Wine Australia providing insights on Australian Wine

Export Report

Moving Annual Total (MAT)

To March 2018

Contents

Summary Report

Executive summary

- Export value the highest in a decade
- Record average value of bottled wine exports
- The average value of bulk wine is at its highest level since 2009
- Wines priced above $10 a litre reached a record level of $779 million
- All major red and white varieties recorded value growth
- Northeast Asia continues to be the growth driver, with exports to China (including Hong Kong and Macau) reaching a combined $1 billion for the first time
- There was growth at higher price points in the United States of America
- Exports to the United Kingdom returned to pre-Brexit announcement levels

Commentary

Overview

In the year ended March 2018, Australian wine exports increased by 16 per cent in value to $2.65 billion, the highest value in a decade, and 10 per cent in volume to a near-record level of 844 million litres (or 94 million 9 litre case equivalents). As value growth outpaced volume growth, the average value increased by 5 per cent to $3.14 per litre.

Bottled vs bulk

The value of bottled wine increased by 15 per cent to $2.15 billion, the highest value since the same period in 2009. Volume increased by 10 per cent to 374 million litres, leading to an all-time high average value of $5.74 per litre. The strong demand for Australian premium wine in Northeast Asia continues to drive these pleasing figures.

Exports of wine in bulk containers hit record highs in both volume and value, up 10 per cent in volume to 462 million litres and 19 per cent in value to $486 million. Average value increased by 8 per cent to $1.05 per litre, the highest level since 2009. Supply pressures from historically low Northern Hemisphere harvests are driving the demand for Australian wine to fill the market gaps, increasing both volume and the average value of exported bulk wine. As illustrated in Figure 1, every country in the top 10 of Australia's bulk wine destinations by value experienced increases in average value, especially Germany, the largest importer of wine in the world, increasing by 20 per cent from $0.87 to $1.05 in the last year.

Exporter performance

There were 2243 active exporters during the period, of which 1521 either started exporting or increased their exports. These companies contributed $540 million to the growth in exports. This value was partially offset by companies that either decreased their exports or ceased exporting; there were 1111 of these companies and their exports declined by a combined $180 million.

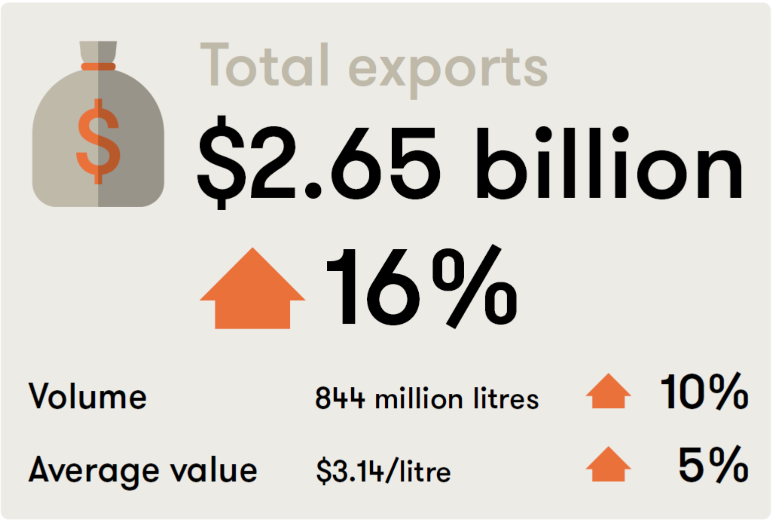
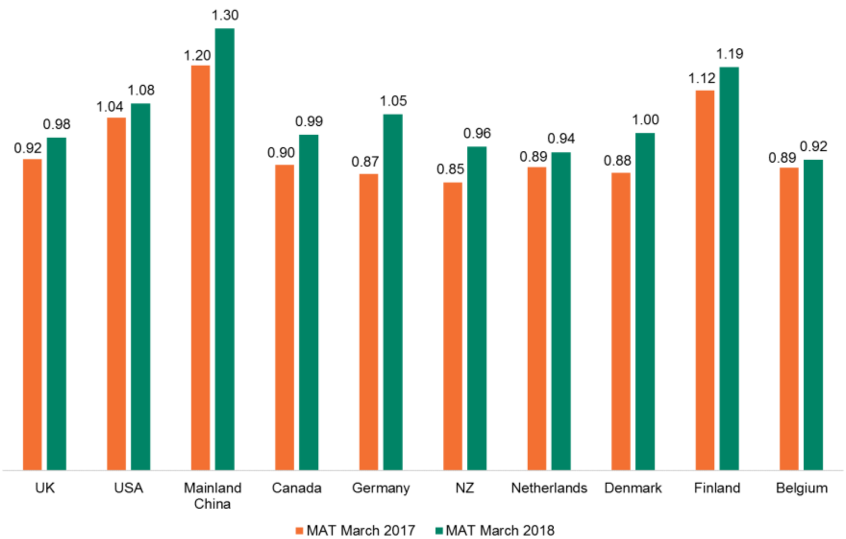


Figure 1: Average value of bulk wine to top 10 bulk wine destinations, 2017 v 2018 ($ per litre FOB)



Commentary (continued)

Price Points

There was healthy growth at nearly all price points, as illustrated in Figure 2. Wines priced $10 a litre and above reached a record level of $779 million, increasing by 30 per cent during the year. At the other end of the spectrum, entry-level wines priced at $2.49 per litre and under grew by 20 per cent. The highest growth rate can be found in wines priced between $20–29.99, up by 68 per cent to $148 million. These figures demonstrate that the diversity of Australian wine across all price segments, from entry-level to fine wine, is meeting the tastes and needs of all consumers.

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

Price segment (A$/litre)	MAT March 2018	Value change	Growth rate
$2.49 and under	$548	$90	20%
$2.50 to $4.99	$829	$33	4%
$5.00 to $7.49	$340	$44	15%
$7.50 to $9.99	$154	$14	10%
$10.00 to $14.99	$198	$20	11%
$15.00 to $19.99	$73	-$16	-18%
$20.00 to $29.99	$148	$60	68%
$30.00 to $49.99	$96	$28	41%
$50.00 to $99.99	$193	$66	52%
$100.00 to $199.99	$19	$5	41%
$200.00 +	$51	$15	42%
Total value	$2,651	$360	16%

Wine styles

Australian red wine continues to grow in popularity, with exports increasing by 20 per cent in value to exceed $2 billion for the first time since 2007. This growth is mainly driven by demand for premium Australian red wine in mainland China, where the share of total red wine exports has increased from 32 per cent to 44 per cent in the last year. Red wine exports also grew strongly to the United Kingdom (UK), up 10 per cent in value to $227 million.

Exports of white wine increased by 4 per cent to $566 million, accounting for 21 per cent of total exports, compared with a 76 per cent share for reds. Driving the overall increase in the value of white shipments were exports to the UK and mainland China, increasing by 8 per cent ($10 million) and 40 per cent ($9 million) respectively.

For red wine, the top five label claims recorded growth:

- Shiraz grew by 16 per cent to $609 million
- no variety label claim (red blend, dry red, etc.) grew by 25 per cent to $406 million
- Cabernet Sauvignon grew by 25 per cent to $357 million
- Shiraz/Cabernet Sauvignon grew by 39 per cent to $191 million, and
- Cabernet Sauvignon/Shiraz grew by 40 per cent to $114 million.

The strong growth rate in Cabernet Sauvignon/Shiraz exports led to the category overtaking Merlot, which has been more popular historically. However, Merlot exports still grew by 7 per cent to $111 million. Other red varieties/blends to record growth off smaller bases included Shiraz/Mourvèdre (up 9 per cent to $32 million), Pinot Noir (up 5 per cent to $31 million) and Shiraz/Viognier (up 11 per cent to $9).

The top five label claims for white wine also recorded growth:

- no variety label claim (dry white, sweet white, etc.) grew by 11 per cent to $234 million
- Chardonnay grew by 1 per cent to $177 million
- Sauvignon Blanc grew by 16 per cent to $43 million
- Pinot Grigio grew by 2 per cent to $31 million, and
- Pinot Gris grew by 7 per cent to $21 million.

Commentary (continued)

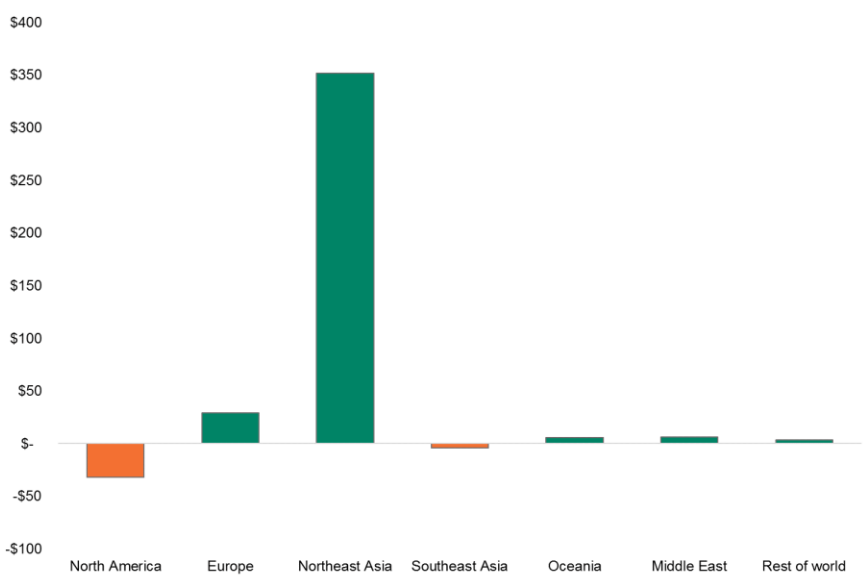
Other white varieties/blends to record growth off smaller bases included Riesling (up 10 per cent to $20 million), Semillon/Chardonnay (up 7 per cent to $6 million) and Semillon/Sauvignon Blanc (up 21 per cent to $6 million).

Red wine exported in bulk containers increased by 24 per cent to $295 million, while white increased by 12 per cent to $190 million. Bulk red wine exports were driven by demand from the UK, China, and Germany, while white wine was driven by demand from Canada, the Netherlands, Germany and the United States of America (USA).

Destinations

Exports to Northeast Asia continued their record-breaking run, growing by 46 per cent to $1.12 billion.

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



Other regions that experienced growth included:

- Europe, by 5 per cent to $596 million
- Oceania, by 7 per cent to $93 million, and
- Middle East, by 30 per cent to $28 million.

Exports to North America continued their recent decline in value, decreasing by 5 per cent to $633 million. One of the factors driving this decrease is the decline of bottle exports to the USA due to changes in business practices for some exporters that are now exporting in bulk containers and bottling in market.

The top five markets by value were:

- China, including Hong Kong and Macau, (39 per cent of export value)
- United States of America (17 per cent)
- United Kingdom (14 per cent)
- Canada (7 per cent), and
- New Zealand (3 per cent).

The top five markets by volume were:

- United Kingdom (29 per cent of export volume)
- China, including Hong Kong and Macau, (21 per cent)
- United States of America (20 per cent)
- Canada (8 per cent), and
- Germany (5 per cent).

Commentary (continued)

China (including Hong Kong and Macau)

Exports to China (including Hong and Macau) increased by 51 per cent to a record $1.04 billion. This is the first time that Australia has shipped $1 billion worth of wine to one country.

David Lucas, Wine Australia's Regional General Manager, China, said, 'The continued improvement in the distribution of Australian wine, increasingly acceptable price positioning, and our renowned quality, all combine to fuel the dynamic demand for wine from Australia. The tariff reforms help greatly in supporting this development, but the intrinsic quality and diversity offered by Australia is attractive to an ever-widening group of imported wine consumers. Continued investment with the support of the Australian Government's significant $50 million export package, bodes well for the future of Australian wine in China.'

Mainland China

The extraordinary growth of wine exports to mainland China continued in the 12 months ended March 2018. The value of exports to China increased by 64 per cent to $932 million. Volume increased by 57 per cent to 171 million litres (19 million 9 litre case equivalents), leading to an average value of $5.44 per litre.

Growth in the March quarter accelerated compared with the December quarter as the second to last Customs Duty reduction through the China–Australia Free Trade Agreement (ChAFTA) came into effect on 1 January 2018. The final cut will take place on 1 January 2019, taking the duty to zero on all wine products from Australia. This will give Australian wine exporters a competitive advantage over key producers such as France, Italy and Spain that face a 14 per cent tariff on bottled wine and 20 per cent tariff on bulk wine.

Mainland China has now overtaken the USA to become Australia's second largest export market by volume. The increase in volume was driven by both commercial and premium wines, with 55 per cent of the volume increase coming from bottled wine and the remainder from wine shipped in bulk containers.

The value of bottled wine increased by 61 per cent to $857 million, while bulk value more than doubled to $74 million. Figure 4 shows that there were very strong rates of growth across all price points, illustrating that wine is starting to become an everyday drink among middle-class and affluent Chinese consumers, not just for gifting or special occasions.

Nevertheless, the premium price points are behind most of the overall value growth to China. Exports at $10 per litre or more increased by 85 per cent to $428 million. This price segment accounted for 46 per cent of total exports to mainland China. As illustrated in Figure 4, the highest absolute value increase was observed in the $50–99.99 price segment, which grew by $73 million. The highest growth rate came from wines priced above $200 per litre, which grew by 172 per cent.

Figure 4: Exports to mainland China by price point

Price segment (A$/litre)	MAT March 2018	Value change	Growth rate
$2.49 and under	$81,451,431	$42,052,932	107%
$2.50 to $4.99	$222,298,944	$60,812,500	38%
$5.00 to $7.49	$138,406,858	$45,205,922	49%
$7.50 to $9.99	$61,224,216	$18,977,414	45%
$10.00 to $14.99	$84,937,353	$26,106,383	44%
$15.00 to $19.99	$32,784,284	$5,065,900	18%
$20.00 to $29.99	$92,473,246	$46,836,472	103%
$30.00 to $49.99	$56,932,734	$24,003,461	73%
$50.00 to $99.99	$126,135,594	$73,148,930	138%
$100.00 to $199.99	$9,048,935	$5,173,714	134%
$200.00 +	$26,008,644	$16,454,622	172%
Total value	$931,702,240	$363,838,250	64%

Australian wine is well-placed in mainland China. Australia is second to France in volume, but number one in the average price of bottled wine among the five biggest exporters to China. Australian wine is celebrated as high quality, healthy and authentic. Chinese wine consumers recognise our distinctive regions and long tradition of winemaking. Research conducted by Wine Intelligence on behalf of Wine Australia shows that the number of Australian wine drinkers in China has doubled since 2013.

Commentary (continued)

Red wine accounts for 95 per cent of the export value to China, increasing by 66 per cent to $886 million. However, the value of white wine exports also increased, by 40 per cent to $32 million. This reflects the increasing acceptance of white wine in what is predominantly a red wine market. This is principally due to an increased number of younger Chinese people drinking wine who are more open to trying new styles. Through more frequent overseas travel, these consumers have been exposed to more wines, resulting in increased knowledge and awareness of wine styles and types.

The top five variety label claims to mainland China all recorded growth:

- Shiraz grew by 46 per cent to $309 million
- Cabernet Sauvignon grew by 84 per cent to $175 million
- no label claim (dry red blends, dry white blends etc.) grew by 61 per cent to $128 million
- Shiraz/Cabernet Sauvignon grew by 111 per cent to $101 million, and
- Cabernet Sauvignon/Shiraz grew by 112 per cent to $74 million.

Chardonnay is the leading white category and exports increased by 39 per cent to $14 million. Riesling is the second biggest white category and exports grew strongly, albeit off a much smaller base, up 43 per cent to $2.5 million.

Hong Kong

Hong Kong is a vital trading hub with important distribution links to mainland China. Some imported wines in Hong Kong are re-exported to other Asian destinations, with 95 per cent of re-exports going to mainland China and Macao. Hence not all Australian wine exported to Hong Kong is consumed in the country.

Hong Kong is Australia's fifth largest export market by value. In the 12 months ended March 2018, the value of exports to Hong Kong decreased by 10 per cent to $107 million, while volume decreased by 6 per cent to 8 million litres. This decrease in exports is largely due to the reduction of the customs duty in mainland China under ChAFTA, which has resulted in some companies now exporting directly to mainland China instead of going through Hong Kong.

Hong Kong remains a high-value market for Australian wine. With an average value of $13.33 per litre, Hong Kong has the highest average value of Australia's top 30 export destinations by value. It receives 10 per cent of exports priced $10 a litre and above FOB, second only to mainland China, making it an important market for Australia's premium wines.

Australian wine will take centre stage with Australia as the Country of Honour at Vinexpo Hong Kong 2018 in May. Vinexpo Hong Kong is the key trade-only wine and spirits exhibition in the Asia-Pacific region. The invite-only event attracts top decision-making importers, buyers and sommeliers, and provides a forum for education and trade networking. This event, funded with the support of the Australian Government's $50 million Export and Regional Wine Support Package will provide a platform for Australian wine to expand its already strong position in Hong Kong and the wider Asia region.

North America

United States of America

In the past 12 months, exports to the USA decreased by 7 per cent in value to $439 million and 5 per cent in volume to 166 million litres. Average value per litre declined by 1 per cent to $2.65.

Commentary (continued)

The main driver of the decline in Australian exports to the USA is at the commercial end of the market, particularly in exports priced between $2.50 and $4.99 a litre. As shown by Figure 5, this segment declined by 10 per cent ($30 million) to $269 million. The impact on total exports is significant as just under two-thirds of Australia's exports to the USA are in this price segment. Furthermore, this declining trend is mirrored in off-trade retail data. According to IRI Worldwide, in 2017, sales of Australian wines priced US$4–7.99 per bottle declined by 6 per cent while the total market in this price segment declined by 4 per cent. This shift away from lower-priced wines is a global trend, seen in most developed wine markets across the world.

