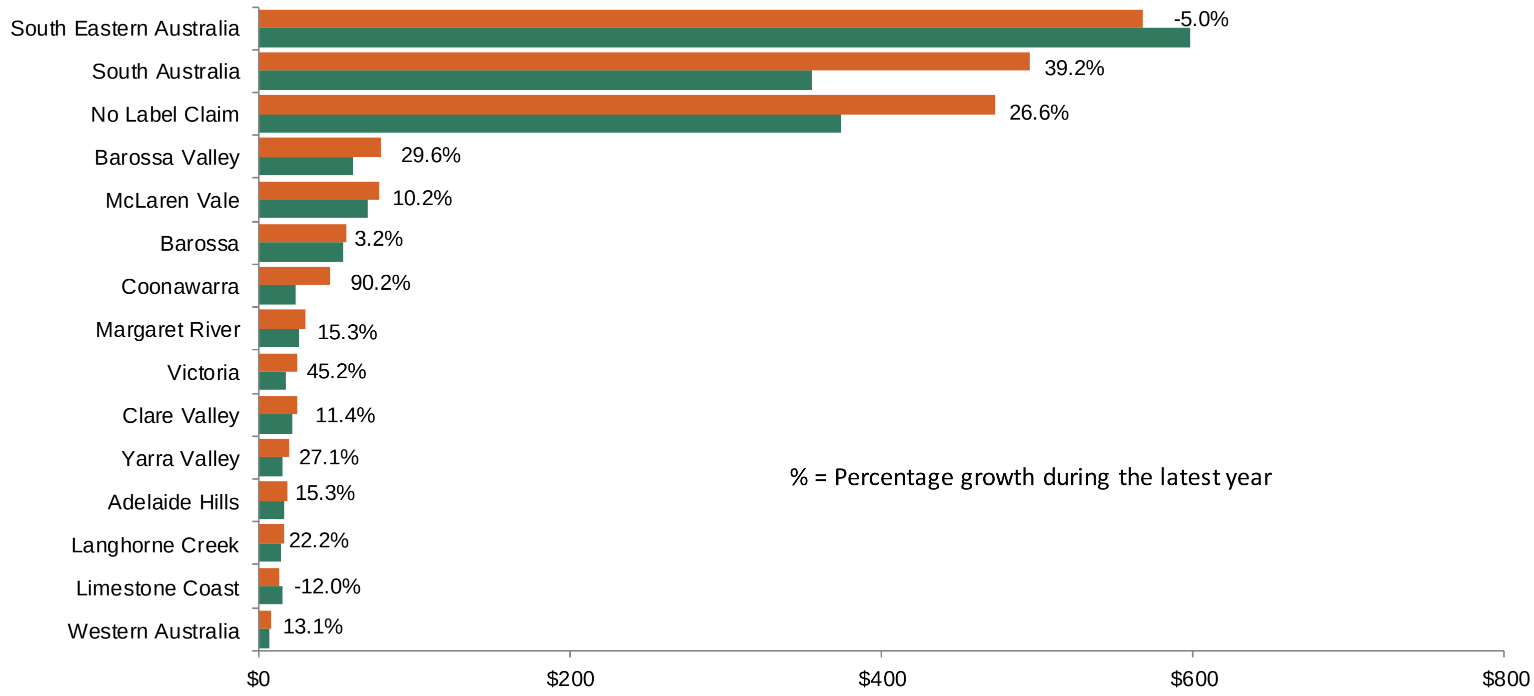
Bottled exports by top 15 GI region label claims

MAT December 2017

Top 15 GI label claims	Volume (million litres)		Value (A$ million FOB)		Average value ($A per litre FOB)	
	2017	Change	2017	Change	2017	Change
South Eastern Australia	165.70	-1%	568.36	-5%	3.43	-4%
South Australia	55.33	28%	495.10	39%	8.95	8%
No Label Claim	93.05	38%	473.61	27%	5.09	-8%
Barossa Valley	4.79	29%	79.04	30%	16.51	1%
McLaren Vale	6.93	8%	77.10	10%	11.12	2%
Barossa	5.24	0%	56.52	3%	10.78	3%
Coonawarra	3.45	39%	45.61	90%	13.22	37%
Margaret River	2.47	12%	30.16	15%	12.19	3%
Victoria	4.01	49%	24.69	45%	6.16	-3%
Clare Valley	2.95	26%	24.67	11%	8.35	-12%
Yarra Valley	1.42	16%	19.58	27%	13.80	10%
Adelaide Hills	2.04	17%	18.63	15%	9.14	-1%
Langhorne Creek	2.05	24%	16.87	22%	8.24	-2%
Limestone Coast	2.41	2%	13.61	-12%	5.65	-14%
Western Australia	1.24	6%	8.20	13%	6.63	7%

