

Wine
Australia
providing
insights on
Australian
Wine

Export Report
Moving Annual Total (MAT)
To December 2019

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Summary Report

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Executive summary

- Exceptional growth in premium and fine wine saw value grow to \$2.91 billion despite the decline in volume
- Exports of \$10 per litre or more FOB reached a record value of \$1.1 billion
- Total value was the second highest on record for a calendar year
- Two consecutive lower Australian vintages contributed to the volume decline, and
- Asia is the export growth centre.

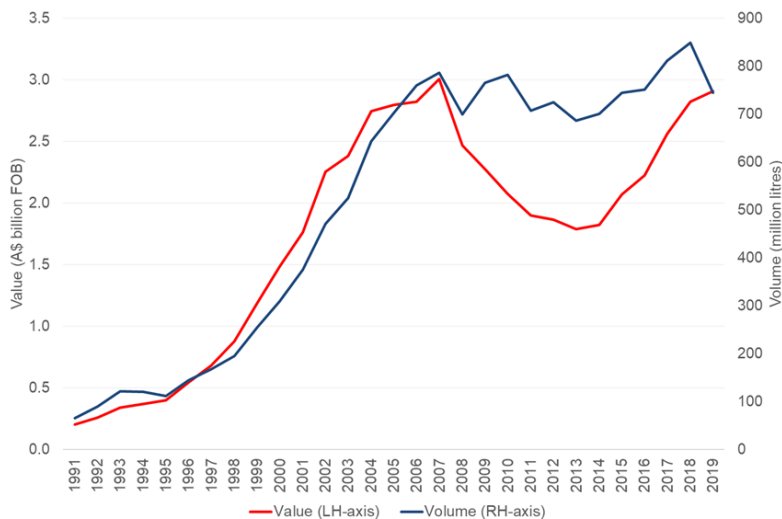
Commentary

Overview

In the year ended December 2019, the value of Australian wine exports increased by 3 per cent to \$2.91 billion and volume decreased by 12 per cent to 744 million litres (83 million 9-litre case equivalents). The average value of exported wine increased by 18 per cent to \$3.91 per litre FOB, the highest level since 2006.

Value increased for the sixth consecutive year and was the second highest on record for a calendar year (see Figure 1). While the volume decline was significant, the decline is heavily weighted towards lower price segments. Furthermore, it comes after a record volume of exports in 2018, which followed a record Australian wine grape harvest in 2017. However, there was less wine available for export in 2019 as there were two consecutive lower vintages in 2018 and 2019 and inventory had already been drawn down.

Figure 1: Value and volume of Australian wine exports over time



Packaged and unpackaged wine

Bottled wine shipments increased by 7 per cent in value to \$2.4 billion and decreased in volume by 5 per cent to 342 million litres (38 million 9-litre case equivalents). The increase in value was due to a 13 per cent rise in the average value per litre of bottled wine to a calendar year record of \$7.04. This was principally the result of exceptional growth in Australia's premium and fine wine exports.

Unpackaged wine exports decreased by 12 per cent in value to \$488 million and decreased 18 per cent in volume to 395 million litres. The average price of unpackaged wine increased by 6 per cent to \$1.24 per litre.

Local supply pressures are causing a decline in volume of both unpackaged and glass bottle exports. However, this decline is stronger for unpackaged wine, given the competitive nature of the commercial wine market. The OIV reported that the volume of global wine production increased by 4.4 billion litres in 2018 with production increasing from the big three: Italy, France and Spain, as well as Chile.

The decline in the volume of glass bottle exports is less apparent due to the growth of exports at the premium end of the market.

Price segments

Consistent with the trends in many key markets, Australian exports declined at lower price points and increased at the higher end (see Figure 2).

The decline was strongest at the very low end with the value of exports below \$2.50 per litre FOB falling by 17 per cent to \$463 million. Conversely, the growth was strongest at the high end, with the value of exports at \$10 per litre or more FOB increasing by 22 per cent to a record \$1.1 billion. By value, this is the biggest price segment for Australian wine exports, accounting for more than a third of the total value of exports. Exports in this segment have more than tripled since 2014.

Commentary (continued)

The stand-out sub-categories were wines exported at \$30 or more per litre FOB, highlighting the growing demand for Australia's finest wines.

Figure 2: Exports by price segment

Price segment (A\$/litre)	MAT December 2019	Value change	Growth rate
\$2.49 and under	\$463	-\$92.2	-17%
\$2.50 to \$4.99	\$812	-\$10.9	-1%
\$5.00 to \$7.49	\$381	\$1.7	0.4%
\$7.50 to \$9.99	\$162	-\$3.9	-2%
\$10.00 to \$14.99	\$246	\$12.8	5%
\$15.00 to \$19.99	\$86	\$8.6	11%
\$20.00 to \$29.99	\$221	\$3.5	2%
\$30.00 to \$49.99	\$146	\$46.9	47%
\$50.00 to \$99.99	\$271	\$83.5	44%
\$100.00 to \$199.99	\$62	\$29.7	91%
\$200.00 +	\$57	\$9.0	19%
Total value	\$2,909	\$88.6	3%

Exporter performance

There were 2903 active exporters in the year, a 14 per cent increase on the previous year. There were 1881 companies that contributed to the growth in exports by either increasing their level of exports or commencing export. These companies contributed \$4752 million towards the overall growth in exports. There were also 1557 exporters that either decreased their level of exports or stopped exporting in the past 12 months. These companies offset the growth in exports by \$387 million.

The largest exporters – those that export more than 100,000 9-litre case equivalents – make up only 2 per cent of exporters but contribute 72 per cent of the value and 87 per cent of the volume, while the smallest exporters make up 91 per cent of the cohort, but contribute only 16 per cent of the value and 6 per cent of the volume (see Figure 3).

Figure 3: Export value and volume by exporter size

Volume exported in MAT December 2019	# of exporters	Share of exporters	Million cases exported	Share of total export volume	Million AUD exported	Share of total export value
> 100,000 9l cases	55	2%	71	87%	\$2,085	72%
50,001 - 100,000 9l cases	36	1%	2	3%	\$126	4%
10,000 - 50,000 9l cases	174	6%	4	4%	\$225	8%
< 10,000 9l cases	2,638	91%	5	6%	\$473	16%
Total	2,903	100%	83	100%	\$2,909	100%

Figure 4: Export growth rates by exporter size

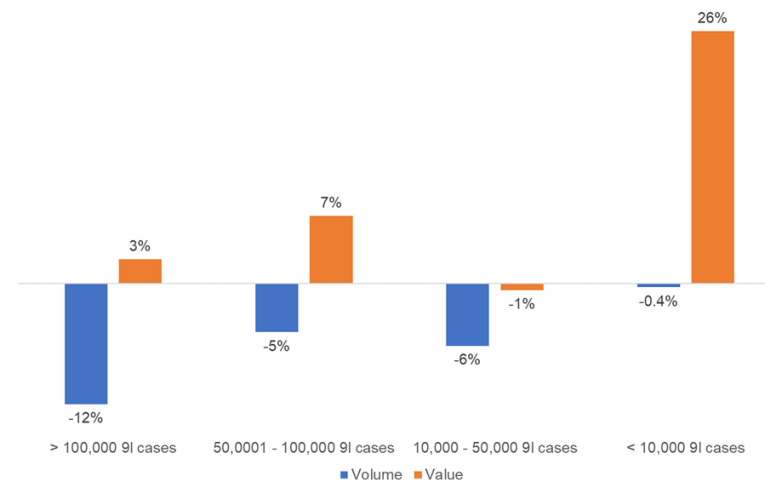


Figure 4 illustrates that all but one of the groups categorized by exporter size recorded value growth and all recorded declines in volume. The largest exporters recorded the biggest decline in volume while the smallest exporters were the least impacted by volume and recorded the biggest rate of growth in value.

Commentary (continued)

Wine styles

Red wine continues to be the most popular wine style exported from Australia, and value increased by 5 per cent to \$2.3 billion in the year ended December 2019. The value of white wine exports declined – by 5 per cent to \$575 million.

All but one the top five variety label claims of red wine recorded growth:

- Shiraz exports grew by 8 per cent to \$713 million
- Cabernet Sauvignon exports grew by 17 per cent to \$417 million
- No variety label claim (red blend, dry red etc.) exports declined by 12 per cent to \$401 million
- Shiraz/Cabernet Sauvignon exports grew marginally (by 0.1 per cent) to \$232 million, and
- Cabernet Sauvignon/Shiraz exports grew by 42 per cent to \$161 million.

There were mixed results for the top five variety claims of white wine:

- No label claim (dry white, sweet white etc.) exports declined by 10 per cent to \$237 million
- Chardonnay exports grew by 1 per cent to \$186 million
- Sauvignon Blanc exports declined by 2 per cent to \$43 million
- Pinot Grigio exports declined by 8 per cent to \$29 million, and
- Pinot Gris grew by 12 per cent to \$26 million.

The value of unpackaged shipments of red wine declined by 13 per cent to \$300 million, while the average value increased by 7 per cent to \$1.44 per litre FOB.

Unpackaged shipments of white wine declined by 12 per cent to \$189 million, with the average value increasing by 6 per cent to \$1.01 per litre FOB.

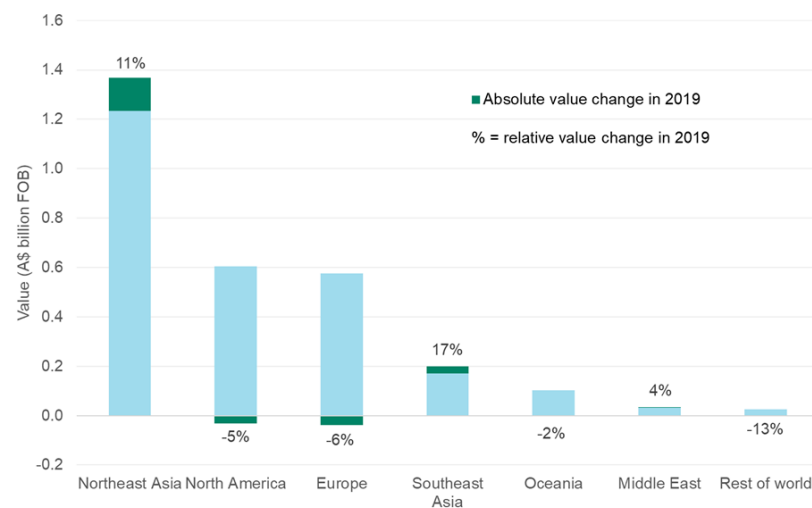
Destinations

In the year ended December 2019, Australia exported wine to 120 markets. Asia was the growth centre for Australian exports. Exports to Northeast Asia increased by 11 per cent to \$1.37 billion and to Southeast Asia by 17 per cent to \$200 million (see figure 5). The Middle East also saw growth, up 4 per cent to \$34 million.

The value of exports to other regions declined:

- North America, down 5 per cent to \$604 million
- Europe, down 6 per cent to \$576 million
- Oceania, down 2 per cent to \$103 million

Figure 5: Value of exports by region



Commentary (continued)

The top five destinations by value were:

- Mainland China, up 13 per cent to \$1.17 billion
- USA, down 1 per cent to \$419 million
- UK, down 9 per cent to \$352 million
- Canada, down 13 per cent to \$183 million
- Singapore, up 18 per cent to \$105 million.

China (inc. Hong Kong and Macau) was up 12 per cent to \$1.28 billion.

The top five destinations by volume were:

- United Kingdom, down 9 per cent to 224 million litres
- United States, down 14 per cent to 138 million litres
- Mainland China, down 17 per cent to 135 million litres
- Canada, down 25 per cent to 55 million litres
- Germany, down 11 per cent to 32 million litres.

China

Exports to China (including Hong Kong and Macau) in the 12 months to December 2019 increased by 12 per cent in value to \$1.28 billion while volume declined 17 per cent in volume to 142 million litres (15.8 million 9-litre case equivalents). Average value increased by 35 per cent to \$8.99 per litre FOB. Both value and average value are calendar year records.

Mainland China

Exports to mainland China increased by 13 per cent in value to \$1.17 billion, also a record, while volume declined by 17 per cent to 135 million litres (15 million 9-litre case equivalents). Average value increased by 37 per cent to a record level of \$8.69 per litre FOB.

While glass bottle volume did decline, by 3 per cent to 114 million litres (12.7 million 9-litre case equivalents), most of the volume decline was in unpackaged wine, down by 55 per cent to 21 million litres (2.3 million 9-litre case equivalents).

Consistent with the decline in unpackaged wine, price segments below \$5 per litre FOB declined, with the \$2.49 and under segment being the biggest contributor (see Figure 6). Exports with an average value above \$10 per litre increased by 35 per cent to \$702 million, the largest absolute growth being in the \$50 to \$99.99 per litre segment.

Figure 6: Exports to mainland China by price segment (million AUD FOB)

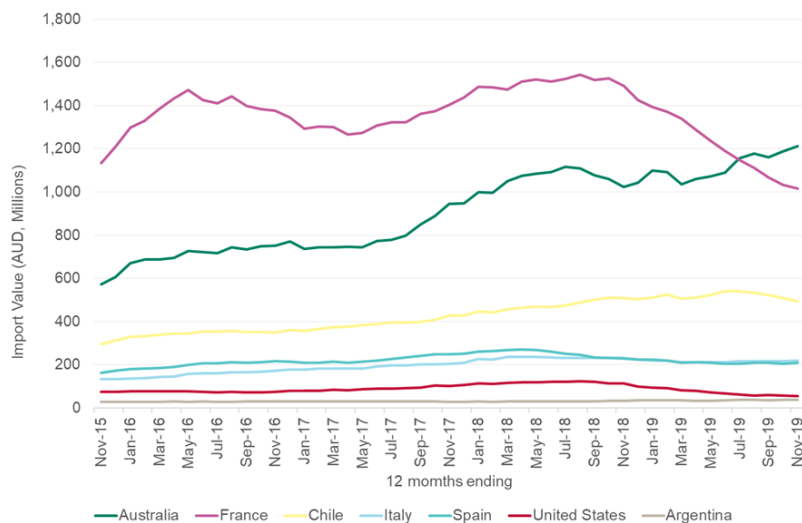
Price segment (A\$/litre)	MAT December 2019	Value change	Growth rate
\$2.49 and under	\$25	-\$36.7	-60%
\$2.50 to \$4.99	\$214	-\$16.4	-7%
\$5.00 to \$7.49	\$171	\$15.5	10%
\$7.50 to \$9.99	\$61	-\$3.8	-6%
\$10.00 to \$14.99	\$129	\$10.7	9%
\$15.00 to \$19.99	\$52	\$13.7	36%
\$20.00 to \$29.99	\$150	-\$0.6	-0.4%
\$30.00 to \$49.99	\$105	\$50.3	92%
\$50.00 to \$99.99	\$191	\$73.4	62%
\$100.00 to \$199.99	\$43	\$28.2	192%
\$200.00 +	\$32	\$5.0	18%
Total value	\$1,173	\$139.3	13%

This month the International Monetary Fund (IMF) revised up its gross domestic product (GDP) growth prediction for China from 5.8 per cent to 6.0 per cent for 2020. The change from its previous prediction followed the tariff reductions included in the recent phase one trade deal with the United States, but precede any changes related to the coronavirus. However, the IMF expects China's growth rate to ease further to 5.8 per cent in 2021, a downward revision from the 5.9 per cent rate previously expected, due to the continuing impact of the US–China trade dispute and further toughening of Chinese financial regulation. Despite softening, China's economic growth is still stronger than for most other advanced economies. For example, the IMF has forecast economic growth in 2020 to be 2 per cent in the US, 1.4 per cent in the UK, 1.3 per cent in the Euro area and 0.7 per cent in Japan

Commentary (continued)

While the value of total wine imported by China has declined, Australia has consolidated its position as the number one imported country of origin ahead of France (see figure 7). While Australia's export value to China continued growing in 2019, the value of French imports continued the decline that commenced in 2018. Australia now holds a 35 per cent value share of total wine imports compared to France with 29 per cent. Chile is number one by volume but third in value with a 14 per cent share. More than half of Chile's exports to China are unpackaged, compared to 15 per cent of Australia's exports.

Figure 7: China imports of total wine by value from top seven countries of origin



Stuart Barclay, Wine Australia's General Manager Marketing, said 'Australian wine in mainland China is continuing to consolidate its market leading position with an increase in value that shows ongoing confidence in the Australian category in China. Volumes continue to come under pressure under \$2.50 per litre as Chile aggressively targets lower value wine segments. The strong position of Australia in China reinforces the fact that Chinese wine drinkers are recognising and seeing Australian wines as exciting and dynamic. With continued sluggish growth across the China wine market it is encouraging to see Australia grow in value.'

North America

United States of America

Exports to the USA decreased by 1 per cent to \$419 million during the year ended December 2019. Volume declined by 14 per cent to 138 million litres (15 million 9-litre case equivalents), leading to a 15 per cent increase in average value to \$3.05 per litre. This is the first year since 2008 that the average value has exceeded \$3 per litre.

Over 90 per cent of the volume decline was in shipments of unpackaged wine, down by 28 per cent to 56 million litres (6.2 million 9-litre case equivalents). The decline in unpackaged shipments is due to a combination of an increase in US wine production in 2018 as well as the lower volume of Australian wine available for export.

Glass bottle shipments also declined but at a much lower rate of 2 per cent to 82 million litres (9.1 million 9-litre case equivalents). However, the value of bottled wine increased by 4 per cent to \$351 million, due to a 6 per cent increase in the average value of bottled wine to \$4.29 per litre FOB.

This increase in average value of bottled wine is a result of the growth in exports of premium Australian wine to the USA. Exports with an average value of \$10 per litre and above FOB increased by 4 per cent to \$43 million.

At the other end of the price spectrum, there was solid growth at \$2.50 to \$4.99 per litre FOB (see Figure 8).

Driving the growth of exports at \$10 per litre and above was the \$20.00 to \$29.99 segment, up 32 per cent to \$8 million.

Commentary (continued)

Figure 8: Exports to the United States by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT December 2019	Value change	Growth rate
\$2.49 and under	\$73	-\$22.0	-23%
\$2.50 to \$4.99	\$265	\$19.1	8%
\$5.00 to \$7.49	\$22	-\$0.8	-3%
\$7.50 to \$9.99	\$17	-\$2.7	-14%
\$10.00 to \$14.99	\$19	\$1.4	7%
\$15.00 to \$19.99	\$7.6	-\$0.7	-8%
\$20.00 to \$29.99	\$8.0	\$2.0	32%
\$30.00 to \$49.99	\$3.9	-\$0.6	-13%
\$50.00 to \$99.99	\$2.1	-\$0.6	-24%
\$100.00 to \$199.99	\$1.0	\$0.0	-1%
\$200.00 +	\$0.6	\$0.2	43%
Total value	\$419	-\$4.7	-1%

The US market is showing growth at the premium end of the market. Off-trade figures from IRI Worldwide for the year ended December 2019 show that sales below US\$11 per bottle declined by 5 per cent while sales at US\$11 and above per bottle grew by 7 per cent. The stand-out growth segment for Australia was at US\$20.00 to US\$24.99 per bottle, with sales up 13 per cent. The increased shipments of wine at \$10 per litre and above FOB mean that Australia is well placed to meet this demand. The challenge for Australia is that currently 98 per cent of Australian sales in the US off-trade market are at below US\$11 per bottle.