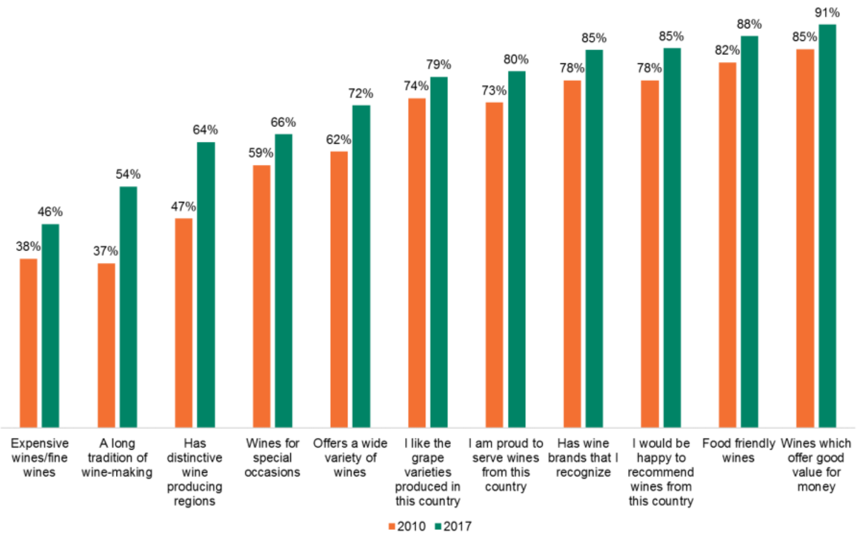
While the commercial end is in decline, there has been growth in exports of higher priced premium wines reflecting the premiumisation trend in the USA. Australian exports to the USA at $10 per litre and above grew by 2 per cent to $44 million. The biggest contributor of absolute value in this part of the market was the $30–49.99 segment, which increased by $1 million (or 25 per cent) to $5 million. As in mainland China, the highest growth rate was recorded in the $200 and over segment, which increased by 49 per cent.

Figure 5: Exports to the United States of America by price point

Price segment (A$/litre)	MAT March 2018	Value change	Growth rate
$2.49 and under	$89,220,614	$1,392,915	2%
$2.50 to $4.99	$269,416,266	($30,296,294)	-10%
$5.00 to $7.49	$22,258,798	($1,826,380)	-8%
$7.50 to $9.99	$14,401,046	($1,187,179)	-8%
$10.00 to $14.99	$18,393,810	($1,328,052)	-7%
$15.00 to $19.99	$9,770,387	($511,924)	-5%
$20.00 to $29.99	$6,772,688	$650,206	11%
$30.00 to $49.99	$4,976,452	$1,002,859	25%
$50.00 to $99.99	$2,458,327	$571,168	30%
$100.00 to $199.99	$805,156	$186,353	30%
$200.00 +	$791,038	$261,447	49%
Total value	$439,264,581	($31,084,881)	-7%

There is upside in the USA for Australian wines. While Australia holds a 28 per cent share of imported wine sales below US$10 per bottle, Australia holds only 4 per cent of imported wine sales at US$10 per bottle and above (International Wine and Spirit Record, 2016). This premium wine market in the USA is growing. By 2020, it is estimated that the USA market will need an extra 27 million cases of premium wine to meet demand. With production constraints in California and Chile, and significant reductions in production in France, Italy and Spain in 2017 for the second year and vintages fluctuating wildly, Australia is well-placed to increase its supply of premium wine to the USA market. Furthermore, Australian wines resonate with the US wine consumer and perceptions continue to improve. According to Wine Intelligence research, those who think Australia makes expensive/fine wines grew 21 per cent since 2010 (see Figure 6).

Figure 6: Share of regular wine drinkers in the USA agreeing with the statement in relation to Australian wine, 2010 v 2017



Source: Wine Intelligence

Commentary (continued)

Canada

Export value to Canada during the period was stable at $193 million. However, volume increased by 6 per cent to 66 million litres, causing average value to decline by 6 per cent to $2.90 per litre. The main factor behind these movements was the increase in bulk and alternative packaging exports outweighing the decline in bottled exports. Exports in bulk containers increased by 26 per cent to $38 million and alternative packaging increased by 825 per cent from $161,000 to $1.5 million, while bottled exports decreased by 6 per cent to $152 million.

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

- Ontario (38 per cent share)
- British Columbia (25 per cent)
- Quebec (21 per cent)
- Alberta (9 per cent), and
- Nova Scotia (5 per cent).

Exports to British Columbia increased by 5 per cent in value, while Quebec was stable, and Ontario, Alberta and Nova Scotia declined.

Aaron Ridgway, Wine Australia's Regional General Manager, North America, said, 'It is very positive to see stability return to the Canada market, and the slight decline in the USA is manageable as long as the premiumisation trend continues. With consumer sentiment strong and exchange rates favourable, we need to continue to grow the breadth of Australia's premium exported offering, giving consumers greater choice and reinforcing to the trade that Australia is a major opportunity.'

United Kingdom

While there is still a considerable amount of anxiety in the UK surrounding Brexit, there are positive signs that exports to Australia's largest export destination by volume are starting to turn around after more than two years of decline. Exports in the 12 months to March increased by 9 per cent in value to $373 million and 8 per cent in volume to 241 million litres. Average value increased by 1 per cent to $1.55 per litre.

Bottled exports increased by 5 per cent to $183 million and bulk exports by 14 per cent to $190 million.

Examining exports by price point (see Figure 7), much of the growth in exports to the UK has come at below $5 a litre. There are shifts in business practices that are influencing these figures. First, with the easing of currency volatility due to Brexit, some brands are returning to bottling in Australia, resulting in a shift of value, from bulk at under $2.50 per litre to bottled exports at $2.50–4.99 per litre. Secondly, the increase in value at $2.49 and under is influenced by some businesses shifting bottling to the UK from other countries in Europe. It is also understood that the big supermarket retailers have started to accept some price increases at the commercial end of the market.

Figure 7: Exports to the United Kingdom by price point

Price segment (A$/litre)	MAT March 2018	Value change	Growth rate
$2.49 and under	$205,176,048	$24,118,225	13%
$2.50 to $4.99	$106,200,371	$14,030,083	15%
$5.00 to $7.49	$23,834,638	($2,908,157)	-11%
$7.50 to $9.99	$12,558,589	($251,707)	-2%
$10.00 to $14.99	$12,394,827	($2,750,601)	-18%
$15.00 to $19.99	$4,250,665	($1,010,337)	-19%
$20.00 to $29.99	$3,095,019	($354,105)	-10%
$30.00 to $49.99	$2,481,891	($370,371)	-13%
$50.00 to $99.99	$1,263,631	($111,145)	-8%
$100.00 to $199.99	$768,562	$138,543	22%
$200.00 +	$996,914	$342,728	52%
Total value	$373,021,154	$30,873,157	9%

Commentary (continued)

It is evident that the market for premium wine in the UK remains a challenge for Australian wine producers. Exports priced $10 per litre and above declined by 14 per cent in the last 12 months to $25 million. Economic instability, retailer consolidation and tax hikes are affecting demand for premium Australian wine in the UK. However, Australia's long-standing position as the number one category in the off-trade and Australia's formidable reputation for value-for-money wines can be leveraged to encourage premium wine consumption. This is evident in off-trade retail figures for the 12 months ended November 2017. IRI Worldwide shows growth rates of between 30 and 50 per cent for Australian wine sales in price points between £8 and £20 per bottle, albeit off small bases. Australia's market share is less than 10 per cent of these price points indicating there is some upside for Australian wine producers.

Australia's big two varieties are showing very positive signs in the UK. Bottled Shiraz exports climbed 8 per cent to $44 million, while bottled Chardonnay increased by 20 per cent to $35 million. The growth in Chardonnay exports reflects a move away from the 'anything but Chardonnay' trend that has been evident in recent times in the UK, particularly in the premium on-trade channel where high-value Australian Chardonnay is finding favour with consumers. Furthermore, more alternative grape varieties from Australia are also attracting a new crowd in the UK. For example, exports of Viognier/Roussanne more than quadrupled in the last 12 months to $1.2 million. The growing preference for elegance has seen the continued rise of Pinot Noir, with exports growing by 21 per cent to $4 million.

Laura Jewell MW, Wine Australia's Regional General Manager, EMEA said 'The UK economy is in robust shape so far this year, and the draft agreement reached on 19 March on the UK's withdrawal from the EU should encourage some companies to avoid executing contingency plans that would have seen jobs shift to the continent, thus safeguarding some investment in the UK. However, in recent weeks, we have seen the UK's largest drinks supplier broken up and sold off, with the associated financial issues that come with such disruption. In spite of this, it is good to see the UK in positive growth again, reflected in the off-trade figures from Nielsen at December 17 showing growth of 2 per cent in value for Australian wine.'

Other markets

Other markets with encouraging growth figures include:

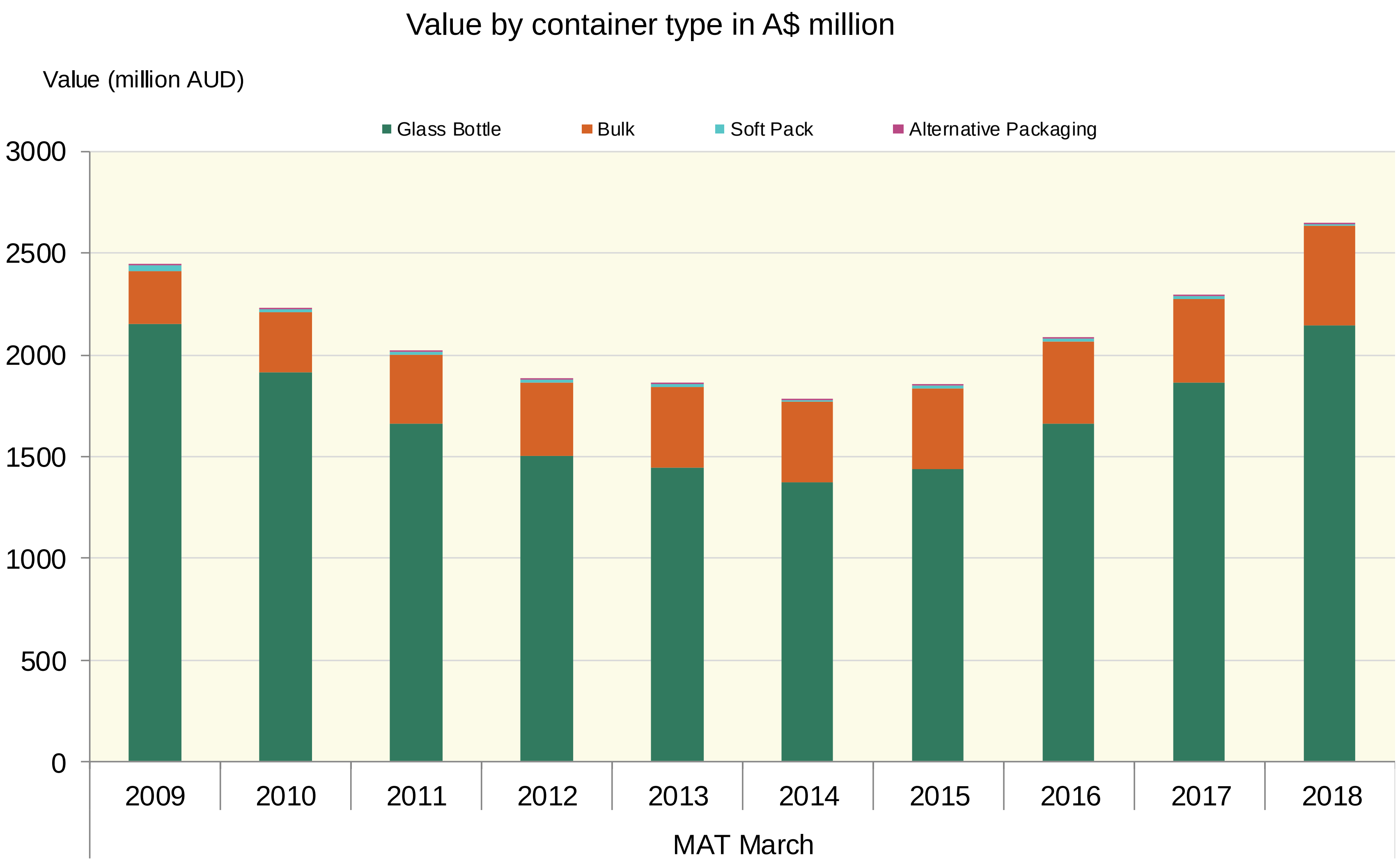
Europe, Middle East & Africa

- Germany by 23 per cent to $59 million
- United Arab Emirates by 33 per cent to $26 million
- Finland by 8 per cent to $17 million, and
- Belgium by 12 per cent to $16 million.

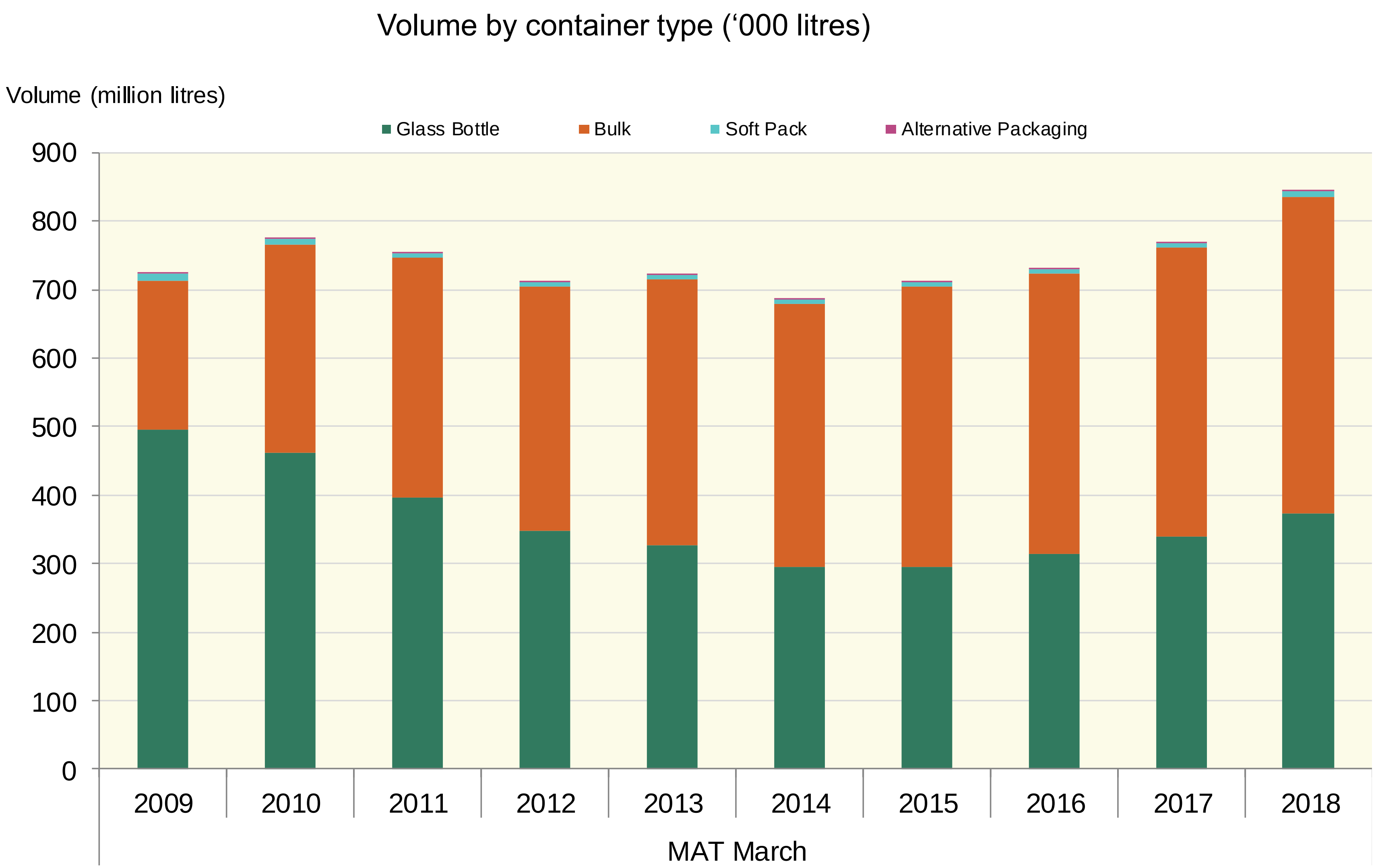
Asia-Pacific

- New Zealand by 8 per cent to $82 million
- Singapore by 12 per cent to $78 million
- Japan by 1 per cent to $47 million
- South Korea by 19 per cent to $16 million, and
- Philippines by 17 per cent to $9 million.

