Wine Australia providing insights on Australian Wine

Export Report

Moving Annual Total (MAT)

To June 2018

Contents

Summary Report

Executive summary

- Highest export value growth rate in 15 years
- Record export volume
- Record volume and value of bulk exports
- Record average value of bottled wine
- Red wines driving growth
- Some positive signs in Europe

Commentary

Overview

In the year ended June 2018, Australian wine exports increased by 20 per cent in value to $2.76 billion, the highest growth rate in 15 years. Volume grew by 10 per cent to record 852 million litres, or 95 million 9 litre case equivalents. The average value per litre increased by 9 per cent to $3.24, the highest level in almost a decade.

Bottle vs bulk

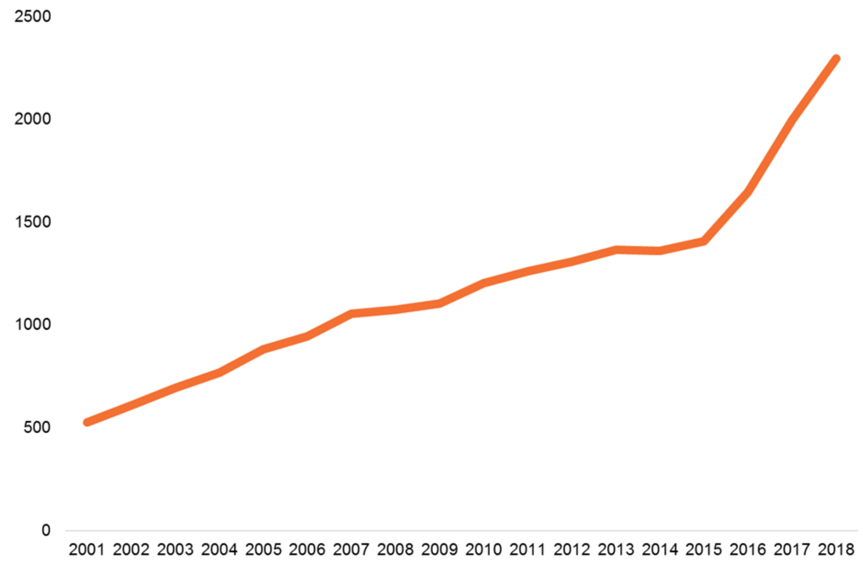
The value of wine shipped in glass bottles increased by 19 per cent to $2.2 billion, while volume increased by 8 per cent to 376 million litres (42 9 litre case equivalents). Value growth outpaced volume growth resulting in a 10 per cent increase in the average value per litre to a record $5.94 per litre. The average value of bottled exports increased to 69 of Australia's 127 export destinations, with demand for premium Australian wine in Northeast Asia being the biggest contributor to the increase.

Global supply constraints due to historically low vintages in Europe helped drive the volume and value of Australian wine exports in bulk containers to record figures. Value increased by 22 per cent to $504 million, while volume increased by 11 per cent to 467 million litres (52 9 litre case equivalents). The average value of bulk exports increased by 10 per cent to $1.08. Of the 29 Australian bulk wine destinations, 21 recorded an increase in average value, with the United Kingdom (UK), Canada, and Germany being amongst the strongest drivers. Also pushing this trend towards shipping in bulk containers is the increased demand on businesses to be more environmentally sustainable. Shipping in bulk containers allows for a higher volume of wine to be exported per ship, reducing carbon emissions and costs.

Exporter performance

There were 2298 active exporters, shipping 23,761 unique products, in the year ended June 2018 – a 15 per cent increase in the number of exporters compared to the previous 12-month period (see Figure 1). 1616 exporters either started exporting or increased the value of their exports; these companies contributed $653 million to the growth in overall export value. This growth was partially offset by those companies who either stopped exporting or decreased their export value during the period; these 1125 companies declined in value by $203 million.

Figure 1: Number of Australian wine exporters (year ended June)



Commentary (continued)

Price points

In the 12 months to June 2018, there was healthy growth at nearly all price segments (see Figure 2). Exports above $10 per litre increased 45 per cent to a record $855 million. The key price segments which drove this growth were the $20 to $29.99 and $50 to $99.99 categories; both increasing by over 80 per cent. Also driving growth in overall value is the $2.49 and under segment, reflecting the increase in demand for bulk shipments**.**

Figure 2: Exports by price point (Million AUD FOB)

Price segment (A$/litre)	MAT June 2018	Value change	Growth rate
$2.49 and under	$550	$71	15%
$2.50 to $4.99	$837	$38	5%
$5.00 to $7.49	$356	$59	20%
$7.50 to $9.99	$158	$19	14%
$10.00 to $14.99	$209	$30	17%
$15.00 to $19.99	$74	-$10	-12%
$20.00 to $29.99	$167	$78	87%
$30.00 to $49.99	$106	$37	55%
$50.00 to $99.99	$222	$102	86%
$100.00 to $199.99	$22	$9	66%
$200.00 +	$56	$18	46%
Total value	$2,757	$450	20%

Wine styles

Red wine

Australian red wine continued to perform strongly with a 25 per cent increase in value in the past 12 months to $2.1 billion. Driving this growth were red wines priced above $10 per litre, increasing by 48 per cent to $797 million. Exports to China (including Hong Kong and Macau), the UK, and Singapore were the key drivers behind red wine growth.

The top 5 label claims for red wine all recorded growth:

- Shiraz grew 20 per cent to $637 million
- No variety label claim (red blend, dry red, etc.) grew 26 per cent to $420 million
- Cabernet Sauvignon grew 29 per cent to $372 million
- Shiraz/Cabernet Sauvignon grew 46 per cent to $207 million, and
- Cabernet Sauvignon/Shiraz grew 76 per cent to $132 million.

Other red label claims which recorded excellent growth included Cabernet Sauvignon/Merlot (up 5 per cent to $41 million), Shiraz/Mourvedre (up 48 per cent to $40 million), and Shiraz/Viognier (up 13 per cent to $9 million).

White wine

The value of white wine also increased, by 7 per cent to $578 million. There was growth at both ends of the price spectrum, with wines priced below $5 per litre having the highest absolute growth (up $23 million) and wines priced above $10 per litre experiencing the highest growth rate (up 16 per cent) off a lower base. The UK, Canada, and China (including Hong Kong and Macau) were the most influential in the increase in white wine exports.

Four out of the top five label claims for white wine recorded growth:

- No variety label claim (dry white, sweet white, etc.) grew 10 per cent to $239 million
- Chardonnay grew by 5 per cent to $181 million
- Sauvignon Blanc grew by 14 per cent to $44 million
- Pinot Grigio declined by 2 per cent to $31 million, and
- Pinot Gris grew by 9 per cent to $21 million.

Commentary (continued)

Other white label claims which grew during the period included Riesling (up 16 per cent to $20 million), Semillon/Chardonnay (up 10 per cent to $6 million), and Sauvignon Blanc/Semillon (up 16 per cent to $5 million).

Destinations

Nearly all export regions for Australian wine increased in value in the past 12 months, with Northeast Asia the stand out performer, growing by 51 per cent to $1.2 billion (see Figure 3).

Other regions which experienced encouraging growth included:

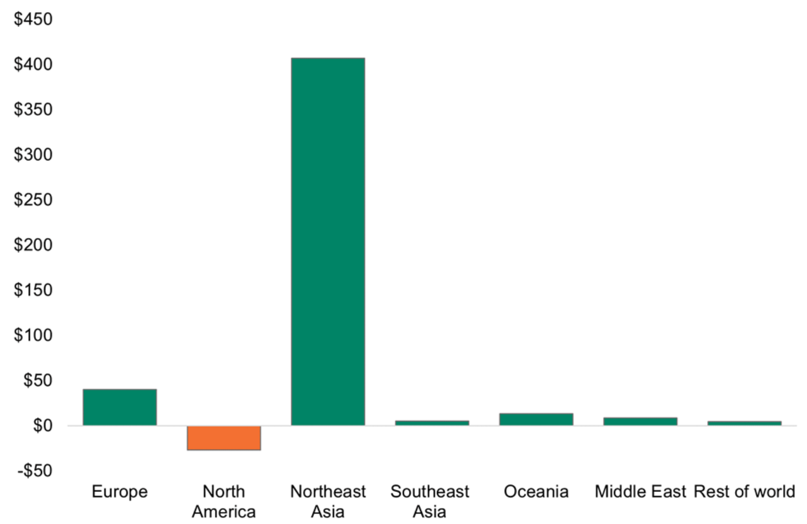
- Europe, by 7 per cent to $608 million
- Southeast Asia, by 3 per cent to $168 million
- Oceania, by 15 per cent to $99 million, and
- the Middle East, by 39 per cent to $30 million.

North America was the only region to decline in value, by 4 per cent to $624 million, with a $12 million increase in the value of exports to Canada only partially offsetting a $39 million decline in the exports to the United States of America (USA).

The top five markets by value were:

- China (including Hong Kong and Macau) with a 40 per cent share of export value
- United States of America (15 per cent)
- United Kingdom (14 per cent)
- Canada (7 per cent)
- New Zealand (3 per cent)

Figure 3: Value growth by region (Million AUD FOB)



The top five markets by volume were:

- United Kingdom (29 per cent of export volume)
- China (including Hong Kong and Macau) (22 per cent)
- United States of America (19 per cent)
- Canada (8 per cent)
- Germany (5 per cent)

Commentary (continued)

China (including Hong Kong and Macau)

Exports to China (including Hong Kong and Macau) increased by 55 per cent to $1.12 billion in the year ended June 2018. Volume increased by 47 per cent to 184 million litres (20.5 million 9L cases), leading to a 6 per cent increase in the average value per litre to $6.06.

Mainland China

Australian wine exports to mainland China reached $1 billion for the first time, a 66 per cent increase from the previous 12 months. Volume increased by 50 per cent to 176 million litres (19.6 million 9L cases), leading to an increase in average value per litre of 11 per cent to $5.71.

Two-thirds of the volume shipped to mainland China is in glass bottles, while just under a third is shipped in bulk containers, with the remainder made up of alternative packaging and soft packs. Glass bottle exports increased by 36 per cent to 119 million litres (13.2 million 9L cases), while the average value increased by 20 per cent to $7.82. Bulk exports increased by 93 per cent to 57 million litres (6.4 million 9L cases), with the average value increasing by 7 per cent to $1.34.

While all price points contributed to value growth (see Figure 4), it is apparent that the Chinese appetite for premium Australian wine was the largest driver. Exports valued above $10 per litre more than doubled in the past 12 months to $486 million. Both the $50 to $99.99 and the above $200 segments more than tripled in value, while robust value growth also came from the $10 to $14.99 and $20 to $29.99 segments.

Figure 4: Exports to mainland China by price point

Price segment (A$/litre)	MAT June 2018	Value change	Growth rate
$2.49 and under	$81,501,558	$39,502,115	94%
$2.50 to $4.99	$226,131,549	$42,120,331	23%
$5.00 to $7.49	$146,294,894	$46,378,454	46%
$7.50 to $9.99	$65,031,851	$21,643,380	50%
$10.00 to $14.99	$95,907,737	$33,803,591	54%
$15.00 to $19.99	$33,678,358	$5,047,991	18%
$20.00 to $29.99	$102,107,481	$54,105,203	113%
$30.00 to $49.99	$62,452,863	$29,535,217	90%
$50.00 to $99.99	$150,926,059	$100,883,394	202%
$100.00 to $199.99	$9,947,250	$5,821,898	141%
$200.00 +	$30,792,826	$21,162,470	220%
Total value	$1,004,772,426	$400,004,043	66%

Chinese wine imports from all international suppliers grew by 27 per cent in value to US$3 billion in the year ended March 2018 (Global Trade Atlas), with all wine exporters in the top ten enjoying growth, except South Africa. Although France retains the number one position in imported wine, Australia holds a strong position in comparison to our competitors, experiencing the highest value growth rate for total wine and the highest average value per litre in the top five origins of bottle wine imports.

David Lucas, Wine Australia’s Regional General Manager, China, said ‘the momentum for Australian wine is clearly being maintained and, what is more encouraging, especially over recent months, is the strengthening of demand for premium price point brands. The work done by the wineries during Vinexpo Hong Kong and the China Roadshow is also having positive impacts on the trade’s attitude to premium Australian wines. The additional funding from the $50m Export and Regional Wine Support Package allows us to increase our share of voice that will further support this momentum, especially in the projects we will execute during the third and fourth quarters of 2018.’

Commentary (continued)

North America

United States of America

In the year ended June 2018, exports to the USA decreased by 8 per cent in value to $424 million and volume by 11 per cent to 160 million litres (17.7 million 9 litre case equivalents). Volume decline outpaced value, resulting in a 2 per cent increase in the average value per litre to $2.66. 65 per cent of the decrease in volume was a result of a decrease in bulk shipments, while bottled wine contributed to 35 per cent of the decline.

The USA remains very much a tale of two markets. On one hand, there is the big-volume, commercial market priced below US$8 per bottle. According to IRI Worldwide, this part of the market holds a 54 per cent volume share of the USA off-trade, but it is in decline as consumers are trading up to higher-priced wines. As reported in Figure 5, this trend is also apparent in the export data. All price segments below $10 per litre are in decline, particularly the $2.50 to $4.99 segment. Because this part of the market has historically been where Australia has sold most of its wines, this weakening is a major factor in the decline of the overall export figures.

Figure 5: Exports to the USA by price point

Price segment (A$/litre)	MAT June 2018	Value change	Growth rate
$2.49 and under	$84,998,851	($12,754,600)	-13%
$2.50 to $4.99	$261,376,662	($22,453,985)	-8%
$5.00 to $7.49	$21,758,944	($2,232,830)	-9%
$7.50 to $9.99	$14,354,473	($940,792)	-6%
$10.00 to $14.99	$17,532,622	($2,768,614)	-14%
$15.00 to $19.99	$10,255,668	$1,168,574	13%
$20.00 to $29.99	$5,402,280	($689,702)	-11%
$30.00 to $49.99	$4,808,788	$585,075	14%
$50.00 to $99.99	$2,327,417	$431,539	23%
$100.00 to $199.99	$757,878	$161,458	27%
$200.00 +	$849,031	$188,348	29%
Total value	$424,422,612	($39,305,529)	-8%

On the other hand, there is the premium end of the market. With a 46 per cent share of the off-trade wine market in the USA, this part of the market is enjoying robust growth. Again, the premiumisation trend is reflected in the Australian export data; nearly all price points above $10 per litre are in growth, albeit off small bases. As the market moves through this transition, the effect of the commercial end of the market on overall export figures should lessen, allowing for Australian premium wines to have a greater influence.

Looking at variety label claims above $10, Shiraz and Cabernet Sauvignon both grew in the past 12 months, by 5 per cent to $20 million and 1 per cent to $6 million, respectively. Other varieties in this price segment experiencing growth include, Shiraz/Cabernet Sauvignon (up 42 per cent to $1 million) and Pinot Noir (up 3 per cent to $928,000).

Interestingly, more people in the USA consume Australian wine than in Australia. According to Wine Intelligence, 87 per cent of Australian wine consumers drink Australian wine, equating to 8.7 million people. In comparison, 19 per cent of regular imported wine consumers in the USA drink Australian wine equating to 18.05 million people, the largest population of Australian wine drinkers in the world. This illustrates just how important the USA market is for Australian exports, and although Australia's position in the USA market is not what it once was, there is still plenty of upside available in the largest market for wine in the world.

There are in-market signs that the USA market is turning around for Australian wine. According to Wine Intelligence, the perceptions of the quality of Australian wine among US wine consumers has been improving (from 7.82 out of 10 in 2010 to 8.14 in 2018). Australian performance in the off-trade is also showing signs of improvement, with an increase of 2 per cent on overall value to US$516 million in the year ended March 2018 (IRI Worldwide). The on-trade reports even stronger growth figures for Australia, increasing by 4 per cent to US$266 million (Nielsen-CGA).

Commentary (continued)

Wine Australia Chief Executive Officer Andreas Clark said, 'Australia now has the opportunity to capture more of the premium end of the US market as consumers trade up to higher priced wines. We recently launched our inaugural Australian wine Decanted at Lake Tahoe, California. This four-day wine education program is immersing 100 key influencers from the USA in Australia's diverse and thriving wine scene to raise awareness of the breadth of Australia's fine wine offering and the perception of the Australian wine category in the USA.

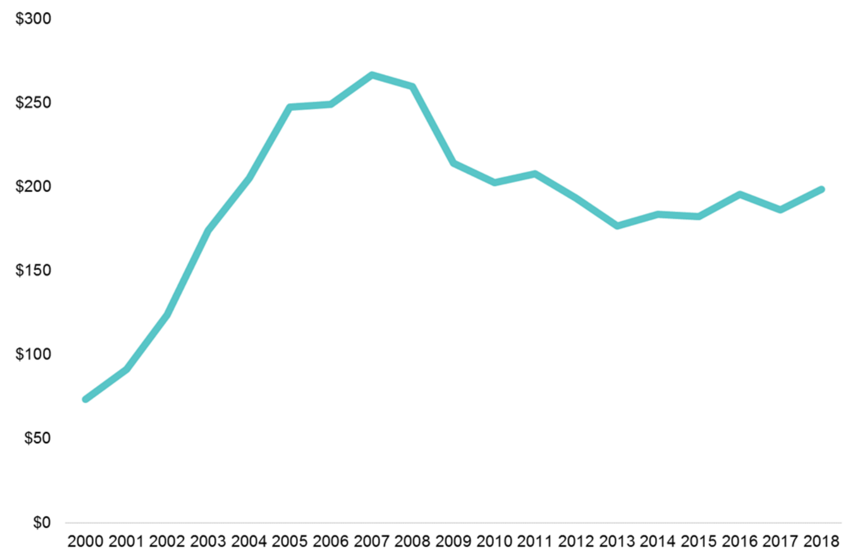
'Decanted will become Wine Australia's signature annual event in the USA and will be followed by Aussie Wine Week in September and Aussie Wine Month in September 2019'.

Canada

Australian exports to Canada have been in slow recovery since 2013 (see Figure 6). The year ended June 2018 showed some momentum as export value increased by 7 per cent to $199 million, while volume increased by 11 per cent to 68 million litres (7.6 million 9L cases). The stronger rate of growth in volume was a result of a larger increase in bulk shipments than bottled. The volume of wine shipped in bulk containers increased by 18 per cent to 40 million litres (4.4 million 9L cases), while shipments of glass bottles also increased, although at a lower rate, by 3 per cent to 28 million litres (3.1 million 9L cases).

Australia's white wines continue to find success in Canada, increasing by 18 per cent in value to $67 million. Canada is the number one destination for Australian white wines priced above $5 per litre; this segment increased 21 per cent to $25 million in the past year.