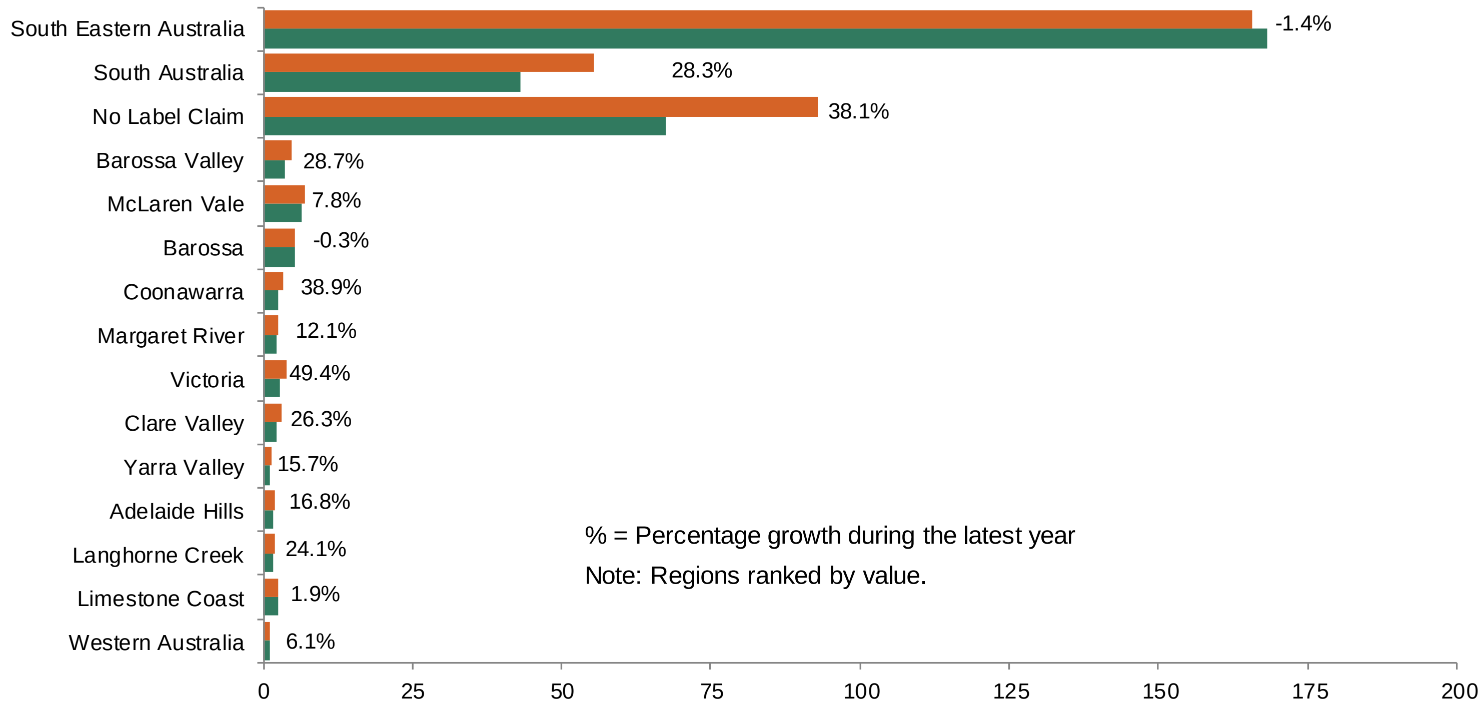
Bottled exports by top 15 GI region label claims

Value (million A$) for MAT December 2017



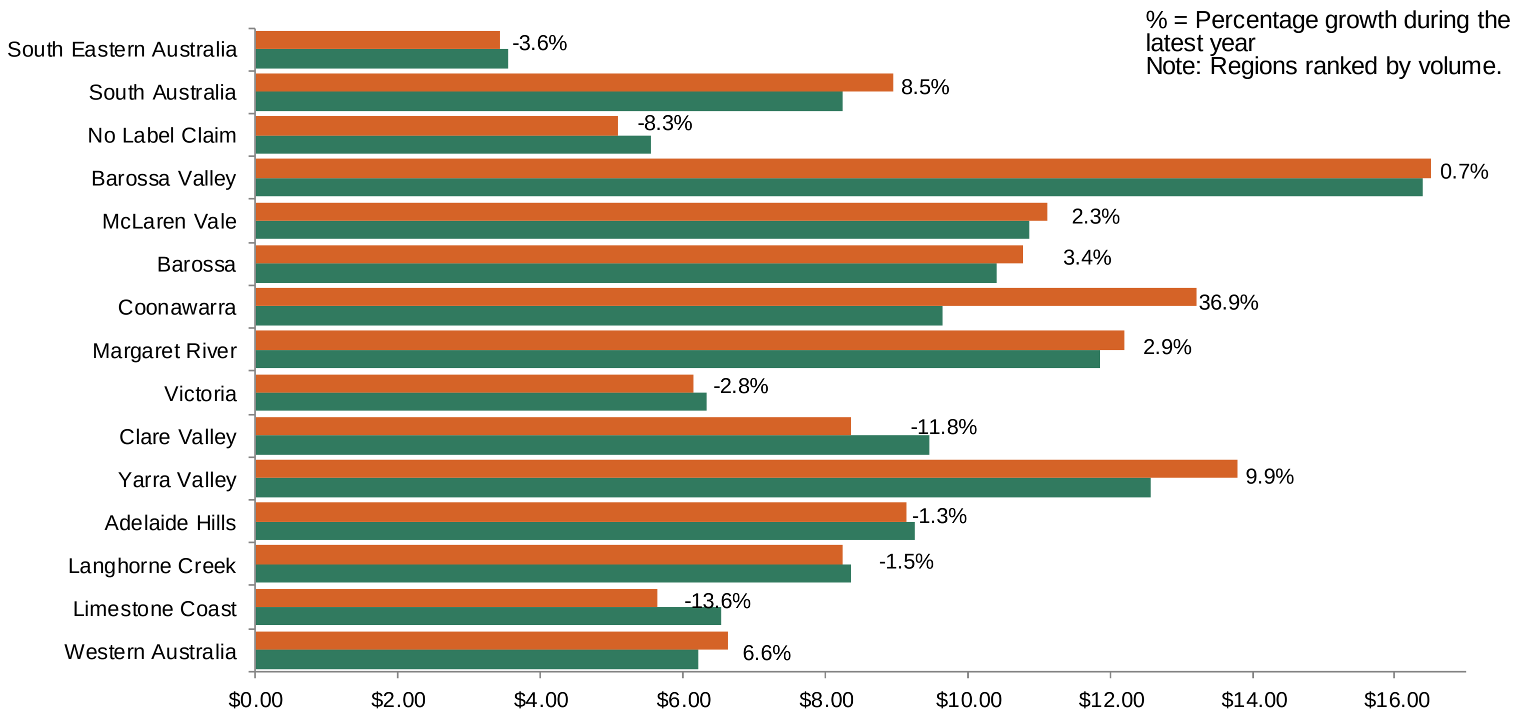
Bottled exports by top 15 GI region label claims