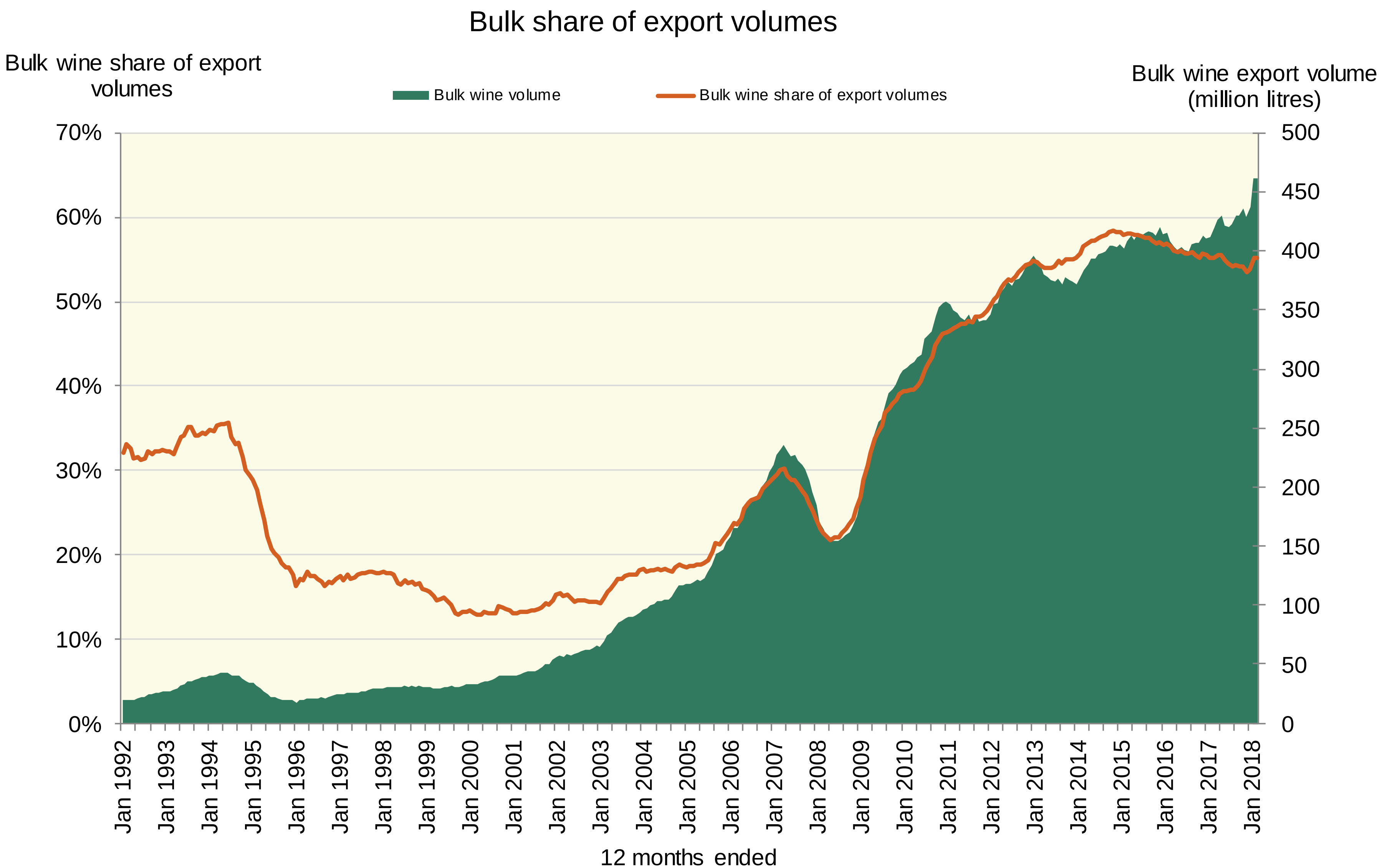
Historic overview of exports



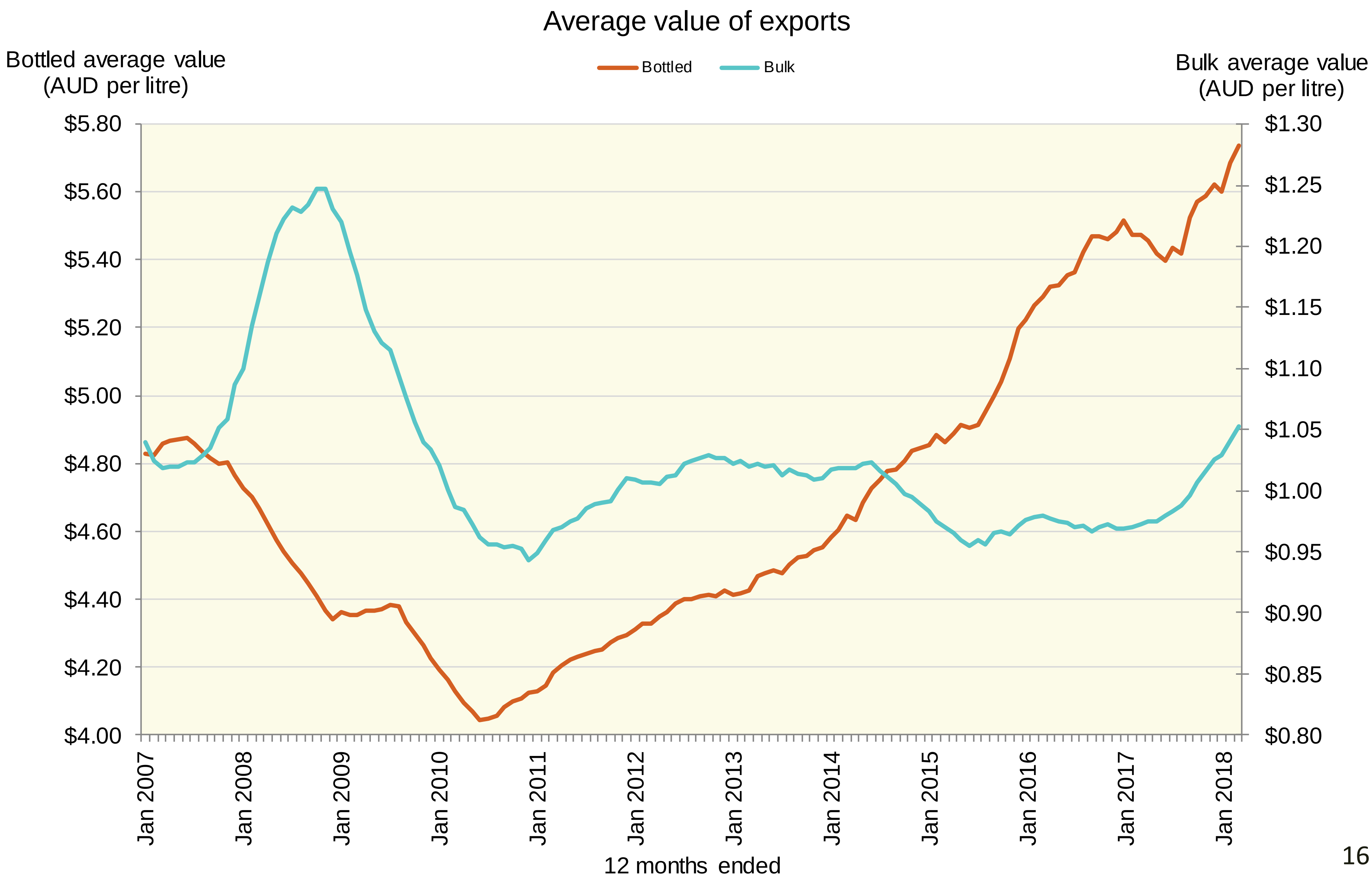
Historic overview of exports



Historic overview of exports

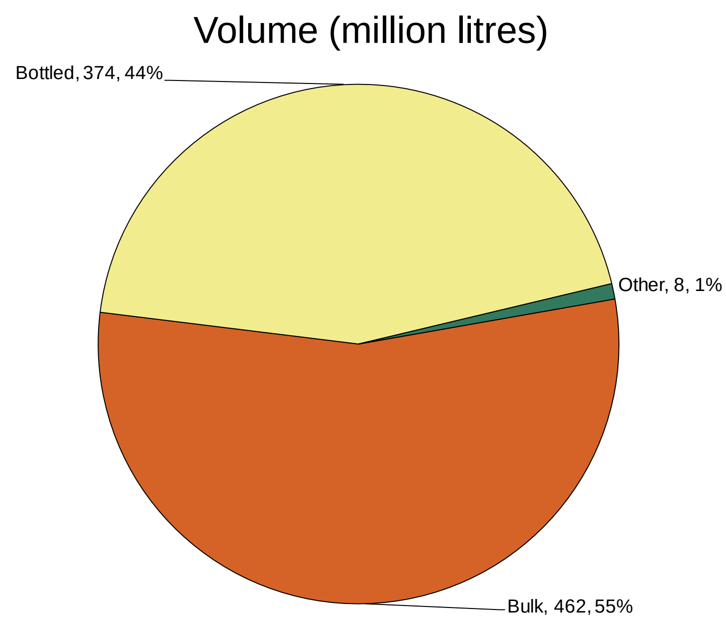


Historic overview of exports

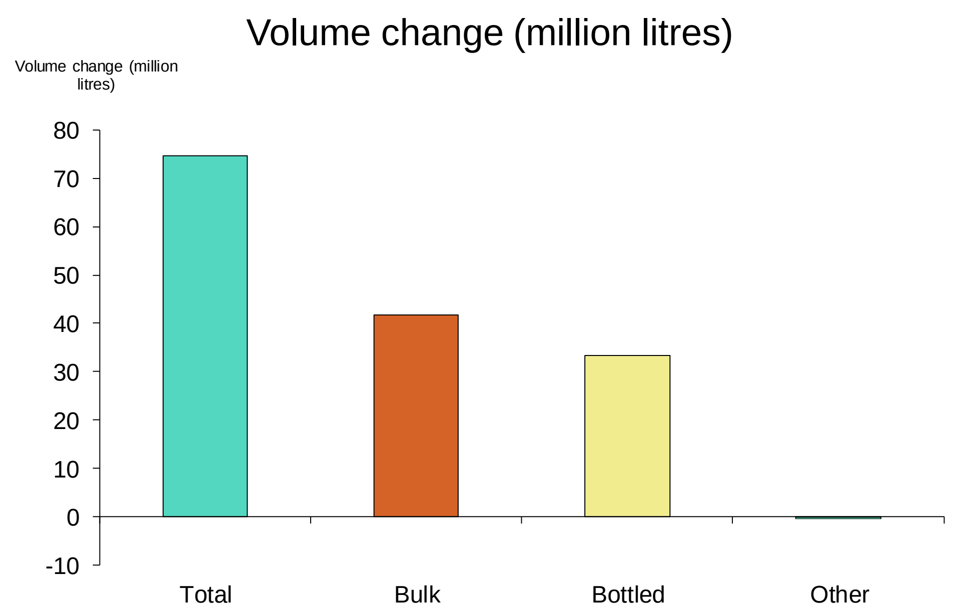


Exports by container type

MAT March 2018



		Volume (ML)	Value (A$M FOB)	Average Value (A$/L FOB)
Bottled	2018	374	2,145	5.74
	Change	10%	15%	5%
	Share	44%	81%	
Bulk	2018	462	486	1.05
	Change	10%	19%	8%
	Share	55%	18%	
Other	2018	8	19	2.39
	Change	-5%	3%	8%
	Share	1%	1%	
Total	2018	844	2,651	3.14
	Change	10%	16%	5%
	Share	100%	100%	



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

Wine exports
by country, container and colour

Value for MAT March 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 March 2018 (A$ '000s)	Change %	MAT March 2018 (A$ '000s)	Change %	MAT March 2018 (A$ '000s)	Change %	MAT March 2018 (A$ '000s)	Change %	MAT March 2018 (A$ '000s)	Change %	MAT March 2018 (A$ '000s)	Change %	MAT March 2018 (A$ '000s)	Change %	MAT March 2018 (A$ '000s)	Change %	MAT March 2018 (A$ '000s)	Change %
China, Pr	814,575	63%	70,572	++	693	-42%	28,560	40%	3,609	37%	56	-37%	7,719	34%	5,918	21%	931,702	64%
United States Of America	221,498	-9%	27,891	-12%	488	-29%	122,528	-10%	50,137	7%	76	++	4,067	-8%	12,580	56%	439,265	-7%
United Kingdom	108,266	3%	118,932	19%	0	-100%	69,649	9%	71,142	6%	9	-88%	3,970	-8%	1,054	-13%	373,021	9%
Canada	104,378	-6%	17,500	13%	694	23%	41,688	-8%	20,386	40%	1,821	++	4,042	12%	2,066	5%	192,576	0%
Hong Kong	96,259	-11%	0	-100%	1,629	31%	6,464	-8%	0	na	316	11%	1,342	18%	720	-27%	106,730	-10%
New Zealand	48,166	3%	7,790	46%	538	-32%	9,150	16%	7,138	-2%	573	19%	7,094	53%	1,862	-40%	82,311	8%
Singapore	63,367	17%	0	na	408	25%	7,114	5%	0	na	123	5%	6,189	-15%	726	-11%	77,926	12%
Germany, Federal Republic	17,353	-11%	20,866	52%	0	na	5,073	83%	15,120	32%	0	na	82	-47%	60	8%	58,554	23%
Japan	19,546	-2%	3,508	80%	2,418	13%	9,914	-11%	1,917	42%	1,035	16%	4,880	-14%	4,177	2%	47,395	1%
Malaysia	41,375	-16%	0	na	46	-66%	2,742	9%	0	na	11	-15%	157	-17%	249	-10%	44,580	-15%
Netherlands	11,776	-20%	3,822	8%	0	na	11,275	-3%	6,403	99%	0	na	806	-8%	184	-89%	34,266	-4%
United Arab Emirates	17,366	48%	31	-97%	727	36%	6,082	46%	0	na	441	29%	959	-18%	551	11%	26,156	33%
Denmark	9,220	-8%	5,422	-4%	0	na	3,621	-1%	2,362	-5%	0	na	670	-11%	706	92%	22,001	-4%
Sweden	11,852	2%	2,365	-18%	0	na	5,294	-10%	1,101	-7%	0	na	608	-9%	17	-48%	21,237	-5%
Thailand	11,551	-13%	771	32%	382	-73%	3,028	-10%	342	++	187	-51%	1,077	24%	48	-73%	17,386	-14%
Finland	6,346	-5%	4,032	62%	0	na	2,937	32%	2,781	-3%	0	na	701	-40%	285	-36%	17,081	8%
Belgium	4,318	6%	2,547	-27%	0	na	4,412	26%	4,059	39%	0	na	566	73%	228	++	16,130	12%
Korea, R	11,484	22%	0	na	1,018	54%	2,649	9%	0	na	46	++	281	-42%	237	42%	15,716	19%
Taiwan Province	12,126	-16%	0	-100%	272	7%	1,073	11%	44	na	83	-36%	128	-67%	307	-4%	14,033	-15%
Ireland	6,590	-29%	31	na	0	na	5,883	-14%	0	-100%	0	na	189	42%	12	-92%	12,706	-23%
Rest of the world	58,463	3%	8,916	-47%	1,562	-9%	20,778	11%	3,933	-40%	1,233	0%	2,684	-18%	2,322	-3%	99,891	-7%
World	1,695,876	19%	294,997	24%	10,874	-7%	369,913	1%	190,474	12%	6,008	25%	48,212	2%	34,307	8%	2,650,662	16%

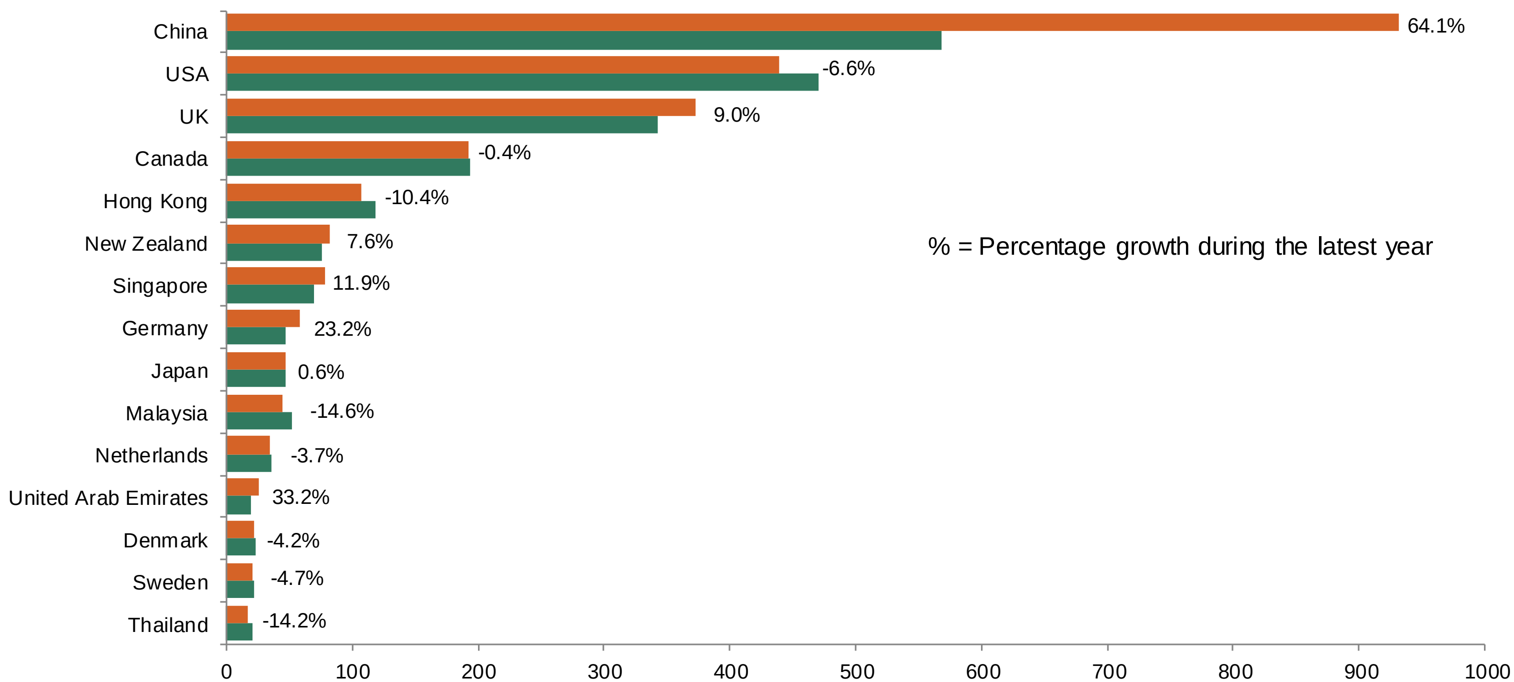
Wine exports
by country, container and colour

Volume for MAT March 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 March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %
United Kingdom	25,222	12%	113,877	12%	0	-100%	21,440	19%	79,677	-1%	1	-96%	881	-18%	251	2%	241,349	8%
China, Pr	107,206	44%	54,171	++	324	-35%	4,645	43%	2,700	-14%	19	-57%	1,342	28%	912	12%	171,319	57%
United States Of America	53,764	-8%	18,169	-24%	134	-35%	35,383	-7%	53,841	5%	14	++	757	-2%	3,491	62%	165,552	-5%
Canada	17,351	-3%	17,293	2%	195	28%	9,185	-8%	20,962	28%	381	49%	688	6%	431	20%	66,487	6%
Germany, Federal Republic	4,697	-10%	16,865	15%	0	na	1,686	17%	17,366	23%	0	na	7	-44%	17	++	40,639	15%
New Zealand	9,215	4%	6,188	17%	268	-37%	2,899	31%	9,415	-2%	202	-25%	1,391	38%	407	-43%	29,985	5%
Netherlands	3,683	-9%	3,499	-6%	0	na	3,724	6%	7,382	91%	0	na	236	14%	73	-86%	18,596	18%
Japan	3,679	1%	2,851	++	1,484	14%	2,009	-10%	2,056	54%	600	9%	1,099	0%	893	3%	14,671	19%
Denmark	1,509	-9%	5,045	-17%	0	na	884	1%	2,769	-14%	0	na	133	-15%	177	++	10,518	-12%
Belgium	680	-16%	2,405	-33%	0	na	928	10%	4,796	32%	0	na	124	77%	46	++	8,978	1%
Hong Kong	6,088	-9%	0	-100%	645	30%	936	-5%	0	na	140	9%	132	4%	66	-29%	8,006	-6%
Finland	1,049	-3%	2,875	53%	0	na	590	26%	2,844	-2%	0	na	139	-37%	80	-22%	7,577	14%
Sweden	2,344	-3%	1,477	-16%	0	na	1,431	-9%	612	-13%	0	na	142	0%	1	-87%	6,006	-9%
Singapore	3,999	7%	0	na	228	37%	920	5%	0	na	51	-4%	634	-5%	77	1%	5,909	6%
France	183	10%	2,816	34%	0	na	89	55%	1,624	-26%	0	na	0	-95%	0	na	4,713	4%
Malaysia	3,514	-6%	0	na	27	-67%	509	18%	0	na	6	-18%	27	2%	37	-21%	4,120	-5%
Italy	93	-3%	2,473	-77%	0	na	46	2%	1,346	-60%	0	na	0	-100%	0	na	3,959	-72%
Thailand	1,728	-9%	611	28%	216	-72%	719	-7%	336	++	117	-48%	159	32%	10	-74%	3,897	-12%
Ireland	1,828	-21%	26	na	0	na	1,932	-5%	0	-100%	0	na	50	31%	1	-98%	3,837	-14%
United Arab Emirates	1,707	36%	26	-86%	446	36%	997	29%	0	na	308	35%	151	-36%	158	10%	3,793	20%
Rest of the world	12,769	7%	1,991	-12%	1,239	0%	5,005	11%	1,200	9%	624	-7%	485	-30%	635	6%	23,948	4%
World	262,308	13%	252,658	14%	5,205	-8%	95,957	3%	208,928	6%	2,463	0%	8,578	3%	7,763	12%	843,859	10%

