Wine Australia providing insights on Australian Wine

Export Report

Moving Annual Total (MAT)

To September 2019

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Summary Report

Executive summary

- Record average value of bottled exports at $6.79 per litre.
- The value of exports above $10 per litre reached the $1 billion mark for the first time.
- Exports to the United States of America grew, with exports above $10 per litre growing by 20 per cent to the highest value since 2009.
- Continued growth to China.
- Encouraging growth in exports to the Netherlands, United Arab Emirates, Denmark, South Korea and Belgium.

Commentary

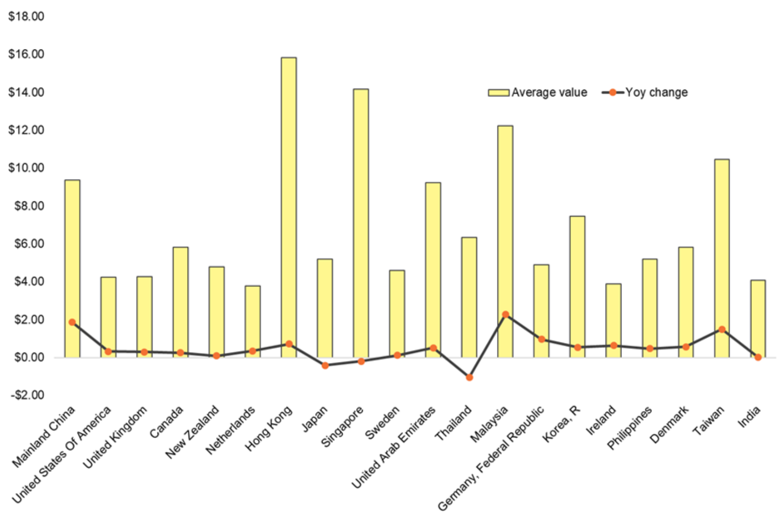
Overview

In the year ended September 2019, the value of Australian wine exports increased by 7 per cent to $2.89 billion free on board (FOB), while volume declined by 8 per cent to 774 million litres (86 million 9-litre case equivalents). Average value increased by 16 per cent as a result, to $3.74 per litre, the highest level since mid-2008. This exceptional result in average value is driven by record-setting growth in exports above $10 per litre, which offset decreased shipments below $5 per litre.

Packaged and unpackaged wine

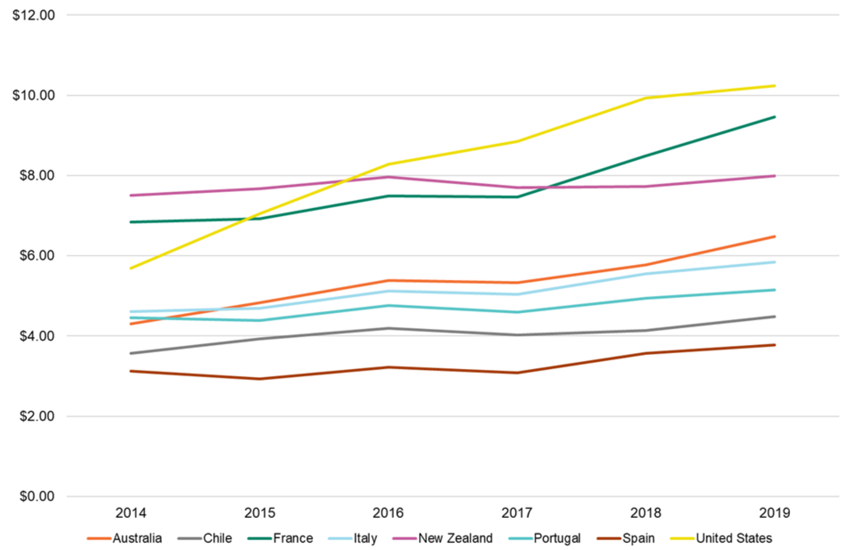
Glass bottle exports increased by 9 per cent in value to $2.36 billion, while volume decreased by 5 per cent to 348 million litres (39 million 9-litre case equivalents). The increase in value was due to a 15 per cent rise in the average price of bottled wine to $6.79 per litre, a record value, which more than offset the decline in volume. All but 3 of the top 20 destinations for bottled wine drove this increase (see Figure 1).

Figure 1: Top 20 destinations for bottled wine – average value FOB and change



To put the growth in average value of bottled exports into context, Global Trade Atlas (GTA) data of the major exporters of wine for the year ended July 2019 reveals that Australia is keeping up with its competitors (see Figure 2). The chart illustrates that Australian bottled wine is exported at a higher price than wine from Italy, Portugal, Chile and Spain. While the United States of America (USA) and New Zealand do receive a higher average value for their bottled wine exports, they export much lower volume than the other countries. The clear leader in average value growth is France; on a percentage increase basis, Australia has performed similarly in the past 12 months.

Figure 2: Average value of bottled wine by source country (AUD per litre)



Other packaging formats include soft pack, which increased by 4 per cent in value to $14 million and decreased by 1 per cent in volume to 7.1 million litres, and other alternative packaging (such as canned wine and 187 ml plastic bottles), which decreased in value by 41 per cent to $4.2 million and decreased in volume by 42 per cent to 0.7 million litres.

Commentary (continued)

Unpackaged wine exports continued their decline during the period, down by 3 per cent in value to $512 million and 10 per cent in volume to 419 million litres (47 9-litre case equivalents). Average value increased by 9 per cent to $1.22 per litre FOB, the highest level since early 2009.

The decline in the overall Australian export volume is due to a combination of factors:

- Australia's 2018 and 2019 vintages were smaller than the record-breaking 2017 vintage, meaning there is relatively less supply available for shipping overseas
- international supply pressures have eased with a larger 2018 global vintage, increasing competition in the market, and
- the premiumisation and moderation trends in established wine markets are putting downward pressure on volume and lifting average values.

Figure 3 illustrates that supply pressures are causing both unpackaged and glass bottle exports to decline by volume. However, this decline is stronger for unpackaged wine, given the competitive nature of the commercial wine market. The decline in the volume of glass bottle exports is less apparent due to the growth of exports at the premium end of the market.

Price segments

In the year ended September 2019, there was growth in all price segments above $5 per litre (see Figure 4), reflecting the increasing global demand for premium Australian wine. Wine shipped at an average value of $10 per litre and above reached record levels for both value and volume. Total value passed the $1 billion mark for the first time, increasing by 30 per cent from the previous year, while volume increased by 27 per cent to 45 million litres.

The decline in exports below $2.50 per litre was evident in both unpackaged and bottled wine, while the decline in exports between $2.50 and $4.99 per litre was driven by bottled wine. However, a 56 per cent increase in the value of bulk wine in this segment served to lessen the impact of this decline.

Figure 3: The volume of glass bottle versus unpackaged exports over time

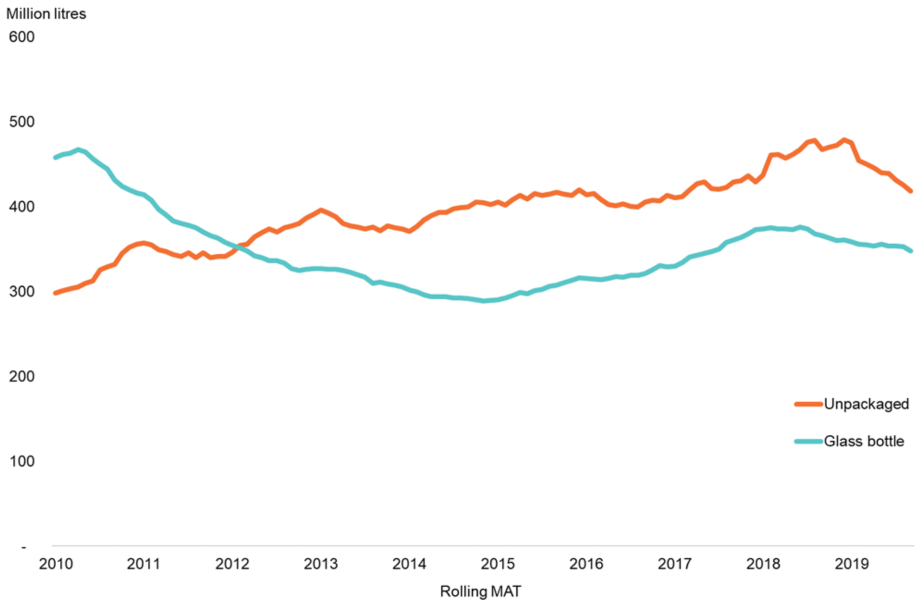


Figure 4: Exports by price segment (million AUD FOB)

Price segment (A$/litre)	MAT September 2019	Value change	Growth rate
$2.49 and under	$490	-$53	-9.8%
$2.50 to $4.99	$817	-$20	-2.4%
$5.00 to $7.49	$374	$12	3.4%
$7.50 to $9.99	$162	$3.6	2.2%
$10.00 to $14.99	$267	$60	29%
$15.00 to $19.99	$79	$6.0	8.2%
$20.00 to $29.99	$247	$78	47%
$30.00 to $49.99	$130	$32	33%
$50.00 to $99.99	$221	$33	17%
$100.00 to $199.99	$56	$36	181%
$200.00 +	$50	$0.1	0.1%
Total value	$2,893	$188	6.9%

Commentary (continued)

Exporter performance

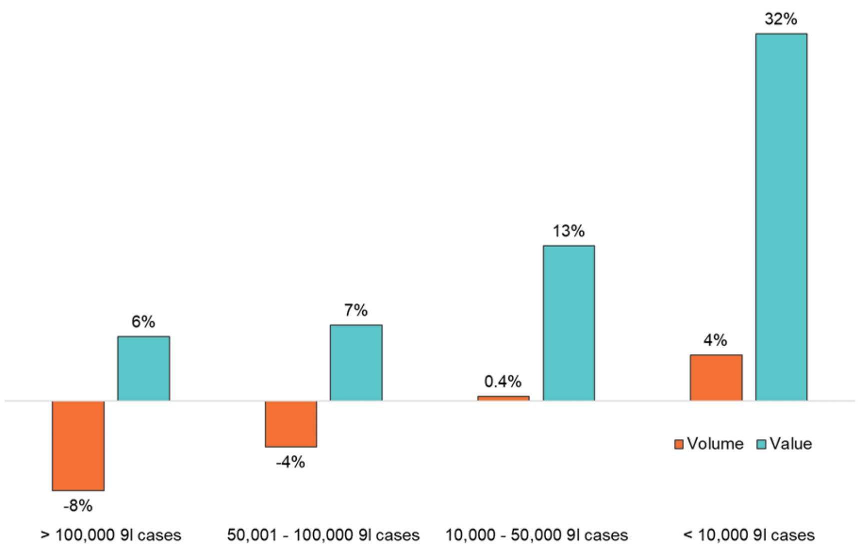
There were 2797 companies exporting wine in the year ended September 2019, a 16 per cent increase from the previous year. The largest exporters make up 2 per cent of exporters but contribute 71 per cent of the value and 87 per cent of the volume, while the smallest exporters make up 90 per cent of exporters, but only 16 per cent of the value and 6 per cent of the volume (see Figure 5).

The 2797 current exporters are roughly split into thirds by those in growth (35 per cent), those in decline (32 per cent), and those who started exporting during the 12-month period (33 per cent). The 1890 companies that started exporting or increased their level of exports contributed $505 million to the growth in total value. This was partially offset by 907 companies that have reduced their exports and 526 companies that ceased exporting. These companies declined by $318 million. Figure 6 illustrates that all exporter size segments contributed to the rise in export value, while the larger exporters contributed to the decline in volume.

Figure 5: Export value and volume by exporter size

Volume exported in MAT September 2019	# of exporters	Share of exporters	Million cases exported	Share of total export volume	Million AUD exported	Share of total export value
> 100,000 9l cases	52	2%	75	87%	$2,064	71%
50,001 - 100,000 9l cases	33	1%	2	3%	$124	4%
10,000 - 50,000 9l cases	193	7%	4	5%	$252	9%
< 10,000 9l cases	2,519	90%	5	6%	$453	16%
Total	2,797	100%	86	100%	$2,893	100%

Figure 6: Export growth rates by exporter size



Destinations

In the year ended September 2019, Australia exported wine to 123 markets. Nearly all the major global regions imported more Australian wine in the past year, with the exception being Europe, which declined by 3 per cent to $587 million FOB.

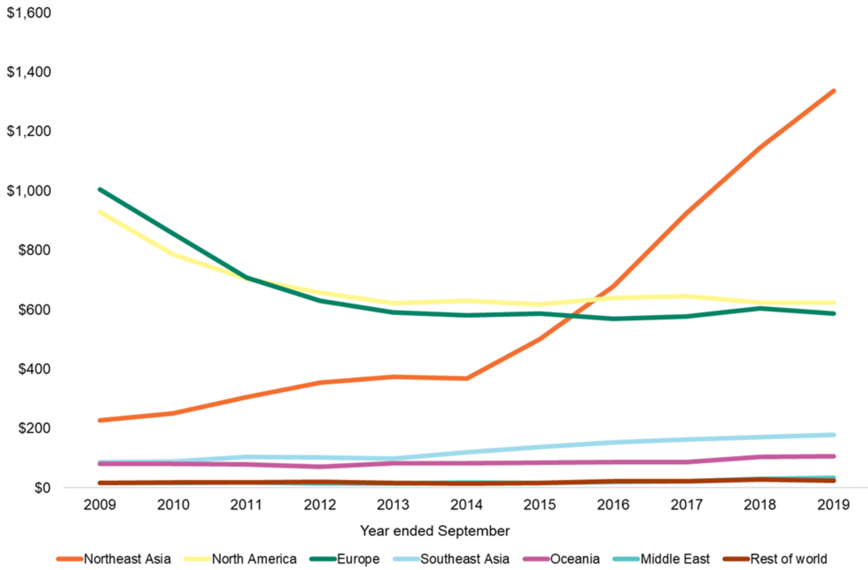
The regions in growth are:

- Northeast Asia, 17 per cent to $1.34 billion,
- North America, 0.1 per cent to $625 million,
- Southeast Asia, 5 per cent to $179 million,
- Oceania, 1 per cent to $106 million, and
- Middle East, 16 per cent to $35 million.

Commentary (continued)

Figure 7 illustrates the trend in exports by region since the global financial crisis. North America and Europe have largely followed a similar trend, but most recently they started diverging, with the USA fuelling growth in North America and the United Kingdom (UK) contributing to the decline in Europe. Asian markets have experienced phenomenal growth, Northeast Asia being the stand-out performer thanks to Australian wine's success in China. However, Southeast Asia has also shown steady growth since 2013; the destinations driving this growth in the past year are Indonesia, Philippines, Vietnam and Singapore.

Figure 7: Value of exports to regions over time (million AUD FOB)



China

Australian wine exports to China (including Hong Kong and Macau) reached a record level by value and average value during the year ended September 2019. Value increased by 18 per cent to $1.25 billion, while volume decreased by 16 per cent to 148 million litres (16 million 9-litre case equivalents). Average value increased by 40 per cent to $8.42 per litre FOB.

Mainland China

Exports to mainland China increased by 19 per cent in value to $1.13 billion, also a record, while volume declined by 16 per cent to 140 million litres (15.5 million 9-litre case equivalents). Average value increased to a record level of $8.08 per litre FOB.

While glass bottle volume did decline slightly, by 1 per cent to 114 million litres (13 million 9-litre case equivalents), almost all the volume decline was in unpackaged wine, down by 51 per cent to 25 million litres (2.8 million 9-litre case equivalents). Alternative and soft packaging accounts for about 0.2 per cent of volume shipped to mainland China.

Consistent with the decline in unpackaged wine, price segments below $5 per litre FOB declined, with the $2.49 and under segment being the biggest contributor (see Figure 8). Exports with an average value above $10 per litre increased by 52 per cent to $663 million, the largest absolute growth being from the $20 to $29.99 segment.

Figure 8: Exports to mainland China by price segment (million AUD FOB)

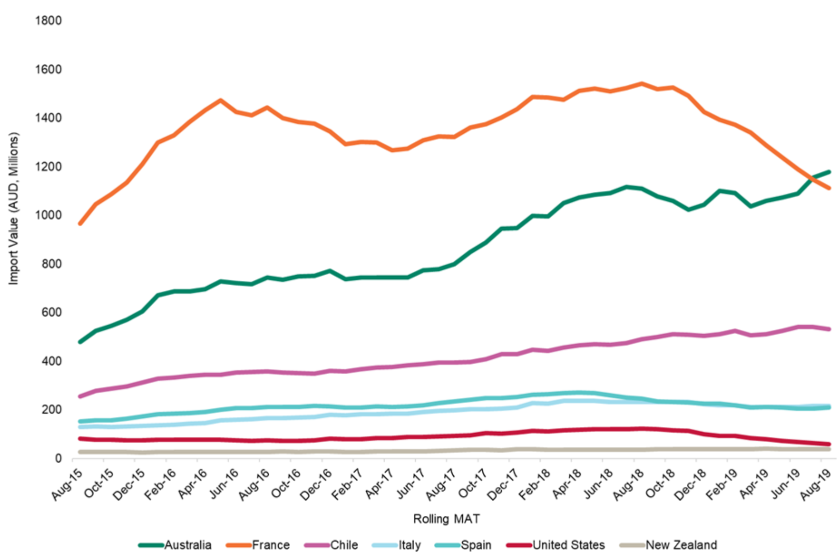
Price segment (A$/litre)	MAT September 2019	Value change	Growth rate
$2.49 and under	$31	-$40	-56%
$2.50 to $4.99	$217	-$14	-5.9%
$5.00 to $7.49	$162	$16	11%
$7.50 to $9.99	$59	-$4.9	-7.6%
$10.00 to $14.99	$148	$55	58%
$15.00 to $19.99	$44	$9.3	27%
$20.00 to $29.99	$179	$74	71%
$30.00 to $49.99	$88	$35	66%
$50.00 to $99.99	$145	$27	23%
$100.00 to $199.99	$32	$24	302%
$200.00 +	$28	$2.7	11%
Total value	$1,133	$183	19%

Commentary (continued)

This month the International Monetary Fund (IMF) further reduced its forecast growth rate for China's economy to 6.1 per cent in 2019. This is due to a softening of consumer demand in China, which impacts on imports of products such as wine.

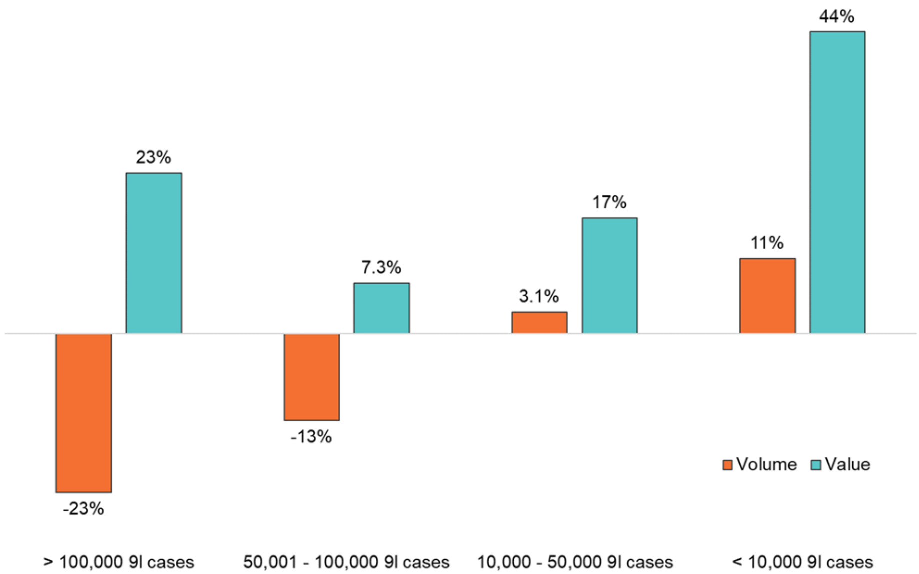
Total wine imports declined by 11 per cent in value (AUD) in the year ended August 2019 (GTA), with French wine being the biggest contributor to the decline. Australia's long-term growth trend, coupled with France's sudden decline, has led to Australia becoming the number one source for wine by value in China's imported market for the first time (see Figure 9). Chile still holds the number one position by volume due to its place as number one for bulk imports.