Aaron Ridgeway, Wine Australia's Regional General Manager Americas, said 'The US Wine market is entering a period of intense competition and uncertainty driven by declines in wine consumption for the first time in 25 years and persistent competition from domestic and imported wine. Growth in spirits and the rise of hard seltzer is dominating the market. The imposition of Trump tariffs on wine and whisky from certain EU countries including France, Spain and Germany has dramatically shaken the market with significant falls in volume and value with France leading the downturn with 18 per cent volume and 42 per cent down in value MAT November 2019.

Australia has not been immune to this turbulence with volumes dropping 14 per cent (driven by lower sales in bulk wine shipments) but there are encouraging signs amid the challenging market with overall value down just 1 per cent to \$419.47 million AUD. Value per liter of Australia wines has risen by 15 per cent. More interestingly is the rise in wine above \$10 per litre which is up 5 per cent volume and 4 per cent in value. Exports by this measure have grown 50 percent since 2014.

During September – December 2019 Wine Australia in collaboration with industry on the \$8 Million AUD in the Far from Ordinary campaign funded through the Commonwealth Export and Regional Wine Support Package. The campaign consisted of multi-channel promotions and awareness building through consumer and trade engagement designed to build availability and reach in the USA.

The momentum that Far From Ordinary generated has been substantial with Wine.com seeing a significant uplift in Australian wine sales in the 2nd Quarter of 2019 – 2020. The online retailer recorded a 27 per cent increase in Australian sales in August–September and subsequent double-digit growth in October, November and December. This positive surge of interest in Australia was also witnessed in the on-premise channels with Vino Volo selling 43,000 glasses of Australian wine in September 2019 – December 2019 through its 47 outlets in North America.

The positive uplift in interest in Australia also witnessed nationwide 850 new wine accounts being set up in August 2019 – October 2019 resulting in 1204 new points of distribution delivering a significant lift in visibility of the Australian wine category across the USA.

But it must be noted that the momentum from Far from Ordinary needs to be maintained and the North American team is continuing to work with the Australian category to promote and commercialise opportunities in retail and on-premise channels.'

Commentary (continued)

Canada

In the year ended December 2019, Australian wine exports to Canada declined by 13 per cent in value to \$183 million and 25 per cent in volume to 55 million litres (6.1 million 9-litre case equivalents). The average value of exports increased by 16 per cent to \$3.30 per litre.

Unpackaged and bottled wine each contributed equally to the decline in value, while the volume decline was heavily skewed towards unpackaged wine shipments.

Most provinces recorded declines, with British Columbia, Ontario and Alberta being the largest contributors. However, exports to Quebec grew by 5 per cent to \$48 million.

Figure 9: Exports to Canada by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT December 2019	Value change	Growth rate
\$2.49 and under	\$35	-\$13.5	-28%
\$2.50 to \$4.99	\$40	-\$6.5	-14%
\$5.00 to \$7.49	\$66	-\$5.8	-8%
\$7.50 to \$9.99	\$18	\$0.3	2%
\$10.00 to \$14.99	\$20	\$0.3	2%
\$15.00 to \$19.99	\$1.9	-\$0.5	-21%
\$20.00 to \$29.99	\$1.2	-\$0.2	-11%
\$30.00 to \$49.99	\$1.2	-\$0.2	-16%
\$50.00 to \$99.99	\$0.4	-\$0.2	-29%
\$100.00 to \$199.99	\$0.1	-\$0.03	-17%
\$200.00 +	\$0.1	-\$0.04	-30%
Total value	\$183	-\$26	-13%

Australia is not the only country experiencing declining exports to the Canadian wine market. For example, according to the Canadian Vintners Association, in the 12 months ended November 2019, sales declined from Italy by 2 per cent, from the United States by 3 per cent, from Chile by 2 per cent and from Argentina by 5 per cent. The total market declined in volume by 1 per cent to 52 million cases. Like other markets, wine is facing challenges from other alcoholic beverages such as spirits and ready-to-drink products.

Europe

United Kingdom

Exports to the UK declined by 9 per cent in value to \$352 million and 9 per cent in volume to 224 million litres (25 million 9-litre case equivalents). Average value decreased by 1 per cent to \$1.57 per litre FOB.

Unlike other markets, the decline in value was most significant in the bottled wine category, decreasing by 18 per cent in value to \$143 million and 23 per cent in volume to 33 million litres (3.7 million 9-litre case equivalents).

Unpackaged wine shipments decreased by 2 per cent in value to \$209 million and 6 per cent in volume to 191 million litres (21 million 9-litre case equivalents). Some 85 per cent of the total volume shipped to the UK is unpackaged and bottled in market. Some of the exports are also then shipped to other European countries.

The bright spot for exports to the UK is at the higher end of the market with exports at \$30.00 to \$99.99 per litre FOB growing by 15 per cent, albeit off a small base (see Figure 10).

Figure 10: Exports to United Kingdom by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT December 2019	Value change	Growth rate
\$2.49 and under	\$201	-\$9.2	-4%
\$2.50 to \$4.99	\$94	-\$21.5	-19%
\$5.00 to \$7.49	\$23	-\$3.0	-11%
\$7.50 to \$9.99	\$13	-\$0.1	-1%
\$10.00 to \$14.99	\$10	-\$2.0	-16%
\$15.00 to \$19.99	\$3.1	-\$1.2	-28%
\$20.00 to \$29.99	\$3.0	-\$0.2	-5%
\$30.00 to \$49.99	\$3.2	\$0.4	15%
\$50.00 to \$99.99	\$1.3	\$0.2	15%
\$100.00 to \$199.99	\$0.3	-\$0.04	-13%
\$200.00 +	\$0.4	-\$0.1	-18%
Total value	\$352	-\$36.7	-9%

Commentary (continued)

Australia is ranked first in the UK off-premise wine market and has been for over 15 years. It has a 23 per cent market share – nearly twice that of second-placed Italy, which has a 12 per cent market share and has recently overtaken the USA for second place in the off-trade. According to IRI Worldwide, Australia’s wine sales declined by 3 per cent in value to £1.2 billion. Australian sales declined at the big volume end of the market, which offset growth in the following price segments:

- £7.01 to £8.00, by 8 per cent
- £8.01 to £9.00, by 13 per cent, and
- £10.01 to £20.00, by 17 per cent.

Laura Jewell MW, Wine Australia’s Regional General Manager EMEA said ‘The latest on Brexit is that the UK has left the EU on the 31st January, with a transition period in place until the end of 2020. This is following the Conservative win at the general election in December 2019 with a clear majority, and the passing of the Withdrawal Agreement Bill. However, the government’s recent decision to legislate against an extension to the transition period leaves the possibility of a no-deal exit next year.

During the transition period it is planned that a trade deal be negotiated with the EU. However, trade deals typically take years to conclude and it seems questionable that without an extension to the transition period that a deal could be concluded within just 11 months. Realistically, there are also only really 6 months to negotiate a deal, as the negotiating mandate would be agreed in March and the EU has said that the deal should be put before the European Parliament before its November plenary session. However, saying this, there are ways that a deal could be concluded faster – for example it has been suggested that a deal could be sought which is very similar to the UK’s current relationship with the EU (zero tariffs, zero quotas, similar rules).

There will continue to be uncertainty in the UK while the early FTAs are negotiated with the EU, US, Australia and New Zealand.’

Other European markets of note:

- Germany, down 10 per cent to \$48 million
- Netherlands, up 3 per cent to \$43 million
- Denmark, up 13 per cent to \$28 million, and
- Sweden, down 10 per cent to \$22 million.

Asia

Singapore

Singapore jumped into the top five export destinations for the first time as value increased by 18 per cent to a record \$105 million. More than three-quarters of the value was at \$10 or more per litre FOB, leading to an average value of \$14.16 per litre. Of destinations that import at least \$500,000 annually of Australian wine, this ranks Singapore in second place in average value, marginally behind Hong Kong. Relatively high taxes on alcohol in Singapore are a contributing factor to the high average value.

Not all wine that is exported to Singapore is consumed in the country. The port of Singapore is the second busiest port in the world and considered a hub of entrepôt (or transshipment) trade to other Asian markets. In 2019, Singapore imported 31 million litres of wine and exported 14 million litres.

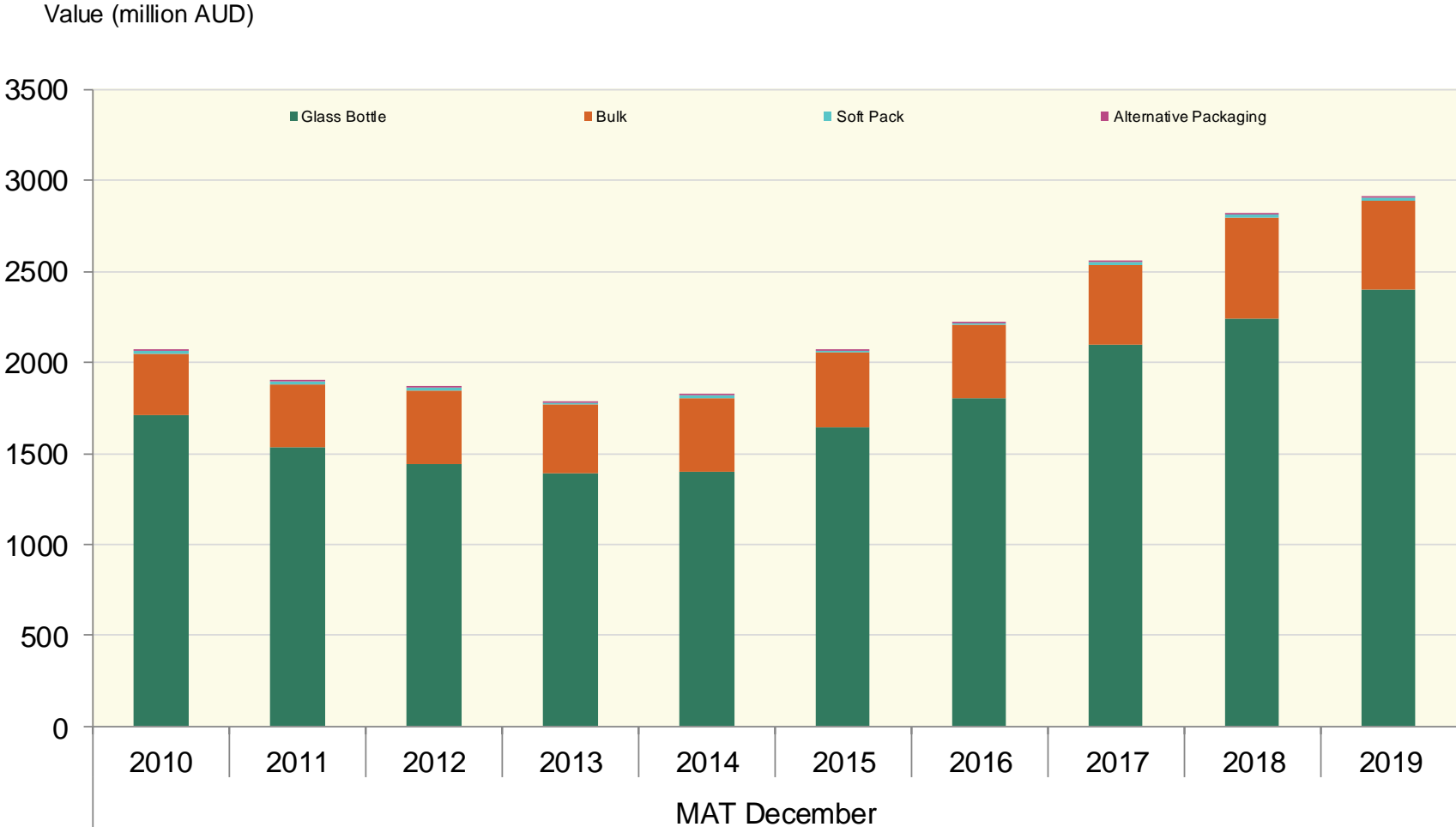
According to the International Wine and Spirit Record, Australia was the number one country of origin in Singapore in 2018, with a 31 per cent share of the market ahead of France with an 18 per cent share.

Other Asian markets of note:

- Hong Kong, down 0.4 per cent to \$104 million
- Japan, down 4 per cent to \$52 million
- Malaysia, up 9 per cent to \$35 million
- Thailand, down 12 per cent to \$23 million
- South Korea, up 5 per cent to \$19 million.

Historic overview of exports

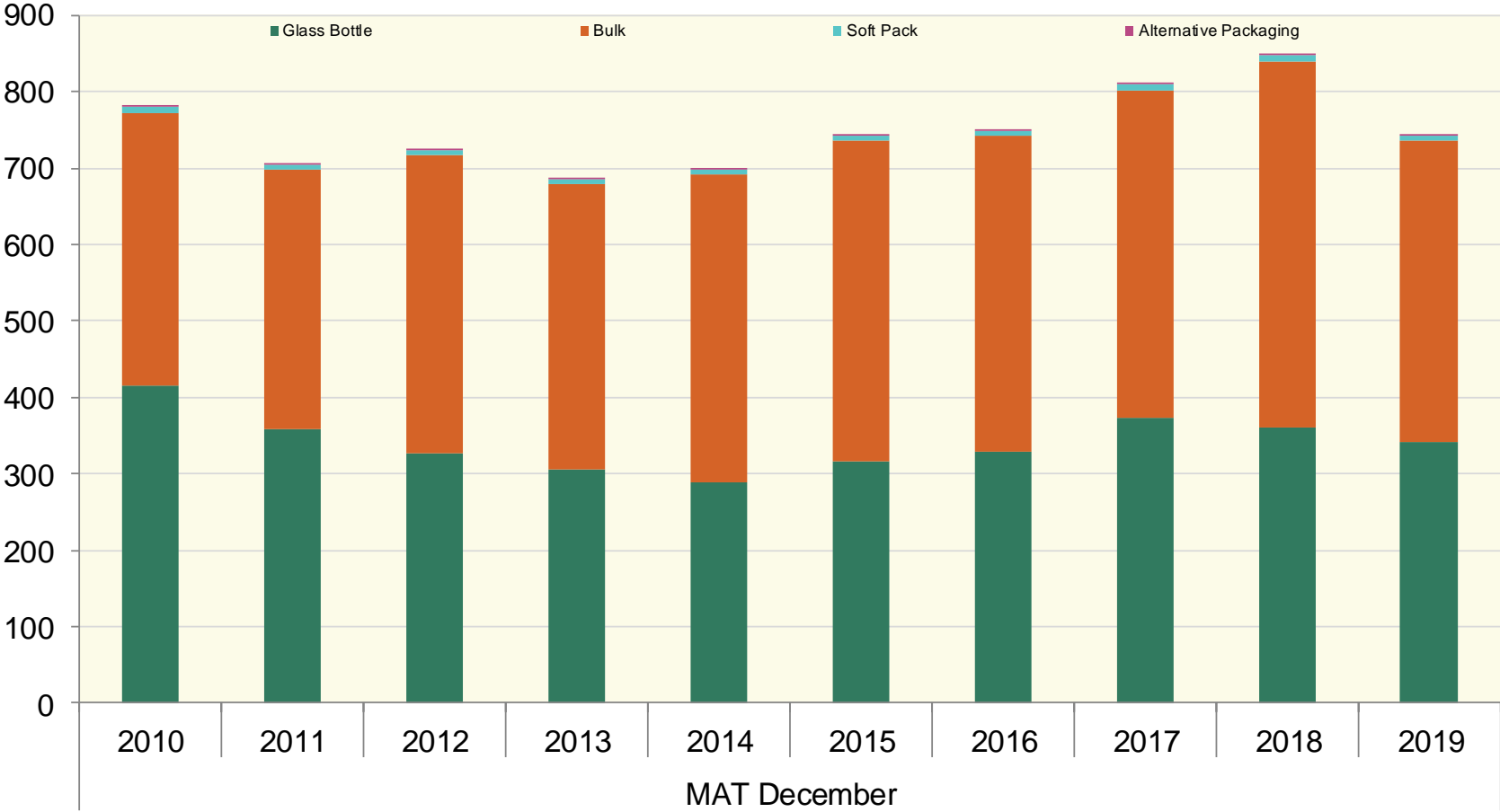
Value by container type in A\$ million



Historic overview of exports

Volume by container type ('000 litres)

Volume (million litres)

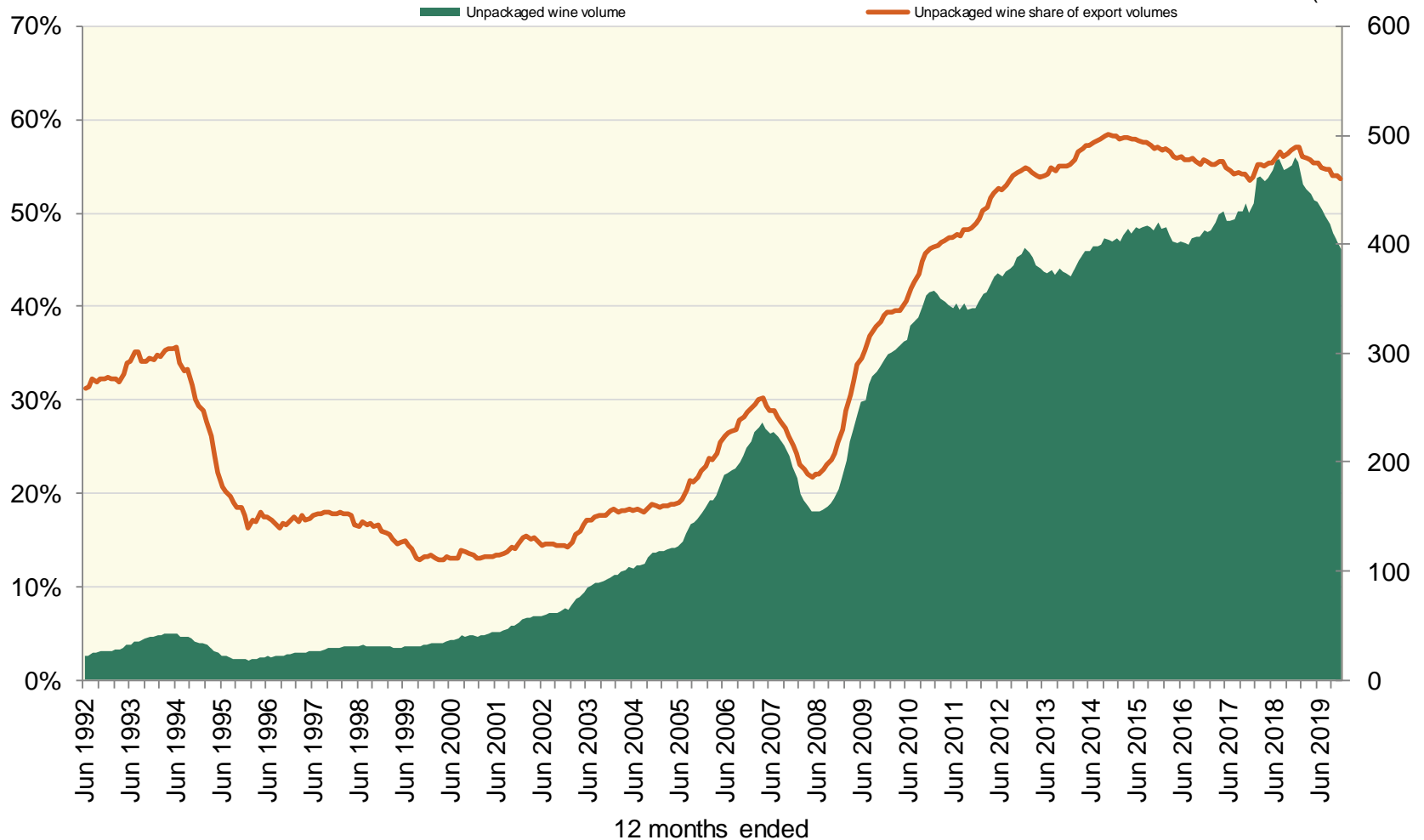


Historic overview of exports

Unpackaged share of export volumes

Unpackaged wine share
of export volumes

Unpackaged wine export
volume (million litres)

