Wine Australia for Australian Wine

Export Report

12 months to 31 December 2020

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Executive summary

- Exports peaked at more than $3 billion in October.
- The imposition of temporary tariffs has seen a dramatic fall in exports to mainland China in December.
- This was partially offset by growth in exports to other destinations, particularly to Europe and North America.
- The UK and USA are showing solid growth in exports and in off-trade sales.

Commentary

Overview

In the 12 months ended December 2020, exports decreased by 1 per cent in value to $2.89 billion and increased by 0.5 per cent in volume to 747 million litres (83 million 9-litre case equivalents). The average price per litre declined 1 per cent to $3.87 free on board (FOB).

Figure 1 shows that the value of exports hit a record of $3.1 billion in the 12 months ended October 2020 before a steep decline in the last two months of the calendar year. The sharp increase from August to October was primarily in exports to mainland China and the United Kingdom (UK), while the decline since the peak was in exports to mainland China.

Container type

In the past 12 months, the value of wine exported in glass bottles decreased by 5 per cent to $2.3 billion and volume decreased by 9 per cent to 311 million litres (35 million 9-litre case equivalents). This translated to 4 per cent increase in the average value of bottled exports to a near record $7.34 per litre FOB (the record was $7.45 per litre FOB in the 12 months ended October 2020).

Unpackaged wine exports increased by 20 per cent in value to $585 million and increased 9 per cent in volume to 428 million litres (48 million 9-litre case equivalents). The average price of unpackaged wine increased by 10 per cent to $1.37 per litre FOB.

Figure 2 illustrates the steady growth in the average price per litre of both glass bottle and unpackaged over the last five years. The drop in the bottled average price in the past two months has been due to the decline in exports to mainland China where exports have been heavily weighted to wines priced at $10 or more per litre. (NB Tariffs imposed since November apply to wine packaged in containers of less than two litres.)

Figure 1: Value of Australian exports over time (A$ billion FOB)

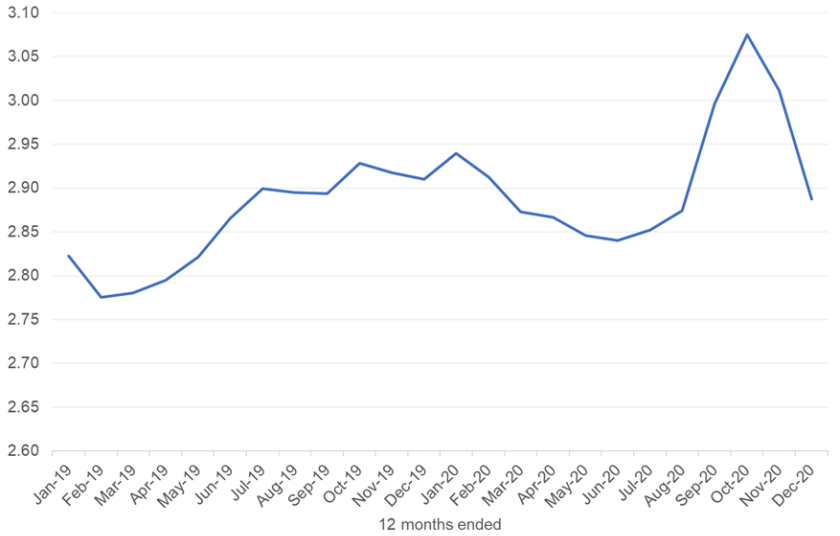
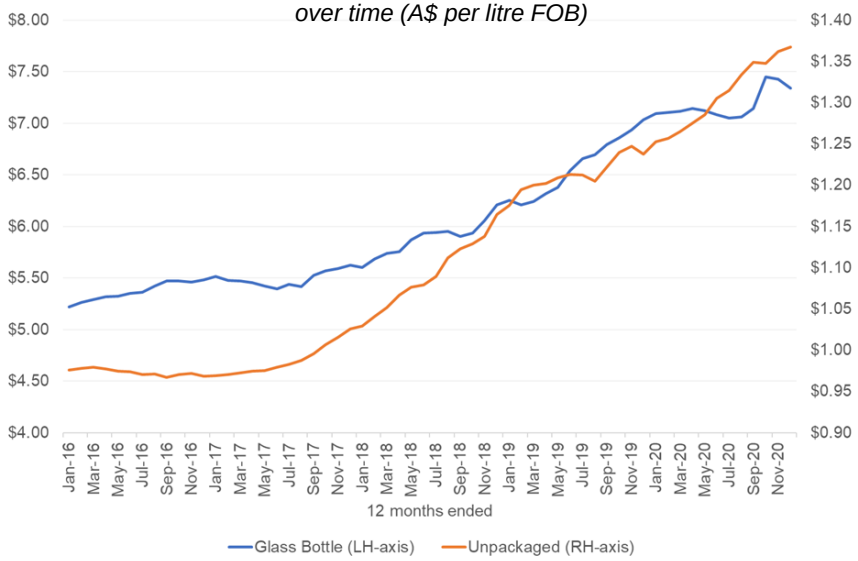


Figure 2: Average price per litre of glass bottle and unpackaged exports over time (A$ per litre FOB)



Commentary (continued)

Price segment

In general, there was decline in value across most price points, with the notable exception of under $2.50 per litre FOB and $50 or more per litre FOB (see Figure 3).

Exports below $2.50 per litre FOB increased by 17 per cent, driven by increased shipments to the UK, New Zealand, Scandinavia, Germany, and Canada.

There was also very strong growth in exports at $50 or more per litre FOB, up 26 per cent, driven by growth over the year to mainland China, Hong Kong, Malaysia and Indonesia.

For price points between $2.50 and $49.99, the decline was driven by the slowdown in exports to mainland China, which offset growth in other markets such as the UK, the United States, Canada and New Zealand.

Figure 3: Total exports by price point (A$ million FOB)

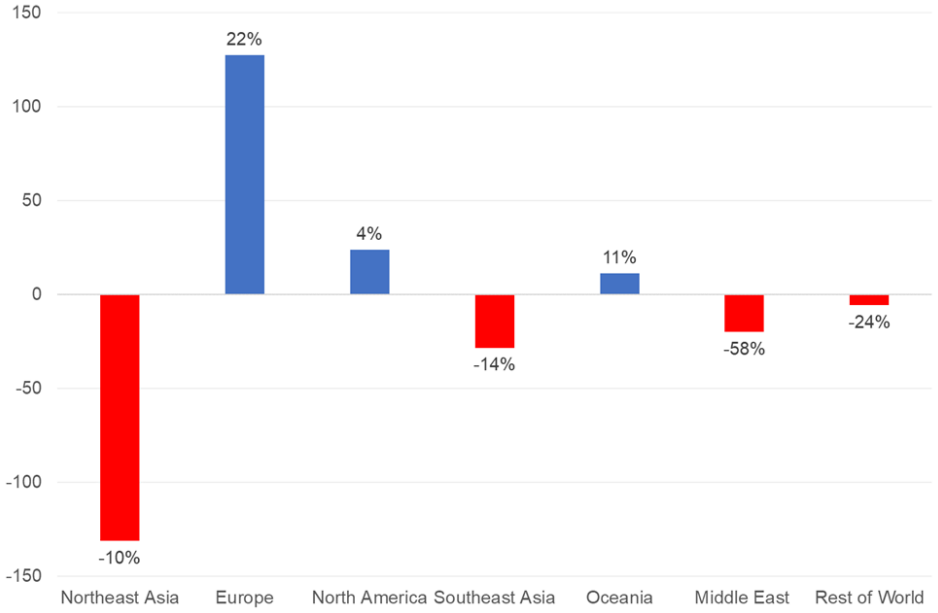
Price segment (A$/litre)	MAT December 2020	Value change	Growth rate
$2.49 and under	$541	$79	17%
$2.50 to $4.99	$780	-$33	-4.1%
$5.00 to $7.49	$331	-$52	-13.6%
$7.50 to $9.99	$152	-$10.4	-6.4%
$10.00 to $14.99	$200	-$47	-19.1%
$15.00 to $19.99	$80	-$6	-7%
$20.00 to $29.99	$200	-$22	-10.0%
$30.00 to $49.99	$114	-$32	-22%
$50.00 to $99.99	$347	$76	28%
$100.00 to $199.99	$63	$2	3%
$200.00 and over	$80	$23	40%
Total value	$2,887	-$23	-0.8%

Destinations

In the 12 months ended December 2020, Australian exporters shipped wine to 114 destinations (down from 120 destinations in the same period in 2019).