Figure 9: China imports of total wine by value from top seven countries of origin



An analysis of growth rates by Australian exporter size reveals that all exporter size segments have contributed to value growth but only the larger exporters are declining in volume. This is consistent with the decline in unpackaged, commercial wine – most often shipped by bigger companies.

Figure 10: Export growth rates to mainland China by exporter size



Stuart Barclay, Wine Australia's General Manager Marketing, said 'The Australian wine market in mainland China continues to develop strongly with an increase in value, which shows continued confidence in the quality and the overall premium message of Australian wine.

'While volumes have decreased for exports under $2.50 per litre, this again reinforces that the China market is looking to Australia to provide high-quality fine wines for this dynamic market. The strong positioning of Australian fine wine in the Chinese market is exciting and new Chinese wine drinkers are recognising that Australia provides exceptional opportunities for drinkers across multiple price points. While growth is softening, the demand for Australian fine wines continues to grow, supported by our active strategy in China to engage across trade and emerging consumers.'

Commentary (continued)

North America

United States of America

Exports to the USA increased by 3 per cent to $436 million during the year ended September 2019. Volume declined by 9 per cent to 146 million litres (16 million 9-litre case equivalents), leading to an increase in average value by 13 per cent to $2.97 per litre FOB.

Like exports to China, most of the volume decline was in shipments of unpackaged wine, down by 18 per cent to 61 million litres (6.8 million 9-litre case equivalents). Glass bottle shipments also declined slightly by 2 per cent to 85 million litres (9.5 million 9-litre case equivalents). However, the value of bottled wine increased by 7 per cent to $362 million, due to an increased average value of bottled wine by 8 per cent to $4.24 per litre FOB.

This increase in average value of bottled wine is a result of the growth in exports of premium Australian wine to the USA. Exports with an average value of $10 and above increased by 20 per cent to $47 million, the highest value since late 2009.

Every price segment above $20 per litre increased in value during the period (see Figure 11). The $2.50 to $4.99 per litre segment was the biggest contributor to the change in total value, while the $7.50 to $9.99 per litre and $10 to $14.99 per litre segments also drove growth.

The USA wine market remains challenging with increasing competition from domestic wine producers due to an oversupply of domestic wines, plus all sources competing against each other for a shrinking share of the alcoholic drinks market due to the rising popularity of craft spirits (source: bw166). In the off-trade market, wine price segments above US$11 per bottle are the driver of the 2 per cent total value growth (IRI Worldwide, year ended June 2019), so increased shipments of premium wine mean that Australia is well placed to meet this demand.

Figure 11: Exports to the USA by price segment (million AUD FOB)

Price segment (A$/litre)	MAT September 2019	Value change	Growth rate
$2.49 and under	$80	-$9.3	-10%
$2.50 to $4.99	$267	$12	4.6%
$5.00 to $7.49	$22	-$0.2	-0.9%
$7.50 to $9.99	$19	$2.9	18%
$10.00 to $14.99	$21	$4.0	23%
$15.00 to $19.99	$8.7	-$0.2	-2.2%
$20.00 to $29.99	$7.7	$1.7	28%
$30.00 to $49.99	$4.7	$1.1	31%
$50.00 to $99.99	$2.9	$0.6	28%
$100.00 to $199.99	$1.3	$0.5	73%
$200.00 +	$0.6	$0.1	11%
Total value	$436	$13	3.1%

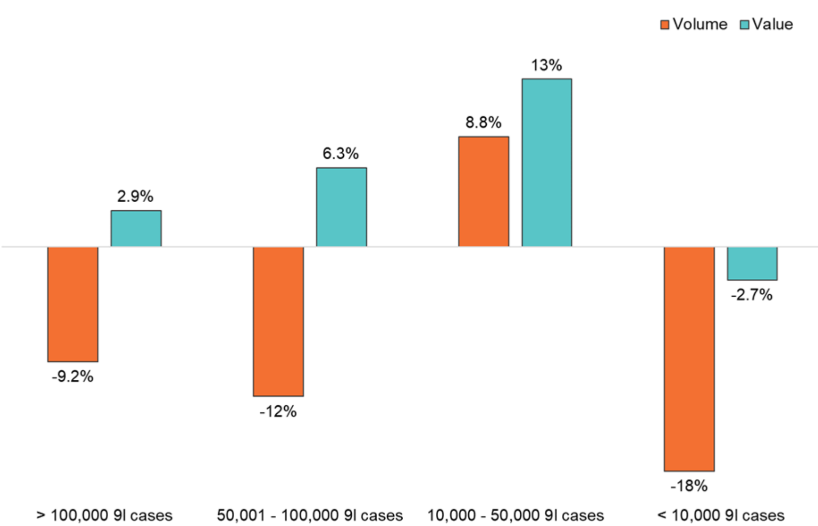
This increase in export value comes after several years of volatile performance in the USA for Australian wine. However, perceptions of Australian wine are slowly changing; a recent survey of the trade by Wine Opinions showed that 68 per cent of respondents are predicting growth of Australian wine's share in the USA market, compared with only 3 per cent predicting decline. These attitudes are not formed overnight, and it is thanks to the hard work done by Australia's wine brands that the ground work is being laid for a sustained period of growth of Australian premium wine in the USA.

Aaron Fruin, Sales & Marketing Manager for Mitolo Wines, said, 'We are seeing more interest and enquiry for our wines in the US and our Q1 has us on track to deliver our best year in market since FY14. We compete at a premium position to the category and momentum feels like it is building as reflected in order rate over the past 6 to 9 months – which mirrors Wine Australia Export Report trends. A long way to go but we believe the end result will be worth the effort and investment and that's why Mitolo remain willing to support collaborative initiatives like the recent Wine Australia roadshows.'

Commentary (continued)

There were 263 Australian wine exporters to the USA in the year ended September 2019, a 4 per cent increase from the previous year. Figure 12 portrays that all but one of the exporter size segments are growing in export value, the exception being the segment of smallest exporters. Exporters shipping 10,000 to 50,000 9-litre case equivalents per year had the most positive performance, being the only segment to grow by volume and value (by 13 per cent).

Figure 12: Export growth rates to the USA by exporter size



Aaron Ridgeway, Wine Australia's Regional General Manager Americas, said 'The total market continues to juxtapose significant potential beside a cluster of challenges.

'Newer consumer choices such as cannabis, canned wines and "hard seltzer" hand a sizable advantage to domestic production and supply. And the durable strength of domestic bottled wine and sustained growth of Prosecco and rosé from Europe still amount to a tough trading environment.

'However, Australian wine continues to show growth at price points that are consistent with long-term category health and deliver margin to producers. With the strong results of the past three months, it is clear that strategic category redevelopment and renewed supplier investment are paying off.'

Canada

In the year ended September 2019, Australian wine exports to Canada declined by 6 per cent in value to $188 million and 15 per cent in volume to 60 million litres (6.7 million 9-litre case equivalents). The average value of exports increased by 10 per cent to $3.13 per litre FOB. Unpackaged and bottled wine each contributed approximately $5 million to the decline in value, while the volume decline was heavily skewed towards unpackaged wine shipments. Most provinces recorded declines, with British Columbia, Ontario and Alberta being the largest contributors. However, exports to Quebec grew by 10 per cent to $48 million.

Australia is not the only country experiencing declining exports to the Canadian wine market – most of the major sources have declined, aside from Spain. The total market has declined in volume by 2 per cent to 52 million cases, according to sales data for the year ended September 2019 from the Canadian Vintners Association. Like other markets, wine is facing challenges from other alcoholic beverages such as spirits and ready-to-drink products.

Commentary (continued)

Fortunately, for Australian exports, the market above $7.50 per litre is still growing (see Figure 13) – the $7.50 to $9.99 segment increased by 5 per cent to $18 million and exports above $10 per litre grew by 6 per cent to $26 million.

Figure 13: Exports to Canada by price segment (million AUD FOB)

Price segment (A$/litre)	MAT September 2019	Value change	Growth rate
$2.49 and under	$39	-$6.7	-15%
$2.50 to $4.99	$40	-$4.9	-11%
$5.00 to $7.49	$65	-$2.7	-4.0%
$7.50 to $9.99	$18	$0.8	4.8%
$10.00 to $14.99	$20	$1.6	8.9%
$15.00 to $19.99	$2.4	$0.2	10%
$20.00 to $29.99	$1.3	-$0.2	-11%
$30.00 to $49.99	$1.2	-$0.1	-9.3%
$50.00 to $99.99	$0.5	-$0.1	-16%
$100.00 to $199.99	$0.1	$0.0	-11%
$200.00 +	$0.1	-$0.1	-54%
Total value	$188	-$12	-6.1%

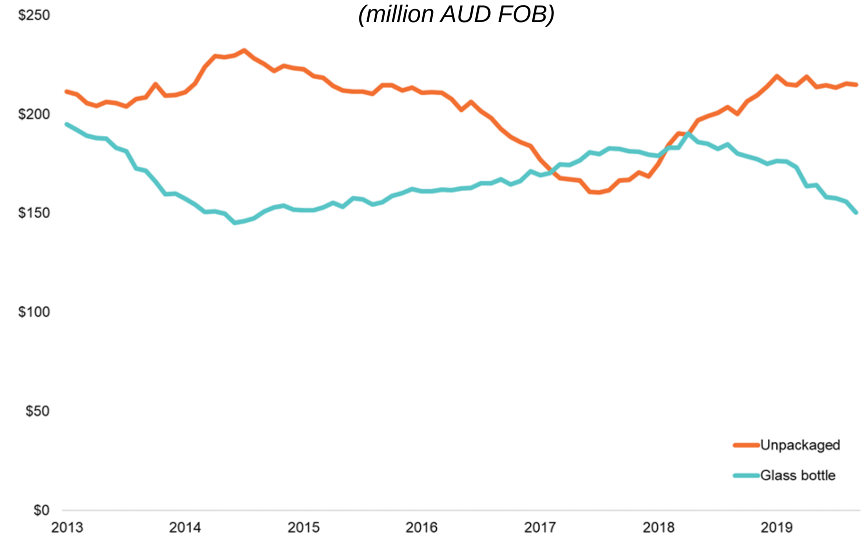
Europe

United Kingdom

Exports to the UK declined by 4 per cent in value to $365 million and 2 per cent in volume to 233 million litres (26 million 9-litre case equivalents). Average value decreased by 2 per cent to $1.57 per litre FOB.

Unlike other markets, the decline was felt solely in the bottled wine category (see Figure 14), decreasing by 17 per cent in value to $150 million and 22 per cent in volume to 35 million litres (3.9 million 9-litre case equivalents). Unpackaged wine shipments increased by 7 per cent in value to $215 million and 2 per cent in volume to 198 million litres (22 million 9-litre case equivalents). Some 85 per cent of the total volume shipped to the UK is unpackaged and bottled in market, making it an important destination for Australia's bulk wine exporters; in fact, the UK receives more than three times the volume of unpackaged wine than the second-place destination (the USA).

Figure 14: Glass bottle versus unpackaged exports to the UK over time (million AUD FOB)



Consistent with the above, shipments with an average value below $2.50 per litre FOB increased by 4 per cent to $207 million. Bottled wine between $5.00 and $9.99 per litre FOB also showed good growth.

Figure 15: Exports to the UK by price segment (million AUD FOB)

Price segment (A$/litre)	MAT September 2019	Value change	Growth rate
$2.49 and under	$207	$8.4	4.3%
$2.50 to $4.99	$99	-$22	-18%
$5.00 to $7.49	$25	$0.7	2.8%
$7.50 to $9.99	$13	$1.2	10%
$10.00 to $14.99	$10	-$1.9	-16%
$15.00 to $19.99	$3.2	-$1.1	-25%
$20.00 to $29.99	$3.0	$0.0	-1.1%
$30.00 to $49.99	$2.6	$0.0	-1.2%
$50.00 to $99.99	$1.5	$0.4	40%
$100.00 to $199.99	$0.2	-$0.3	-61%
$200.00 +	$0.4	-$0.1	-29%
Total value	$365	-$15	-4.0%

Commentary (continued)

Australia remains number one in the UK off-trade market and has been so for 20 years, and sales grew by 0.2 per cent in value to £1.2 billion in the year ended June 2019 (IRI Worldwide). The total market is also relatively stagnant, growing by 0.1 per cent to £5.3 billion. The price segments driving growth for Australia in the off-trade are:

- £5.01 to £6.00, by 1 per cent
- £7.01 to £8.00, by 7 per cent
- £8.01 to £9.00, by 18 per cent, and
- £10.01 to £20.00, by 10 per cent.

Laura Jewell MW, Wine Australia's Regional General Manager EMEA said, 'The focus in the UK is all about Brexit and, at the time of writing, we still do not know when we will be leaving the EU.

'The economy is expected to return to growth in Q3, but the outlook beyond that is largely dependent on whether and how the UK leaves the EU. Underlying economic momentum is likely to be meek regardless, held back by soft business investment and a downbeat global economy, but we are set to avoid recession.

'In the meantime, wine importers have continued to make sure they have adequate contingency stocks both in the UK and across northern Europe. This is reflected in the Australian unpackaged figures, with most of the large brands packaging in the UK and then distributing across the rest of Europe.

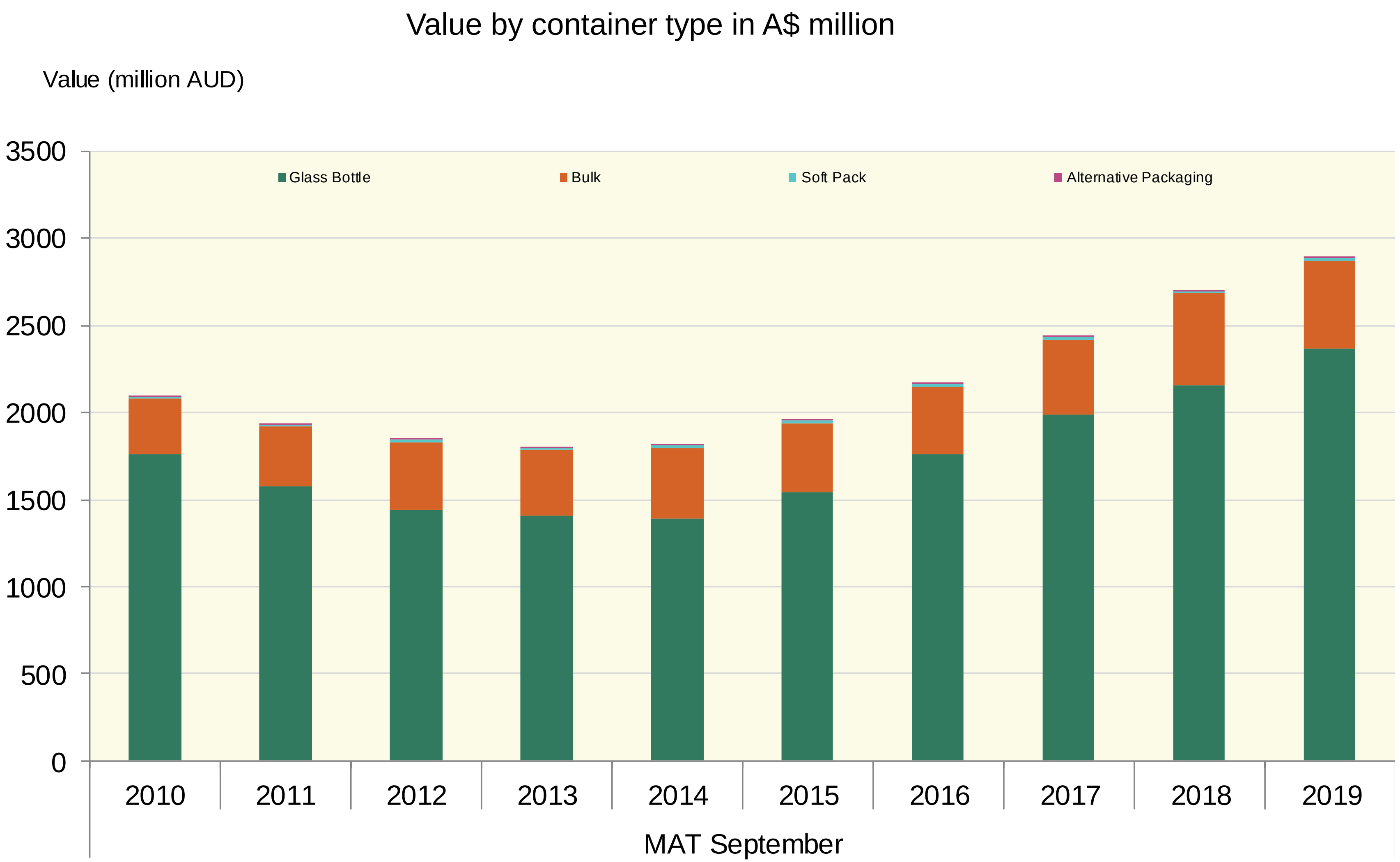
'The Wine Australia team is just back from our annual Nordic roadshow, covering Denmark, Sweden, Norway and Finland. There was a lot of interest from trade and consumer alike, with positive leads for those wineries seeking distribution being reported, and a continued focus from the three monopoly markets.'

Other markets

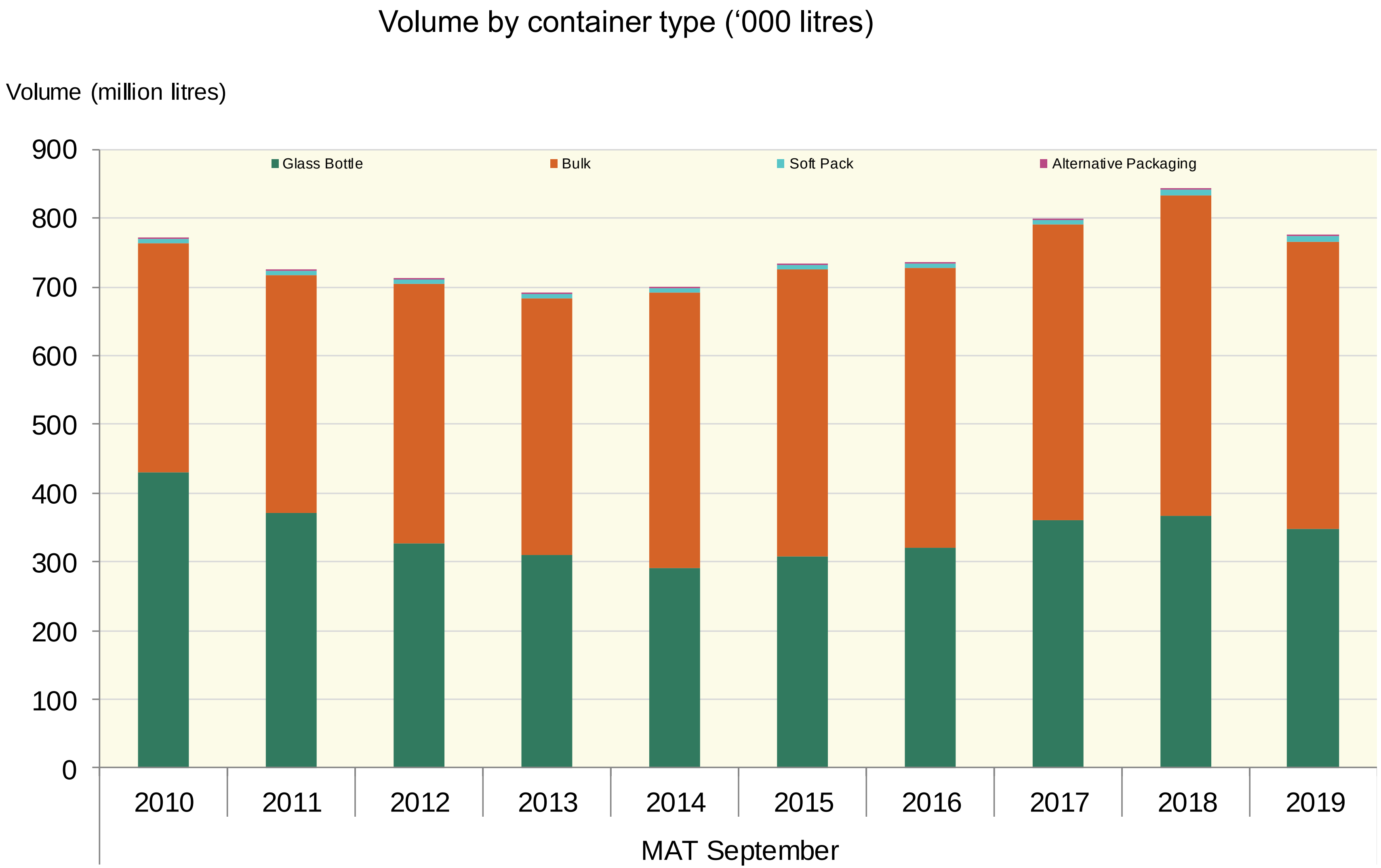
The markets discussed so far (the top 4 by value) make up 77 per cent of the value of wine exported from Australia. The other 16 of Australia's top 20 export markets have a combined 19 per cent share of value. Of these, 11 experienced positive performances in the past year and 5 contracted:

- New Zealand, up by 1 per cent to $94 million,
- Singapore, up by 1 per cent to $91 million,
- Japan, down by 7 per cent to $51 million,
- Germany, down by 12 per cent to $49 million,
- Netherlands, up 17 per cent to $44 million,
- Malaysia, up 1 per cent to $36 million,
- United Arab Emirates, up 17 per cent to $33 million,
- Denmark, up 10 per cent to $26 million,
- Thailand, down 2 per cent to $23 million,
- Sweden, down 2 per cent to $22 million,
- Taiwan, up 28 per cent to $21 million,
- South Korea, up 12 per cent to $19 million,
- Belgium, up 9 per cent to $17 million,
- Finland, down 18 per cent to $13 million,
- Philippines, up 35 per cent to $11 million, and
- France, up 18 per cent to $9.6 million.