Volume (million litres) for MAT December 2017



Bottled exports by top 15 GI region label claims

Average Value (A$ per litre) for MAT December 2017

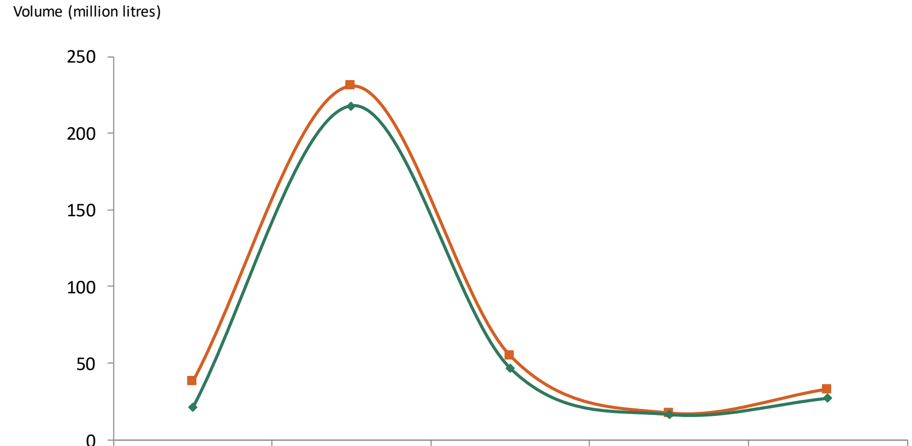


Bottled exports by price point

Volume

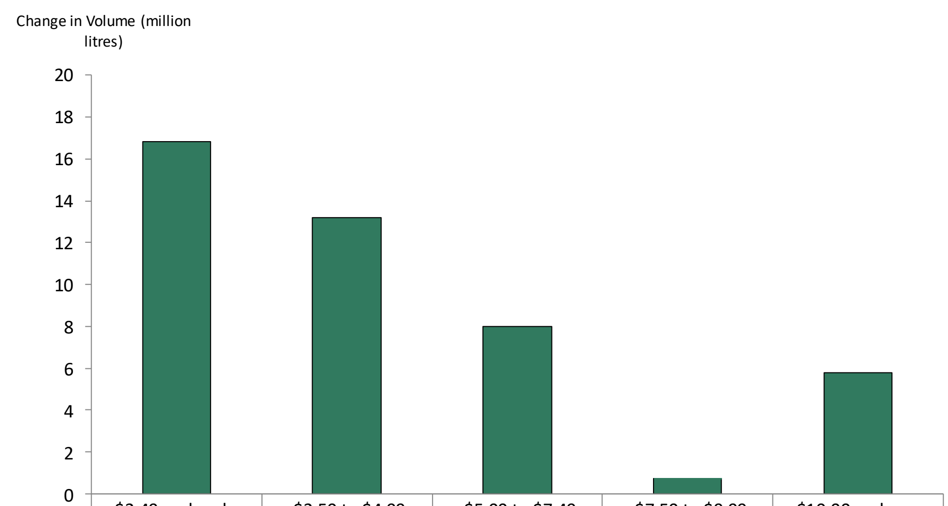
MAT December 2017

Volume (million litres)



	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10.00 and over
2017	38	231	55	17	33
2016	21	218	47	16	27

Change in volume (million litres)



	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10.00 and over
% change	80.4%	6.1%	17.1%	4.3%	21.5%
Vol change	16.8	13.2	8.0	0.7	5.8

Bulk wine exports report

Bulk wine exports by price point and destination

Value ('000 A$) for MAT December 2017

	$0.50 and under		$0.50 to $1.00		$1.00 to $1.50		$1.50 to $2.00		$2.00 to $2.50		$2.50 and above		Total	
	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %	MAT December 2017 ('000 AUD)	Change %
UK	70	-87%	92,164	-5%	59,292	27%	6,265	-70%	3,654	-67%	7,158	-6%	168,603	-8%
USA	-	na	42,477	70%	26,427	-10%	5,951	66%	572	-60%	3,424	-11%	78,851	24%
China	-	na	4,579	-71%	39,311	1107%	3,762	99%	5,853	128%	4,642	-15%	58,147	100%
Germany	-	na	19,481	3%	10,455	105%	159	-83%	725	250%	3,101	3385%	33,921	35%
Canada	-	na	19,066	0%	13,554	52%	284	137%	119	560%	168	146%	33,191	18%
New Zealand	71	na	6,403	-11%	4,732	-9%	421	-37%	169	56%	1,607	265%	13,403	-1%
Netherlands	19	na	5,190	20%	3,266	54%	39	6%	-	na	24	na	8,538	32%
Italy	-	-100%	395	39%	7,125	-47%	316	-5%	-	na	37	na	7,874	-44%
Denmark	5	na	4,159	-31%	2,161	459%	719	-35%	271	3%	266	-1%	7,581	-6%
Belgium	-	na	4,629	8%	1,771	-3%	324	25%	48	na	-	na	6,772	6%
Finland	-	na	2,439	8%	2,574	4%	448	212%	-	na	531	6%	5,992	12%
France	-	na	1,616	-46%	2,426	243%	358	27%	51	na	168	-28%	4,620	9%
Sweden	-	na	244	-53%	724	39%	854	-23%	2,099	75%	193	-41%	4,114	12%
Japan	-	na	1,680	40%	1,387	374%	605	126%	224	-48%	163	-67%	4,060	51%
Switzerland	-	na	389	-29%	506	89%	73	-1%	101	5%	65	-50%	1,134	2%
Thailand	-	na	271	-15%	745	156%	-	na	26	na	-	na	1,043	70%
Norway	-	na	24	-96%	909	158%	-	na	-	na	-	na	933	4%
Spain	-	na	157	-36%	440	15%	-	na	-	na	-	na	597	-5%
Other	-	-100%	219	-45%	357	-23%	197	-39%	-	na	100	-94%	873	-69%
Total	166	-71%	205,582	-1%	178,161	46%	20,777	-36%	13,913	-20%	21,647	3%	440,246	10%