Figure 6: Value of exports to Canada, year ended June (Million AUD FOB)



Four out of the top five white variety label claims recorded growth:

- No variety label claim (dry white, sweet white, etc.) grew 29 per cent to $38 million
- Chardonnay grew 10 per cent to $13 million
- Pinot Gris grew 18 per cent to $4.3 million
- Pinot Grigio declined 16 per cent to $2.7 million, and
- Sauvignon Blanc grew 5 per cent to $2.3 million.

Commentary (continued)

Shipments to every Canadian province grew in value for the year ended June 2018.

Five provinces account for 97 per cent of Australian wine export value to Canada:

- Ontario, up 3 per cent to $73 million
- British Columbia, up 12 per cent to $48 million
- Quebec, up 9 per cent to $44 million
- Alberta, up 5 per cent to $18 million, and
- Nova Scotia, up 0.3 per cent to $10 million.

Europe

Europe is a large group of countries, which together approach the same export value as North America. Australia exported to 30 different countries within Europe in the year ended June 2018, with exports growing to 19 of these destinations. The countries which grew in export value contributed $65 million to the overall increase in exports.

Laura Jewell MW, Wine Australia's Regional General Manager, EMEA, said 'Sales of Australian wine remain robust in the UK off-trade, with growth in all price points above £4 per bottle and total growth of 3 percent according to IRI figures in March 2018. Despite the ongoing uncertainty over the actual impact of Brexit, the exchange rate has stabilised and there is optimism among retailers. We have seen Australian themed promotions at both Oddbins and Selfridges over the summer in the UK. Across Europe and the Middle East, it is encouraging to see strong growth figures in a number of key markets, including United Arab Emirates, Russia, Belgium and Sweden but particularly in Germany where our campaign is beginning to have a positive effect.

United Kingdom

In volume terms, more Australian wine gets shipped to the United Kingdom than any other destination. Exports to the UK increased by 12 per cent in both value and volume, to $384 million and 246 million litres (27.3 million 9 litre case equivalents) respectively. The value increase slightly outpaced volume to increase average value per litre by 1 per cent to $1.56.

More than 80 per cent of wine exported to the UK is shipped in bulk containers, and 42 per cent of all Australian bulk wine shipments are destined for the UK. In the past year, bulk wine shipments to the UK increased by 13 per cent to 198 million litres (22 million 9L case equivalents) and the average price per litre increased by 9 per cent to $1.01, helped by the global shortage of bulk wine due to low yielding harvests in Europe. The increase in bulk volume can also be partially explained by some brands shifting bottling to the UK from other parts of Europe.

Glass bottle shipments have also increased, by 6 per cent to 48 million litres (5.3 million 9L case equivalents), although the average value per litre fell by 3 per cent to $3.87. The $2.50 to $4.99 price segment is driving the growth in bottled wine (see Figure 7), influenced by some brands shifting bottling back to Australia from the UK.

Figure 7: Exports to the UK by price point

Price segment (A$/litre)	MAT June 2018	Value change	Growth rate
$2.49 and under	$206,420,093	$23,792,320	13%
$2.50 to $4.99	$118,747,467	$29,251,987	33%
$5.00 to $7.49	$23,577,017	($3,744,293)	-14%
$7.50 to $9.99	$11,306,938	($2,529,724)	-18%
$10.00 to $14.99	$11,882,758	($2,399,196)	-17%
$15.00 to $19.99	$4,446,009	($517,012)	-10%
$20.00 to $29.99	$2,896,273	($536,292)	-16%
$30.00 to $49.99	$2,158,223	($475,284)	-18%
$50.00 to $99.99	$961,284	($470,273)	-33%
$100.00 to $199.99	$562,005	($266,877)	-32%
$200.00 +	$845,019	$166,975	25%
Total value	$383,803,088	$42,272,330	12%

Commentary (continued)

The premium wine market remains a challenge for Australia, with exports priced at $10 per litre and above declining by 16 per cent to $24 million this year. However, there are several factors which Australia can leverage to grow premium wine consumption. Australia is number one in the UK off-trade market (up by 3 per cent in value to £1.2 billion, IRI Worldwide), carrying with it a solid reputation for value-for-money and food friendly wines. Quality perceptions of Australian wine are also improving, increasing from 7.71 out of 10 in 2010 to 8.08 in 2018 (Wine Intelligence).

There are also several white varieties of Australian wine that are growing in export value. Bottled white wines increased in value by 7 per cent to $71 million in the past 12 months, compared with 1 per cent for red wines. Bottled Chardonnay increased by 12 per cent to $35 million, Sauvignon Blanc by 25 per cent to $16 million, and Pinot Gris by 8 per cent to $4 million. The UK is also the number one destination of bottled Sauvignon Blanc, double the value of the USA at number two.

Germany

Germany is the largest imported wine market in the world by volume and although there is fierce competition from other European wine exporters, including domestically produced wine, Australia is enjoying the highest growth rates of the top 9 countries of origin in overall wine imports. In the year ended June 2018, Australian wine exports to Germany increased by 19 per cent in value to $59 million and 8 per cent in volume to 40 million litres (4.4 million 9 litre case equivalents).

There was growth across the price spectrum:

- $2.49 and under grew 17 per cent to $38 million
- $2.50 to $4.99 grew 34 per cent to $13 million
- $5.00 to $7.49 grew 15 per cent to $2.5 million
- $7.50 to $9.99 grew 5 per cent to $1.9 million, and
- $10 and over grew 7 per cent to $3.9 million.

While wine shipped in bulk containers is still a large part of this highly price sensitive, discounter dominated market, German wine consumers are also trading up to higher priced wines, evident through the increases at higher price segments. For example, Australian Shiraz priced at $10 per litre or higher increased by 11 per cent to $2 million.

Like the UK and Canada, German wine consumers are showing favour to Australian bottled white wines; Chardonnay increased by 69 per cent to $4 million, while Riesling’s export value jumped from $78,000 to over $1 million in the last 12 months.

These growth rates indicate that the programme of Wine Australia activities in the German market during the last years are bearing fruit. Advertorials in key media (Falstaff), a roadshow tour focussing on cool climate styles (Chardonnay & Shiraz), a dedicated on and off-trade education programme with the sommelier schools and the biggest stand of Wine Australia at ProWein helped to raise the awareness of Australian Wines.

Sweden

In the year ended June 2018, Australian exports to Sweden increased by 12 per cent in value to $23 million and volume increased 5 per cent to 6.5 million litres (727,000 9L cases). Average value per litre increased 7 per cent to $3.57. This increase in average value was driven by robust growth rates in higher price points, coupled with a decline at the lower end of the market:

- $2.49 and under decreased 7 per cent to $4.5 million
- $2.50 to $4.99 grew 11 per cent to $11 million
- $5.00 to $7.49 grew 50 per cent to $3.7 million
- $7.50 to $9.99 grew 9 per cent to $2.5 million, and
- $10 and over grew 23 per cent to $2.0 million.

Commentary (continued)

The increase in wines priced above $10 and over has been mostly driven by red wine, growing 29 per cent to $1.5 million. Overall, bottled Shiraz increased 21 per cent to $5.2 million, Shiraz/Cabernet Sauvignon increased 19 per cent to $3.3 million, and Cabernet Sauvignon increased by 50 per cent to $1.5 million.

The wine market in Sweden is controlled by the government monopoly, Systembolaget, which heavily influences consumer purchasing behaviour. Systembolaget is actively seeking more organic wines to add to their range and will guarantee a listing time of 12 months to organic wines and only 9 months to all others (Meininger's Wine Business International). Organic wine sales have increased 27 per cent in the past year as the health trend affects consumer's choices. Sweden is Australia's number one destination for organic wines, although organic wines make up less than one per cent of all exports.

Finland

Like its Nordic neighbour, Finland is also importing more Australian wine. The value of exports to Finland increased by 6 per cent to $17 million and volume increased by 12 per cent to 7.5 million litres (838,000 9L cases).

Shipments of wine in bulk containers contributed 77 per cent of the export volume and grew 18 per cent to 5.8 million litres in the past 12 months (641,000 9L cases equivalents). Exports of wine in glass bottles decreased 4 per cent to 1.8 million litres, driven by a 31 per cent decrease in wines priced between $5 to $7.49. However, there was robust growth at higher price points, with the $10 and over segment increasing 22 per cent to $2.3 million.

Key bottled varieties in growth are Riesling, up 49 per cent to $1.1 million, Cabernet Sauvignon, up 4 per cent to $488,000, and Chardonnay, up 41 per cent to $374,000.

Finnish consumers are influenced by what is available at Alko, the government alcohol monopoly of Finland.

Belgium

Belgium, although a small country of only 11 million people, has an established wine market with a strong preference for French wines. Nevertheless, Australian wine exports to Belgium have increased 3 per cent in value to $15 million in the past 12 months.

Nearly all price points experienced growth:

- $2.49 and under grew 13 per cent to $7.4 million
- $2.50 to $4.99 declined 36 per cent to $3.0 million
- $5.00 to $7.49 grew 63 per cent to $1.9 million
- $7.50 to $9.99 grew 54 per cent to $972,000, and
- $10 and over grew 12 per cent to $1.8 million.

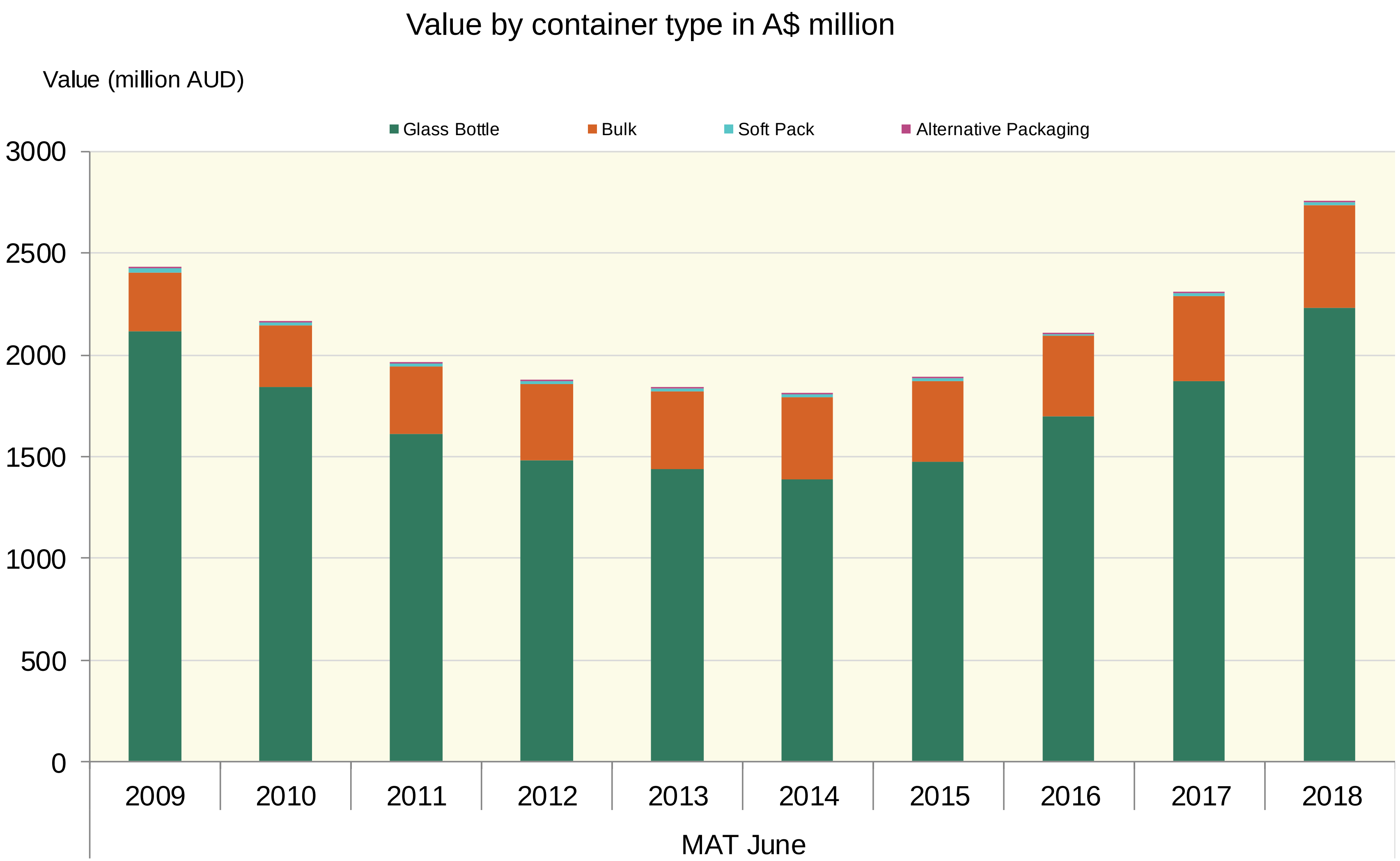
Here white wines are also experiencing the most growth, increasing 21 per cent in value to $8 million. Key bottled varieties in growth include Riesling, Semillon, and Sauvignon Blanc.

Other markets

Other markets with good growth include:

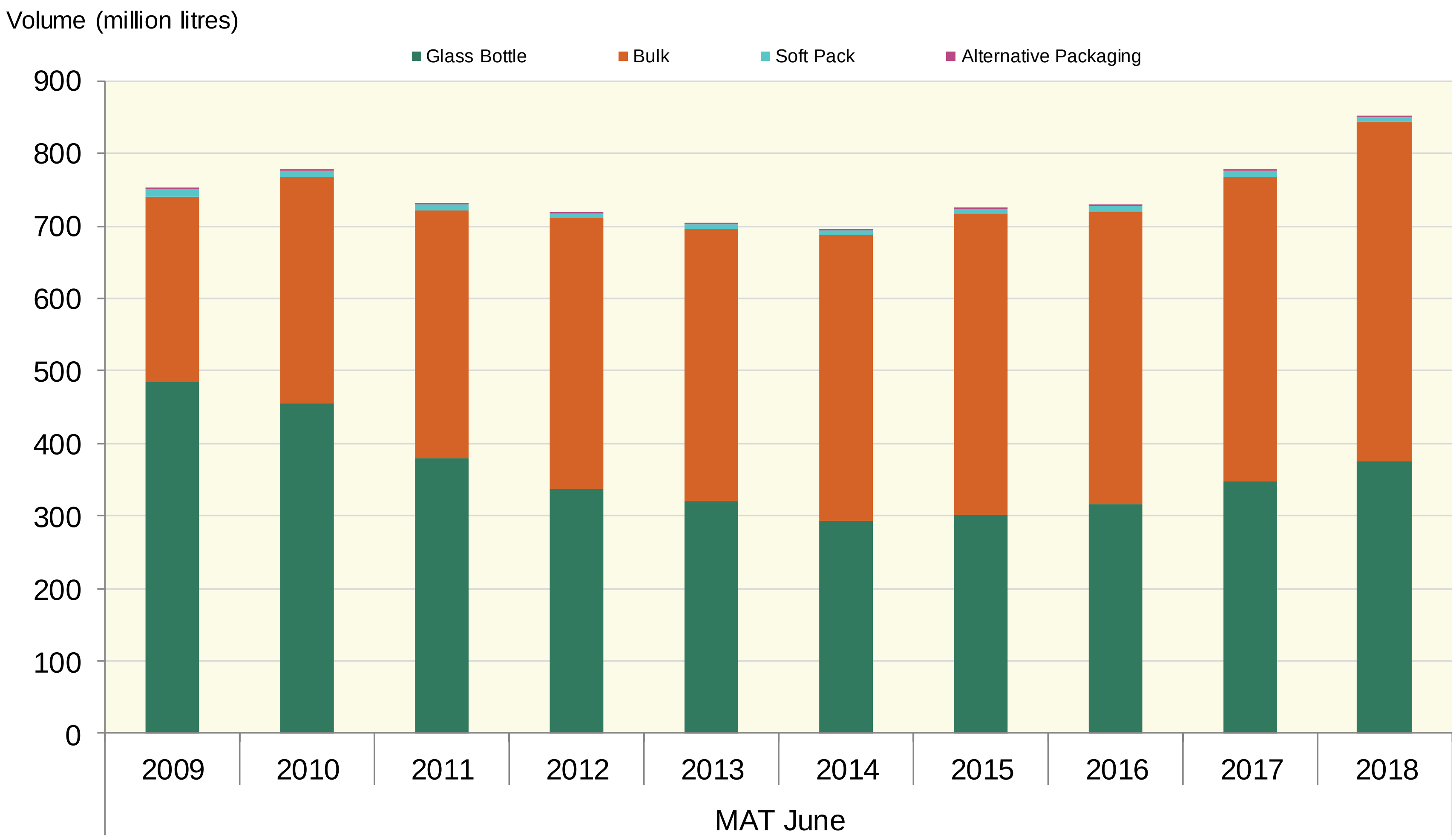
- New Zealand, up 17 per cent to $88 million
- Singapore, up 27 per cent to $87 million
- Japan, up 15 per cent to $53 million
- United Arab Emirates, up 41 per cent to $28 million, and
- South Korea, up 24 per cent to $17 million.