Exports
by top 15 destinations

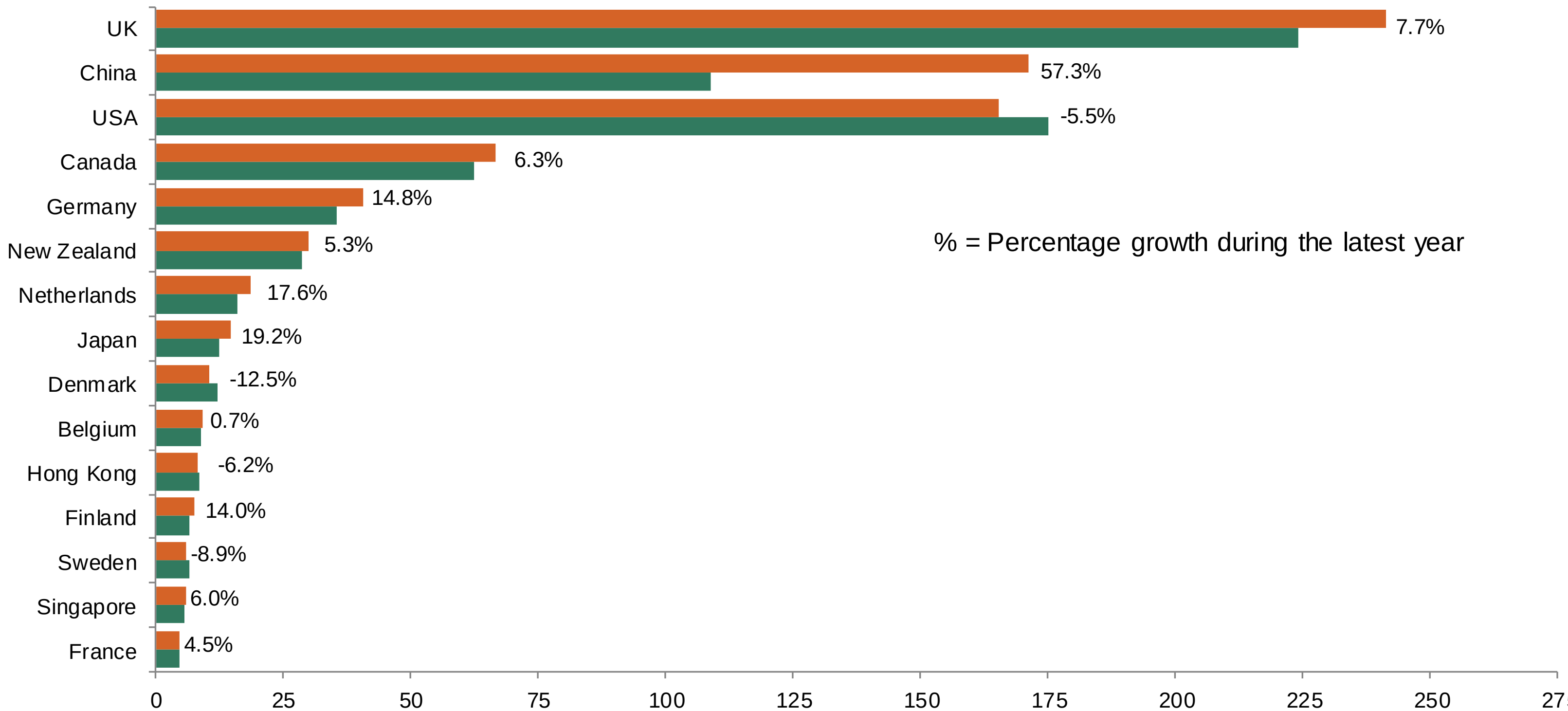
Value (million A$) for MAT March 2018



	Thailand	Sweden	Denmark	United Arab Emirates	Netherlands	Malaysia	Japan	Germany	Singapore	New Zealand	Hong Kong	Canada	UK	USA	China
2018	17.4	21.2	22.0	26.2	34.3	44.6	47.4	58.6	77.9	82.3	106.7	192.6	373.0	439.3	931.7
2017	20.3	22.3	23.0	19.6	35.6	52.2	47.1	47.5	69.6	76.5	119.1	193.4	342.1	470.3	567.9

Exports
by top 15 destinations

Volume (million litres) for MAT March 2018

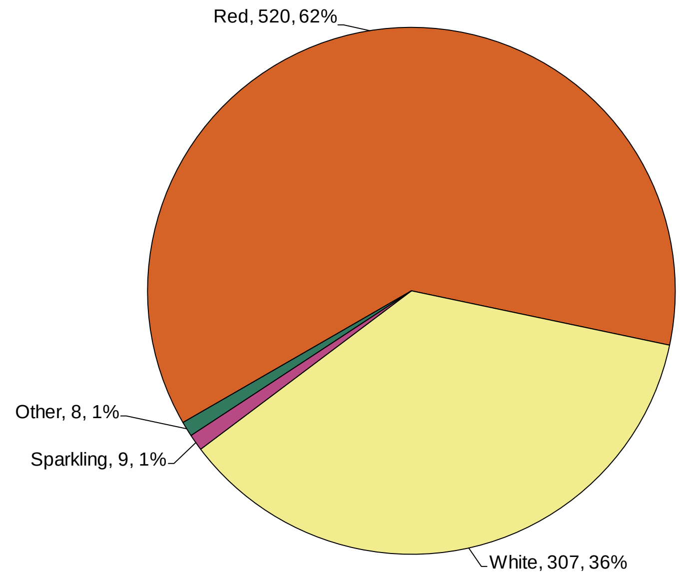


	France	Singapore	Sweden	Finland	Hong Kong	Belgium	Denmark	Japan	Netherlands	New Zealand	Germany	Canada	USA	China	UK
2018	4.7	5.9	6.0	7.6	8.0	9.0	10.5	14.7	18.6	30.0	40.6	66.5	165.6	171.3	241.3
2017	4.5	5.6	6.6	6.6	8.5	8.9	12.0	12.3	15.8	28.5	35.4	62.5	175.1	108.9	224.2

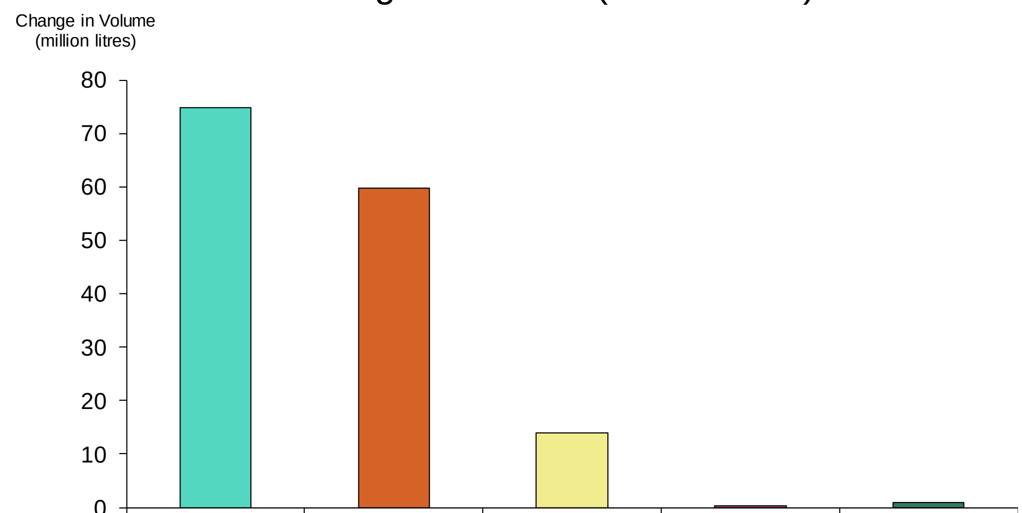
Exports by colour/ wine style

MAT March 2018

Volume (million litres)



Change in volume (million litres)



	Total exports	Red	White	Sparkling	Other
% change	10%	13.0%	4.8%	2.5%	12%
Vol change	74.8	59.7	14.0	0.2	0.8

Bottled wine exports report

Bottled exports by price point and destination

Value (‘000 A$) for MAT March 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 March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %
China	10,919	11%	219,416	39%	136,882	51%	61,208	45%	117,699	36%	149,406	90%	161,193	143%	856,723	61%
USA	15,467	20%	265,883	-10%	21,845	-9%	13,509	-12%	28,164	-6%	11,749	16%	4,055	34%	360,673	-8%
UK	22,750	23%	99,461	14%	23,147	-13%	12,134	-5%	16,636	-18%	5,577	-11%	3,029	14%	182,734	5%
Canada	2,980	67%	45,694	-9%	62,022	0%	18,244	-19%	19,616	-10%	2,723	17%	773	-58%	152,051	-6%
New Zealand	2,470	271%	30,914	8%	17,261	-7%	6,815	6%	6,217	-6%	1,373	2%	1,146	224%	66,196	6%
Netherlands	7,271	307%	12,694	-42%	2,177	-41%	635	17%	863	3%	281	41%	120	290%	24,040	-16%
Japan	806	73%	18,728	-7%	6,042	7%	3,590	-25%	4,674	-17%	2,201	22%	516	34%	36,556	-6%
Hong Kong	43	-59%	9,026	-13%	9,110	-4%	6,355	9%	19,004	-9%	22,234	6%	39,011	-22%	104,783	-11%
Germany	6,129	17%	8,444	-11%	2,425	21%	1,830	0%	2,638	9%	744	-21%	358	-26%	22,568	1%
Singapore	198	-21%	6,434	6%	5,459	29%	4,369	15%	18,351	-22%	17,184	53%	25,392	27%	77,387	12%
Malaysia	212	63%	5,094	17%	7,942	5%	2,115	-11%	4,070	-74%	13,317	94%	11,774	-21%	44,523	-14%
Sweden	1,269	25%	8,975	-9%	3,185	-1%	2,449	0%	1,368	7%	434	33%	91	14%	17,771	-3%
Ireland	1,961	-10%	8,486	-17%	996	-61%	720	-9%	293	-28%	161	0%	57	223%	12,675	-23%
United Arab Emirat	39	-26%	5,219	-7%	4,970	203%	2,052	31%	3,640	21%	3,108	23%	5,779	95%	24,807	43%
Denmark	1,232	292%	3,899	-19%	2,622	-28%	2,635	5%	2,360	5%	1,138	16%	331	-1%	14,217	-4%
Thailand	215	-46%	6,346	5%	2,006	4%	1,507	-24%	1,656	-59%	1,746	48%	2,228	2%	15,704	-12%
Korea, R	4	-99%	3,929	86%	3,992	6%	1,159	3%	3,117	-2%	1,830	31%	611	30%	14,642	17%
Philippines	110	159%	5,520	14%	1,446	29%	356	9%	878	27%	306	13%	315	-15%	8,930	17%
Finland	497	730%	3,140	-25%	2,241	-2%	2,106	-4%	2,229	64%	50	-87%	6	-81%	10,268	-2%
Taiwan Province	18	-66%	4,910	7%	1,196	-7%	753	-11%	1,975	-18%	2,509	-8%	2,274	-46%	13,633	-16%
Other	2,110	39%	34,759	5%	13,445	6%	7,742	4%	16,021	10%	6,257	6%	4,285	-24%	84,618	5%
Total	76,698	33%	806,968	4%	330,413	15%	152,284	9%	271,468	2%	244,327	56%	263,343	49%	2,145,500	15%

Bottled exports by price point and destination

Volume ('000 litres) for MAT March 2018

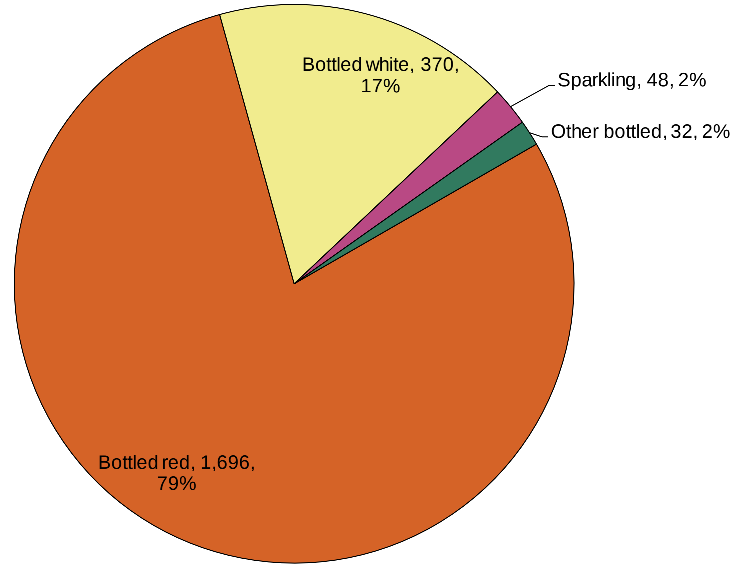
	$2.49 and under		$2.50 to $4.99		$5.00 to $7.49		$7.50 to $9.99		$10.00 to $19.99		$20.00 to $49.99		$50.00 and above		Total	
	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %
China	5,010	9%	61,712	39%	23,589	55%	7,044	43%	9,091	39%	5,606	95%	2,029	134%	114,080	43%
USA	6,546	21%	78,863	-8%	3,818	-8%	1,533	-13%	2,151	-6%	433	15%	50	46%	93,395	-6%
UK	10,042	24%	30,789	19%	3,881	-14%	1,406	-5%	1,315	-19%	195	-12%	27	5%	47,655	14%
Canada	1,253	69%	12,115	-8%	10,426	1%	2,103	-20%	1,634	-9%	96	17%	10	-52%	27,636	-4%
New Zealand	1,064	260%	8,610	7%	2,799	-9%	786	9%	493	-4%	49	4%	15	270%	13,816	8%
Netherlands	3,958	432%	3,223	-52%	381	-39%	74	18%	69	4%	9	42%	1	158%	7,716	-6%
Japan	362	71%	5,161	-4%	999	5%	418	-25%	357	-16%	81	23%	6	11%	7,384	-3%
Hong Kong	25	-54%	2,319	-13%	1,486	-7%	731	10%	1,515	-7%	800	8%	346	-37%	7,221	-8%
Germany	3,206	-9%	2,327	-3%	427	33%	211	0%	210	12%	25	-19%	2	-37%	6,407	-4%
Singapore	91	-25%	1,631	3%	870	27%	505	13%	1,502	-17%	694	66%	335	14%	5,628	5%
Malaysia	93	59%	1,354	13%	1,350	5%	248	-10%	321	-67%	585	126%	135	-20%	4,087	-3%
Sweden	525	24%	2,484	-11%	514	-3%	277	-1%	103	-4%	14	23%	1	25%	3,918	-5%
Ireland	1,113	20%	2,423	-17%	164	-61%	79	-11%	25	-28%	7	16%	1	126%	3,811	-13%
United Arab Emirat	18	-24%	1,405	-9%	817	214%	244	29%	293	34%	118	41%	63	92%	2,958	26%
Denmark	640	381%	1,111	-28%	428	-29%	304	4%	176	4%	40	21%	4	3%	2,703	-2%
Thailand	112	-35%	1,790	4%	318	4%	178	-23%	121	-62%	70	55%	29	-19%	2,617	-7%
Korea, R	2	-99%	1,022	87%	709	4%	137	3%	227	-10%	63	37%	6	51%	2,165	17%
Philippines	51	162%	1,467	10%	249	31%	41	8%	70	31%	12	27%	3	-33%	1,893	15%
Finland	245	919%	809	-27%	359	-1%	249	-2%	194	75%	2	-88%	0	-97%	1,857	-1%
Taiwan Province	8	-67%	1,224	8%	202	-11%	89	-10%	148	-16%	93	-6%	23	-48%	1,787	-1%
Other	985	45%	9,496	2%	2,259	5%	894	4%	1,267	17%	229	12%	52	-29%	15,181	5%
Total	35,347	34%	231,337	5%	56,044	15%	17,553	8%	21,280	4%	9,221	63%	3,135	44%	373,917	10%

Bottled exports by colour/ wine style

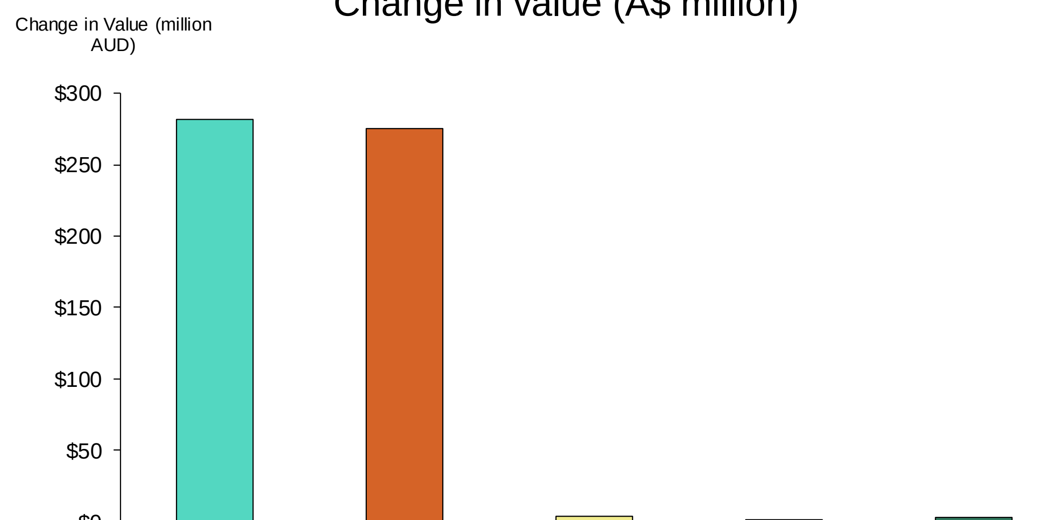
Value

MAT March 2018

Value (A$ million)



Change in value (A$ million)