Bulk wine exports by price point and destination

Volume ('000 litres) for MAT December 2017

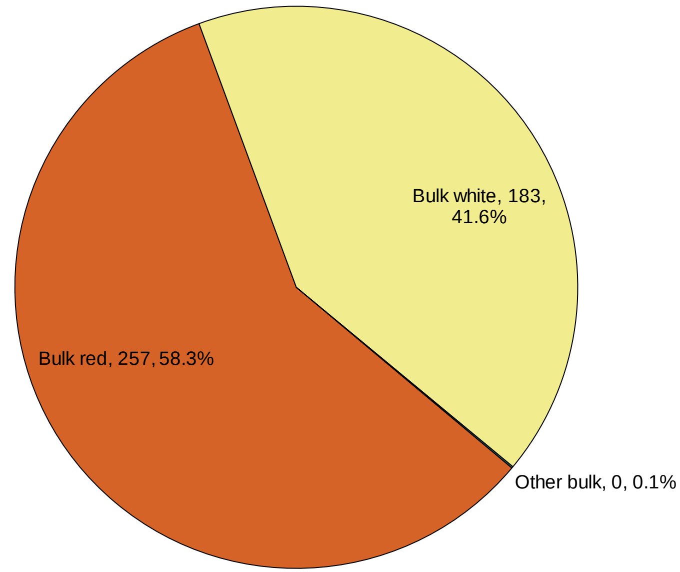
	$0.50 and under		$0.50 to $1.00		$1.00 to $1.50		$1.50 to $2.00		$2.00 to $2.50		$2.50 and above		Total	
	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %	MAT December 2017 ('000 Litres)	Change %
UK	200	-84%	116,948	-12%	52,050	26%	3,611	-70%	1,665	-67%	2,009	-26%	176,483	-10%
USA	-	na	49,793	59%	21,950	-11%	3,601	72%	240	-61%	950	-10%	76,534	28%
China	-	na	5,010	-73%	31,988	1054%	2,208	102%	2,544	126%	1,363	-5%	43,114	70%
Canada	-	na	21,759	-6%	12,232	42%	166	108%	57	533%	24	0%	34,237	7%
Germany	-	na	22,949	-6%	9,005	94%	96	-82%	360	275%	984	4000%	33,394	12%
New Zealand	252	na	9,666	-15%	4,065	-6%	264	-35%	72	50%	348	173%	14,667	-10%
Netherlands	48	na	6,262	14%	2,875	50%	24	0%	-	na	3	na	9,212	24%
Denmark	24	na	5,253	-36%	2,079	567%	415	-36%	120	0%	72	16%	7,963	-15%
Belgium	-	na	5,623	7%	1,586	-5%	193	27%	24	na	-	na	7,427	4%
Italy	-	-100%	405	42%	6,215	-47%	192	-6%	-	na	14	na	6,825	-45%
Finland	-	na	2,527	3%	2,164	-4%	247	229%	-	na	148	14%	5,086	3%
France	-	na	1,923	-48%	2,140	237%	194	18%	26	na	38	-41%	4,321	-5%
Japan	-	na	1,864	29%	1,190	344%	350	126%	112	-48%	48	-67%	3,565	60%
Sweden	-	na	262	-54%	594	36%	503	-19%	1,018	77%	41	-46%	2,418	6%
Switzerland	-	na	456	-35%	408	89%	48	1%	48	0%	24	-50%	984	-7%
Thailand	-	na	287	-14%	576	167%	-	na	12	na	-	na	875	59%
Norway	-	na	24	-96%	814	161%	-	na	-	na	-	na	838	-6%
Spain	-	na	168	-46%	384	14%	-	na	-	na	-	na	553	-15%
Other	-	-100%	240	-50%	270	-30%	120	-38%	-	na	28	-90%	658	-52%
Total	523	-62%	251,419	-8%	152,586	42%	12,232	-34%	6,298	-20%	6,093	-1%	429,152	4%

Bulk exports by colour/ wine style

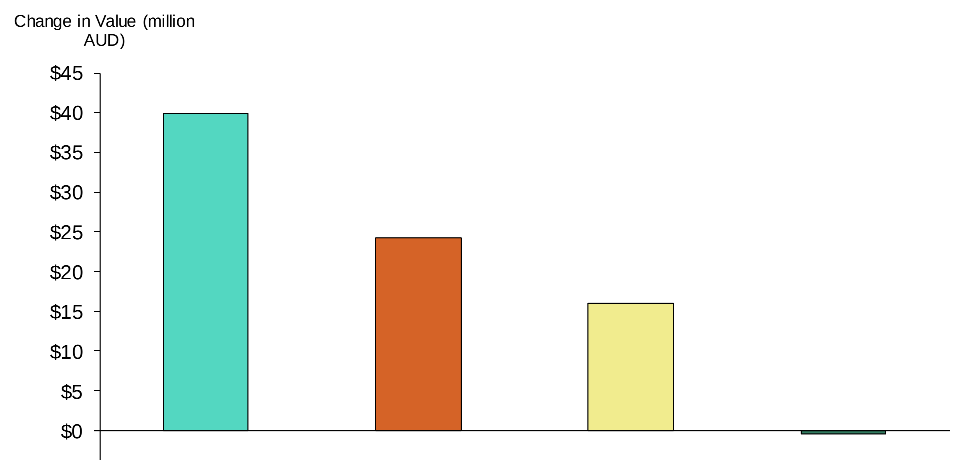
Value

MAT December 2017

Value (A$ million)