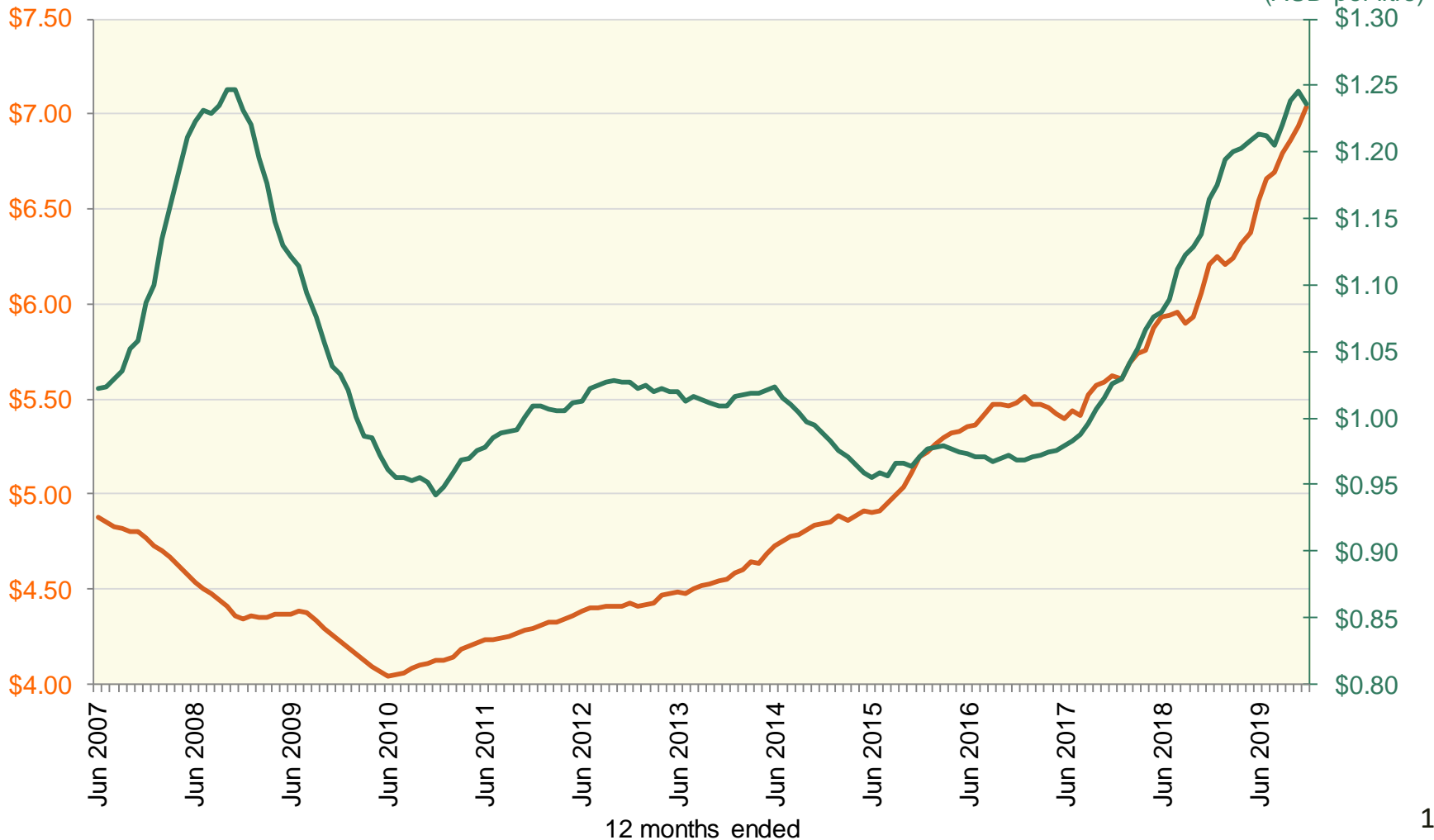


Historic overview of exports

Average value of exports

Bottled average value
(AUD per litre)

Unpackaged average
value
(AUD per litre)

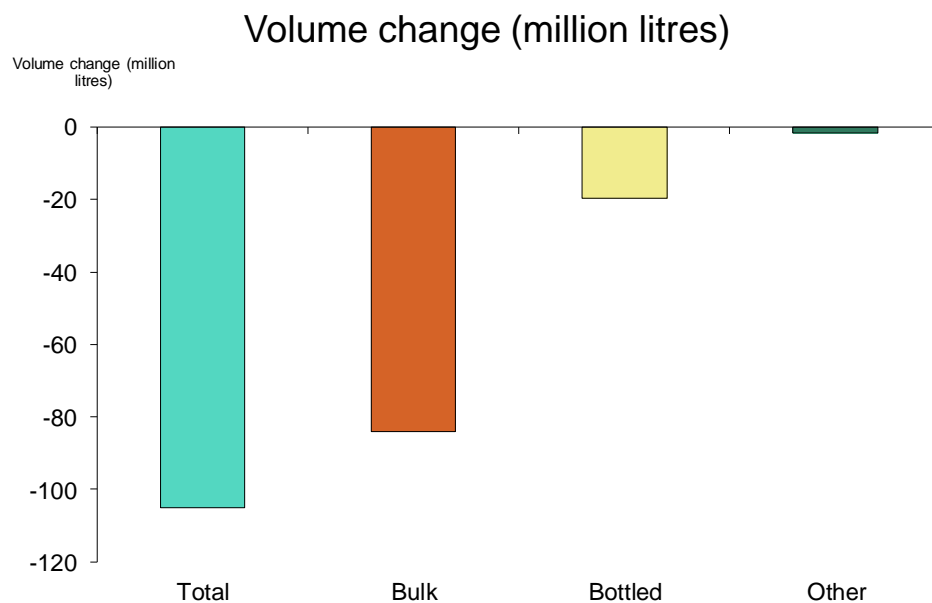
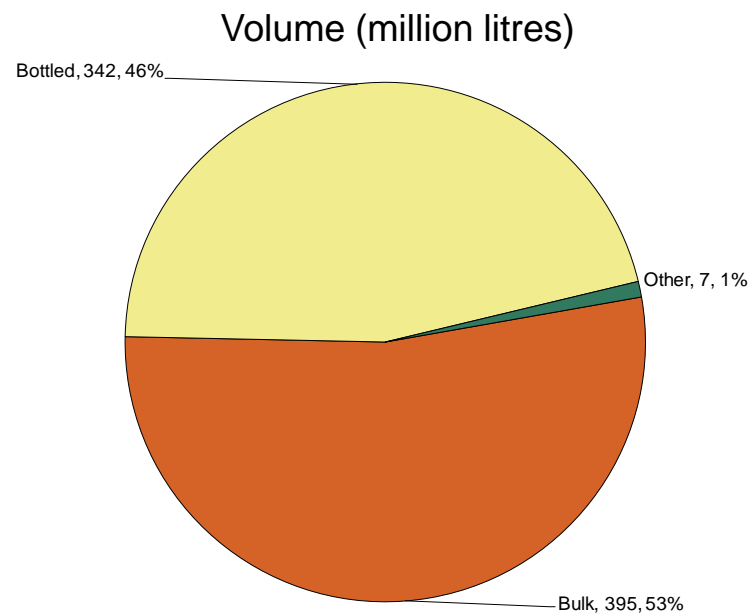


Exports by container type

MAT December 2019

		Volume (ML)	Value (A\$M FOB)	Average Value (A\$/L FOB)
Bottled	2019	342	2,403	7.04
	Change Share	-5% 46%	7% 83%	13%
Bulk	2019	395	488	1.24
	Change Share	-18% 53%	-12% 17%	6%
Other	2019	7	17	2.42
	Change Share	-18% 1%	-19% 1%	-1%
Total	2019	744	2,909	3.91
	Change Share	-12% 100%	3% 100%	18%

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



Wine exports

by country, container and colour

Value for MAT December 2019

	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 2019 (A\$ '000s)	Change %	MAT December 2019 (A\$ '000s)	Change %	MAT December 2019 (A\$ '000s)	Change %	MAT December 2019 (A\$ '000s)	Change %	MAT December 2019 (A\$ '000s)	Change %	MAT December 2019 (A\$ '000s)	Change %	MAT December 2019 (A\$ '000s)	Change %	MAT December 2019 (A\$ '000s)	Change %	MAT December 2019 (A\$ '000s)	Change %
China, Pr	1,080,302	18%	48,897	-41%	1,239	65%	26,965	2%	1,826	-25%	122	62%	8,049	55%	5,852	28%	1,173,254	13%
United States Of America	203,034	3%	29,076	-19%	0	-100%	143,094	7%	39,796	-23%	0	-100%	3,431	-3%	1,043	3%	419,474	-1%
United Kingdom	80,231	-22%	133,804	-1%	11	na	57,709	-13%	75,323	-5%	11	na	4,355	8%	863	-41%	352,308	-9%
Canada	98,727	-8%	14,944	-28%	267	-72%	43,102	-7%	19,898	-24%	629	-67%	3,518	-6%	2,154	23%	183,238	-13%
Singapore	90,938	21%	0	na	240	2%	7,473	3%	0	na	95	-4%	5,259	-11%	694	12%	104,700	18%
Hong Kong	91,021	-1%	71	++	1,443	-4%	8,477	13%	0	na	297	19%	2,100	-8%	813	-5%	104,221	0%
New Zealand	51,739	-1%	12,161	-10%	821	4%	9,093	-13%	7,112	-8%	396	-28%	5,201	12%	4,590	42%	91,114	-2%
Japan	19,249	-12%	5,746	-2%	2,637	8%	11,963	6%	3,177	-4%	1,026	3%	4,697	-3%	3,994	-6%	52,489	-4%
Germany, Federal Republic	10,234	-21%	19,531	-4%	0	na	1,169	-74%	16,760	9%	0	na	132	16%	10	-62%	47,836	-10%
Netherlands	16,224	21%	3,960	-18%	0	na	15,508	3%	6,299	-15%	0	na	938	-5%	46	-61%	42,975	3%
Malaysia	32,138	11%	0	na	83	-26%	2,771	2%	0	na	5	-68%	184	-11%	194	5%	35,375	9%
United Arab Emirates	23,187	1%	0	na	689	1%	7,071	30%	0	na	438	-1%	689	-32%	580	-14%	32,654	5%
Denmark	7,722	-19%	11,832	56%	0	na	2,831	-30%	5,241	87%	0	na	430	-47%	115	-47%	28,172	13%
Thailand	16,706	2%	568	-61%	448	-70%	3,864	-11%	273	-58%	111	-86%	1,113	-4%	174	-7%	23,257	-12%
Sweden	13,188	0%	1,516	-32%	0	na	4,932	-14%	883	-47%	0	na	923	-21%	207	++	21,649	-10%
Korea, R	15,160	7%	0	na	1,228	21%	2,443	-6%	0	na	63	69%	474	-8%	103	-12%	19,471	5%
Taiwan	15,444	-12%	0	na	347	-2%	1,348	-2%	0	-100%	111	-19%	158	65%	242	-22%	17,650	-11%
Belgium	4,637	34%	3,859	31%	0	na	2,834	-18%	5,033	3%	0	na	423	-5%	211	-1%	16,998	10%
Indonesia	11,315	++	0	na	6	-46%	1,843	48%	0	na	0	-100%	263	++	193	-26%	13,620	++
Finland	4,058	-20%	3,847	-14%	0	na	2,038	-20%	2,236	-20%	0	na	245	-10%	529	94%	12,954	-16%
Rest of the world	68,098	4%	9,688	36%	1,506	-15%	25,938	5%	4,685	-28%	933	-26%	2,842	-8%	1,719	-8%	115,409	3%
World	1,953,353	9%	299,502	-13%	10,968	-10%	382,467	-1%	188,541	-12%	4,236	-36%	45,424	3%	24,327	9%	2,908,818	3%

Wine exports

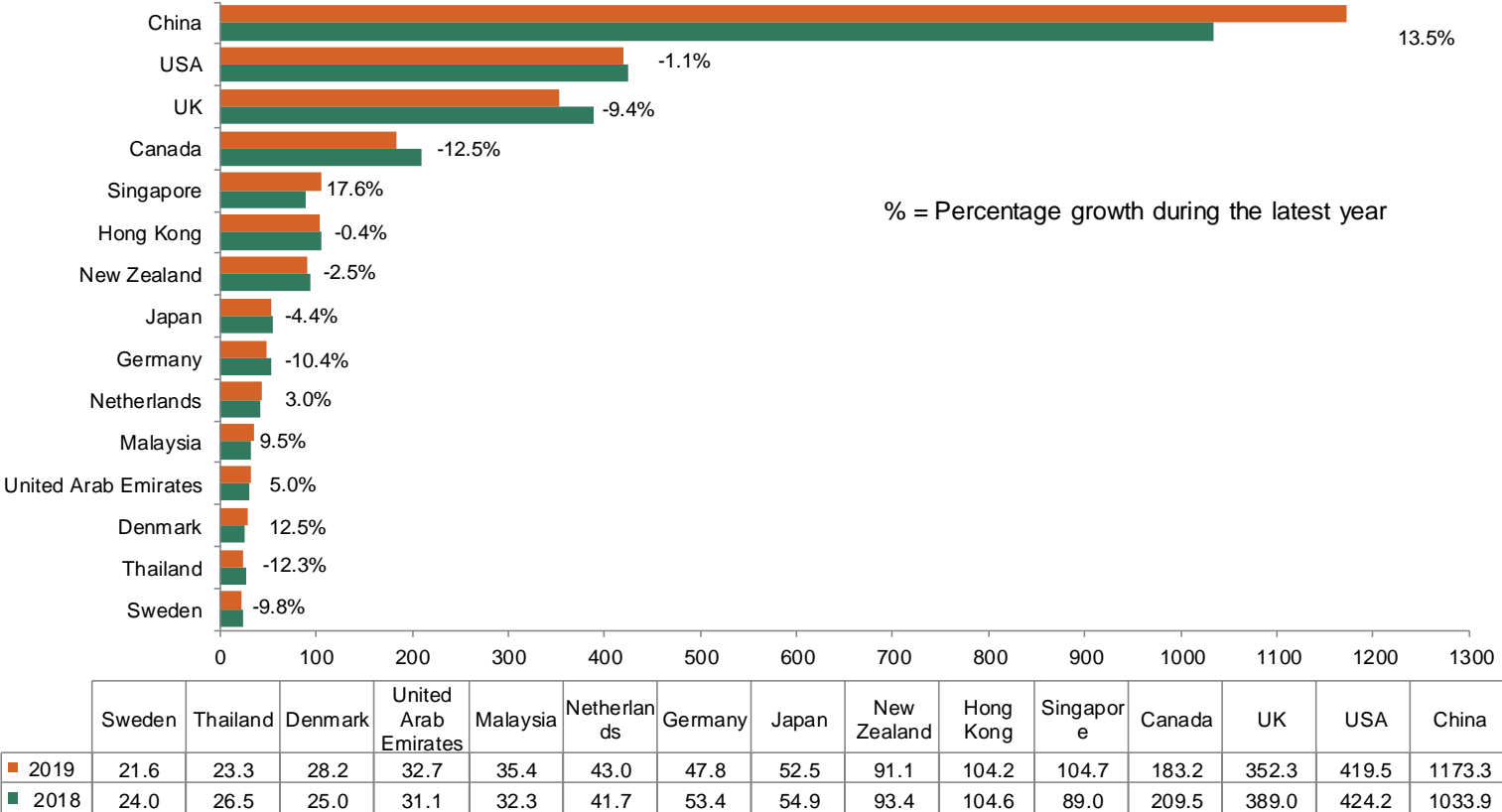
by country, container and colour

Volume for MAT December 2019

	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 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %
United Kingdom	16,326	-28%	112,178	-6%	2	na	15,765	-17%	78,893	-5%	2	na	875	9%	148	-41%	224,189	-9%
China, Pr	108,084	-3%	19,864	-55%	418	83%	4,168	-1%	960	-37%	40	61%	673	31%	751	20%	134,958	-17%
United States Of America	43,861	-3%	17,817	-22%	0	-100%	37,190	1%	38,037	-30%	0	-100%	548	-22%	130	-20%	137,584	-14%
Canada	15,479	-12%	11,349	-40%	70	-69%	8,735	-10%	18,711	-27%	168	-62%	571	-10%	385	16%	55,467	-25%
Germany, Federal Republic	2,016	-28%	13,006	-14%	0	na	254	-75%	16,247	0%	0	na	13	81%	1	-90%	31,537	-11%
New Zealand	9,975	-1%	6,765	-17%	387	10%	2,846	-15%	7,884	-12%	187	-11%	991	15%	897	46%	29,931	-8%
Netherlands	4,115	10%	2,790	-28%	0	na	4,450	4%	5,999	-25%	0	na	183	-26%	4	-88%	17,541	-13%
Japan	3,482	-3%	4,435	-5%	1,362	-5%	2,154	7%	2,982	-12%	639	10%	915	-11%	765	-10%	16,735	-4%
Denmark	1,041	-34%	7,976	31%	0	na	665	-36%	4,923	64%	0	na	90	-50%	7	-79%	14,701	23%
Belgium	675	44%	2,859	12%	0	na	541	-4%	5,088	-8%	0	na	66	-16%	36	36%	9,264	1%
Hong Kong	5,369	-7%	48	98%	512	-8%	970	0%	0	na	117	15%	125	-9%	65	-17%	7,206	-5%
Singapore	5,585	22%	0	na	131	2%	928	3%	0	na	44	-13%	625	-4%	82	22%	7,395	16%
Finland	602	-16%	2,135	-28%	0	na	396	-25%	2,044	-27%	0	na	22	-36%	112	67%	5,311	-25%
Sweden	2,470	-4%	798	-40%	0	na	1,285	-19%	432	-50%	0	na	244	-20%	36	++	5,265	-21%
France	108	-45%	3,725	38%	0	-100%	59	-4%	2,891	74%	8	++	0	-61%	0	-76%	6,792	46%
Thailand	2,270	9%	408	-63%	217	-72%	848	-6%	240	-65%	51	-88%	168	-2%	35	-19%	4,237	-31%
United Arab Emirates	1,872	-10%	0	na	385	-5%	1,277	38%	0	na	275	-9%	94	-33%	149	-19%	4,053	1%
Malaysia	2,263	-12%	0	na	47	-22%	458	-6%	0	na	3	-56%	26	-13%	34	8%	2,830	-11%
Korea, R	1,966	3%	0	na	566	18%	374	-15%	0	na	26	++	63	-15%	12	-29%	3,007	2%
Ireland	1,131	-7%	182	75%	0	na	1,153	-10%	233	++	0	na	22	-34%	2	-63%	2,722	0%
Rest of the world	12,630	6%	1,975	-5%	767	-13%	5,188	6%	1,008	-83%	439	-32%	508	-2%	450	-13%	22,966	-16%
World	241,318	-6%	208,310	-19%	4,865	-12%	89,704	-6%	186,572	-16%	1,999	-29%	6,823	-5%	4,100	4%	743,690	-12%