The most significant growth came in exports to Europe, up 22 per cent to $704 million, the highest value in a decade. There was also growth to North America, up 4 per cent to $628 million, and Oceania, up 11 per cent to $115 million. The growth to these destinations was offset by a decline to Northeast Asia, down 10 per cent to $1.2 billion, as well as to Southeast Asia, down 14 per cent to $172 million, and the Middle East, down 58 per cent to $14 million.

Figure 4: Change in value of exports by region



Commentary (continued)

The top 5 markets by value are:

- Mainland China, down 14 per cent to $1.01 billion
- United Kingdom (UK), up 29 per cent to $456 million
- United States of America (USA), up 4 per cent to $434 million
- Canada, up 5 per cent to $192 million, and
- Hong Kong, up 27 per cent to $132 million.

Hong Kong moves back into the top five, replacing New Zealand.

The top five destinations by volume were:

- UK, up 19 per cent to 266 million litres
- USA, down 1 per cent to 136 million litres
- Mainland China, down 29 per cent to 96 million litres
- Canada, up 0.3 per cent to 56 million litres, and
- Germany, up 10 per cent to 35 million litres.

China

The Chinese Ministry of Commerce (MOFCOM) announced a decision to impose temporary deposit tariffs from 28 November 2020 of between 107.1 per cent and 212.1 per cent on Australian wine in containers of up to 2 litres ahead of finalising the ongoing anti-dumping investigation. MOFCOM announced a decision to impose temporary countervailing duty deposit from 11 December 2020 of between 6.3 per cent and 6.4 per cent on Australian wine ahead of finalising the countervailing duties investigation.

Australian wine exports to China (including Hong Kong and Macau) decreased by 10 per cent in value to $1.15 billion and decreased 27 per cent in volume to 104 million litres (11.6 million 9-litre case equivalents) in the 12 months ended December 2020. The average value of exports increased by 23 per cent to $11.02 per litre FOB, a record level. The increase in the average value was due to the decline in exports being much stronger in lower-priced wines compared to the higher end.

Mainland China

Exports to mainland China were down, unsurprisingly, following the imposition of temporary tariffs in November. Value declined 14 per cent to $1.01 billion and volume by 29 per cent to 96 million litres (10.7 million 9-litre case equivalents). Average value increased by 21 per cent to $10.52 per litre FOB. The average value per litre of Australian exports to mainland China is two-and-a-half times the average value of all Australian wine exports.

Figure 5 illustrates that most price points declined to mainland China, with the exception of $50 to 99.99 per litre FOB and at $200 or more per litre FOB. The declines were stronger at the lower end.

Figure 5: Exports to mainland China by Price Point (A$ million FOB)

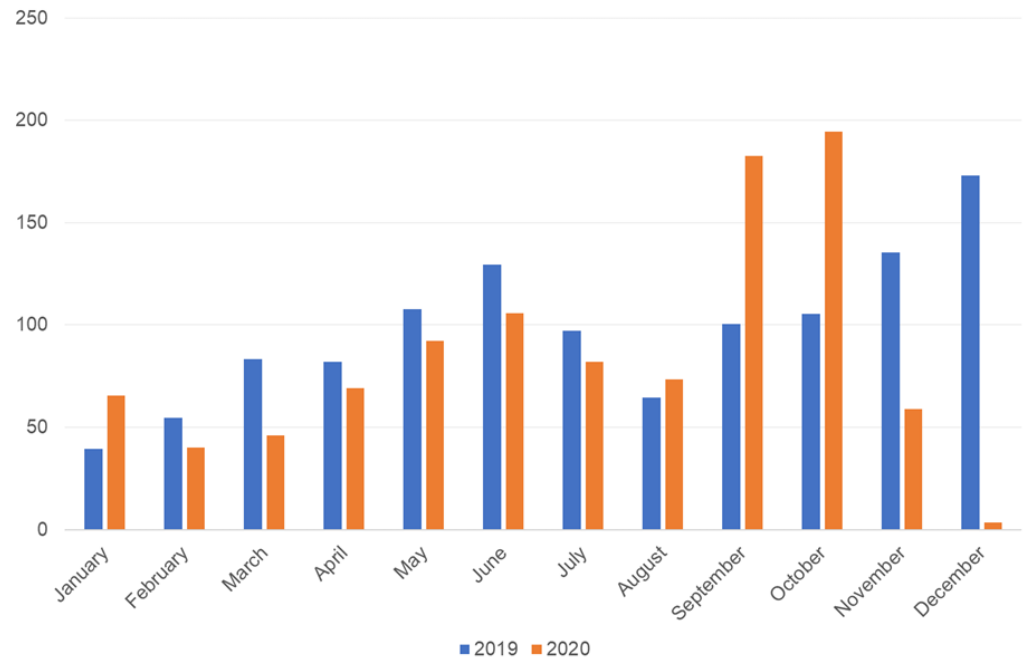
Price segment (A$/litre)	MAT December 2020	Value change	Growth rate
$2.49 and under	$18	-$7	-27%
$2.50 to $4.99	$146	-$68	-32%
$5.00 to $7.49	$110	-$61	-36%
$7.50 to $9.99	$54	-$7.2	-12%
$10.00 to $14.99	$93	-$37	-28%
$15.00 to $19.99	$52	-$0.5	-1%
$20.00 to $29.99	$137	-$13	-9%
$30.00 to $49.99	$72	-$33	-31%
$50.00 to $99.99	$249	$57	30%
$100.00 to $199.99	$39	-$2	-6%
$200.00 and over	$45	$13	39%
Total value	$1,014	-$159	-14%

Commentary (continued)

Figure 6 illustrates the impact of the tariff imposition on the value of exports to mainland China in November and particularly December. Exports fell from $135 million in November 2019 to $58 million in November 2020.

The decline was even more dramatic in December. In December 2020, exports fell to $4 million compared to $173 million in December 2019. The number of exporters fell from 832 to 48. Bottled exports fell from $166 million to $3 million and unpackaged exports from $7 million to $300,000. For bottled exports, all price points declined but the biggest fall in absolute value terms came at $10 or more per litre, down from $117 million to $2.4 million.

Figure 6: Value of exports to mainland China by month (A$ million FOB)



Exports to mainland China will be constrained while the tariffs remain in place and any exports are likely to be higher-priced products that are less price sensitive and are better able to absorb the price increases. In addition, some product may be sent in bulk and be bottled in-market. Also, some exporters may divert products into Hong Kong, where there is a zero tariff. In December 2020, the number of exporters to Hong Kong increased to 109 compared to 72 in December 2019, and the value for the month increased from $9 million in 2019 to $40 million in 2020.

United States

After declining for the three previous calendar years, the value of exports to the USA increased, despite the widespread effects of the pandemic and the political turmoil that engulfed the country during the year.

The value of exports increased by 4 per cent to $434 million, despite volume falling by 1 per cent to 136 million litres (15.1 million 9-litre case equivalents). The average value increased by 5 per cent to $3.21 per litre, the highest level since 2009.

The key price point driving the growth was $2.50 to $4.99 per litre (see Figure 7). While off a much smaller base, there was also very strong growth at $20.00 to $29.99 and between $50 and $200 per litre FOB.

Data from IRI indicate that the export growth is also translating into growth in retail sales in the US. In the 12 months ended December 2020, Australian sales in the US off-trade market increased by 10 per cent in value and 6 per cent in volume. The strongest growth for Australian wine came at $US8 to $11.99 (up 34 per cent) and $US20 to $24.99 per bottle (up 15 per cent).