Historic overview of exports

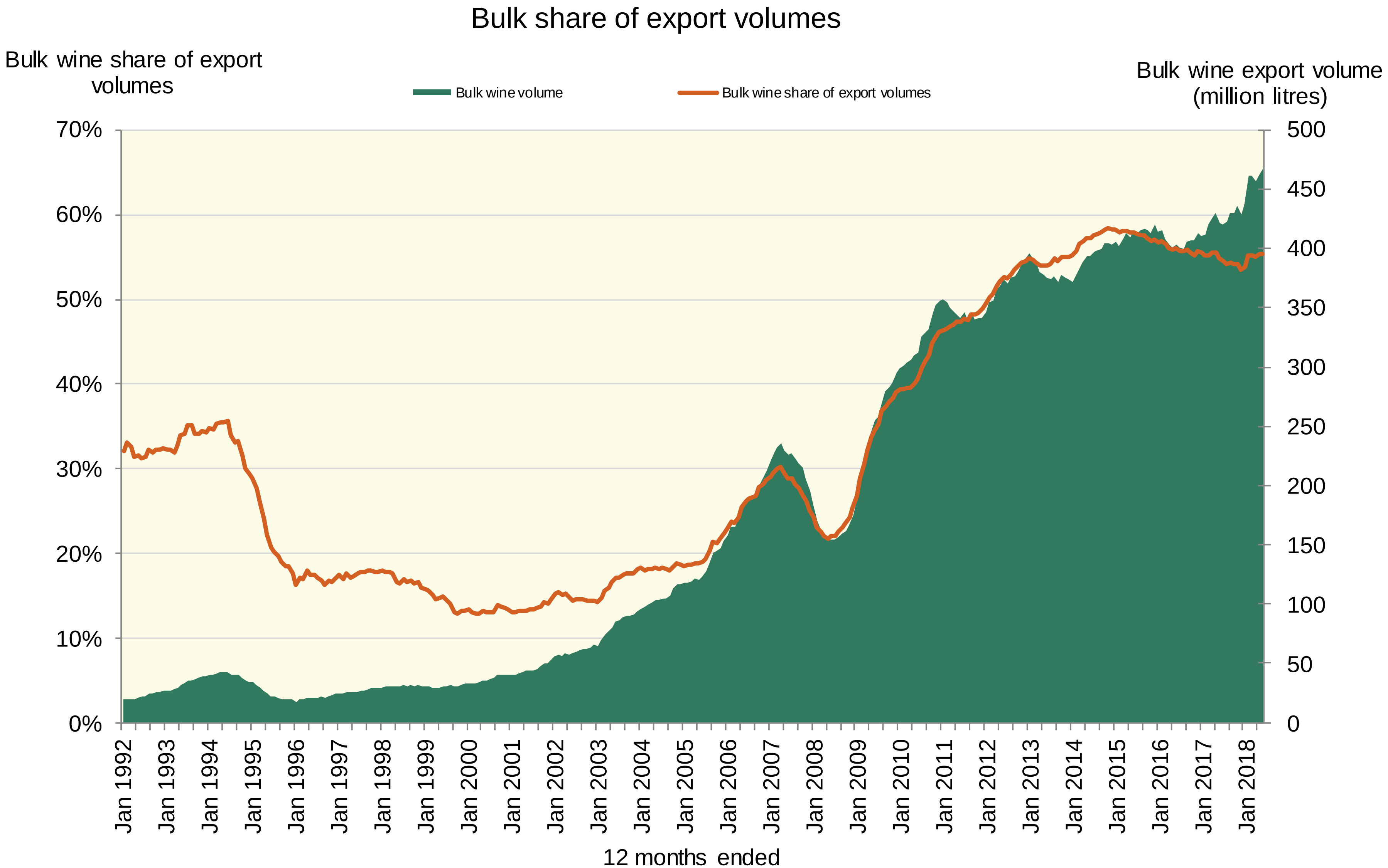


Historic overview of exports

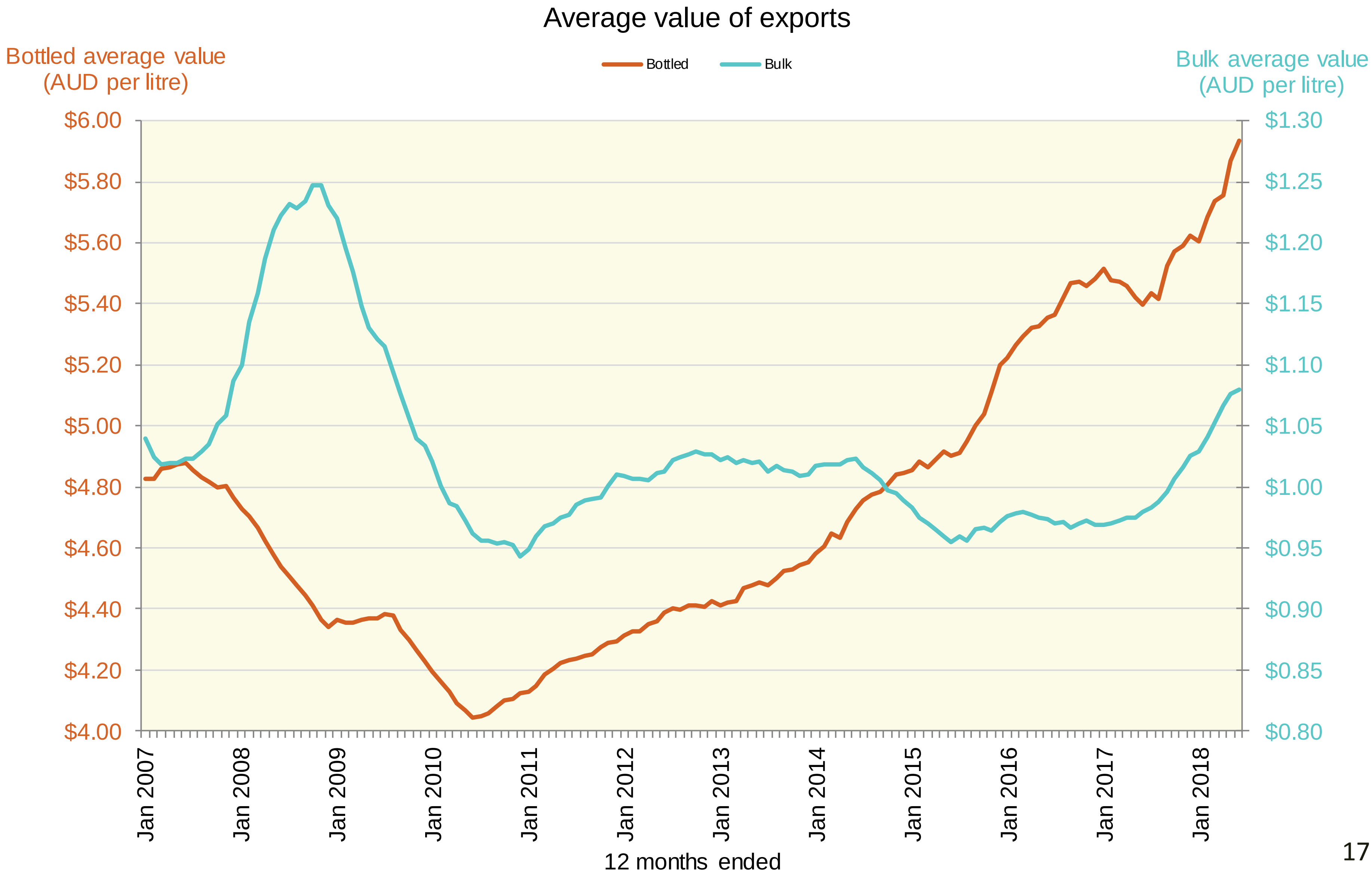
Volume by container type ('000 litres)



Historic overview of exports

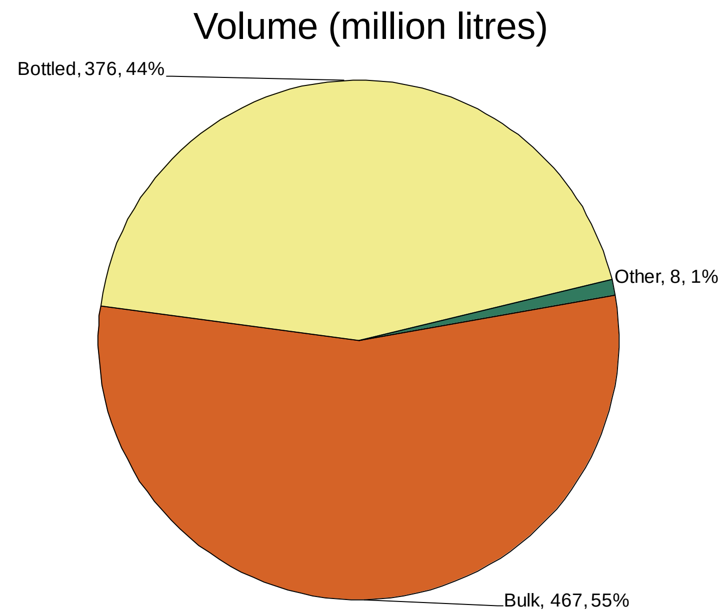


Historic overview of exports

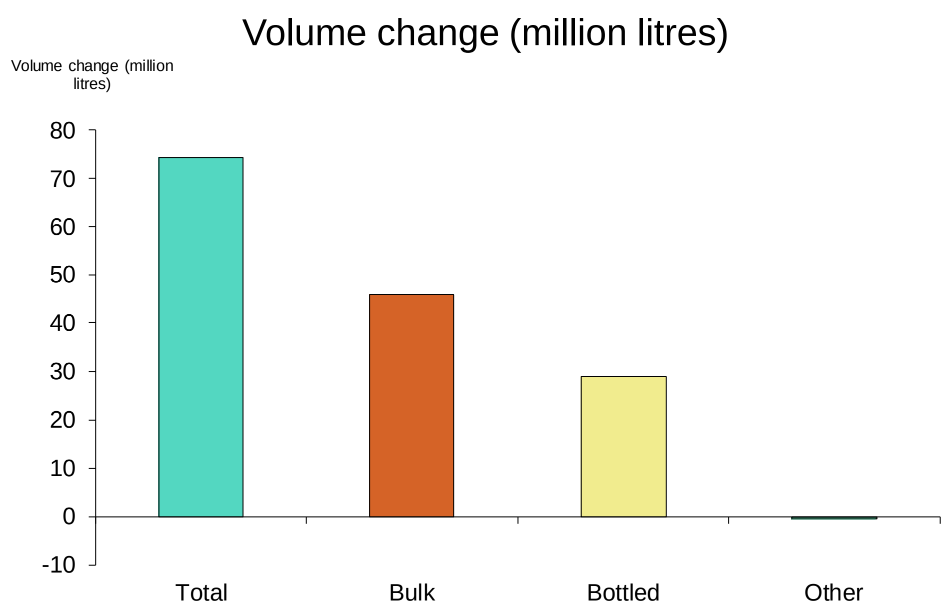


Exports by container type

MAT June 2018



		Volume (ML)	Value (A$M FOB)	Average Value (A$/L FOB)
Bottled	2018	376	2,232	5.94
	Change	8%	19%	10%
	Share	44%	81%	
Bulk	2018	467	504	1.08
	Change	11%	22%	10%
	Share	55%	18%	
Other	2018	8	20	2.44
	Change	-6%	-1%	6%
	Share	1%	1%	
Total	2018	852	2,757	3.24
	Change	10%	20%	9%
	Share	100%	100%	



"Other" includes wine in soft-packs and alternative packaging

Wine exports by country, container and colour

Value for MAT June 2018

	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 June 2018 (A$ '000s)	Change %	MAT June 2018 (A$ '000s)	Change %	MAT June 2018 (A$ '000s)	Change %	MAT June 2018 (A$ '000s)	Change %	MAT June 2018 (A$ '000s)	Change %	MAT June 2018 (A$ '000s)	Change %	MAT June 2018 (A$ '000s)	Change %	MAT June 2018 (A$ '000s)	Change %	MAT June 2018 (A$ '000s)	Change %
China, Pr	883,762	66%	73,330	++	836	-25%	30,362	41%	3,336	35%	77	-1%	8,149	43%	4,921	-11%	1,004,772	66%
United States Of America	211,026	-10%	30,482	-3%	326	-62%	123,100	-4%	46,410	-12%	76	++	3,901	-14%	9,102	-19%	424,423	-8%
United Kingdom	109,468	1%	125,040	29%	0	na	70,608	7%	73,693	16%	0	-100%	3,726	-18%	1,267	4%	383,803	12%
Canada	105,739	-1%	18,683	18%	918	55%	43,611	7%	21,976	47%	1,816	21%	4,032	11%	1,811	-15%	198,586	7%
Hong Kong	99,141	-4%	31	na	1,688	40%	6,759	-4%	0	na	246	-27%	1,426	23%	744	-7%	110,034	-4%
New Zealand	50,851	8%	10,283	87%	624	-6%	9,771	23%	7,236	2%	673	64%	7,186	66%	1,856	-38%	88,481	17%
Singapore	72,920	39%	0	na	393	10%	7,104	-3%	0	na	102	-6%	5,868	-20%	708	-12%	87,095	27%
Germany, Federal Republic	16,344	-17%	22,167	56%	0	na	5,506	++	14,386	15%	0	na	110	-20%	58	7%	58,571	19%
Japan	23,174	19%	4,133	100%	2,369	5%	11,510	6%	2,215	63%	1,057	11%	4,497	-13%	4,296	4%	53,250	15%
Malaysia	40,036	-15%	0	na	99	++	2,802	8%	0	na	8	38%	192	-10%	228	-27%	43,365	-14%
Netherlands	11,130	-26%	4,330	17%	0	na	11,754	-9%	6,725	91%	0	na	820	-20%	122	-93%	34,881	-8%
United Arab Emirates	19,408	66%	0	-100%	724	35%	6,145	34%	0	na	499	43%	1,033	-10%	548	9%	28,358	41%
Sweden	12,950	16%	2,380	-8%	0	na	5,590	3%	1,351	19%	0	na	1,088	++	27	-8%	23,385	12%
Denmark	8,802	-14%	5,958	9%	0	na	3,741	12%	2,218	-25%	0	na	617	-10%	508	-7%	21,843	-6%
Thailand	11,874	-14%	891	35%	519	-63%	2,908	-27%	413	++	216	-59%	1,142	24%	85	-46%	18,047	-16%
Finland	6,096	-6%	4,327	73%	0	na	2,996	38%	2,704	-9%	0	na	492	-57%	184	-64%	16,801	6%
Korea, R	12,226	26%	0	na	1,033	40%	2,984	29%	0	na	46	++	363	-24%	89	-69%	16,740	24%
Belgium	3,534	-17%	2,591	-21%	0	na	3,743	-6%	4,461	59%	0	na	601	97%	207	62%	15,137	3%
Taiwan Province	12,823	-4%	0	-100%	268	-1%	1,230	32%	44	na	103	1%	139	-57%	301	-22%	14,907	-3%
Ireland	6,337	-30%	31	na	0	na	5,163	-25%	31	-50%	0	na	170	-3%	19	-84%	11,751	-28%
Rest of the world	60,690	8%	6,330	-63%	1,656	1%	21,365	16%	5,746	-11%	1,209	-4%	3,154	12%	2,241	-9%	102,391	-4%
World	1,778,330	24%	310,987	31%	11,454	-2%	378,752	5%	192,944	10%	6,128	7%	48,706	5%	29,320	-19%	2,756,622	20%

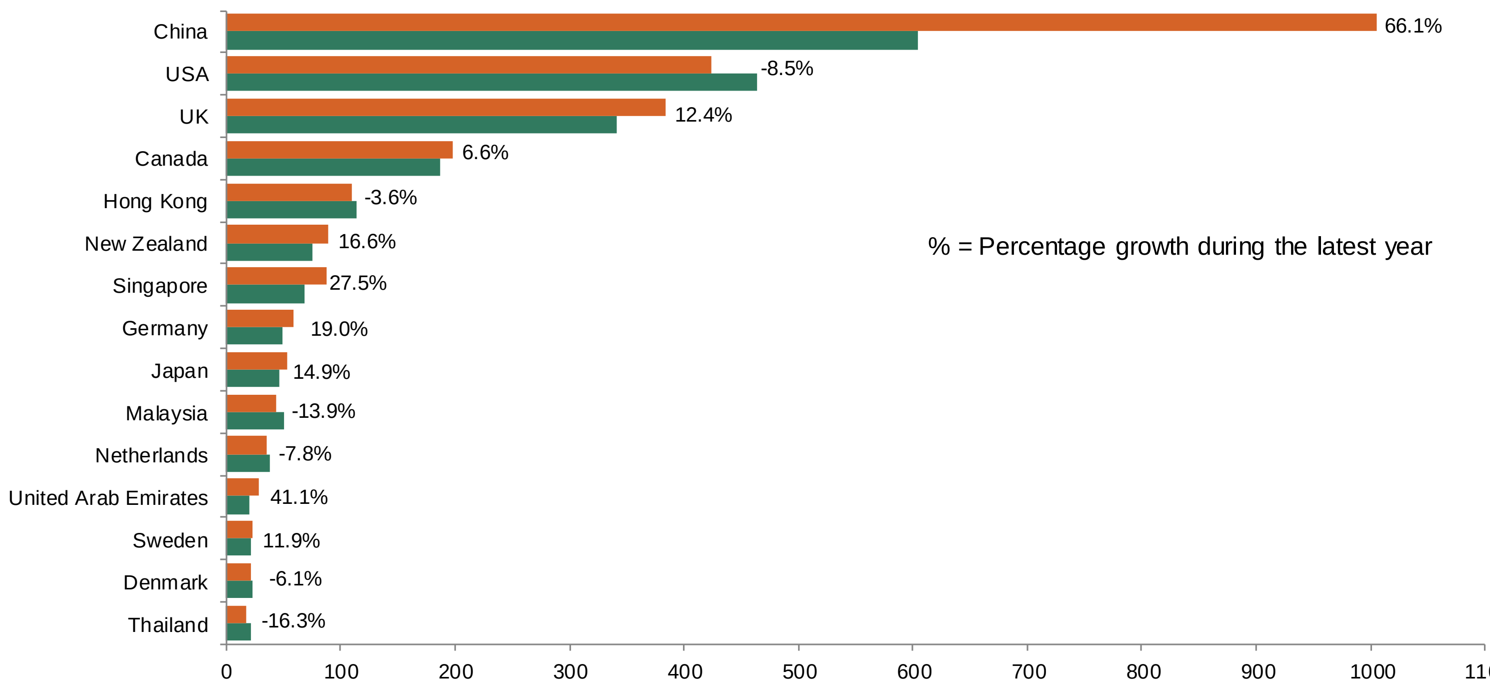
Wine exports
by country, container and colour

Volume for MAT June 2018

	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 June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %
United Kingdom	25,360	4%	117,667	20%	0	na	21,418	10%	80,087	5%	0	-100%	823	-27%	277	-4%	245,632	12%
China, Pr	111,615	37%	54,740	++	262	-46%	4,892	38%	2,388	-21%	29	-26%	1,338	32%	742	-18%	176,005	50%
United States Of America	51,067	-10%	19,803	-19%	87	-66%	35,473	-1%	49,900	-13%	14	++	733	-9%	2,509	-19%	159,587	-11%
Canada	17,527	2%	17,876	4%	231	42%	9,405	4%	21,823	33%	370	-6%	688	5%	373	-7%	68,293	11%
Germany, Federal Republic	4,330	-20%	17,442	19%	0	na	1,760	35%	16,058	4%	0	na	7	-42%	17	++	39,615	8%
New Zealand	9,814	11%	6,945	27%	310	-13%	3,124	37%	9,223	0%	230	2%	1,386	48%	337	-55%	31,369	12%
Netherlands	3,539	-13%	3,749	-1%	0	na	3,753	-6%	7,641	83%	0	na	245	-1%	50	-90%	18,977	13%
Japan	3,826	6%	3,326	++	1,410	5%	2,087	-5%	2,386	74%	592	7%	1,018	-7%	945	15%	15,591	26%
Denmark	1,449	-9%	5,226	-8%	0	na	892	12%	2,474	-35%	0	na	130	-9%	125	-7%	10,295	-15%
Belgium	560	-31%	2,393	-28%	0	na	727	-26%	5,187	51%	0	na	134	95%	38	67%	9,039	5%
Hong Kong	6,135	-4%	24	na	643	30%	959	-3%	0	na	103	-32%	146	9%	63	-17%	8,072	-2%
Finland	991	-7%	2,974	54%	0	na	617	37%	2,795	-5%	0	na	106	-49%	58	-51%	7,540	12%
Sweden	2,555	8%	1,485	-8%	0	na	1,503	-1%	728	15%	0	na	270	++	3	-28%	6,544	5%
Singapore	4,541	24%	0	na	223	18%	911	-4%	0	na	32	-47%	614	-10%	71	-10%	6,393	14%
France	144	-30%	2,954	75%	1	na	78	53%	1,577	-34%	0	na	0	-82%	0	na	4,754	10%
Malaysia	3,477	-6%	0	na	60	++	528	14%	0	na	5	43%	28	-26%	31	-42%	4,128	-4%
United Arab Emirates	1,894	54%	0	-100%	439	32%	994	20%	0	na	346	46%	148	-37%	160	12%	3,982	24%
Thailand	1,480	-35%	695	29%	268	-65%	629	-35%	408	++	117	-63%	171	32%	22	-38%	3,790	-27%
Ireland	1,720	-26%	26	na	0	na	1,771	-17%	26	-50%	0	na	44	-14%	3	-86%	3,591	-21%
Korea, R	1,616	16%	0	na	497	35%	534	23%	0	na	15	87%	52	-38%	15	-67%	2,729	17%
Rest of the world	11,331	7%	1,862	-86%	829	1%	4,732	16%	5,220	24%	624	-1%	493	-6%	557	-12%	25,647	-26%
World	264,971	11%	259,188	18%	5,260	-6%	96,787	5%	207,920	3%	2,476	-6%	8,574	4%	6,397	-21%	851,572	10%

