

Wine
Australia
providing
insights on
Australian
Wine

Export Report
Moving Annual Total (MAT)
To March 2020

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Summary report

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Executive summary

- Continued growth in premium wine exports saw value increase by 3 per cent to \$2.87 billion, despite volume decline,
- Two consecutive lower Australian vintages contributed to the volume decline,
- The average value of exports achieved \$3.96 per litre FOB, with the average value of bottled exports reaching a record value of \$7.12 per litre FOB,
- The early effects of the COVID-19 pandemic can be observed in exports to China for the March 2020 quarter, but it is too early to tell what the effect will be in other markets,
- The growth centre for Australian wine exports continues to be Asia.

Commentary

Overview

In the year ended March 2020, Australian wine exports increased by 3 per cent in value to \$2.87 billion and declined by 11 per cent in volume to 728 million litres (81 million 9-litre case equivalents). The average value of exported wine increased by 16 per cent to \$3.95 per litre free on board (FOB), the highest year ended March value since 2005.

Total export value for the quarter ended March 2020 declined by 7 per cent compared to the same quarter in the previous year. This was largely driven by a decline in exports to mainland China during the month of March, as a result of wide-scale lockdowns in response to the coronavirus pandemic. Coronavirus impacts on exports were only able to be observed in exports to China as this was the first epicentre of the virus. Based on exports to the end of March, it is too early to tell what the effect of the subsequent world-wide spread of the virus has had, and will have, on exports to other destinations.

Total export volume continued its decline, driven mainly by lower price segments. This comes after a record volume of exports in 2018, which followed a record Australian wine grape harvest in 2017. However, there is now less wine available for export as there were two consecutive lower vintages in 2018 and 2019 and inventory has already been drawn down.

Packaged and unpackaged wine

Glass bottle exports increased by 7 per cent in value to \$2.37 billion and decreased by 7 per cent in volume to 332 million litres (37 million 9-litre case equivalents). This translated to a 14 per cent increase in the average value of bottled exports to \$7.12 per litre FOB, a record value. This rise in average value is due to an increase in exports at premium end of the price spectrum.

Unpackaged wine exports decreased by 9 per cent in value to \$490 million and 14 per cent in volume to 388 million litres (43 million 9-litre case equivalents). Due to the volume decline outpacing the value decline, the average value of unpackaged wine exports increased by 5 per cent to \$1.26 per litre FOB. The average value of unpackaged exports has remained high at levels not seen since late 2005 due to the relative short supply of Australian wine in comparison to other source countries. This reflects the continued demand for Australian wine even in a more competitive bulk wine market. The International Organisation of Vine and Wine (OIV) reported that the volume of global wine production increased by 4.4 billion litres in 2018 with production increasing from the big three: Italy, France and Spain, as well as Chile. The preliminary estimate for 2019 global production is for a near-average 26.3 billion litres.

Price segments

In the year ended March 2020, the largest decrease in value was seen at price segments below \$5 per litre FOB (see Figure 1). On the other hand, exports above \$10 per litre FOB increased by 22 per cent to \$1.08 billion, with the \$50 to \$99.99 segment being the key driver of this value growth.

Figure 1: Total exports by price segment (\$ million FOB)

Price segment (A\$/litre)	MAT March 2020	Value change	Growth rate
\$2.49 and under	\$457	-\$70	-13%
\$2.50 to \$4.99	\$793	-\$36	-4.4%
\$5.00 to \$7.49	\$385	\$12	3.3%
\$7.50 to \$9.99	\$158	-\$7.2	-4.4%
\$10.00 to \$14.99	\$253	\$11	4.7%
\$15.00 to \$19.99	\$87	\$13	17%
\$20.00 to \$29.99	\$211	-\$13	-5.9%
\$30.00 to \$49.99	\$141	\$37	35%
\$50.00 to \$99.99	\$266	\$103	64%
\$100.00 to \$199.99	\$65	\$31	88%
\$200.00 +	\$57	\$12	27%
Total value	\$2,873	\$93	3.4%

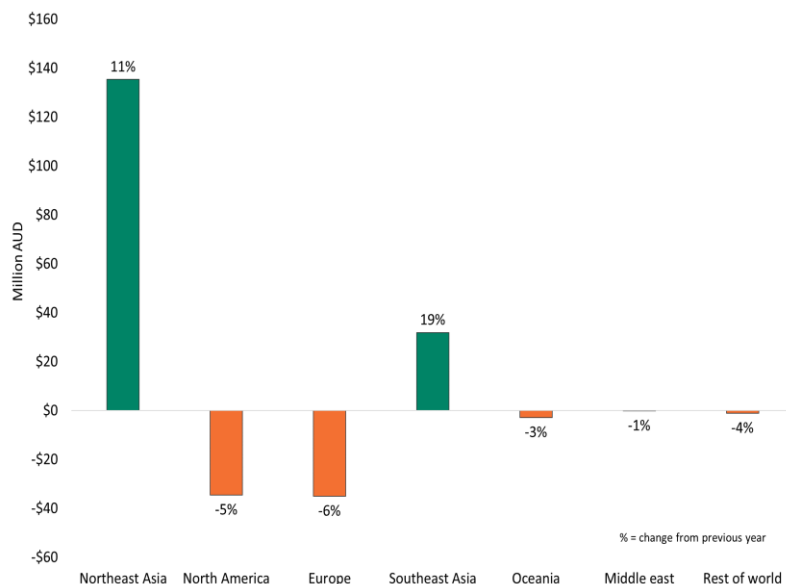
Commentary (continued)

Destinations

In the past 12 months, Australian exporters have shipped wine to 119 destinations. Northeast and Southeast Asia continue to be the source of growth for Australian exports, increasing in value by 11 and 19 per cent respectively (see Figure 2). All other regions declined:

- North America, by 5 per cent to \$596 million,
- Europe, by 6 per cent to \$577 million,
- Oceania, by 3 per cent to \$105 million, and
- Middle East, by 1 per cent to \$32 million.

Figure 2: Change in value of exports by region



The top five destinations by value were:

- Mainland China, up 15 per cent to \$1.15 billion
- United States of America, down 2 per cent to \$416 million
- United Kingdom, down 10 per cent to \$347 million
- Canada, down 13 per cent to \$179 million
- Singapore, up 20 per cent to \$103 million.

The top five destinations by volume were:

- United Kingdom, down 9 per cent to 219 million litres
- United States of America, down 11 per cent to 136 million litres
- Mainland China, down 11 per cent to 130 million litres
- Canada, down 26 per cent to 52 million litres
- New Zealand, down 8 per cent to 30 million litres.

China

Australian wine exports to China (including Hong Kong and Macau) increased by 13 per cent in value to \$1.25 billion and decreased 11 per cent in volume to 137 million litres (15.2 million 9-litre case equivalents) in the year ended March 2020. The average value of exports increased by 27 per cent to \$9.11 per litre FOB, a record level.

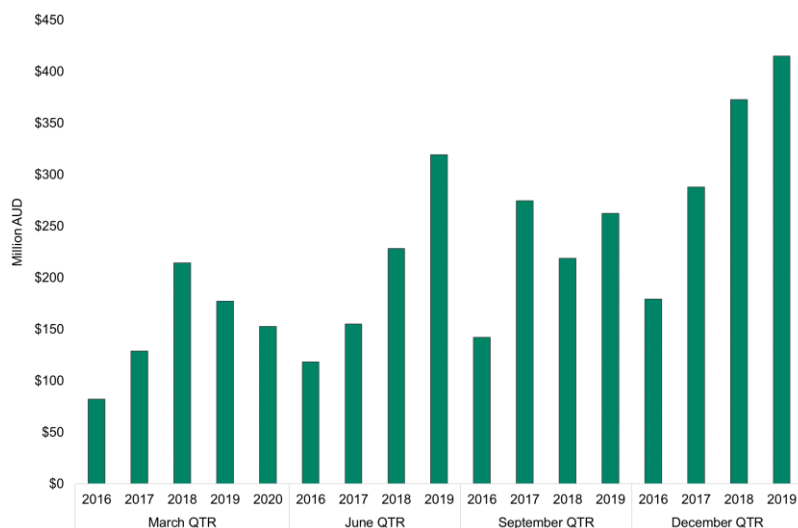
Mainland China

Exports to mainland China increased by 15 per cent in value to \$1.15 billion and decreased by 11 per cent in volume to 130 million litres (14.4 million 9-litre case equivalents). Average value increased by 30 per cent to \$8.86 per litre FOB.

Commentary (continued)

In many ways 2020 started off much the same as the past few years for Australian exports to China. The first quarter of the calendar year is historically the quietest (see Figure 3) as most exporters want to get their wine into market ahead of Chinese New Year, and therefore ship in the December quarter. In fact, the value of exports in January and February 2020 combined (\$106 million) was 13 per cent higher than the same months in 2019 (\$94 million).

Figure 3: Quarterly export value to mainland China



The first reports of COVID-19 in China have been traced back to late December 2019, but areas of China were not locked down (i.e. restricting the movement of people and closing non-essential businesses) until 23 January 2020. It is therefore not surprising that no difference is seen in the export figures until March as most shipments for January and February would either have been on their way or already approved by then.

The China Alcoholic Drinks Association has reported a 16 per cent drop in sales revenue in January and February for domestic distilleries and wineries, with wine sales suffering the largest decline. Unlike Western markets, where buying wine has been part of the 'stockpiling' mentality, this did not translate in China, where wine is still not intrinsic within its culture.

The latest wine import figures from Global Trade Atlas, for the year ended February 2020, show total imports decreased by 17 per cent in value (USD) and 14 per cent in volume. This decline was driven by French bottled imports, down by 39 per cent in value. Australia's bottled imports increased by 11 per cent in value and was the only source country not to show a decline in bottled wine value during the time period.

March is where the effects of the lockdown start to become apparent in the export data. Australian export value in March 2020 was 43 per cent lower than in 2019. This led to the quarter ending March 2020 being 14 per cent lower than the same quarter in 2019.

This quarterly decline was felt across the price spectrum, with exports above \$10 per litre FOB declining by 12 per cent to \$87 million and exports below \$10 per litre FOB declining by 15 per cent to \$66 million. The value of wine exported in glass bottles also declined for the quarter, by 15 per cent to \$139 million. Unpackaged wine exports increased, however, by 9 per cent to \$14 million.

While the quarterly results are not the ideal start to the year, the strong performance of Australian wine exports up to this point means that the year ended March 2020 still presents a good result for the sector and has earned the category an established place in the Chinese wine market. This will no doubt help in the uncertain months to come. With the decline in new cases of COVID-19, China is slowly opening back up, but it is still unclear how quickly the orders for wine will recommence.

Commentary (continued)

Stuart Barclay, Wine Australia's General Manager Marketing, said 'China is now starting to return to a "new sense" of normality, however many on-premise venues are still closed, and life is very different to just a few months ago.

The Wine Australia office in Shanghai is now fully open and very active promoting Australian Wine and planning for the future.

'Late September will see the rescheduled China Roadshow 2020 visit Nanjing, Qingdao, Xiamen and Guangzhou and will form an important part of getting back into the important China market and supporting our wine community. Plans are in full swing for Prowine November 2020 in Shanghai and a return to CFDF & Top wine Chengdu in May 2021.

'Consumer activations are occurring online with a significant social media campaign that launched in January 2020 which is seeing very good engagement results with the Chinese consumer wanting more information on Australian wines. Retail activations are also returning, and Wine Australia is partnering with a number of key retailers in the next few weeks.

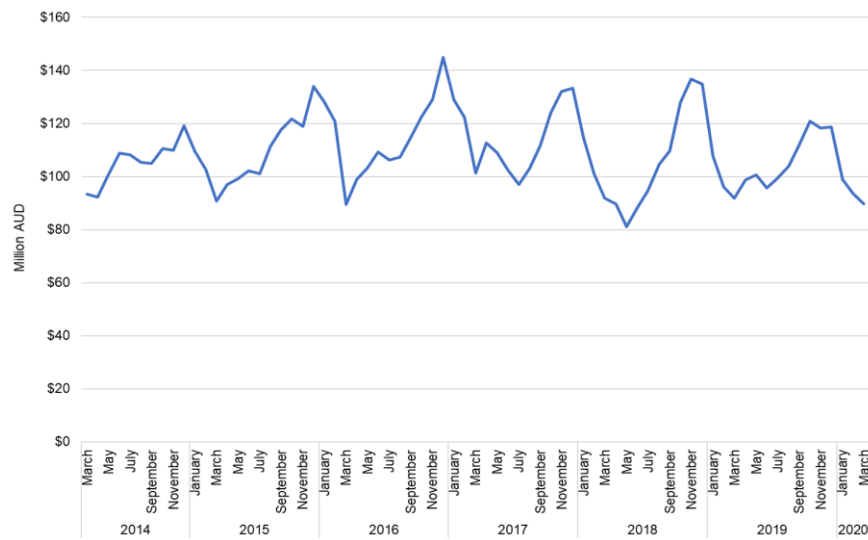
'Australian wine is therefore well placed to maintain its position in China. With Australia the only country showing growth in bottled wine imports in China for the year ending February 2020, there is confidence that the market will recover well for Australian wines despite uncertain market conditions.'

North America

United States of America

Although the United States of America (USA) is now the epicentre for the pandemic, the March export figures do not reflect a change in trends yet (see Figure 4). In the year ended March 2020, Australian exports to the USA decreased by 2 per cent in value to \$416 million and by 11 per cent in volume to 136 million litres (15.1 million 9-litre case equivalents). Average value increased by 11 per cent to \$3.06 per litre, the highest average value since year ending August 2009. Quarterly performance was similar to the year ending results for total value, down by 2 per cent compared to the quarter ending March 2019.

Figure 4: Rolling quarterly export value to the USA



Commentary (continued)

In the year ended March 2020, the value of glass bottle exports to the USA increased by 1 per cent in value to \$346 million, while unpackaged exports declined by 16 per cent to \$70 million. The average value of bottled wine increased by 6 per cent to \$4.36 per litre FOB, driven by the increase in premium wine exports to the USA. Exports above \$10 per litre FOB increased by 10 per cent in value to \$45 million, with most of the growth concentrated in shipments with an average value between \$10 and \$14.99 per litre FOB (see Figure 5). The biggest driver of overall value growth was the \$2.50 to \$4.99 FOB segment.

Figure 5: Exports to the USA by price segment (\$ million FOB)

Price segment (A\$/litre)	MAT March 2020	Value change	Growth rate
\$2.49 and under	\$72	-\$18	-20%
\$2.50 to \$4.99	\$261	\$8.1	3%
\$5.00 to \$7.49	\$23	\$0.6	3%
\$7.50 to \$9.99	\$15	-\$3.5	-19%
\$10.00 to \$14.99	\$23	\$4.9	28%
\$15.00 to \$19.99	\$7.1	-\$0.9	-11%
\$20.00 to \$29.99	\$7.9	\$1.7	28%
\$30.00 to \$49.99	\$3.6	-\$1.0	-22%
\$50.00 to \$99.99	\$2.2	-\$0.9	-30%
\$100.00 to \$199.99	\$1.1	\$0.2	23%
\$200.00 +	\$0.6	\$0.2	49%
Total value	\$416	-\$8.4	-2%

At the time of writing, almost all states are in a partial-to-full lockdown, meaning that on-trade outlets such as bars and restaurants have been closed in most cases to everything but takeaway. This has meant that the sales velocity in on-trade outlets declined by 77 per cent in the week ending 28 March 2020, compared to the same week in 2019 (Nielsen/CGA).

A positive in this situation has been that many states are relaxing their alcohol laws, which have historically been very resistant to change. Numerous restaurants have pivoted to takeaway with many states now allowing alcohol with takeaway food orders; 15 per cent of consumers have now ordered alcohol in this manner.

Thankfully off-trade liquor outlets have been classed as 'essential' in nearly every state. According to IRI Worldwide, beverage alcohol sales in grocery and mass merchandisers have grown by 57 per cent in the week ending 21 March 2020. Wine grew by 52 per cent, while beer sales increased by 56 per cent and spirits grew by 72 per cent. Their data also shows that there has been a shift to larger packaging formats (i.e. 3-litre boxes), well-known brands, and less premium offerings. However, this has not reversed the premiumisation trend; rather, the lower end is now also growing, rather than declining, but not as strongly as the premium end.

There are reports that Australian wine is keeping its share amidst this growth in both the off-trade and online. As stockpiling calms down in the USA, it is a waiting game to see how this will affect overall alcohol consumption over the next few months. According to Nielsen/CGA about half of consumers say they are consuming the same amount of alcohol as before, while 22 per cent are drinking more and 27 per cent are drinking less.

Aaron Ridgeway, Wine Australia's Regional General Manager Americas, said 'The trading environment in the USA currently is almost beyond comprehension. As many as 25 million people have lost work in the last month, restaurants remain shuttered or making a fraction of their revenues from take-away and delivery, and further uncertainty is contributed by a federal election in November.

'Retail, especially with online and delivery capability, is doing well, while grocery foot traffic surges mostly to the benefit of national wine brands and large wholesalers. Australian exporters must stay strong, support their importers and wholesalers however possible and be prepared for the significant opportunity that awaits. The market will re-open and demand will be high'.

Commentary (continued)

Canada

Australian wine exports to Canada decreased by 13 per cent in value to \$179 million in the year ended March 2020, the lowest total value since mid-2014. Volume declined at an even greater rate – by 26 per cent to 52 million litres (5.8 million 9-litre case equivalents). This meant that average value climbed by more than 50 cents (or 17 per cent) to \$3.42 per litre FOB.

While both bottled and unpackaged wine drove the decrease in exports, unpackaged wine suffered greater losses. Unpackaged wine exports to Canada decreased by 29 per cent in value to \$33 million, while shipments of wine in glass bottles declined by 7 per cent to \$145 million. The volume decline was heavily skewed towards unpackaged wine shipments.

Although the overall figures present a challenge, premium Australian wine is managing to grow. Exports with an average value above \$10 per litre FOB grew by 2 per cent to \$25 million. The main driver behind this growth is exports with an average value between \$10 and \$19.99 per litre FOB (see Figure 6).