Commentary (continued)

Figure 7: Exports to United States by Price Point (A$ million FOB)

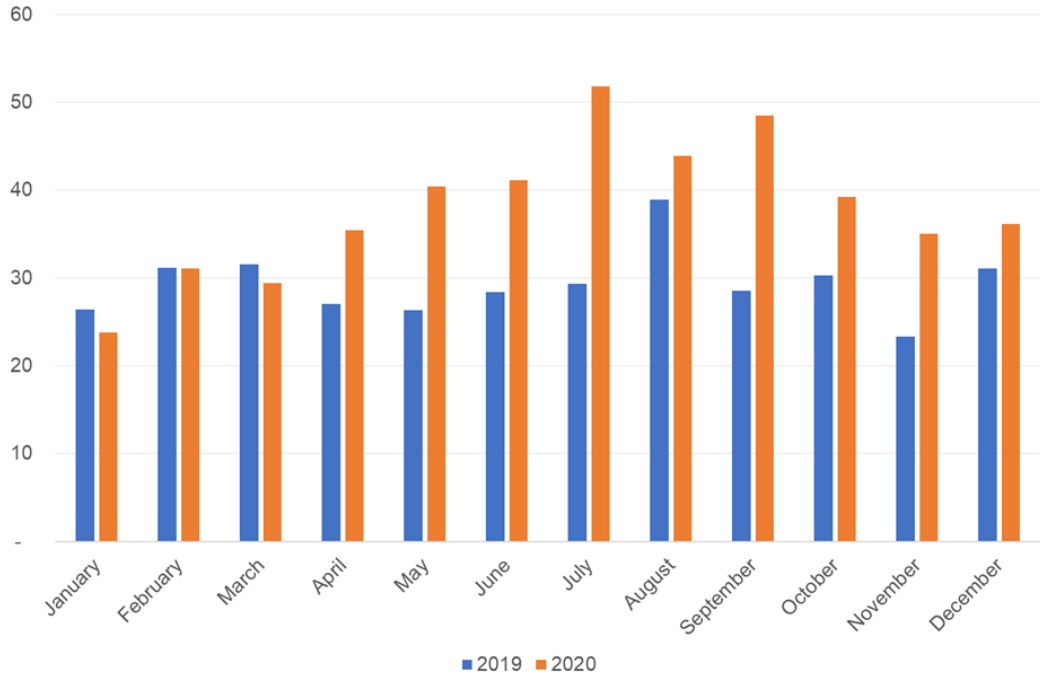
Price segment (A$/litre)	MAT December 2020	Value change	Growth rate
$2.49 and under	$73	-$0.1	-0.1%
$2.50 to $4.99	$288	$22	8%
$5.00 to $7.49	$23	$1	6%
$7.50 to $9.99	$11	-$6	-36%
$10.00 to $14.99	$18	-$2	-8%
$15.00 to $19.99	$5	-$3	-36%
$20.00 to $29.99	$10	$2	26%
$30.00 to $49.99	$3	-$0.4	-11%
$50.00 to $99.99	$2	$0.3	15%
$100.00 to $199.99	$1	$0.3	31%
$200.00 and over	$0	-$0.4	-64%
Total value	$434	$15	4%

United Kingdom

The UK continued the strong growth that commenced at the advent of the pandemic due to increased demand and then boosted in the months leading up to Brexit. Exports in the 12 months ended December 2020 to the UK increased by 29 per cent in value to $456 million and 19 per cent in volume to 266 million litres (29.6 million 9-litre case equivalents), extending its lead as the biggest destination for Australian wine exports by volume. The average price received for Australian wine increased by 9 per cent to $1.71 per litre, the highest level since September 2011.

Figure 8 shows that exports to the UK have been on the rise since April, in response to growing demand for wine in the UK market following the pandemic as well as some sending wine into the market ahead of Brexit. IRI reports that in the 12 months December 2020, Australian sales in the UK off-trade market increased by 13 per cent in value and 9 per cent in volume. Australia has been the number one country of origin in the UK off-trade market for twenty years. For Australian wine, the growth was across most price points, but was strongest between £9 and £20 per bottle.

Figure 8: Value of exports to United Kingdom by month (A$ million FOB)



Commentary (continued)

The retail growth is supported by the export data. Figure 9 shows that there was growth in exports across all price points, with the exception of $15.00 to $19.99 per litre. There was very strong growth in both the lowest- (which is mainly unpackaged wine) and highest-priced wines. While Australian wines are heavily weighted to the commercial/value end in the market, premium Australian wines are on the rise to the UK.

Figure 9: Exports to United Kingdom by Price Point (A$ million FOB)

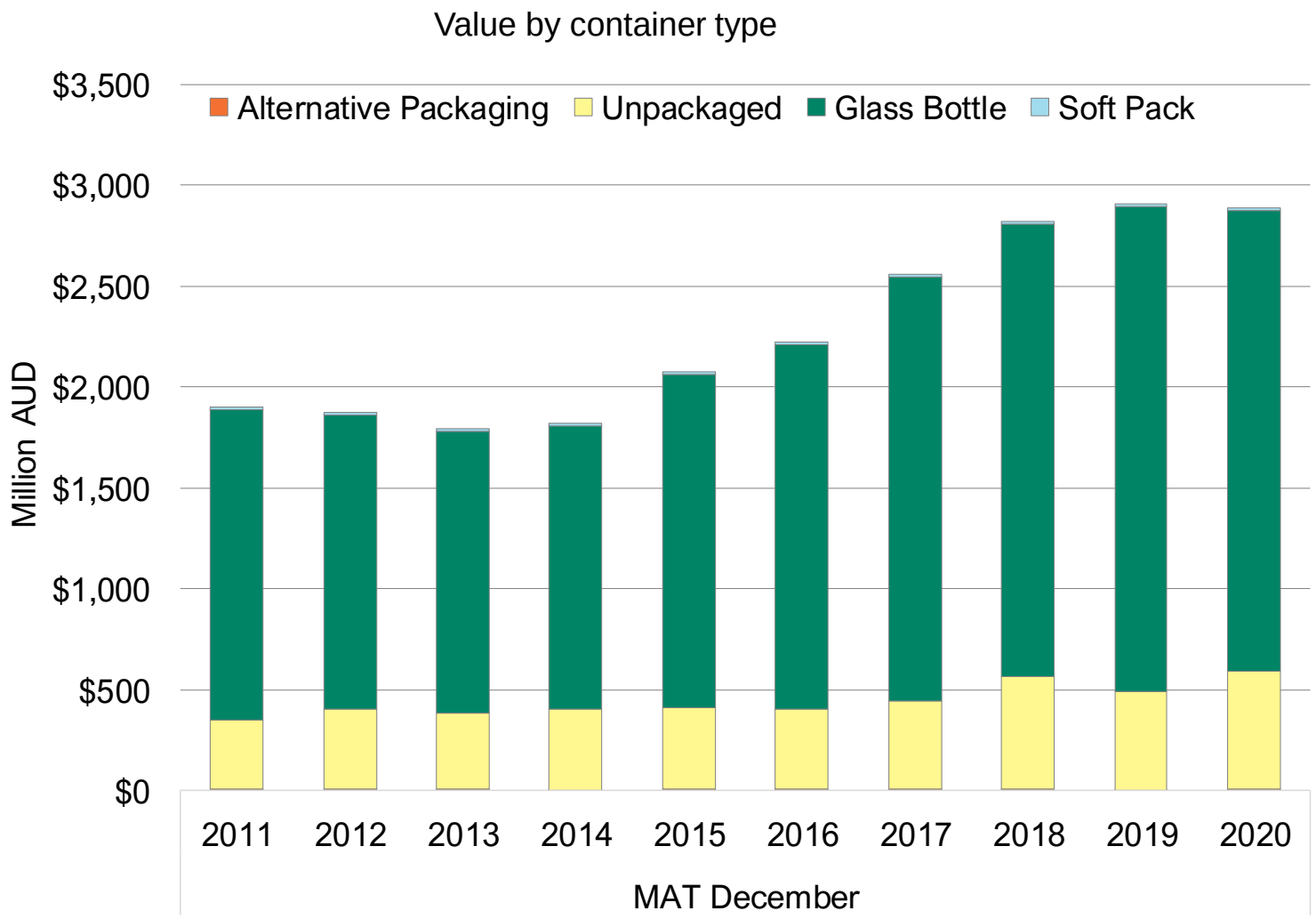
Price segment (A$/litre)	MAT December 2020	Value change	Growth rate
$2.49 and under	$273	$72	35.9%
$2.50 to $4.99	$117	$23	24%
$5.00 to $7.49	$26	$3	11%
$7.50 to $9.99	$15	$3	20%
$10.00 to $14.99	$11	$1.0	10%
$15.00 to $19.99	$3	-$0.1	-4%
$20.00 to $29.99	$3	$0.1	5%
$30.00 to $49.99	$4	$0.7	23%
$50.00 to $99.99	$2	$0.5	37%
$100.00 to $199.99	$1	$0.5	165%
$200.00 and over	$1	$0.7	207%
Total value	$456	$103	29%