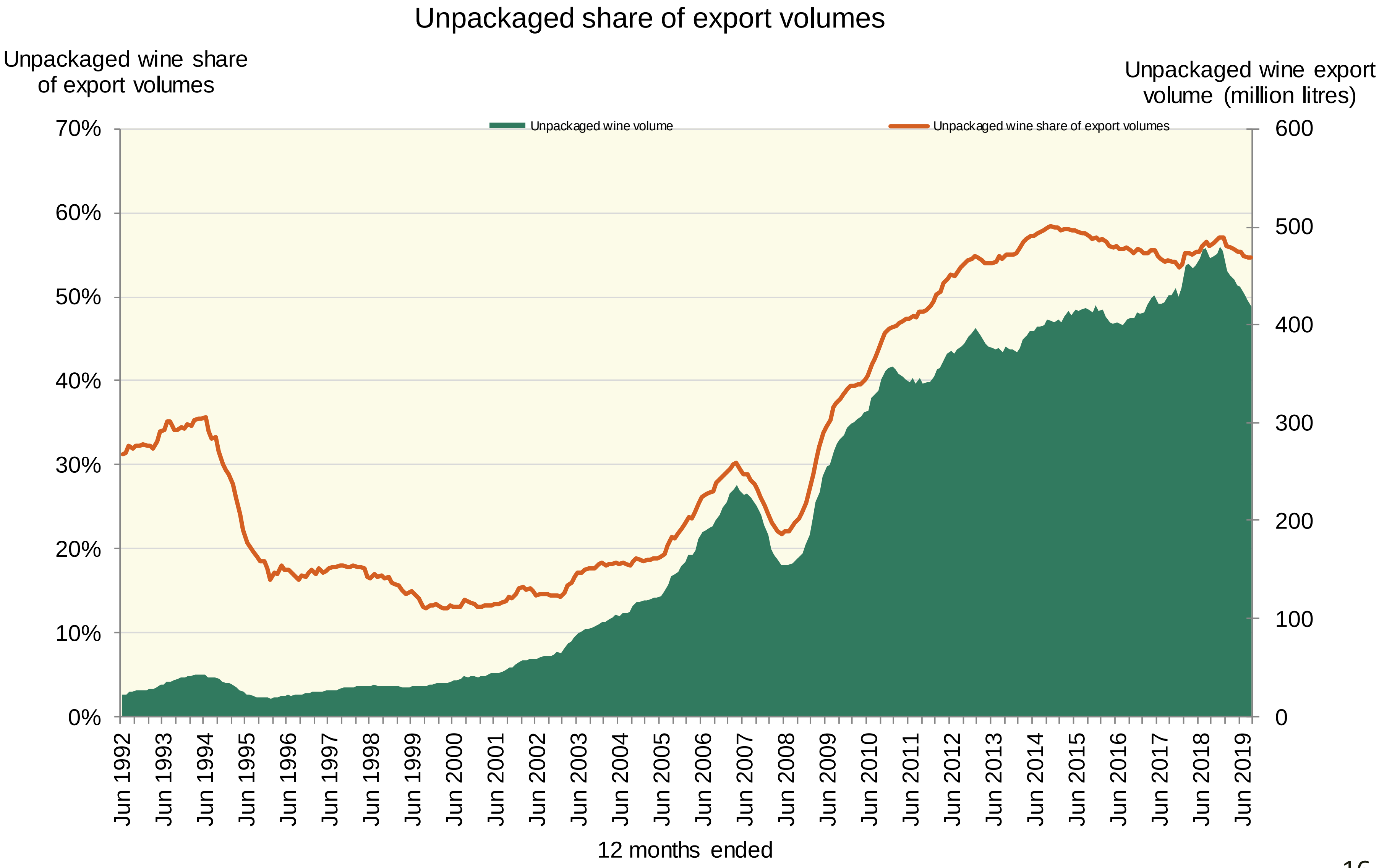
Historic overview of exports



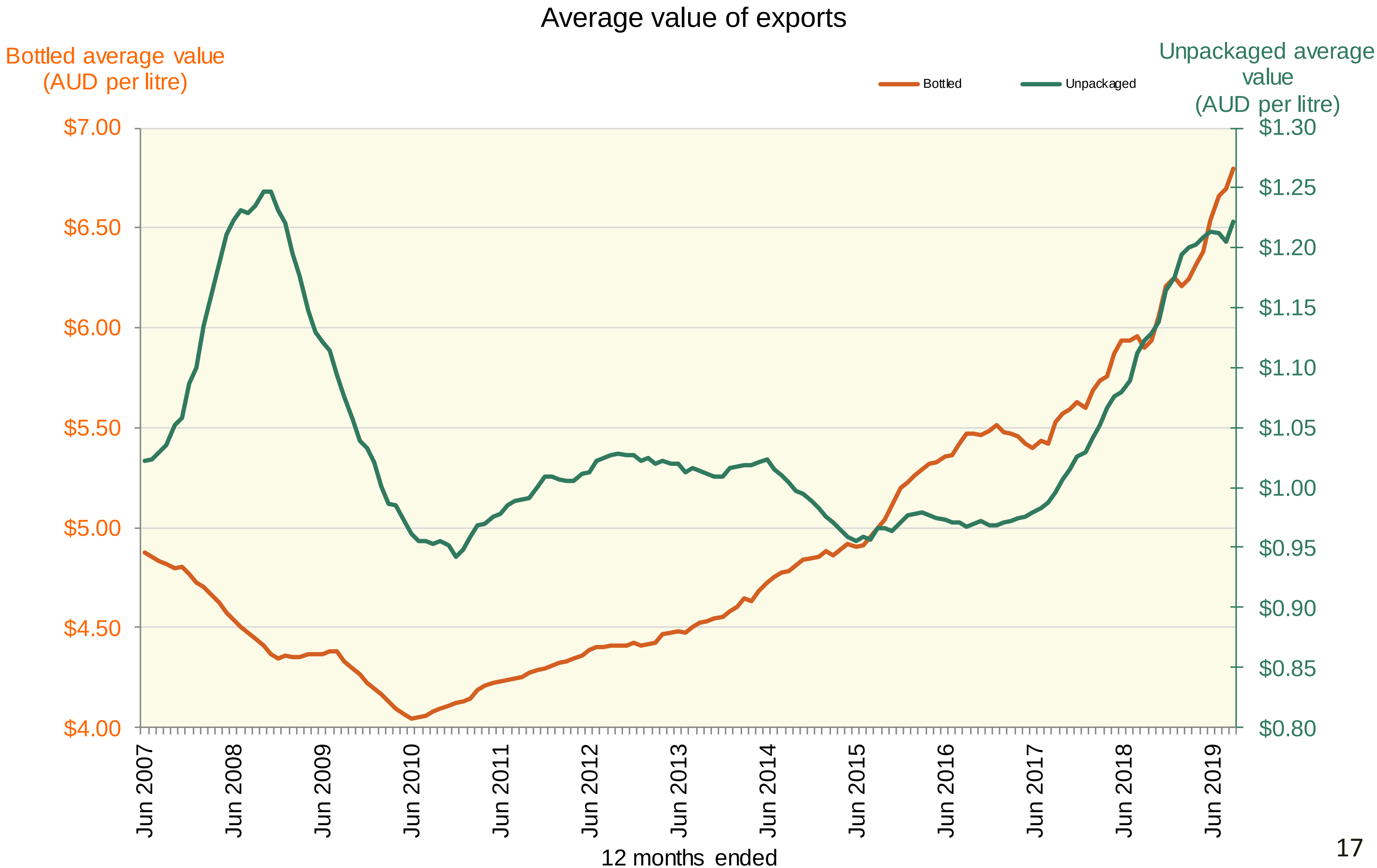
Historic overview of exports



Historic overview of exports



Historic overview of exports

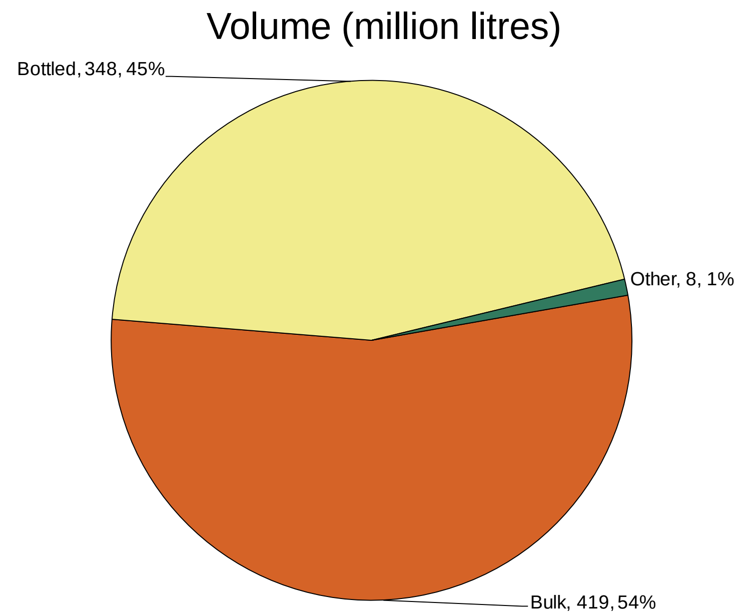


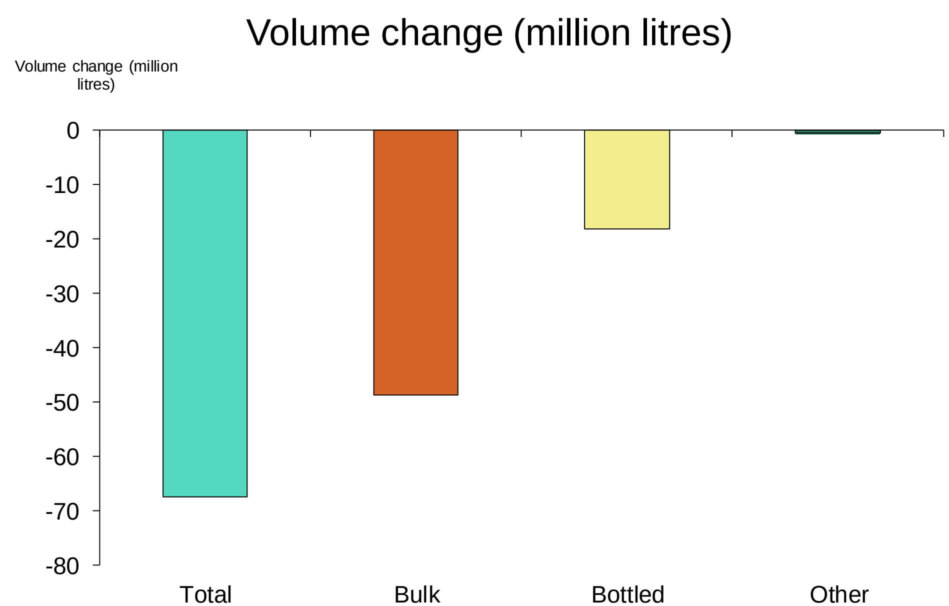
Exports by container type

MAT September 2019

		Volume (ML)	Value (A$M FOB)	Average Value (A$/L FOB)
Bottled	2019	348	2,364	6.79
	Change	-5%	9%	15%
	Share	45%	82%	
Bulk	2019	419	512	1.22
	Change	-10%	-3%	9%
	Share	54%	18%	
Other	2019	8	18	2.36
	Change	-6%	-12%	-5%
	Share	1%	1%	
Total	2019	774	2,893	3.74
	Change	-8%	7%	16%
	Share	100%	100%	

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





Wine exports
by country, container and colour

Value for MAT September 2019

	Glass Bottle Red Wine		Bulk Red Wine		Other Red Wine		Glass Bottle White Wine		Bulk White Wine		Other White Wine		Sparkling Wine		Other Wine		Total Wine	
	MAT September 2019 (A$ '000s)	Change %	MAT September 2019 (A$ '000s)	Change %	MAT September 2019 (A$ '000s)	Change %	MAT September 2019 (A$ '000s)	Change %	MAT September 2019 (A$ '000s)	Change %	MAT September 2019 (A$ '000s)	Change %	MAT September 2019 (A$ '000s)	Change %	MAT September 2019 (A$ '000s)	Change %	MAT September 2019 (A$ '000s)	Change %
China, Pr	1,028,544	24%	56,822	-27%	663	-18%	26,190	-7%	2,511	23%	72	6%	12,148	70%	5,670	28%	1,132,619	19%
United States Of America	212,312	4%	30,948	-12%	0	-100%	145,077	14%	42,221	-11%	0	-100%	4,008	6%	1,060	-81%	435,625	3%
United Kingdom	84,272	-21%	134,088	6%	11	na	59,961	-12%	80,437	10%	11	na	5,406	54%	808	-50%	364,994	-4%
Canada	99,797	-3%	16,204	-19%	278	-71%	42,942	-3%	22,779	-6%	570	-70%	3,448	-14%	2,123	21%	188,141	-6%
Hong Kong	98,445	3%	71	++	1,618	3%	8,767	30%	0	na	309	31%	3,530	++	883	20%	113,623	7%
New Zealand	52,018	0%	13,243	15%	793	12%	9,389	-17%	8,027	15%	414	-39%	5,434	-29%	5,062	++	94,379	1%
Singapore	77,285	2%	0	na	206	-39%	7,250	-2%	0	na	120	5%	6,003	2%	582	-17%	91,445	1%
Japan	17,906	-22%	5,746	14%	2,486	1%	10,578	-7%	3,497	36%	986	-3%	5,079	12%	4,452	2%	50,728	-7%
Germany, Federal Republic	10,897	-24%	18,869	-12%	0	na	1,870	-62%	17,148	14%	0	na	149	48%	6	-90%	48,939	-12%
Netherlands	15,950	37%	4,608	1%	0	na	14,746	8%	7,481	14%	0	na	1,055	26%	87	-25%	43,926	17%
Malaysia	32,534	0%	0	na	109	-4%	3,097	13%	0	na	6	-61%	216	7%	222	8%	36,183	1%
United Arab Emirates	23,435	15%	0	na	702	-4%	7,252	40%	0	na	451	-5%	762	-31%	669	8%	33,272	17%
Denmark	8,389	-10%	9,763	45%	0	na	3,102	-24%	4,420	76%	0	na	462	-47%	117	-69%	26,253	10%
Thailand	15,274	1%	741	-52%	1,231	69%	3,847	4%	295	-63%	444	-4%	1,098	-8%	170	17%	23,099	-2%
Sweden	13,393	10%	1,763	-24%	0	na	5,128	-5%	1,027	-29%	0	na	731	-40%	150	++	22,193	-2%
Taiwan	18,348	31%	0	na	371	24%	1,315	1%	0	-100%	129	7%	160	33%	286	3%	20,609	28%
Korea, R	14,796	17%	0	na	1,105	18%	2,302	-18%	0	na	61	90%	604	45%	98	-7%	18,965	12%
Belgium	4,683	34%	3,490	6%	0	na	2,925	-27%	5,825	31%	0	na	421	-28%	156	-40%	17,499	9%
Finland	4,745	-12%	3,569	-26%	0	na	1,941	-29%	2,285	-19%	0	na	289	-6%	478	++	13,307	-18%
Philippines	8,504	40%	0	na	0	na	2,162	18%	0	na	0	na	61	-8%	109	49%	10,835	35%
Rest of the world	61,883	1%	8,436	18%	1,533	-12%	24,024	-1%	4,741	-24%	1,013	-15%	3,237	-2%	1,906	-14%	106,774	-1%
World	1,903,407	12%	308,361	-6%	11,106	-3%	383,864	1%	202,693	3%	4,585	-28%	54,302	13%	25,093	-4%	2,893,411	7%

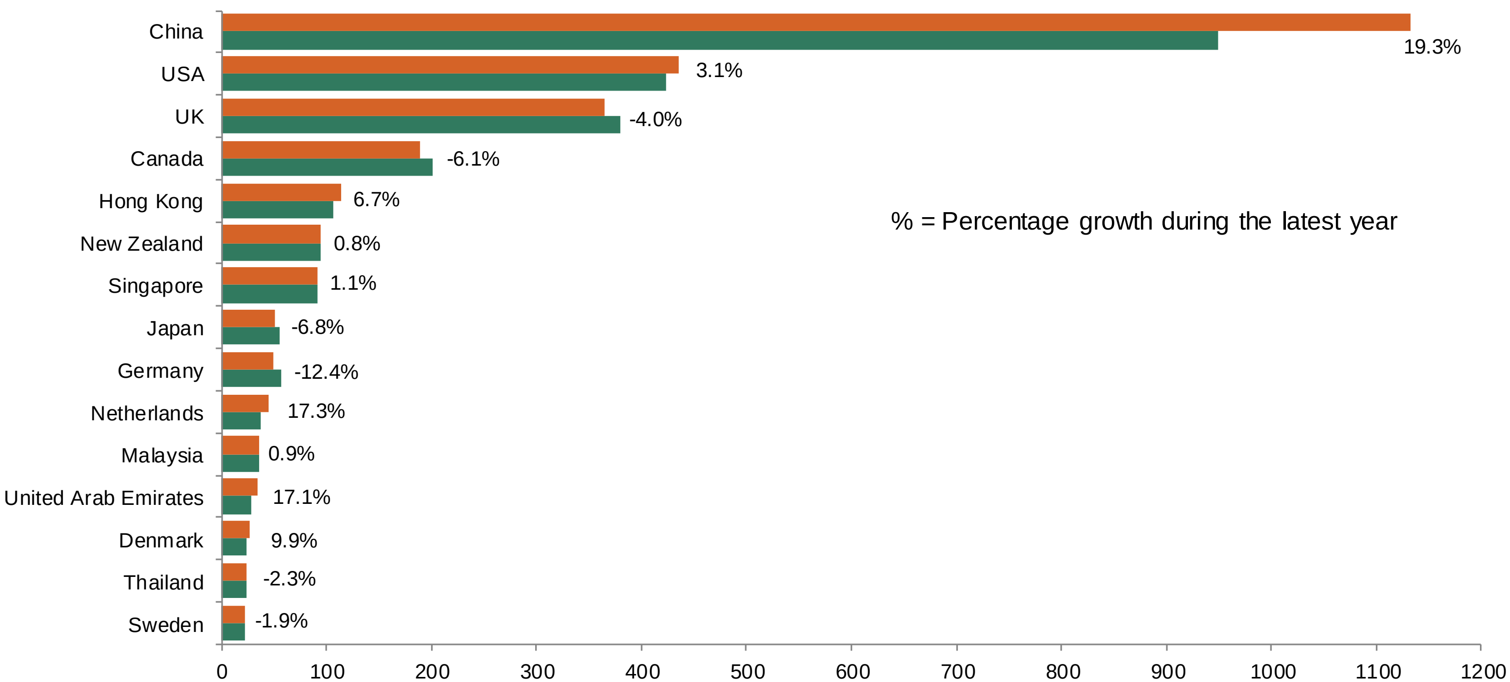
Wine exports
by country, container and colour