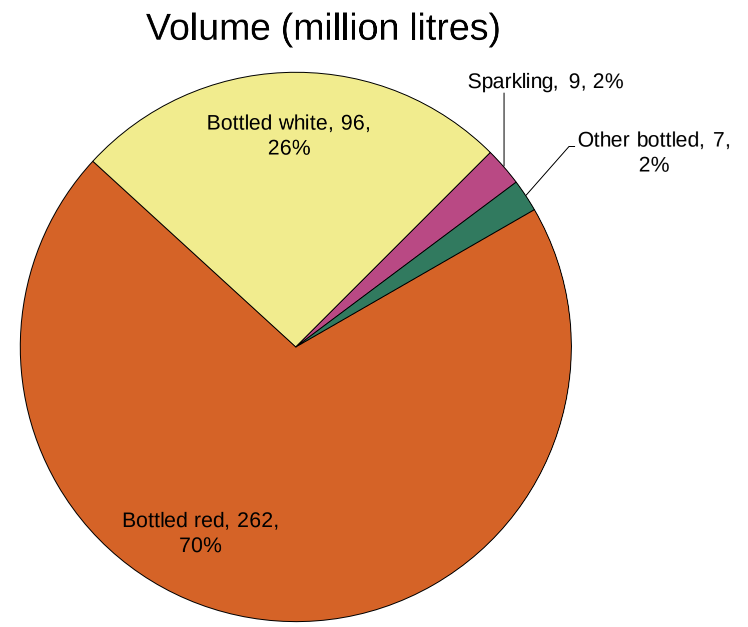


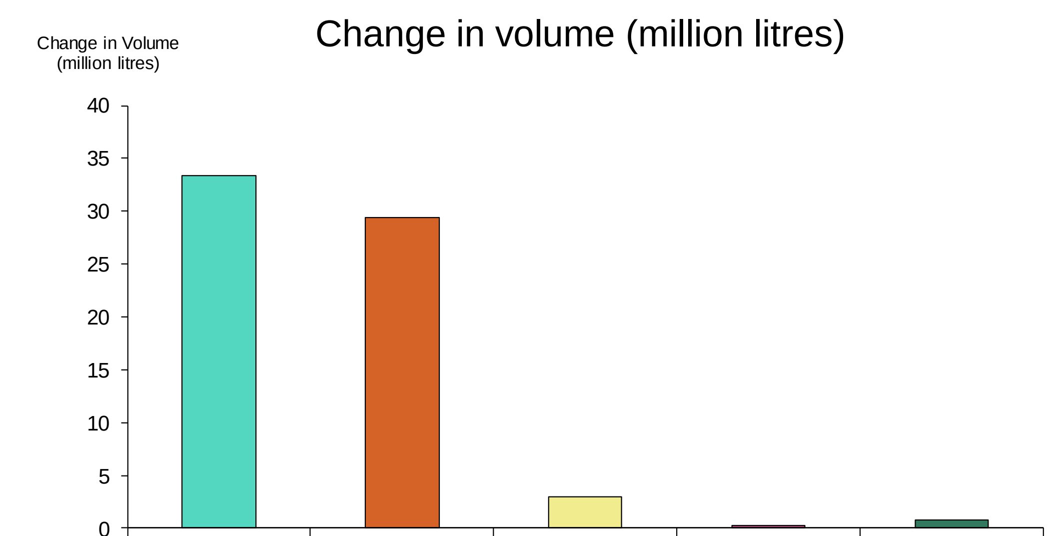
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	15.1%	19.4%	0.9%	1.7%	9.6%
Vol change	282.1	275.1	3.4	0.8	2.8

Bottled exports by colour/ wine style

Volume

MAT March 2018





	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	9.8%	12.6%	3.2%	2.7%	13.0%
Vol change	33.4	29.4	2.9	0.2	0.8

Bottled exports by colour/ wine style

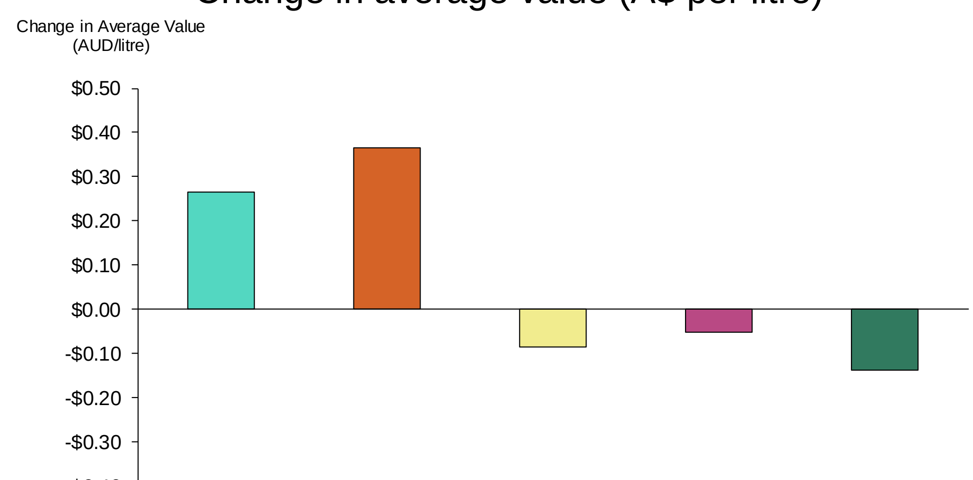
Average value

MAT March 2018

Average value (A$ per litre)

	Bottled red	Bottled white	Sparkling	Other bottled
2018	$6.47	$3.85	$5.63	$4.45

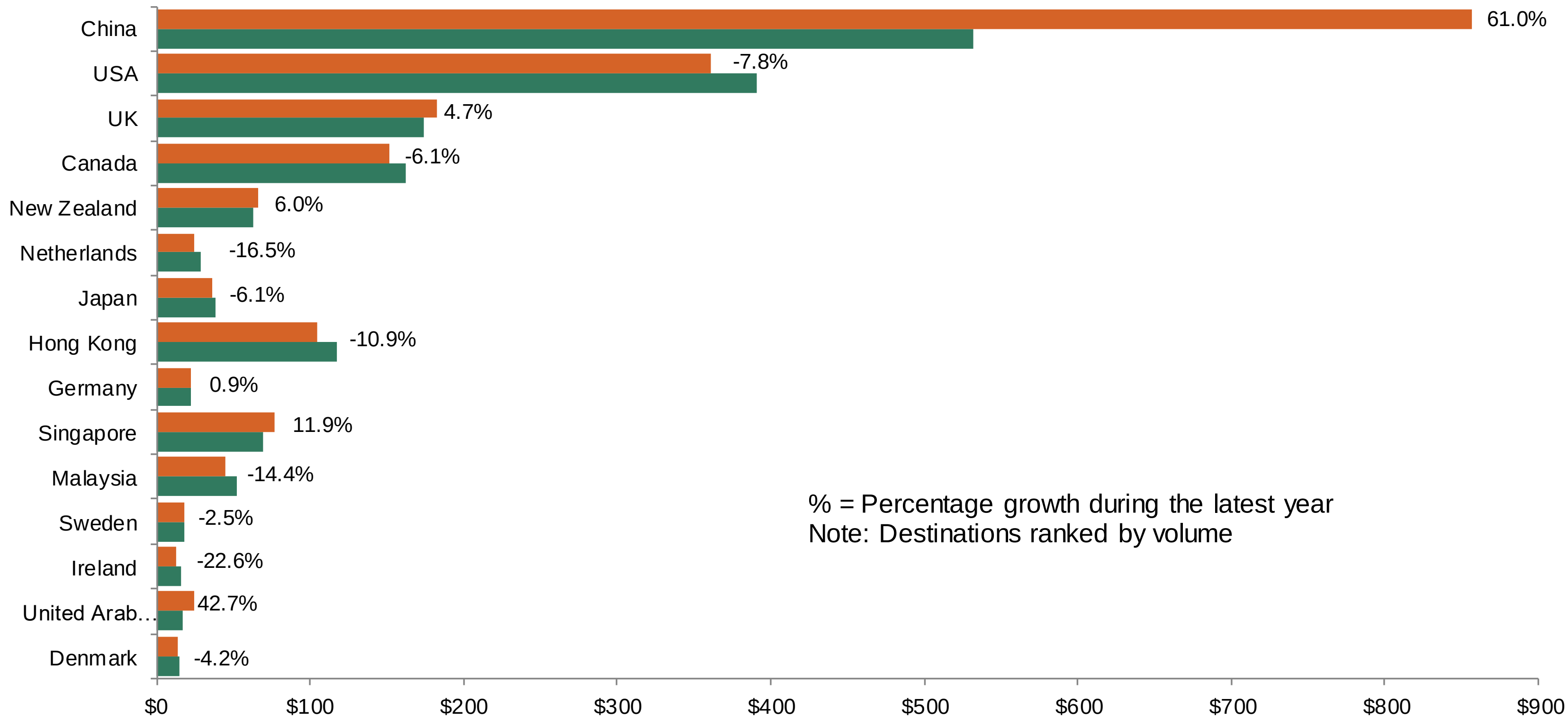
Change in average value (A$ per litre)



	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	4.9%	6.0%	-2.2%	-0.9%	-3.0%
Av. Val change	$0.27	$0.36	-$0.09	-$0.05	-$0.14

Bottled exports by top 15 destinations

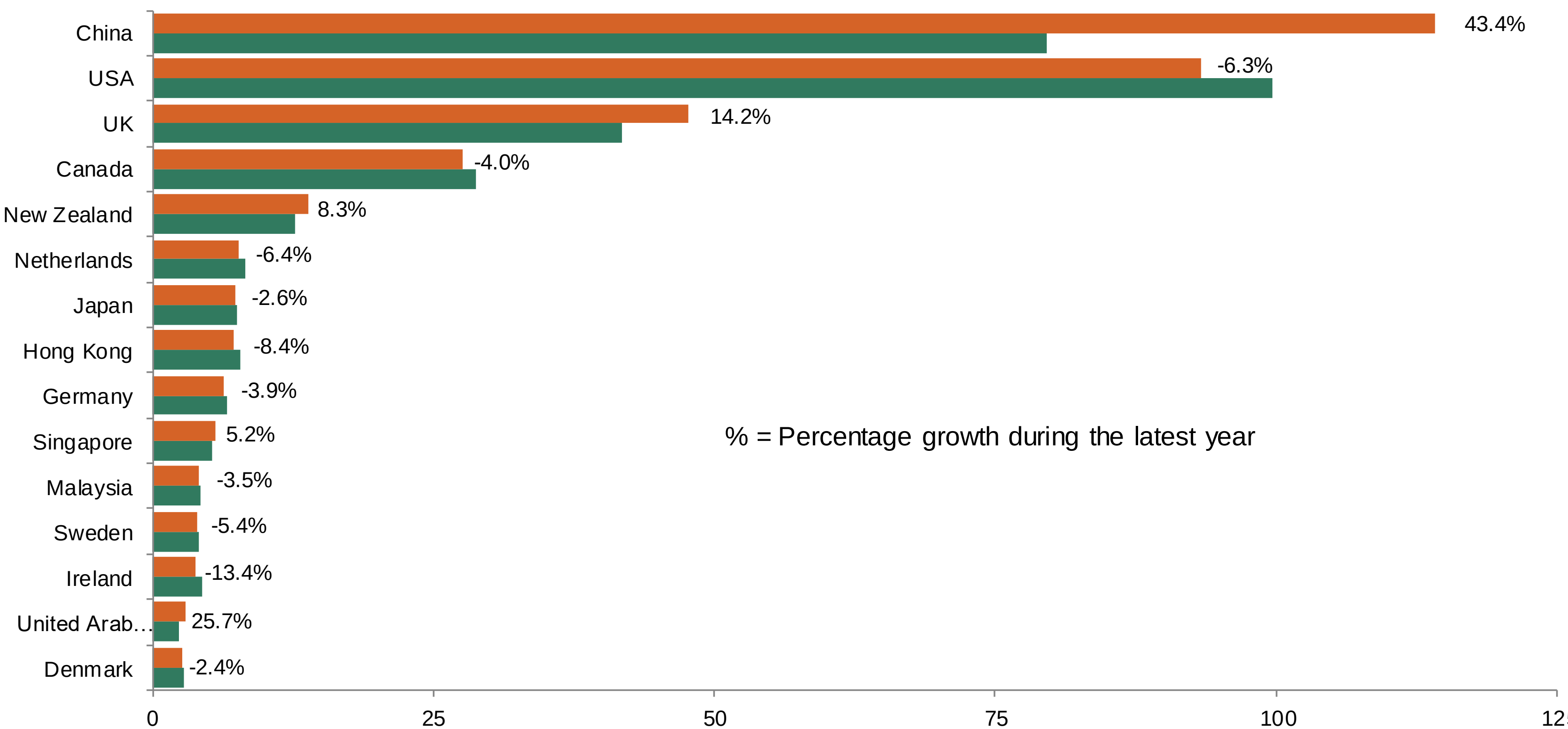
Value (million A$) for MAT March 2018



	Denmark	United Arab Emirates	Ireland	Sweden	Malaysia	Singapore	Germany	Hong Kong	Japan	Netherlands	New Zealand	Canada	UK	USA	China
2018	14.2	24.8	12.7	17.8	44.5	77.4	22.6	104.8	36.6	24.0	66.2	152.1	182.7	360.7	856.7
2017	14.8	17.4	16.4	18.2	52.0	69.1	22.4	117.5	38.9	28.8	62.5	161.9	174.5	391.3	532.1

Bottled exports by top 15 destinations

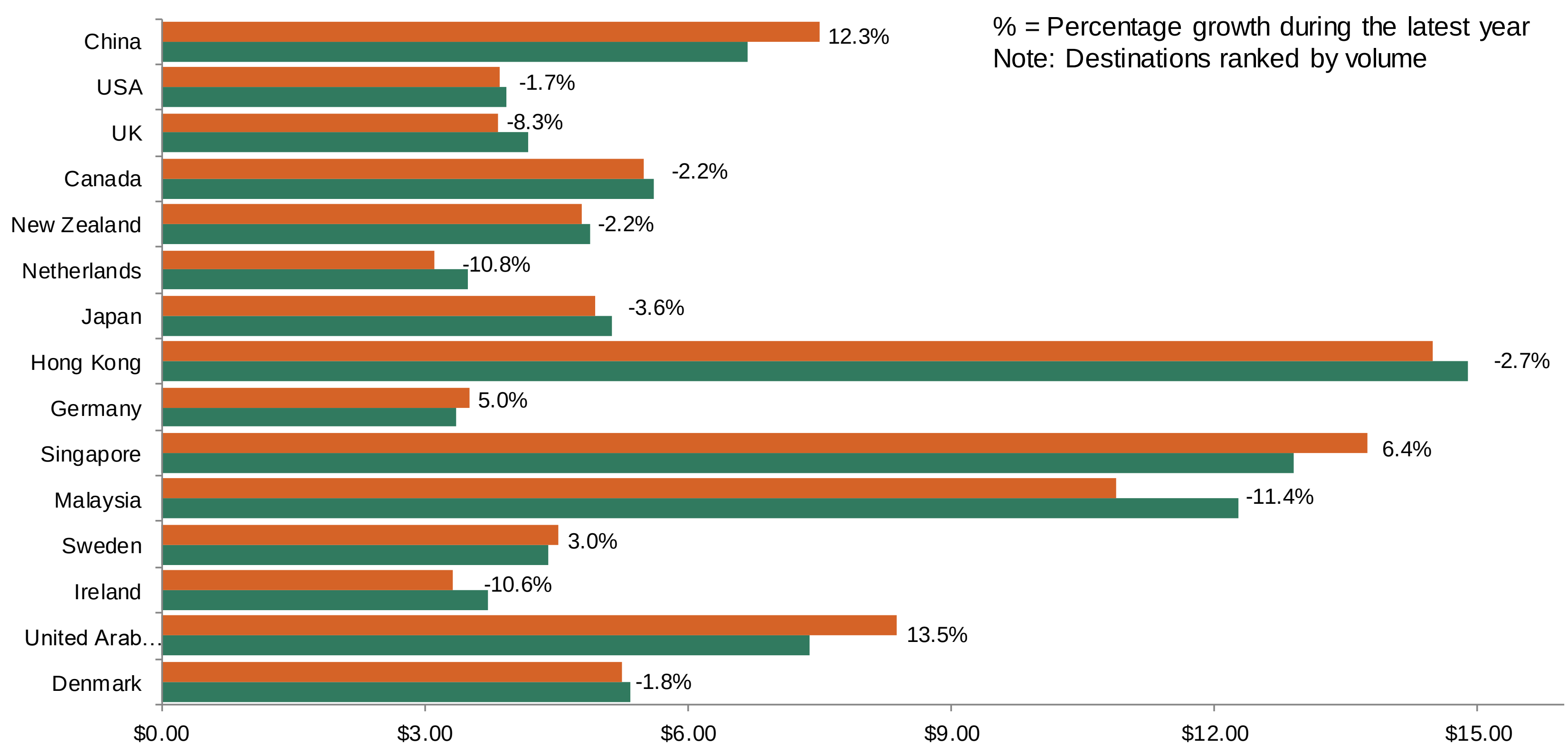
Volume (million litres) for MAT March 2018



	Denmark	United Arab Emirates	Ireland	Sweden	Malaysia	Singapore	Germany	Hong Kong	Japan	Netherlands	New Zealand	Canada	UK	USA	China
2018	2.7	3.0	3.8	3.9	4.1	5.6	6.4	7.2	7.4	7.7	13.8	27.6	47.7	93.4	114.1
2017	2.8	2.4	4.4	4.1	4.2	5.4	6.7	7.9	7.6	8.2	12.8	28.8	41.7	99.6	79.6

Bottled exports by top 15 destinations

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



	Denmark	United Arab Emirates	Ireland	Sweden	Malaysia	Singapore	Germany	Hong Kong	Japan	Netherlands	New Zealand	Canada	UK	USA	China
2018	$5.26	$8.39	$3.33	$4.54	$10.89	$13.75	$3.52	$14.51	$4.95	$3.12	$4.79	$5.50	$3.83	$3.86	$7.51
2017	$5.36	$7.39	$3.72	$4.40	$12.29	$12.92	$3.35	$14.91	$5.13	$3.49	$4.90	$5.62	$4.18	$3.93	$6.69