Other markets

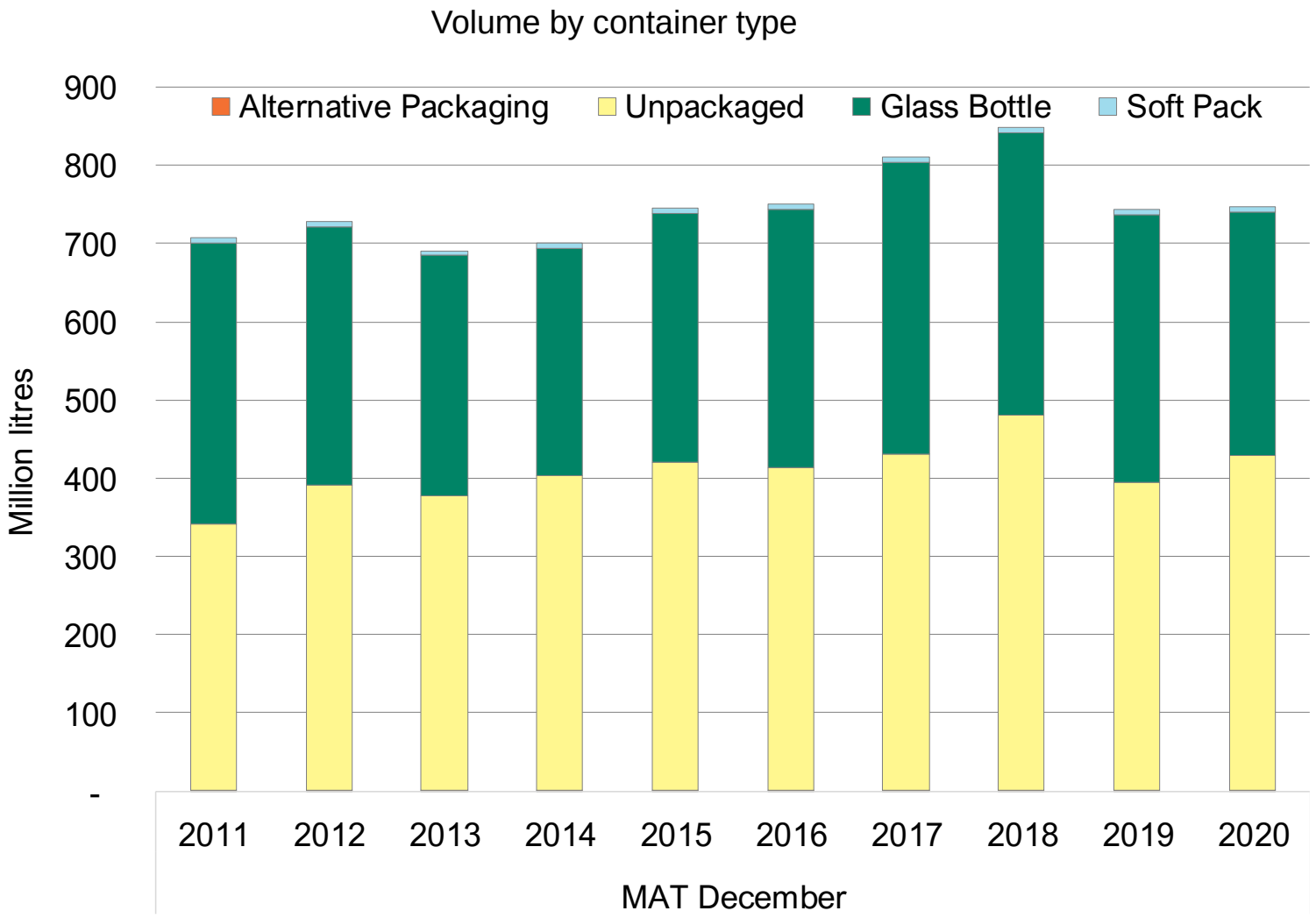
While the impact on exports to mainland China has been swift and dramatic, there has been growth to many other destinations outside the top five, including:

- New Zealand, up 17 per cent to $107 million
- Germany, up 15 per cent to $55 million
- Malaysia, up 22 per cent to $43 million
- Denmark, up 31 per cent to $37 million
- South Korea, up 37 per cent to $27 million
- Sweden, up 16 per cent to $25 million
- Belgium, up 6 per cent to $18 million.