Figure 6: Exports to Canada by price segment (\$ million FOB)

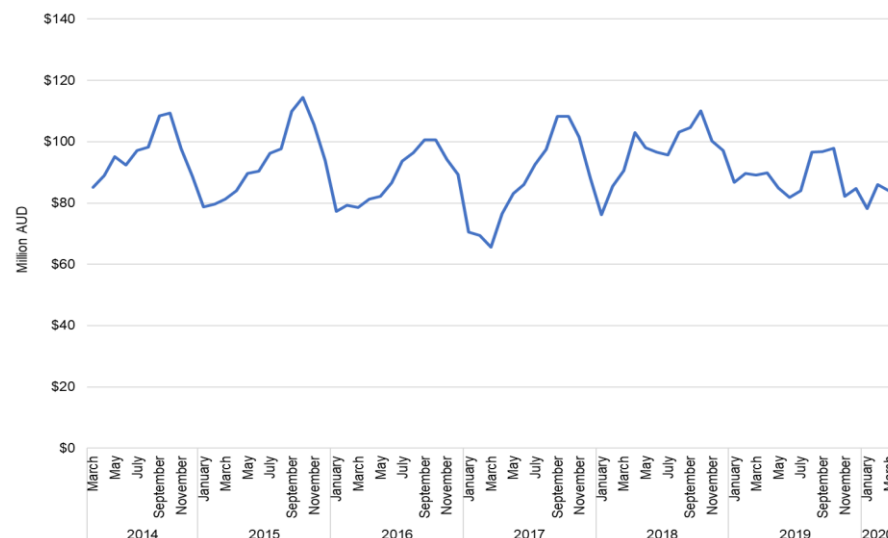
Price segment (A\$/litre)	MAT March 2020	Value change	Growth rate
\$2.49 and under	\$33	-\$14	-30%
\$2.50 to \$4.99	\$37	-\$7.2	-16%
\$5.00 to \$7.49	\$65	-\$5.2	-7%
\$7.50 to \$9.99	\$18	-\$0.1	-1%
\$10.00 to \$14.99	\$20	\$0.3	2%
\$15.00 to \$19.99	\$2.4	\$0.3	17%
\$20.00 to \$29.99	\$1.1	-\$0.1	-10%
\$30.00 to \$49.99	\$1.2	-\$0.03	-2%
\$50.00 to \$99.99	\$0.4	-\$0.1	-18%
\$100.00 to \$199.99	\$0.1	\$0.01	6%
\$200.00 +	\$0.1	-\$0.01	-8%
Total value	\$179	-\$26	-13%

Europe

United Kingdom

In the year ended March 2020, Australian wine exports to the United Kingdom (UK) decreased by 10 per cent in value to \$347 million and 9 per cent in volume to 219 million litres (24.3 million 9-litre case equivalents). Average value declined slightly, by 1 per cent, to \$1.59 per litre. Quarterly performance was slightly better than the year ended figures, with value declining by 6 per cent for the quarter ending March 2020 (see Figure 7).

Figure 7: Rolling quarterly export value to the UK



Commentary (continued)

Unlike other markets, the decline in the UK is heavily weighted towards bottled wine, down by 19 per cent in value to \$139 million and 24 per cent in volume to 32 million litres. Unpackaged wine shipments declined by 3 per cent in value to \$208 million and 6 per cent in volume to 187 million litres. Some 85 per cent of the total volume shipped to the UK is unpackaged and bottled in market. Some of the exports are also then shipped to other European countries.

A bright spot for shipments to the UK is premium wine with an average value above \$30 per litre; these shipments increased by 32 per cent, albeit off a small base (see Figure 8).

Figure 8: Exports to the UK by price segment (\$ million FOB)

Price segment (A\$/litre)	MAT March 2020	Value change	Growth rate
\$2.49 and under	\$199	-\$10	-5%
\$2.50 to \$4.99	\$91	-\$23	-20%
\$5.00 to \$7.49	\$22	-\$4.0	-16%
\$7.50 to \$9.99	\$12	-\$2.2	-15%
\$10.00 to \$14.99	\$10	-\$1.3	-11%
\$15.00 to \$19.99	\$3.3	-\$0.8	-19%
\$20.00 to \$29.99	\$2.9	-\$0.4	-11%
\$30.00 to \$49.99	\$3.4	\$0.5	19%
\$50.00 to \$99.99	\$1.7	\$0.6	54%
\$100.00 to \$199.99	\$0.5	\$0.2	56%
\$200.00 +	\$0.7	\$0.2	48%
Total value	\$347	-\$40	-10%

The UK is also one of the countries worst-affected by COVID-19. The country is currently amid a full-scale lockdown as cases keep surging. On 20 March 2020, all on-trade venues were ordered to close by the government and resulted in sales for the week ending 21 March declining by 71 per cent compared to the same week in 2019 (CGA).

This market also experienced a surge in off-trade sales in the same period. Off-trade sales data from IRI Worldwide, for the week ending 21 March 2020, reported a 48 per cent growth in grocery and non-grocery sales compared with the same week a year ago. This equated to more than £1 billion in additional sales, bringing total sales almost to those the week before Christmas 2019. However, this growth was quickly reversed in the week ending 28 March, where increased restrictions on movement, basket size limitations, and the build-up of stockpiling, meant that sales levels declined to below those in the same week of last year; grocery sales were down 9 per cent while non-grocery sales were down 19 per cent. Wine declined by 4 per cent in value.

Laura Jewell MW, Wine Australia's Regional General Manager EMEA said 'Following the UK's exit from the European Union at the end of January, attention has turned to the transition or negotiation stage which will last for 11 months, to the end of 2020. Finally, there seemed to be some certainty and positivity in the market, helped particularly for wine by the decision in the Chancellor's budget to freeze Excise Duty on wine. Those Brexit negotiations are also affected by the travel restrictions and negotiators being unable to work as usual, and it is likely that an extension to the transition period will be called for.

'Since the closure of the on-trade in March there has been strong support on social media for customers to buy from the independent off-trade, online retailers and those who can do home deliveries. Shipments do not seem to be affected yet, and UK bottlers report no major issues. For retailers the priority is to keep the stores replenished, but in the background, buyers are working as normally as possible on NPD, with the Systembolaget in Sweden publishing their tenders for December and one UK retailer allowing buyers to receive samples at home.

'As with other markets, there are predictions that the landscape will be very different as we come out of lockdown.'

Commentary (continued)

Other European markets of note:

- Germany, down 10 per cent to \$47 million,
- Netherlands, down 5 per cent to \$41 million,
- Denmark, up 48 per cent to \$35 million, and
- Sweden, down 3 per cent to \$23 million.

Asia

Singapore

Singapore continued its strong performance as a growing export destination for Australian wine. In the year ended March 2020, export value grew by 20 per cent to \$103 million, while volume increased by 14 per cent to 7.2 million litres. Average value increased by 5 per cent to a record level of \$14.26 per litre FOB. Of destinations that import at least \$500,000 annually of Australian wine, this ranks Singapore in first place for average value, ahead of Hong Kong. Relatively high taxes on alcohol in Singapore are a contributing factor to the high average value.

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

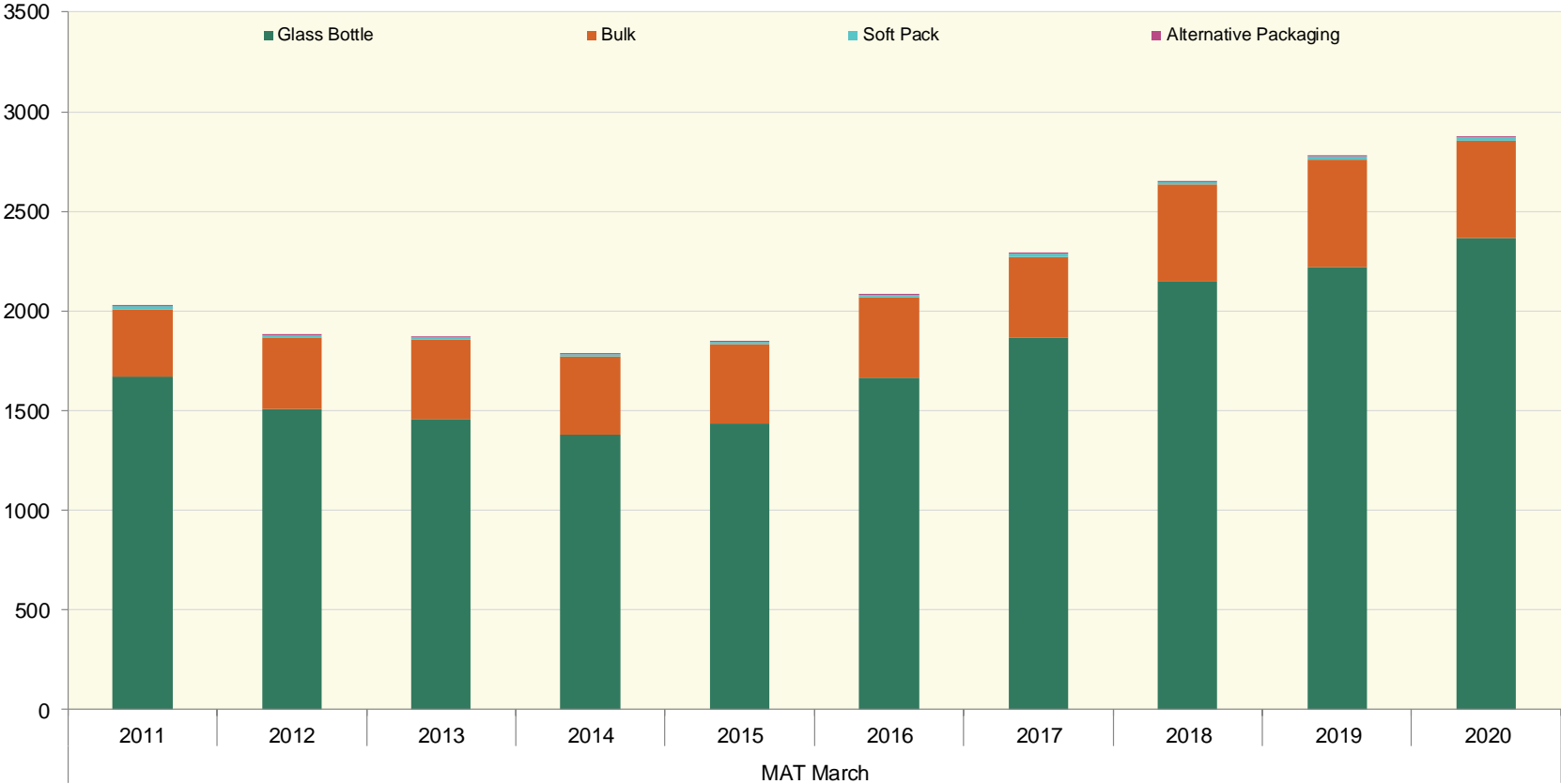
Other Asian markets of note:

- Japan, down by 8 per cent to \$51 million,
- Malaysia, up 23 per cent to \$40 million,
- Thailand, down 23 per cent to \$22 million, and
- South Korea, up 5 per cent to \$20 million.

Historic overview of exports

Value by container type in A\$ million

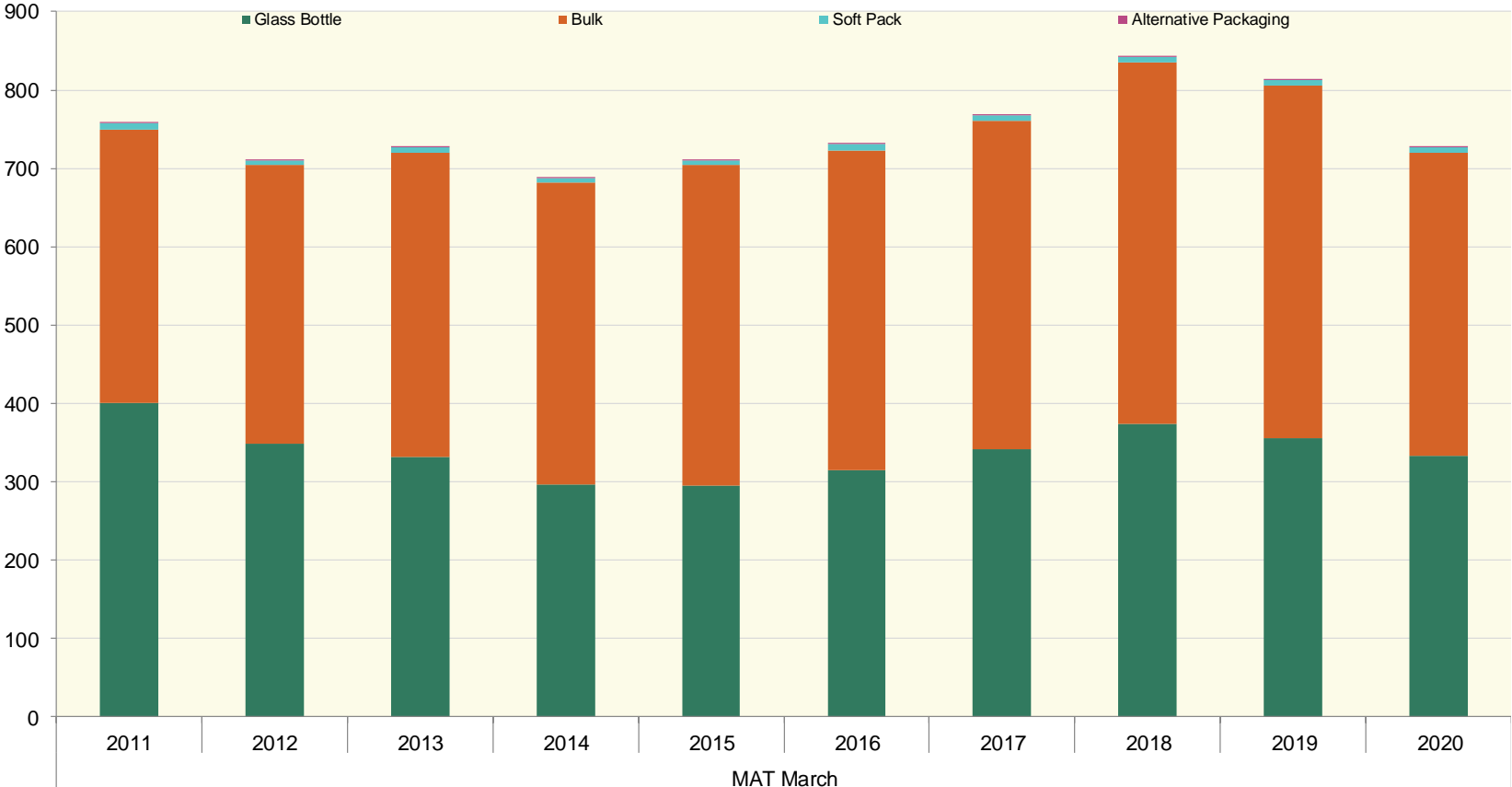
Value (million AUD)



Historic overview of exports

Volume by container type ('000 litres)

Volume (million litres)

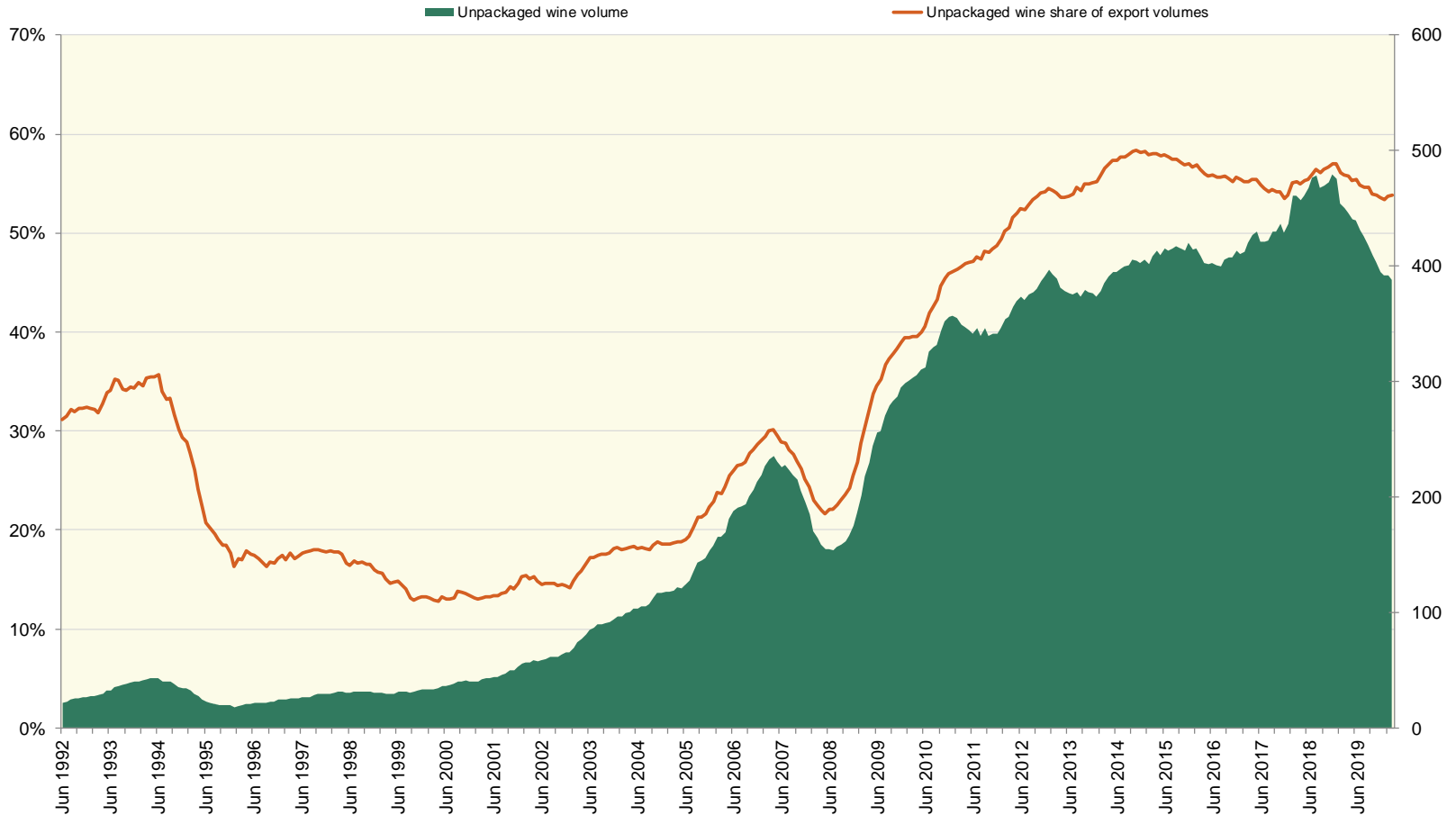


Historic overview of exports

Unpackaged share of export volumes

Unpackaged wine share of export volumes

Unpackaged wine export volume (million litres)