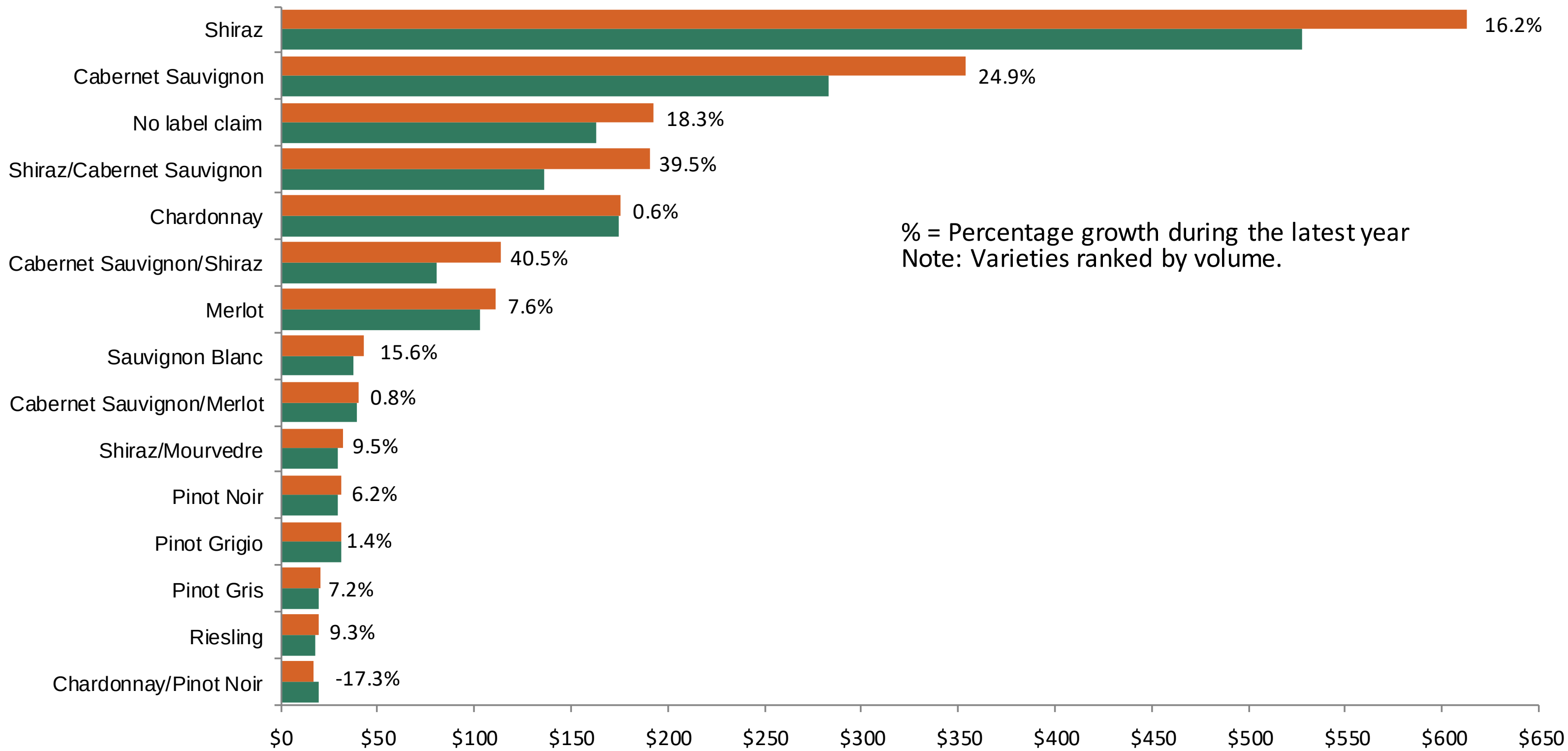
Bottled exports by top 15 variety label claims

MAT March 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	89.73	15%	612.83	16%	6.83	1%
Cabernet Sauvignon	52.06	13%	354.11	25%	6.80	10%
No label claim	41.76	33%	192.72	18%	4.62	-11%
Shiraz/Cabernet Sauvignon	33.27	10%	190.47	40%	5.73	27%
Chardonnay	47.42	4%	175.95	1%	3.71	-3%
Cabernet Sauvignon/Shiraz	5.25	20%	113.70	41%	21.64	18%
Merlot	28.57	7%	110.72	8%	3.87	0%
Sauvignon Blanc	12.38	22%	42.98	16%	3.47	-6%
Cabernet Sauvignon/Merlot	8.86	3%	39.89	1%	4.50	-2%
Shiraz/Mourvedre	1.67	-9%	31.92	10%	19.12	21%
Pinot Noir	5.67	0%	31.56	6%	5.56	6%
Pinot Grigio	8.80	4%	31.45	1%	3.57	-3%
Pinot Gris	6.45	13%	20.62	7%	3.20	-5%
Riesling	3.59	5%	19.97	9%	5.57	4%
Chardonnay/Pinot Noir	3.09	-14%	16.59	-17%	5.37	-4%

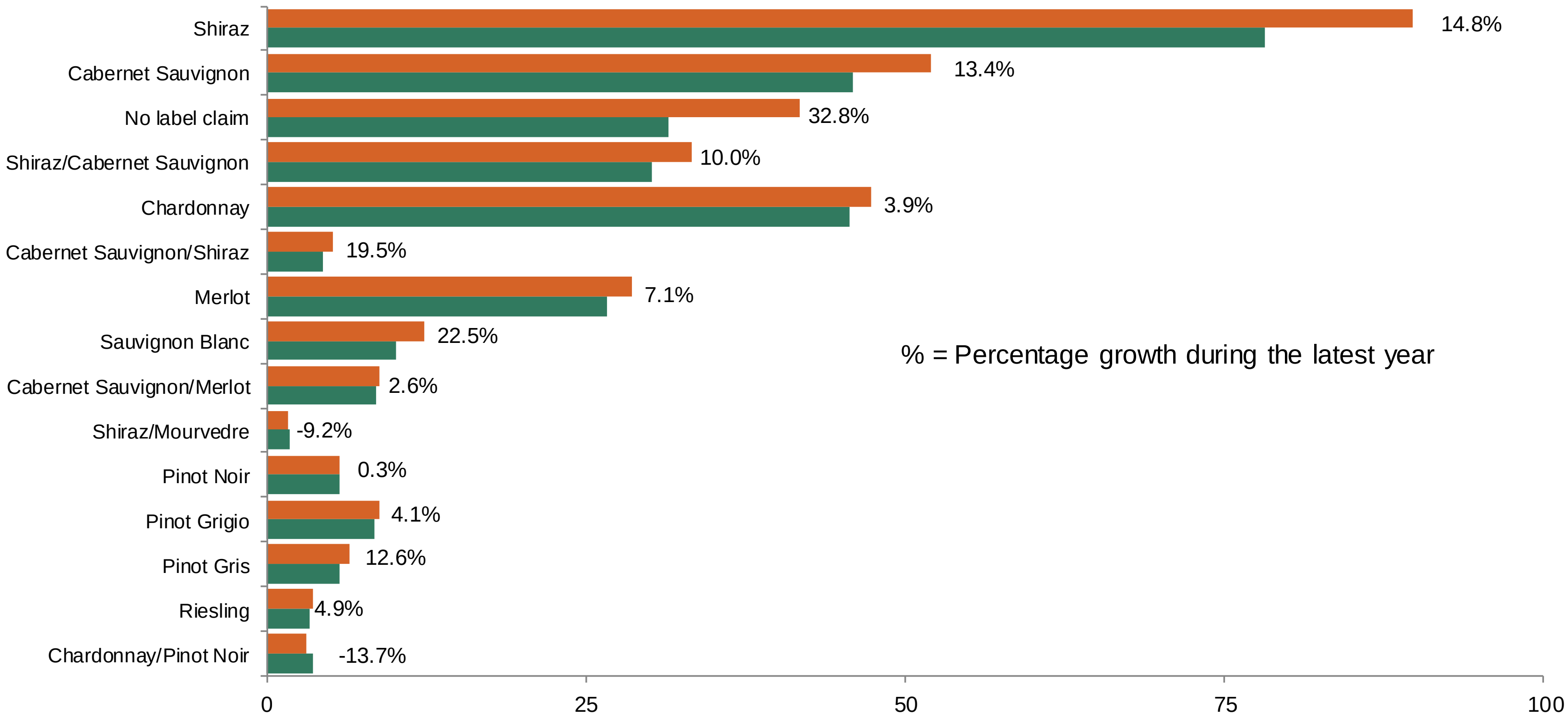
Bottled exports by top 15 variety label claims

Value (million A$) for MAT March 2018



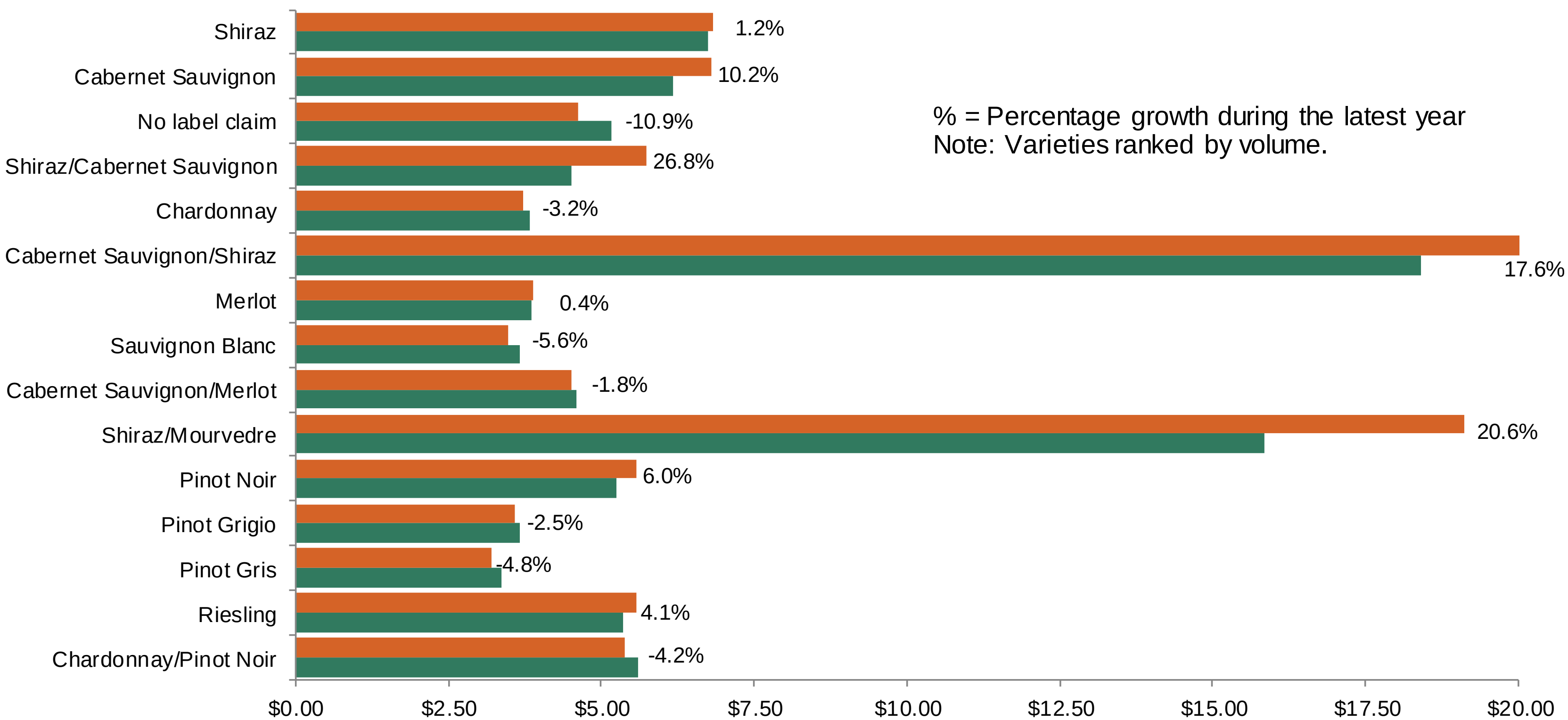
Bottled exports
by top 15 variety label claims

Volume (million litres) for MAT March 2018



Bottled exports by top 15 variety label claims

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



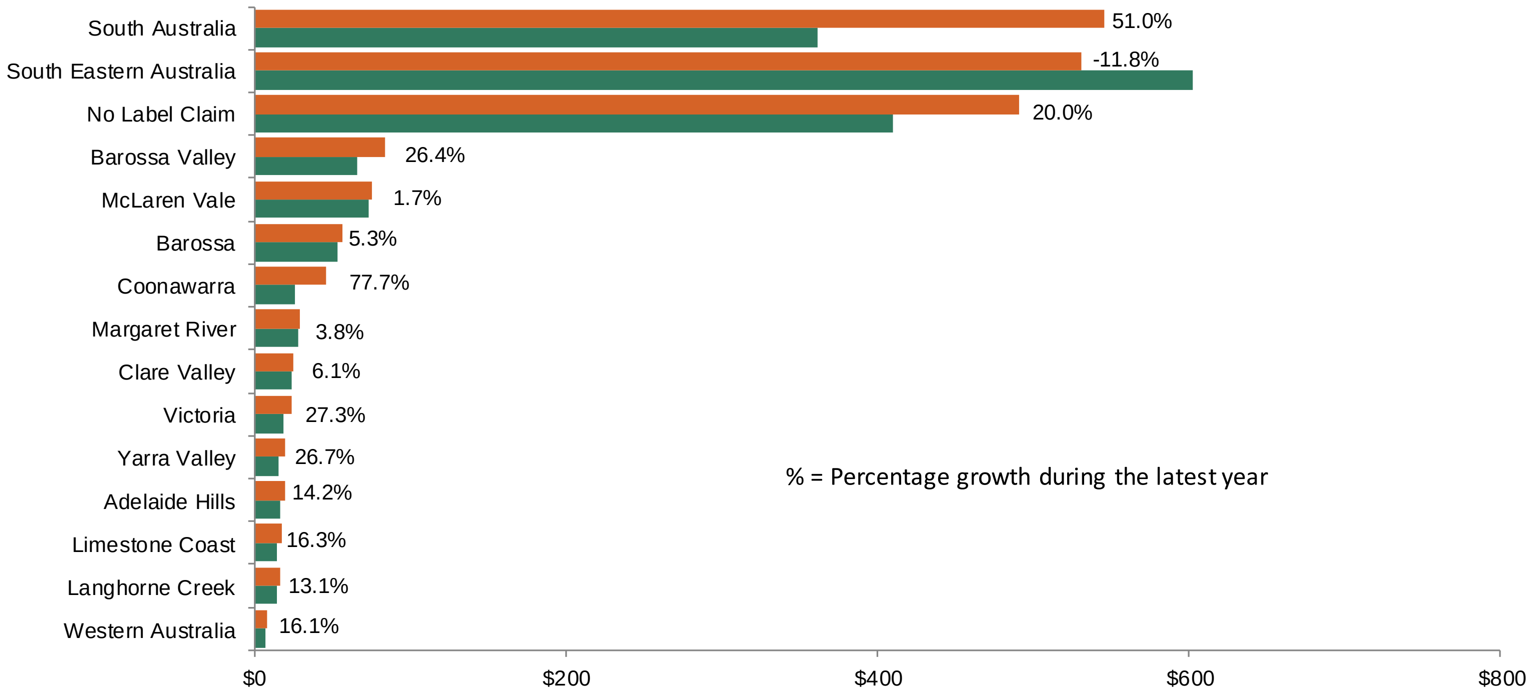
Bottled exports by top 15 GI region label claims

MAT March 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	57.36	27%	545.90	51%	9.52	19%
South Eastern Australia	154.77	-9%	531.21	-12%	3.43	-3%
No Label Claim	100.97	37%	491.61	20%	4.87	-13%
Barossa Valley	4.75	18%	83.60	26%	17.60	7%
McLaren Vale	6.69	-1%	75.04	2%	11.22	3%
Barossa	5.07	0%	56.39	5%	11.12	5%
Coonawarra	3.42	29%	45.73	78%	13.36	37%
Margaret River	2.39	0%	29.35	4%	12.28	3%
Clare Valley	3.12	24%	25.16	6%	8.08	-15%
Victoria	3.76	26%	23.42	27%	6.23	1%
Yarra Valley	1.38	12%	19.34	27%	14.04	13%
Adelaide Hills	2.08	16%	19.08	14%	9.19	-1%
Limestone Coast	2.92	32%	17.03	16%	5.83	-12%
Langhorne Creek	2.04	17%	16.57	13%	8.13	-3%
Western Australia	1.25	10%	8.38	16%	6.70	5%

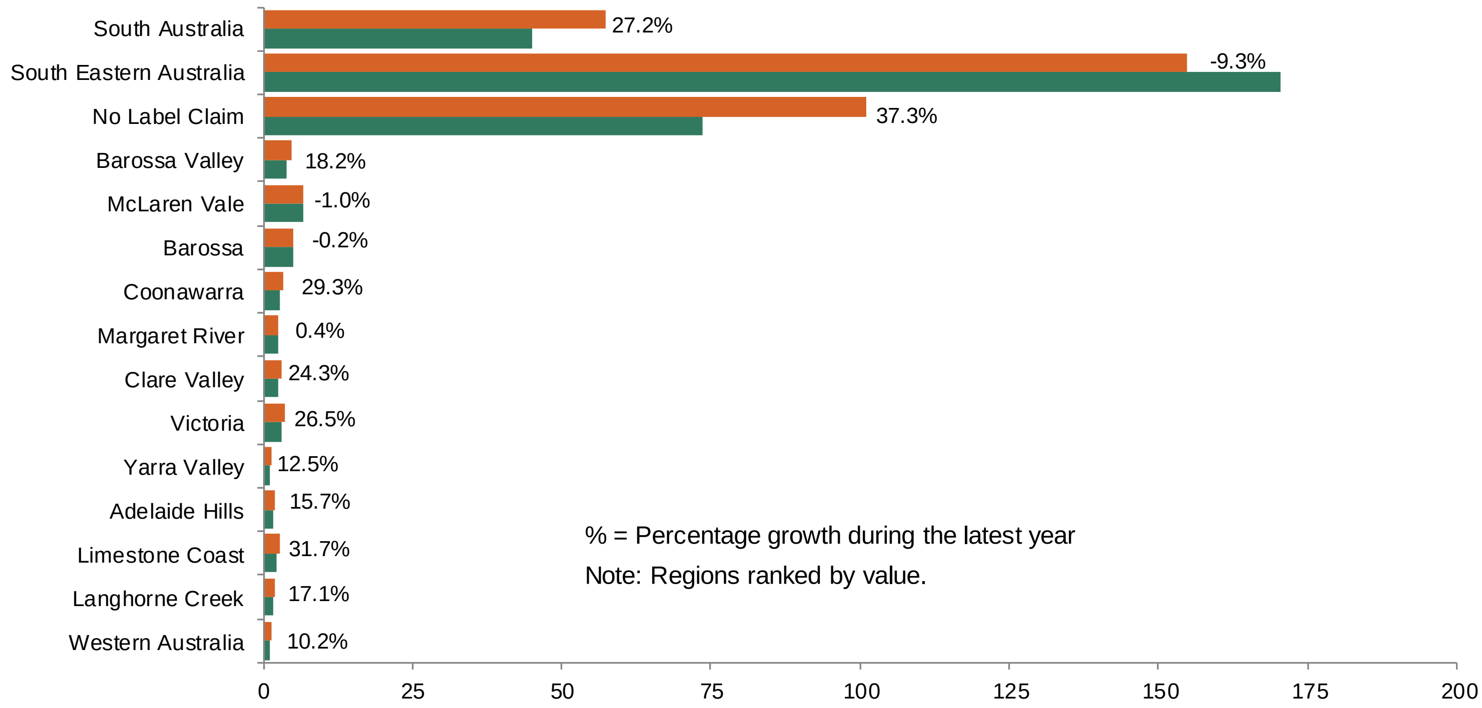
Bottled exports
by top 15 GI region label claims