Change in Value (A$ million)



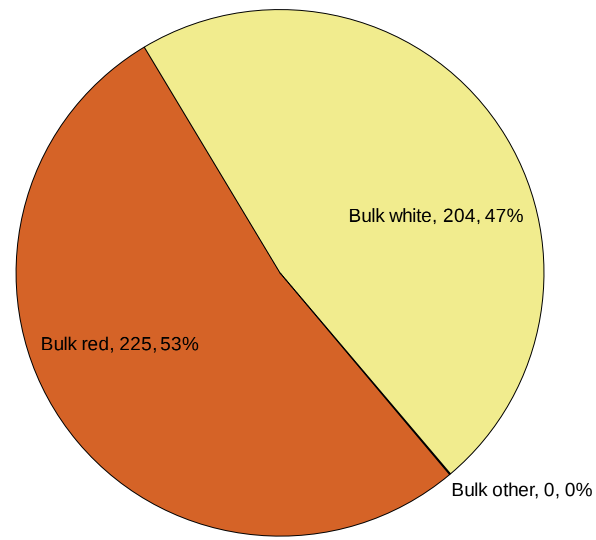
	Total Bulk	Bulk red	Bulk white	Other bulk
% change	10.0%	10.4%	9.6%	-49.6%
Val change	39.9	24.2	16.1	-0.4

Bulk exports by colour/ wine style

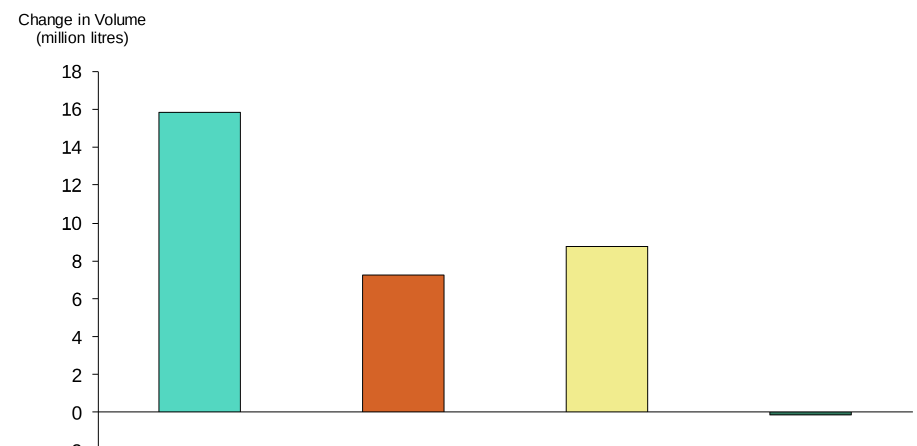
Volume

MAT December 2017

Volume (million litres)



Change in Volume (million litres)



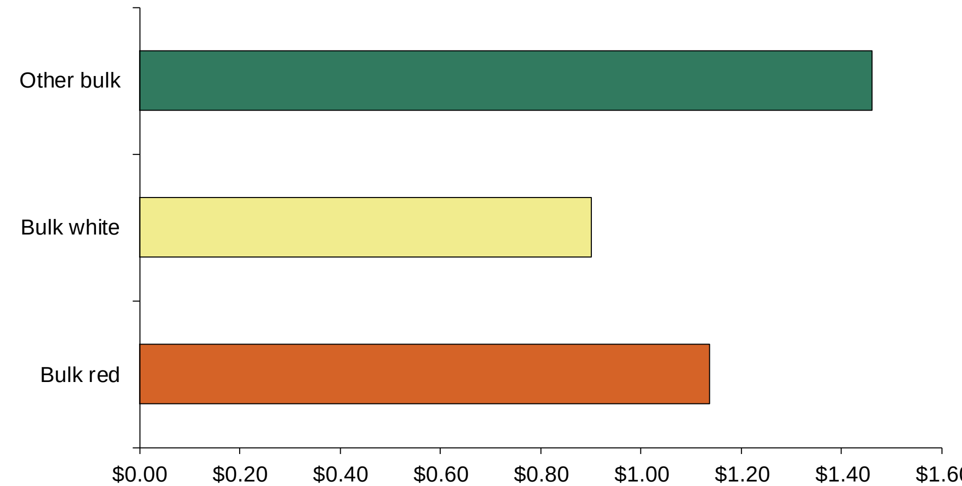
	Total Bulk	Bulk red	Bulk white	Bulk other
% change	4%	3%	4%	-32%
Vol change	15.9	7.2	8.8	-0.1

Bulk exports by colour/ wine style

Average value

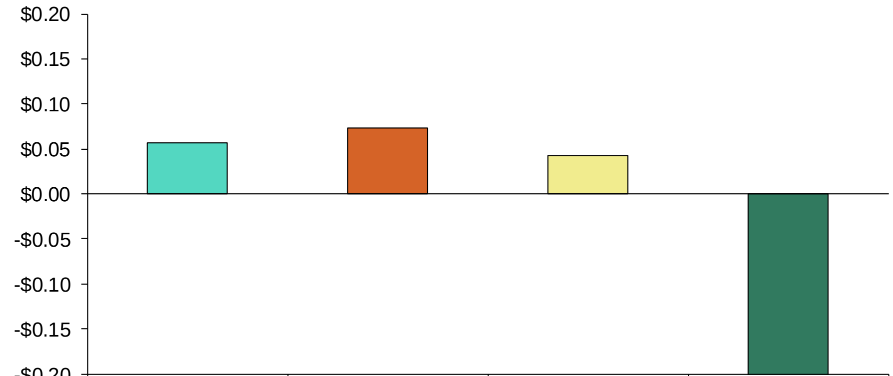
MAT December 2017

Average value (A$ per litre)