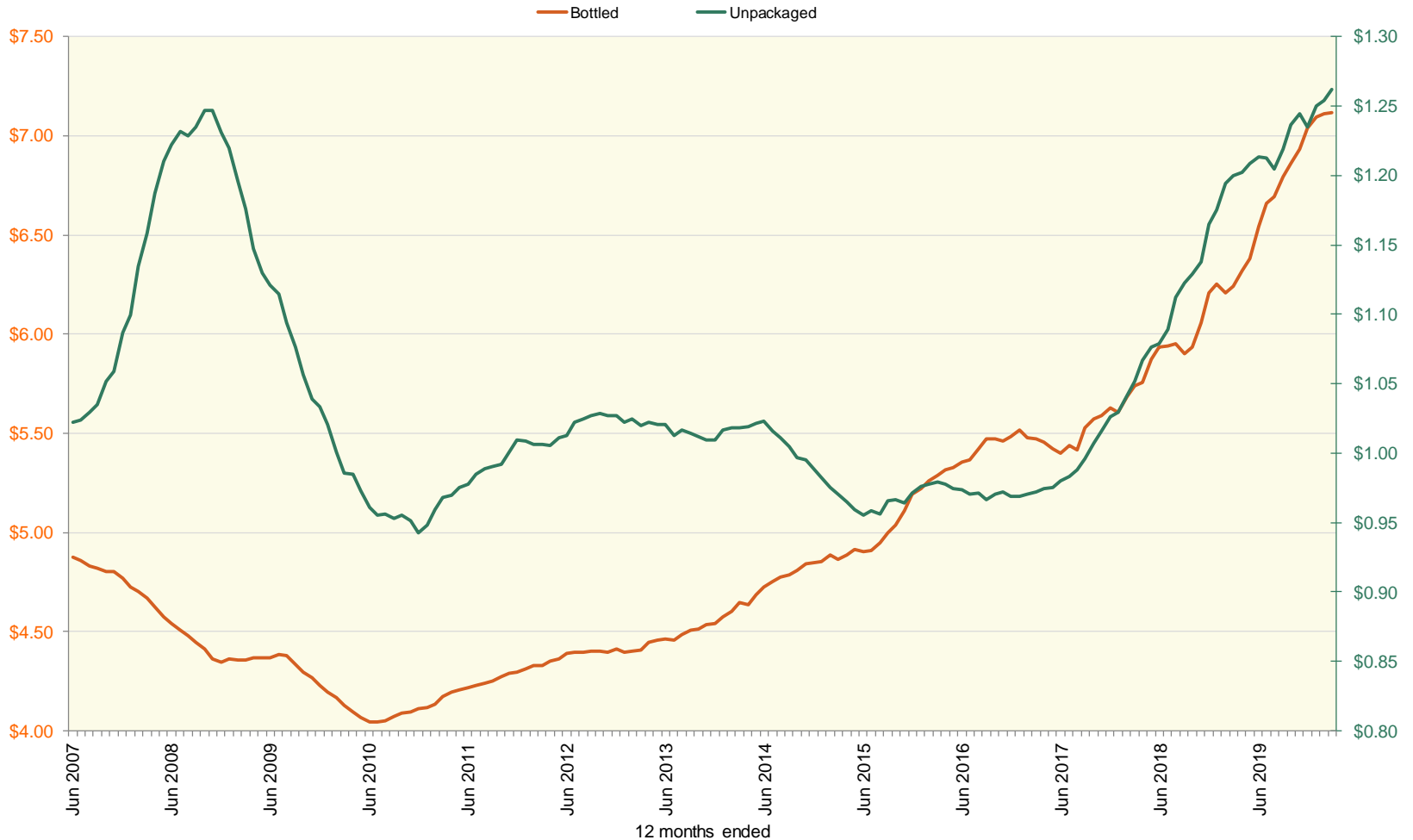
12 months ended

Historic overview of exports

Average value of exports

Bottled average value (AUD per litre)

Unpackaged average value (AUD per litre)

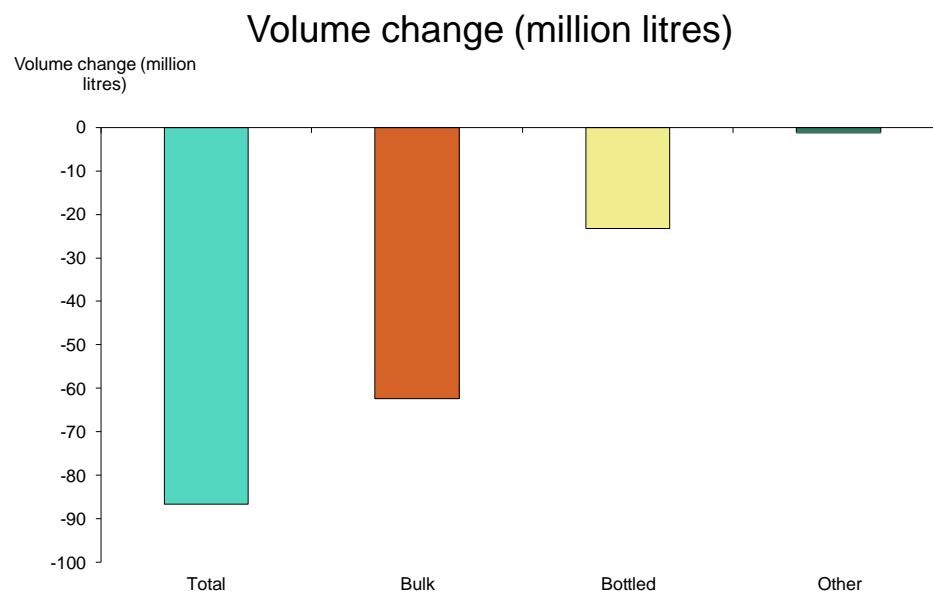
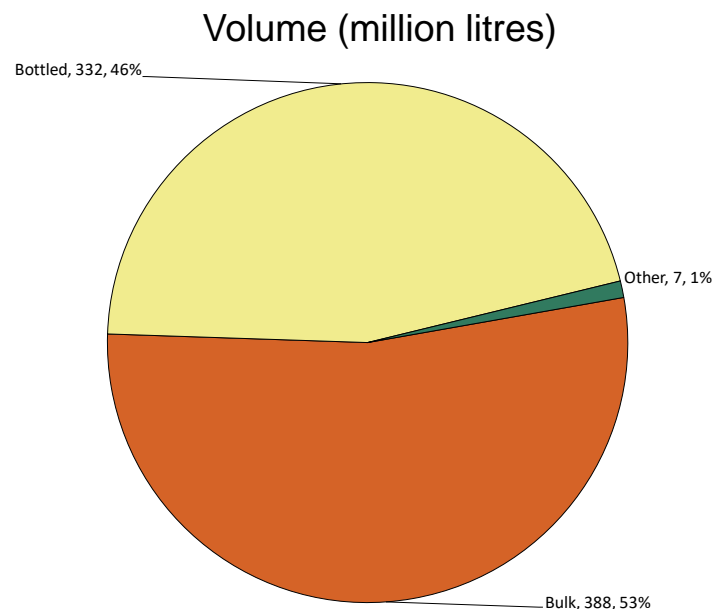


Exports by container type

MAT March 2020

		Volume (ML)	Value (A\$M FOB)	Average Value (A\$/L FOB)
Bottled	2020	332	2,365	7.12
	Change Share	-7% 46%	7% 82%	14%
Bulk	2020	388	490	1.26
	Change Share	-14% 53%	-9% 17%	5%
Other	2020	7	18	2.46
	Change Share	-13% 1%	-12% 1%	2%
Total	2020	728	2,873	3.95
	Change Share	-11% 100%	3% 100%	16%

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



Wine exports

by country, container and colour

Value for MAT March 2020

	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 2020 (A\$ '000s)	Change %	MAT March 2020 (A\$ '000s)	Change %	MAT March 2020 (A\$ '000s)	Change %	MAT March 2020 (A\$ '000s)	Change %	MAT March 2020 (A\$ '000s)	Change %	MAT March 2020 (A\$ '000s)	Change %	MAT March 2020 (A\$ '000s)	Change %	MAT March 2020 (A\$ '000s)	Change %	MAT March 2020 (A\$ '000s)	Change %
China, Pr	1,056,910	19%	50,353	-28%	1,059	33%	27,635	15%	1,481	-49%	109	68%	6,878	14%	5,269	16%	1,149,692	15%
United States Of America	201,212	0%	24,338	-32%	0	na	141,178	3%	45,287	-3%	0	-100%	2,982	-23%	1,013	12%	416,010	-2%
United Kingdom	78,155	-23%	134,275	0%	16	na	56,666	-14%	73,450	-9%	16	na	3,807	-19%	956	-36%	347,341	-10%
Canada	97,612	-7%	13,282	-36%	269	-64%	42,161	-9%	19,359	-23%	669	-59%	3,514	1%	2,164	15%	179,029	-13%
Singapore	89,872	25%	0	na	247	12%	7,541	4%	0	na	98	4%	4,610	-21%	605	10%	102,974	20%
Hong Kong	82,877	-13%	72	10%	1,437	-6%	7,817	-2%	0	na	301	16%	2,301	-3%	600	-33%	95,406	-12%
New Zealand	53,949	0%	12,109	-12%	852	7%	9,980	0%	7,341	-5%	338	-28%	4,994	-1%	4,364	9%	93,927	-2%
Japan	18,307	-16%	4,939	-12%	2,611	9%	11,685	1%	3,103	-3%	1,032	1%	4,790	-1%	4,335	-6%	50,802	-8%
Germany, Federal Republic	9,409	-22%	19,959	0%	0	na	1,854	-45%	15,504	-7%	0	na	80	-51%	9	18%	46,815	-10%
Netherlands	15,750	7%	3,756	-19%	0	na	14,600	-9%	5,782	-12%	0	na	1,052	1%	43	-39%	40,983	-5%
Malaysia	36,036	24%	0	na	89	-26%	3,043	18%	0	na	11	43%	160	-25%	225	29%	39,563	23%
Denmark	8,495	1%	15,603	++	0	na	3,669	4%	6,334	99%	0	na	425	-41%	135	-13%	34,660	48%
United Arab Emirates	22,302	4%	0	na	738	13%	5,338	-17%	0	na	499	11%	679	-25%	573	-13%	30,129	-1%
Sweden	13,810	4%	1,792	-27%	0	na	5,129	-7%	1,041	-29%	0	na	1,205	-7%	319	++	23,296	-3%
Thailand	15,602	-9%	215	-87%	566	-65%	3,687	-20%	126	-82%	223	-73%	1,107	-10%	121	-50%	21,647	-23%
Korea, R	15,573	5%	0	na	1,265	16%	2,716	4%	0	na	118	++	499	-11%	96	-10%	20,268	5%
Taiwan	17,124	-2%	0	na	487	57%	1,470	4%	0	na	167	40%	187	87%	234	-16%	19,669	0%
Belgium	4,799	36%	3,550	-7%	0	na	2,916	-6%	5,664	9%	0	na	416	13%	198	32%	17,543	9%
Philippines	11,163	53%	0	na	1	na	2,489	26%	0	na	1	na	44	29%	89	51%	13,787	48%
Indonesia	11,463	++	0	na	6	-46%	1,845	56%	0	na	0	-100%	265	++	199	-24%	13,779	++
Rest of the world	61,842	-2%	13,017	10%	1,533	-14%	26,260	5%	7,505	-16%	912	-26%	2,951	-7%	2,096	-5%	116,117	-1%
World	1,922,264	9%	297,259	-10%	11,177	-7%	379,679	-2%	191,976	-8%	4,494	-28%	42,945	-7%	23,642	1%	2,873,437	3%

Wine exports

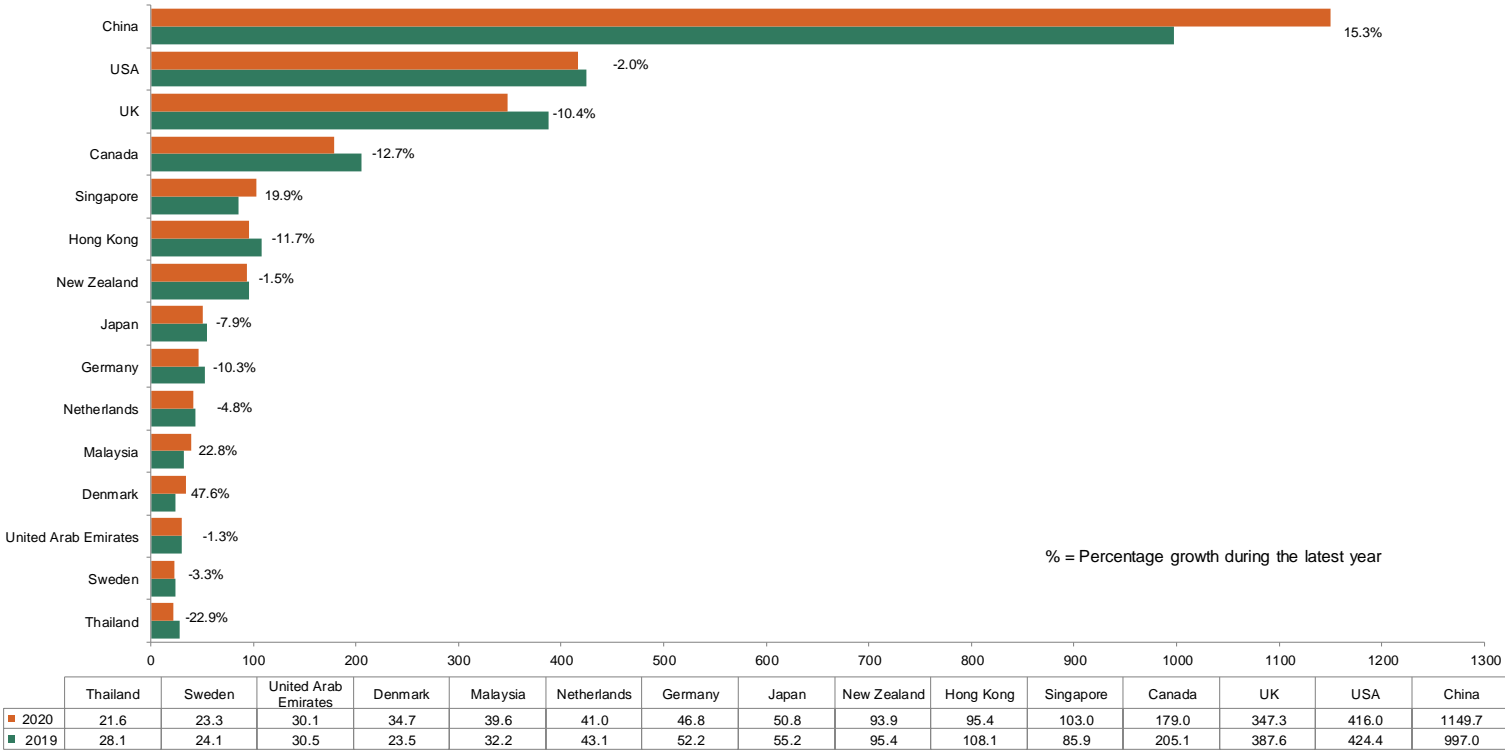
by country, container and colour

Volume for MAT March 2020

	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 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %
United Kingdom	15,514	-29%	110,216	-5%	3	na	15,326	-17%	76,697	-9%	3	na	715	-27%	210	-17%	218,684	-9%
United States Of America	42,327	-7%	14,448	-38%	0	na	36,474	-1%	42,107	-10%	0	-100%	470	-34%	125	-4%	135,950	-11%
China, Pr	104,411	-3%	18,392	-41%	340	46%	4,292	14%	936	-43%	35	45%	641	28%	701	18%	129,747	-11%
Canada	15,102	-12%	9,857	-44%	74	-59%	8,443	-13%	17,709	-27%	186	-53%	562	-4%	379	8%	52,313	-26%
Germany, Federal Republic	1,692	-38%	12,817	-11%	0	na	344	-52%	14,886	-14%	0	na	8	-37%	1	56%	29,748	-15%
New Zealand	10,368	0%	6,630	-20%	390	8%	3,137	0%	7,693	-14%	156	-23%	953	1%	853	11%	30,178	-8%
Netherlands	3,646	-6%	2,596	-26%	0	na	3,944	-12%	5,467	-18%	0	na	206	-13%	4	-63%	15,863	-16%
Japan	3,257	-10%	3,807	-13%	1,324	-1%	2,094	2%	2,871	-9%	644	11%	940	-8%	791	-15%	15,727	-8%
Denmark	1,110	-15%	10,236	77%	0	na	739	-15%	5,932	79%	0	na	96	-41%	9	-39%	18,123	58%
Belgium	637	33%	2,674	-12%	0	na	547	-1%	5,542	-2%	0	na	62	1%	34	++	9,495	-3%
Hong Kong	5,196	-9%	47	-1%	508	-8%	894	-13%	0	na	113	7%	129	-8%	59	-22%	6,946	-10%
Singapore	5,500	21%	0	na	131	11%	919	0%	0	na	46	-5%	553	-14%	71	12%	7,220	14%
Sweden	2,507	-5%	945	-32%	0	na	1,259	-20%	506	-34%	0	na	304	-13%	62	++	5,583	-17%
France	103	-45%	3,893	42%	0	-100%	48	-21%	3,275	74%	11	++	0	-59%	0	-62%	7,331	50%
Finland	546	-23%	1,961	-22%	0	na	389	-17%	1,995	-25%	0	na	21	-39%	115	56%	5,026	-22%
Thailand	2,106	-8%	144	-88%	262	-68%	781	-21%	120	-83%	101	-76%	176	2%	23	-57%	3,712	-45%
United Arab Emirates	1,838	-7%	0	na	431	13%	989	-11%	0	na	309	1%	97	-22%	151	-15%	3,814	-6%
Malaysia	2,434	-4%	0	na	50	-22%	499	6%	0	na	6	++	21	-37%	40	38%	3,050	-3%
Korea, R	1,984	-2%	0	na	571	11%	423	1%	0	na	46	++	65	-21%	10	-33%	3,098	1%
Ireland	1,140	-8%	259	++	0	na	1,161	-7%	337	++	0	na	19	-32%	3	-37%	2,920	9%
Rest of the world	12,789	8%	1,824	-13%	877	-2%	5,406	11%	973	-80%	442	-29%	498	-1%	424	-19%	23,234	-12%
World	234,206	-7%	200,746	-15%	4,961	-9%	88,106	-6%	187,046	-12%	2,099	-23%	6,535	-11%	4,065	-1%	727,764	-11%