Exports
by top 15 destinations

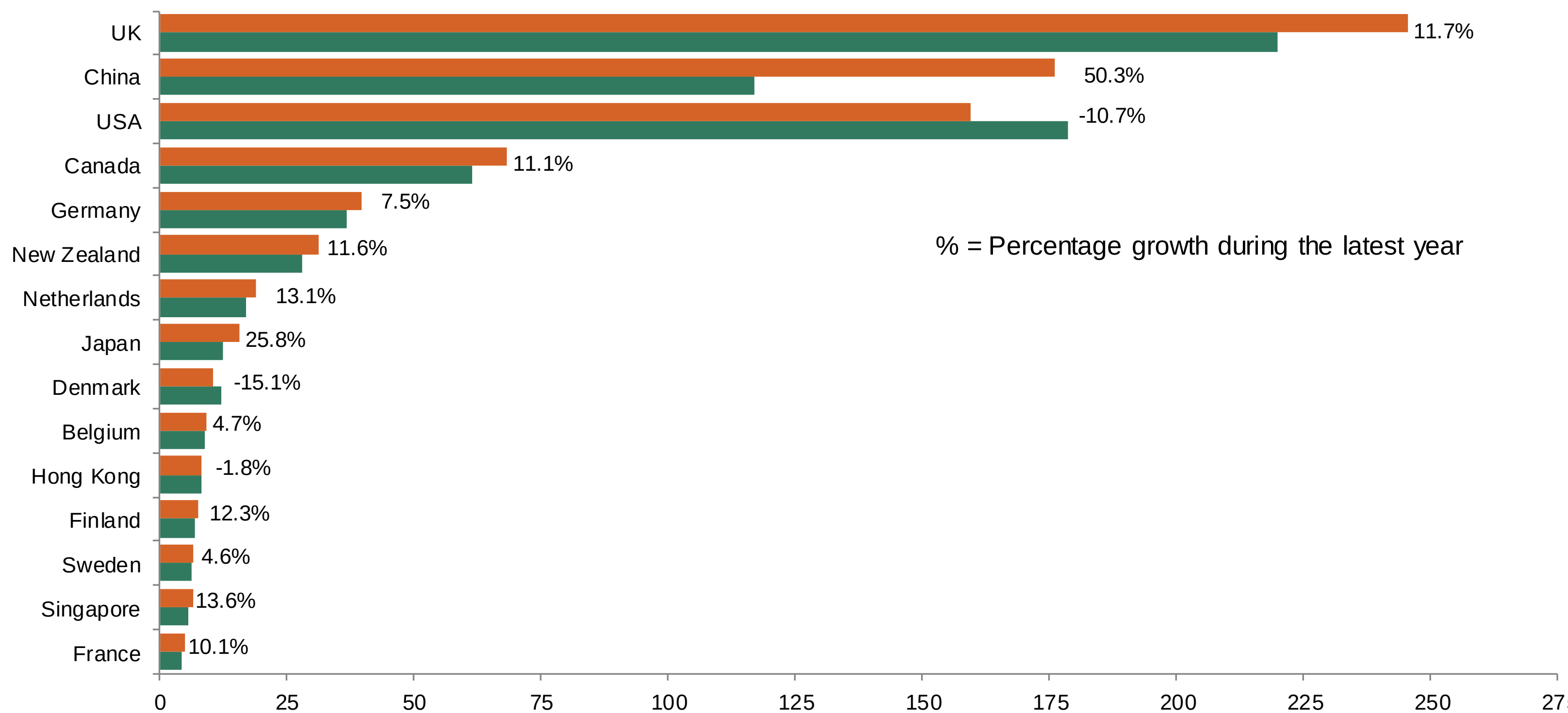
Value (million A$) for MAT June 2018



	Thailand	Denmark	Sweden	United Arab Emirates	Netherlands	Malaysia	Japan	Germany	Singapore	New Zealand	Hong Kong	Canada	UK	USA	China
2018	18.0	21.8	23.4	28.4	34.9	43.4	53.2	58.6	87.1	88.5	110.0	198.6	383.8	424.4	1004.8
2017	21.6	23.2	20.9	20.1	37.8	50.4	46.3	49.2	68.3	75.9	114.1	186.2	341.5	463.7	604.8

Exports
by top 15 destinations

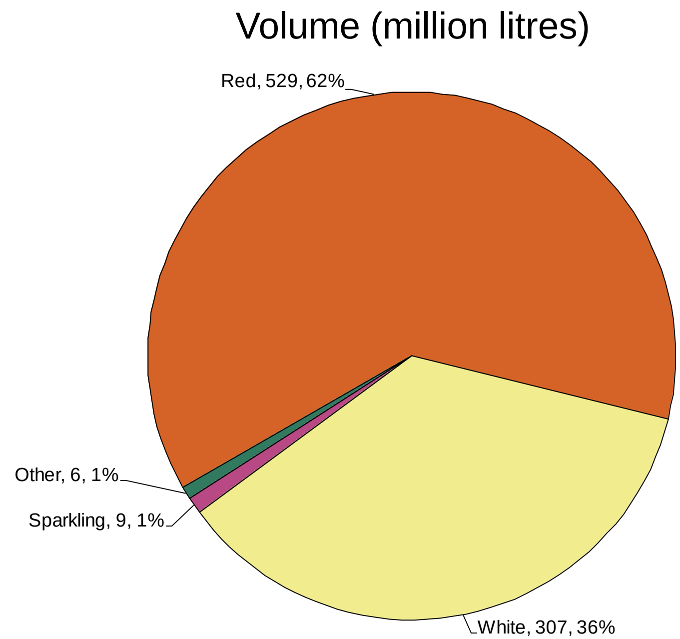
Volume (million litres) for MAT June 2018

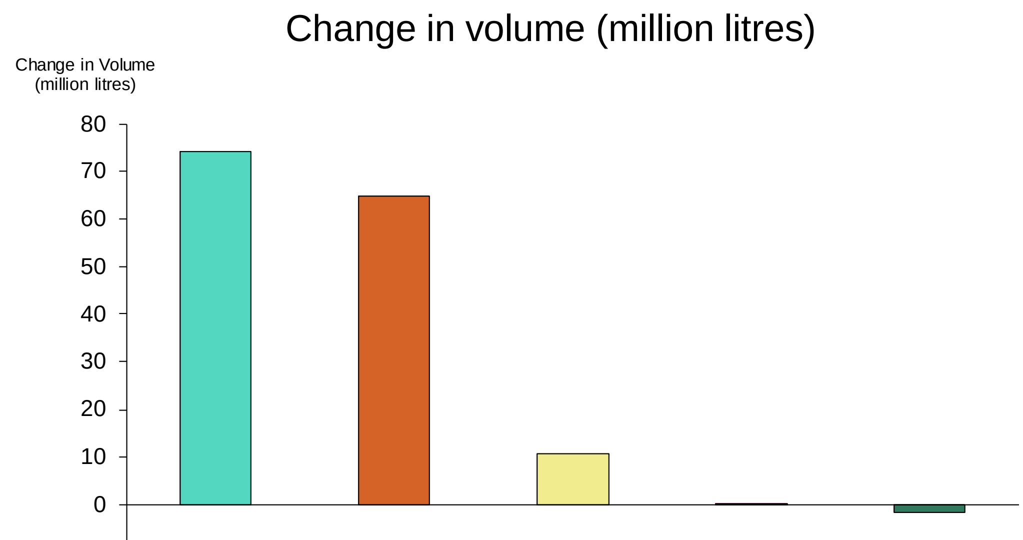


	France	Singapore	Sweden	Finland	Hong Kong	Belgium	Denmark	Japan	Netherlands	New Zealand	Germany	Canada	USA	China	UK
2018	4.8	6.4	6.5	7.5	8.1	9.0	10.3	15.6	19.0	31.4	39.6	68.3	159.6	176.0	245.6
2017	4.3	5.6	6.3	6.7	8.2	8.6	12.1	12.4	16.8	28.1	36.8	61.5	178.7	117.1	220.0

Exports by colour/ wine style

MAT June 2018





	Total exports	Red	White	Sparkling	Other
% change	10%	14.0%	3.6%	3.5%	-21%
Vol change	74.2	64.9	10.8	0.3	-1.7

Bottled wine exports report

Bottled exports by price point and destination

Value ('000 A$) for MAT June 2018

	$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 June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %
China	10,170	-3%	222,418	24%	144,208	48%	64,625	49%	129,498	43%	164,560	103%	191,666	200%	927,146	64%
USA	12,089	-23%	258,304	-8%	21,346	-11%	13,458	-12%	27,788	-5%	10,211	-1%	3,934	25%	347,129	-8%
UK	15,198	-45%	111,453	32%	23,175	-13%	11,287	-16%	16,329	-15%	5,054	-17%	2,368	-19%	184,865	2%
Canada	1,865	-42%	45,638	-2%	66,195	15%	17,621	-14%	20,106	-4%	2,863	19%	881	-54%	155,169	1%
New Zealand	2,627	145%	32,503	16%	18,261	1%	7,019	3%	6,294	2%	1,392	2%	1,495	192%	69,590	12%
Japan	964	82%	18,870	-6%	5,905	3%	3,364	-24%	5,238	12%	2,709	52%	4,567	1175%	41,616	11%
Netherlands	7,067	155%	12,846	-43%	2,114	-40%	560	-12%	846	4%	288	59%	105	63%	23,826	-22%
Hong Kong	36	-41%	9,126	-13%	8,626	0%	6,610	27%	19,261	-10%	24,782	29%	39,627	-17%	108,067	-4%
Singapore	286	15%	6,348	0%	6,115	58%	5,379	40%	17,493	-22%	24,558	105%	26,418	39%	86,596	28%
Germany	5,476	0%	8,301	-12%	2,461	15%	1,884	5%	2,671	10%	805	-6%	420	16%	22,017	-2%
Sweden	1,298	4%	10,120	7%	3,728	50%	2,549	9%	1,407	25%	459	25%	93	-8%	19,654	14%
Malaysia	163	-14%	5,274	8%	7,763	-1%	1,887	-18%	3,709	-71%	14,160	98%	10,301	-31%	43,257	-14%
Ireland	2,212	-12%	7,045	-30%	1,094	-51%	667	-29%	368	17%	251	83%	52	168%	11,689	-28%
United Arab Emirat	32	-34%	5,035	-13%	5,649	226%	2,440	67%	3,979	48%	4,496	80%	5,337	50%	26,968	51%
Denmark	1,267	172%	3,731	-16%	2,840	-8%	1,873	-39%	2,390	0%	1,256	28%	311	-17%	13,667	-8%
Thailand	308	-25%	4,941	-39%	2,372	17%	1,896	4%	1,572	-54%	2,463	109%	2,457	31%	16,009	-15%
Korea, R	0	-100%	3,792	50%	4,084	-4%	1,578	58%	3,783	26%	1,828	40%	590	51%	15,656	23%
Finland	474	269%	3,180	-16%	1,672	-31%	2,178	1%	2,209	42%	50	-84%	6	na	9,769	-5%
Taiwan Province	13	-57%	4,628	2%	1,258	-3%	732	-20%	1,979	-12%	3,163	51%	2,717	-30%	14,492	-4%
India	12	87%	5,533	139%	427	78%	80	8%	517	271%	159	544%	248	1780%	6,976	148%
Other	1,942	5%	34,488	-6%	14,768	16%	8,531	18%	16,039	6%	7,229	14%	5,320	-4%	88,316	3%
Total	63,499	-15%	813,575	4%	344,060	20%	156,217	13%	283,476	8%	272,737	73%	298,914	75%	2,232,476	19%

Bottled exports by price point and destination

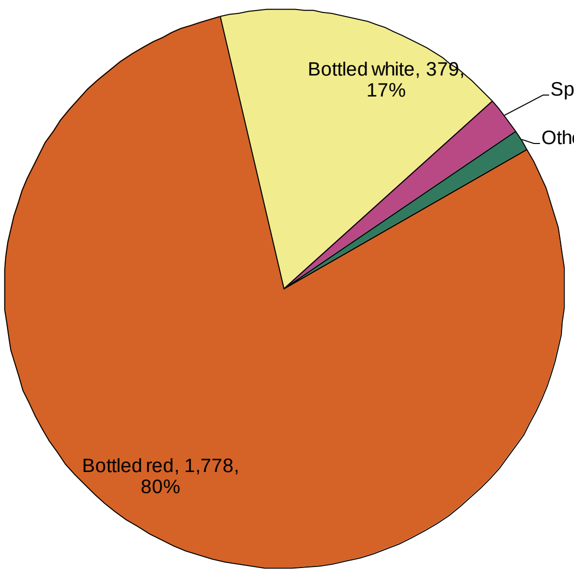
Volume (‘000 litres) for MAT June 2018

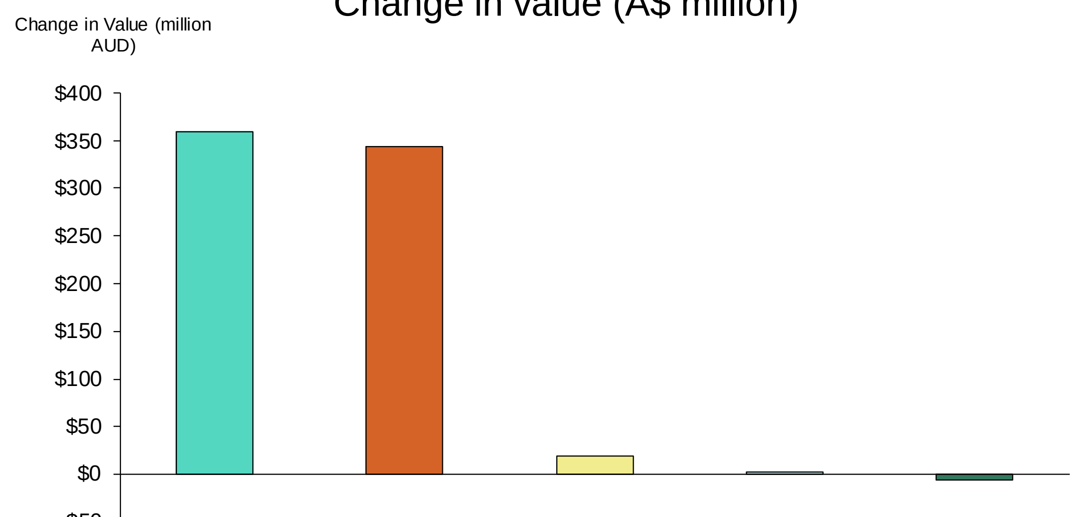
	$2.49 and under		$2.50 to $4.99		$5.00 to $7.49		$7.50 to $9.99		$10.00 to $19.99		$20.00 to $49.99		$50.00 and above		Total	
	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %
China	4,772	-1%	62,705	25%	24,951	53%	7,414	46%	10,069	46%	6,227	110%	2,424	196%	118,561	36%
USA	5,151	-21%	76,846	-5%	3,746	-10%	1,538	-11%	2,086	-9%	370	-3%	47	36%	89,783	-7%
UK	6,547	-47%	34,505	38%	3,893	-14%	1,307	-16%	1,288	-16%	178	-17%	20	-28%	47,739	6%
Canada	776	-42%	12,236	1%	11,147	17%	2,025	-15%	1,694	-2%	100	18%	11	-50%	27,989	3%
New Zealand	1,142	142%	9,120	16%	2,965	-2%	819	7%	508	6%	50	2%	22	239%	14,625	16%
Japan	440	86%	5,245	0%	971	1%	392	-24%	399	15%	93	41%	57	1041%	7,597	3%
Netherlands	3,784	196%	3,290	-52%	368	-39%	66	-9%	67	2%	10	75%	1	52%	7,587	-14%
Hong Kong	22	-19%	2,348	-12%	1,403	-2%	766	29%	1,534	-8%	878	29%	352	-29%	7,302	-4%
Singapore	139	20%	1,615	-2%	975	54%	619	37%	1,413	-21%	1,027	124%	348	30%	6,136	14%
Germany	2,802	-20%	2,415	0%	436	27%	219	6%	212	14%	28	-5%	3	-4%	6,115	-9%
Sweden	539	4%	2,786	3%	597	45%	287	8%	106	17%	15	16%	1	1%	4,332	8%
Malaysia	72	-15%	1,400	6%	1,331	2%	218	-18%	299	-64%	629	124%	115	-30%	4,063	-5%
Ireland	1,209	7%	2,033	-29%	179	-52%	75	-26%	32	22%	9	90%	1	121%	3,539	-22%
United Arab Emirat	15	-32%	1,348	-15%	927	234%	285	58%	330	65%	170	101%	59	57%	3,135	32%
Denmark	654	220%	1,033	-25%	458	-11%	219	-38%	183	3%	45	35%	3	-22%	2,595	-3%
Thailand	151	-14%	1,295	-45%	375	17%	226	7%	124	-53%	102	125%	30	3%	2,303	-33%
Korea, R	0	-100%	973	45%	719	-5%	185	55%	273	18%	61	31%	6	37%	2,216	13%
Finland	235	301%	819	-19%	270	-29%	256	2%	190	46%	2	-86%	0	na	1,771	-4%
Taiwan Province	6	-59%	1,152	2%	217	-1%	87	-19%	142	-16%	119	51%	27	-30%	1,749	0%
India	5	-49%	1,590	125%	72	86%	9	4%	44	288%	5	510%	4	2295%	1,730	123%
Other	919	14%	9,282	-8%	2,493	15%	980	17%	1,257	11%	259	11%	62	-12%	15,253	-1%
Total	29,380	-13%	234,035	6%	58,493	21%	17,993	12%	22,249	10%	10,378	80%	3,592	77%	376,121	8%