Volume for MAT September 2019

	Glass Bottle Red Wine		Bulk Red Wine		Other Red Wine		Glass Bottle White Wine		Bulk White Wine		Other White Wine		Sparkling Wine		Other Wine		Total Wine	
	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %
United Kingdom	17,546	-27%	113,572	-1%	2	na	16,403	-19%	83,787	8%	2	na	1,170	61%	147	-52%	232,629	-2%
United States Of America	46,421	-4%	19,515	-14%	0	-100%	38,196	6%	41,525	-20%	0	-100%	655	-13%	143	-90%	146,454	-9%
China, Pr	108,306	-1%	24,185	-52%	250	2%	4,047	-13%	1,224	-17%	21	0%	1,382	30%	744	11%	140,159	-16%
Canada	15,795	-8%	12,742	-32%	75	-66%	8,731	-7%	21,715	-8%	156	-63%	571	-16%	392	11%	60,178	-15%
Germany, Federal Republic	2,249	-36%	12,705	-21%	0	na	370	-73%	17,056	4%	0	na	14	++	0	-98%	32,394	-13%
New Zealand	10,065	-1%	7,513	-1%	385	25%	2,964	-19%	8,893	4%	199	-11%	1,035	-29%	987	++	32,040	-1%
Netherlands	4,062	17%	3,317	-14%	0	na	4,168	5%	7,303	0%	0	na	213	-11%	9	-81%	19,071	1%
Japan	3,304	-12%	4,426	9%	1,325	-10%	1,981	-3%	3,291	22%	615	2%	1,050	8%	854	-5%	16,846	2%
Denmark	1,203	-21%	6,954	25%	0	na	762	-24%	4,262	59%	0	na	98	-49%	9	-88%	13,287	20%
Belgium	625	24%	2,632	-10%	0	na	514	-30%	6,024	19%	0	na	62	-46%	26	-31%	9,883	5%
Hong Kong	5,817	0%	48	98%	587	0%	1,036	15%	0	na	123	25%	132	-13%	75	14%	7,818	2%
Singapore	4,759	3%	0	na	110	-42%	919	0%	0	na	61	62%	685	9%	72	1%	6,605	2%
France	115	-28%	2,765	-11%	8	85%	70	19%	2,699	64%	7	++	0	-75%	0	-100%	5,665	14%
Sweden	2,609	9%	906	-36%	0	na	1,402	-6%	528	-29%	0	na	197	-38%	21	++	5,662	-11%
Finland	655	-24%	2,088	-37%	0	na	386	-33%	2,094	-28%	0	na	29	-48%	101	74%	5,353	-31%
Thailand	2,188	27%	552	-53%	630	71%	823	4%	264	-69%	221	-9%	167	-5%	37	11%	4,882	-9%
United Arab Emirates	1,885	-3%	0	na	394	-10%	1,349	54%	0	na	285	-13%	103	-34%	173	-1%	4,190	7%
Malaysia	2,390	-21%	0	na	63	2%	496	-1%	0	na	3	-45%	29	-3%	37	9%	3,018	-18%
Korea, R	1,929	12%	0	na	514	13%	360	-27%	0	na	22	74%	81	34%	12	-31%	2,918	6%
Ireland	1,033	-29%	233	++	0	na	1,037	-33%	208	++	0	na	18	-54%	1	-86%	2,530	-18%
Rest of the world	12,082	5%	2,168	6%	794	-6%	4,955	3%	1,322	-77%	497	-17%	580	16%	480	-14%	22,878	-14%
World	245,037	-5%	216,319	-16%	5,137	-1%	90,968	-5%	202,193	-3%	2,213	-15%	8,272	-1%	4,321	-19%	774,461	-8%

Exports
by top 15 destinations

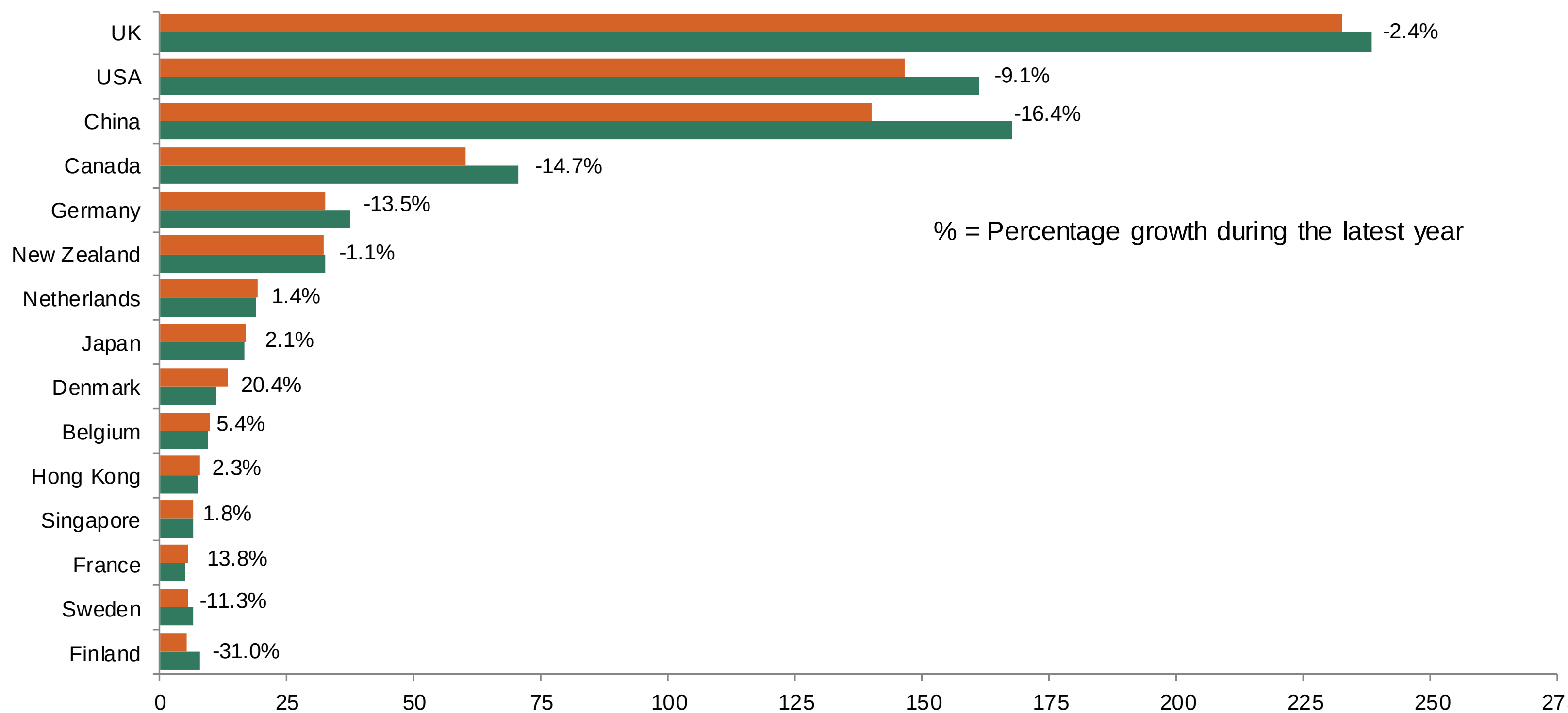
Value (million A$) for MAT September 2019



	Sweden	Thailand	Denmark	United Arab Emirates	Malaysia	Netherlands	Germany	Japan	Singapore	New Zealand	Hong Kong	Canada	UK	USA	China
2019	22.2	23.1	26.3	33.3	36.2	43.9	48.9	50.7	91.4	94.4	113.6	188.1	365.0	435.6	1132.6
2018	22.6	23.7	23.9	28.4	35.8	37.4	55.9	54.4	90.4	93.6	106.5	200.3	380.1	422.7	949.1

Exports
by top 15 destinations

Volume (million litres) for MAT September 2019

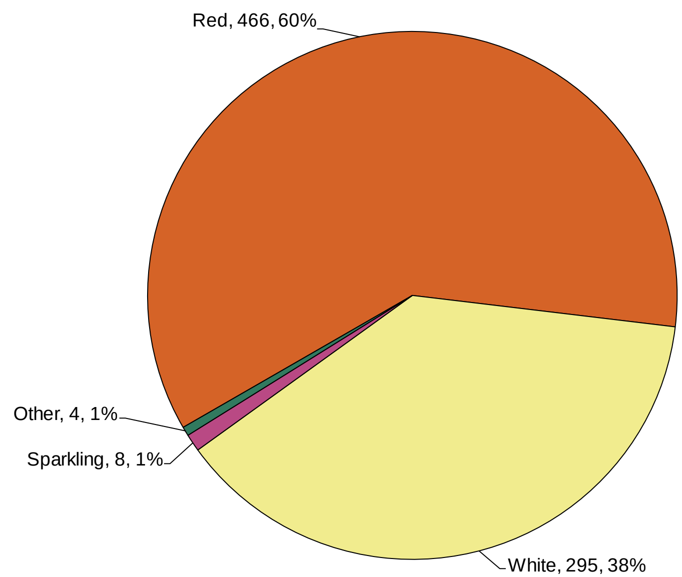


	Finland	Sweden	France	Singapore	Hong Kong	Belgium	Denmark	Japan	Netherlands	New Zealand	Germany	Canada	China	USA	UK
2019	5.4	5.7	5.7	6.6	7.8	9.9	13.3	16.8	19.1	32.0	32.4	60.2	140.2	146.5	232.6
2018	7.8	6.4	5.0	6.5	7.6	9.4	11.0	16.5	18.8	32.4	37.4	70.5	167.7	161.2	238.4

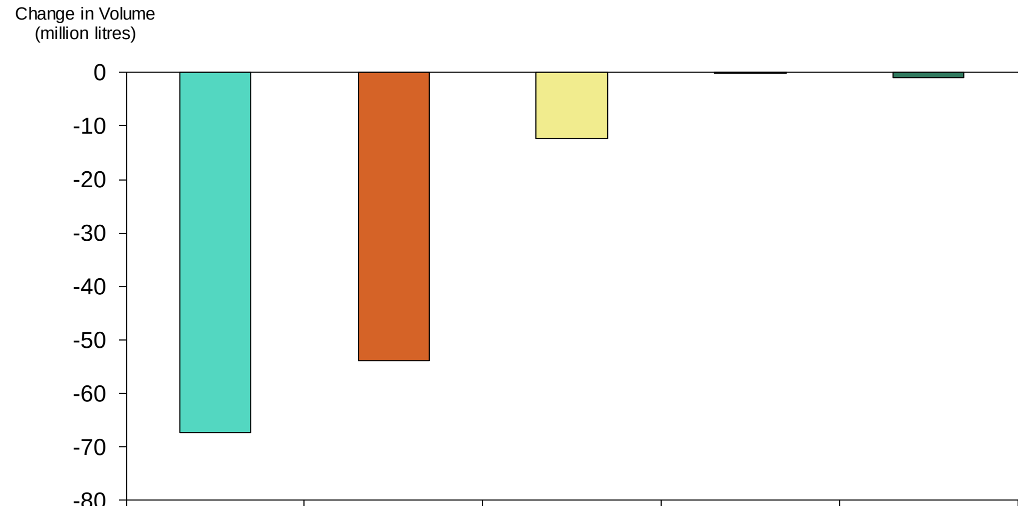
Exports by colour/ wine style

MAT September 2019

Volume (million litres)



Change in volume (million litres)



	Total exports	Red	White	Sparkling	Other
% change	-8%	-10.4%	-4.0%	-0.5%	-19%
Vol change	-67.5	-54.0	-12.4	0.0	-1.0

Bottled wine exports report

Bottled exports by price point and destination

Value (‘000 A$) for MAT September 2019

	$2.49 and under		$2.50 to $4.99		$5.00 to $7.49		$7.50 to $9.99		$10.00 to $19.99		$20.00 to $49.99		$50.00 and above		Total	
	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %
China	4,294	-54%	198,244	-11%	150,350	6%	57,160	0%	190,972	50%	266,923	69%	204,448	35%	1,072,391	24%
USA	8,881	-12%	265,608	5%	22,261	0%	18,888	24%	29,726	14%	12,383	29%	4,709	35%	362,456	7%
UK	2,402	-65%	89,076	-21%	24,245	3%	13,269	10%	13,488	-18%	5,681	-1%	2,066	-4%	150,227	-17%
Canada	103	-93%	39,408	-11%	64,566	-3%	18,444	8%	22,469	9%	2,568	-11%	677	-21%	148,233	-3%
New Zealand	1,396	-42%	36,602	2%	17,968	-4%	8,438	8%	5,424	-13%	1,235	-20%	834	-26%	71,898	-2%
Netherlands	1,356	-78%	21,067	69%	6,558	31%	1,414	45%	1,036	-2%	290	-14%	97	-45%	31,818	21%
Hong Kong	19	-72%	10,521	19%	8,128	0%	3,699	-37%	20,722	13%	19,863	-17%	48,641	24%	111,592	7%
Japan	296	-62%	17,966	-2%	4,788	-13%	4,296	28%	5,818	2%	2,105	-23%	480	-90%	35,749	-13%
Singapore	223	-26%	7,815	23%	5,788	-11%	8,664	41%	13,824	-15%	26,977	-1%	27,814	3%	91,105	1%
Sweden	386	-66%	11,146	9%	2,795	-18%	3,079	44%	1,411	3%	458	-3%	128	38%	19,403	3%
United Arab Emirates	21	-15%	6,850	27%	5,019	-4%	2,492	1%	2,965	-14%	5,389	12%	9,236	64%	31,972	18%
Thailand	191	-56%	8,270	52%	2,220	-21%	1,817	-11%	1,726	-26%	3,536	-7%	2,629	-20%	20,389	1%
Malaysia	73	-43%	4,851	0%	3,124	-56%	1,776	7%	4,217	6%	11,676	15%	10,350	32%	36,067	1%
Germany	2,532	-33%	2,734	-62%	2,357	-3%	1,396	-17%	2,617	-14%	839	13%	447	-6%	12,921	-33%
Korea, R	9	DNE	3,486	-12%	5,117	19%	1,780	13%	4,224	13%	1,966	14%	1,215	98%	17,797	12%
Ireland	779	-65%	4,414	-22%	1,312	35%	324	-32%	1,072	150%	186	18%	30	2%	8,117	-18%
Philippines	21	-69%	6,747	23%	1,464	65%	434	108%	341	-38%	636	57%	1,191	170%	10,835	35%
Denmark	605	-51%	3,287	-20%	1,626	-47%	1,799	-17%	2,977	17%	1,375	11%	400	24%	12,070	-18%
Taiwan	48	249%	4,625	3%	1,707	17%	690	-6%	2,420	31%	4,932	54%	5,688	45%	20,110	28%
India	52	200%	6,535	-8%	404	-17%	40	-51%	169	-69%	46	-74%	6	-98%	7,252	-16%
Other	1,127	-37%	28,122	-9%	21,623	25%	9,940	5%	17,312	0%	7,296	4%	5,785	7%	91,206	2%
Total	24,815	-49%	777,375	-4%	353,421	2%	159,838	6%	344,930	23%	376,360	42%	326,869	27%	2,363,609	9%

Bottled exports by price point and destination

Volume ('000 litres) for MAT September 2019

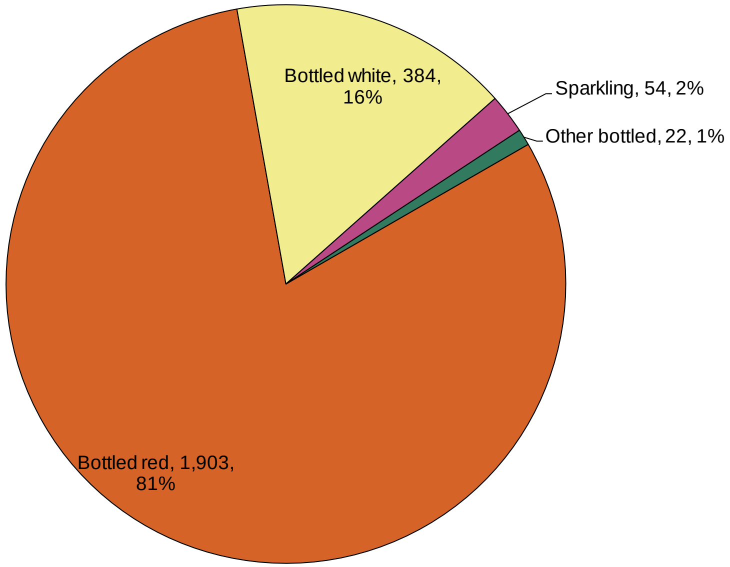
	$2.49 and under		$2.50 to $4.99		$5.00 to $7.49		$7.50 to $9.99		$10.00 to $19.99		$20.00 to $49.99		$50.00 and above		Total	
	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %
China	1,978	-54%	53,111	-15%	25,590	6%	6,589	0%	15,207	54%	9,645	59%	2,329	22%	114,449	-1%
USA	3,697	-14%	72,918	-2%	3,811	-1%	2,168	23%	2,313	18%	453	26%	55	25%	85,415	-2%
UK	1,055	-64%	27,082	-23%	4,123	4%	1,529	10%	1,085	-18%	199	0%	25	23%	35,100	-22%
Canada	52	-91%	10,680	-10%	10,582	-5%	2,158	8%	1,899	8%	91	-9%	8	-17%	25,471	-7%
New Zealand	588	-43%	10,002	-1%	2,970	-3%	984	9%	447	-12%	46	-19%	12	-25%	15,049	-4%
Netherlands	559	-83%	6,550	97%	1,077	23%	170	45%	81	-2%	10	-18%	1	-19%	8,448	10%
Hong Kong	11	-78%	2,592	16%	1,305	-2%	431	-36%	1,610	11%	696	-18%	406	20%	7,051	2%
Japan	127	-64%	4,900	-4%	818	-9%	493	27%	451	3%	77	-19%	6	-90%	6,872	-6%
Singapore	102	-31%	1,888	18%	968	-7%	1,027	46%	1,074	-17%	1,035	-8%	337	-4%	6,431	3%
Sweden	166	-65%	3,126	10%	464	-16%	347	45%	109	10%	15	-10%	1	14%	4,228	0%
United Arab Emirates	9	-11%	1,717	21%	880	4%	298	3%	253	-11%	200	8%	104	65%	3,461	12%
Thailand	78	-58%	2,250	53%	360	-19%	214	-12%	141	-27%	142	-9%	30	-24%	3,215	18%
Malaysia	33	-40%	1,250	-3%	529	-57%	198	4%	344	9%	471	9%	127	53%	2,952	-18%
Germany	1,113	-41%	725	-66%	402	-7%	163	-18%	199	-16%	27	4%	3	-7%	2,634	-46%
Korea, R	5	DNE	908	-10%	885	16%	205	11%	302	11%	64	9%	12	122%	2,382	4%
Ireland	333	-70%	1,383	-17%	232	40%	37	-33%	96	157%	8	62%	0	10%	2,089	-31%
Philippines	9	-69%	1,701	19%	260	70%	50	104%	26	-37%	23	43%	15	180%	2,083	22%
Denmark	312	-51%	1,012	-13%	262	-47%	203	-21%	232	19%	46	8%	4	28%	2,071	-26%
Taiwan	24	287%	1,121	1%	284	11%	80	-9%	179	37%	174	47%	61	59%	1,923	10%
India	26	244%	1,664	-16%	70	-19%	5	-53%	15	-67%	2	-72%	0	-100%	1,782	-17%
Other	511	-39%	7,733	-7%	3,742	28%	1,163	6%	1,370	1%	266	6%	67	6%	14,851	0%
Total	10,788	-52%	214,315	-8%	59,615	1%	18,512	6%	27,434	25%	13,685	35%	3,606	18%	347,956	-5%