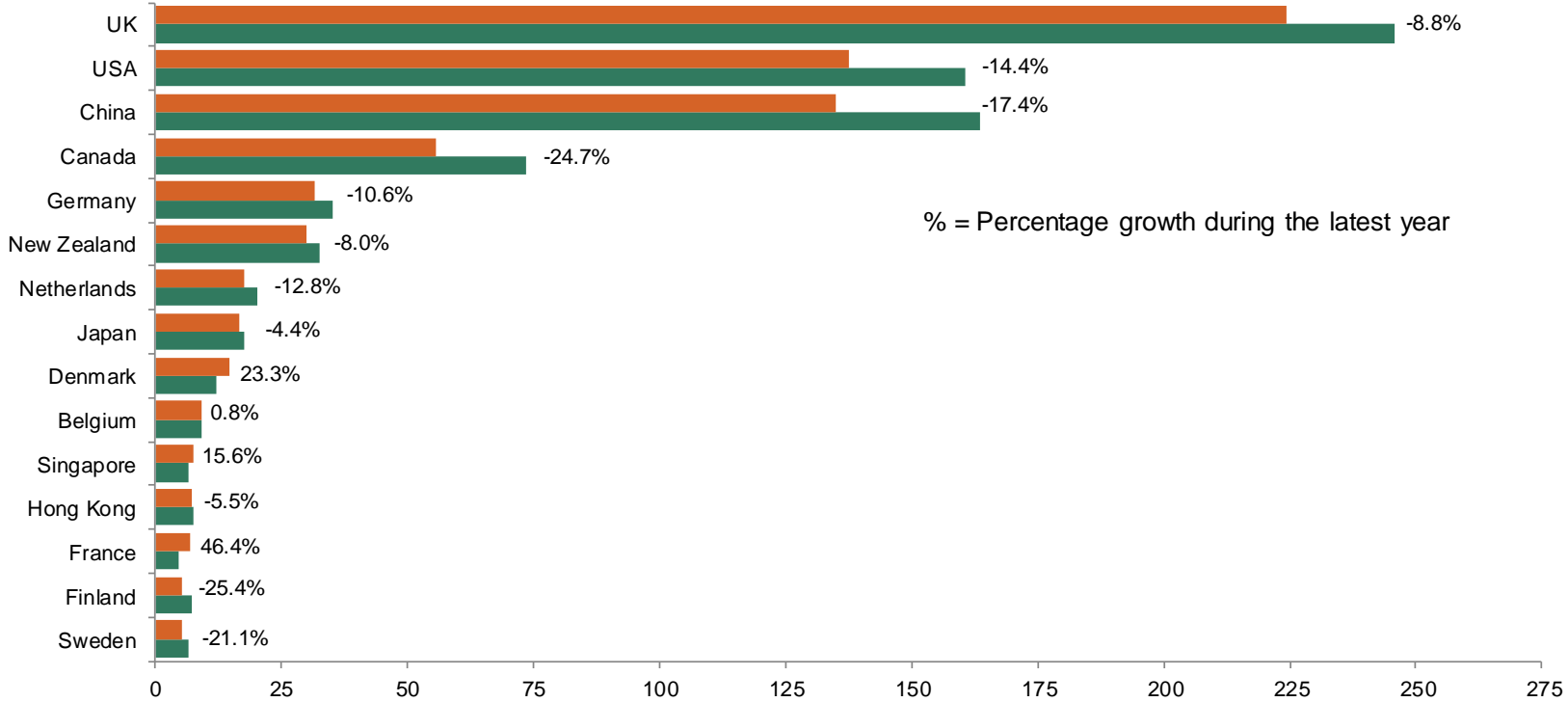
Exports by top 15 destinations

Value (million A\$) for MAT December 2019



Exports by top 15 destinations

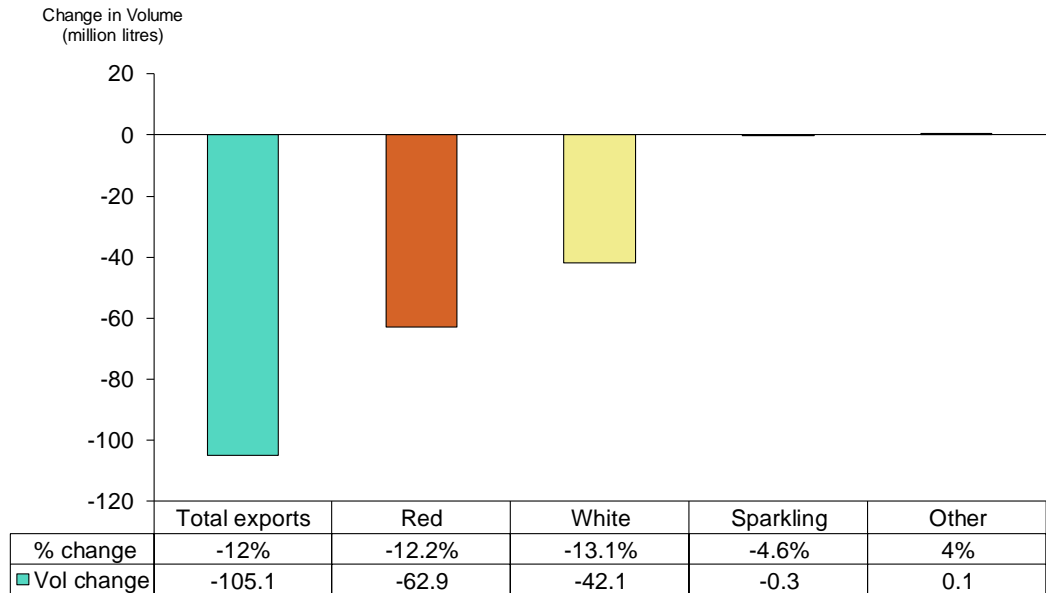
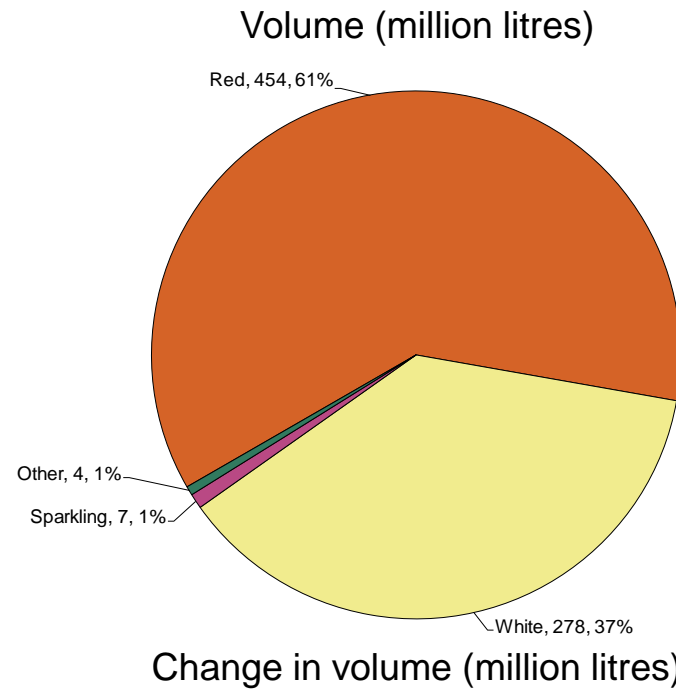
Volume (million litres) for MAT December 2019



	Sweden	Finland	France	Hong Kong	Singapore	Belgium	Denmark	Japan	Netherlands	New Zealand	Germany	Canada	China	USA	UK
2019	5.3	5.3	6.8	7.2	7.4	9.3	14.7	16.7	17.5	29.9	31.5	55.5	135.0	137.6	224.2
2018	6.7	7.1	4.6	7.6	6.4	9.2	11.9	17.5	20.1	32.5	35.3	73.7	163.5	160.7	245.7

Exports by colour/ wine style

MAT December 2019



Bottled wine exports report

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Bottled exports by top 15 GI regions	36
Bottled exports by price point	40

Bottled exports by price point and destination

Value ('000 A\$) for MAT December 2019

	\$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 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %
China	3,338	-58%	198,465	-9%	158,705	9%	59,406	5%	180,381	15%	254,568	24%	266,149	67%	1,121,011	18%
USA	6,198	-41%	263,730	8%	21,641	-3%	16,446	-11%	26,977	2%	11,911	13%	3,699	-11%	350,602	4%
UK	2,089	-62%	84,162	-21%	22,648	-11%	12,826	-1%	13,188	-19%	6,192	4%	1,986	3%	143,092	-18%
Canada	20	-98%	39,087	-13%	65,339	-7%	18,287	5%	21,742	-1%	2,385	-14%	614	-27%	147,476	-8%
New Zealand	825	-61%	36,303	10%	17,646	-4%	8,765	8%	4,808	-25%	1,223	-15%	1,044	-24%	70,615	0%
Netherlands	835	-82%	22,729	35%	6,441	20%	1,289	8%	1,032	10%	273	-10%	116	-33%	32,716	11%
Singapore	167	-51%	8,965	39%	7,153	22%	8,618	15%	14,061	-6%	33,067	16%	32,323	28%	104,354	18%
Japan	376	-42%	18,322	1%	5,230	0%	5,134	55%	6,202	13%	2,157	-19%	488	-89%	37,909	-5%
Hong Kong	13	-77%	9,296	-7%	7,531	-7%	3,636	-24%	21,595	21%	18,207	-15%	42,133	4%	102,410	0%
Sweden	270	-70%	10,448	-6%	3,282	1%	2,891	7%	1,839	27%	412	-24%	107	-12%	19,250	-4%
United Arab Emirates	20	-17%	6,621	9%	4,372	-14%	2,976	18%	3,437	6%	5,289	-9%	8,660	22%	31,374	5%
Thailand	116	-79%	8,652	30%	2,249	-30%	1,850	-11%	1,696	-36%	3,509	-25%	3,784	63%	21,856	-1%
Malaysia	48	-57%	4,705	1%	3,040	-38%	1,491	-7%	3,654	1%	11,124	6%	11,223	65%	35,285	10%
Philippines	23	-70%	8,543	54%	1,623	76%	443	76%	483	42%	704	61%	1,002	31%	12,821	54%
Korea, R	10	DNE	3,507	1%	5,185	-2%	1,855	-1%	4,016	-9%	2,142	26%	1,463	123%	18,178	4%
Ireland	691	-64%	5,393	26%	1,163	-8%	339	-25%	890	40%	213	34%	33	11%	8,722	0%
Germany	1,598	-42%	3,252	-38%	2,397	-17%	1,207	-33%	1,981	-42%	709	-24%	401	-21%	11,545	-34%
Taiwan	48	338%	4,609	9%	1,709	6%	677	22%	2,091	-17%	3,680	-23%	4,377	-23%	17,192	-11%
Denmark	488	-59%	2,839	-32%	1,514	-49%	1,544	-28%	3,107	18%	1,204	2%	402	20%	11,099	-24%
India	42	167%	6,101	-14%	285	-40%	35	-53%	152	-74%	32	-84%	6	-98%	6,653	-24%
Other	1,022	-21%	29,913	2%	21,053	8%	10,401	6%	17,467	-3%	8,487	10%	10,547	91%	98,888	8%
Total	18,239	-56%	775,643	-2%	360,207	1%	160,116	2%	330,799	7%	367,489	16%	390,557	46%	2,403,048	7%

Bottled exports by price point and destination

Volume ('000 litres) for MAT December 2019

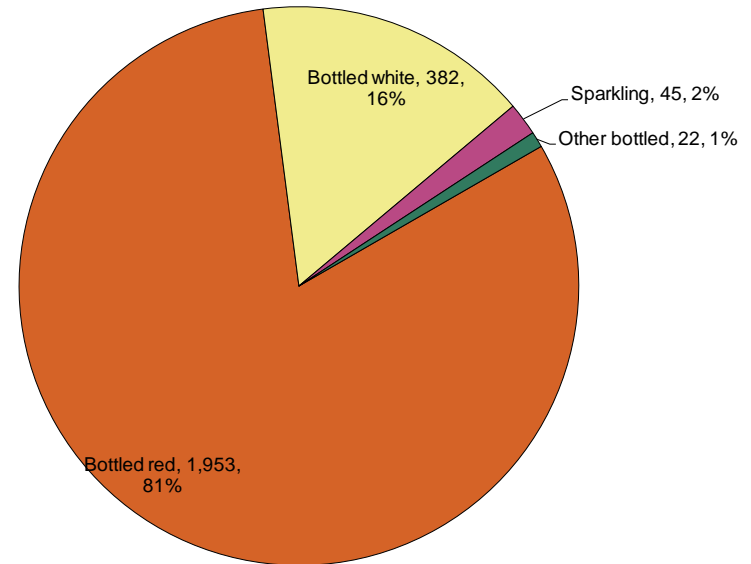
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10.00 to \$19.99		\$20.00 to \$49.99		\$50.00 and above		Total	
	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %
China	1,513	-60%	52,434	-12%	27,007	9%	6,819	5%	13,914	13%	8,916	14%	3,043	57%	113,645	-3%
USA	2,569	-42%	71,080	1%	3,683	-4%	1,818	-16%	2,101	4%	440	14%	39	-27%	81,729	-2%
UK	914	-61%	25,524	-23%	3,841	-10%	1,483	0%	1,067	-19%	214	4%	23	12%	33,067	-23%
Canada	11	-98%	10,432	-14%	10,644	-9%	2,147	5%	1,839	-2%	84	-12%	7	-27%	25,164	-11%
New Zealand	353	-61%	9,956	7%	2,921	-4%	1,021	8%	395	-25%	45	-16%	17	-23%	14,707	-1%
Netherlands	351	-85%	7,088	45%	1,067	17%	155	8%	81	12%	9	-18%	1	-21%	8,752	5%
Singapore	77	-53%	2,127	32%	1,216	29%	1,035	21%	1,103	-5%	1,260	9%	399	25%	7,217	16%
Japan	162	-46%	4,827	-3%	893	4%	589	53%	482	14%	81	-12%	6	-90%	7,039	-1%
Hong Kong	7	-83%	2,261	-11%	1,200	-8%	425	-24%	1,688	21%	636	-16%	312	-10%	6,529	-6%
Sweden	115	-70%	2,876	-8%	557	7%	324	7%	147	40%	13	-27%	1	13%	4,035	-10%
United Arab Emirates	9	-8%	1,654	7%	764	-9%	347	17%	281	6%	192	-12%	92	9%	3,340	2%
Thailand	54	-76%	2,363	33%	369	-27%	221	-9%	135	-40%	137	-29%	43	66%	3,321	4%
Malaysia	23	-54%	1,201	-3%	511	-39%	167	-10%	297	2%	440	-1%	141	106%	2,780	-11%
Philippines	11	-68%	2,174	50%	287	81%	50	68%	39	50%	26	56%	12	38%	2,599	51%
Korea, R	6	DNE	935	2%	891	-5%	211	-3%	286	-10%	72	32%	14	110%	2,415	-1%
Ireland	293	-68%	1,685	31%	203	-7%	39	-26%	78	35%	8	79%	0	22%	2,307	-9%
Germany	710	-44%	877	-43%	370	-27%	139	-35%	162	-35%	24	-28%	3	-27%	2,284	-40%
Taiwan	24	389%	1,114	8%	283	2%	79	21%	153	-18%	123	-30%	45	-23%	1,821	1%
Denmark	227	-64%	877	-29%	240	-50%	173	-30%	241	19%	42	3%	5	26%	1,803	-36%
India	20	149%	1,521	-23%	49	-42%	4	-55%	13	-73%	1	-82%	0	-100%	1,609	-25%
Other	458	-22%	8,202	3%	3,663	9%	1,210	6%	1,380	-2%	301	8%	126	95%	15,339	4%
Total	7,905	-58%	211,207	-6%	60,660	0%	18,455	2%	25,880	5%	13,065	8%	4,330	39%	341,502	-5%

Bottled exports by colour/wine style

Value

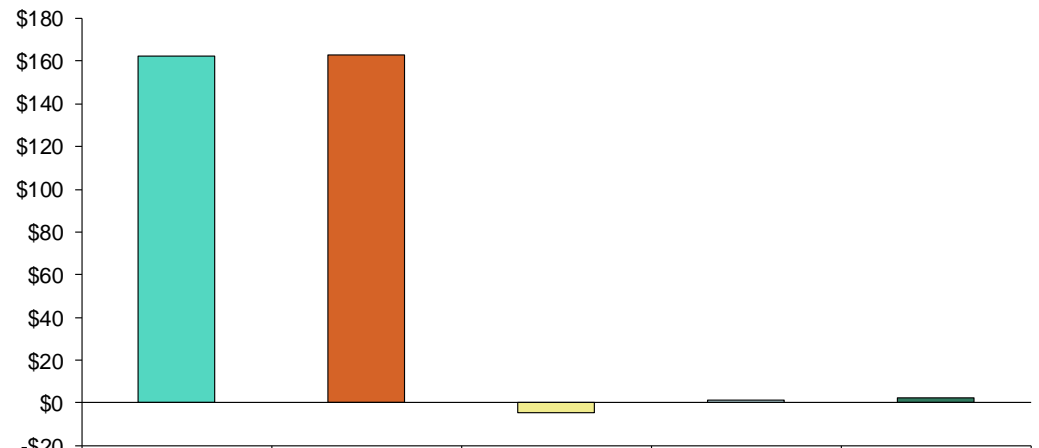
MAT December 2019

Value (A\$ million)



Change in value (A\$ million)

Change in Value (million AUD)