Bottled exports by colour/ wine style

Value

MAT June 2018



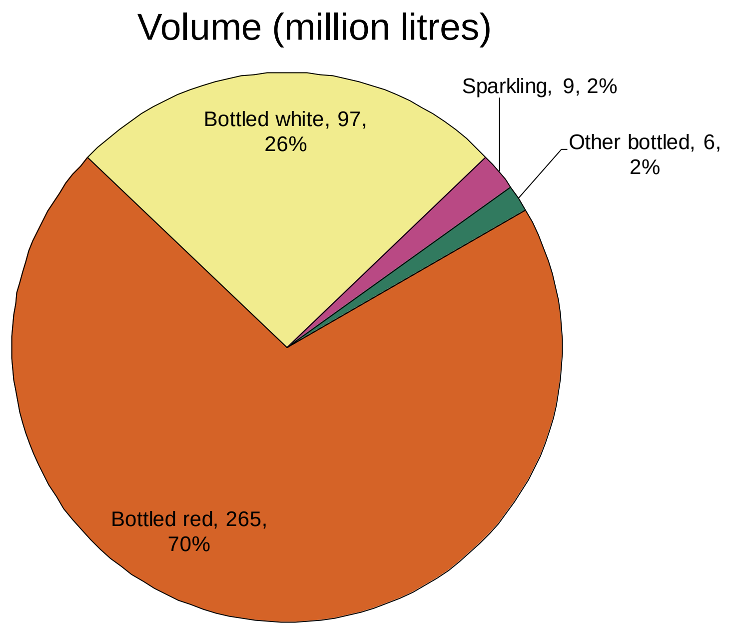


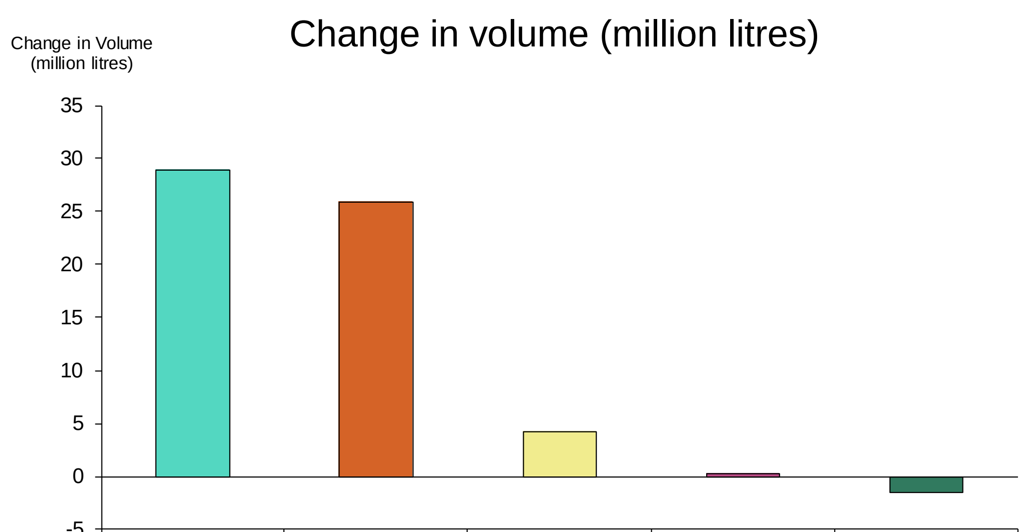
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	19.2%	23.9%	5.3%	5.3%	-18.1%
Vol change	359.0	343.4	19.1	2.4	-6.0

Bottled exports by colour/ wine style

Volume

MAT June 2018





	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	8.3%	10.8%	4.6%	3.8%	-20.9%
Vol change	28.9	25.9	4.3	0.3	-1.5

Bottled exports by colour/ wine style

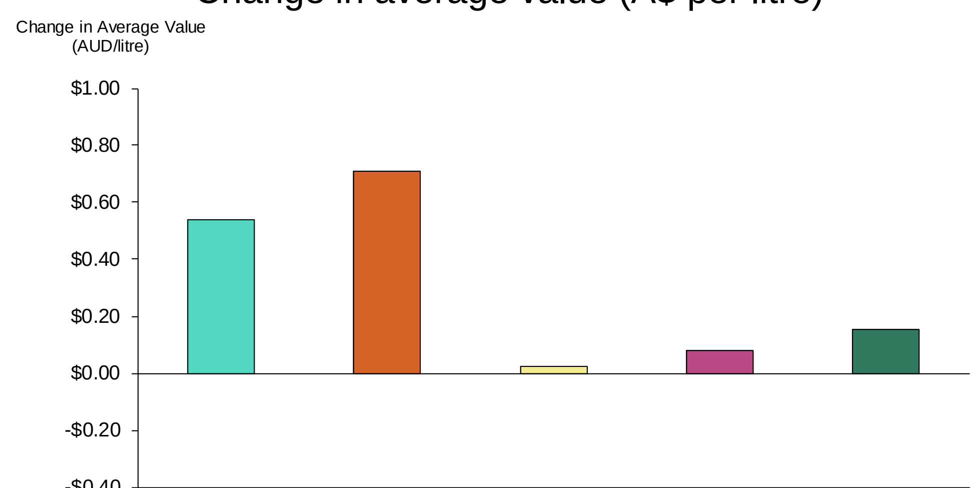
Average value

MAT June 2018

Average value (A$ per litre)

	Bottled red	Bottled white	Sparkling	Other bottled
2018	$6.71	$3.91	$5.70	$4.60

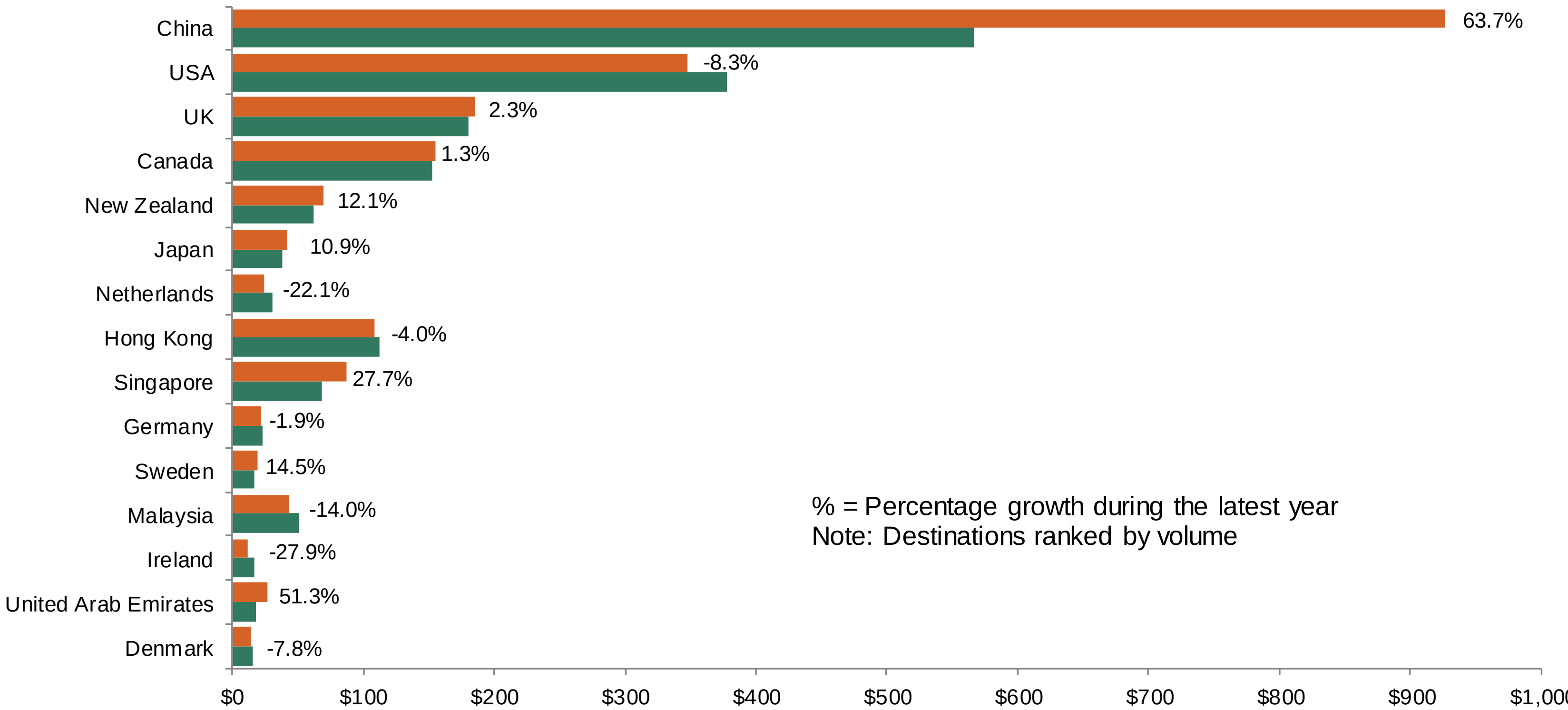
Change in average value (A$ per litre)



	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	10.0%	11.8%	0.7%	1.4%	3.5%
Av. Val change	$0.54	$0.71	$0.03	$0.08	$0.15

Bottled exports by top 15 destinations

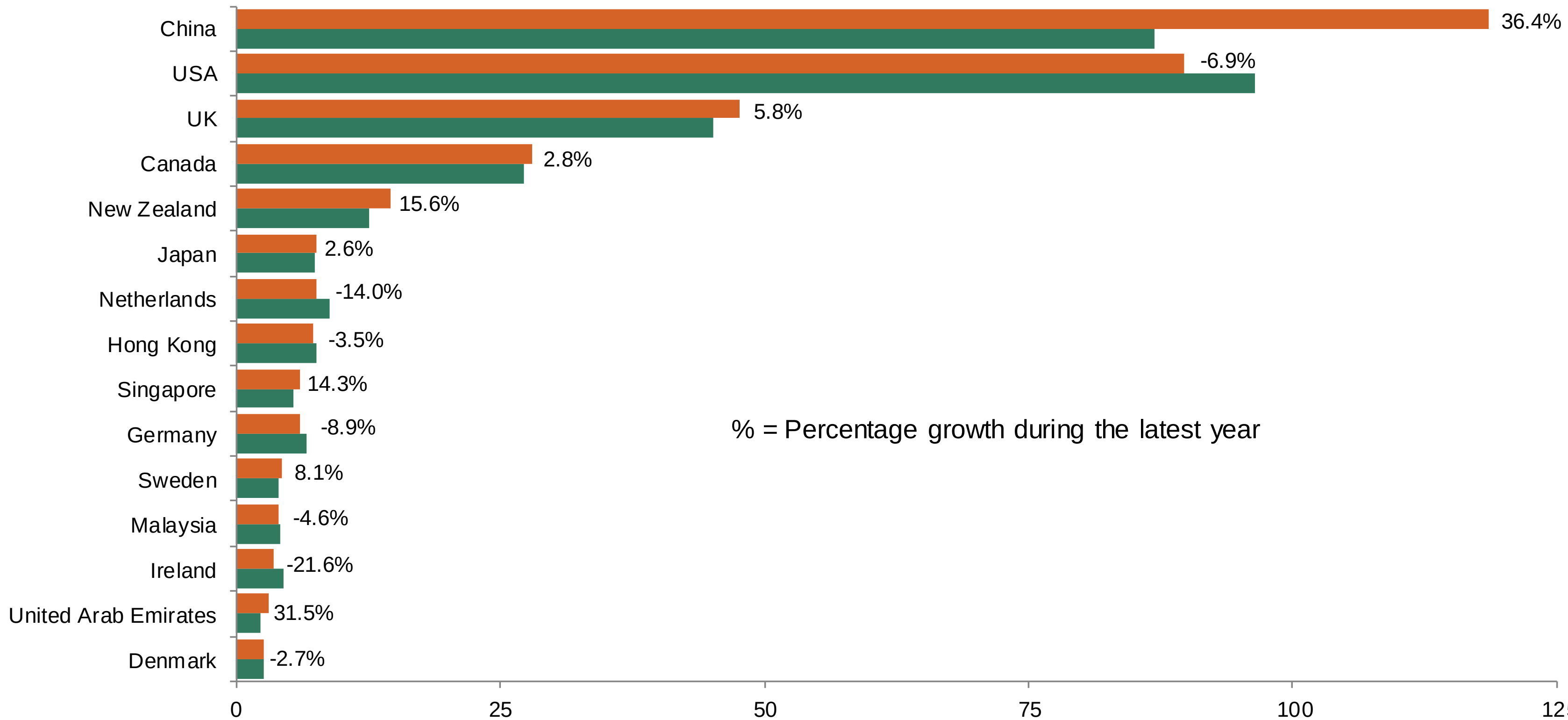
Value (million A$) for MAT June 2018



	Denmark	United Arab Emirates	Ireland	Malaysia	Sweden	Germany	Singapore	Hong Kong	Netherlands	Japan	New Zealand	Canada	UK	USA	China
2018	13.7	27.0	11.7	43.3	19.7	22.0	86.6	108.1	23.8	41.6	69.6	155.2	184.9	347.1	927.1
2017	14.8	17.8	16.2	50.3	17.2	22.5	67.8	112.5	30.6	37.5	62.1	153.1	180.7	378.5	566.4

Bottled exports by top 15 destinations

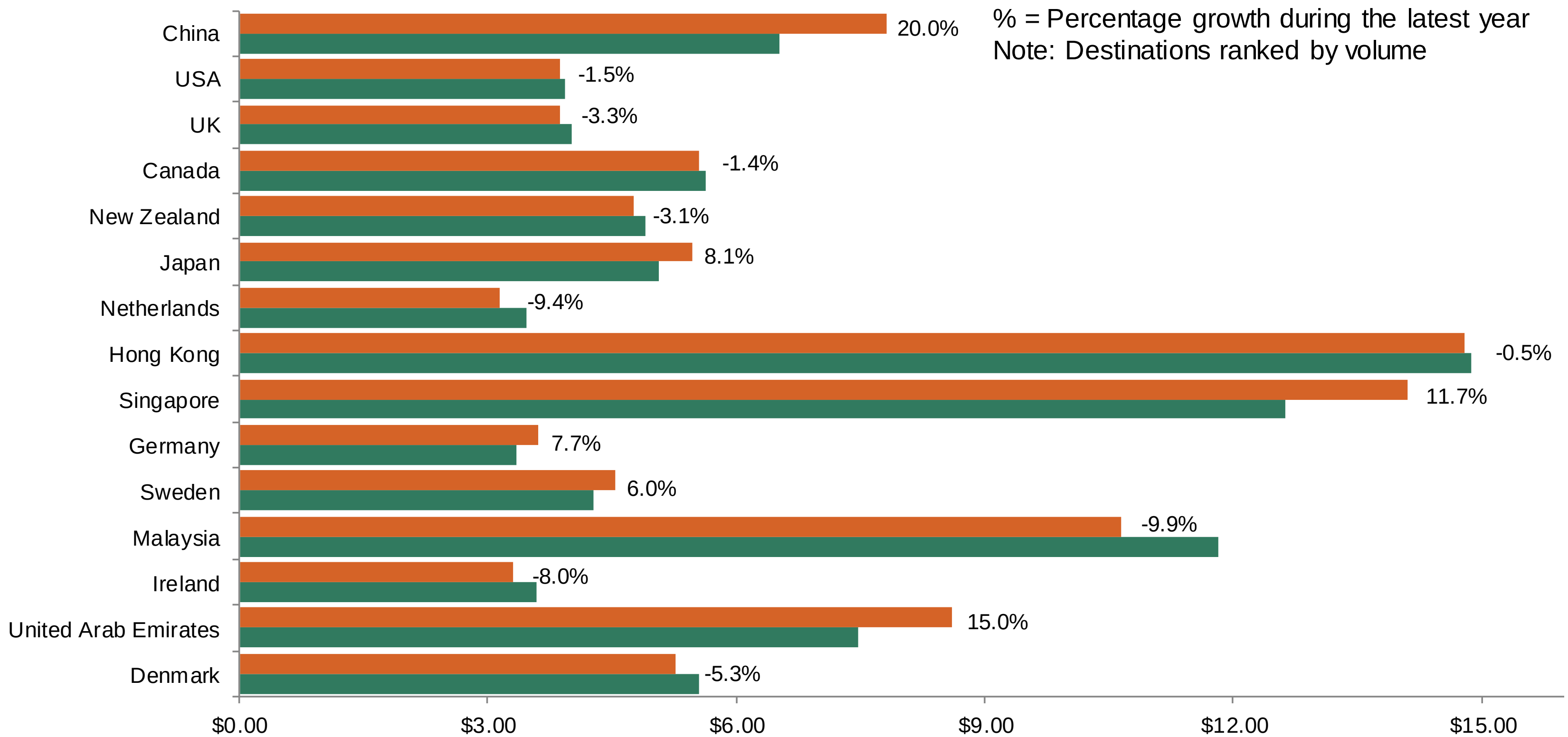
Volume (million litres) for MAT June 2018



	Denmark	United Arab Emirates	Ireland	Malaysia	Sweden	Germany	Singapore	Hong Kong	Netherlands	Japan	New Zealand	Canada	UK	USA	China
2018	2.6	3.1	3.5	4.1	4.3	6.1	6.1	7.3	7.6	7.6	14.6	28.0	47.7	89.8	118.6
2017	2.7	2.4	4.5	4.3	4.0	6.7	5.4	7.6	8.8	7.4	12.7	27.2	45.1	96.4	86.9

Bottled exports by top 15 destinations

Average value (A$ per litre) for MAT June 2018



	Denmark	United Arab Emirates	Ireland	Malaysia	Sweden	Germany	Singapore	Hong Kong	Netherlands	Japan	New Zealand	Canada	UK	USA	China
2018	$5.27	$8.60	$3.30	$10.65	$4.54	$3.60	$14.11	$14.80	$3.14	$5.48	$4.76	$5.54	$3.87	$3.87	$7.82
2017	$5.56	$7.48	$3.59	$11.81	$4.28	$3.34	$12.63	$14.87	$3.46	$5.07	$4.91	$5.62	$4.00	$3.93	$6.52