Bottled exports by colour/ wine style

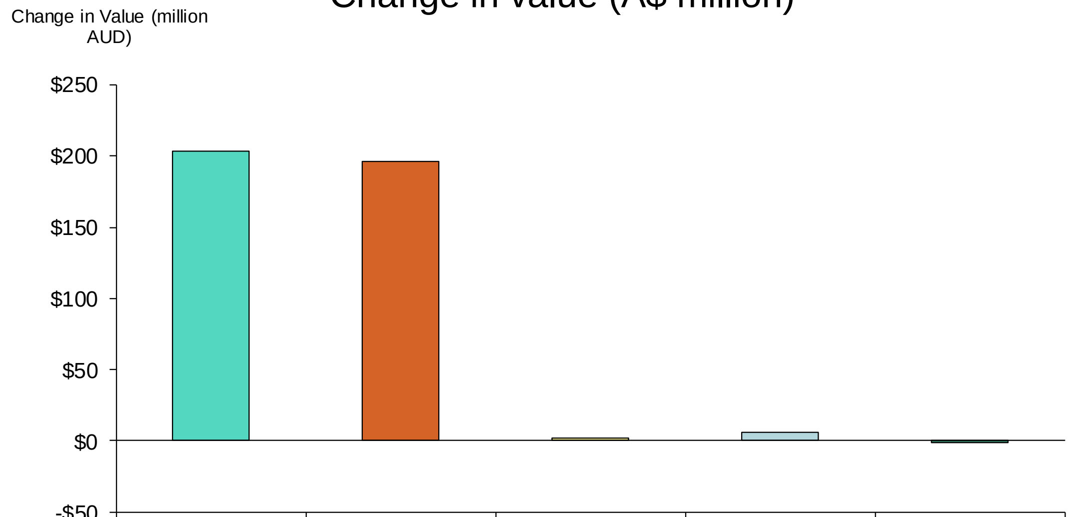
Value

MAT September 2019

Value (A$ million)



Change in value (A$ million)

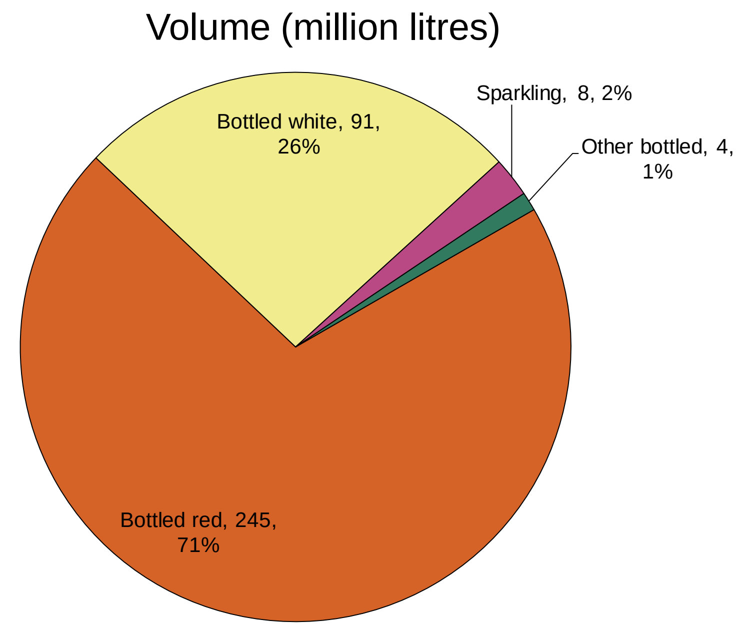


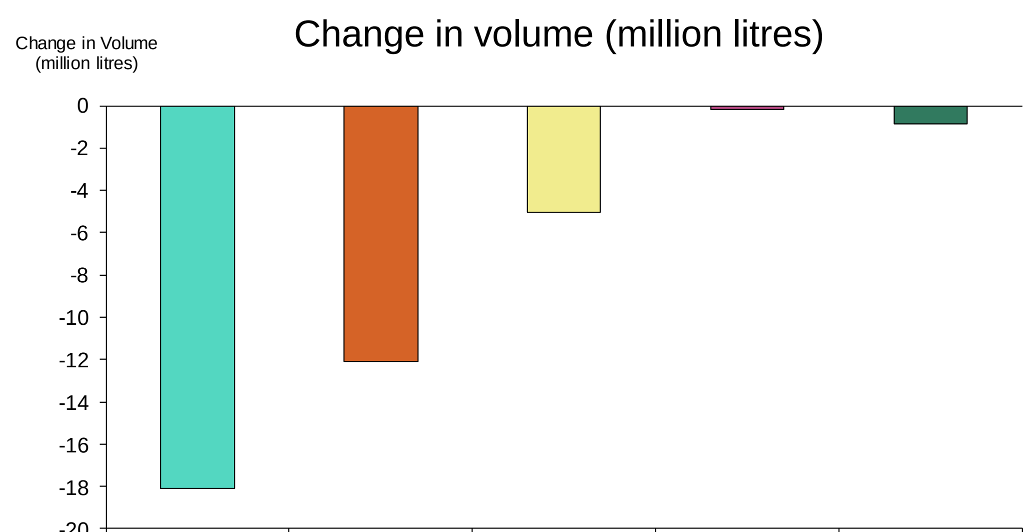
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	9.4%	11.5%	0.5%	12.5%	-3.9%
Vol change	203.4	196.3	1.9	6.0	-0.9

Bottled exports by colour/ wine style

Volume

MAT September 2019





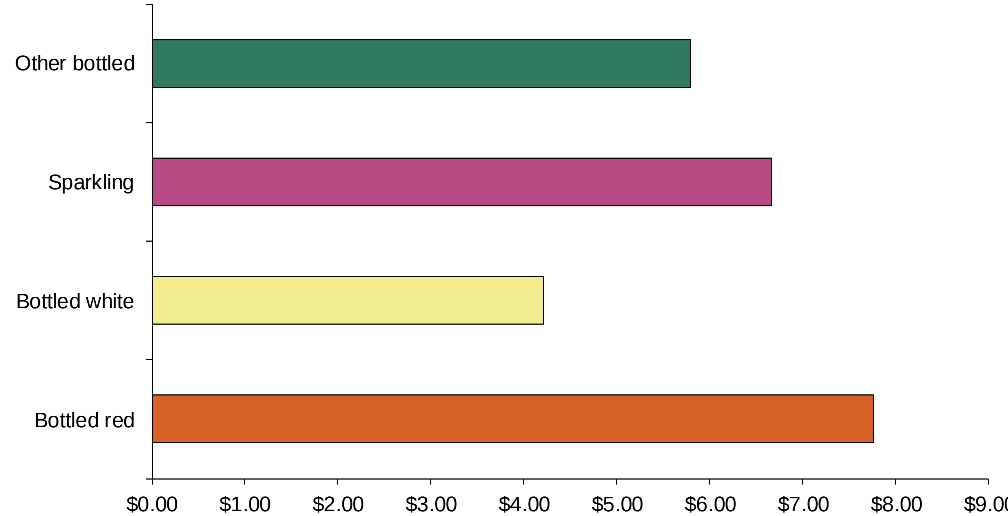
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	-4.9%	-4.7%	-5.2%	-2.1%	-18.3%
Vol change	-18.1	-12.1	-5.0	-0.2	-0.9

Bottled exports by colour/ wine style

Average value

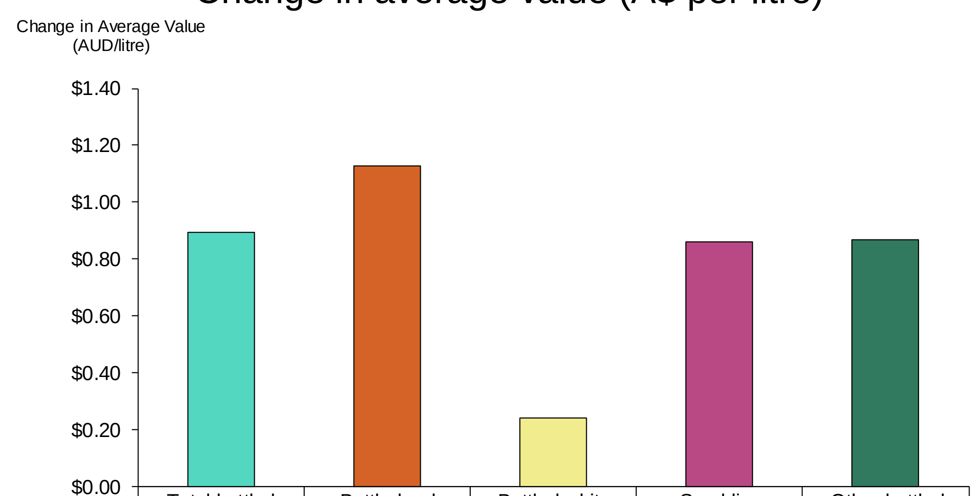
MAT September 2019

Average value (A$ per litre)



	Bottled red	Bottled white	Sparkling	Other bottled
2019	$7.77	$4.22	$6.66	$5.80

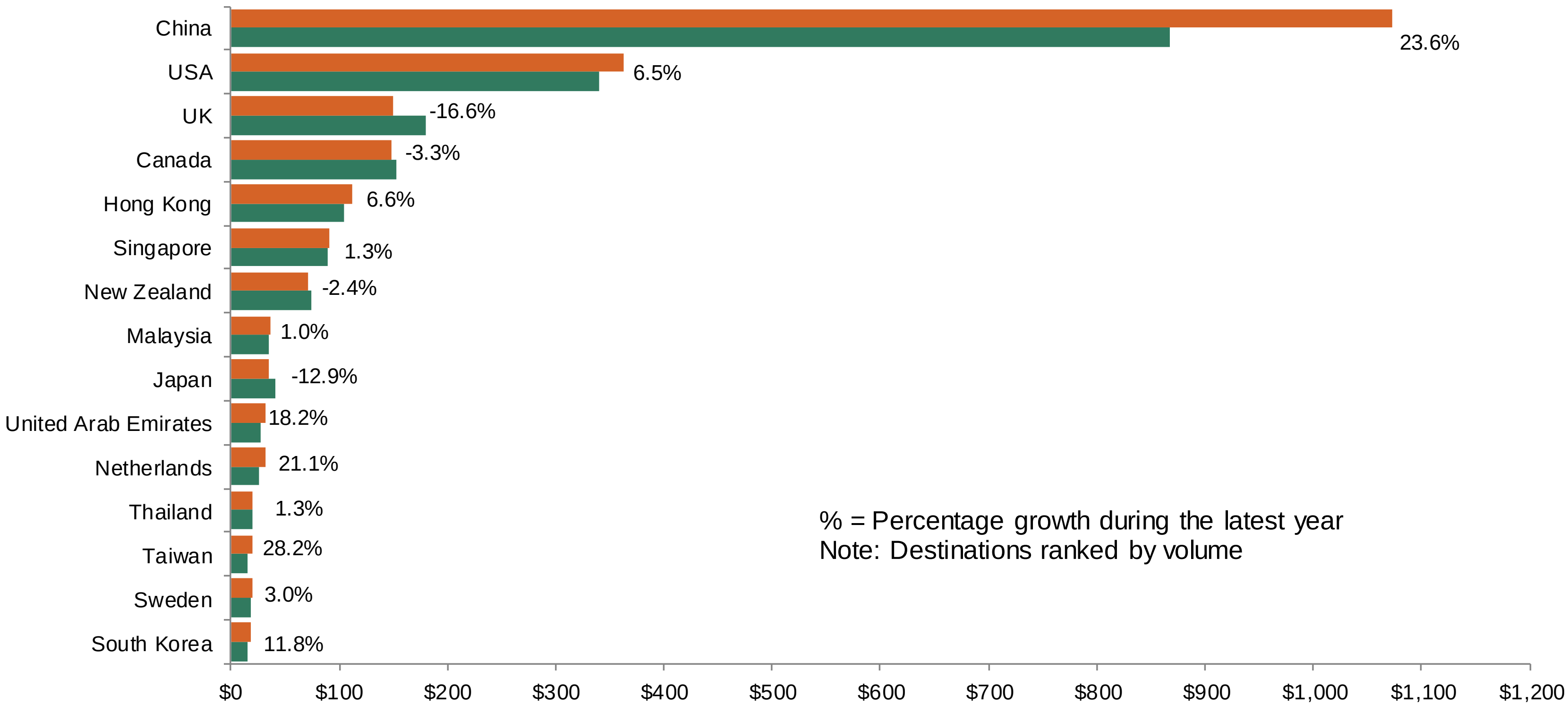
Change in average value (A$ per litre)



	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	15.1%	17.0%	6.1%	14.8%	17.5%
Av. Val change	$0.89	$1.13	$0.24	$0.86	$0.87

Bottled exports by top 15 destinations

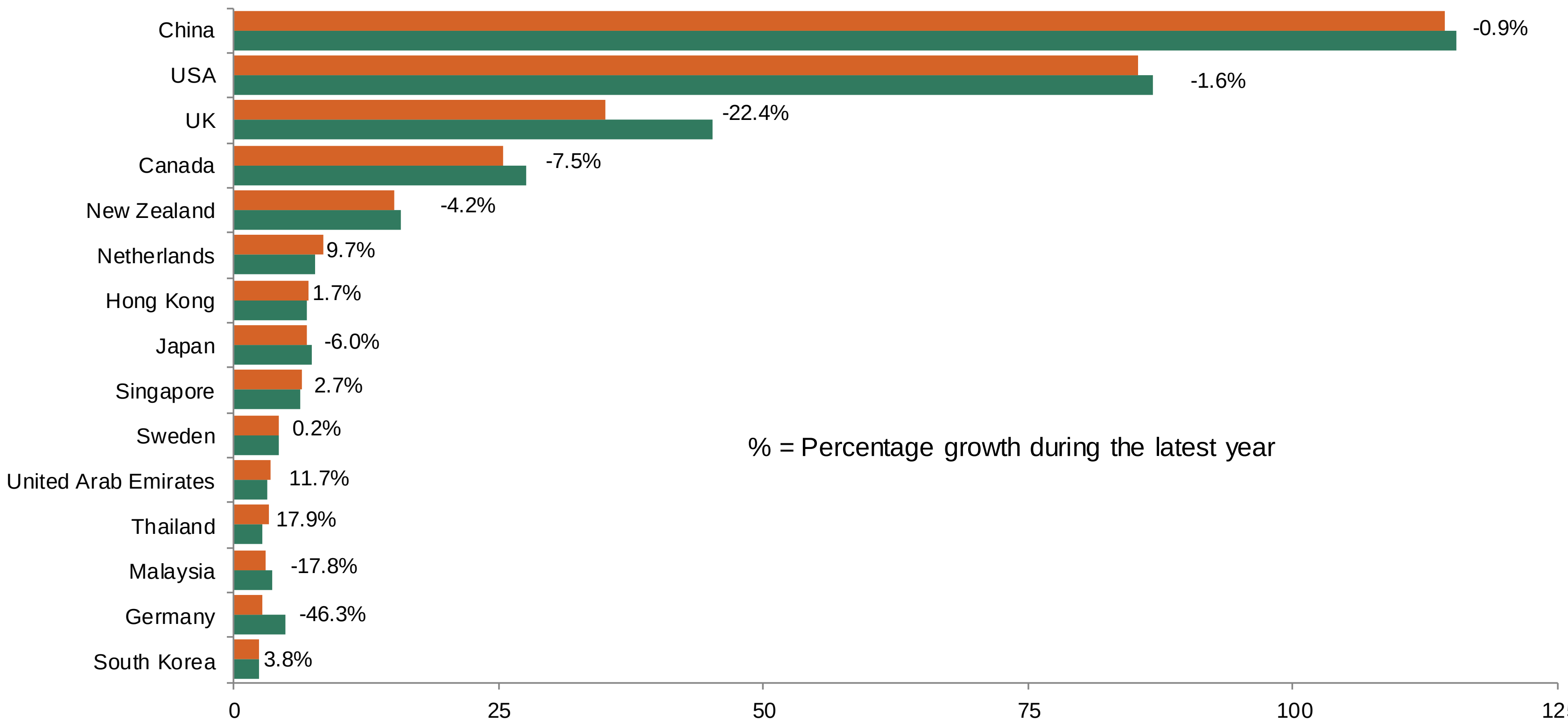
Value (million A$) for MAT September 2019



	South Korea	Sweden	Taiwan	Thailand	Netherlands	United Arab Emirates	Japan	Malaysia	New Zealand	Singapore	Hong Kong	Canada	UK	USA	China
2019	17.8	19.4	20.1	20.4	31.8	32.0	35.7	36.1	71.9	91.1	111.6	148.2	150.2	362.5	1072.4
2018	15.9	18.8	15.7	20.1	26.3	27.0	41.0	35.7	73.7	90.0	104.7	153.2	180.1	340.2	867.9

Bottled exports by top 15 destinations

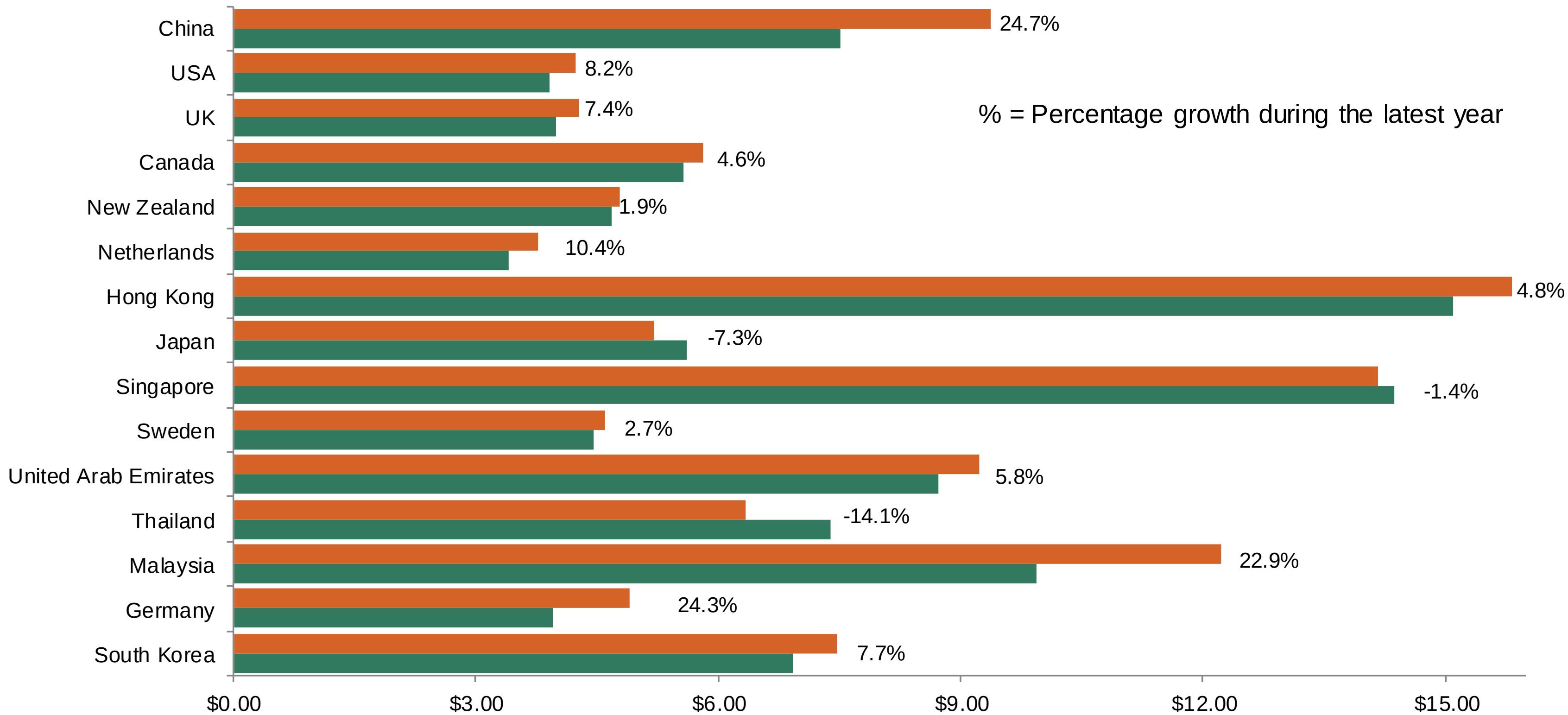
Volume (million litres) for MAT September 2019