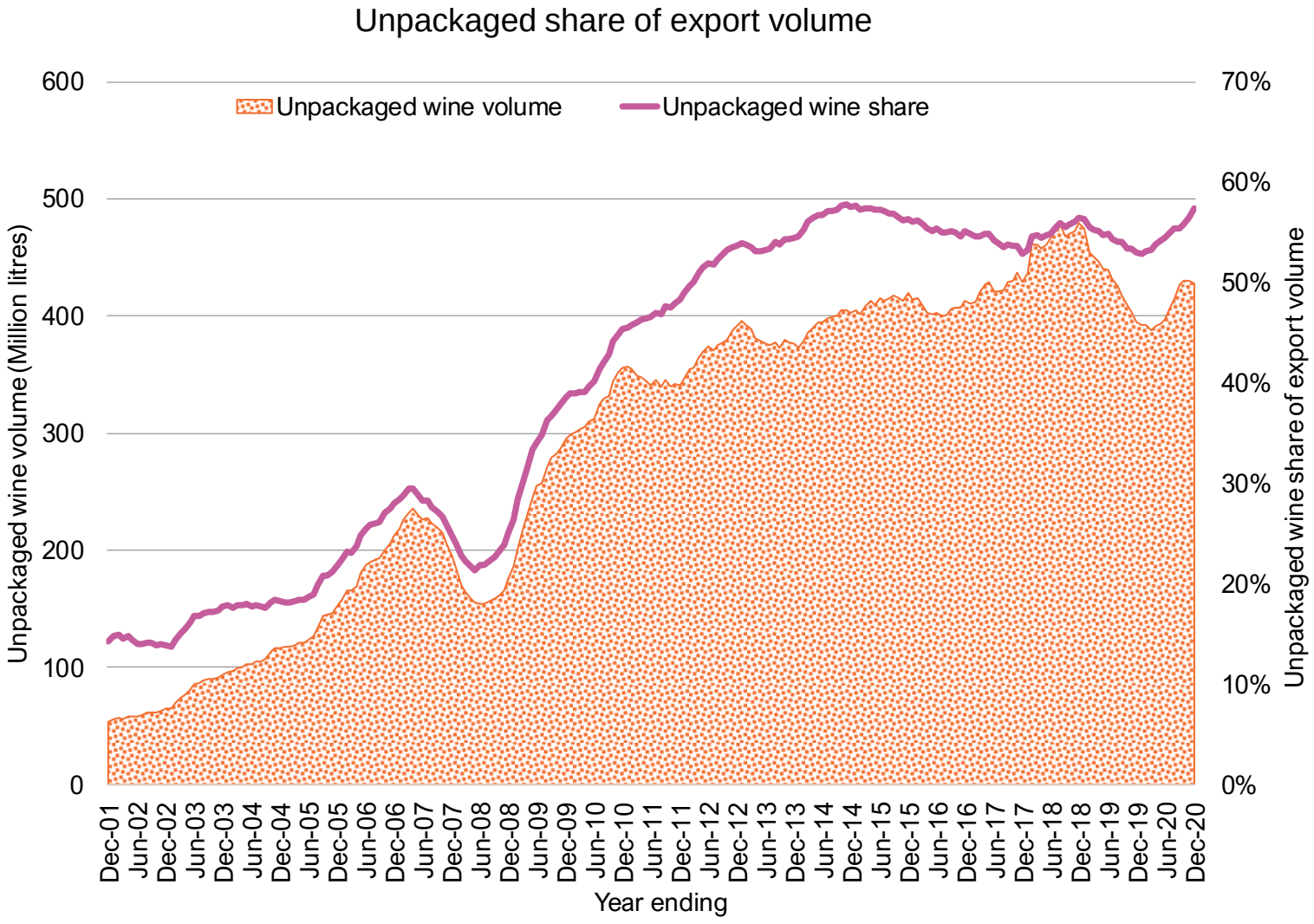
Historic overview of exports



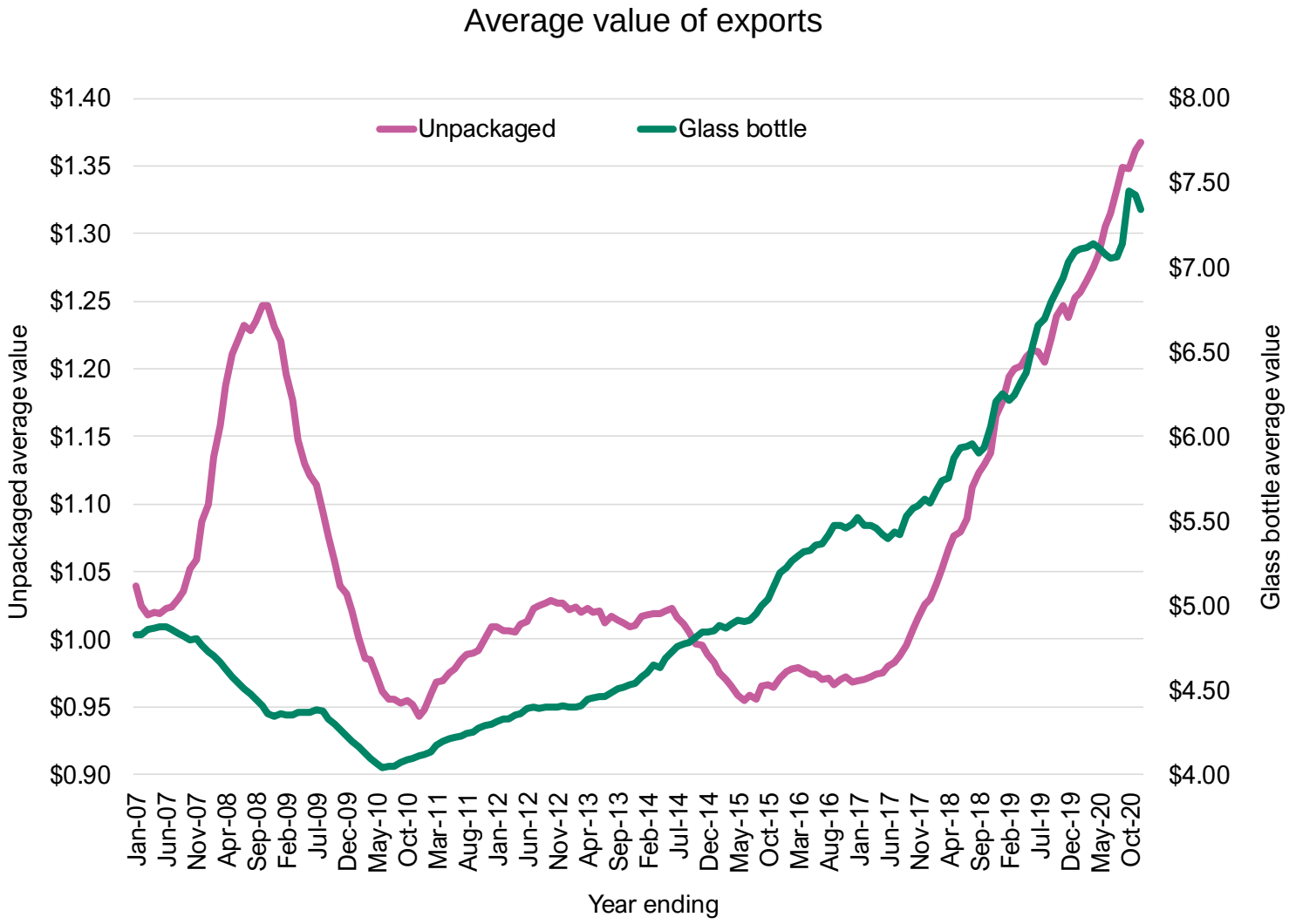
Historic overview of exports



Historic overview of exports

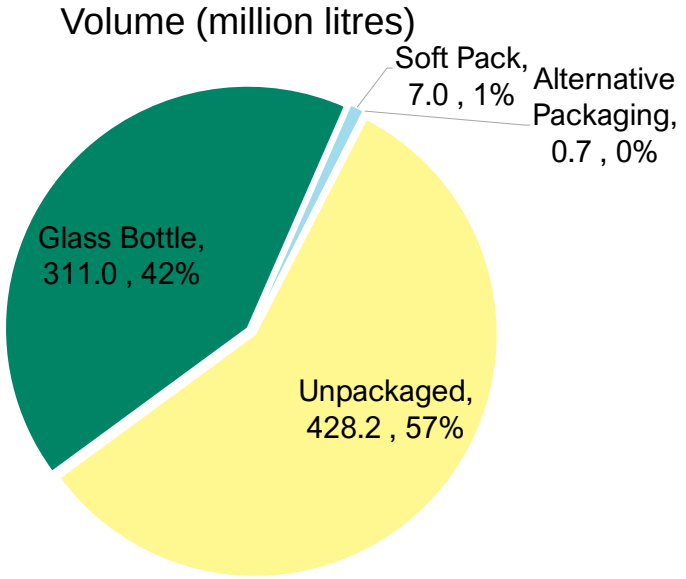


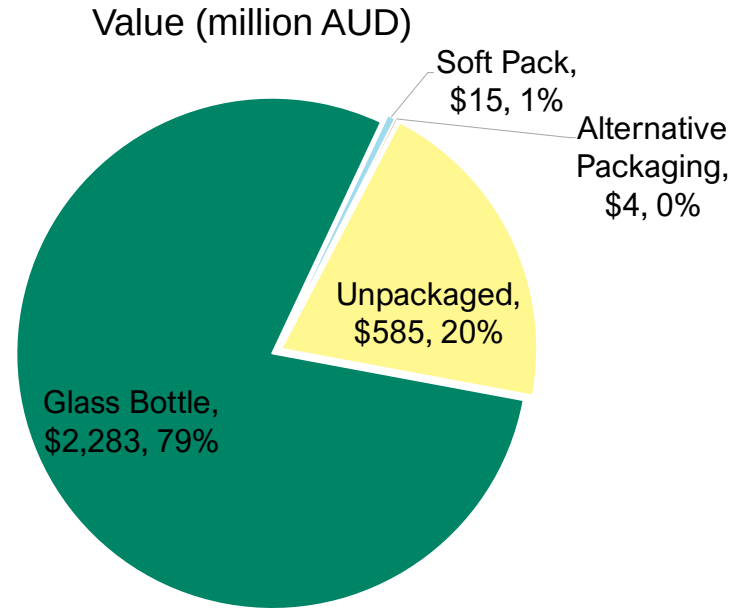
Historic overview of exports



Exports by container type

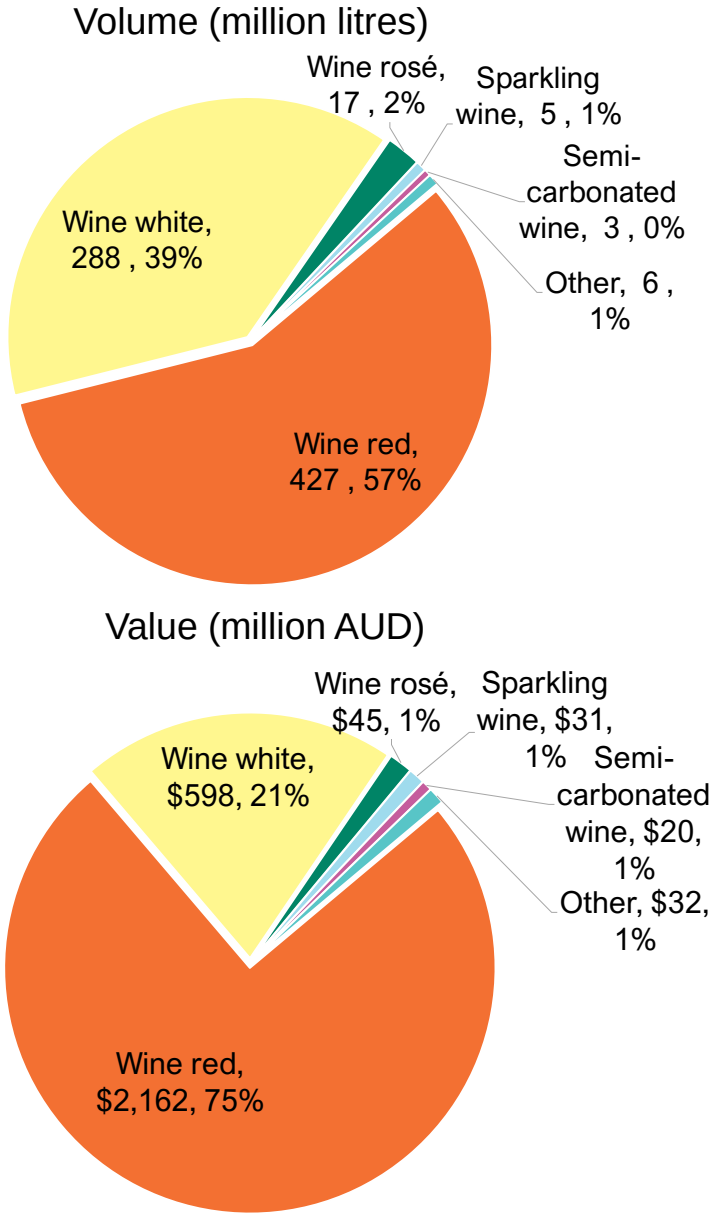
Container type	Measure	Volume (million litres)	Value (million AUD)	Average value (AUD/litre)
Glass Bottle	2020	311	$2,283	$7.34
	Change	-31	-$122	$0.30
	% change	-9%	-5%	4%
	Share	42%	79%	
Unpackaged	2020	428	$585	$1.37
	Change	34	$97	$0.13
	% change	9%	20%	10%
	Share	57%	20%	
Soft Pack	2020	7	$15	$2.11
	Change	0	$1	$0.05
	% change	5%	8%	3%
	Share	1%	1%	
Alternative Packaging	2020	1	$4	$6.35
	Change	0.1	$0.6	-$0.05
	% change	16%	16%	-1%
	Share	0.1%	0.2%	
Total	2020	747	$2,887	$3.87
	Change	3	-$23	-$0.05