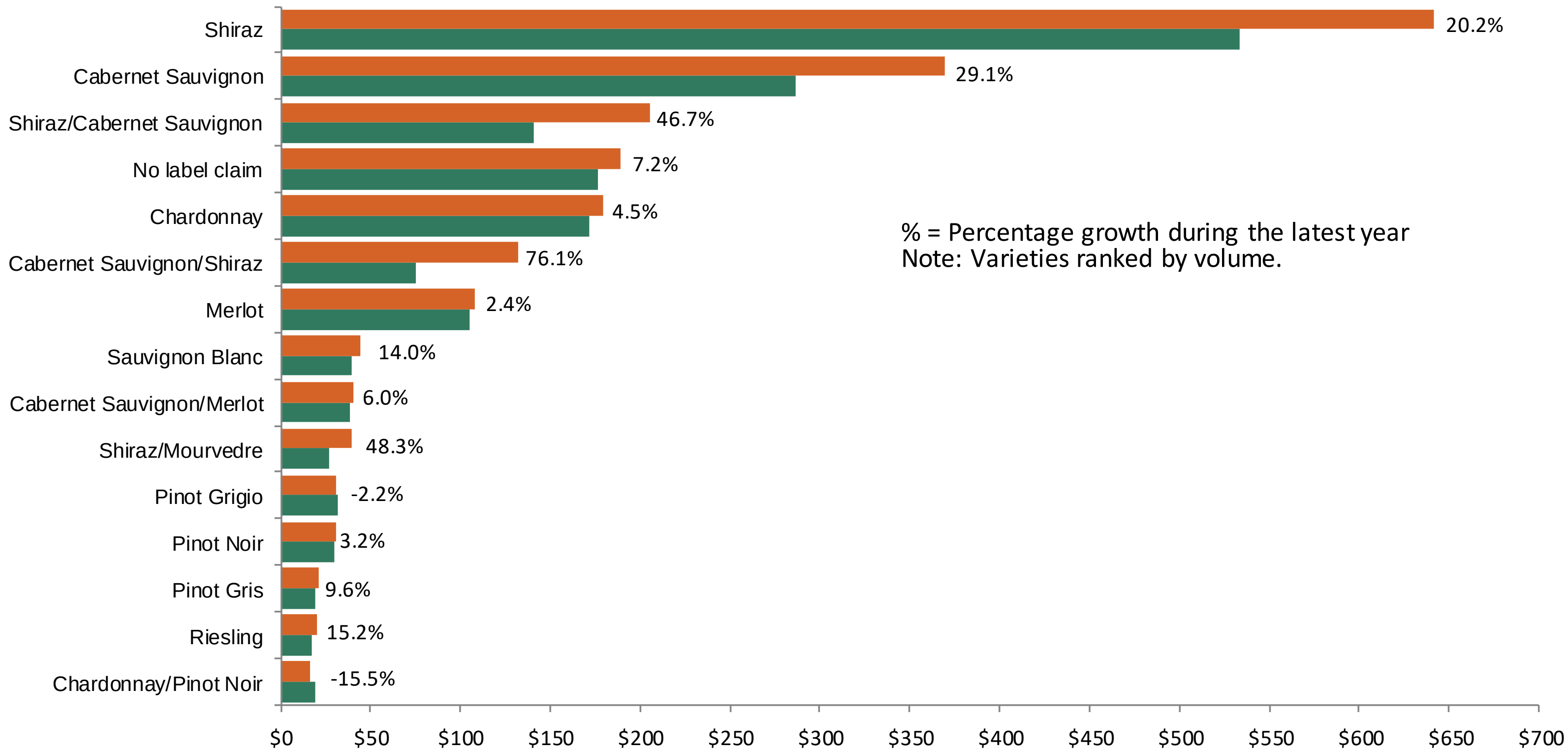
Bottled exports by top 15 variety label claims

MAT June 2018

Top 15 variety label claims	Volume (million litres)		Value (A$ million FOB)		Average value ($A per litre FOB)	
	2018	Change	2018	Change	2018	Change
Shiraz	90.89	13%	641.61	20%	7.06	6%
Cabernet Sauvignon	52.94	12%	369.41	29%	6.98	15%
Shiraz/Cabernet Sauvignon	34.20	12%	205.90	47%	6.02	30%
No label claim	40.62	12%	189.23	7%	4.66	-4%
Chardonnay	47.37	4%	179.63	5%	3.79	0%
Cabernet Sauvignon/Shiraz	5.64	26%	132.06	76%	23.42	40%
Merlot	27.80	2%	107.72	2%	3.87	0%
Sauvignon Blanc	12.67	15%	44.51	14%	3.51	-1%
Cabernet Sauvignon/Merlot	8.94	7%	40.67	6%	4.55	-1%
Shiraz/Mourvedre	2.01	22%	39.80	48%	19.81	21%
Pinot Grigio	8.65	0%	30.75	-2%	3.55	-3%
Pinot Noir	5.44	-1%	30.55	3%	5.61	5%
Pinot Gris	6.33	9%	20.81	10%	3.28	1%
Riesling	3.44	4%	20.15	15%	5.85	11%
Chardonnay/Pinot Noir	3.02	-13%	15.99	-16%	5.29	-3%

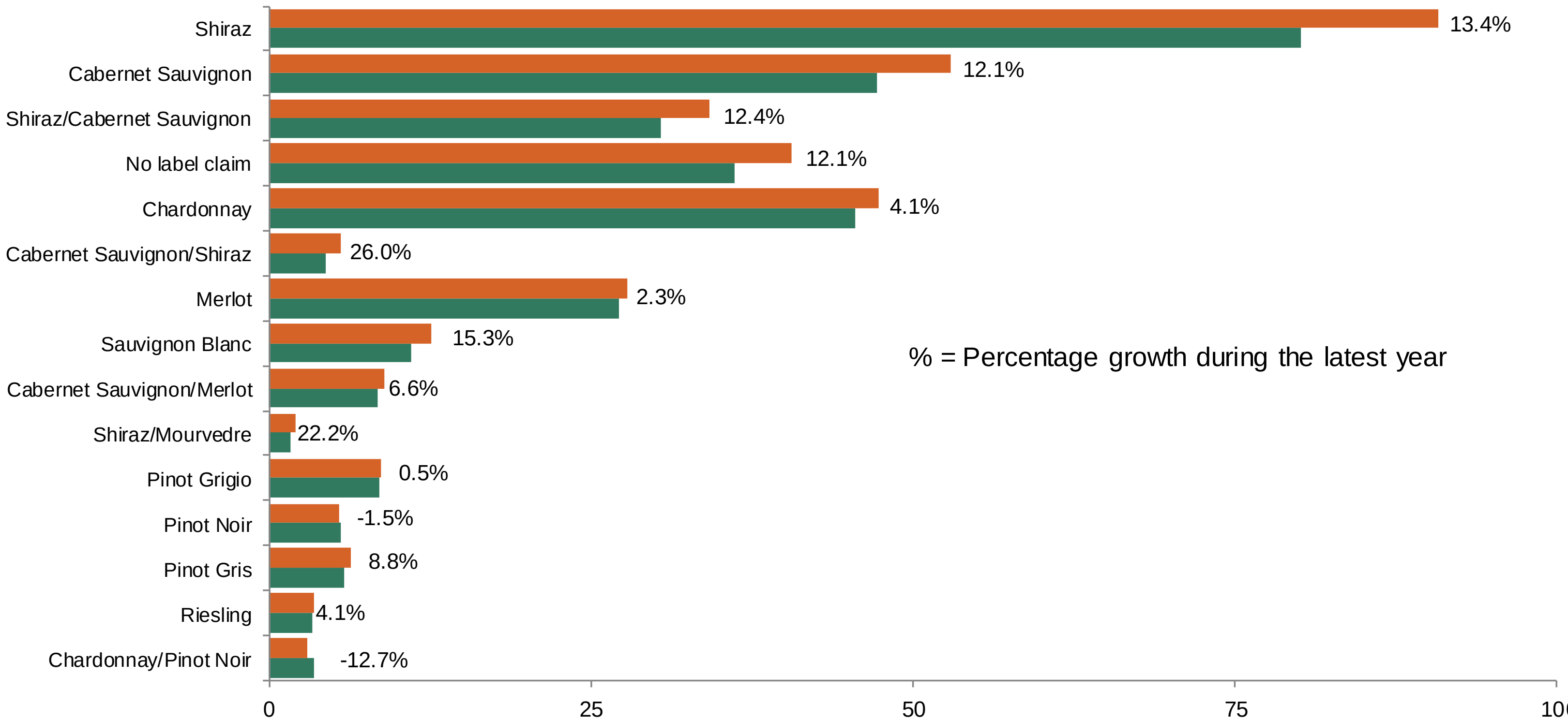
Bottled exports by top 15 variety label claims

Value (million A$) for MAT June 2018



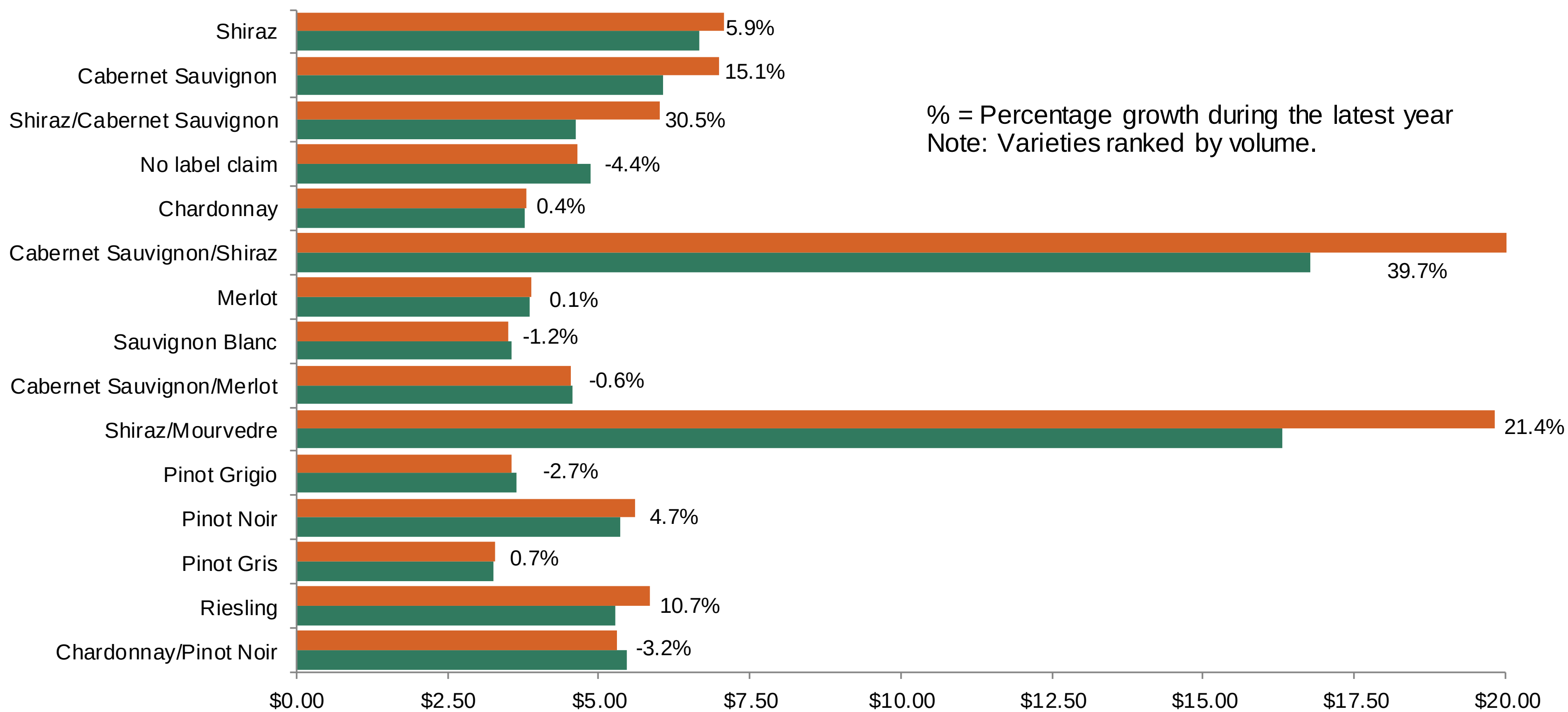
Bottled exports by top 15 variety label claims

Volume (million litres) for MAT June 2018



Bottled exports by top 15 variety label claims

Average Value (A$ per litre) for MAT June 2018



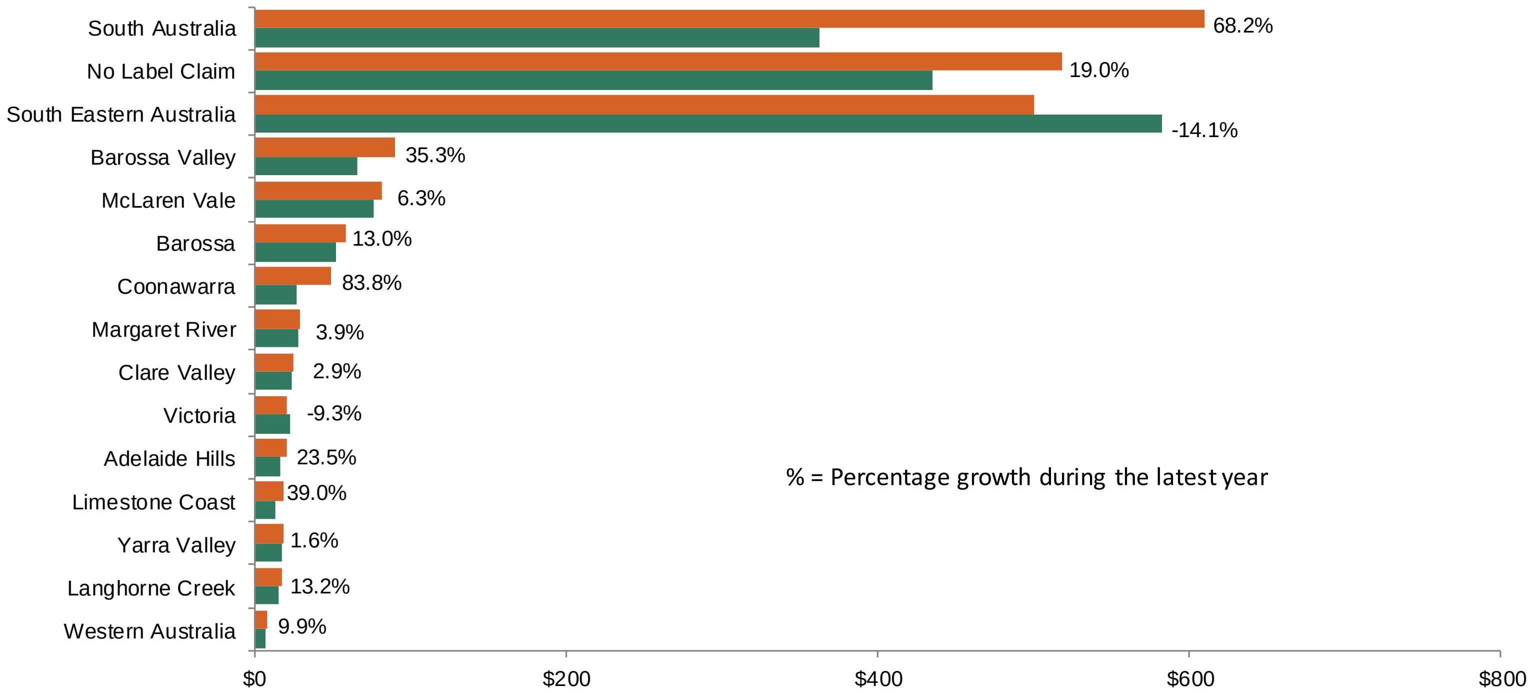
Bottled exports by top 15 GI region label claims

MAT June 2018

Top 15 GI label claims	Volume (million litres)		Value (A$ million FOB)		Average value ($A per litre FOB)	
	2018	Change	2018	Change	2018	Change
South Australia	60.88	30%	610.15	68%	10.02	29%
No Label Claim	106.52	30%	518.39	19%	4.87	-9%
South Eastern Australia	145.37	-13%	500.69	-14%	3.44	-2%
Barossa Valley	4.92	17%	89.76	35%	18.23	16%
McLaren Vale	7.07	1%	81.18	6%	11.48	5%
Barossa	5.13	3%	58.97	13%	11.49	10%
Coonawarra	3.70	37%	48.88	84%	13.21	34%
Margaret River	2.47	6%	29.52	4%	11.94	-2%
Clare Valley	3.07	19%	24.92	3%	8.12	-14%
Victoria	3.26	-12%	20.45	-9%	6.27	3%
Adelaide Hills	2.06	12%	20.18	23%	9.79	10%
Limestone Coast	3.11	48%	18.44	39%	5.93	-6%
Yarra Valley	1.30	-4%	18.13	2%	13.98	6%
Langhorne Creek	1.98	4%	17.76	13%	8.97	9%
Western Australia	1.21	3%	8.10	10%	6.72	6%

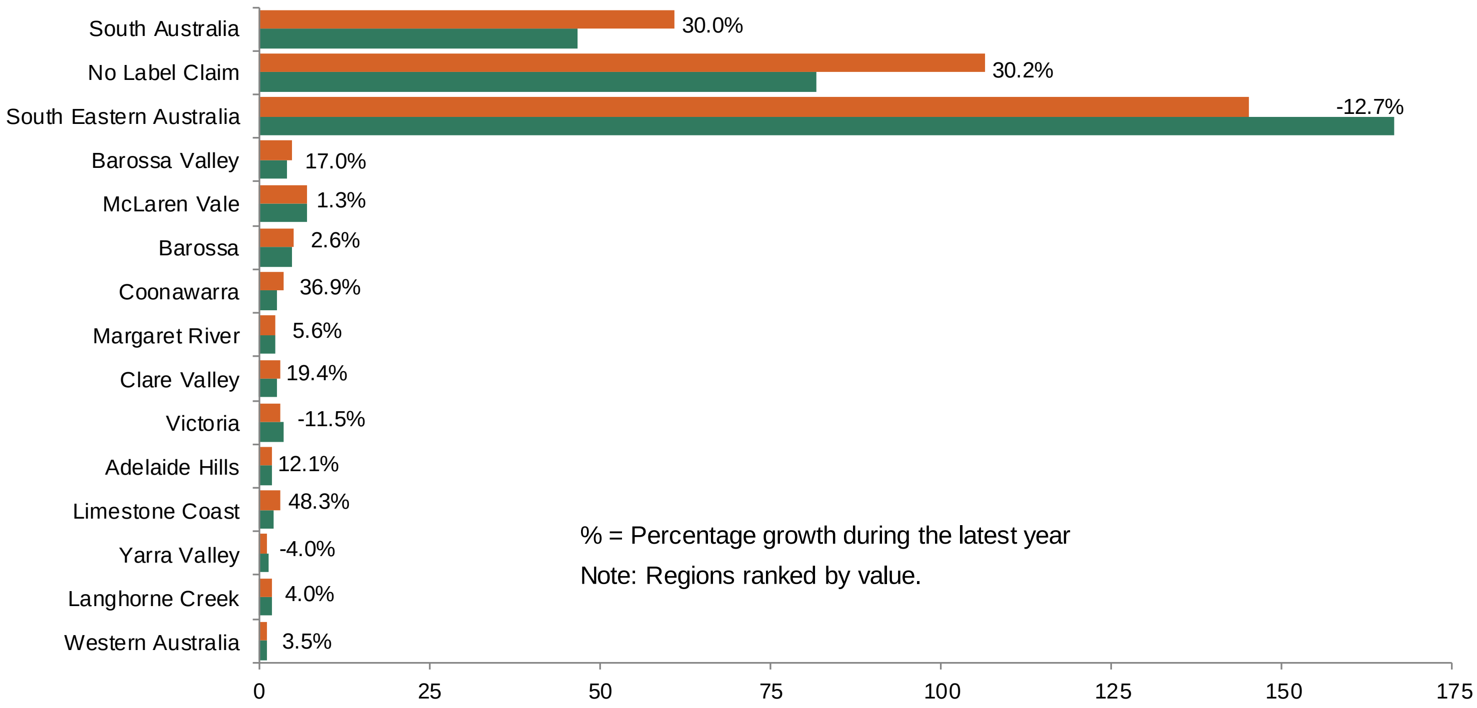
Bottled exports
by top 15 GI region label claims