	Bulk red	Bulk white	Other bulk
2017	$1.14	$0.90	$1.46

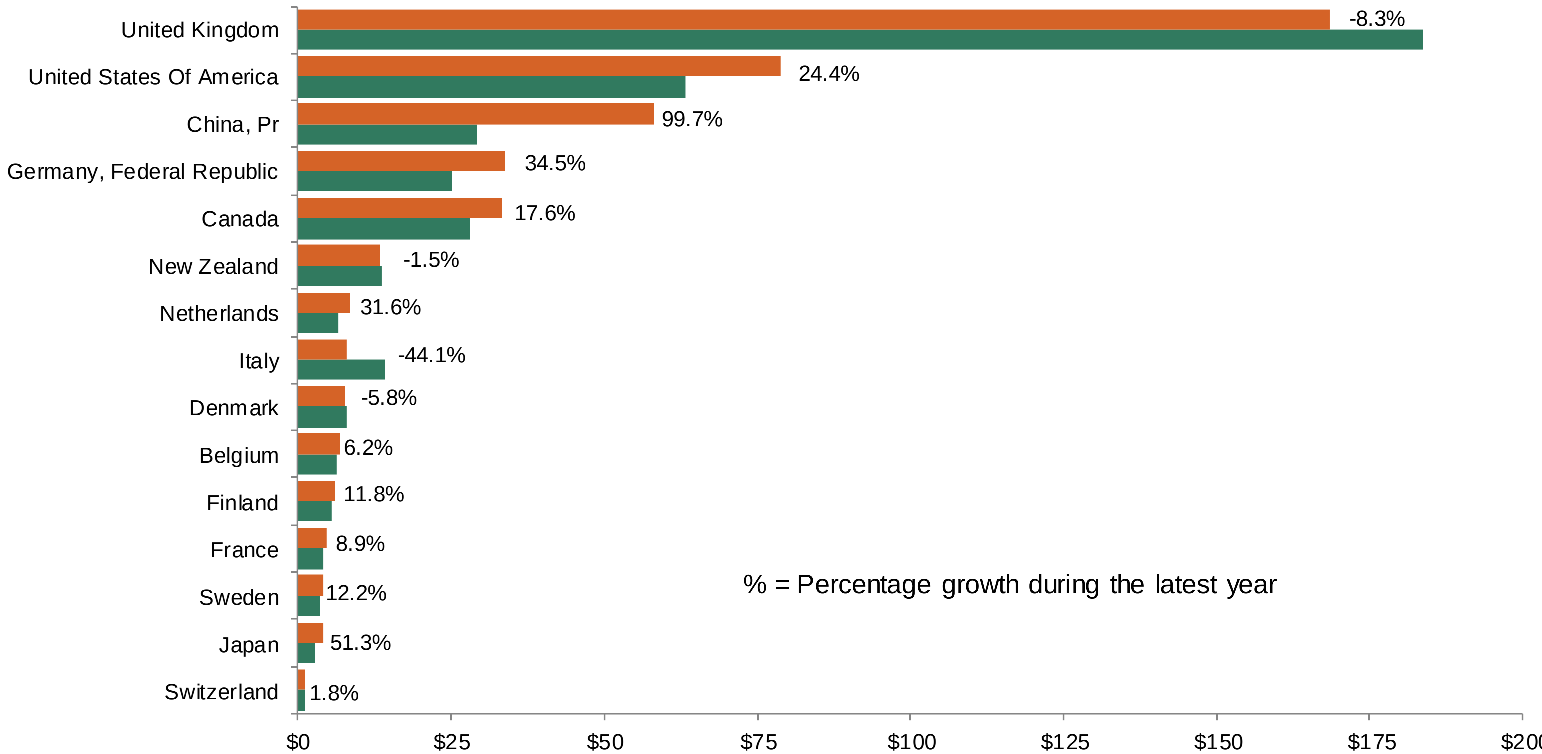
Change in average value (A$ per litre)



	Total Bulk	Bulk red	Bulk white	Other bulk
% change	5.9%	6.9%	4.9%	-25.6%
Av. Val change	$0.06	$0.07	$0.04	-$0.50