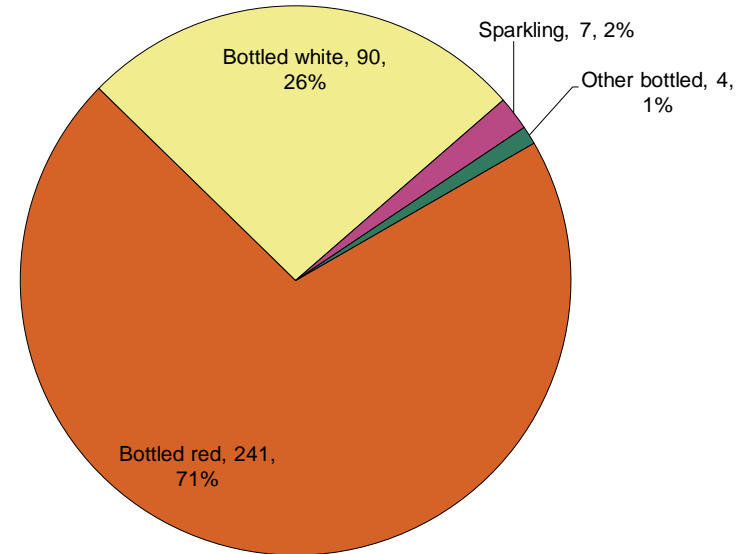
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	7.2%	9.1%	-1.2%	3.4%	13.0%
Vol change	162.3	163.1	-4.8	1.5	2.5

Bottled exports by colour/wine style

Volume

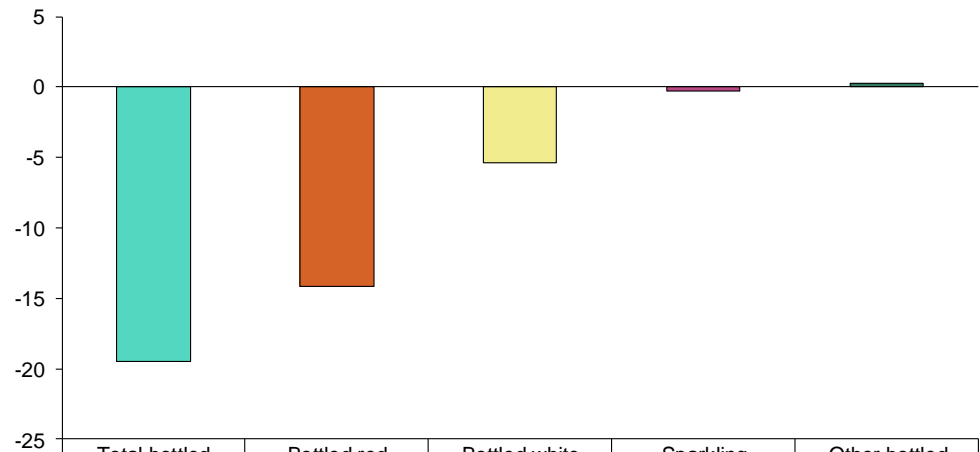
MAT December 2019

Volume (million litres)



Change in volume (million litres)

Change in Volume (million litres)



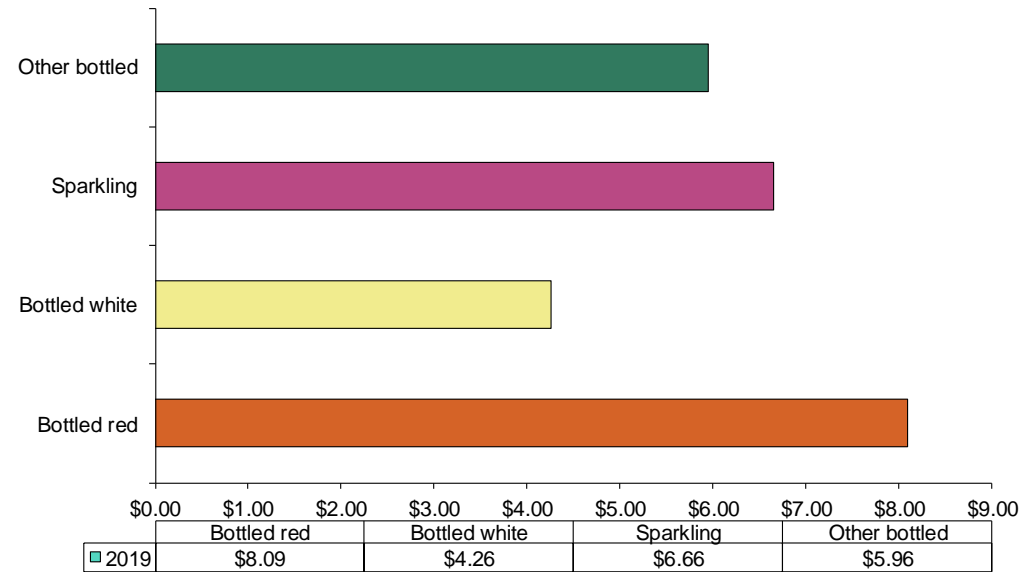
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	-5.4%	-5.6%	-5.6%	-3.9%	8.4%
Vol change	-19.5	-14.2	-5.3	-0.3	0.3

Bottled exports by colour/wine style

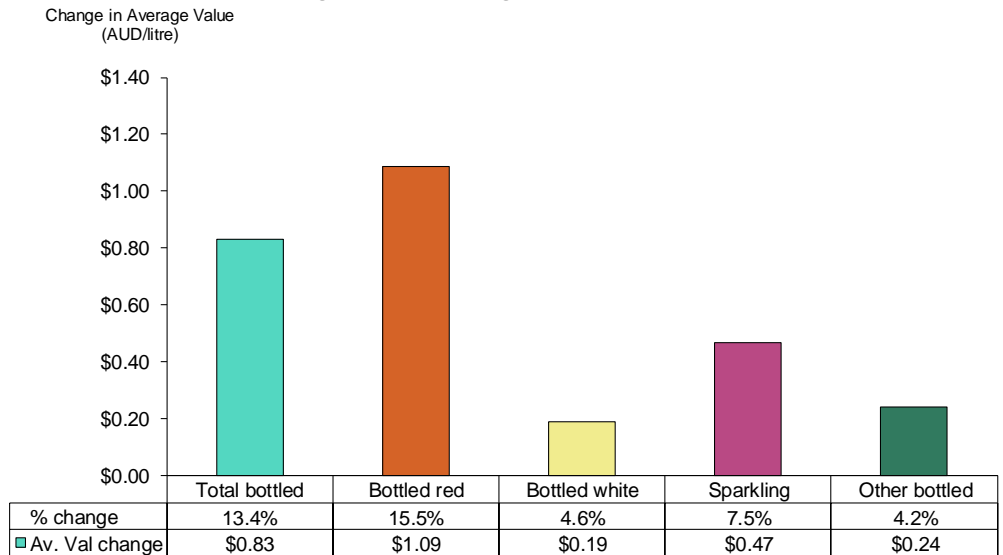
Average value

MAT December 2019

Average value (A\$ per litre)

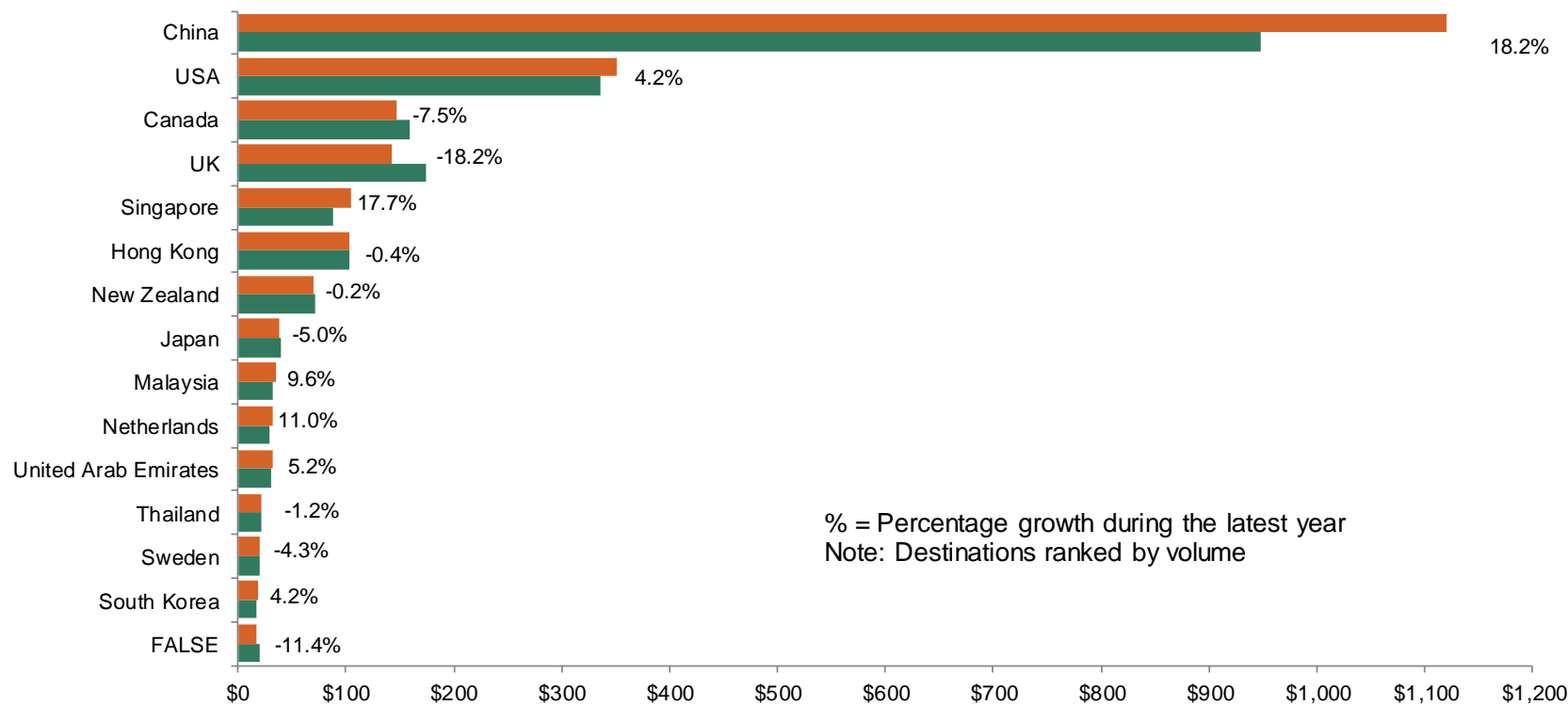


Change in average value (A\$ per litre)



Bottled exports by top 15 destinations

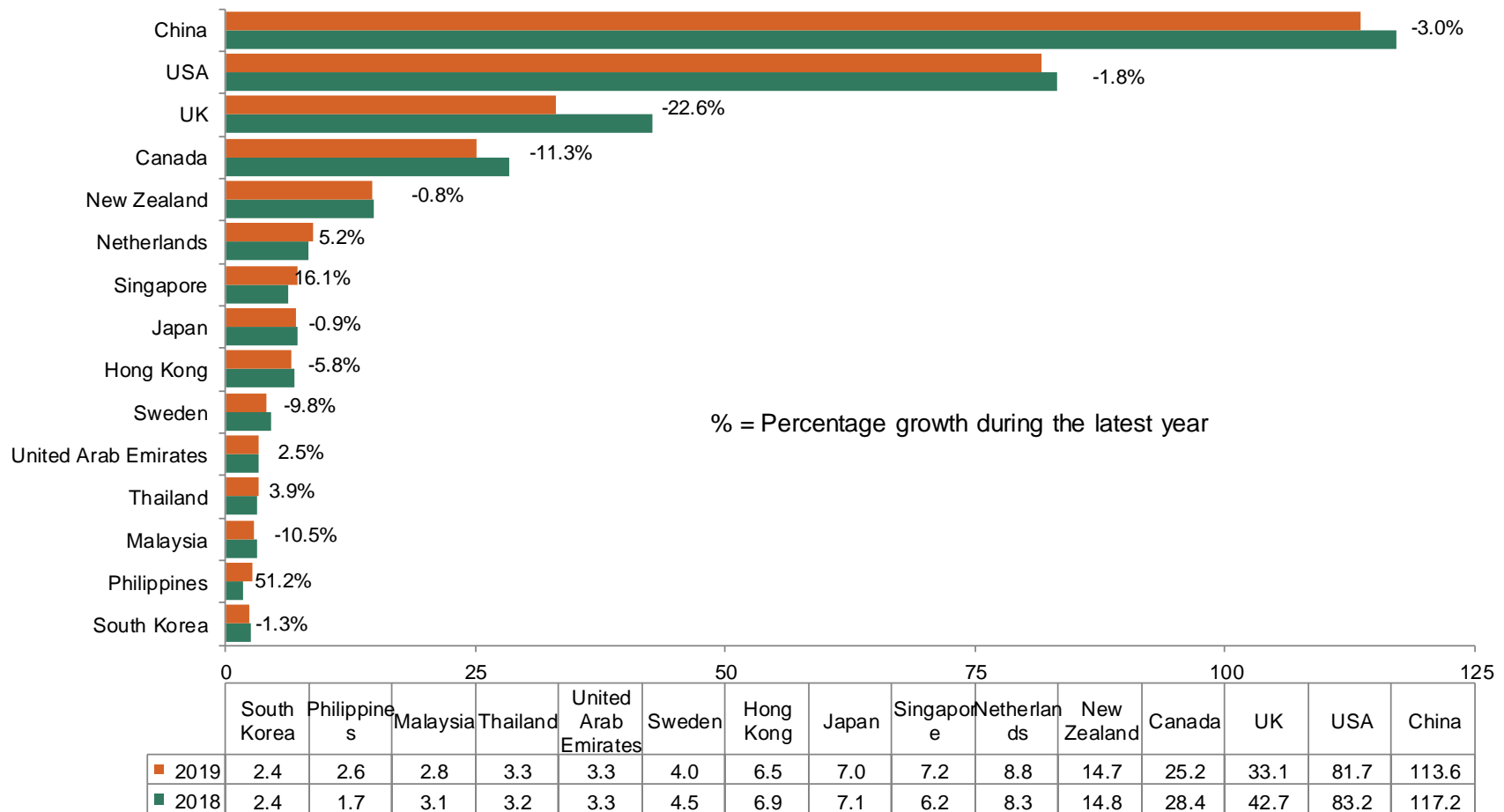
Value (million A\$) for MAT December 2019



	FALSE	South Korea	Sweden	Thailand	United Arab Emirates	Netherlands	Malaysia	Japan	New Zealand	Hong Kong	Singapore	UK	Canada	USA	China
2019	17.2	18.2	19.3	21.9	31.4	32.7	35.3	37.9	70.6	102.4	104.4	143.1	147.5	350.6	1121.0
2018	19.4	17.4	20.1	22.1	29.8	29.5	32.2	39.9	70.8	102.8	88.7	174.9	159.5	336.4	948.1

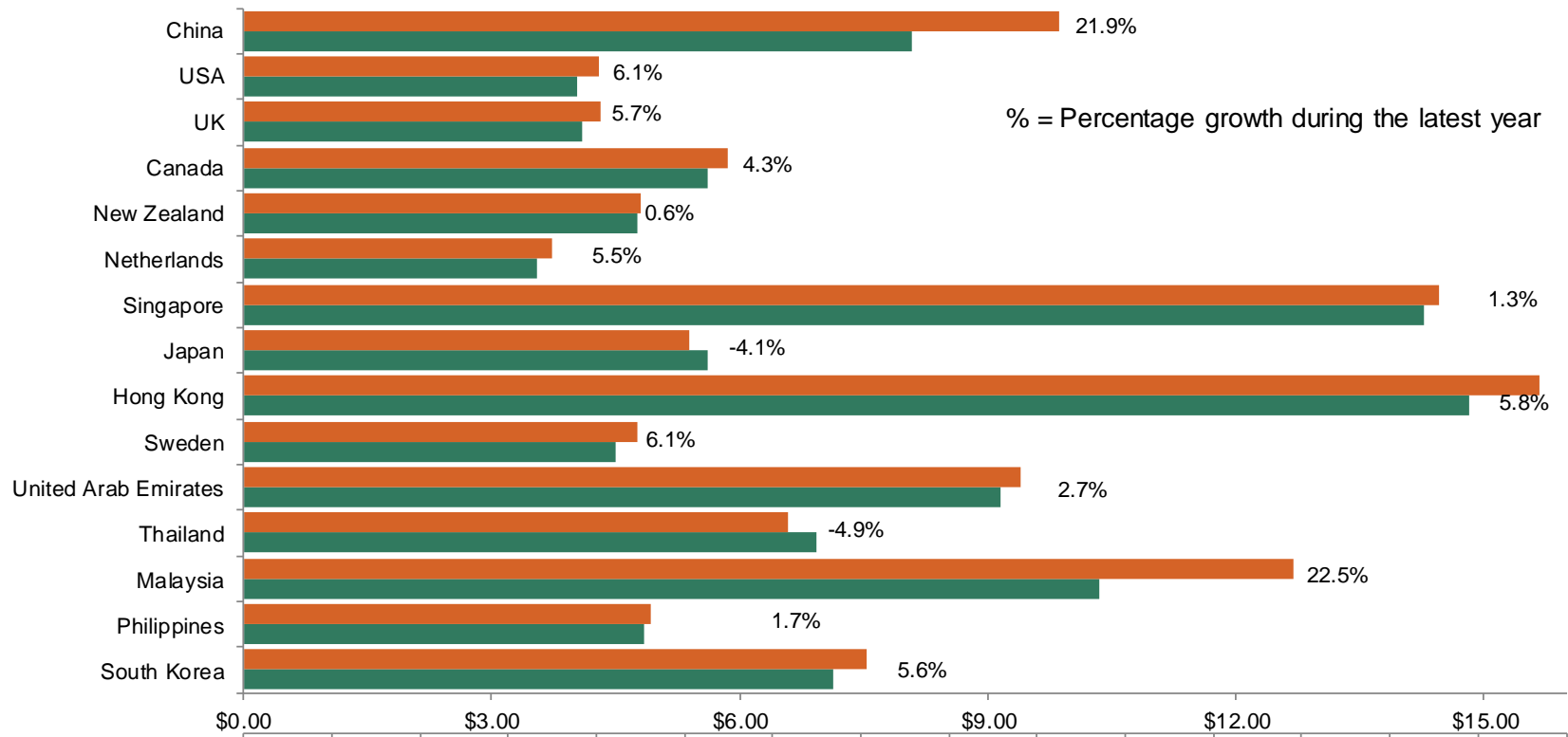
Bottled exports by top 15 destinations

Volume (million litres) for MAT December 2019



Bottled exports by top 15 destinations

Average value (A\$ per litre) for MAT December 2019



	South Korea	Philippines	Malaysia	Thailand	United Arab Emirates	Sweden	Hong Kong	Japan	Singapore	Netherlands	New Zealand	Canada	UK	USA	China
2019	\$7.53	\$4.93	\$12.69	\$6.58	\$9.39	\$4.77	\$15.69	\$5.39	\$14.46	\$3.74	\$4.80	\$5.86	\$4.33	\$4.29	\$9.86
2018	\$7.13	\$4.85	\$10.36	\$6.92	\$9.15	\$4.50	\$14.82	\$5.62	\$14.27	\$3.54	\$4.77	\$5.62	\$4.09	\$4.04	\$8.09