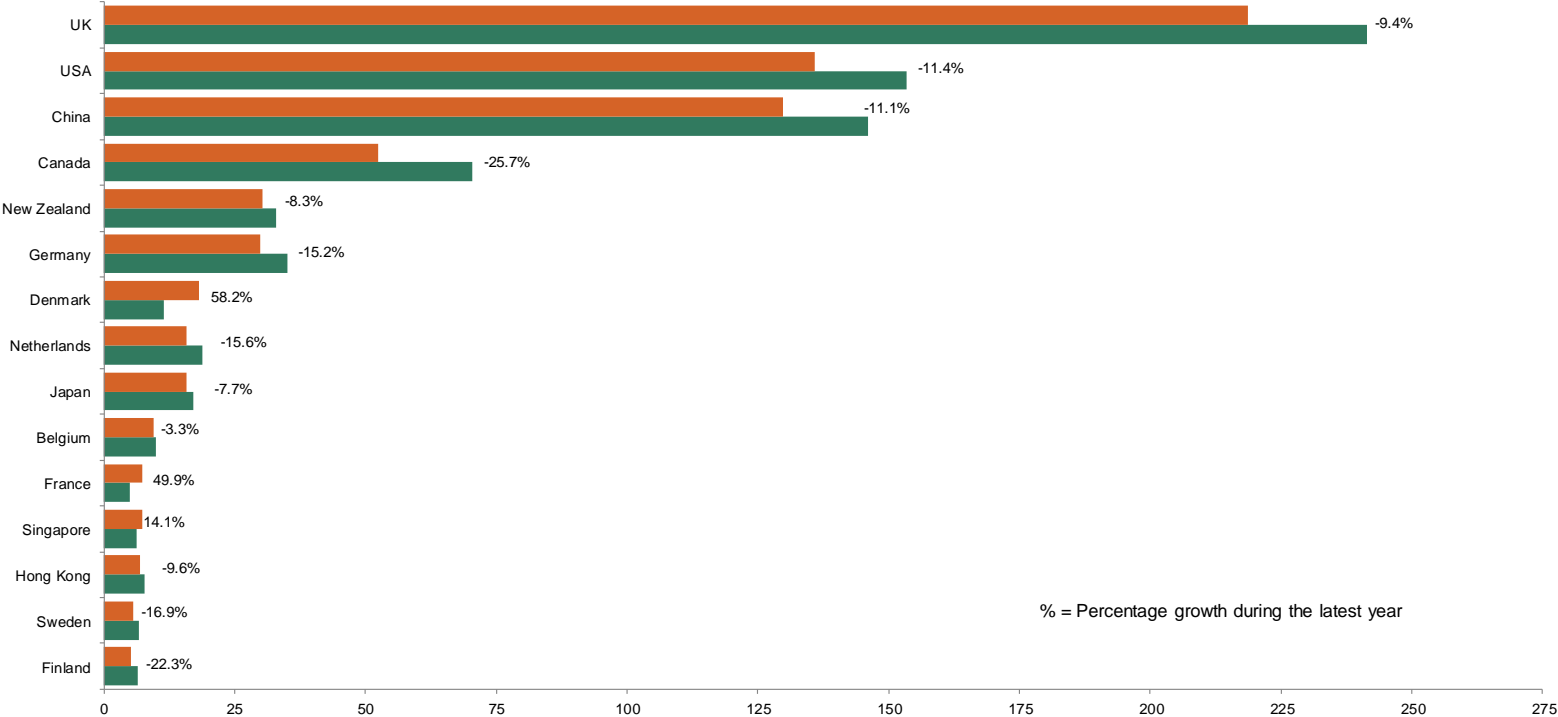
Exports by top 15 destinations

Value (million A\$) for MAT March 2020



Exports by top 15 destinations

Volume (million litres) for MAT March 2020

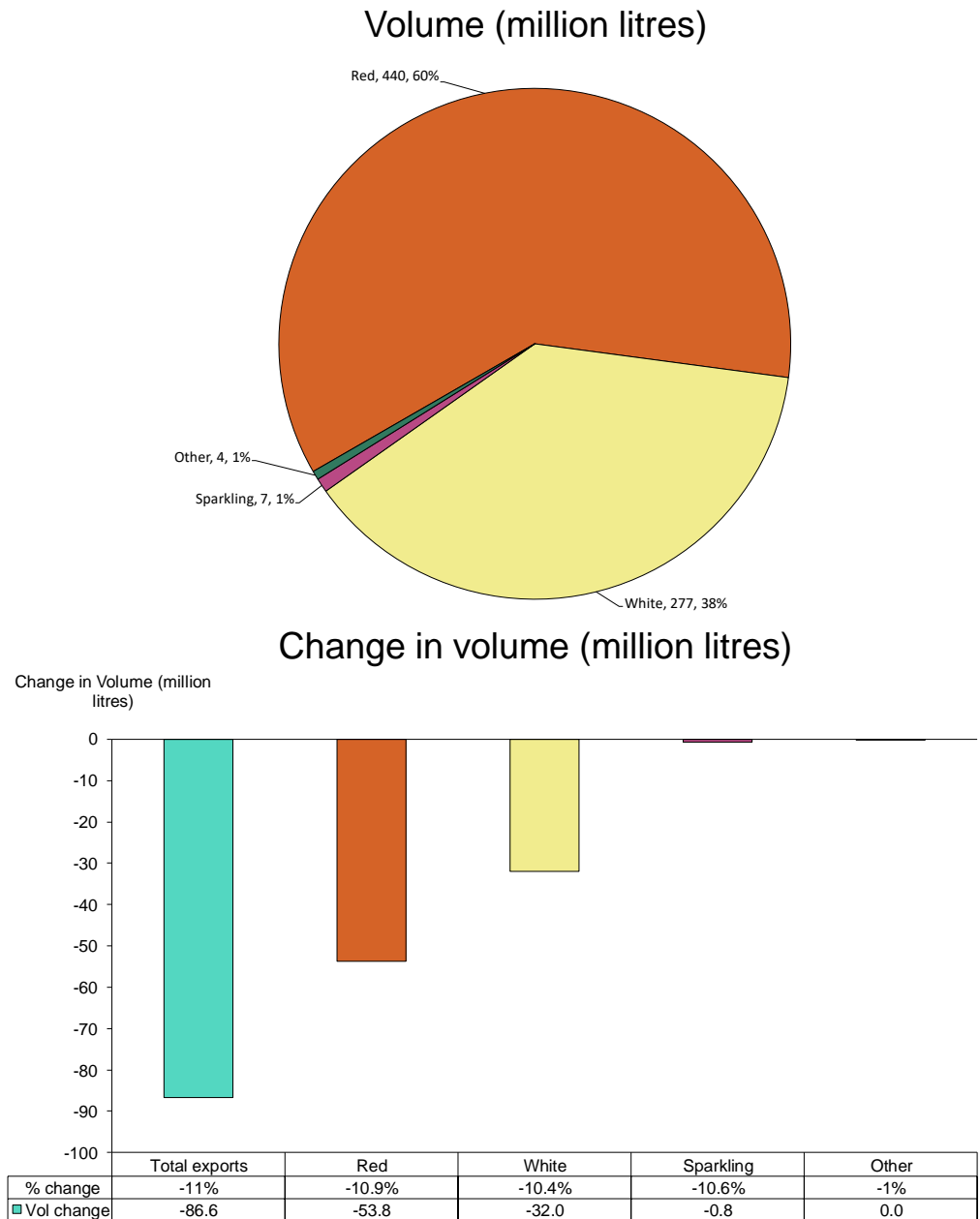


% = Percentage growth during the latest year

	Finland	Sweden	Hong Kong	Singapore	France	Belgium	Japan	Netherlands	Denmark	Germany	New Zealand	Canada	China	USA	UK
2020	5.0	5.6	6.9	7.2	7.3	9.5	15.7	15.9	18.1	29.7	30.2	52.3	129.7	136.0	218.7
2019	6.5	6.7	7.7	6.3	4.9	9.8	17.0	18.8	11.5	35.1	32.9	70.4	146.0	153.4	241.5

Exports by colour/ wine style

MAT March 2020



Bottled wine exports report

Bottled exports by price point and destination	24
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Bottled exports by price point	40

Bottled exports by price point and destination

Value ('000 A\$) for MAT March 2020

	\$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 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %
China	3,024	-52%	189,647	-9%	158,207	15%	56,504	5%	183,700	11%	236,642	9%	268,809	102%	1,096,534	19%
USA	5,153	-45%	259,038	3%	22,429	2%	14,773	-21%	29,570	15%	11,554	7%	3,868	-12%	346,385	1%
UK	1,790	-59%	80,881	-23%	21,553	-15%	12,302	-15%	13,680	-13%	6,284	3%	2,925	53%	139,415	-19%
Canada	16	-98%	36,874	-16%	65,080	-7%	18,182	1%	22,235	3%	2,375	-6%	665	-13%	145,426	-7%
New Zealand	835	-56%	36,998	7%	18,860	-3%	9,323	15%	5,101	-10%	1,138	-25%	1,025	-26%	73,278	1%
Netherlands	368	-84%	19,818	-5%	8,226	39%	1,282	2%	1,242	25%	364	22%	146	-12%	31,445	-1%
Singapore	101	-70%	8,837	29%	7,255	35%	7,892	4%	13,737	-5%	33,464	23%	31,329	33%	102,616	20%
Japan	312	-46%	17,614	-8%	5,458	18%	4,943	38%	5,777	-1%	2,000	-23%	511	-88%	36,615	-10%
Hong Kong	14	-71%	9,166	-10%	7,439	-12%	3,390	-22%	20,791	17%	15,430	-31%	37,367	-13%	93,596	-12%
Sweden	189	-75%	10,372	-11%	3,949	36%	2,943	-2%	2,507	106%	410	-16%	93	-28%	20,463	1%
Thailand	117	-78%	7,697	0%	2,447	-21%	1,827	-19%	1,897	-26%	3,234	-33%	3,299	43%	20,517	-12%
United Arab Emirates	11	-51%	6,212	-1%	3,363	-38%	2,600	4%	3,616	23%	5,197	-8%	7,729	18%	28,729	-2%
Malaysia	30	-70%	4,824	5%	3,082	-38%	1,435	-15%	4,211	16%	14,200	46%	11,681	58%	39,464	23%
Philippines	24	-49%	8,460	38%	1,649	52%	654	160%	649	102%	1,043	117%	1,303	30%	13,783	48%
Korea, R	10	211%	3,924	18%	4,647	-23%	2,014	1%	4,357	-1%	2,405	42%	1,525	130%	18,882	4%
Ireland	551	-70%	5,802	37%	1,045	-17%	377	-20%	694	-24%	185	-15%	36	21%	8,688	-3%
Germany	620	-79%	3,460	-19%	2,983	6%	1,011	-29%	2,184	-21%	715	-18%	378	-28%	11,352	-27%
Taiwan	28	1%	4,854	16%	1,874	8%	1,042	17%	2,260	-11%	4,128	-10%	4,829	-10%	19,015	-1%
Denmark	472	-38%	3,142	-17%	1,287	-48%	1,631	-4%	3,884	50%	1,767	38%	541	100%	12,724	-1%
India	42	167%	6,569	0%	302	-30%	57	15%	155	-59%	42	-76%	0	-100%	7,168	-9%
Other	919	-27%	30,521	8%	20,976	3%	10,074	-1%	16,599	-3%	9,606	34%	10,588	102%	99,283	11%
Total	14,626	-58%	754,710	-5%	362,111	3%	154,256	-1%	338,844	8%	352,183	7%	388,647	60%	2,365,377	7%

Bottled exports by price point and destination

Volume ('000 litres) for MAT March 2020

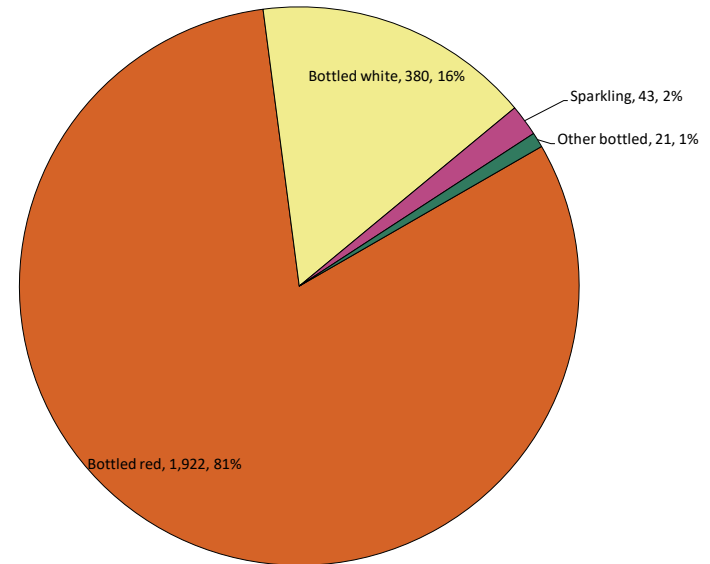
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10.00 to \$19.99		\$20.00 to \$49.99		\$50.00 and above		Total	
	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %
China	1,386	-53%	49,763	-13%	26,867	15%	6,483	4%	14,223	7%	8,274	1%	3,018	98%	110,014	-2%
USA	2,128	-46%	69,010	-3%	3,853	2%	1,602	-27%	2,337	19%	424	7%	41	-28%	79,396	-5%
UK	771	-59%	24,445	-24%	3,667	-14%	1,421	-15%	1,098	-13%	215	1%	31	44%	31,648	-24%
Canada	11	-97%	9,839	-17%	10,551	-9%	2,138	2%	1,852	0%	82	-7%	8	-12%	24,481	-12%
New Zealand	362	-56%	10,253	7%	3,127	-3%	1,087	15%	421	-11%	43	-24%	17	-24%	15,308	1%
Netherlands	152	-84%	6,038	-6%	1,345	34%	152	1%	100	30%	12	5%	2	11%	7,801	-9%
Singapore	50	-70%	2,065	20%	1,234	39%	946	8%	1,075	-5%	1,281	17%	390	35%	7,040	14%
Japan	134	-48%	4,573	-13%	931	21%	574	39%	447	0%	74	-18%	6	-89%	6,740	-8%
Hong Kong	7	-83%	2,227	-12%	1,187	-13%	397	-21%	1,630	19%	551	-30%	281	-20%	6,278	-10%
Sweden	79	-75%	2,814	-15%	689	47%	328	-2%	206	134%	14	-15%	1	-13%	4,132	-9%
Thailand	54	-75%	2,090	0%	408	-17%	218	-18%	151	-31%	128	-36%	37	42%	3,086	-12%
United Arab Emirates	6	-41%	1,572	0%	567	-39%	299	1%	304	27%	191	-7%	77	0%	3,018	-9%
Malaysia	13	-71%	1,240	2%	514	-40%	161	-16%	345	20%	574	43%	146	80%	2,994	-3%
Philippines	11	-44%	2,153	35%	291	53%	74	151%	52	109%	38	119%	16	25%	2,636	40%
Korea, R	6	316%	1,069	23%	781	-26%	227	-2%	304	-5%	79	44%	14	94%	2,481	-2%
Ireland	232	-72%	1,799	36%	181	-17%	45	-18%	60	-26%	6	-18%	0	40%	2,323	-8%
Germany	286	-79%	973	-21%	459	-5%	117	-30%	180	-10%	24	-19%	4	-18%	2,044	-41%
Taiwan	14	6%	1,159	14%	308	3%	124	16%	168	-9%	140	-16%	50	-13%	1,962	6%
Denmark	224	-43%	976	-14%	206	-49%	181	-7%	306	56%	55	27%	7	116%	1,955	-17%
India	20	149%	1,571	-13%	53	-32%	6	7%	14	-58%	2	-73%	0	-100%	1,665	-14%
Other	454	-20%	8,267	7%	3,656	5%	1,172	0%	1,305	-4%	347	32%	126	112%	15,327	4%
Total	6,401	-58%	203,896	-9%	60,875	3%	17,753	-2%	26,578	6%	12,555	2%	4,273	60%	332,330	-7%

Bottled exports by colour/wine style

Value

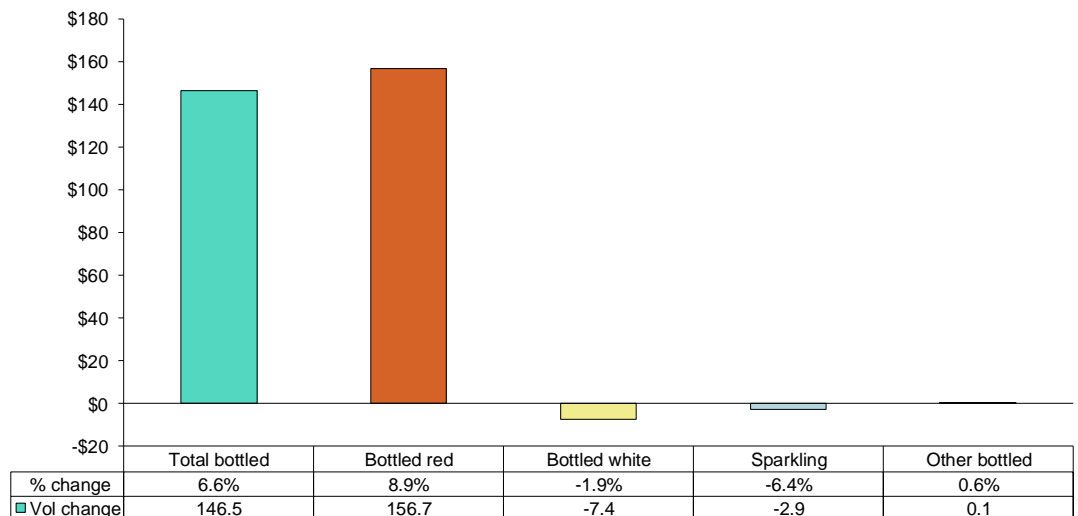
MAT March 2020

Value (A\$ million)



Change in value (A\$ million)

Change in Value (million AUD)



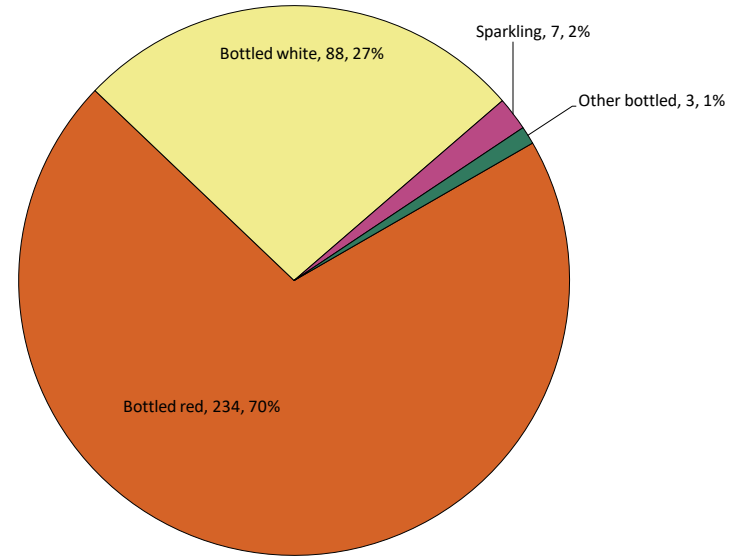
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	6.6%	8.9%	-1.9%	-6.4%	0.6%
Vol change	146.5	156.7	-7.4	-2.9	0.1