Bulk exports by top 15 destinations

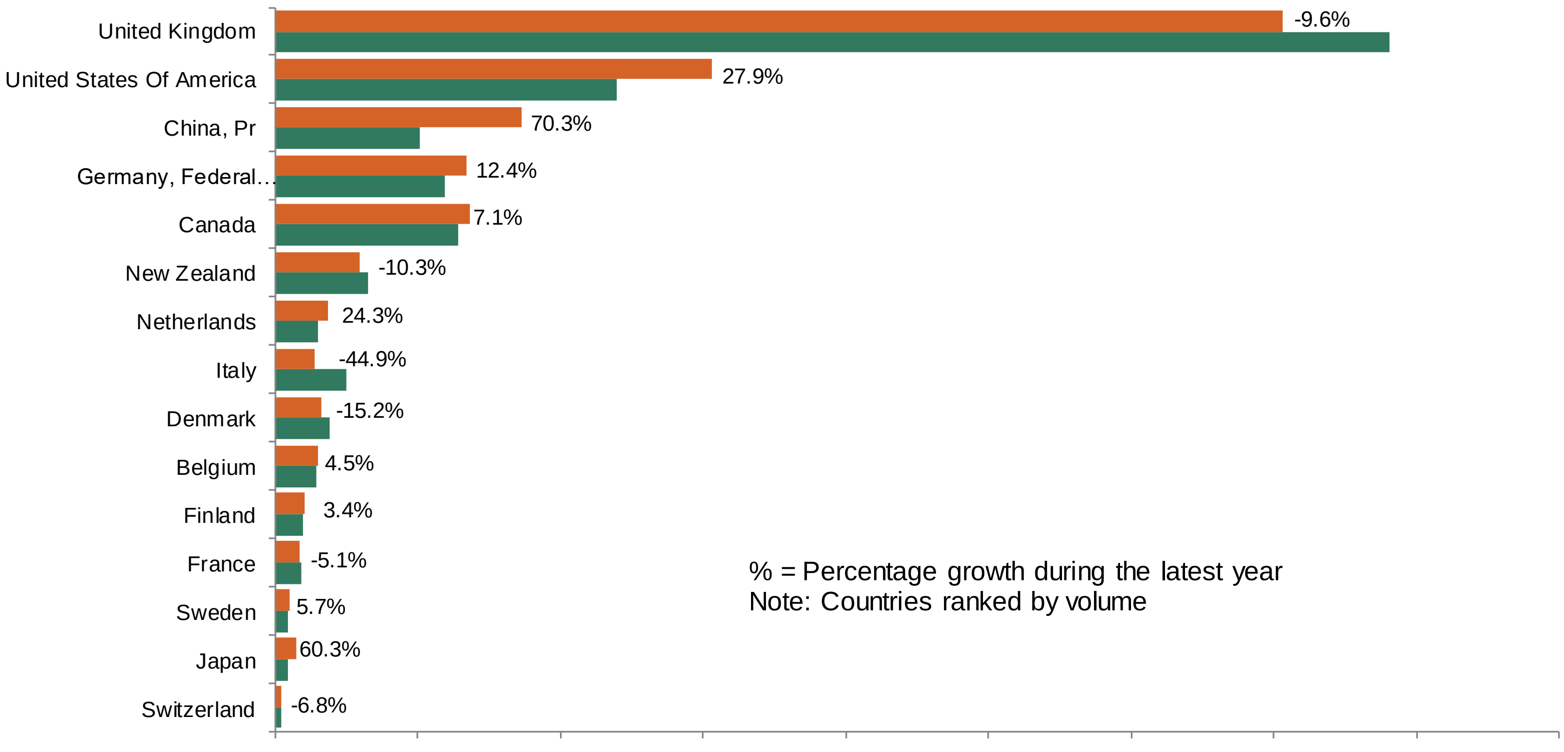
Value (million A$) for MAT December 2017



	Switzerland	Japan	Sweden	France	Finland	Belgium	Denmark	Italy	Netherlands	New Zealand	Canada	Germany, Federal Republic	China, Pr	United States Of America	United Kingdom
2017	1.1	4.1	4.1	4.6	6.0	6.8	7.6	7.9	8.5	13.4	33.2	33.9	58.1	78.9	168.6
2016	1.1	2.7	3.7	4.2	5.4	6.4	8.0	14.1	6.5	13.6	28.2	25.2	29.1	63.4	183.8

Bulk exports by top 15 destinations

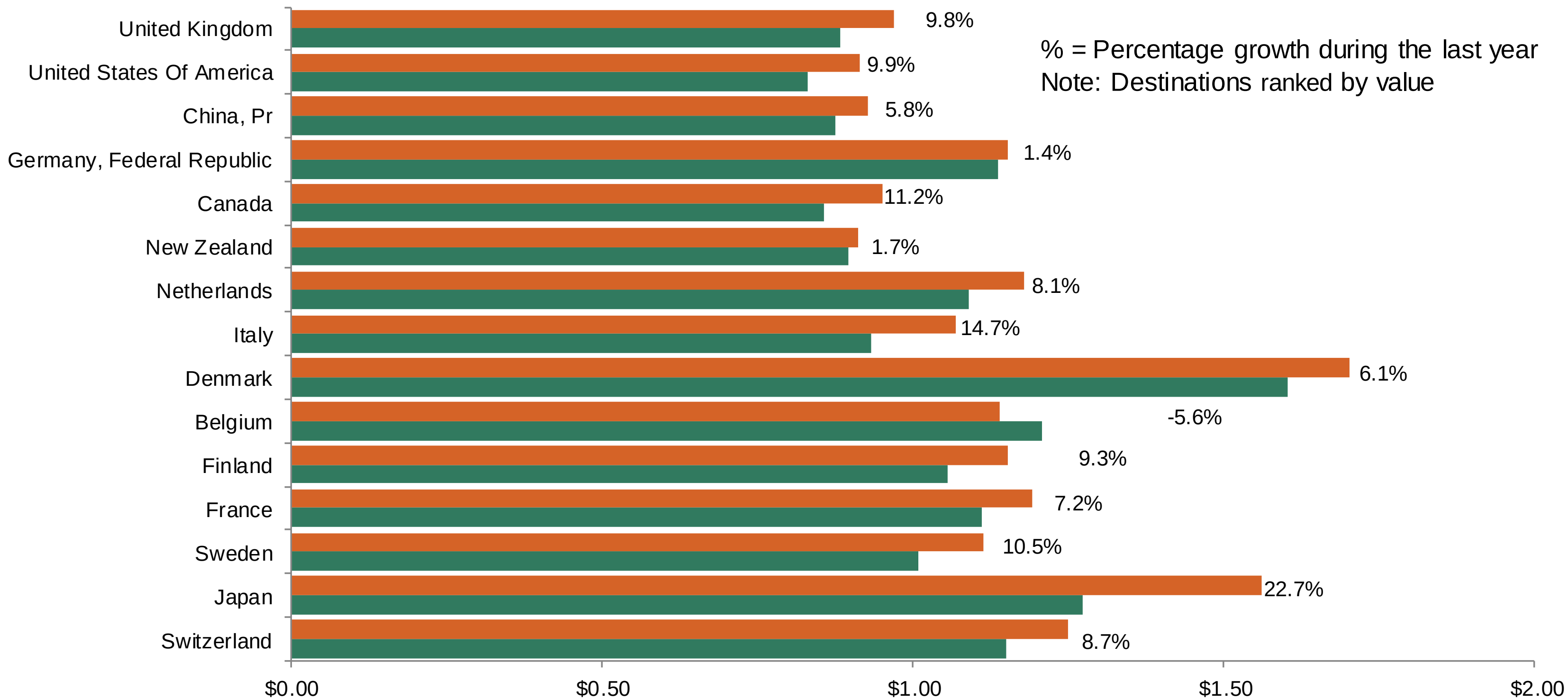
Volume (million litres) for MAT December 2017