Value (million A$) for MAT March 2018



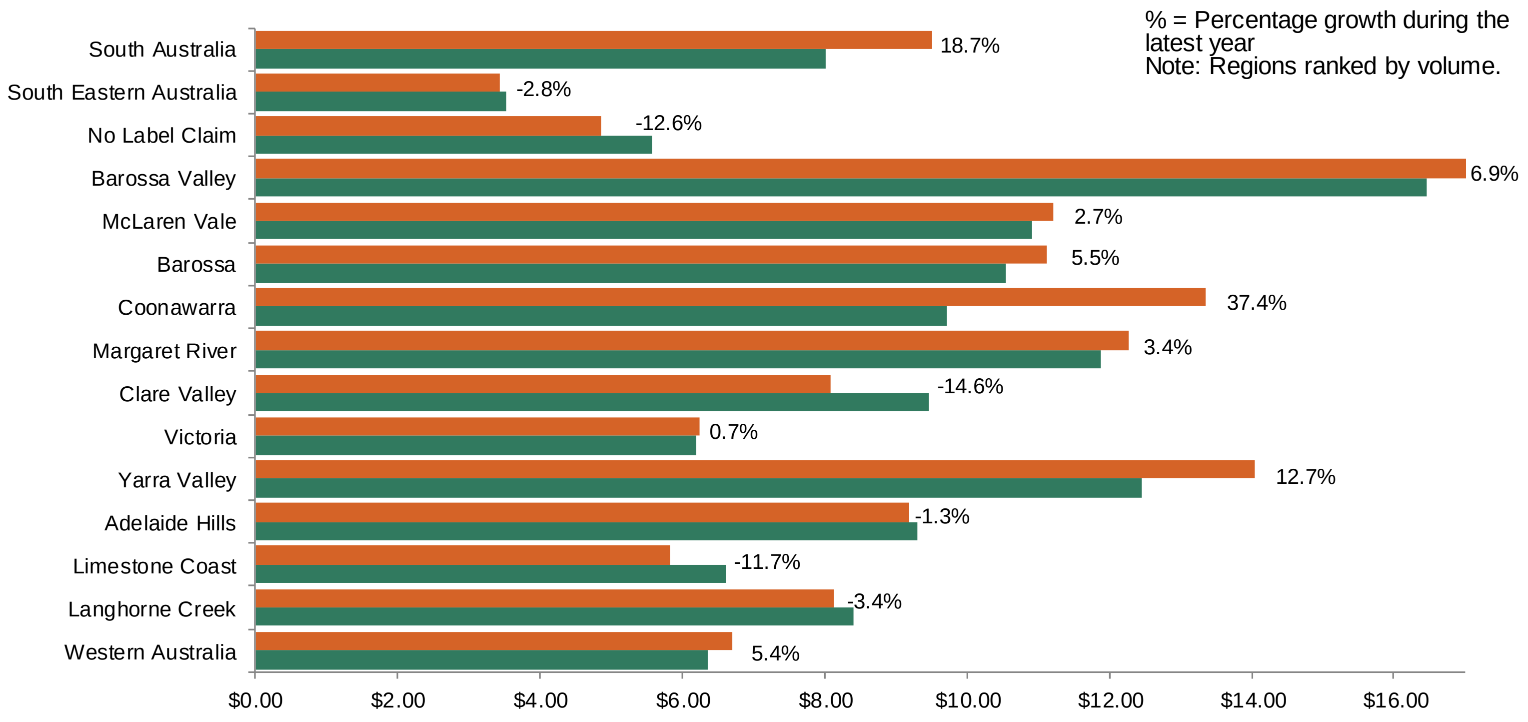
Bottled exports by top 15 GI region label claims

Volume (million litres) for MAT March 2018



Bottled exports by top 15 GI region label claims

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

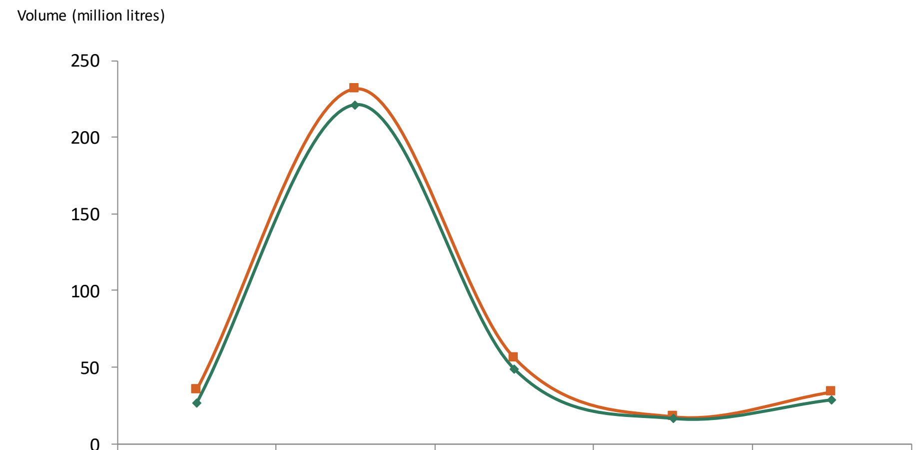


Bottled exports by price point

Volume

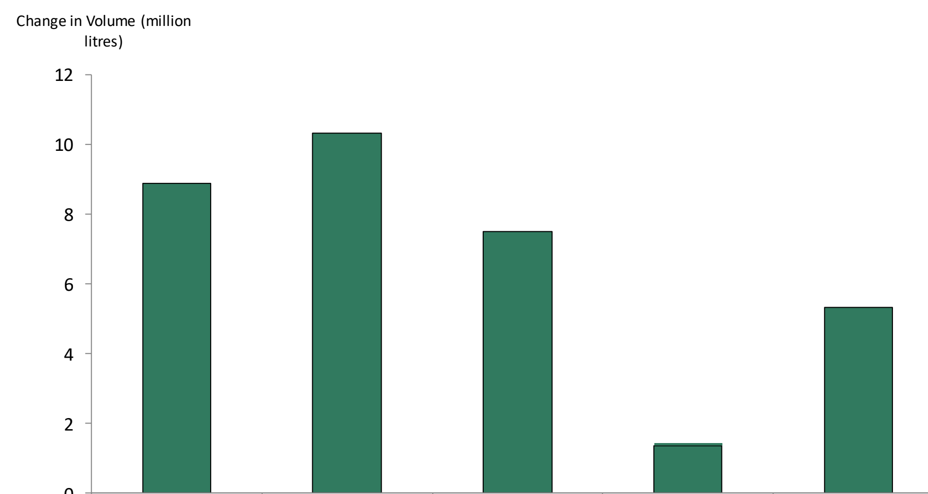
MAT March 2018

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	35	231	56	18	34
2017	26	221	49	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	33.5%	4.7%	15.5%	8.4%	18.8%
Vol change	8.9	10.3	7.5	1.4	5.3

Bulk wine exports report

Bulk wine exports by price point and destination

Value (‘000 A$) for MAT March 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 March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %	MAT March 2018 ('000 AUD)	Change %
UK	62	-84%	97,774	5%	73,668	77%	7,431	-61%	3,492	-59%	7,852	56%	190,279	14%
USA	-	na	36,390	2%	26,708	-18%	8,966	72%	1,689	26%	4,275	26%	78,028	0%
China	-	na	4,125	-75%	53,081	844%	6,908	218%	6,037	41%	4,080	-27%	74,230	115%
Canada	-	na	17,733	-15%	19,592	126%	328	82%	233	2227%	-	-100%	37,886	26%
Germany	-	na	18,994	6%	11,977	92%	159	-78%	965	365%	3,890	na	35,986	43%
New Zealand	71	na	6,654	0%	5,224	7%	497	5%	113	-32%	2,446	305%	15,004	17%
Netherlands	-	-100%	6,083	38%	4,022	77%	120	224%	-	na	-	-100%	10,225	51%
Denmark	9	na	3,222	-47%	3,263	701%	842	-10%	275	-13%	173	-52%	7,784	-4%
Finland	-	na	2,533	9%	2,882	26%	932	309%	51	na	415	-17%	6,813	27%
Belgium	-	na	4,364	-2%	1,832	2%	363	100%	48	na	-	na	6,606	3%
Japan	-	na	1,994	46%	2,635	500%	585	42%	48	-91%	163	-71%	5,425	64%
France	-	na	1,270	-53%	3,032	237%	443	121%	102	na	168	-7%	5,015	25%
Italy	-	-100%	872	182%	2,990	-81%	277	-22%	-	na	37	na	4,177	-74%
Sweden	-	na	203	-52%	764	27%	730	-41%	1,655	12%	113	-64%	3,465	-14%
Switzerland	-	na	500	4%	488	83%	73	-1%	101	5%	65	0%	1,228	25%
Thailand	-	na	221	-26%	866	118%	-	na	26	na	-	na	1,113	60%
Norway	-	na	-	-100%	879	57%	-	na	-	na	-	na	879	-4%
Poland	-	na	20	-83%	272	57%	236	20%	-	na	129	na	658	34%
Other	-	na	400	-12%	564	-21%	36	-59%	-	na	40	-97%	1,040	-63%
Total	142	-67%	203,353	-6%	214,739	71%	28,926	-8%	14,834	-12%	23,846	29%	485,840	19%

Bulk wine exports by price point and destination

Volume ('000 litres) for MAT March 2018

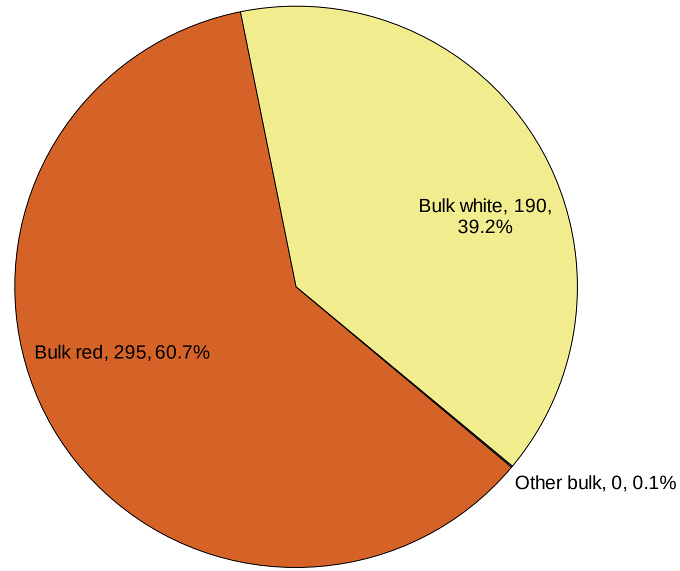
	$0.50 and under		$0.50 to $1.00		$1.00 to $1.50		$1.50 to $2.00		$2.00 to $2.50		$2.50 and above		Total	
	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %	MAT March 2018 ('000 Litres)	Change %
UK	175	-81%	121,360	-5%	64,053	73%	4,316	-60%	1,599	-58%	2,190	32%	193,693	6%
USA	-	na	42,502	-2%	22,053	-19%	5,591	86%	816	45%	1,046	16%	72,009	-4%
China	-	na	4,581	-77%	44,298	847%	4,104	226%	2,736	46%	1,177	-13%	56,896	98%
Canada	-	na	20,314	-19%	17,639	115%	190	69%	114	2174%	-	-100%	38,256	15%
Germany	-	na	22,223	-1%	10,208	79%	96	-76%	480	400%	1,224	na	34,232	19%
New Zealand	252	na	10,100	-3%	4,508	11%	312	8%	48	-33%	480	176%	15,700	5%
Netherlands	-	-100%	7,348	35%	3,458	68%	74	208%	-	na	-	-100%	10,880	44%
Denmark	48	na	4,003	-51%	3,109	828%	487	-12%	120	-17%	48	-44%	7,815	-15%
Belgium	-	na	5,320	-2%	1,637	0%	219	113%	24	na	-	na	7,201	0%
Finland	-	na	2,647	7%	2,403	18%	522	322%	25	na	123	-5%	5,720	20%
Japan	-	na	2,224	45%	2,270	451%	341	44%	24	-91%	48	-71%	4,907	88%
France	-	na	1,465	-56%	2,644	228%	244	113%	50	na	38	-18%	4,440	4%
Italy	-	-100%	1,007	226%	2,631	-80%	168	-22%	-	na	14	na	3,820	-73%
Sweden	-	na	214	-53%	618	21%	431	-38%	802	11%	24	-65%	2,089	-15%
Switzerland	-	na	624	4%	384	78%	48	1%	48	0%	24	0%	1,128	21%
Thailand	-	na	240	-23%	695	141%	-	na	12	na	-	na	947	58%
Norway	-	na	-	-100%	767	52%	-	na	-	na	-	na	767	-14%
Spain	-	na	168	-50%	384	0%	-	na	-	na	-	na	552	-23%
Other	-	na	288	-20%	292	-20%	168	0%	-	na	52	-81%	800	-31%
Total	475	-56%	246,628	-11%	184,053	67%	17,310	-5%	6,897	-9%	6,487	31%	461,851	10%

Bulk exports by colour/ wine style

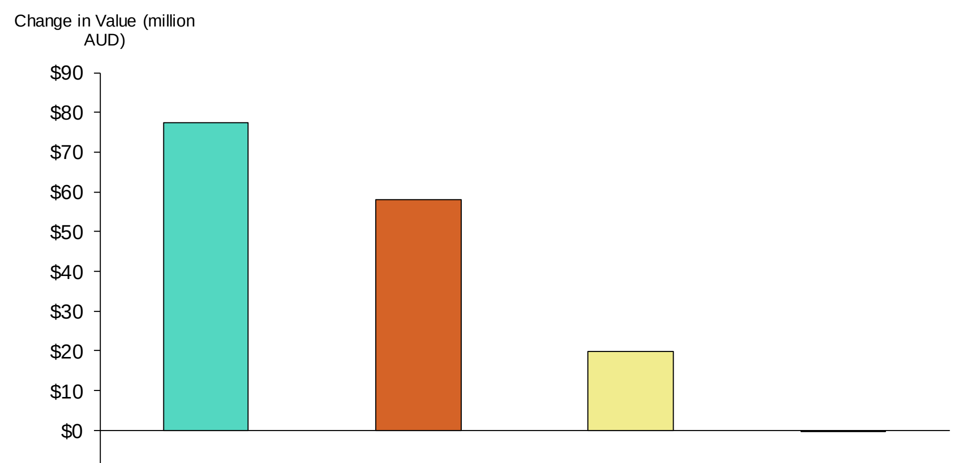
Value

MAT March 2018

Value (A$ million)



Change in Value (A$ million)

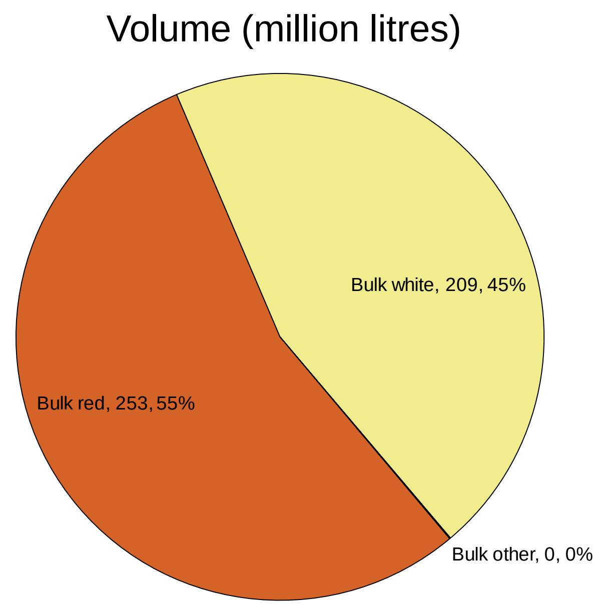


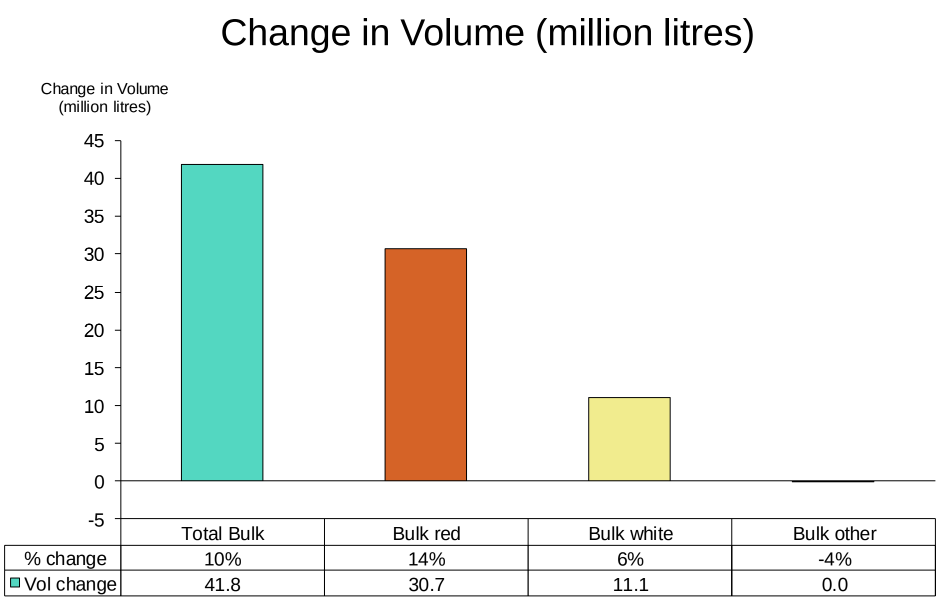
	Total Bulk	Bulk red	Bulk white	Other bulk
% change	19.0%	24.4%	11.6%	-43.5%
Val change	77.4	58.0	19.8	-0.3