Bottled exports by colour/wine style

Volume

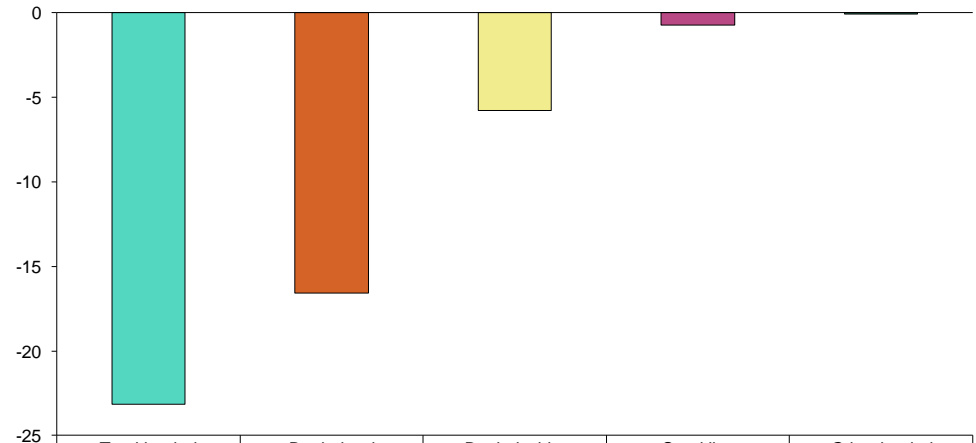
MAT March 2020

Volume (million litres)



Change in volume (million litres)

Change in Volume (million litres)



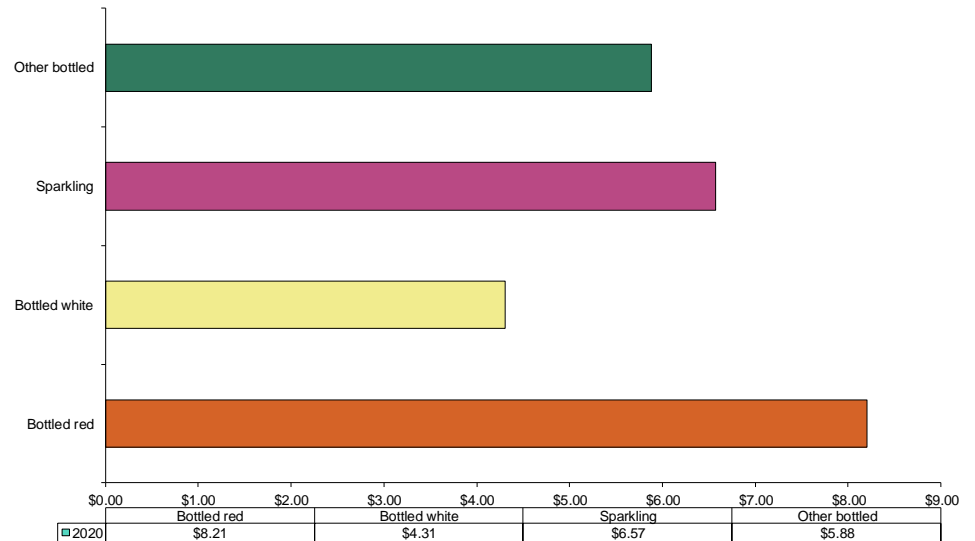
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	-6.5%	-6.6%	-6.2%	-10.2%	-1.4%
Vol change	-23.2	-16.6	-5.8	-0.7	0.0

Bottled exports by colour/wine style

Average value

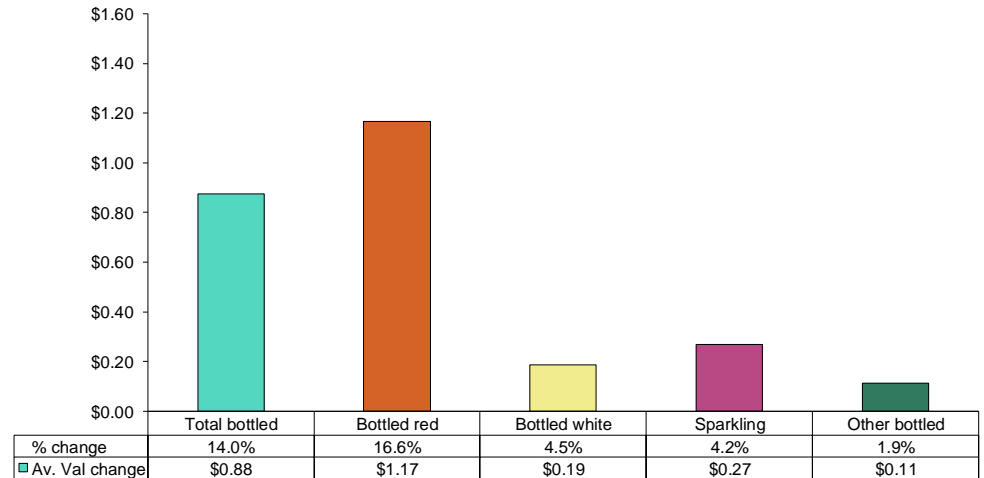
MAT March 2020

Average value (A\$ per litre)



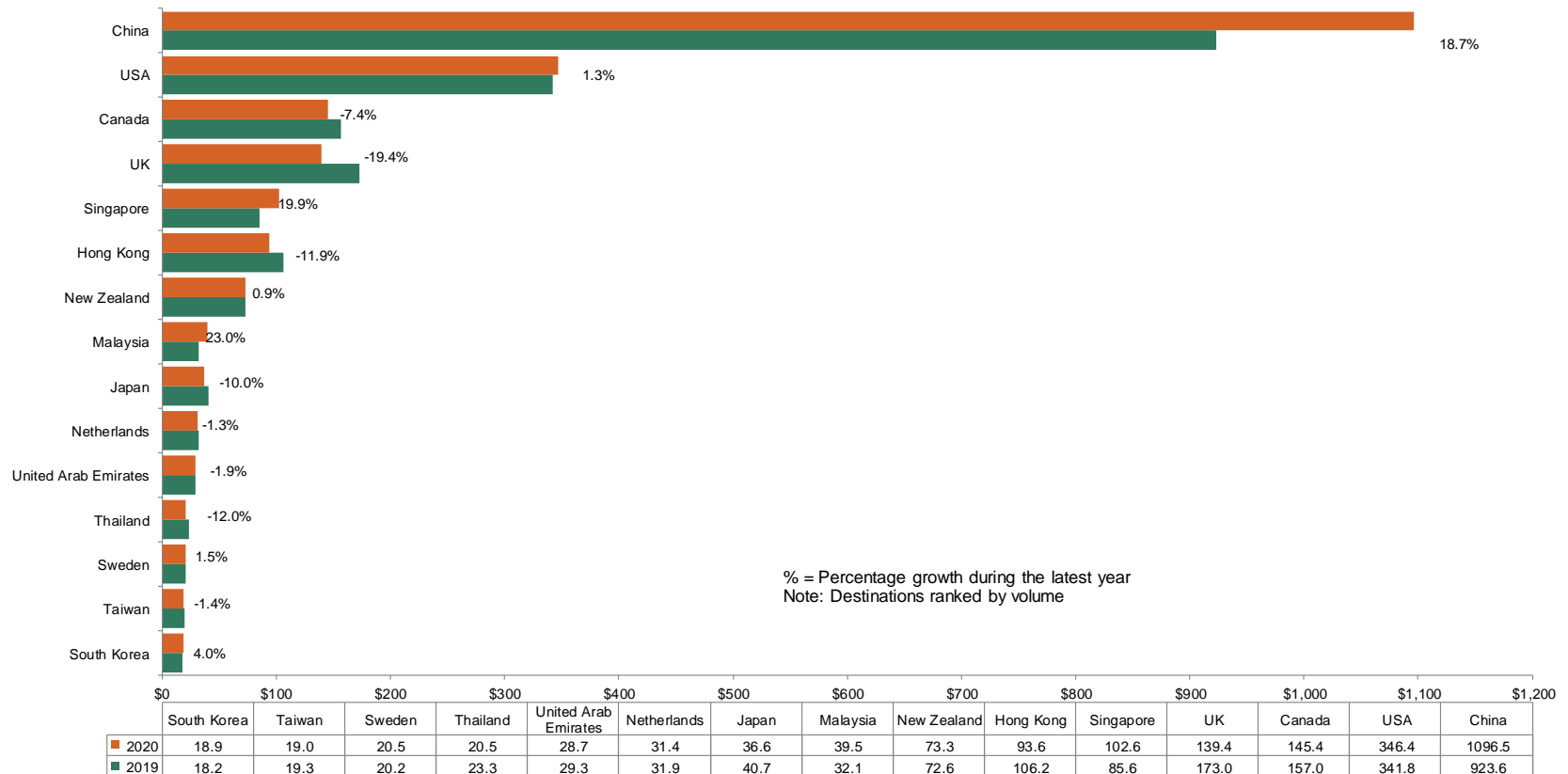
Change in average value (A\$ per litre)

Change in Average Value (AUD/litre)



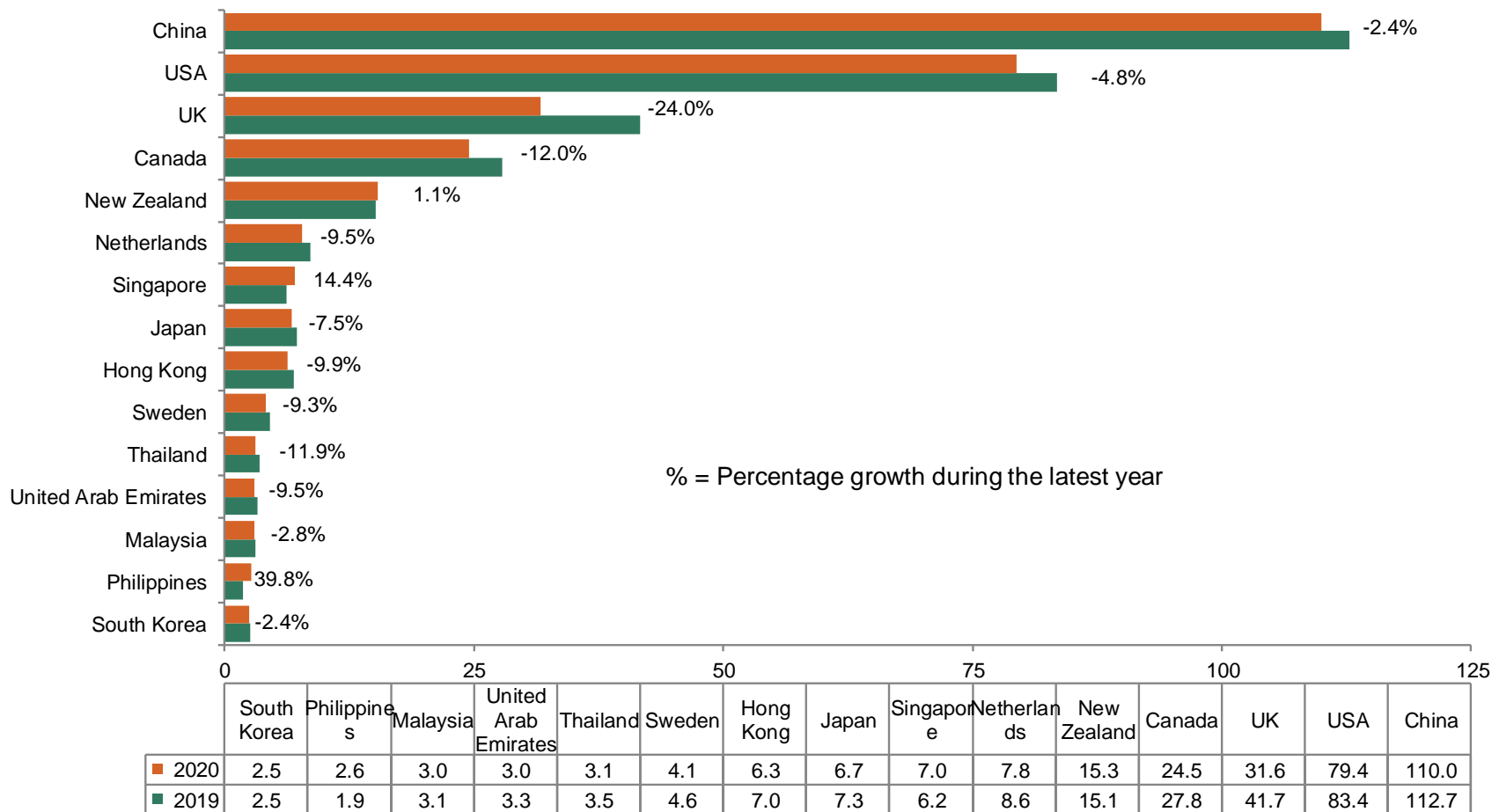
Bottled exports by top 15 destinations

Value (million A\$) for MAT March 2020



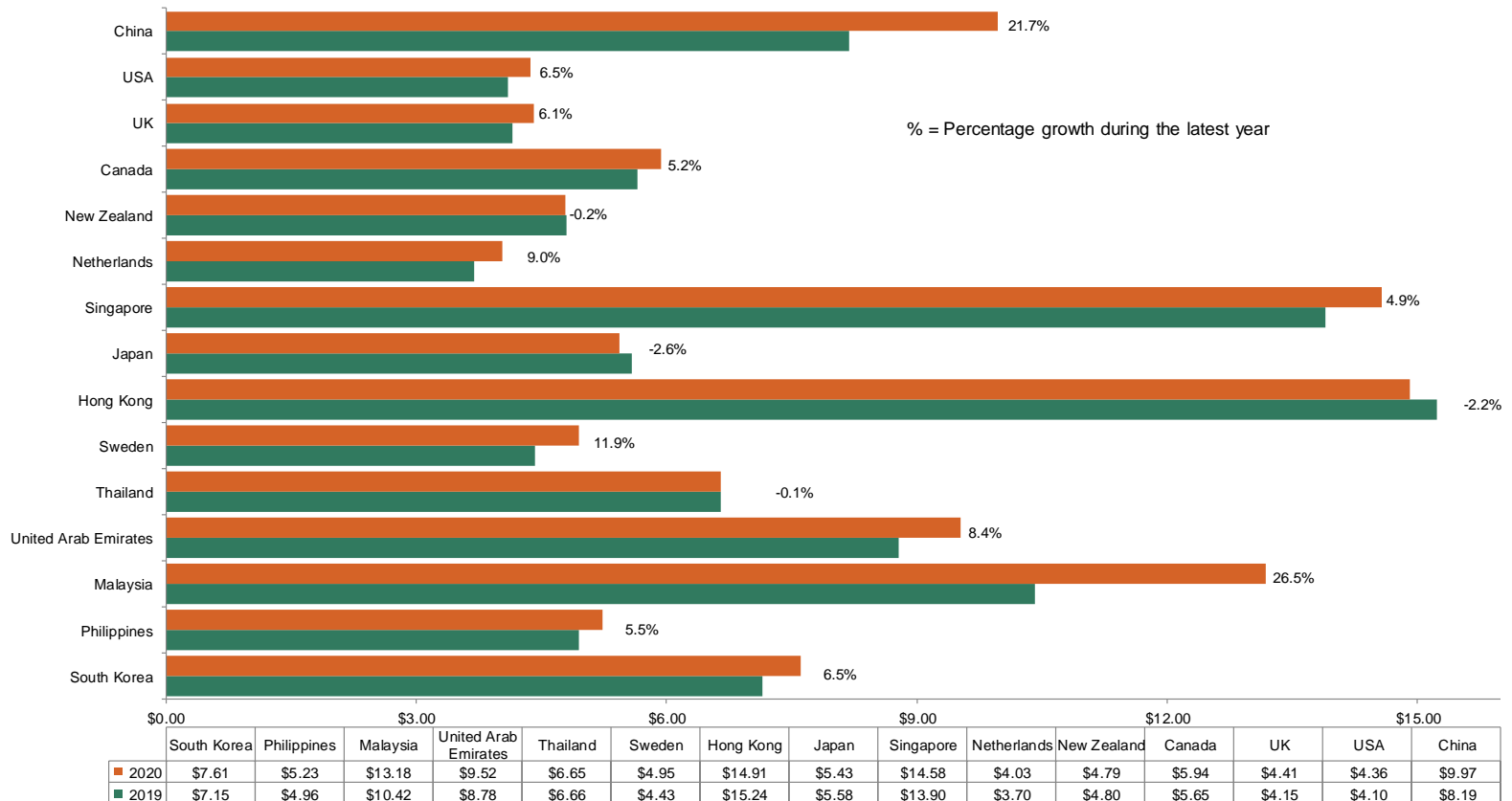
Bottled exports by top 15 destinations

Volume (million litres) for MAT March 2020



Bottled exports by top 15 destinations

Average value (A\$ per litre) for MAT March 2020



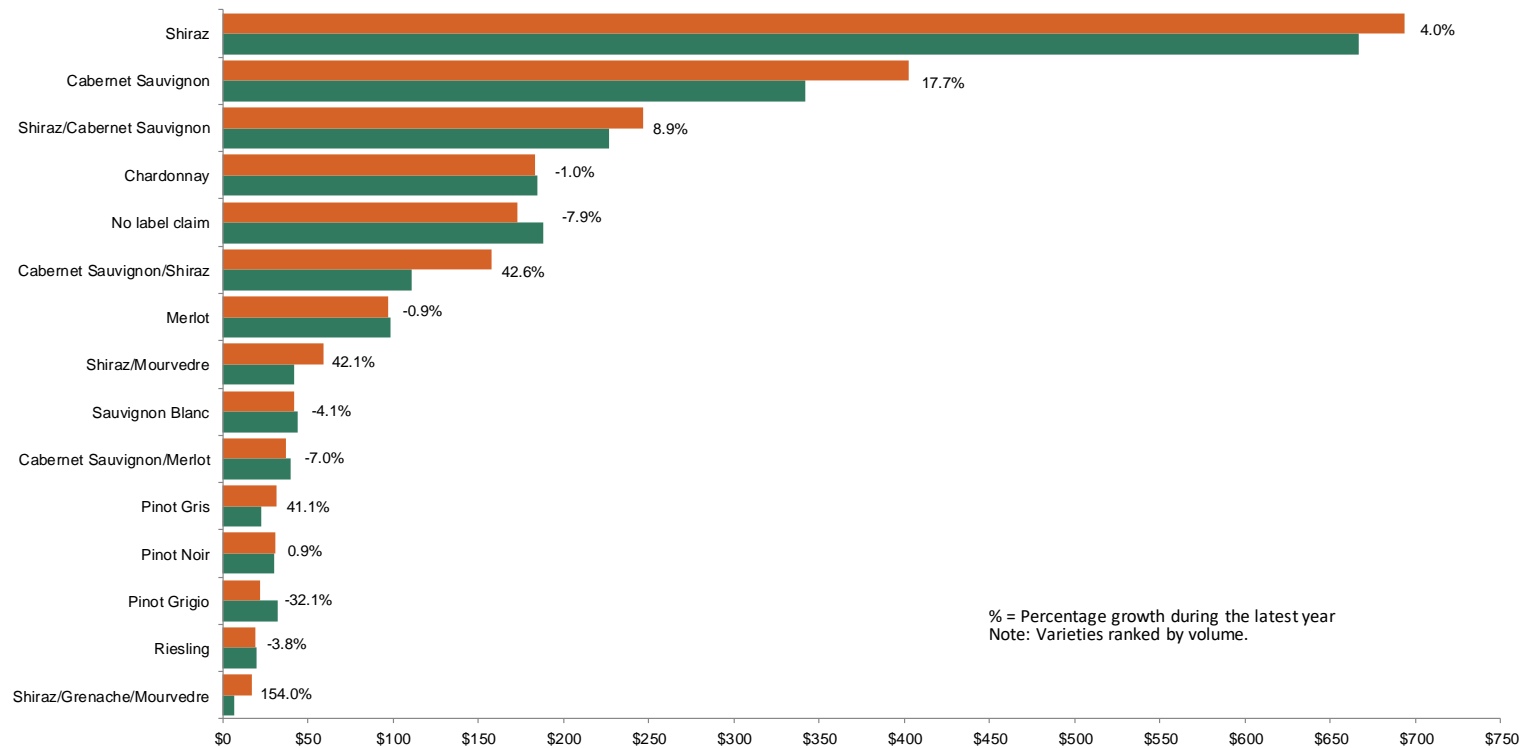
Bottled exports by top 15 variety label claims