	% change	0.5%	-1%	-1%





Exports by wine style

Wine style	Measure	Volume (million litres)	Value (million AUD)	Average value (AUD/litre)
Wine red	2020	427	$2,162	$5.06
	Change	-13	-$64	$0.01
	% change	-3%	-3%	0%
	Share	57%	75%	
Wine white	2020	288	$598	$2.08
	Change	10	$25	$0.01
	% change	4%	4%	1%
	Share	39%	21%	
Wine rosé	2020	17	$45	$2.58
	Change	3.3	$6	-$0.20
	% change	24%	15%	-7%
	Share	2%	2%	
Sparkling wine	2020	5.3	$31	$5.85
	Change	-0.7	-$5	-$0.04
	% change	-12%	-13%	-1%
	Share	1%	1%	
Semi-carbonated	2020	3.4	$20	$5.73
	Change	2.7	$11	-$5.59
	% change	377%	141%	-49%
	Share	0.5%	1%	
Other	2020	5.6	$32	$5.67
	Change	0.9	$3	-$0.43
	% change	19%	11%	-7%
	Share	0.7%	1%	
Total	2020	747	$2,887	$3.87
	Change	3	-$23	-$0.05
	% change	0.5%	-1%	-1%



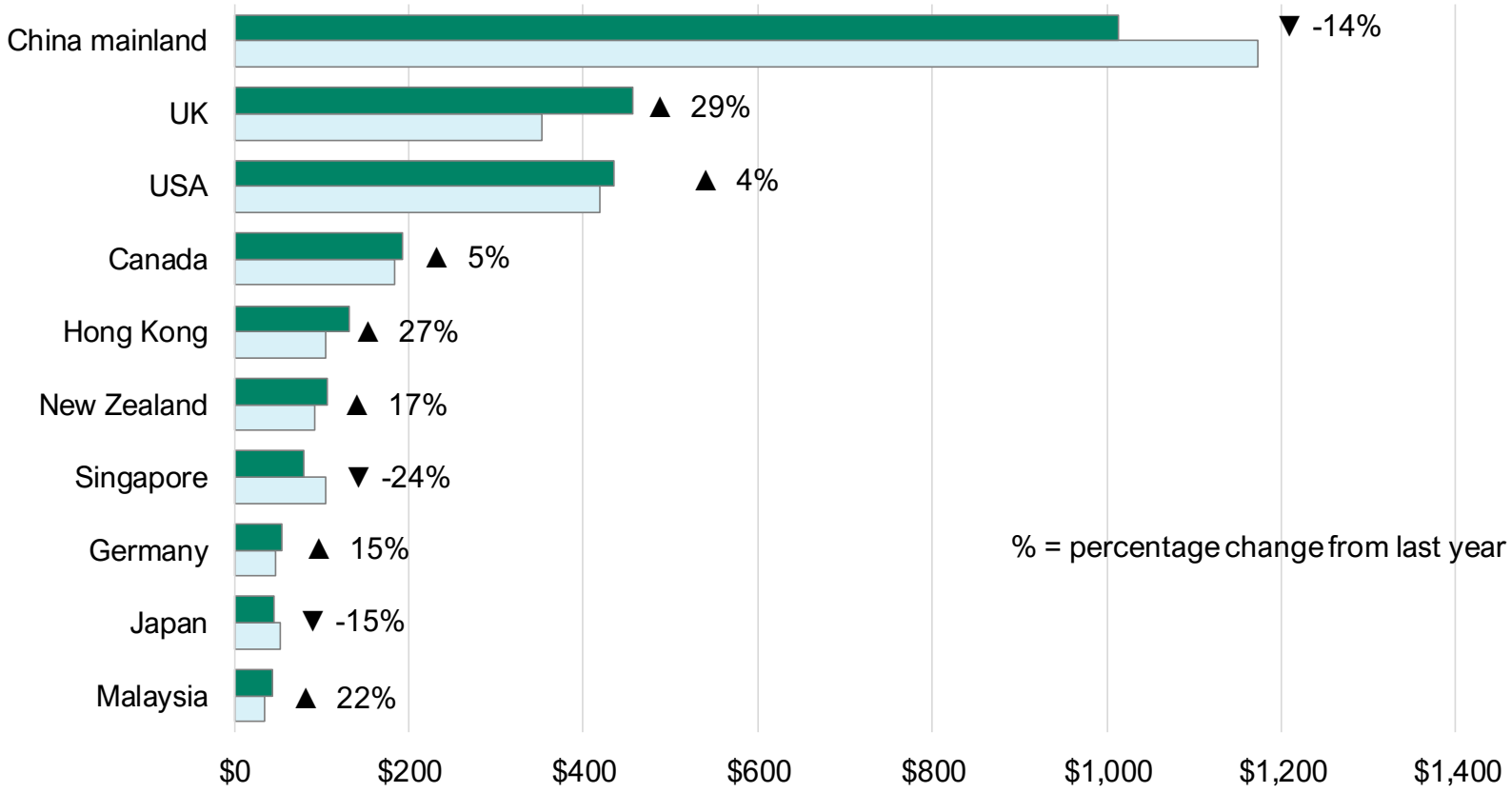
Exports by market, container and colour – value ('000 AUD)