Value (million A$) for MAT June 2018



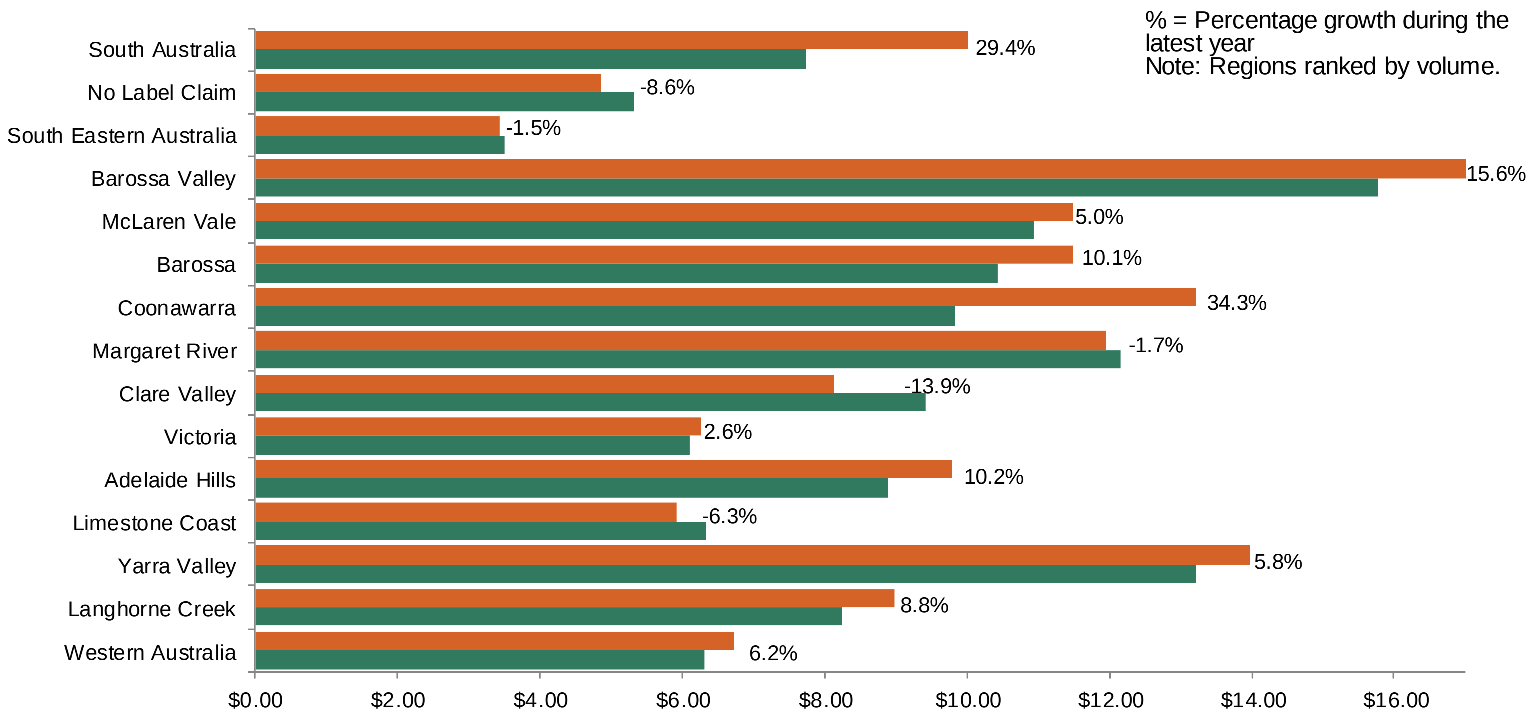
Bottled exports by top 15 GI region label claims

Volume (million litres) for MAT June 2018



Bottled exports
by top 15 GI region label claims

Average Value (A$ per litre) for MAT June 2018

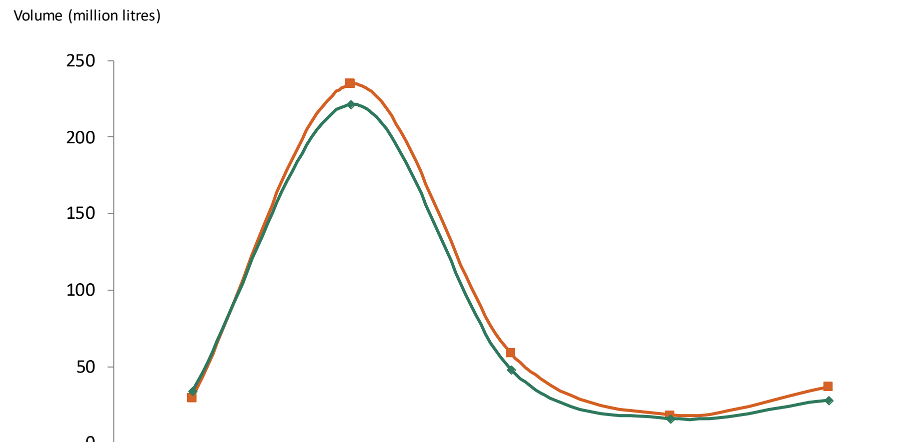


Bottled exports by price point

Volume

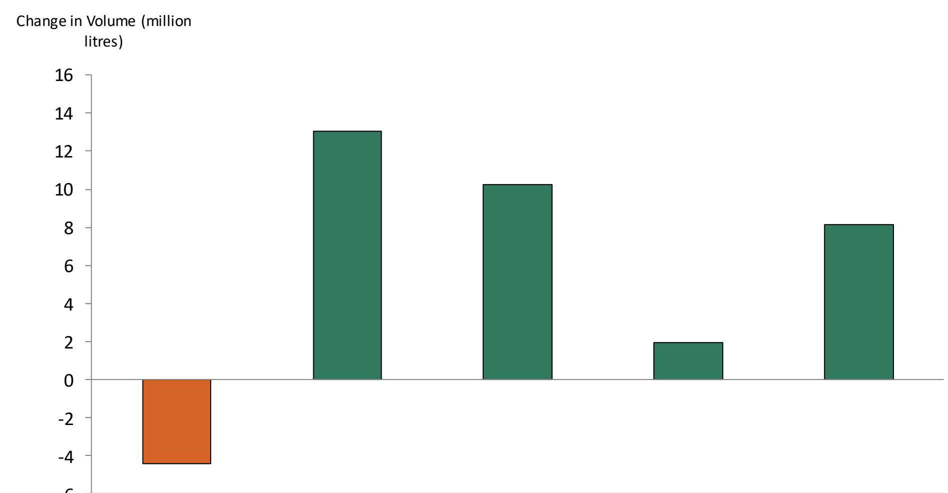
MAT June 2018

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
2018	29	234	58	18	36
2017	34	221	48	16	28

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	-13.1%	5.9%	21.2%	12.1%	28.9%
Vol change	-4.4	13.1	10.2	1.9	8.1

Bulk wine exports report

Bulk wine exports by price point and destination

Value (‘000 A$) for MAT June 2018

	$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 June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %	MAT June 2018 ('000 AUD)	Change %
UK	55	-31%	99,157	8%	80,585	97%	8,555	-43%	2,870	-59%	7,716	33%	198,938	24%
USA	-	na	35,012	-12%	24,256	-31%	11,915	102%	1,728	78%	3,981	82%	76,892	-9%
China	-	na	4,122	-72%	51,597	476%	7,591	176%	7,767	85%	5,637	-11%	76,714	106%
Canada	-	na	13,394	-40%	26,534	233%	507	180%	225	1148%	-	-100%	40,659	32%
Germany	-	na	16,839	-10%	14,163	90%	197	-34%	1,104	324%	4,250	na	36,553	36%
New Zealand	71	na	6,426	-5%	6,158	33%	564	19%	169	50%	4,144	448%	17,532	38%
Netherlands	-	-100%	5,941	33%	4,954	85%	159	331%	-	na	-	-100%	11,055	53%
Denmark	21	na	2,329	-63%	4,162	721%	1,069	16%	301	-5%	293	-27%	8,175	-3%
Belgium	-	na	4,416	3%	2,315	39%	322	263%	-	-100%	-	na	7,052	16%
Finland	-	na	2,557	5%	2,700	12%	1,192	424%	51	na	531	38%	7,031	29%
Japan	-	na	2,101	33%	3,374	733%	629	56%	-	-100%	245	-57%	6,348	85%
France	-	na	1,054	-56%	3,381	252%	551	79%	50	-2%	249	87%	5,285	37%
Sweden	-	na	137	-48%	970	59%	859	-10%	1,262	-30%	503	529%	3,731	0%
Switzerland	-	na	860	116%	549	50%	-	-100%	101	5%	-	-100%	1,509	42%
Thailand	-	na	216	-37%	979	143%	108	na	-	-100%	-	na	1,303	69%
Spain	-	na	909	216%	370	-8%	-	na	-	na	-	na	1,279	85%
Italy	-	na	977	147%	-	-100%	237	-34%	2	na	49	343%	1,265	-92%
Norway	-	na	-	-100%	862	26%	-	na	-	na	-	na	862	5%
Other	-	na	1,032	345%	420	4%	197	-39%	-	na	403	-74%	2,052	-19%
Total	146	48%	197,479	-10%	228,330	73%	34,652	23%	15,630	2%	28,001	51%	504,238	22%

Bulk wine exports by price point and destination

Volume ('000 litres) for MAT June 2018

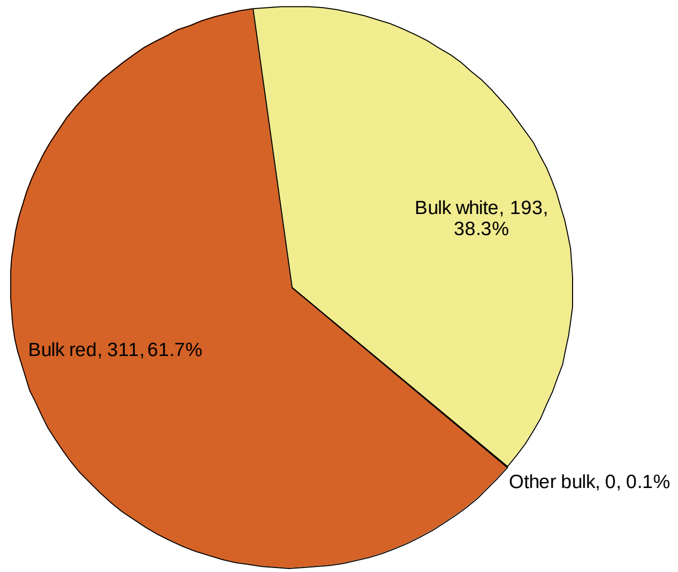
	$0.50 and under		$0.50 to $1.00		$1.00 to $1.50		$1.50 to $2.00		$2.00 to $2.50		$2.50 and above		Total	
	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %	MAT June 2018 ('000 Litres)	Change %
UK	147	-33%	119,627	-4%	69,569	93%	4,991	-42%	1,314	-59%	2,245	32%	197,893	13%
USA	-	na	40,603	-15%	19,794	-33%	7,508	121%	840	106%	958	63%	69,703	-15%
China	-	na	4,581	-73%	43,046	482%	4,596	188%	3,480	91%	1,451	-9%	57,153	93%
Canada	-	na	15,568	-40%	23,712	220%	310	176%	110	1119%	-	-100%	39,699	18%
Germany	-	na	19,440	-16%	12,021	80%	120	-29%	552	360%	1,368	na	33,500	11%
New Zealand	252	na	9,475	-9%	5,275	36%	348	21%	72	50%	770	247%	16,192	9%
Netherlands	-	-100%	7,136	31%	4,155	72%	100	316%	-	na	-	-100%	11,391	43%
Denmark	96	na	2,808	-66%	3,973	728%	619	13%	131	-9%	72	-25%	7,700	-19%
Belgium	-	na	5,362	4%	2,025	35%	194	275%	-	-100%	-	na	7,580	12%
Finland	-	na	2,695	7%	2,233	5%	667	440%	25	na	148	41%	5,769	18%
Japan	-	na	2,368	35%	2,907	653%	365	58%	-	-100%	72	-57%	5,712	106%
France	-	na	1,199	-59%	2,934	235%	316	84%	24	-7%	58	60%	4,531	12%
Sweden	-	na	143	-50%	769	50%	503	-9%	618	-30%	180	959%	2,212	-2%
Switzerland	-	na	1,128	135%	408	31%	-	-100%	48	0%	-	-100%	1,584	69%
Spain	-	na	1,224	240%	312	-13%	-	na	-	na	-	na	1,536	113%
Italy	-	na	1,180	192%	-	-100%	144	-33%	1	na	18	327%	1,343	-90%
Portugal	-	na	1,200	na	-	na	-	na	-	na	-	na	1,200	na
Thailand	-	na	240	-33%	791	175%	72	na	-	-100%	-	na	1,103	67%
Other	-	na	216	-47%	1,059	13%	120	-38%	-	na	104	-61%	1,499	-17%
Total	495	86%	236,193	-15%	194,983	70%	20,972	28%	7,214	3%	7,443	52%	467,300	11%

Bulk exports by colour/ wine style

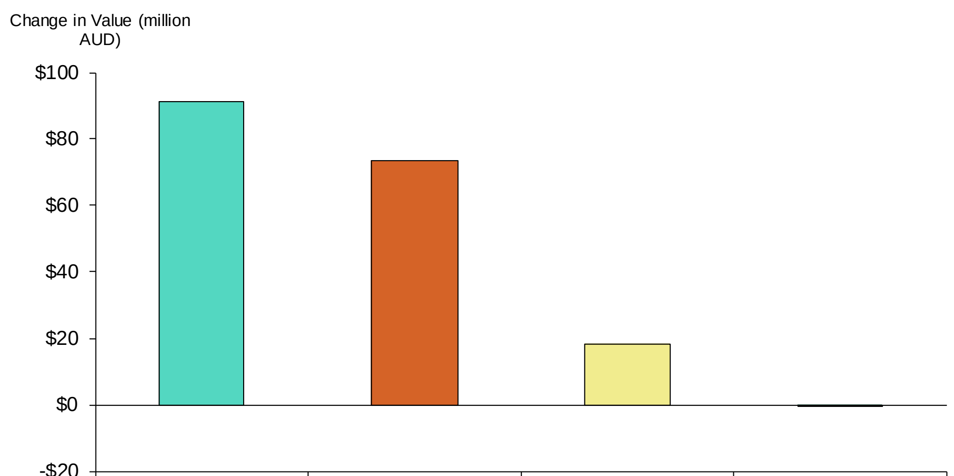
Value

MAT June 2018

Value (A$ million)



Change in Value (A$ million)



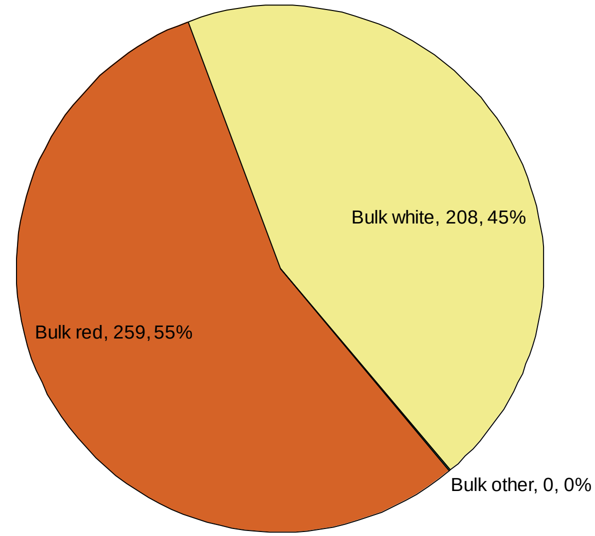
	Total Bulk	Bulk red	Bulk white	Other bulk
% change	22.1%	31.0%	10.5%	-59.0%
Val change	91.4	73.5	18.3	-0.4

Bulk exports by colour/ wine style

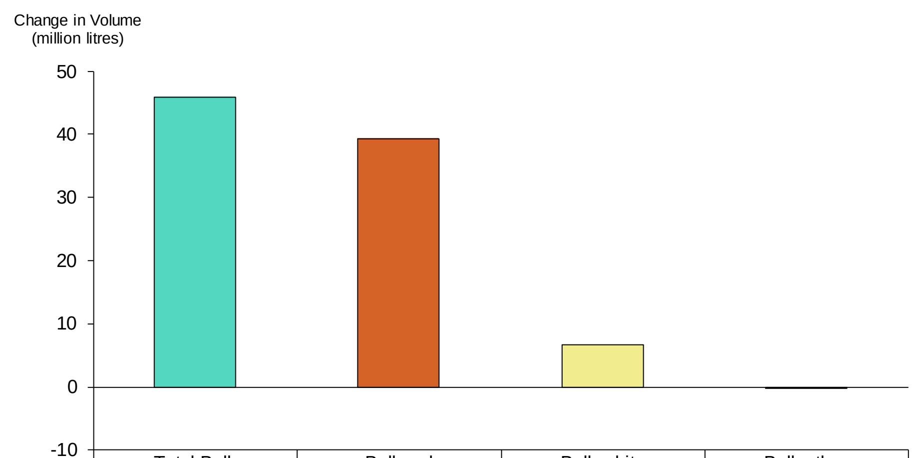
Volume

MAT June 2018

Volume (million litres)



Change in Volume (million litres)