	South Korea	Germany	Malaysia	Thailand	United Arab Emirates	Sweden	Singapore	Japan	Hong Kong	Netherlands	New Zealand	Canada	UK	USA	China
2019	2.4	2.6	3.0	3.2	3.5	4.2	6.4	6.9	7.1	8.4	15.0	25.5	35.1	85.4	114.4
2018	2.3	4.9	3.6	2.7	3.1	4.2	6.3	7.3	6.9	7.7	15.7	27.5	45.2	86.8	115.5

Bottled exports by top 15 destinations

Average value (A$ per litre) for MAT September 2019



	South Korea	Germany	Malaysia	Thailand	United Arab Emirates	Sweden	Singapore	Japan	Hong Kong	Netherlands	New Zealand	Canada	UK	USA	China
2019	$7.47	$4.91	$12.22	$6.34	$9.24	$4.59	$14.17	$5.20	$15.83	$3.77	$4.78	$5.82	$4.28	$4.24	$9.37
2018	$6.93	$3.95	$9.95	$7.39	$8.73	$4.47	$14.37	$5.61	$15.10	$3.41	$4.69	$5.57	$3.98	$3.92	$7.51

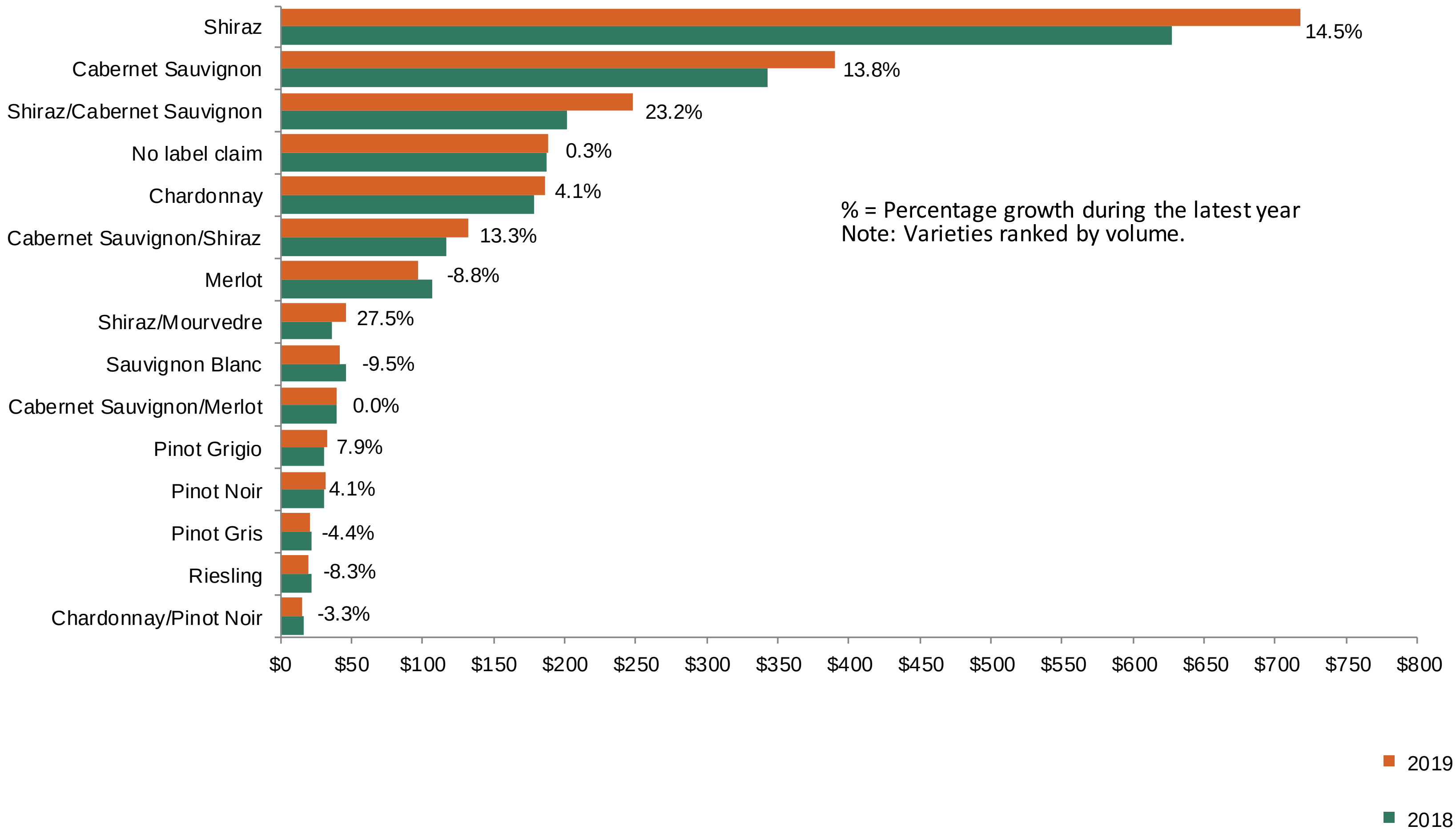
Bottled exports by top 15 variety label claims

MAT September 2019

Top 15 variety label claims	Volume (million litres)		Value (A$ million FOB)		Average value ($A per litre FOB)	
	2019	Change	2019	Change	2019	Change
Shiraz	85.39	-4%	717.67	14%	8.40	19%
Cabernet Sauvignon	50.63	-2%	389.82	14%	7.70	16%
Chardonnay	45.31	-2%	186.14	4%	4.11	24%
No label claim	37.88	-5%	188.26	0%	4.97	6%
Shiraz/Cabernet Sauvignon	32.32	0%	248.21	23%	7.68	6%
Merlot	22.92	-17%	97.39	-9%	4.25	12%
Sauvignon Blanc	11.36	-14%	41.77	-10%	3.68	9%
Cabernet Sauvignon/Merlot	8.22	-6%	39.81	0%	4.84	13%
Pinot Grigio	8.12	-3%	33.40	8%	4.11	6%
Pinot Gris	6.11	-8%	21.35	-4%	3.49	6%
Cabernet Sauvignon/Shiraz	5.59	1%	132.66	13%	23.74	11%
Pinot Noir	4.95	-6%	31.89	4%	6.44	11%
Riesling	3.22	-12%	19.65	-8%	6.10	4%
Chardonnay/Pinot Noir	2.90	-5%	15.77	-3%	5.43	4%
Shiraz/Mourvedre	2.01	13%	46.17	27%	22.96	1%

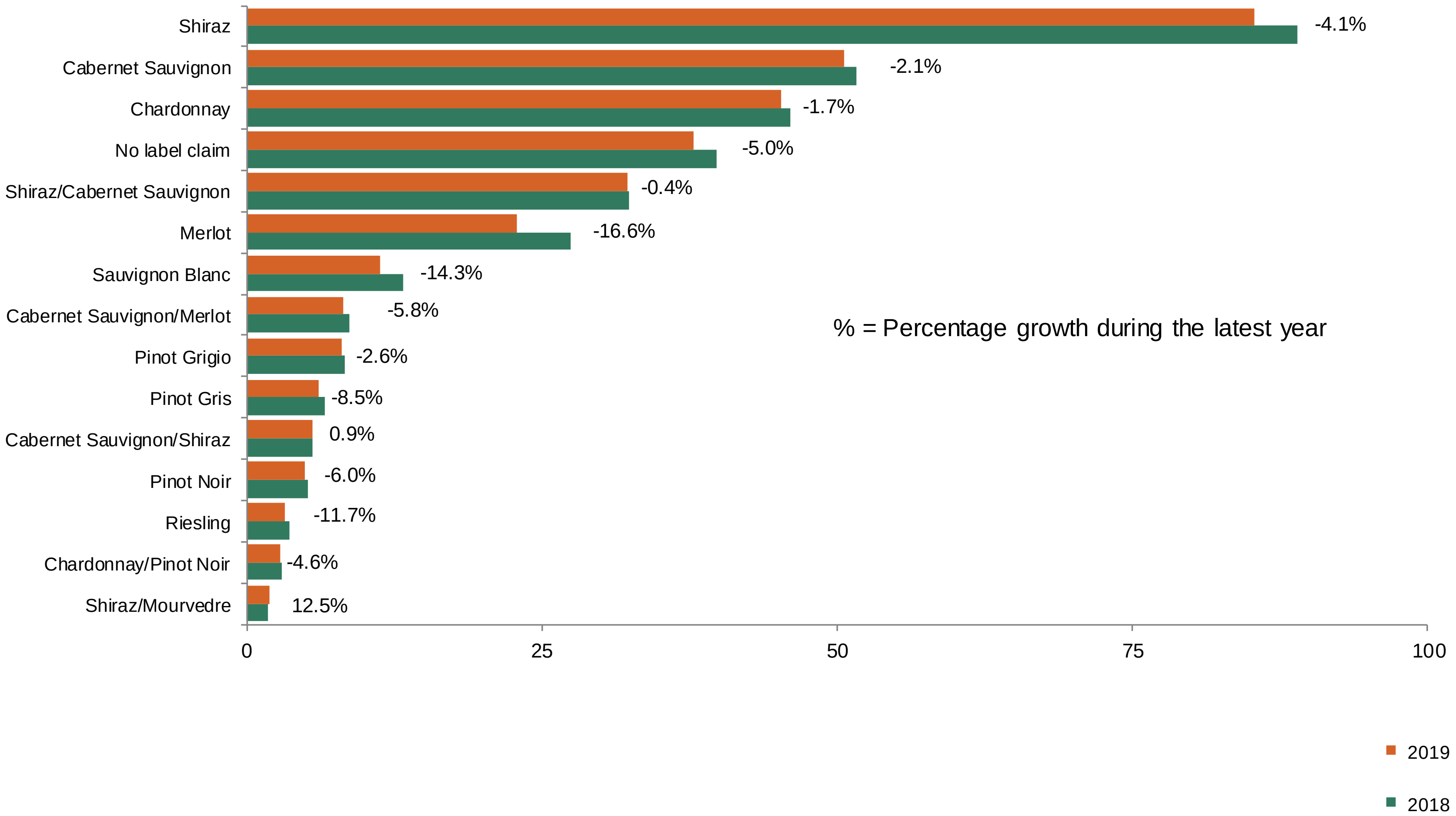
Bottled exports by top 15 variety label claims

Value (million A$) for MAT September 2019



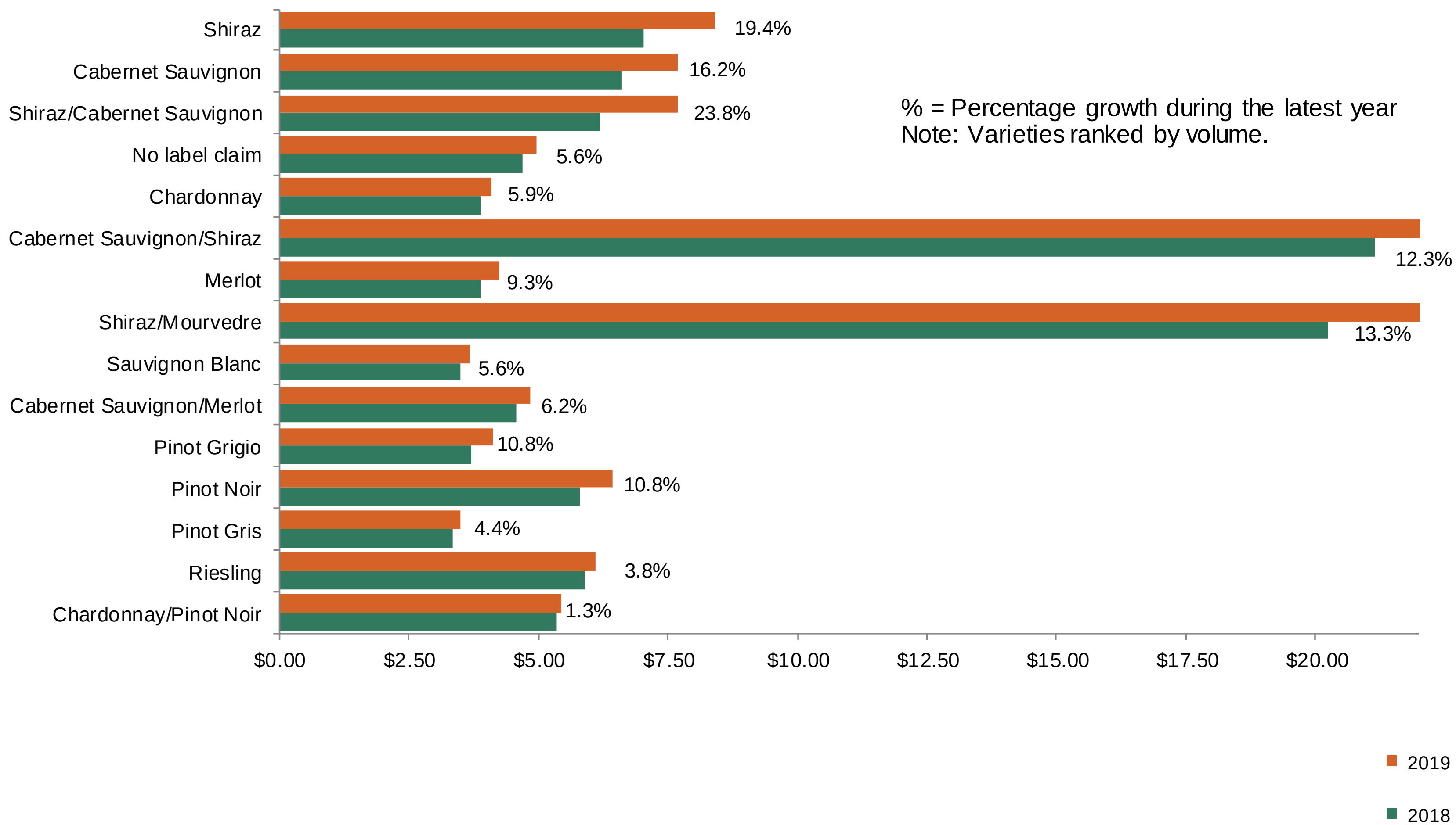
Bottled exports by top 15 variety label claims

Volume (million litres) for MAT September 2019



Bottled exports by top 15 variety label claims

Average Value (A$ per litre) for MAT September 2019



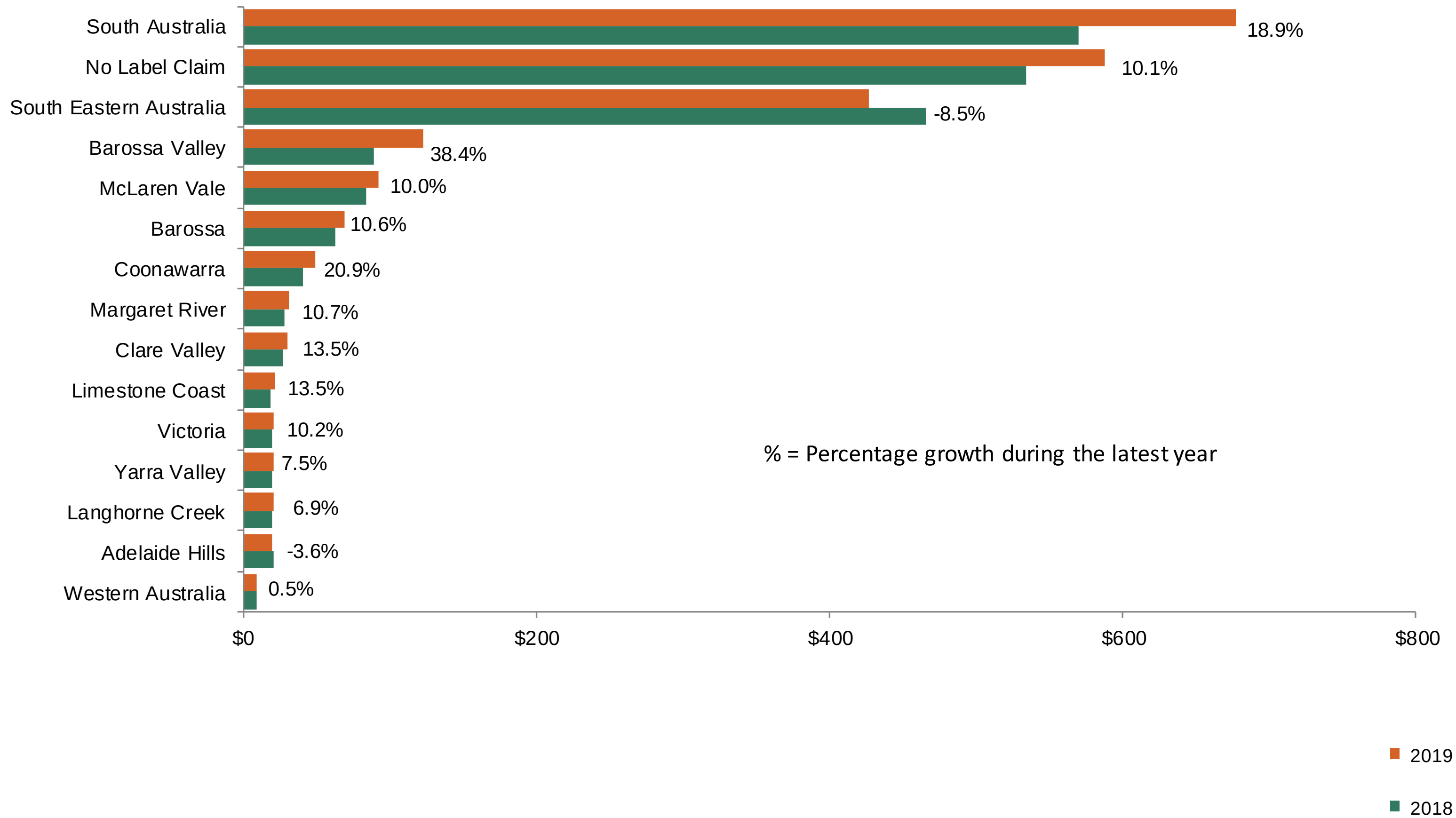
Bottled exports by top 15 GI region label claims

MAT September 2019

Top 15 GI label claims	Volume (million litres)		Value (A$ million FOB)		Average value ($A per litre FOB)	
	2019	Change	2019	Change	2019	Change
South Australia	64.79	4%	677.48	19%	10.46	14%
No Label Claim	109.21	-1%	587.96	10%	5.38	11%
South Eastern Australia	115.33	-14%	426.46	-8%	3.70	6%
Barossa Valley	5.81	18%	122.62	38%	21.12	17%
McLaren Vale	7.88	9%	92.53	10%	11.74	1%
Barossa	5.36	-2%	69.07	11%	12.88	13%
Coonawarra	3.21	-7%	49.48	21%	15.40	30%
Margaret River	2.52	7%	31.51	11%	12.50	4%
Clare Valley	3.33	1%	30.14	13%	9.05	12%
Limestone Coast	3.23	3%	21.43	14%	6.64	10%
Victoria	3.16	2%	21.14	10%	6.68	8%
Yarra Valley	1.23	-7%	20.79	7%	16.96	16%
Langhorne Creek	2.39	10%	20.40	7%	8.55	-3%
Adelaide Hills	1.84	-7%	19.45	-4%	10.55	4%
Western Australia	1.37	-3%	9.47	1%	6.92	4%