	Switzerland	Japan	Sweden	France	Finland	Belgium	Denmark	Italy	Netherlands	New Zealand	Canada	Germany, Federal Republic	China, Pr	United States Of America	United Kingdom
2017	1.0	3.6	2.4	4.3	5.1	7.4	8.0	6.8	9.2	14.7	34.2	33.4	43.1	76.5	176.5
2016	1.1	2.2	2.3	4.6	4.9	7.1	9.4	12.4	7.4	16.4	32.0	29.7	25.3	59.8	195.3

Bulk exports by top 15 destinations

Average Value (A$ per litre) for MAT December 2017



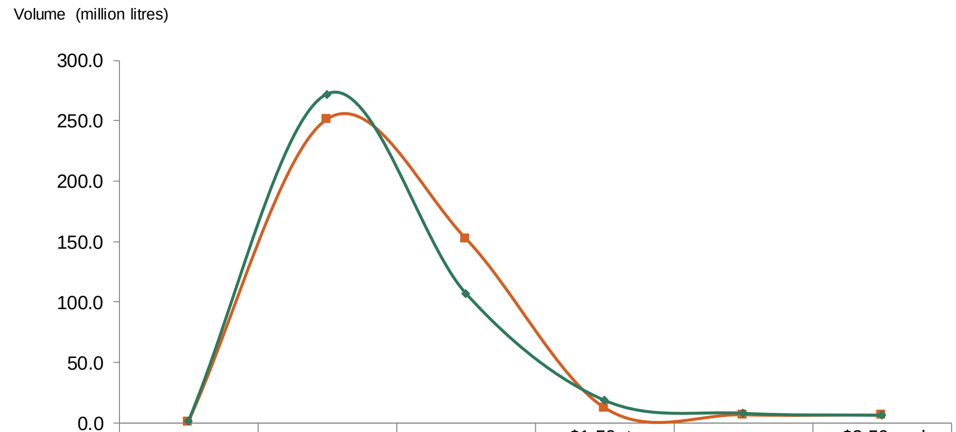
	Switzerland	Japan	Sweden	France	Finland	Belgium	Denmark	Italy	Netherlands	New Zealand	Canada	Germany, Federal Republic	China, Pr	United States Of America	United Kingdom
2017	$1.25	$1.56	$1.11	$1.19	$1.15	$1.14	$1.70	$1.07	$1.18	$0.91	$0.95	$1.15	$0.93	$0.91	$0.97
2016	$1.15	$1.27	$1.01	$1.11	$1.06	$1.21	$1.60	$0.93	$1.09	$0.90	$0.86	$1.14	$0.88	$0.83	$0.88

Bulk exports by price point

Volume

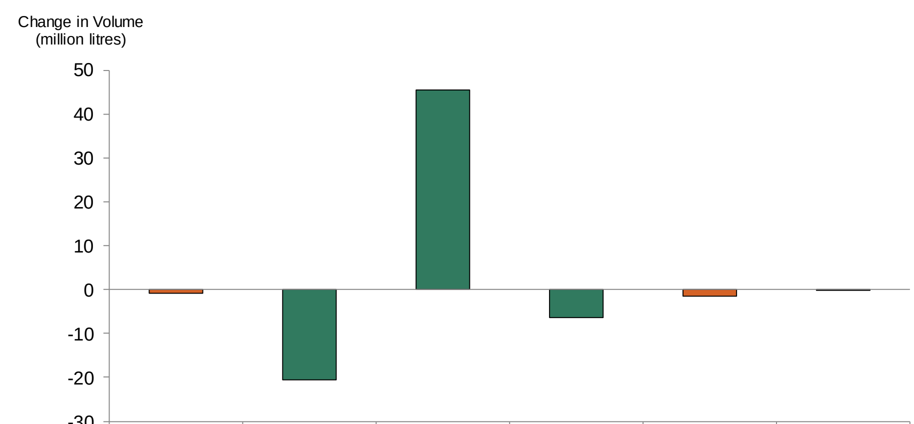
MAT December 2017

Volume (million litres)



	$0.00 to $0.49	$0.50 to $0.99	$1.00 to $1.49	$1.50 to $1.99	$2.00 to $2.49	$2.50 and above
2017	0.5	251.4	152.6	12.2	6.3	6.1
2016	1	272	107	19	8	6

Change in Volume (million litres)



	$0.00 to $0.49	$0.50 to $0.99	$1.00 to $1.49	$1.50 to $1.99	$2.00 to $2.49	$2.50 and above
% change	-62.3%	-7.6%	42.3%	-34.5%	-20.1%	-1.2%
Vol change	-0.9	-20.6	45.4	-6.4	-1.6	-0.1

Notes & Definitions

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.

- **Export Approvals**: Wine approved by the 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 A$ 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 the Wine Australia and ABS in the method of converting the value of exports denominated in foreign currency to A$. In the case of 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 the Wine Australia and 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 ending with the nominated month.

- **% Change** : Is calculated as the percentage change in the MAT for the immediate past 13 months compared to the preceding 13 months.

- **Formula**: % Change = ((current MAT - preceding MAT)/preceding MAT) x 100

- **A$**: 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.

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 of size ranging 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.

Wine Australia providing insights on Australian Wine

Export Report