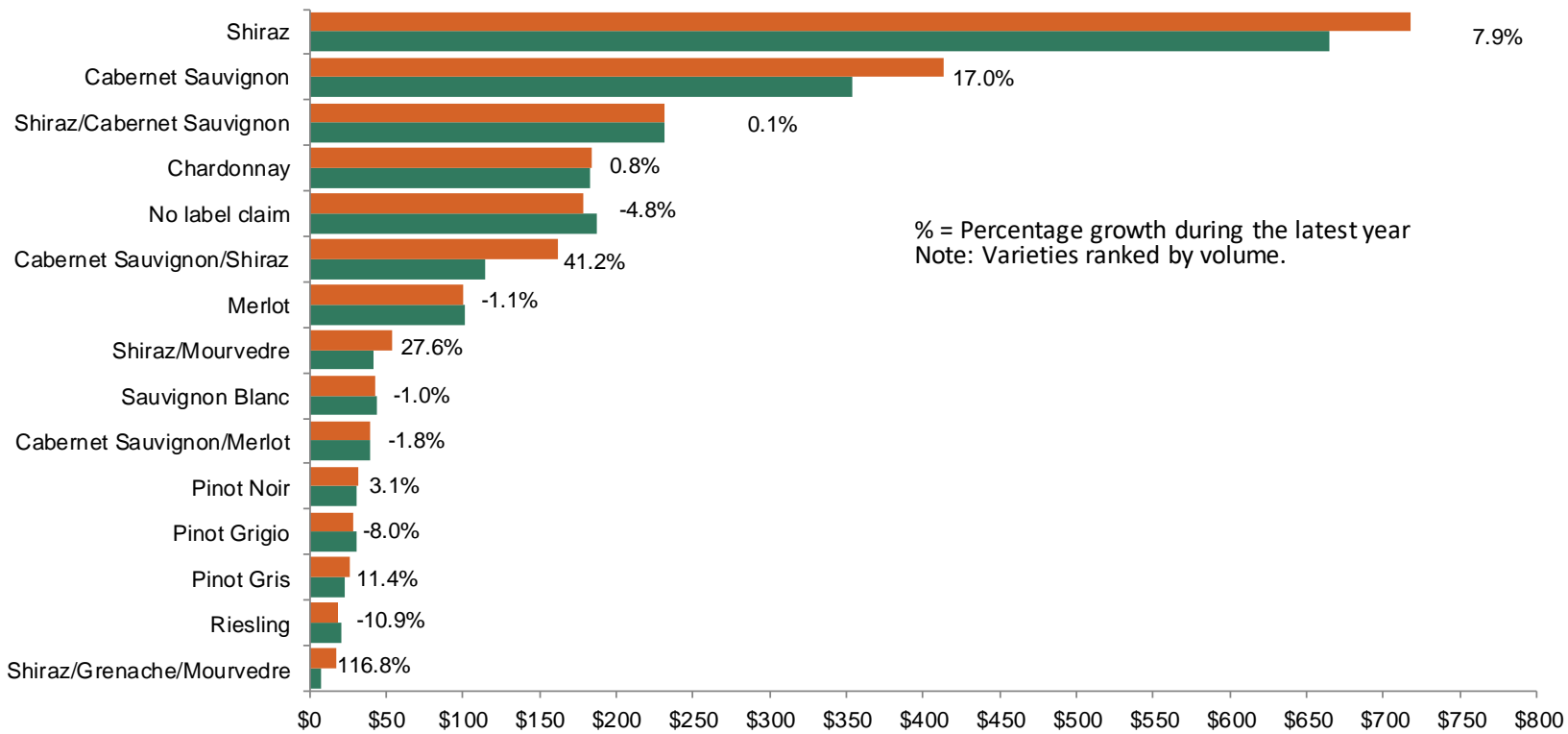
Bottled exports by top 15 variety label claims

MAT December 2019

Top 15 variety label claims	Volume (million litres)		Value (A\$ million FOB)		Average value (\$A per litre FOB)	
	2019	Change	2019	Change	2019	Change
Shiraz	83.34	-7%	717.73	8%	8.61	16%
Cabernet Sauvignon	50.88	-1%	413.88	17%	8.13	18%
Chardonnay	44.26	-4%	184.31	1%	4.16	6%
No label claim	35.70	-8%	178.37	-5%	5.00	5%
Shiraz/Cabernet Sauvignon	31.03	-6%	231.24	0%	7.45	3%
Merlot	22.80	-11%	100.62	-1%	4.41	20%
Sauvignon Blanc	11.66	-5%	43.04	-1%	3.69	11%
Cabernet Sauvignon/Merlot	7.96	-8%	39.22	-2%	4.93	9%
Pinot Grigio	7.19	-8%	28.71	-8%	4.00	5%
Pinot Gris	7.12	3%	25.95	11%	3.65	6%
Cabernet Sauvignon/Shiraz	6.17	18%	161.94	41%	26.25	11%
Pinot Noir	4.72	-7%	31.57	3%	6.69	0%
Riesling	2.97	-16%	18.88	-11%	6.35	8%
Chardonnay/Pinot Noir	2.58	-14%	14.51	-9%	5.63	6%
Shiraz/Mourvedre	2.33	17%	53.86	28%	23.16	66%

Bottled exports by top 15 variety label claims

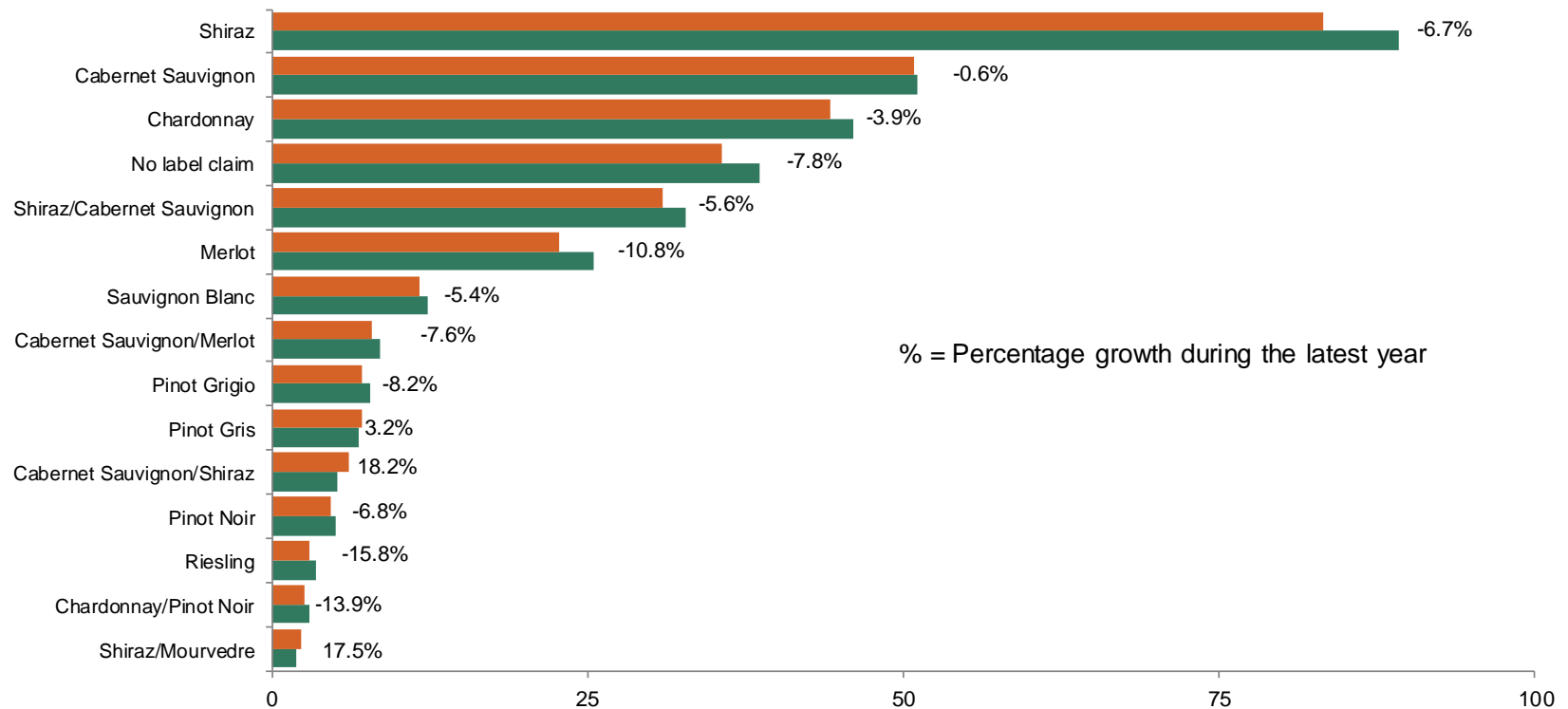
Value (million A\$) for MAT December 2019



% = Percentage growth during the latest year
Note: Varieties ranked by volume.

Bottled exports by top 15 variety label claims

Volume (million litres) for MAT December 2019

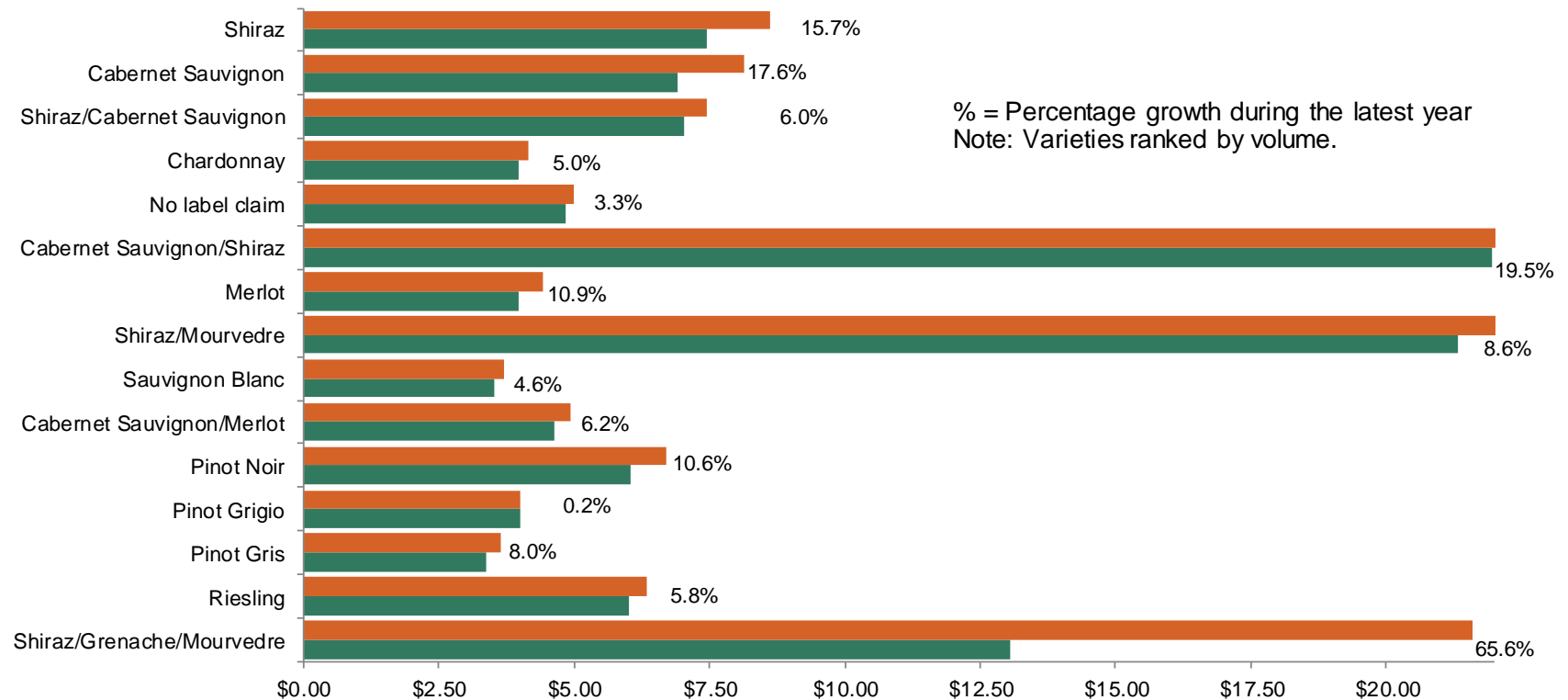


2019

2018

Bottled exports by top 15 variety label claims

Average Value (A\$ per litre) for MAT December 2019



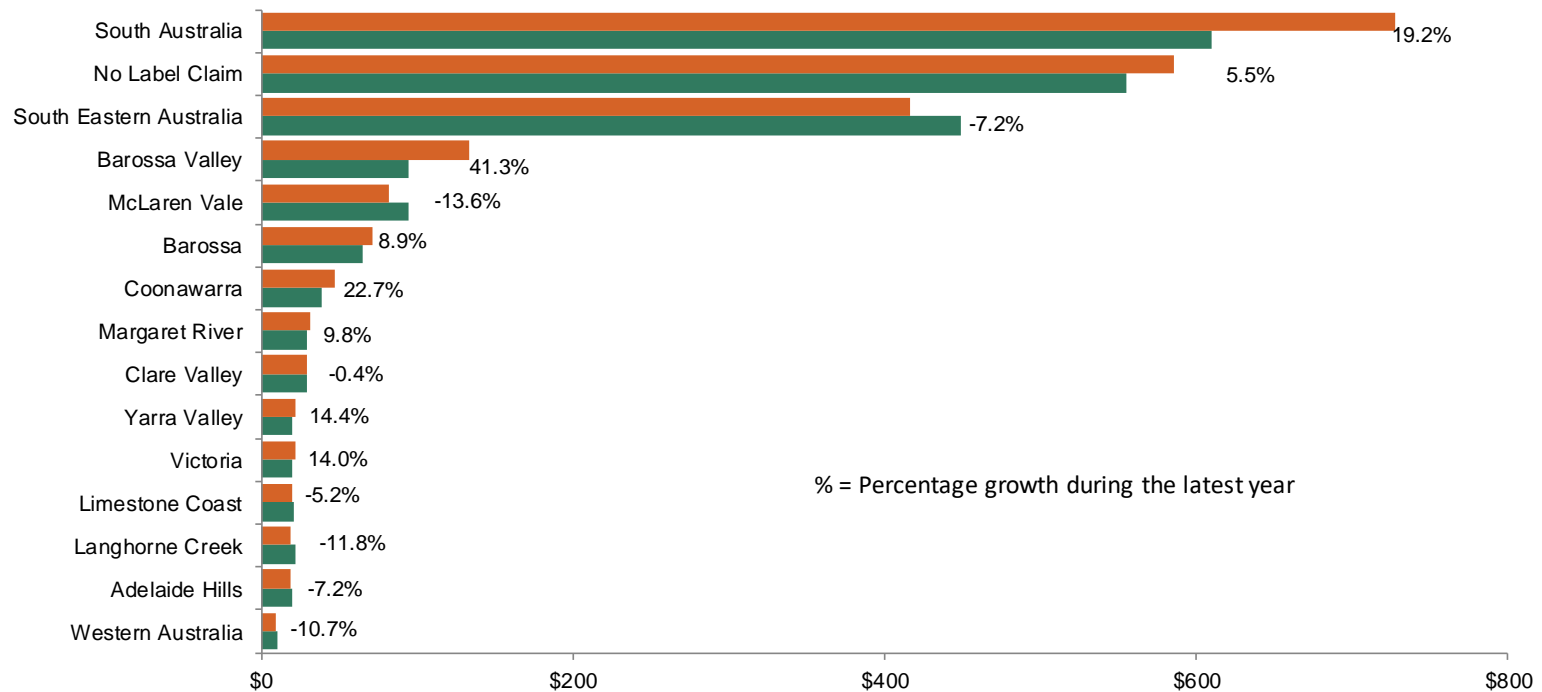
Bottled exports by top 15 GI region label claims

MAT December 2019

Top 15 GI label claims	Volume (million litres)		Value (A\$ million FOB)		Average value (\$A per litre FOB)	
	2019	Change	2019	Change	2019	Change
South Australia	66.01	6%	728.10	19%	11.03	13%
No Label Claim	108.90	-2%	585.87	6%	5.38	8%
South Eastern Australia	109.52	-14%	416.78	-7%	3.81	7%
Barossa Valley	6.06	21%	133.45	41%	22.02	17%
McLaren Vale	7.15	-11%	81.85	-14%	11.44	-3%
Barossa	5.34	-5%	71.18	9%	13.32	15%
Coonawarra	3.21	3%	47.43	23%	14.79	19%
Margaret River	2.51	6%	31.57	10%	12.57	4%
Clare Valley	3.17	-11%	29.51	0%	9.32	12%
Yarra Valley	1.27	-1%	22.07	14%	17.37	16%
Victoria	3.36	14%	21.89	14%	6.51	0%
Limestone Coast	2.92	-14%	19.92	-5%	6.83	10%
Langhorne Creek	2.26	0%	18.82	-12%	8.31	-12%
Adelaide Hills	1.75	-10%	18.74	-7%	10.70	3%
Western Australia	1.31	-12%	8.89	-11%	6.79	2%