	Red						White											
	Unpackaged		Glass bottle		Other		Unpackaged		Glass bottle		Other		Sparkling		Other		Total	
Destination Market	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change
China mainland	$51,634	▲ 6%	$923,823	▼ -14%	$266	▼ -78%	$266	▼ -85%	$21,874	▼ -15%	$114	▼ -7%	$1,774	▼ -2%	$14,138	▼ -21%	$1,013,890	▼ -14%
UK	$179,098	▲ 39%	$95,258	▲ 21%	$0	▼ -100%	$98,081	▲ 30%	$66,582	▲ 16%	$5	▼ -55%	$4,040	▲ 4%	$12,890	▲ 57%	$455,955	▲ 29%
USA	$34,152	▲ 19%	$193,635	▼ -1%	$0	na	$40,611	▲ 3%	$150,558	▲ 5%	$0	na	$2,427	▼ -27%	$13,055	▲ 50%	$434,439	▲ 4%
Canada	$17,115	▲ 17%	$94,908	▲ 1%	$313	▲ 58%	$18,199	▼ -9%	$36,995	▼ -14%	$810	▲ 29%	$3,496	▲ 0%	$20,048	▲ 160%	$191,884	▲ 5%
Hong Kong	$36	▼ -50%	$119,315	▲ 31%	$1,615	▲ 15%	$0	na	$7,487	▼ -12%	$378	▲ 27%	$958	▲ 24%	$2,137	▼ -13%	$131,926	▲ 27%
New Zealand	$9,624	▼ -18%	$61,278	▲ 23%	$1,045	▲ 57%	$9,236	▲ 30%	$11,558	▲ 26%	$517	▲ 31%	$4,925	▲ 3%	$8,786	▲ 11%	$106,969	▲ 17%
Singapore	$0	na	$68,825	▼ -24%	$292	▲ 20%	$0	na	$6,652	▼ -11%	$57	▼ -40%	$2,339	▼ -52%	$1,453	▼ -1%	$79,618	▼ -24%
Germany	$23,488	▲ 25%	$9,555	▼ -5%	$0	na	$17,845	▲ 6%	$1,732	▲ 48%	$0	na	$96	▼ -18%	$2,142	▲ 137%	$54,856	▲ 15%
Japan	$2,978	▼ -45%	$16,623	▼ -12%	$2,761	▲ 5%	$2,513	▼ -21%	$10,025	▼ -15%	$1,200	▲ 17%	$4,021	▼ -10%	$4,505	▼ -12%	$44,626	▼ -15%
Malaysia	$0	na	$40,036	▲ 25%	$62	▼ -25%	$0	na	$2,536	▼ -8%	$6	▲ 16%	$85	▼ -16%	$517	▲ 17%	$43,241	▲ 22%
Netherlands	$3,006	▼ -23%	$12,681	▼ -14%	$0	na	$4,684	▼ -26%	$13,883	▼ -10%	$0	na	$1,015	▲ 9%	$1,756	▲ 13%	$37,025	▼ -14%
Denmark	$15,756	▲ 48%	$7,535	▲ 5%	$0	na	$6,639	▲ 27%	$3,790	▲ 39%	$0	na	$341	▼ -16%	$2,935	▲ 46%	$36,996	▲ 31%
South Korea	$0	na	$19,383	▲ 28%	$1,913	▲ 56%	$0	na	$4,145	▲ 71%	$287	▲ 358%	$361	▲ 26%	$863	▲ 52%	$26,951	▲ 37%
Sweden	$1,737	▲ 45%	$13,676	▲ 8%	$0	na	$1,735	▲ 84%	$5,153	▲ 4%	$0	na	$1,295	▲ 40%	$1,576	▲ 51%	$25,173	▲ 16%
Thailand	$498	▼ -12%	$16,751	▲ 1%	$728	▲ 62%	$134	▼ -51%	$2,139	▼ -45%	$190	▲ 72%	$965	▼ -12%	$274	▼ -17%	$21,678	▼ -7%
Taiwan	$0	na	$14,923	▼ -5%	$589	▲ 70%	$0	na	$1,815	▲ 39%	$226	▲ 104%	$195	▲ 62%	$947	▲ 100%	$18,695	▲ 4%
Belgium	$4,138	▲ 13%	$4,196	▲ 0%	$0	na	$4,978	▼ -1%	$3,421	▲ 23%	$0	na	$360	▼ -14%	$865	▼ -7%	$17,958	▲ 6%
France	$6,957	▲ 24%	$3,060	▲ 33%	$0	na	$4,776	▲ 49%	$1,075	▲ 15%	$17	▼ -55%	$18	▲ 158%	$501	▲ 18%	$16,404	▲ 31%
Finland	$2,432	▼ -27%	$4,655	▲ 15%	$0	na	$2,745	▲ 23%	$2,092	▲ 3%	$0	na	$194	▼ -21%	$967	▼ -9%	$13,084	▲ 1%
Indonesia	$0	na	$12,229	▲ 9%	$0	▼ -100%	$0	na	$536	▼ -71%	$0	na	$54	▼ -79%	$193	▼ -41%	$13,012	▼ -4%
Ireland	$484	▲ 69%	$6,410	▲ 36%	$0	na	$621	▲ 83%	$5,101	▲ 36%	$0	na	$180	▲ 42%	$143	▲ 10%	$12,940	▲ 38%
UAE	$0	na	$8,507	▼ -63%	$538	▼ -9%	$0	na	$2,158	▼ -69%	$301	▼ -31%	$324	▼ -50%	$647	▼ -42%	$12,475	▼ -62%
Norway	$1,718	▲ 52%	$3,498	▲ 55%	$60	▲ 97%	$55	na	$2,361	▲ 47%	$0	na	$598	▲ 43%	$406	▲ 47%	$8,696	▲ 52%
Russia	$0	▼ -100%	$4,946	▲ 33%	$0	na	$103	na	$3,483	▲ 42%	$0	na	$104	▼ -45%	$46	▲ 80%	$8,682	▲ 34%
Philippines	$0	na	$5,813	▼ -38%	$2	▲ 83%	$0	na	$1,673	▼ -28%	$0	▼ -100%	$18	▼ -26%	$1,096	▼ -1%	$8,601	▼ -33%
Rest of world	$1,875	▼ -15%	$32,877	▼ -23%	$663	▼ -52%	$1,177	▲ 4%	$10,094	▼ -31%	$582	▼ -35%	$921	▼ -52%	$3,435	▼ -9%	$51,622	▼ -25%
Total	$356,726	▲ 23%	$1,794,394	▼ -7%	$10,848	▲ 4%	$214,399	▲ 14%	$378,917	▼ -0%	$4,692	▲ 11%	$31,103	▼ -13%	$96,319	▲ 27%	$2,887,396	▼ -1%

Exports by country, container and colour – volume (‘000 L)