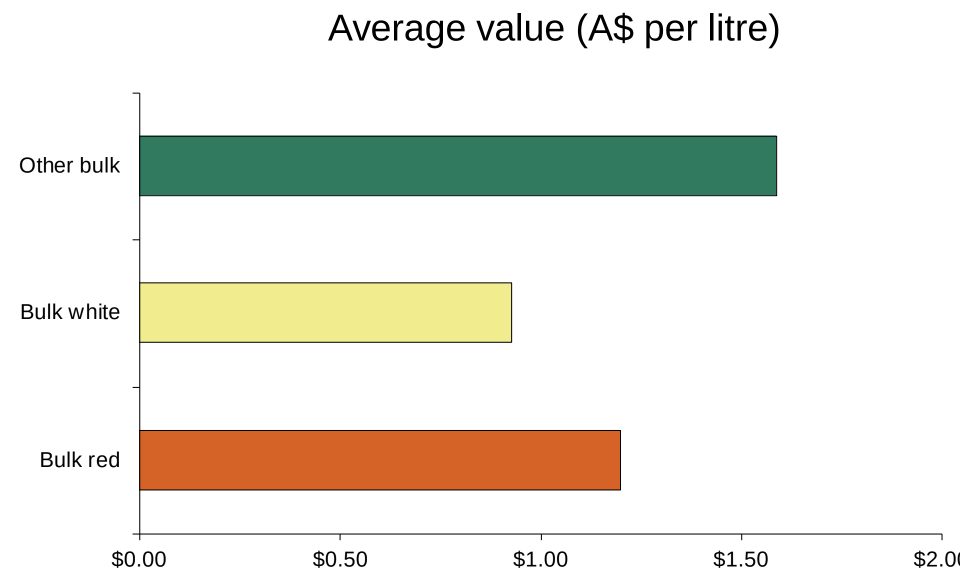


	Total Bulk	Bulk red	Bulk white	Bulk other
% change	11%	18%	3%	-50%
Vol change	45.8	39.3	6.7	-0.2

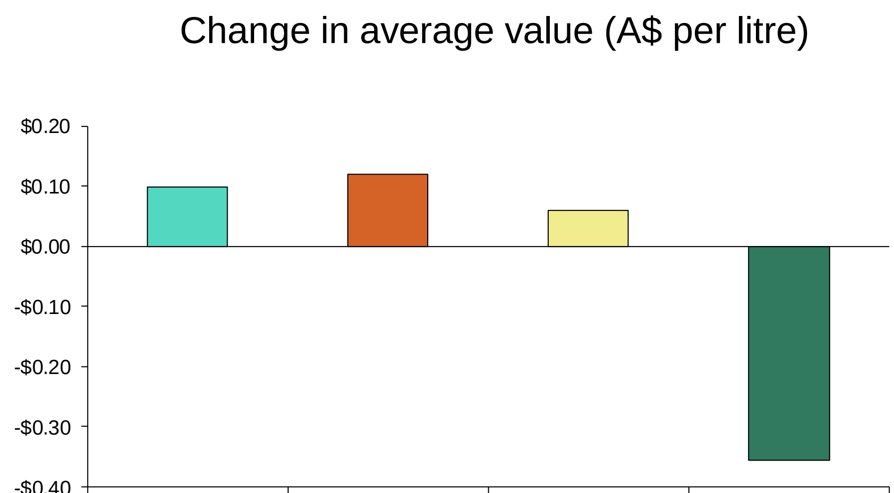
Bulk exports by colour/ wine style

Average value

MAT June 2018



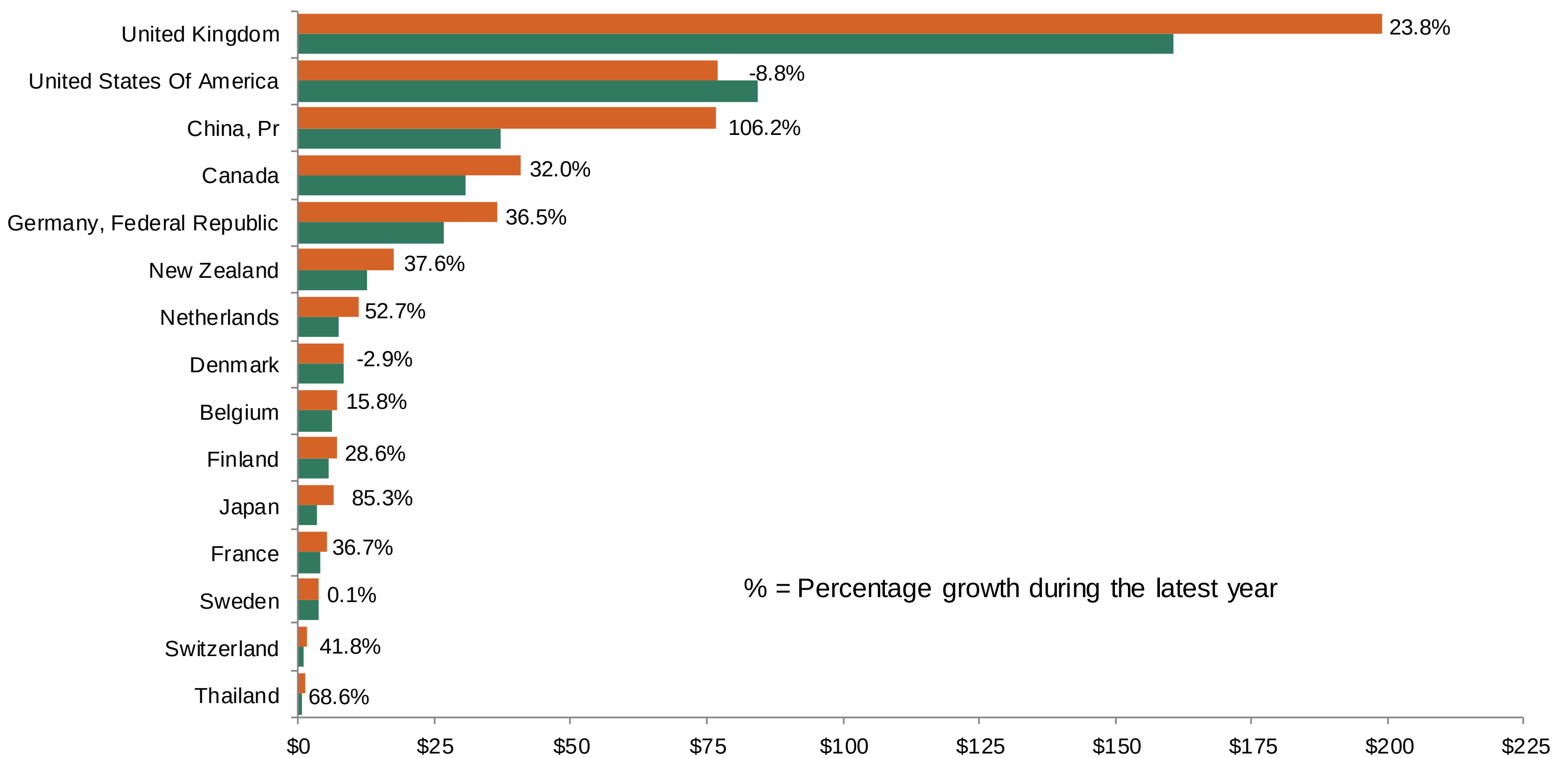
	Bulk red	Bulk white	Other bulk
2018	$1.20	$0.93	$1.59



	Total Bulk	Bulk red	Bulk white	Other bulk
% change	10.2%	11.1%	6.9%	-18.3%
Av. Val change	$0.10	$0.12	$0.06	-$0.36

Bulk exports by top 15 destinations

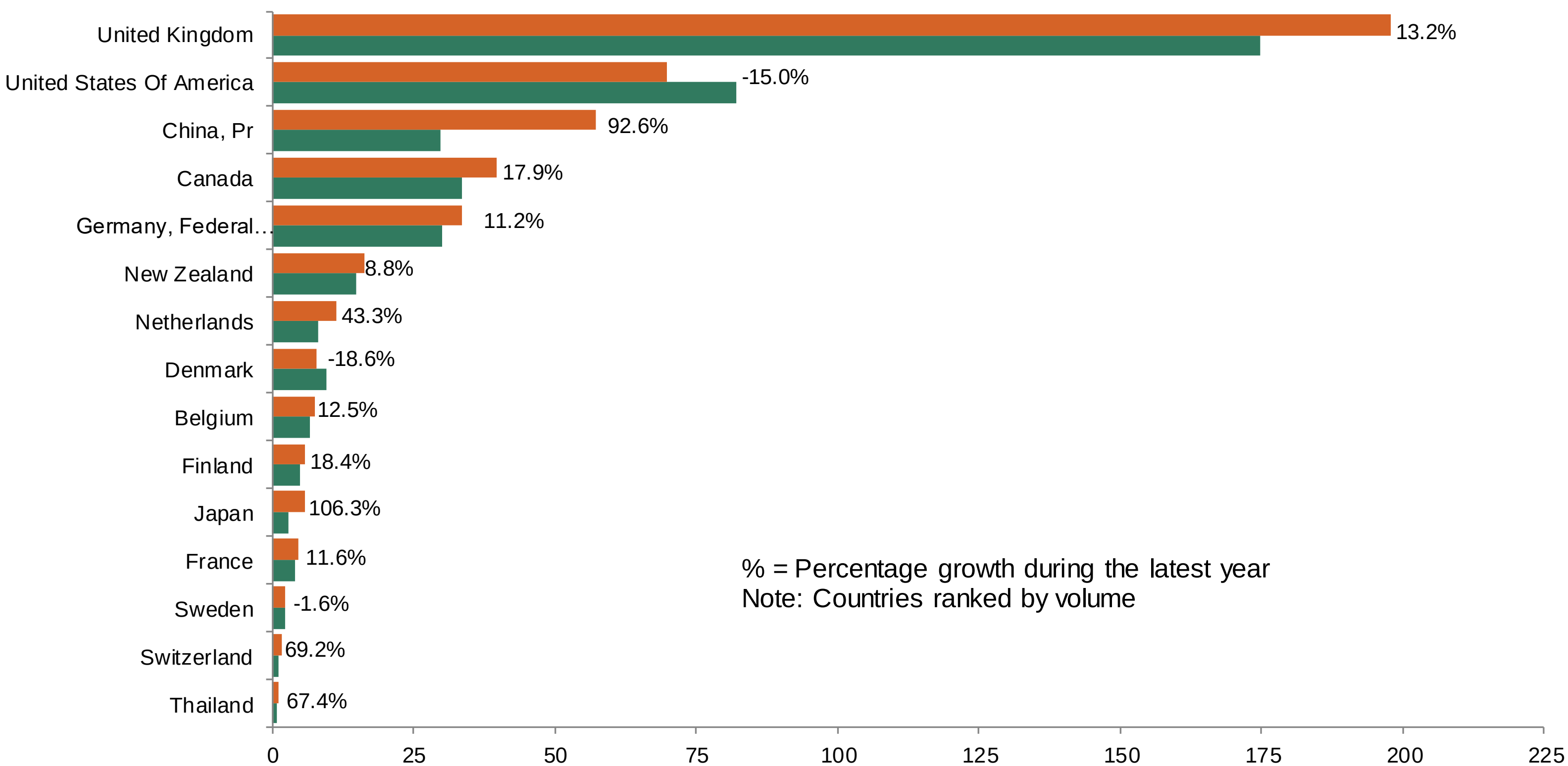
Value (million A$) for MAT June 2018



	Thailand	Switzerland	Sweden	France	Japan	Finland	Belgium	Denmark	Netherlands	New Zealand	Germany, Federal Republic	Canada	China, Pr	United States Of America	United Kingdom
2018	1.3	1.5	3.7	5.3	6.3	7.0	7.1	8.2	11.1	17.5	36.6	40.7	76.7	76.9	198.9
2017	0.8	1.1	3.7	3.9	3.4	5.5	6.1	8.4	7.2	12.7	26.8	30.8	37.2	84.3	160.8

Bulk exports by top 15 destinations

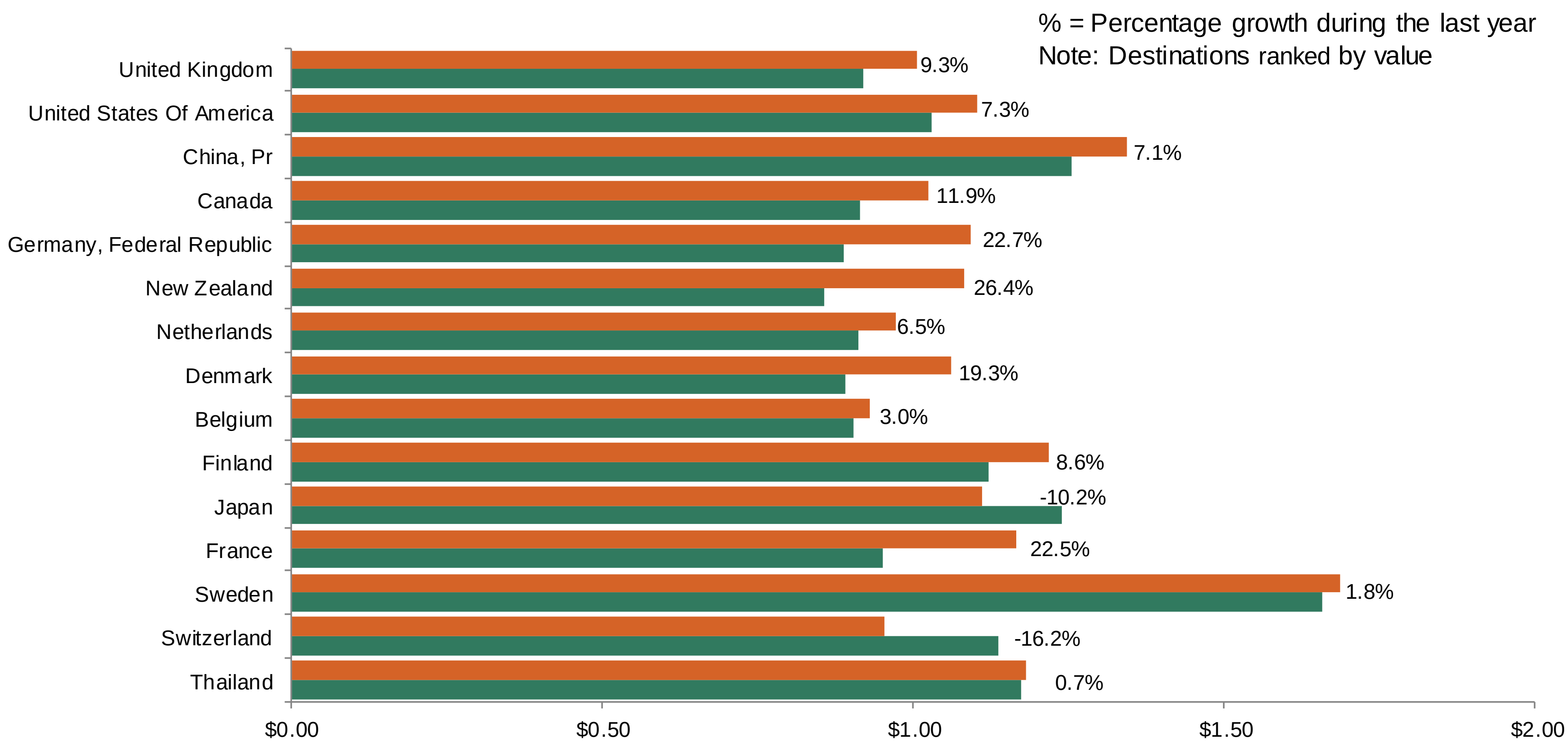
Volume (million litres) for MAT June 2018



	Thailand	Switzerland	Sweden	France	Japan	Finland	Belgium	Denmark	Netherlands	New Zealand	Germany, Federal Republic	Canada	China, Pr	United States Of America	United Kingdom
2018	1.1	1.6	2.2	4.5	5.7	5.8	7.6	7.7	11.4	16.2	33.5	39.7	57.2	69.7	197.9
2017	0.7	0.9	2.2	4.1	2.8	4.9	6.7	9.5	7.9	14.9	30.1	33.7	29.7	82.0	174.8

Bulk exports by top 15 destinations

Average Value (A$ per litre) for MAT June 2018



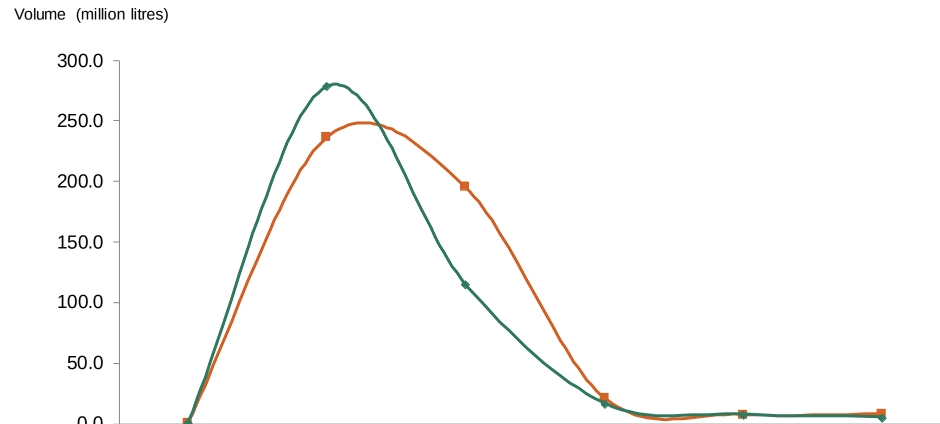
	Thailand	Switzerland	Sweden	France	Japan	Finland	Belgium	Denmark	Netherlands	New Zealand	Germany, Federal Republic	Canada	China, Pr	United States Of America	United Kingdom
2018	$1.18	$0.95	$1.69	$1.17	$1.11	$1.22	$0.93	$1.06	$0.97	$1.08	$1.09	$1.02	$1.34	$1.10	$1.01
2017	$1.17	$1.14	$1.66	$0.95	$1.24	$1.12	$0.90	$0.89	$0.91	$0.86	$0.89	$0.92	$1.25	$1.03	$0.92

Bulk exports by price point

Volume

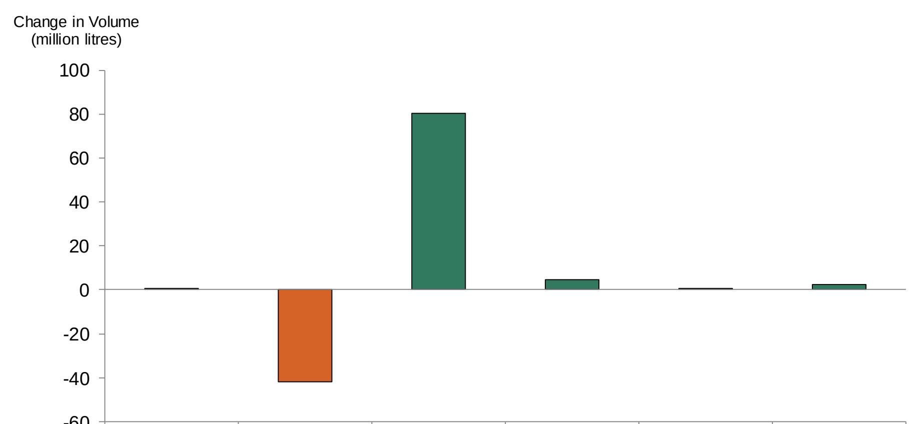
MAT June 2018

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
2018	0.5	236.2	195.0	21.0	7.2	7.4
2017	0	278	115	16	7	5

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	85.7%	-15.1%	69.9%	28.4%	2.9%	51.9%
Vol change	0.2	-42.0	80.2	4.6	0.2	2.5

Notes & Definitions

- **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