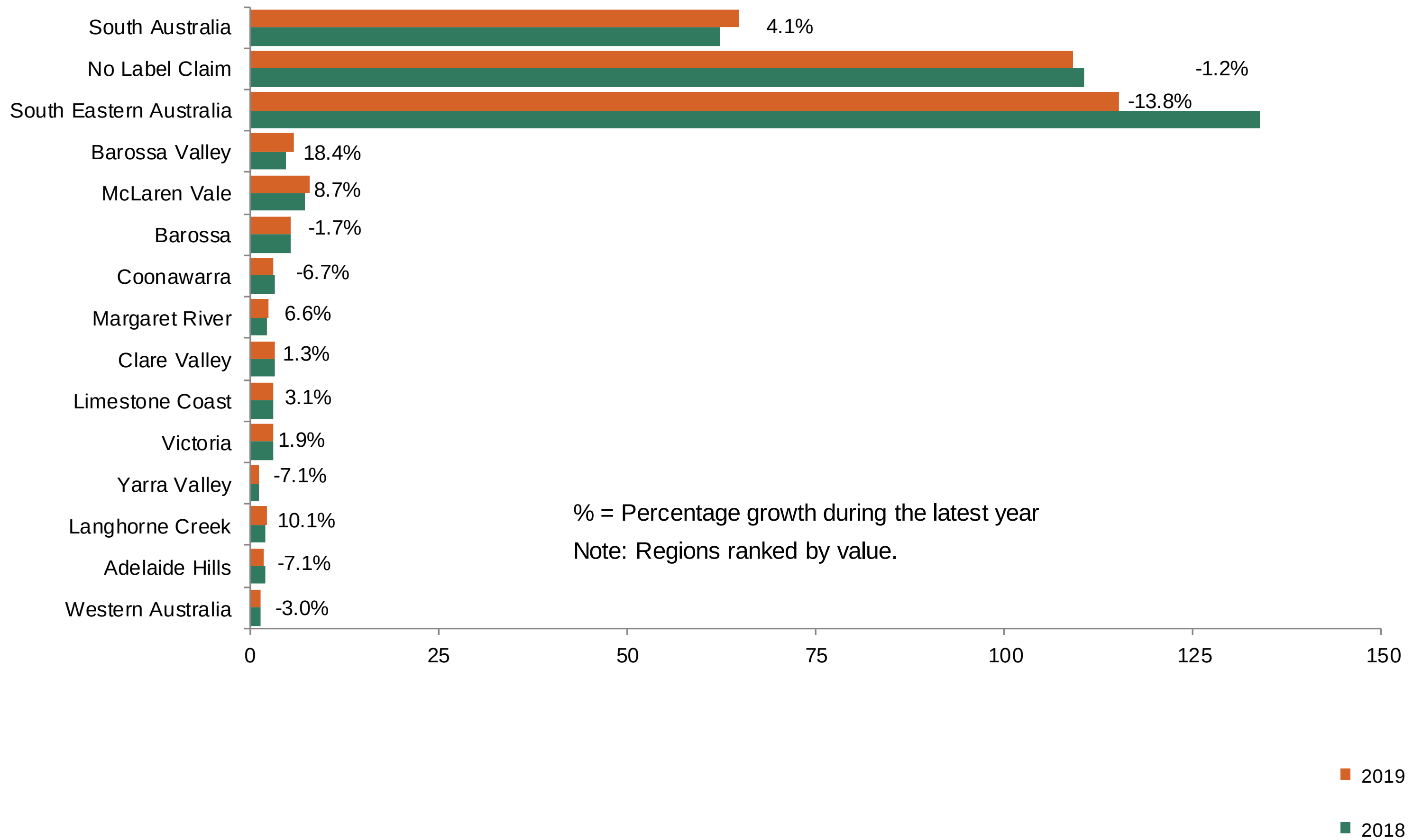
Bottled exports
by top 15 GI region label claims

Value (million A$) for MAT September 2019



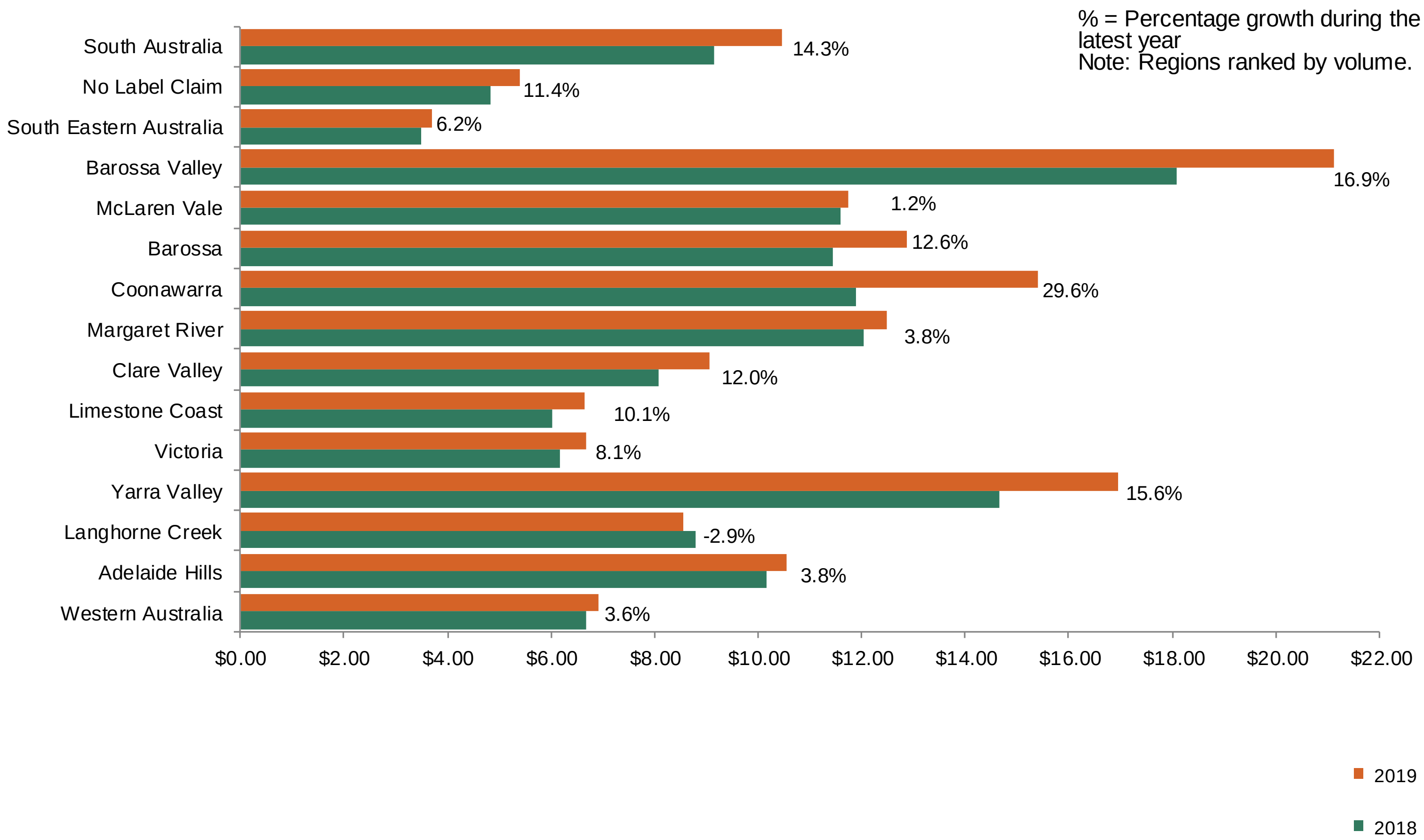
Bottled exports by top 15 GI region label claims

Volume (million litres) for MAT September 2019



Bottled exports by top 15 GI region label claims

Average Value (A$ per litre) for MAT September 2019

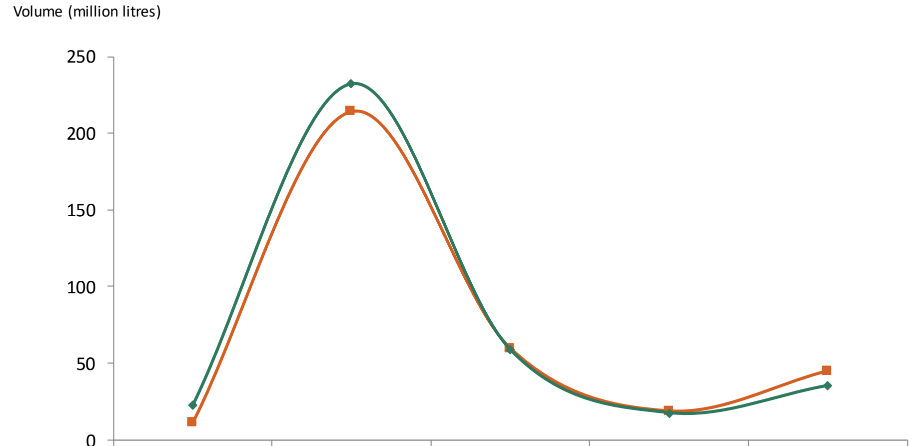


Bottled exports by price point

Volume

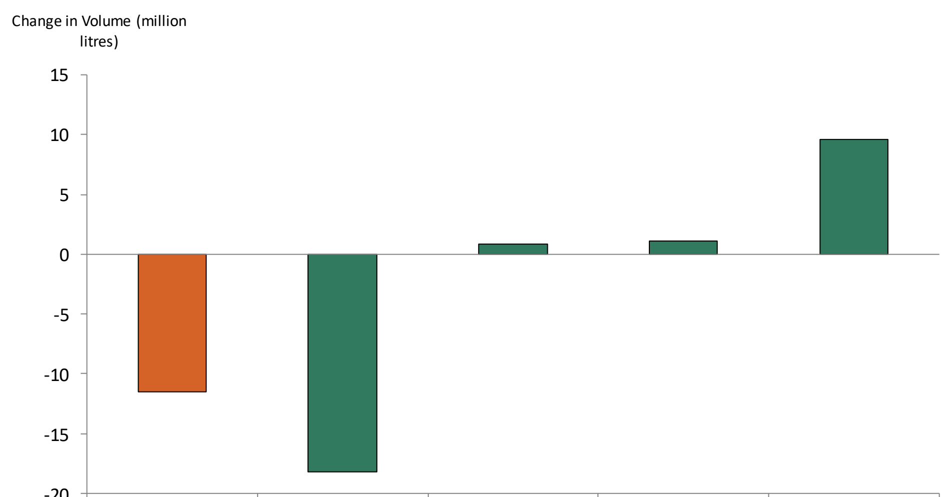
MAT September 2019

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
2019	11	214	60	19	45
2018	22	233	59	17	35

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	-51.5%	-7.8%	1.5%	6.4%	27.3%
Vol change	-11.5	-18.2	0.9	1.1	9.6

Unpackaged wine exports report

Unpackaged wine exports by price point and destination

Value (‘000 A$) for MAT September 2019

	$0.50 and under		$0.50 to $1.00		$1.00 to $1.50		$1.50 to $2.00		$2.00 to $2.50		$2.50 and above		Total	
	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %	MAT September 2019 ('000 AUD)	Change %
UK	69	150%	72,444	-15%	116,600	24%	12,966	36%	2,550	-4%	10,116	21%	214,744	7%
USA	119	238%	20,774	-46%	35,079	52%	14,469	-4%	830	-63%	1,897	-37%	73,169	-11%
China	-	na	-	-100%	15,433	-63%	6,852	-19%	4,352	-50%	32,828	79%	59,466	-26%
Canada	-	na	7,117	-44%	28,909	-6%	2,448	322%	509	127%	-	na	38,983	-12%
Germany	-	na	9,872	-31%	20,615	19%	2,414	514%	1,058	36%	2,059	-44%	36,017	-1%
New Zealand	96	130%	5,907	-11%	7,761	24%	1,012	50%	164	45%	6,330	33%	21,270	15%
Denmark	-	-100%	2,277	8%	9,395	71%	2,267	111%	115	-63%	130	-51%	14,183	53%
Netherlands	-	na	2,959	-44%	7,675	40%	1,349	297%	106	na	-	na	12,089	8%
Belgium	-	na	2,948	-29%	4,938	54%	1,193	227%	236	na	1	na	9,315	20%
Japan	-	na	1,535	-32%	5,608	29%	1,588	108%	98	na	414	69%	9,243	22%
France	-	na	827	-10%	2,746	-23%	3,168	251%	-	-100%	495	99%	7,237	26%
Finland	-	na	90	-96%	3,221	-2%	1,545	21%	341	-14%	657	138%	5,854	-23%
Sweden	-	na	-	-100%	288	-70%	1,098	9%	298	-71%	1,107	59%	2,790	-26%
Norway	-	na	-	na	1,152	38%	37	na	-	na	216	200%	1,405	55%
Switzerland	-	na	86	-91%	581	-9%	257	591%	110	na	340	na	1,375	-15%
Spain	-	na	59	-93%	356	-6%	338	314%	52	-52%	307	na	1,112	-24%
Thailand	-	na	64	-88%	814	-48%	158	-27%	-	na	-	na	1,035	-56%
Poland	-	na	-	na	61	-80%	581	113%	-	na	195	51%	837	20%
Other	-	na	315	-85%	433	35%	319	-4%	119	111%	205	-53%	1,391	-57%
Total	284	136%	127,273	-31%	261,665	8%	54,061	31%	10,938	-35%	57,298	41%	511,517	-3%

Unpackaged wine exports by price point and destination

Volume (‘000 litres) for MAT September 2019

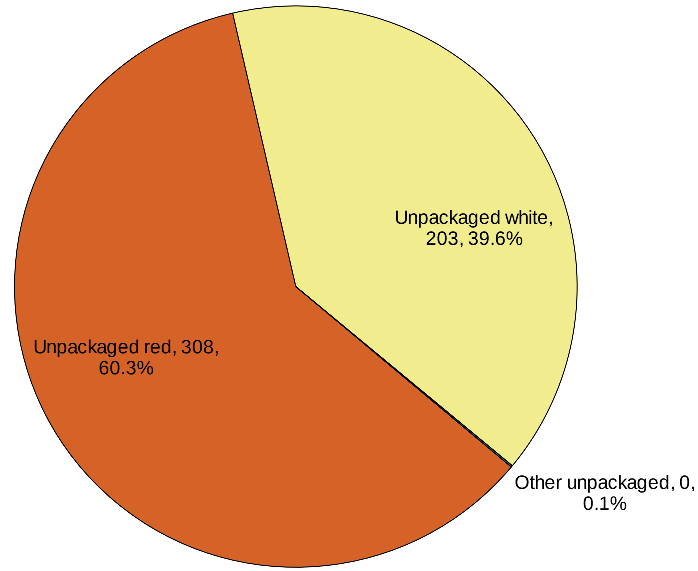
	$0.50 and under		$0.50 to $1.00		$1.00 to $1.50		$1.50 to $2.00		$2.00 to $2.50		$2.50 and above		Total	
	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %	MAT September 2019 ('000 Litres)	Change %
UK	357	274%	87,428	-15%	97,775	21%	8,013	43%	1,183	-3%	2,770	14%	197,525	2%
USA	268	273%	22,521	-50%	28,590	56%	8,822	-7%	359	-68%	480	-31%	61,040	-18%
Canada	-	na	8,360	-43%	24,388	-10%	1,465	303%	245	123%	-	na	34,458	-19%
Germany	-	na	10,694	-34%	16,354	13%	1,536	540%	528	38%	648	-45%	29,761	-8%
China	-	na	-	-100%	11,973	-66%	4,147	-19%	1,944	-50%	7,368	103%	25,432	-51%
New Zealand	264	84%	7,896	-15%	6,413	21%	634	54%	72	49%	1,127	23%	16,406	2%
Denmark	-	-100%	2,539	3%	7,244	48%	1,334	111%	48	-63%	50	-18%	11,216	36%
Netherlands	-	na	3,294	-48%	6,392	40%	886	300%	48	na	-	na	10,619	-4%
Belgium	-	na	3,553	-29%	4,276	54%	731	236%	96	na	0	na	8,656	8%
Japan	-	na	1,604	-36%	4,989	34%	956	119%	48	na	120	67%	7,717	14%
France	-	na	841	-20%	2,441	-20%	2,025	279%	-	-100%	157	172%	5,464	15%
Finland	-	na	102	-96%	2,759	2%	985	37%	150	-14%	187	275%	4,183	-33%
Sweden	-	na	-	-100%	262	-65%	614	6%	144	-72%	414	60%	1,434	-34%
Norway	-	na	-	na	792	14%	24	na	-	na	72	200%	888	23%
Switzerland	-	na	96	-92%	480	0%	168	600%	48	na	72	na	863	-51%
Thailand	-	na	72	-88%	648	-48%	96	-33%	-	na	-	na	816	-59%
Spain	-	na	72	-94%	290	-7%	196	308%	26	-50%	122	na	706	-56%
Italy	-	na	432	-66%	-	na	72	-50%	-	-100%	-	-100%	504	-65%
Other	-	na	-	-100%	379	-25%	486	125%	52	117%	138	-1%	1,054	-55%
Total	889	132%	149,504	-31%	216,445	5%	33,189	32%	4,990	-35%	13,723	44%	418,741	-10%

Unpackaged exports by colour/ wine style

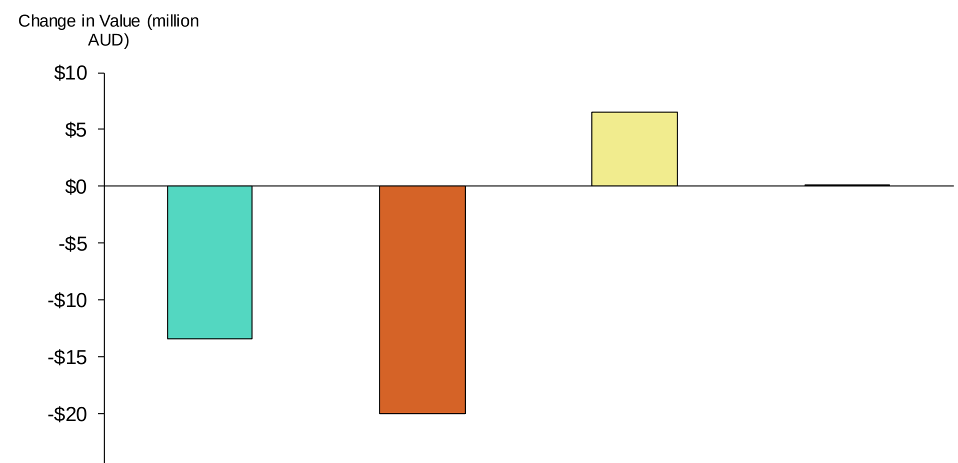
Value

MAT September 2019

Value (A$ million)



Change in Value (A$ million)



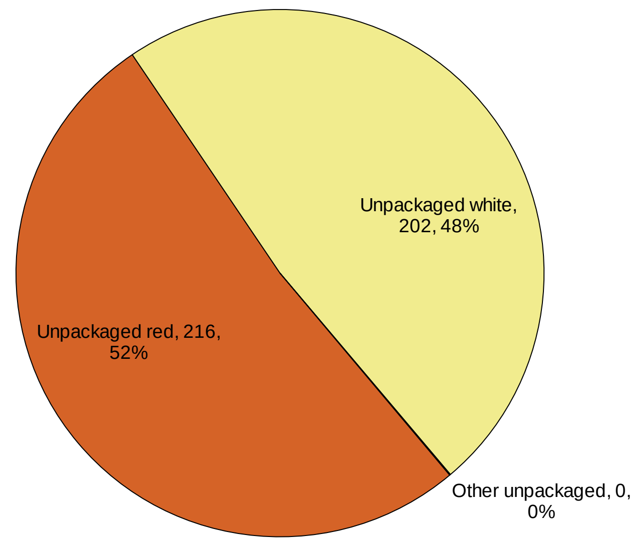
	Total unpackaged	Unpackaged red	Unpackaged white	Other unpackaged
% change	-2.6%	-6.1%	3.3%	14.1%
Val change	-13.5	-20.1	6.5	0.1