Bottled exports by top 15 GI region label claims

Value (million A\$) for MAT December 2019



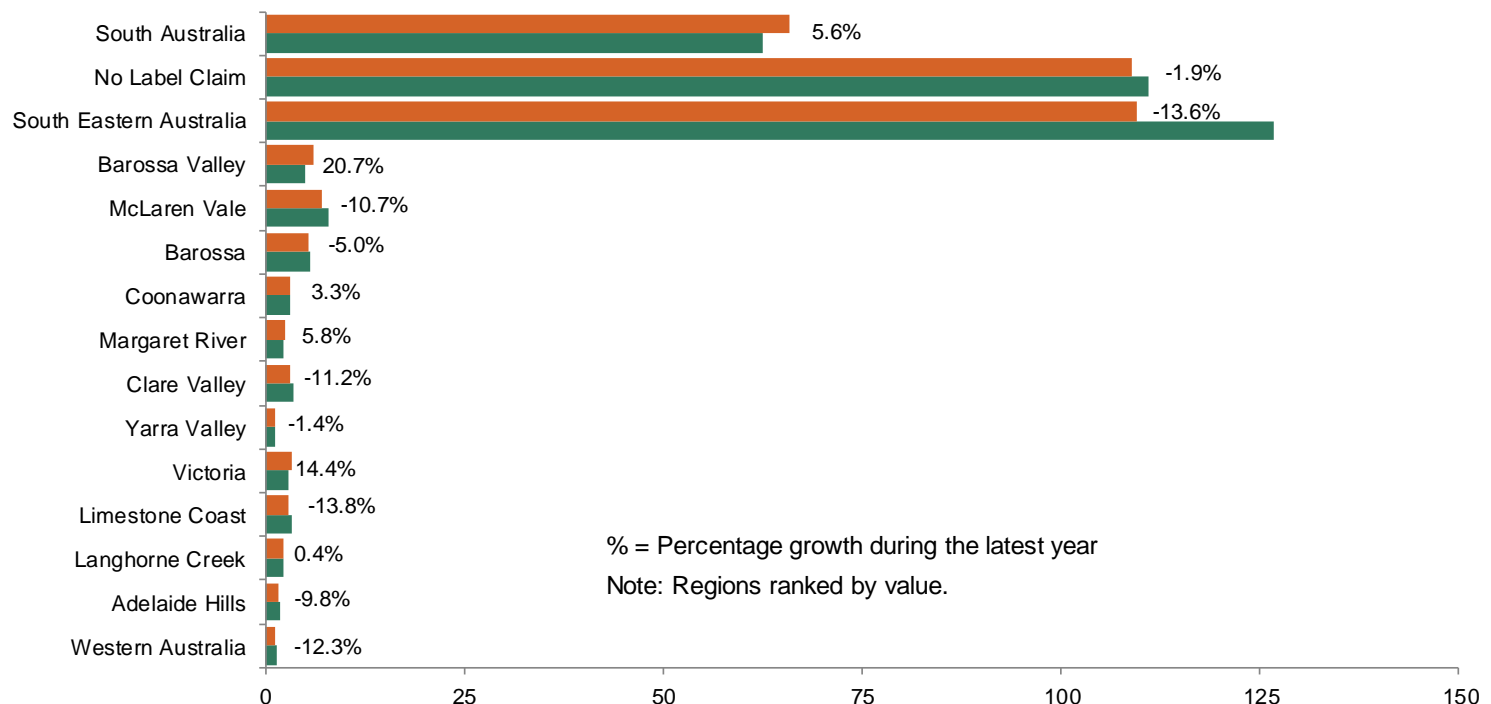
% = Percentage growth during the latest year

■ 2019

■ 2018

Bottled exports by top 15 GI region label claims

Volume (million litres) for MAT December 2019

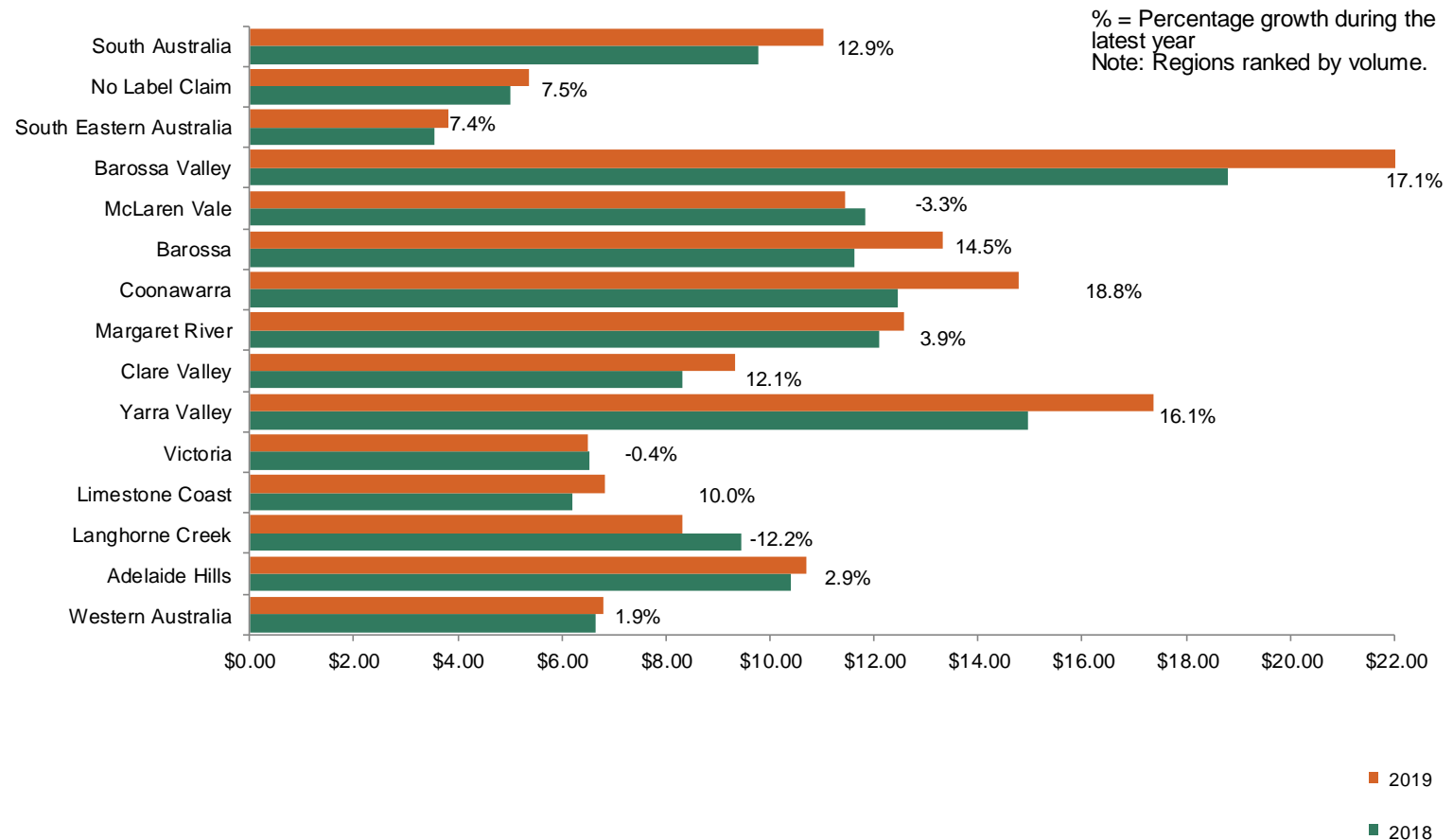


2019

2018

Bottled exports by top 15 GI region label claims

Average Value (A\$ per litre) for MAT December 2019

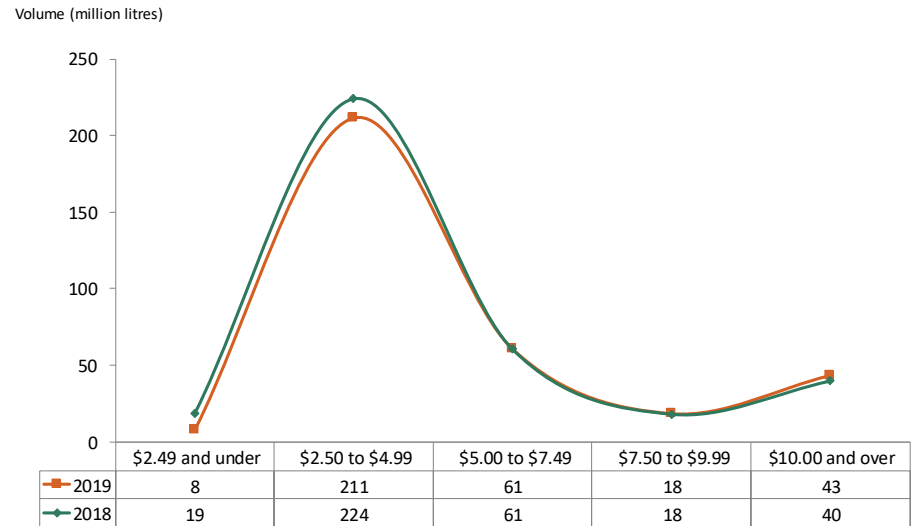


Bottled exports by price point

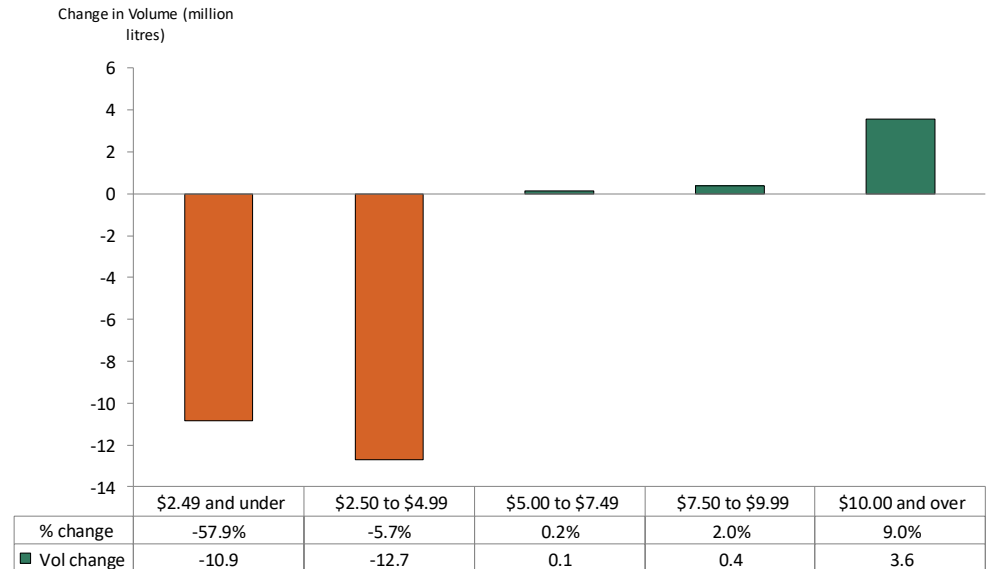
Volume

MAT December 2019

Volume (million litres)



Change in volume (million litres)



Unpackaged wine exports report

Unpackaged exports by price point and destination	42
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Unpackaged wine exports by price point and destination

Value ('000 A\$) for MAT December 2019

	\$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 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %	MAT December 2019 ('000 AUD)	Change %
UK	69	175%	75,300	-8%	106,353	-2%	14,904	30%	2,169	-14%	10,398	10%	209,194	-2%
USA	119	237%	8,701	-78%	41,386	50%	15,784	6%	830	-63%	2,051	-35%	68,872	-21%
China	-	na	-	-100%	10,679	-68%	8,666	16%	1,717	-83%	29,794	-6%	50,856	-40%
Germany	-	na	8,392	-33%	20,578	8%	4,092	414%	1,344	72%	1,885	-27%	36,291	1%
Canada	-	na	6,302	-47%	24,538	-28%	3,449	269%	552	146%	-	na	34,842	-26%
New Zealand	0	-100%	4,845	-30%	7,392	4%	1,249	69%	267	374%	5,520	-14%	19,273	-9%
Denmark	-	-100%	2,247	-3%	9,436	40%	5,024	443%	171	-11%	195	-15%	17,073	64%
Netherlands	-	na	1,781	-66%	7,099	15%	1,326	57%	53	0%	-	na	10,259	-16%
France	-	na	566	-41%	2,670	-11%	5,031	361%	288	186%	633	688%	9,187	75%
Japan	-	na	1,123	-54%	5,655	7%	1,543	39%	187	na	415	27%	8,923	-2%
Belgium	-	na	2,180	-46%	5,014	43%	1,462	420%	236	na	1	na	8,893	13%
Finland	-	na	45	-98%	2,840	-17%	2,055	87%	341	-14%	803	99%	6,083	-16%
Sweden	-	na	-	-100%	314	-60%	700	-48%	348	-52%	1,037	6%	2,399	-39%
Switzerland	-	na	66	-92%	614	-1%	294	691%	-	-100%	340	na	1,315	-18%
Norway	-	na	-	na	981	18%	147	na	-	na	-	-100%	1,128	1%
Poland	-	na	-	na	61	-73%	560	47%	44	na	265	296%	930	37%
Thailand	-	na	42	-92%	570	-58%	230	6%	-	na	-	na	841	-60%
Spain	-	na	59	-93%	123	-74%	217	-14%	52	-52%	247	312%	697	-60%
Other	-	na	210	-90%	472	22%	326	-21%	48	-73%	172	-60%	1,229	-65%
Total	188	6%	111,858	-36%	246,775	-6%	67,061	51%	8,648	-52%	53,756	-4%	488,286	-12%

Unpackaged wine exports by price point and destination

Volume ('000 litres) for MAT December 2019

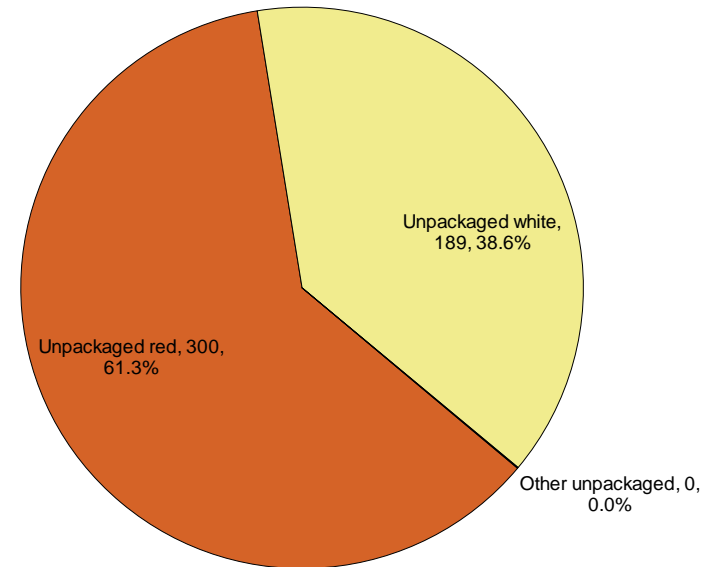
	\$0.50 and under		\$0.50 to \$1.00		\$1.00 to \$1.50		\$1.50 to \$2.00		\$2.00 to \$2.50		\$2.50 and above		Total	
	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %	MAT December 2019 ('000 Litres)	Change %
UK	357	400%	90,662	-8%	86,946	-7%	9,262	35%	1,009	-14%	2,884	7%	191,118	-6%
USA	264	246%	9,630	-78%	35,442	61%	9,639	4%	359	-68%	521	-25%	55,854	-28%
Canada	-	na	7,173	-49%	20,489	-31%	2,129	283%	269	145%	-	na	30,060	-33%
Germany	-	na	9,017	-36%	16,396	5%	2,616	419%	672	75%	552	-36%	29,253	-7%
China	-	na	-	-100%	8,422	-70%	5,131	11%	768	-83%	6,528	2%	20,848	-55%
New Zealand	24	-91%	6,648	-28%	6,078	3%	792	78%	120	399%	988	-19%	14,649	-15%
Denmark	-	-100%	2,493	-6%	7,273	28%	2,987	449%	72	-13%	74	54%	12,898	42%
Netherlands	-	na	1,957	-68%	5,938	16%	870	58%	24	0%	-	na	8,789	-26%
Belgium	-	na	2,589	-47%	4,353	44%	909	430%	96	na	0	na	7,947	-1%
Japan	-	na	1,172	-56%	5,090	10%	947	48%	89	na	120	25%	7,418	-8%
France	-	na	577	-47%	2,437	-5%	3,253	397%	144	200%	205	920%	6,616	52%
Finland	-	na	52	-97%	2,471	-13%	1,320	113%	150	-14%	186	87%	4,179	-28%
Sweden	-	na	-	-100%	286	-54%	392	-48%	168	-53%	384	-2%	1,230	-44%
Switzerland	-	na	72	-94%	504	5%	192	700%	-	-100%	72	na	839	-51%
Norway	-	na	-	na	672	4%	96	na	-	na	-	-100%	768	3%
Thailand	-	na	48	-92%	456	-58%	144	0%	-	na	-	na	648	-64%
Poland	-	na	-	na	48	-71%	336	40%	22	na	96	300%	502	16%
Spain	-	na	72	-94%	98	-74%	124	-14%	26	-50%	98	308%	418	-76%
Other	-	na	288	-90%	357	4%	197	-18%	24	-69%	57	-46%	924	-74%
Total	645	35%	132,449	-36%	203,755	-9%	41,334	53%	4,011	-51%	12,764	0%	394,958	-18%

Unpackaged exports by colour/wine style

Value

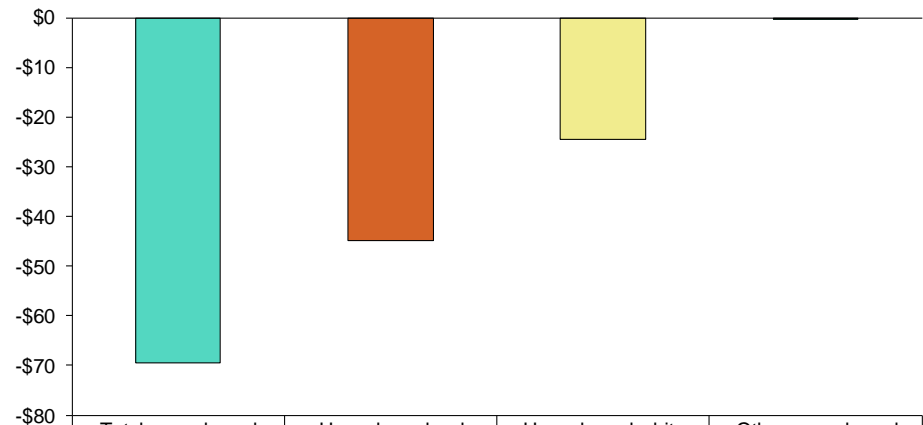
MAT December 2019

Value (A\$ million)



Change in Value (A\$ million)

Change in Value (million AUD)



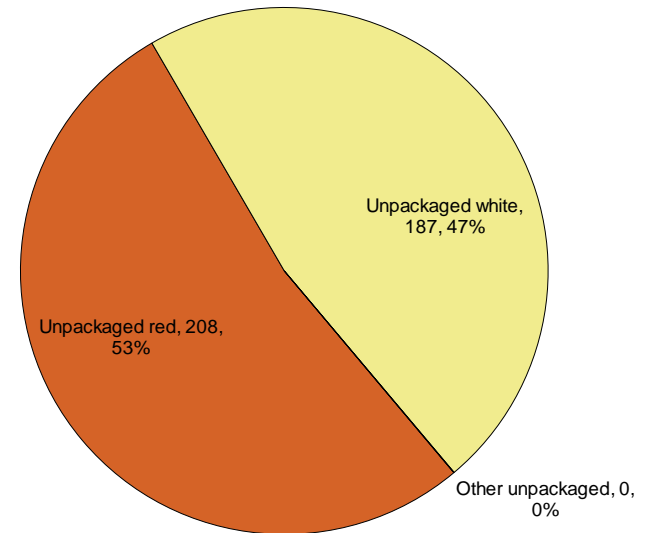
	Total unpackaged	Unpackaged red	Unpackaged white	Other unpackaged
% change	-12.5%	-13.0%	-11.5%	-28.2%
Val change	-69.5	-44.9	-24.5	-0.1