Bulk exports by colour/ wine style

Volume

MAT March 2018



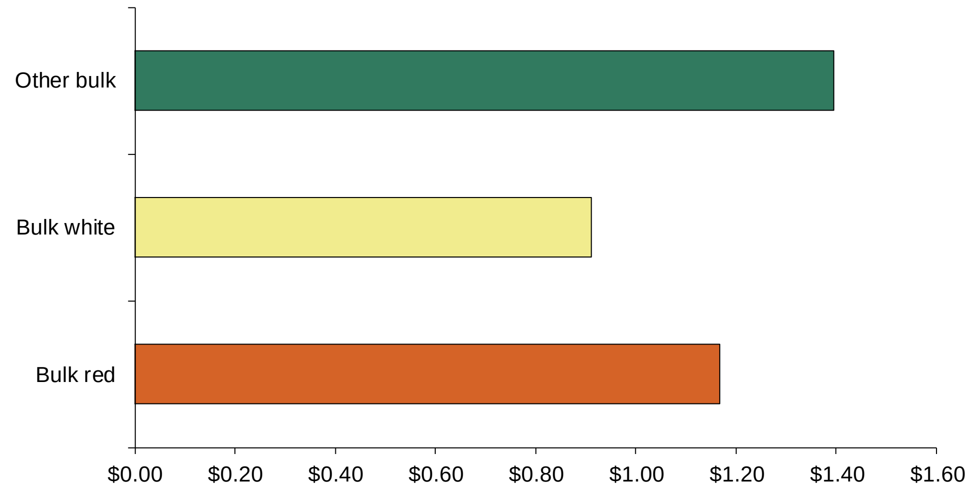


Bulk exports by colour/ wine style

Average value

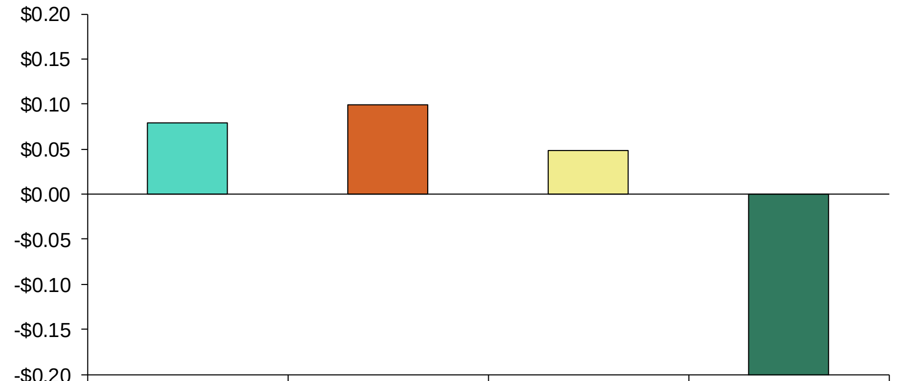
MAT March 2018

Average value (A$ per litre)



	Bulk red	Bulk white	Other bulk
2018	$1.17	$0.91	$1.40

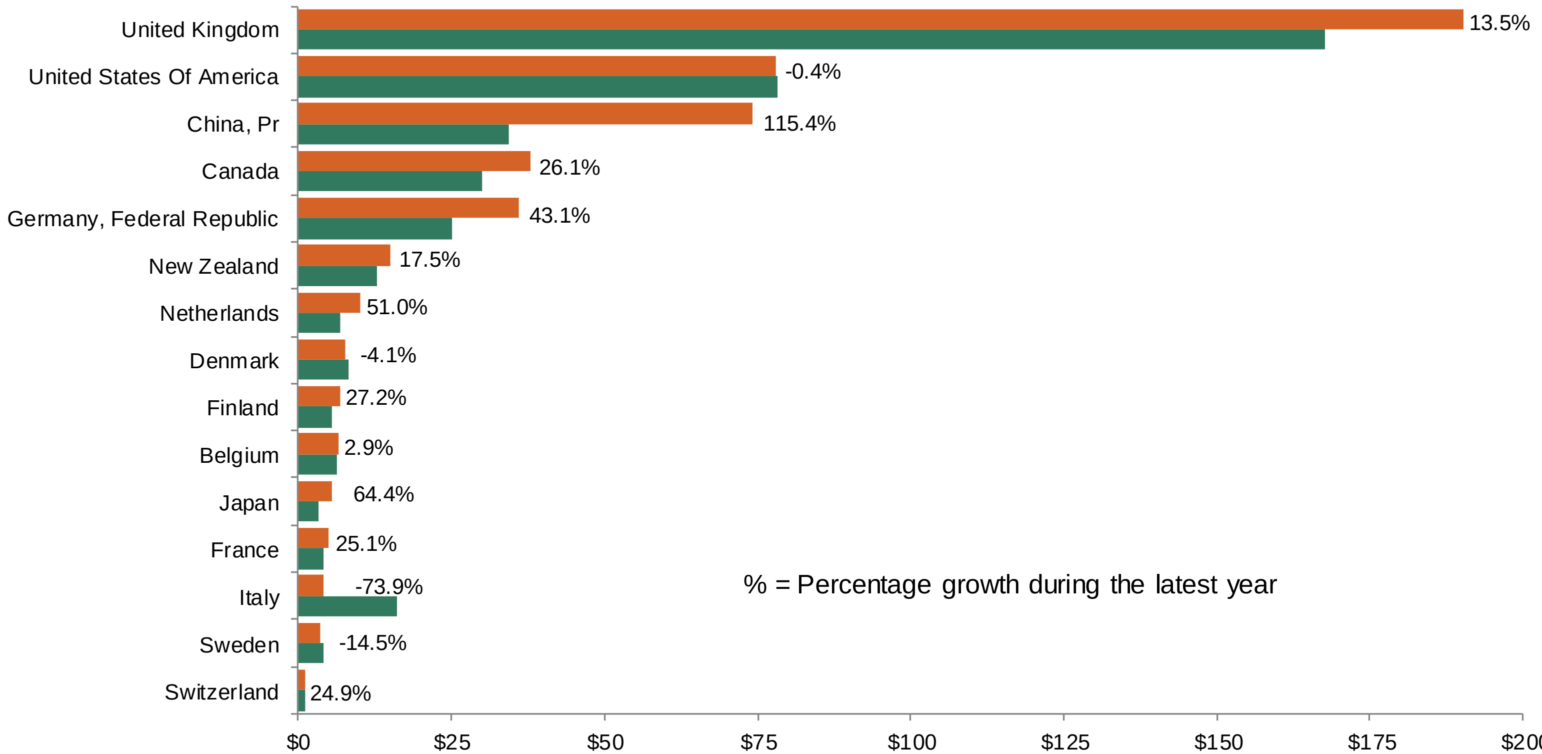
Change in average value (A$ per litre)



	Total Bulk	Bulk red	Bulk white	Other bulk
% change	8.2%	9.3%	5.7%	-41.4%
Av. Val change	$0.08	$0.10	$0.05	-$0.99

Bulk exports
by top 15 destinations

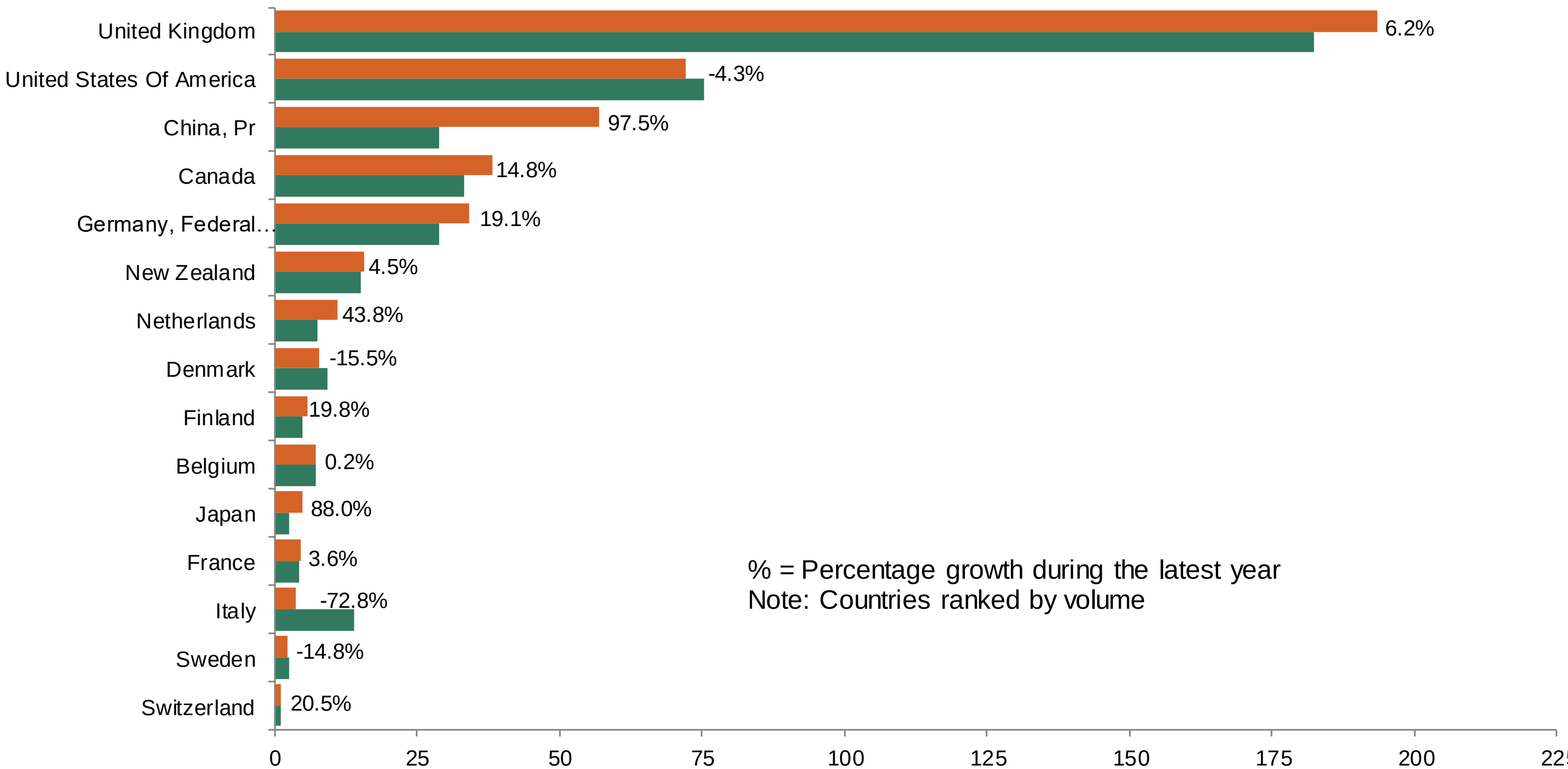
Value (million A$) for MAT March 2018



	Switzerland	Sweden	Italy	France	Japan	Belgium	Finland	Denmark	Netherlands	New Zealand	Germany, Federal Republic	Canada	China, Pr	United States Of America	United Kingdom
2018	1.2	3.5	4.2	5.0	5.4	6.6	6.8	7.8	10.2	15.0	36.0	37.9	74.2	78.0	190.3
2017	1.0	4.1	16.0	4.0	3.3	6.4	5.4	8.1	6.8	12.8	25.1	30.1	34.5	78.4	167.6

Bulk exports by top 15 destinations

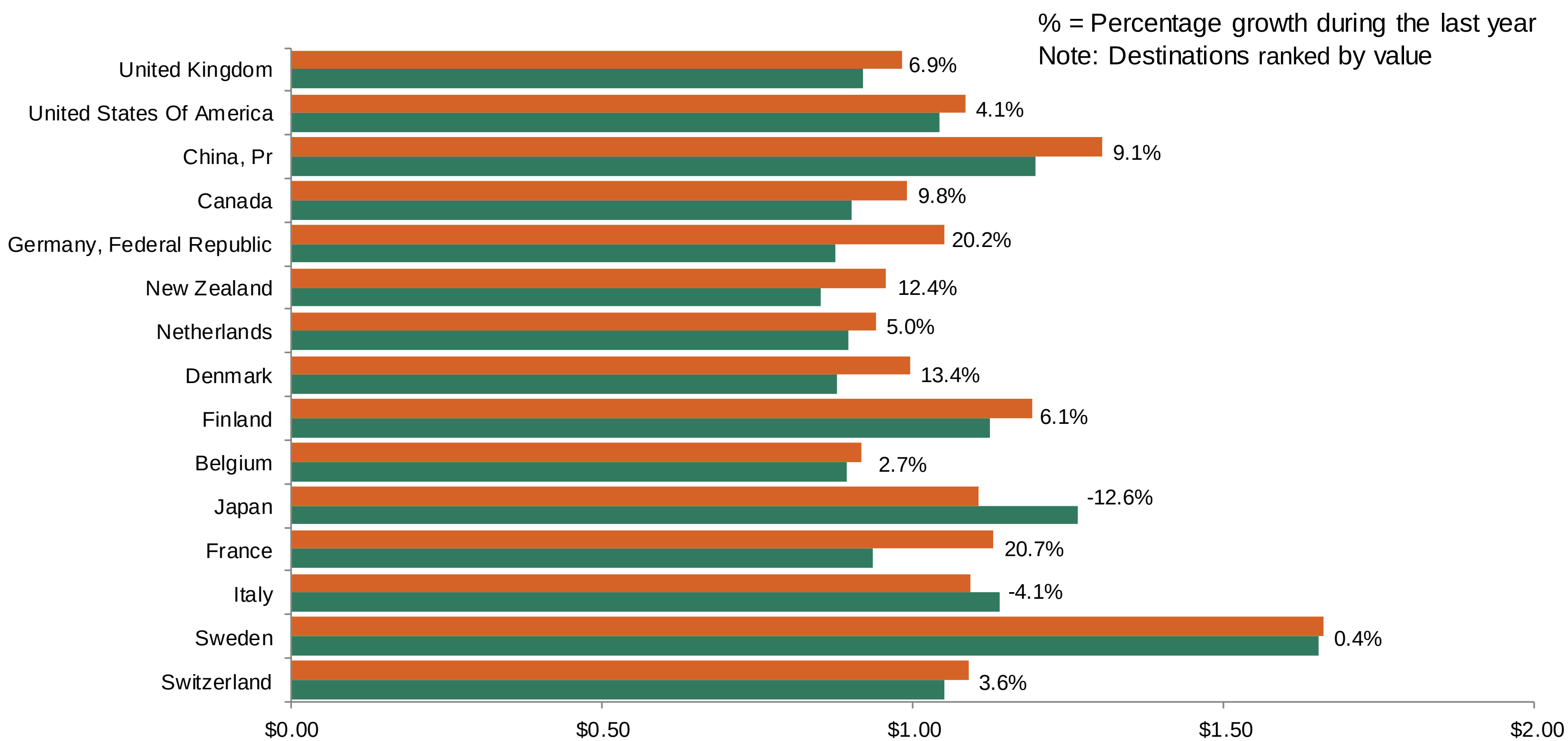
Volume (million litres) for MAT March 2018



	Switzerland	Sweden	Italy	France	Japan	Belgium	Finland	Denmark	Netherlands	New Zealand	Germany, Federal Republic	Canada	China, Pr	United States Of America	United Kingdom
2018	1.1	2.1	3.8	4.4	4.9	7.2	5.7	7.8	10.9	15.7	34.2	38.3	56.9	72.0	193.7
2017	0.9	2.5	14.1	4.3	2.6	7.2	4.8	9.2	7.6	15.0	28.7	33.3	28.8	75.3	182.4

Bulk exports by top 15 destinations

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



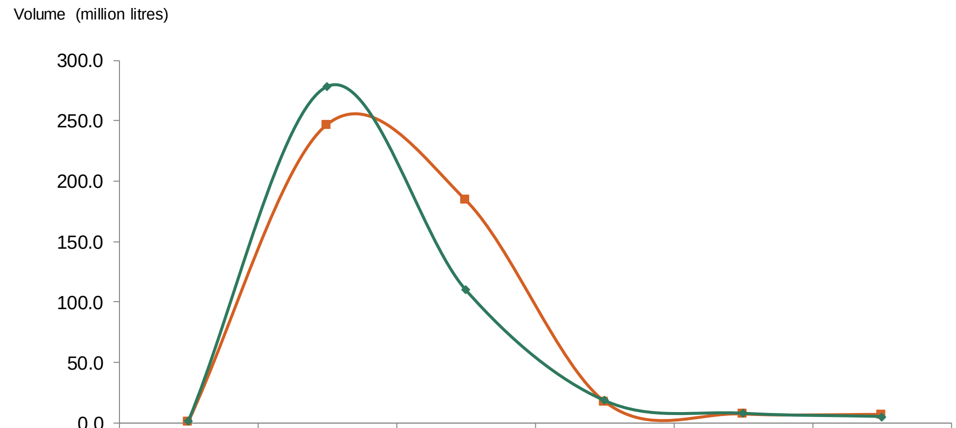
	Switzerland	Sweden	Italy	France	Japan	Belgium	Finland	Denmark	Netherlands	New Zealand	Germany, Federal Republic	Canada	China, Pr	United States Of America	United Kingdom
2018	$1.09	$1.66	$1.09	$1.13	$1.11	$0.92	$1.19	$1.00	$0.94	$0.96	$1.05	$0.99	$1.30	$1.08	$0.98
2017	$1.05	$1.65	$1.14	$0.94	$1.26	$0.89	$1.12	$0.88	$0.89	$0.85	$0.87	$0.90	$1.20	$1.04	$0.92

Bulk exports by price point

Volume

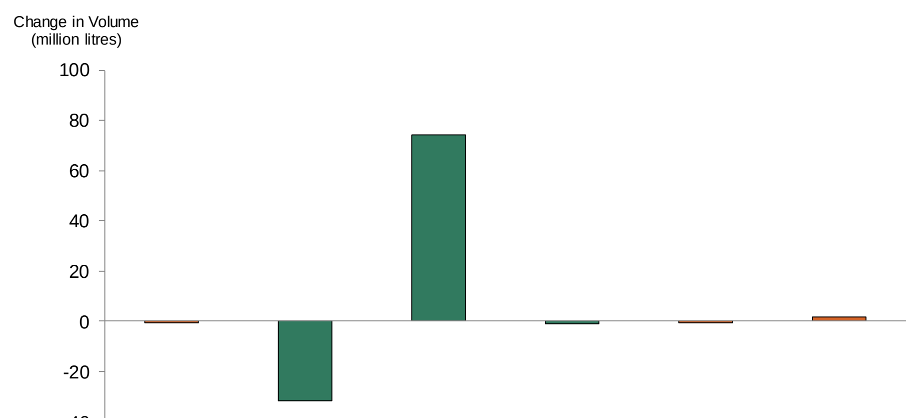
MAT March 2018

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	246.6	184.1	17.3	6.9	6.5
2017	1	278	110	18	8	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	-55.8%	-11.4%	67.5%	-4.8%	-9.3%	31.2%
Vol change	-0.6	-31.7	74.2	-0.9	-0.7	1.5

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