MAT March 2020

Top 15 variety label claims	Volume (million litres)		Value (A\$ million FOB)		Average value (\$A per litre FOB)	
	2020	Change	2020	Change	2020	Change
Shiraz	80.08	-9%	693.46	4%	8.66	14%
Cabernet Sauvignon	49.30	-3%	402.83	18%	8.17	22%
Chardonnay	43.41	-6%	183.05	-1%	4.22	7%
No label claim	34.40	-10%	172.87	-8%	5.02	5%
Shiraz/Cabernet Sauvignon	32.02	2%	246.72	9%	7.71	3%
Merlot	21.69	-11%	97.32	-1%	4.49	29%
Sauvignon Blanc	11.27	-8%	42.04	-4%	3.73	11%
Pinot Gris	8.47	29%	31.80	41%	3.76	6%
Cabernet Sauvignon/Merlot	7.42	-12%	36.82	-7%	4.96	5%
Cabernet Sauvignon/Shiraz	5.79	10%	157.89	43%	27.25	6%
Pinot Grigio	5.62	-28%	22.06	-32%	3.92	9%
Pinot Noir	4.53	-7%	30.68	1%	6.78	9%
Riesling	3.03	-9%	19.22	-4%	6.34	-5%
Shiraz/Mourvedre	2.55	34%	59.02	42%	23.11	6%
Chardonnay/Pinot Noir	2.54	-13%	14.18	-10%	5.58	75%

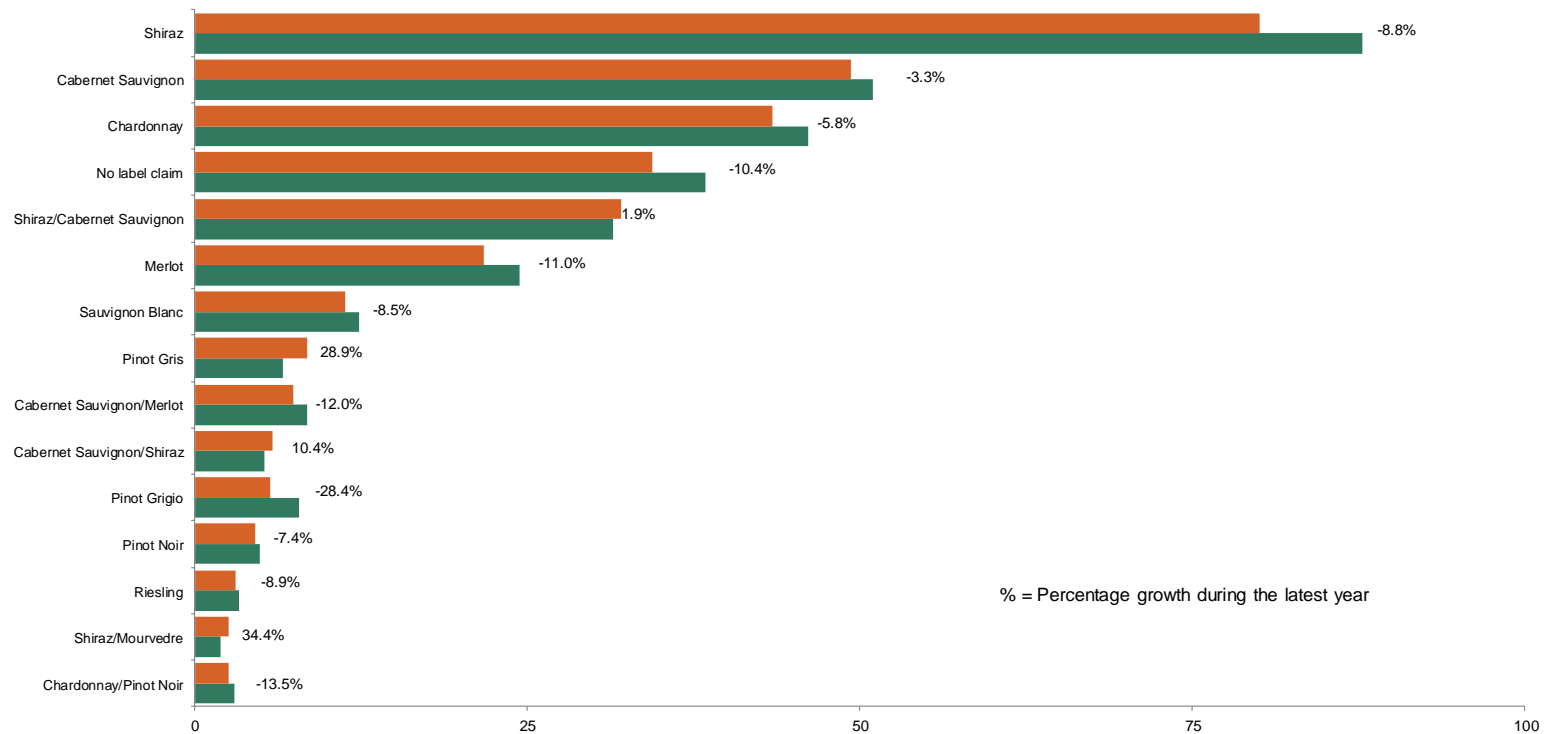
Bottled exports by top 15 variety label claims

Value (million A\$) for MAT March 2020



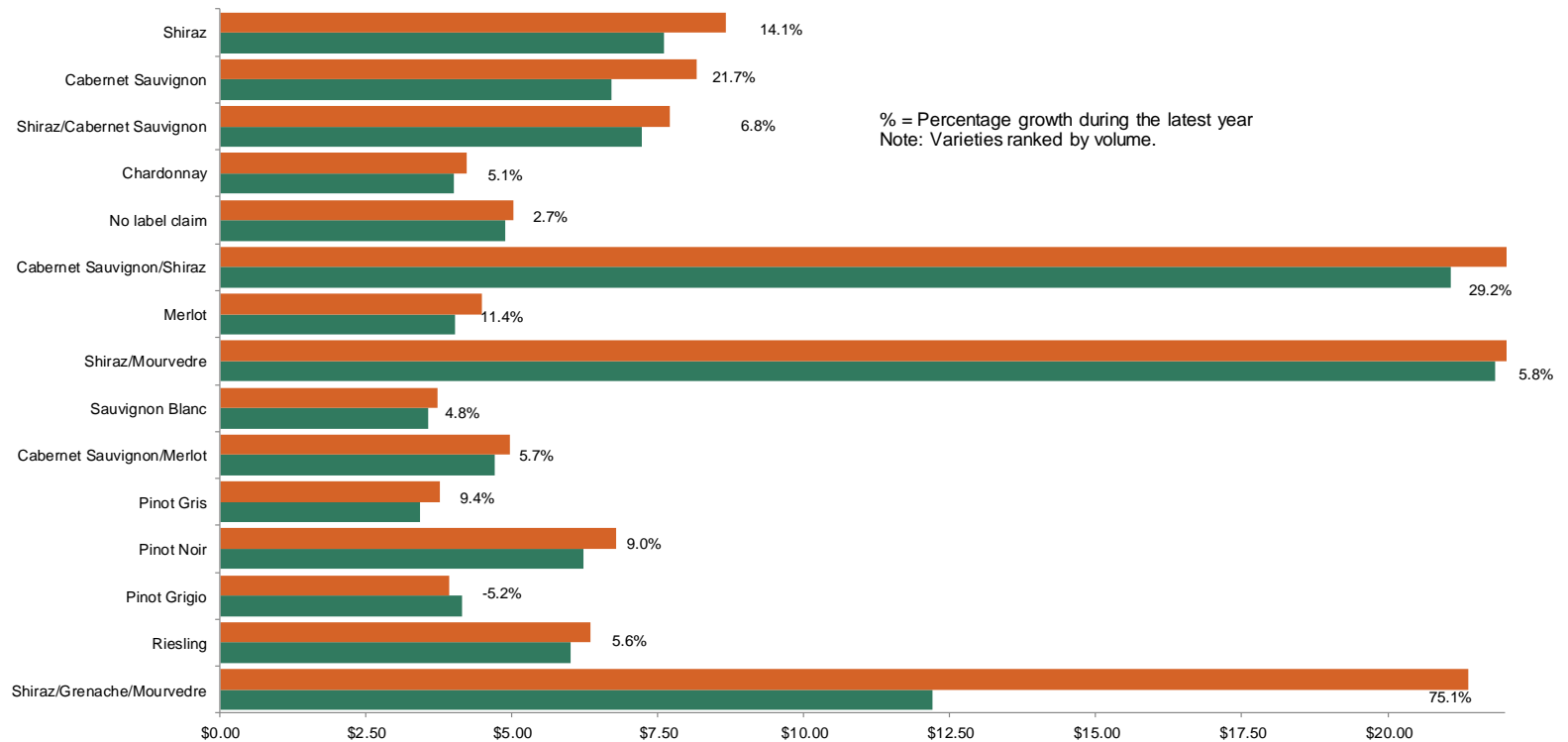
Bottled exports by top 15 variety label claims

Volume (million litres) for MAT March 2020



Bottled exports by top 15 variety label claims

Average Value (A\$ per litre) for MAT March 2020



Bottled exports by top 15 GI region label claims

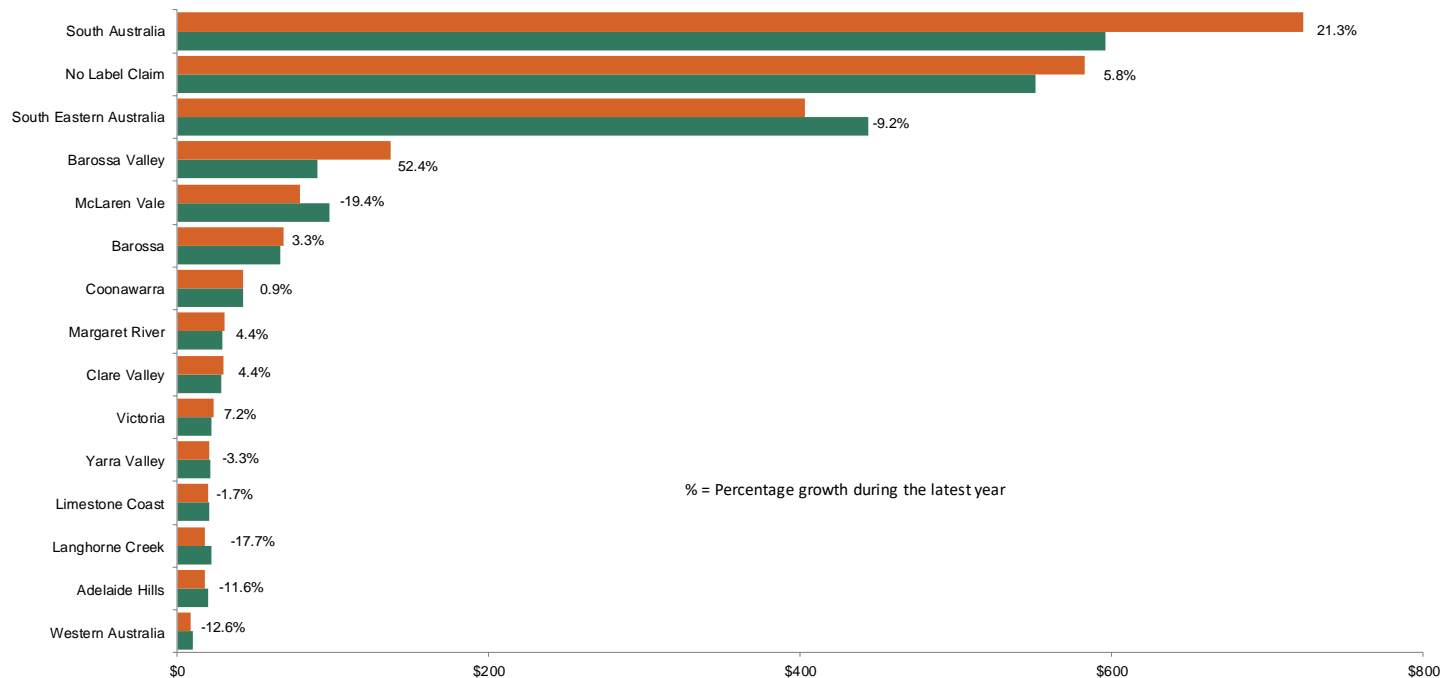
MAT March 2020

Top 15 GI label claims	Volume (million litres)		Value (A\$ million FOB)		Average value (\$A per litre FOB)	
	2020	Change	2020	Change	2020	Change
South Australia	65.06	3%	723.20	21%	11.12	18%
No Label Claim	107.77	-1%	583.05	6%	5.41	7%
South Eastern Australia	104.48	-16%	403.33	-9%	3.86	8%
Barossa Valley	6.16	23%	137.22	52%	22.27	24%
McLaren Vale	6.82	-17%	79.01	-19%	11.59	-2%
Barossa	4.99	-11%	68.38	3%	13.70	17%
Coonawarra	2.97	-9%	42.48	1%	14.32	11%
Margaret River	2.44	3%	30.32	4%	12.44	2%
Clare Valley	3.25	0%	29.53	4%	9.09	5%
Victoria	3.58	9%	23.07	7%	6.44	-2%
Yarra Valley	1.20	-8%	20.38	-3%	17.00	5%
Limestone Coast	2.96	-9%	20.03	-2%	6.78	8%
Langhorne Creek	2.12	-9%	17.95	-18%	8.45	-10%
Adelaide Hills	1.59	-16%	17.65	-12%	11.09	6%
Western Australia	1.24	-19%	8.62	-13%	6.97	9%