Unpackaged exports by colour/wine style

Volume

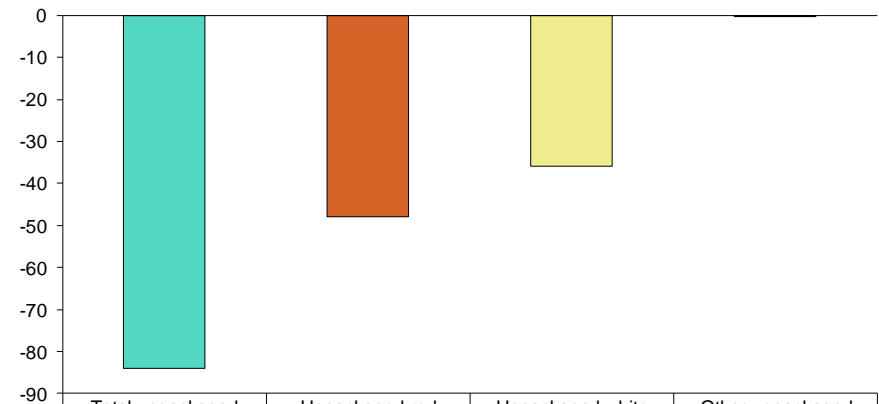
MAT December 2019

Volume (million litres)



Change in Volume (million litres)

Change in Volume (million litres)



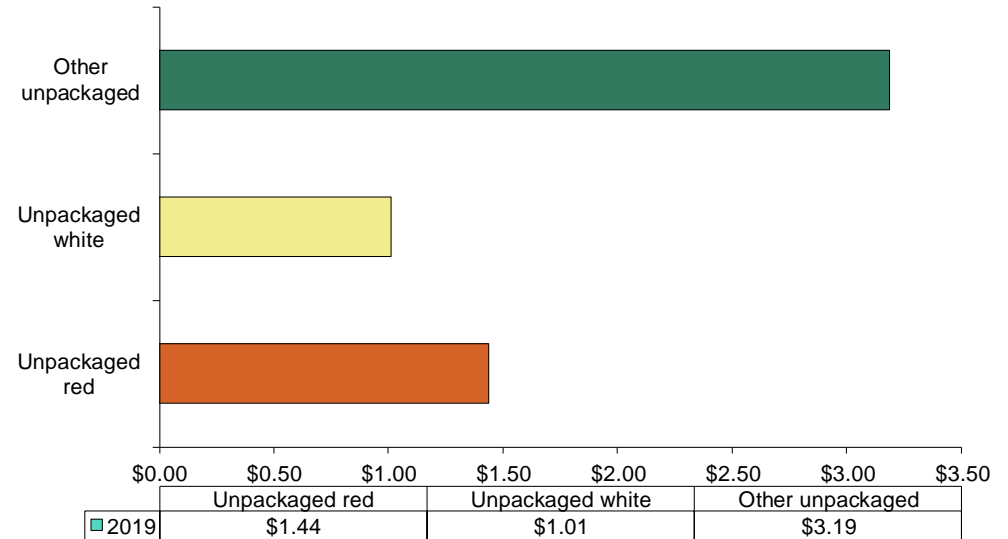
	Total unpackaged	Unpackaged red	Unpackaged white	Other unpackaged
% change	-18%	-19%	-16%	-53%
Vol change	-84.0	-48.0	-35.9	-0.1

Unpackaged exports by colour/wine style

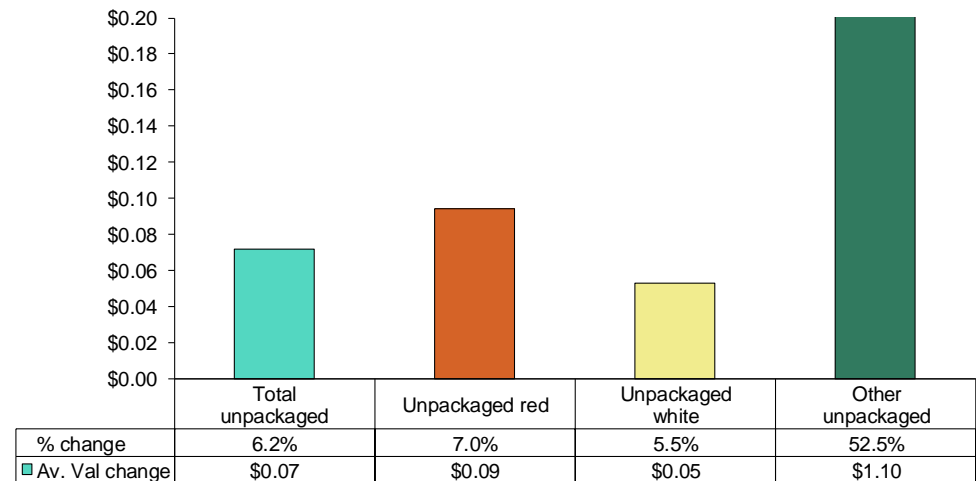
Average value

MAT December 2019

Average value (A\$ per litre)

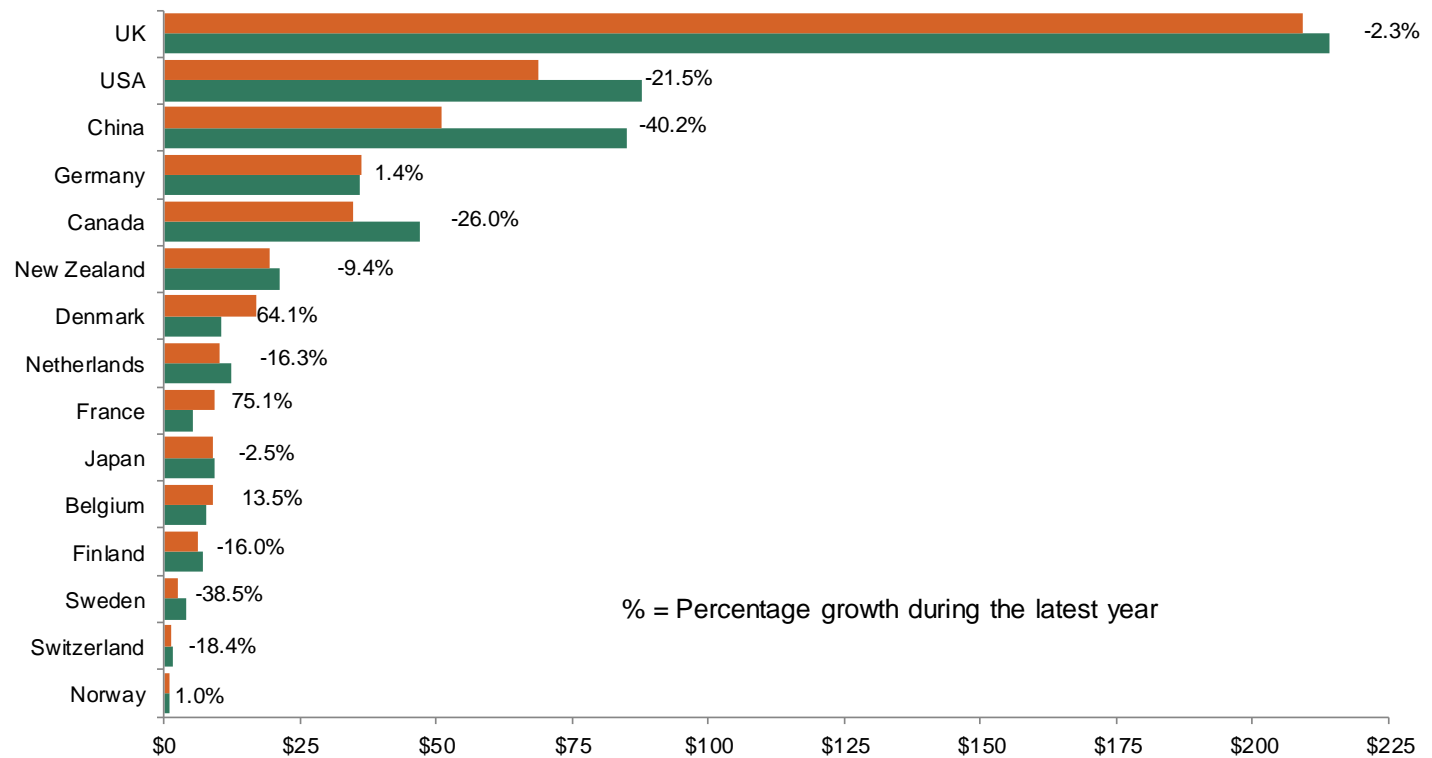


Change in average value (A\$ per litre)



Unpackaged exports by top 15 destinations

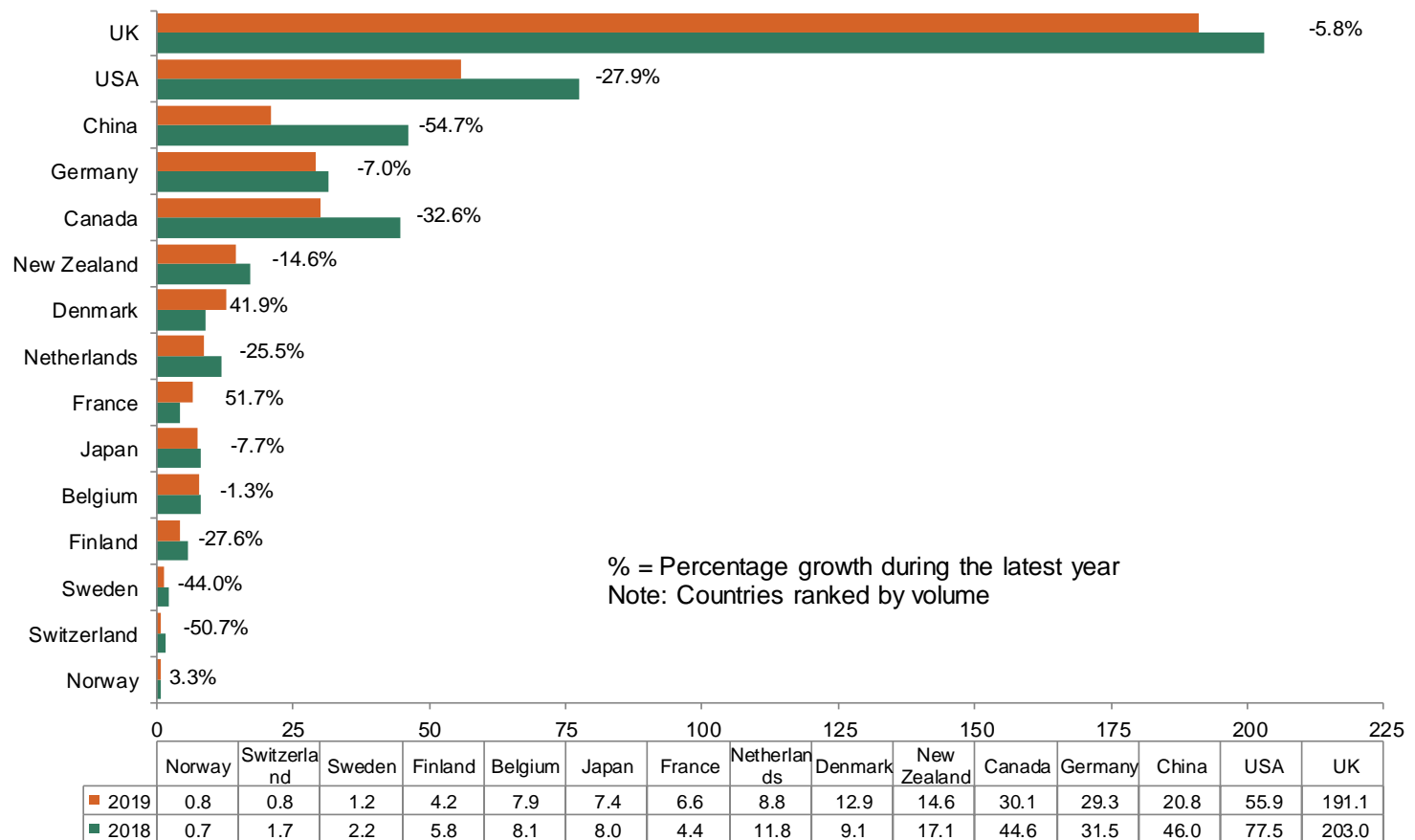
Value (million A\$) for MAT December 2019



	Norway	Switzerland	Sweden	Finland	Belgium	Japan	France	Netherlands	Denmark	New Zealand	Canada	Germany	China	USA	UK
2019	1.1	1.3	2.4	6.1	8.9	8.9	9.2	10.3	17.1	19.3	34.8	36.3	50.9	68.9	209.2
2018	1.1	1.6	3.9	7.2	7.8	9.2	5.2	12.3	10.4	21.3	47.1	35.8	85.0	87.7	214.1

Unpackaged exports by top 15 destinations

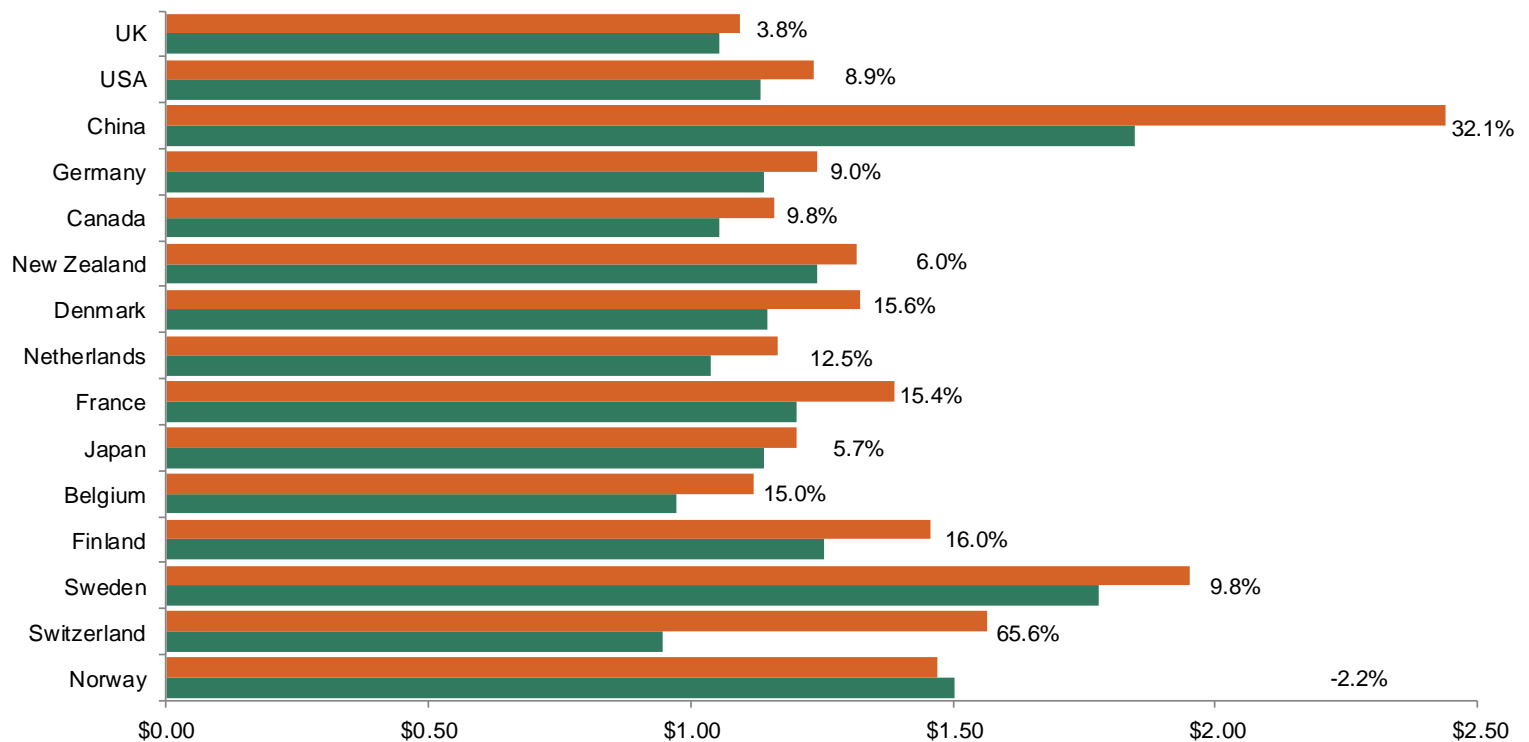
Volume (million litres) for MAT December 2019



Unpackaged exports by top 15 destinations

Average Value (A\$ per litre) for MAT December 2019

% = Percentage growth during the last year
Note: Destinations ranked by value



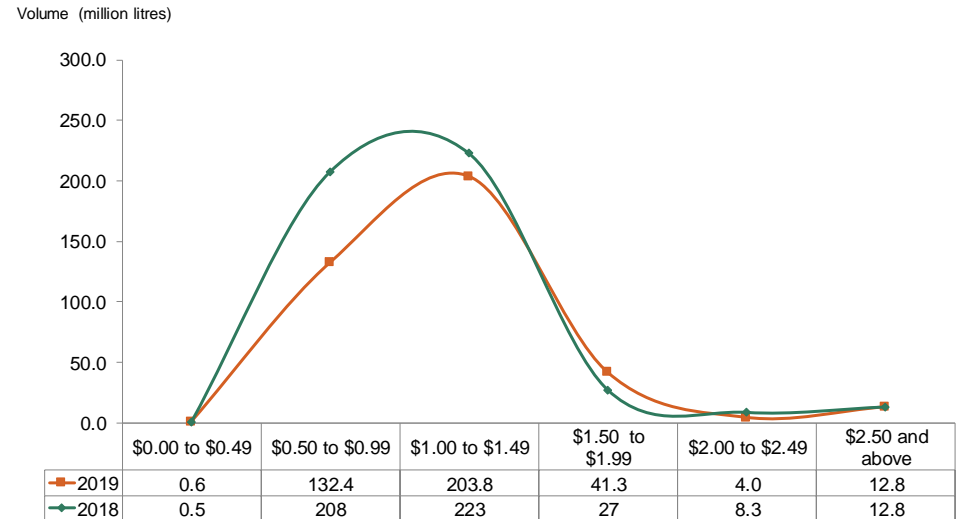
	Norway	Switzerland	Sweden	Finland	Belgium	Japan	France	Netherlands	Denmark	New Zealand	Canada	Germany	China	USA	UK
2019	\$1.47	\$1.57	\$1.95	\$1.46	\$1.12	\$1.20	\$1.39	\$1.17	\$1.32	\$1.32	\$1.16	\$1.24	\$2.44	\$1.23	\$1.09
2018	\$1.50	\$0.95	\$1.78	\$1.26	\$0.97	\$1.14	\$1.20	\$1.04	\$1.14	\$1.24	\$1.06	\$1.14	\$1.85	\$1.13	\$1.05

Unpackaged exports by price point

Volume

MAT December 2019

Volume (million litres)



Change in Volume (million litres)



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.

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- **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 12 months compared to the preceding 12 months.
- **Formula:** $\% \text{ Change} = ((\text{current MAT} - \text{preceding MAT}) / \text{preceding MAT}) \times 100$
- **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.
- **Unpackaged:** 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