Unpackaged exports by colour/ wine style

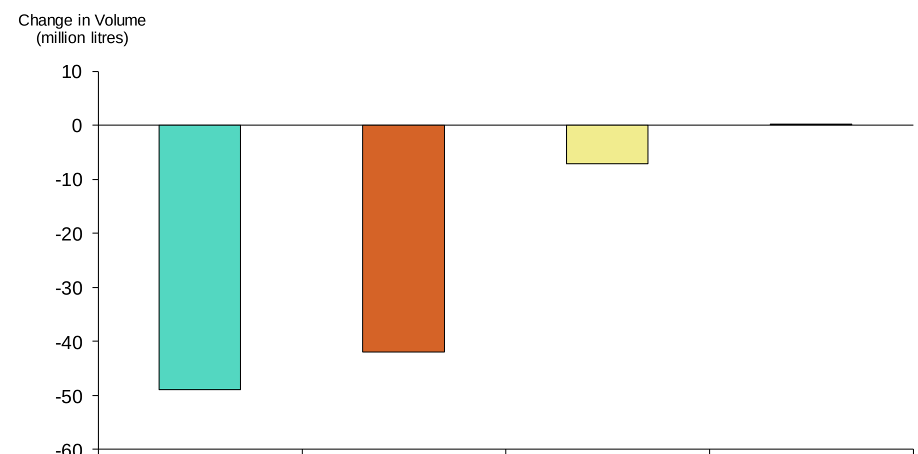
Volume

MAT September 2019

Volume (million litres)



Change in Volume (million litres)



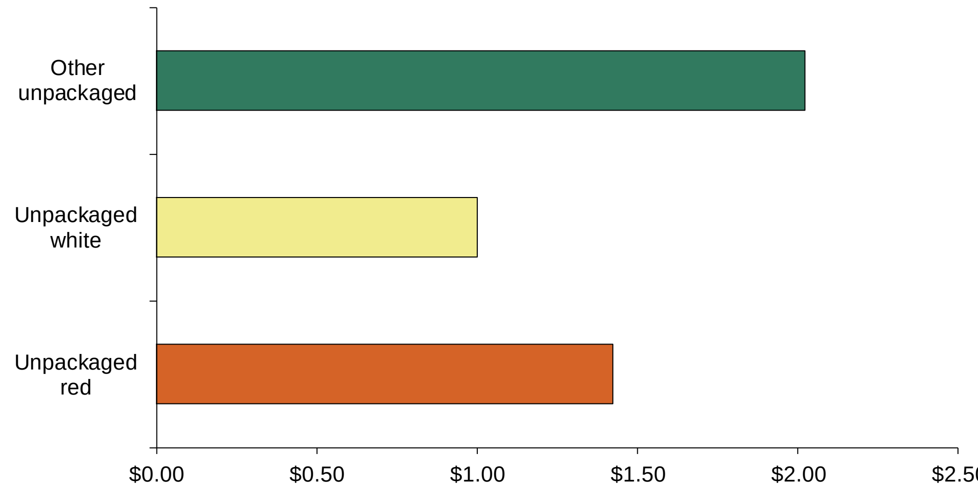
	Total unpackaged	Unpackaged red	Unpackaged white	Other unpackaged
% change	-10%	-16%	-3%	12%
Vol change	-48.8	-41.8	-7.0	0.0

Unpackaged exports by colour/ wine style

Average value

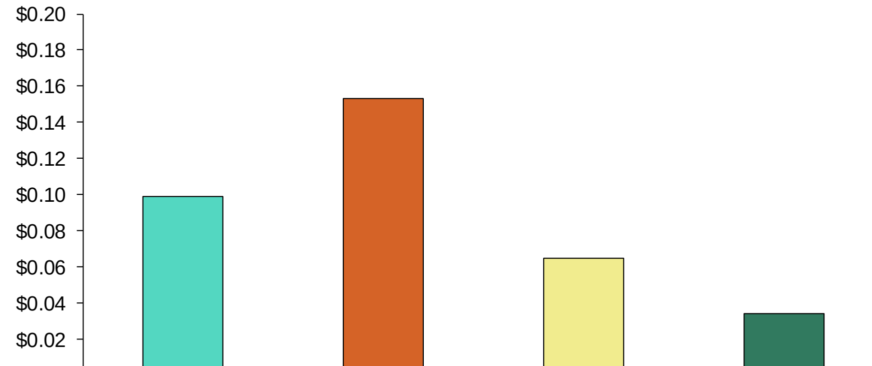
MAT September 2019

Average value (A$ per litre)



	Unpackaged red	Unpackaged white	Other unpackaged
2019	$1.43	$1.00	$2.02

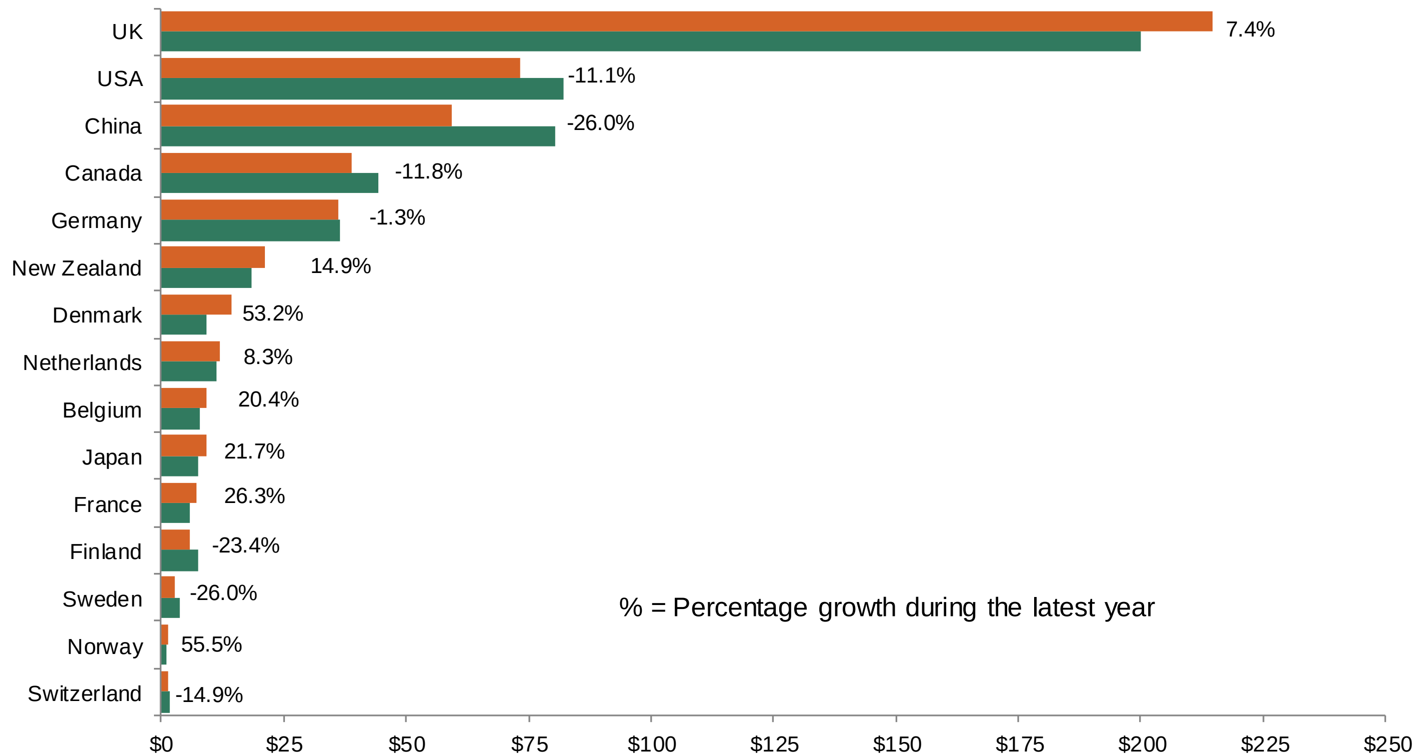
Change in average value (A$ per litre)



	Total unpackaged	Unpackaged red	Unpackaged white	Other unpackaged
% change	8.8%	12.1%	6.9%	1.7%
Av. Val change	$0.10	$0.15	$0.06	$0.03

Unpackaged exports by top 15 destinations

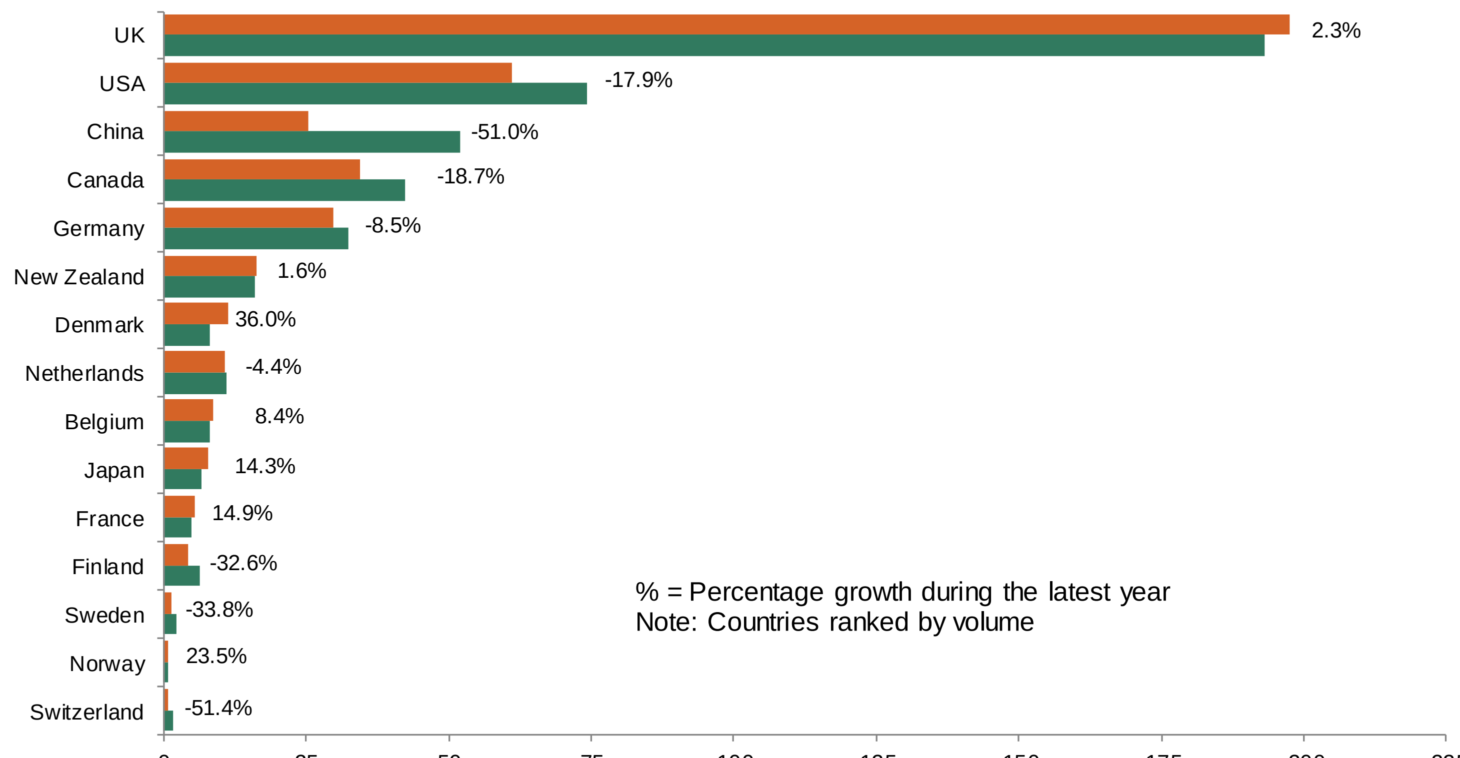
Value (million A$) for MAT September 2019



	Switzerland	Norway	Sweden	Finland	France	Japan	Belgium	Netherlands	Denmark	New Zealand	Germany	Canada	China	USA	UK
2019	1.4	1.4	2.8	5.9	7.2	9.2	9.3	12.1	14.2	21.3	36.0	39.0	59.5	73.2	214.7
2018	1.6	0.9	3.8	7.6	5.7	7.6	7.7	11.2	9.3	18.5	36.5	44.2	80.3	82.3	200.0

Unpackaged exports by top 15 destinations

Volume (million litres) for MAT September 2019

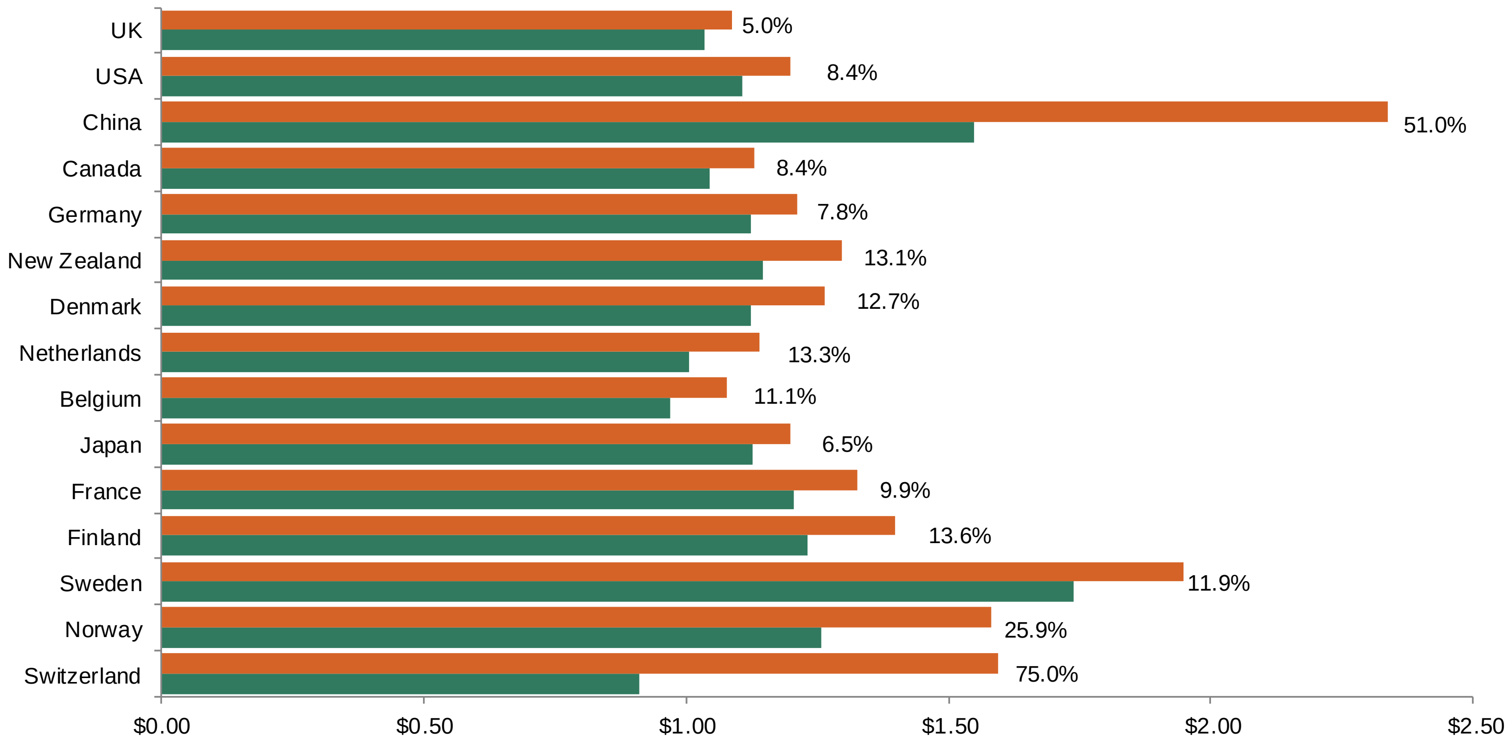


	Switzerland	Norway	Sweden	Finland	France	Japan	Belgium	Netherlands	Denmark	New Zealand	Germany	Canada	China	USA	UK
2019	0.9	0.9	1.4	4.2	5.5	7.7	8.7	10.6	11.2	16.4	29.8	34.5	25.4	61.0	197.5
2018	1.8	0.7	2.2	6.2	4.8	6.8	8.0	11.1	8.2	16.1	32.5	42.4	51.9	74.4	193.2

Unpackaged exports by top 15 destinations

Average Value (A$ per litre) for MAT September 2019

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



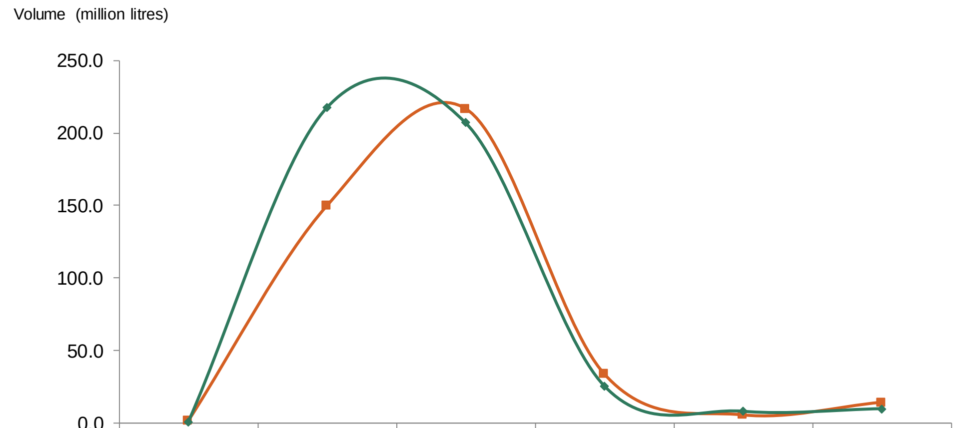
	Switzerland	Norway	Sweden	Finland	France	Japan	Belgium	Netherlands	Denmark	New Zealand	Germany	Canada	China	USA	UK
2019	$1.59	$1.58	$1.95	$1.40	$1.32	$1.20	$1.08	$1.14	$1.26	$1.30	$1.21	$1.13	$2.34	$1.20	$1.09
2018	$0.91	$1.26	$1.74	$1.23	$1.21	$1.13	$0.97	$1.00	$1.12	$1.15	$1.12	$1.04	$1.55	$1.11	$1.04

Unpackaged exports by price point

Volume

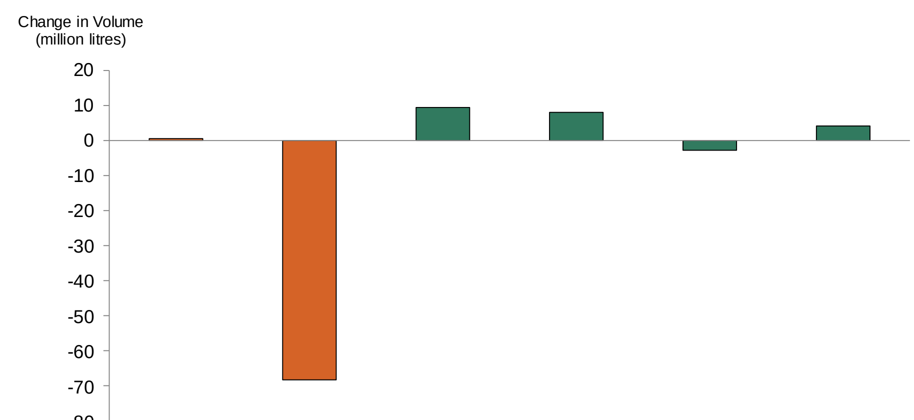
MAT September 2019

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
2019	0.9	149.5	216.4	33.2	5.0	13.7
2018	0.4	218	207	25	7.7	9.5

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	132.3%	-31.3%	4.5%	31.8%	-35.3%	44.3%
Vol change	0.5	-68.2	9.4	8.0	-2.7	4.2

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 12 months compared to the preceding 12 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.
- **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