Bottled exports

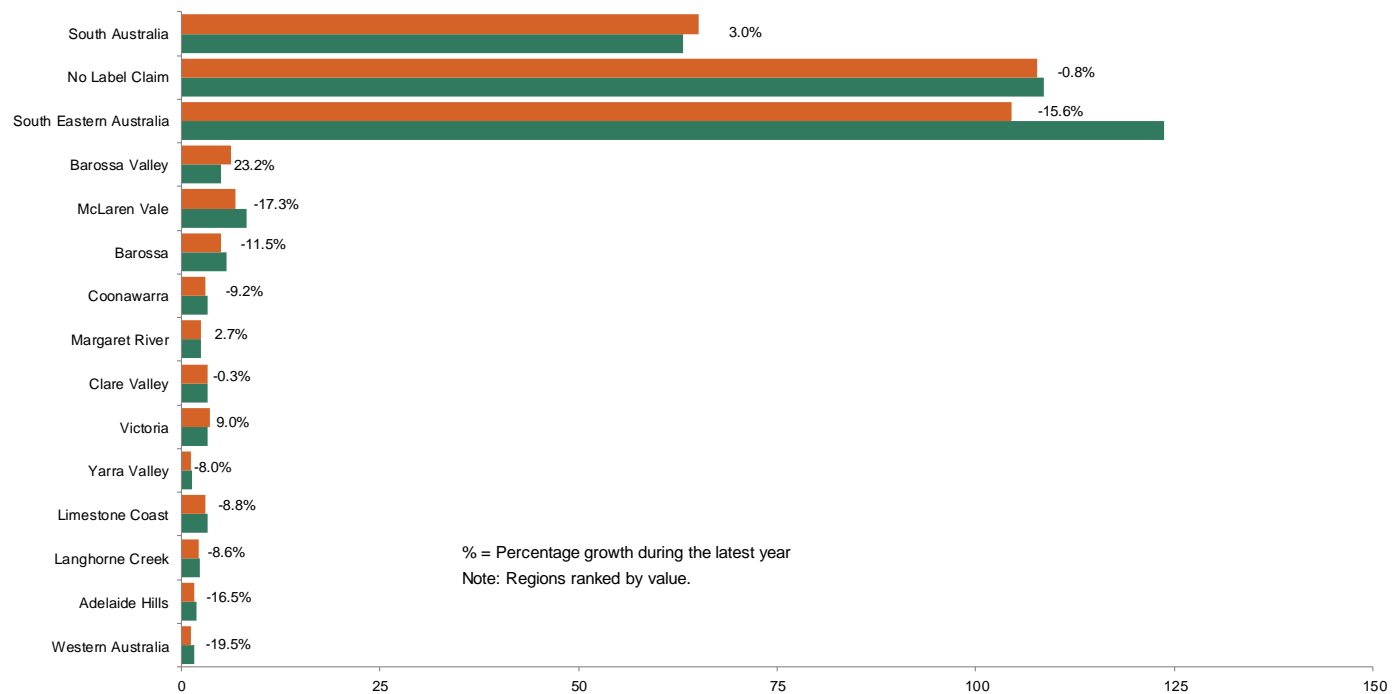
by top 15 GI region label claims

Value (million A\$) for MAT March 2020



Bottled exports by top 15 GI region label claims

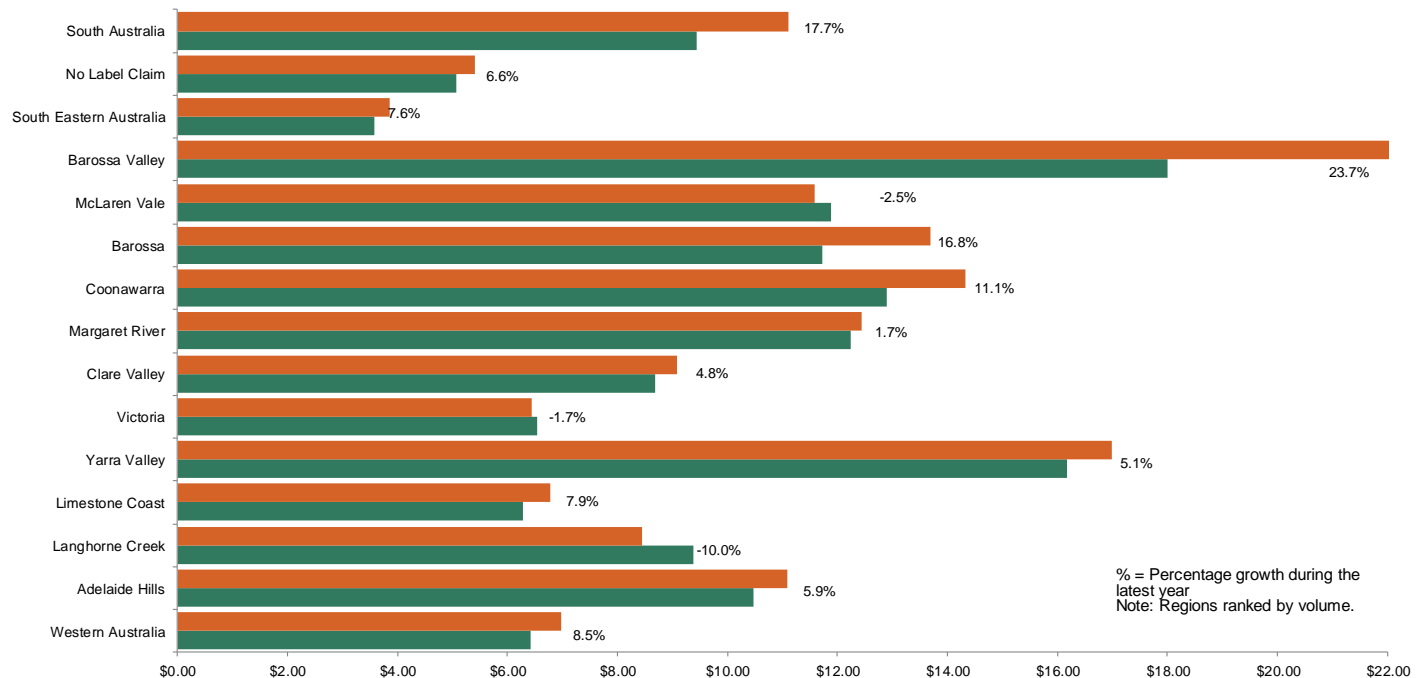
Volume (million litres) for MAT March 2020



2020 2019

Bottled exports by top 15 GI region label claims

Average Value (A\$ per litre) for MAT March 2020



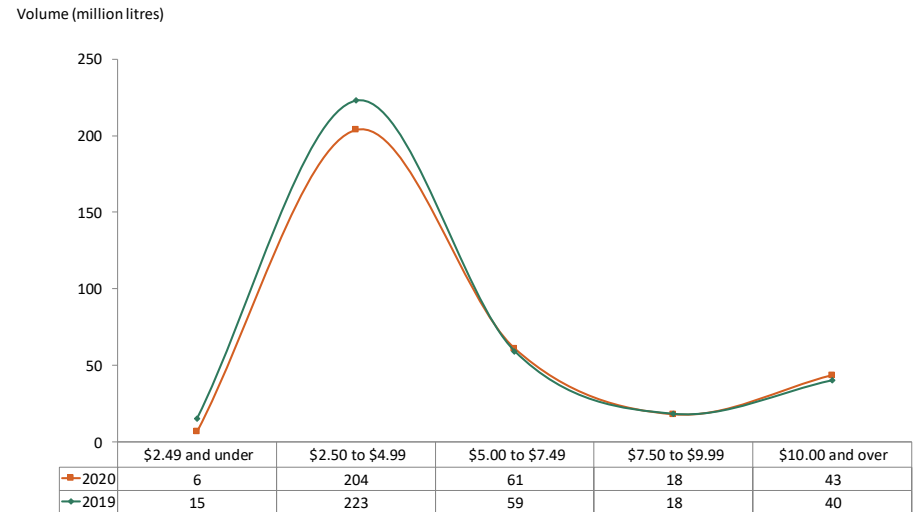
■ 2020 ■ 2019

Bottled exports by price point

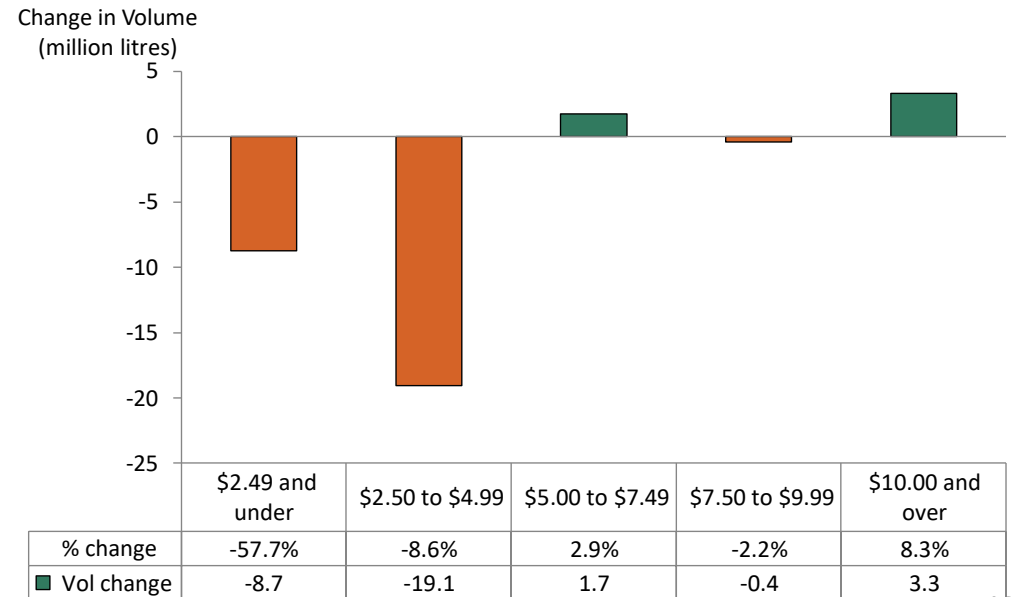
Volume

MAT March 2020

Volume (million litres)



Change in volume (million litres)



Unpackaged wine exports report

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Unpackaged wine exports by price point and destination

Value ('000 A\$) for MAT March 2020

	\$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 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %	MAT March 2020 ('000 AUD)	Change %
UK	69	393%	71,700	-4%	104,061	-10%	19,869	62%	1,816	-35%	10,378	7%	207,893	-3%
USA	1	-99%	6,322	-80%	45,991	47%	14,231	-8%	441	-71%	2,638	27%	69,625	-16%
China	-	na	75	-91%	8,420	-61%	7,807	28%	2,496	-67%	33,169	-8%	51,966	-28%
Germany	-	na	7,017	-41%	19,565	-5%	4,980	195%	1,152	57%	2,750	55%	35,463	-3%
Canada	-	na	4,832	-50%	22,826	-33%	4,477	215%	505	40%	-	na	32,640	-29%
Denmark	-	-100%	2,375	1%	11,312	62%	7,916	733%	171	113%	162	-38%	21,936	106%
New Zealand	0	-100%	4,105	-41%	7,963	10%	1,752	151%	152	-11%	5,478	-12%	19,450	-9%
France	-	na	586	-28%	2,852	7%	5,561	159%	336	567%	385	18%	9,721	62%
Netherlands	-	na	1,336	-61%	6,612	0%	1,590	49%	-	-100%	-	na	9,538	-15%
Belgium	-	na	1,759	-53%	5,655	28%	1,800	200%	-	-100%	10	na	9,224	2%
Japan	-	na	693	-65%	5,362	5%	1,446	12%	290	501%	250	-39%	8,042	-9%
Finland	-	na	44	-96%	2,172	-43%	2,790	404%	-	-100%	575	-9%	5,581	-19%
Sweden	-	na	-	na	423	-44%	711	-53%	398	-8%	1,302	5%	2,834	-28%
Norway	-	na	-	na	701	-25%	368	na	-	na	-	-100%	1,068	-13%
Switzerland	-	na	46	-93%	698	16%	184	0%	-	-100%	138	-32%	1,065	-38%
Spain	-	na	59	-93%	207	-42%	332	32%	52	-52%	247	312%	897	-43%
Ireland	-	na	-	na	572	495%	123	185%	57	-52%	130	na	882	242%
Poland	-	na	-	na	18	-91%	457	-7%	44	na	201	54%	719	-12%
Other	-	na	35	-98%	391	-78%	425	-36%	151	170%	43	-90%	1,044	-79%
Total	70	-75%	100,983	-34%	245,800	-7%	76,817	62%	8,063	-47%	57,856	-4%	489,588	-9%

Unpackaged wine exports by price point and destination

Volume ('000 litres) for MAT March 2020

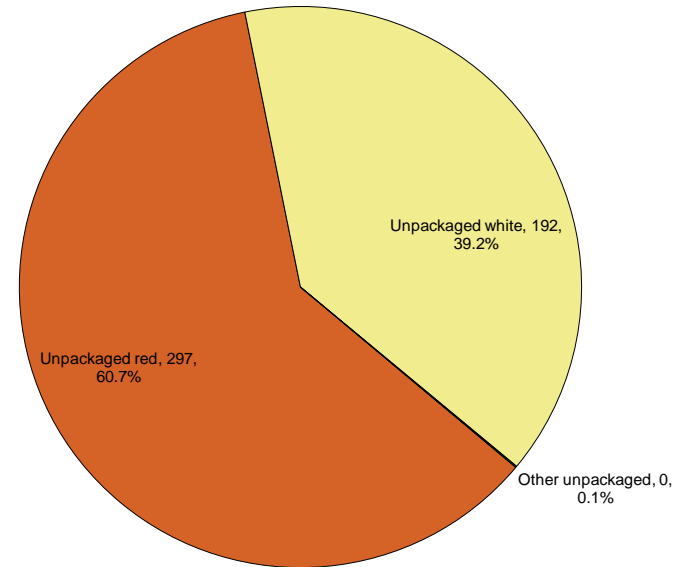
	\$0.50 and under		\$0.50 to \$1.00		\$1.00 to \$1.50		\$1.50 to \$2.00		\$2.00 to \$2.50		\$2.50 and above		Total	
	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %	MAT March 2020 ('000 Litres)	Change %
UK	357	646%	86,667	-3%	84,057	-15%	12,269	66%	826	-37%	2,854	5%	187,029	-6%
USA	1,056	210%	7,108	-79%	38,922	60%	8,661	-9%	194	-72%	613	10%	56,554	-19%
Germany	-	na	7,462	-43%	15,633	-5%	3,216	205%	576	60%	816	31%	27,703	-12%
Canada	-	na	5,468	-53%	19,025	-35%	2,823	239%	250	45%	-	na	27,567	-34%
China	-	na	96	-90%	6,492	-63%	4,556	19%	1,128	-66%	7,080	-6%	19,352	-41%
Denmark	-	-100%	2,616	-2%	8,693	52%	4,726	748%	72	106%	61	0%	16,168	78%
New Zealand	24	-91%	5,616	-40%	6,534	9%	1,117	165%	72	0%	960	-19%	14,322	-17%
Belgium	-	na	2,053	-54%	5,039	35%	1,123	207%	-	-100%	1	na	8,217	-6%
Netherlands	-	na	1,456	-63%	5,573	1%	1,034	49%	-	-100%	-	na	8,063	-21%
France	-	na	601	-34%	2,677	19%	3,591	166%	168	601%	132	42%	7,169	55%
Japan	-	na	720	-67%	4,854	9%	894	20%	137	472%	72	-40%	6,678	-11%
Finland	-	na	51	-96%	1,968	-38%	1,800	468%	-	-100%	137	-8%	3,956	-24%
Sweden	-	na	-	na	383	-36%	392	-54%	192	-11%	484	-2%	1,451	-33%
Switzerland	-	na	48	-94%	568	18%	120	0%	-	-100%	24	-50%	760	-51%
Norway	-	na	-	na	480	-31%	240	na	-	na	-	-100%	720	-9%
Ireland	-	na	-	na	441	466%	78	200%	26	-50%	52	na	597	283%
Spain	-	na	72	-93%	168	-42%	196	36%	26	-50%	98	308%	560	-65%
Poland	-	na	-	na	16	-89%	264	-15%	22	na	72	50%	374	-26%
Other	-	na	48	-98%	311	-78%	263	-35%	72	189%	5	-95%	699	-85%
Total	1,437	108%	120,082	-33%	201,835	-9%	47,363	64%	3,761	-45%	13,460	-3%	387,938	-14%

Unpackaged exports by colour/wine style

Value

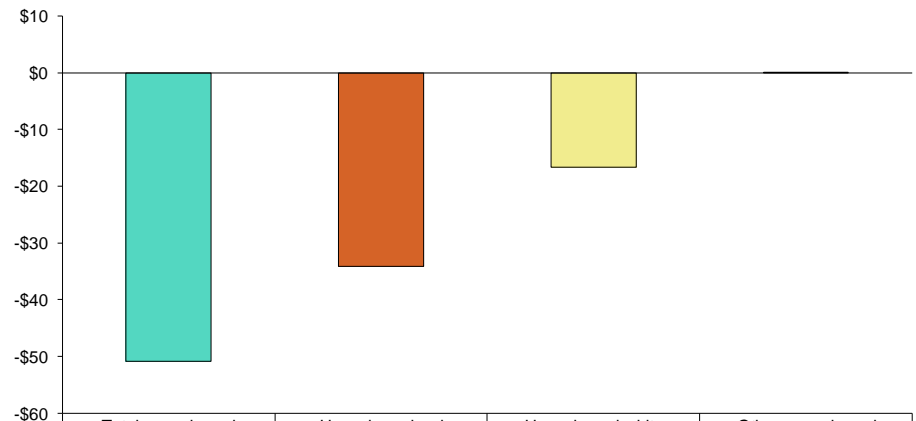
MAT March 2020

Value (A\$ million)



Change in Value (A\$ million)

Change in Value (million AUD)



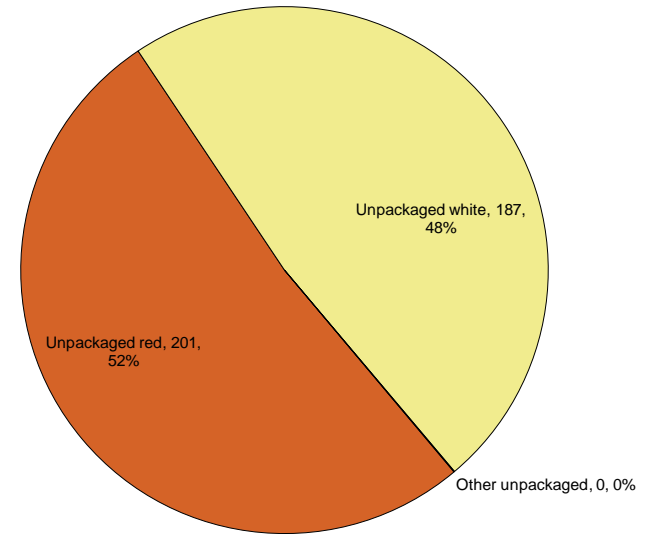
	Total unpackaged	Unpackaged red	Unpackaged white	Other unpackaged
% change	-9.4%	-10.3%	-8.0%	5.6%
Val change	-50.8	-34.2	-16.7	0.0

Unpackaged exports by colour/wine style

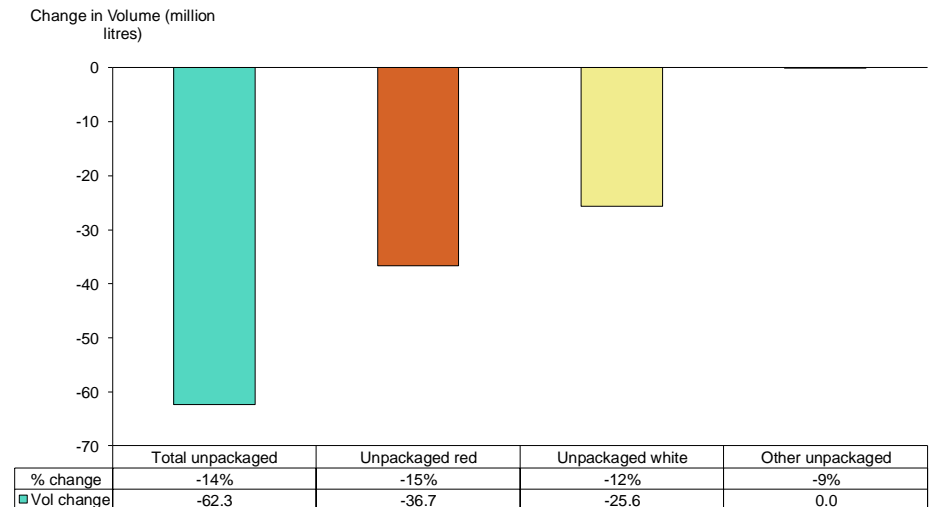
Volume

MAT March 2020

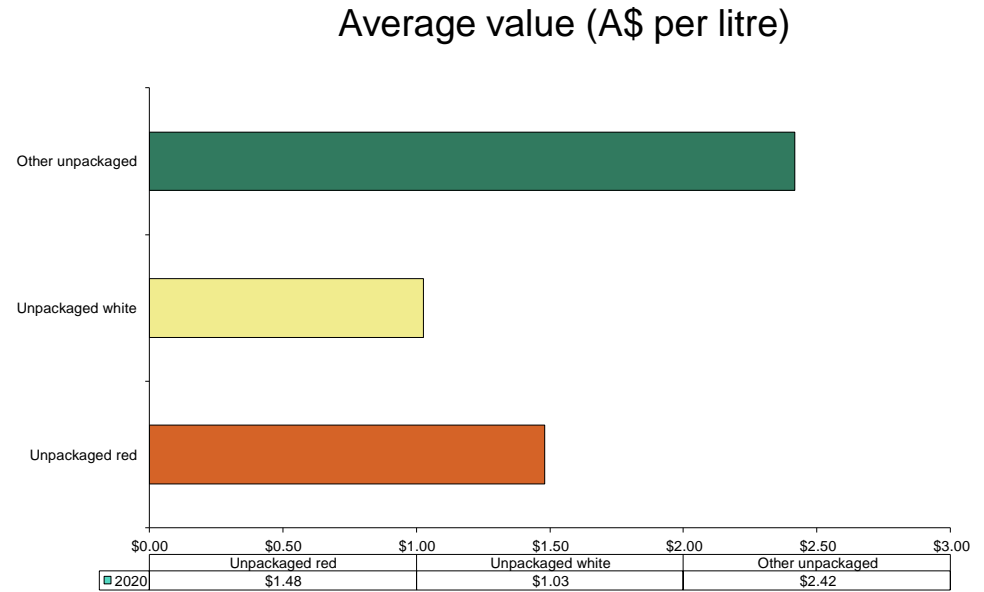
Volume (million litres)



Change in Volume (million litres)



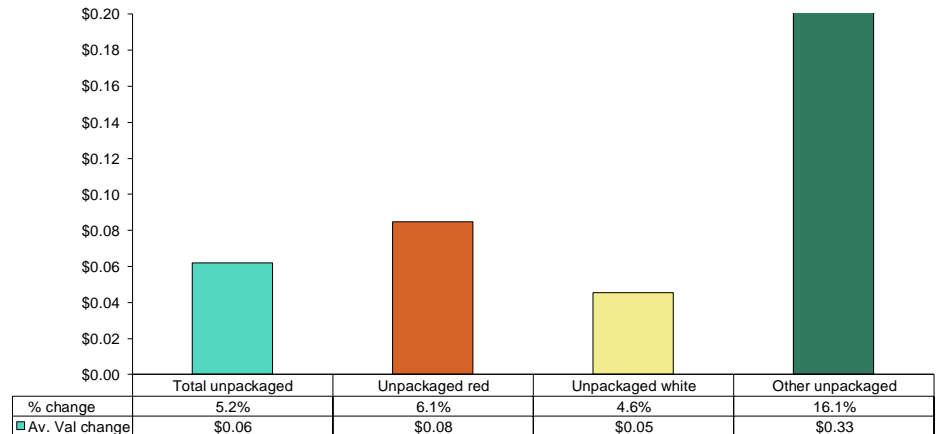
Unpackaged exports by colour/wine style



Average value

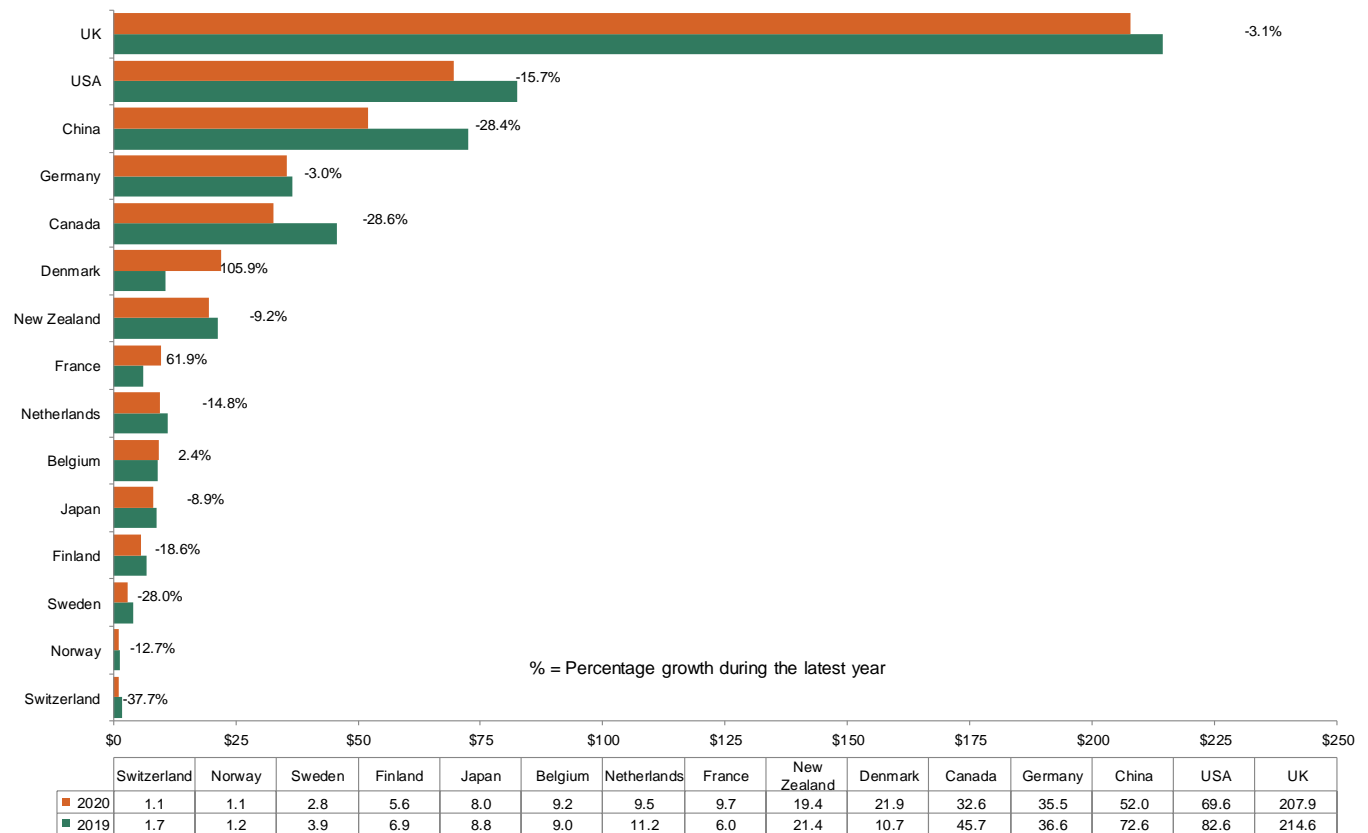
MAT March 2020

Change in average value (A\$ per litre)



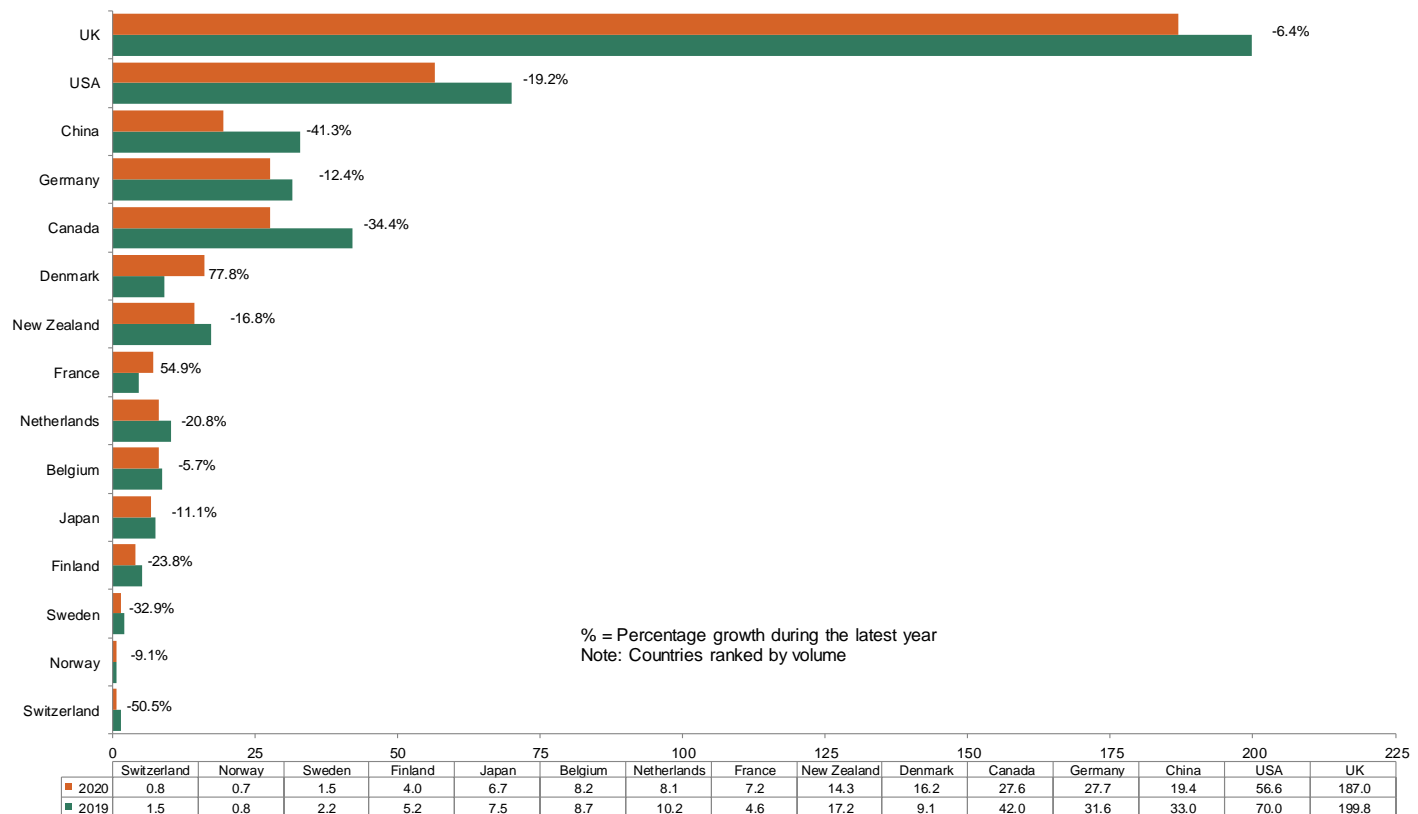
Unpackaged exports by top 15 destinations

Value (million A\$) for MAT March 2020



Unpackaged exports by top 15 destinations

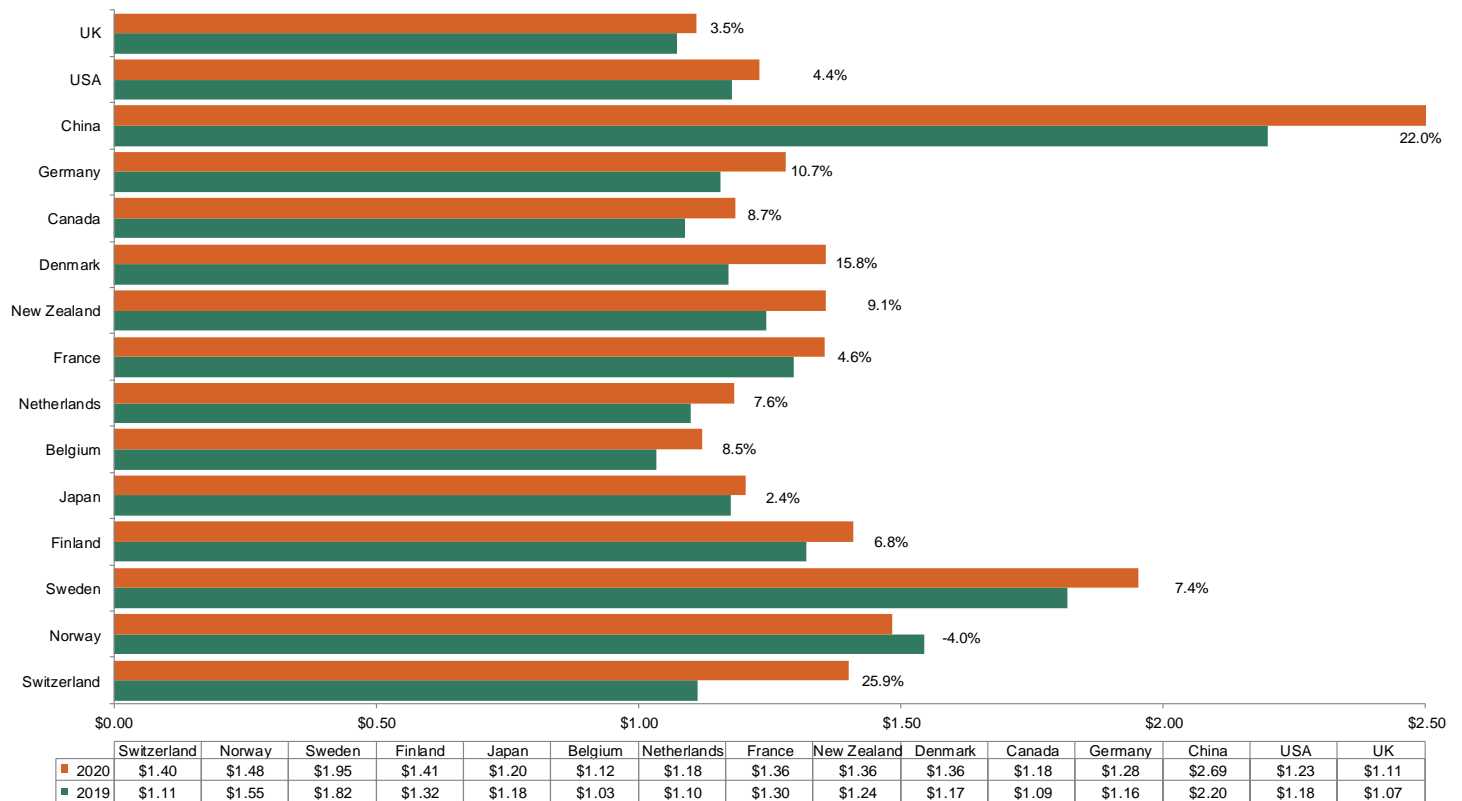
Volume (million litres) for MAT March 2020



Unpackaged exports by top 15 destinations

Average Value (A\$ per litre) for MAT March 2020

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

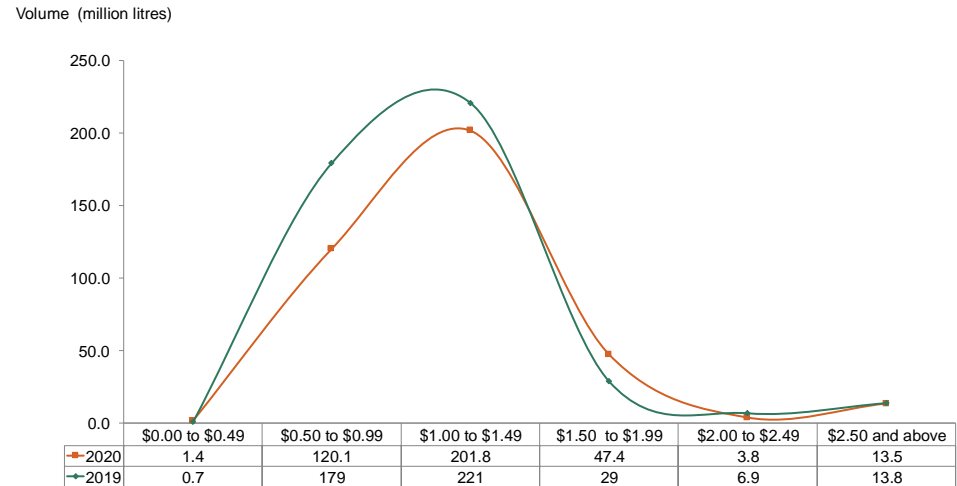


Unpackaged exports by price point

Volume

MAT March 2020

Volume (million litres)



Change in Volume (million litres)



Notes & definitions

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

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- **Export Approvals:** Wine approved by the Wine Australia for export on specified dates. Exports reported in this document refer to the date wine is shipped and not the date of approval. Note that the A\$ FOB value of wine reported in this document may differ from export values reported by the Australian Bureau of Statistics (ABS). The divergence between the two values derives from differences between the Wine Australia and ABS in the method of converting the value of exports denominated in foreign currency to A\$. In the case of Australia, the exporter makes the conversion when submitting wine for export approval while the ABS converts the value on the day of shipment, at the daily conversion rate. With the Wine Australia method, it is expected that some of the conversions will occur at hedged rates while this does not occur with the ABS method. When the Australian exchange rate is moving significantly the alternative methods will result in diverging valuations. Volumes reported by the Wine Australia and ABS differ only marginally due to the “approval” versus “shipment” basis of reporting as well as marginal differences in scope and definition.
- **MAT:** Moving Annual Total - refers to the twelve months ending with the nominated month.
- **% Change :** Is calculated as the percentage change in the MAT for the immediate past 12 months compared to the preceding 12 months.
- **Formula:** $\% \text{ Change} = ((\text{current MAT} - \text{preceding MAT}) / \text{preceding MAT}) \times 100$
- **A\$:** Australian dollars
- **FOB:** 'Free on board' value of the wine, where the point of valuation is where goods are placed on board the international carrier, at the border of the exporting country. The FOB value includes production and other costs up until placement on the international carrier but excludes international insurance and transport costs.
- **Country:** In most instances, this indicates where the wine is consumed. In some instances, it may be the country at which the wine is off-loaded for bottling and/or trans-shipment to the country of final consumption.

Notes & definitions (continued)

- **Still wine:** Still wine in bottles, casks, flagons or bulk containers.
- **Unpackaged:** Wine shipped for repackaging elsewhere. This may involve containers with a capacity of 20 litres or more but will most often mean large shipping containers of size ranging between 10 000 and 24 000 litres.
- **Cask or Soft packs:** Plastic containers within cardboard outers usually carrying between 2 and 20 litres.
- **Flagons:** Glass containers holding 2 litres or more.
- **Bottles:** Glass containers holding less than 2 litres.
- **Alternative Packaging:** Includes: Flagon, Tetra-pak, PET and Aluminium
- **Red Wine:** Amounts reported may or may not include both dry red wine and rose
- **White wine:** Amounts reported may or may not include both dry and sweet white wine
- **Fermented sparkling:** Sparkling wine in which the effervescence is produced naturally through secondary fermentation in the bottle.

Wine Australia providing insights on **Australian Wine**

Export Report