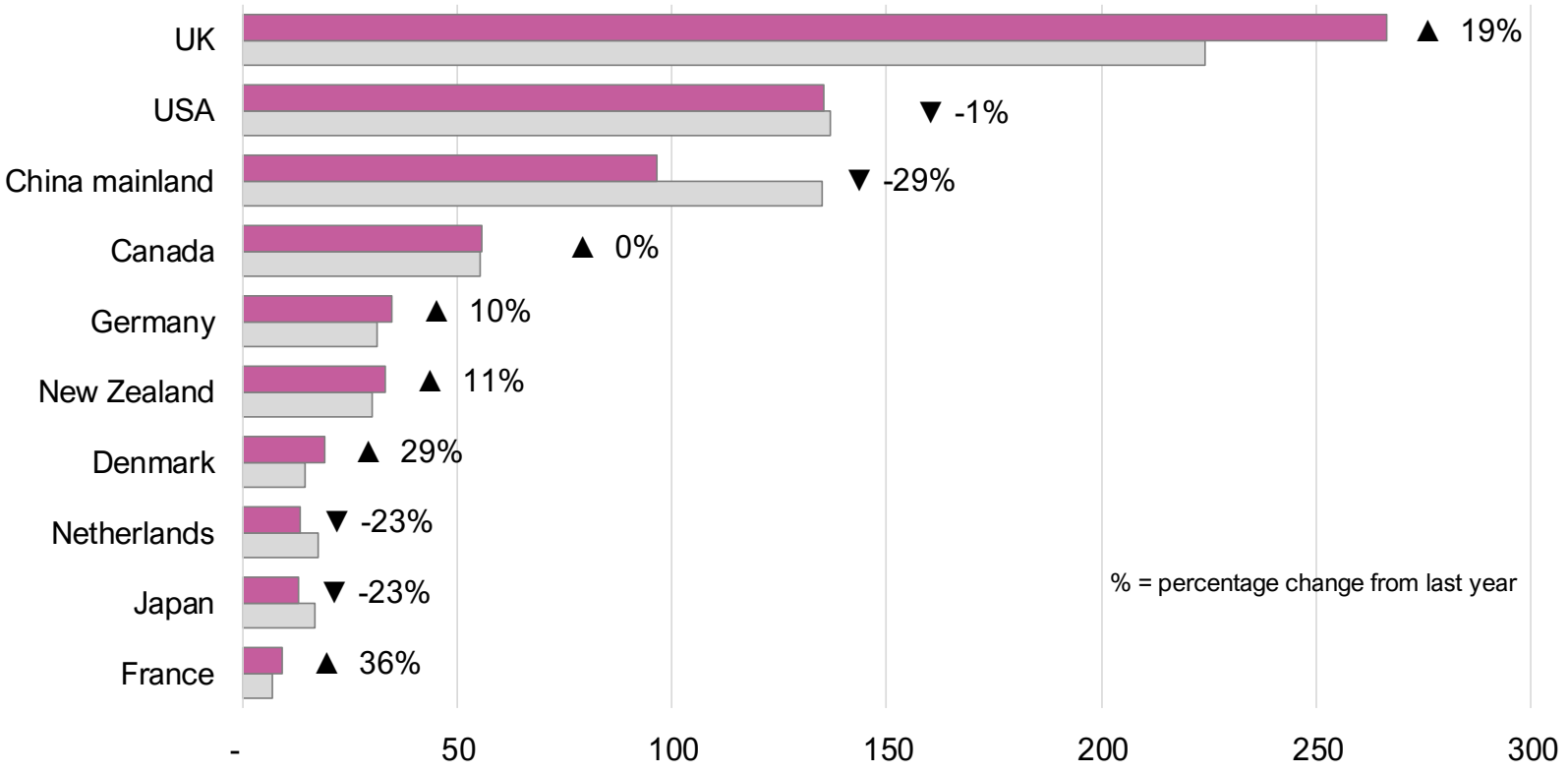
	Red						White									
	Unpackaged		Glass bottle		Other		Unpackaged		Glass bottle		Other		Sparkling		Other		Total	
Destination Market	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change
UK	127,899	▲ 19%	19,112	▲ 20%	-	▼ -100%	93,338	▲ 18%	17,904	▲ 14%	1	▼ -30%	732	▼ -10%	7,436	▲ 50%	266,422	▲ 19%
USA	17,923	▲ 2%	41,864	▼ -1%	-	na	33,524	▼ -11%	38,708	▲ 4%	-	na	368	▼ -32%	3,110	▲ 54%	135,497	▼ -1%
China mainland	16,925	▼ -15%	73,268	▼ -32%	96	▼ -77%	216	▼ -77%	3,283	▼ -19%	33	▼ -18%	168	▼ -26%	2,418	▲ 0%	96,408	▼ -29%
Canada	12,261	▲ 11%	14,902	▲ 1%	93	▲ 55%	16,446	▼ -12%	7,539	▼ -14%	265	▲ 58%	565	▼ -1%	3,587	▲ 148%	55,658	▲ 0%
Germany	14,375	▲ 15%	1,538	▼ -21%	-	na	17,355	▲ 7%	357	▲ 41%	-	na	7	▼ -39%	1,177	▲ 89%	34,809	▲ 10%
New Zealand	5,439	▼ -17%	11,643	▲ 23%	489	▲ 47%	8,905	▲ 13%	3,543	▲ 24%	240	▲ 29%	963	▲ 4%	2,053	▲ 12%	33,276	▲ 11%
Denmark	9,878	▲ 40%	898	▼ -1%	-	na	5,846	▲ 19%	743	▲ 13%	-	na	94	▲ 7%	1,528	▲ 44%	18,986	▲ 29%
Netherlands	1,972	▼ -28%	2,812	▼ -25%	-	na	4,249	▼ -29%	3,771	▼ -15%	-	na	217	▲ 19%	515	▲ 18%	13,536	▼ -23%
Japan	2,221	▼ -46%	2,935	▼ -15%	1,373	▲ 1%	2,259	▼ -24%	1,899	▼ -11%	658	▲ 3%	765	▼ -13%	834	▼ -28%	12,943	▼ -23%
France	4,464	▲ 29%	97	▼ -4%	-	na	4,217	▲ 46%	69	▲ 17%	3	▼ -56%	1	▲ 109%	394	▲ 38%	9,244	▲ 36%
Belgium	2,778	▲ 5%	414	▼ -29%	-	na	4,636	▼ -9%	655	▲ 23%	-	na	52	▼ -20%	317	▼ -5%	8,852	▼ -4%
Hong Kong	24	▼ -51%	5,547	▲ 4%	573	▲ 14%	-	na	1,007	▲ 3%	153	▲ 31%	107	▲ 10%	149	▲ 16%	7,559	▲ 5%
Sweden	922	▲ 80%	2,263	▼ -3%	-	na	962	▲ 111%	1,158	▼ -10%	0	na	321	▲ 32%	620	▲ 32%	6,246	▲ 18%
Singapore	-	na	4,205	▼ -24%	139	▲ 6%	-	na	839	▼ -10%	23	▼ -49%	278	▼ -53%	173	▼ -1%	5,657	▼ -24%
Finland	1,585	▼ -17%	599	▲ 0%	-	na	2,472	▲ 21%	377	▼ -5%	-	na	26	▲ 19%	304	▼ -11%	5,363	▲ 1%
South Korea	-	na	2,340	▲ 19%	753	▲ 33%	-	na	642	▲ 71%	91	▲ 255%	45	▲ 24%	102	▲ 36%	3,972	▲ 31%
Ireland	286	▲ 58%	1,563	▲ 42%	-	na	337	▲ 44%	1,524	▲ 32%	-	na	35	▲ 62%	35	▼ -1%	3,780	▲ 39%
Thailand	335	▼ -18%	1,843	▼ -18%	312	▲ 44%	120	▼ -50%	455	▼ -46%	84	▲ 65%	170	▲ 3%	44	▼ -27%	3,363	▼ -21%
Malaysia	-	na	2,375	▲ 6%	32	▼ -32%	-	na	447	▼ -2%	3	▲ 19%	9	▼ -32%	85	▲ 7%	2,951	▲ 4%
Norway	1,128	▲ 47%	781	▲ 54%	20	▲ 74%	24	na	539	▲ 51%	-	na	139	▲ 71%	82	▲ 39%	2,713	▲ 52%
Taiwan	-	na	1,675	▲ 7%	269	▲ 74%	-	na	286	▲ 31%	94	▲ 96%	23	▲ 48%	158	▲ 133%	2,503	▲ 21%
UAE	-	na	1,054	▼ -42%	310	▼ -5%	-	na	483	▼ -62%	184	▼ -33%	56	▼ -39%	183	▼ -34%	2,269	▼ -44%
Russia	-	▼ -100%	850	▲ 16%	-	na	48	na	898	▲ 40%	-	na	20	▼ -38%	9	▲ 76%	1,824	▲ 25%
Philippines	-	na	833	▼ -53%	0	▲ 83%	-	na	377	▼ -33%	-	▼ -100%	2	▼ -34%	246	▼ -6%	1,458	▼ -44%
India	-	na	1,018	▼ -7%	8	▼ -41%	-	na	365	▼ -20%	6	▼ -46%	16	▼ -47%	26	▼ -6%	1,438	▼ -12%
Rest of world	900	▼ -22%	4,608	▼ -27%	362	▼ -32%	943	▼ -6%	2,091	▼ -29%	294	▼ -23%	139	▼ -57%	826	▼ -5%	10,161	▼ -25%
Total	221,312	▲ 10%	201,034	▼ -14%	4,829	▲ 3%	195,896	▲ 5%	89,958	▲ 0%	2,134	▲ 7%	5,315	▼ -12%	26,411	▲ 36%	746,889	▲ 0%

Exports by top 10 destinations - value



	Malaysia	Japan	Germany	Singapore	New Zealand	Hong Kong	Canada	USA	UK	China mainland
2020	$43	$45	$55	$80	$107	$132	$192	$434	$456	$1,014
2019	$35	$53	$48	$105	$92	$104	$183	$419	$352	$1,173

Exports by top 10 destinations - volume



	France	Japan	Netherlands	Denmark	New Zealand	Germany	Canada	China mainland	USA	UK
2020	9	13	14	19	33	35	56	96	136	266
2019	7	17	18	15	30	32	55	135	137	224

Million litres

Bottled wine exports

Bottled exports by price segment and destination	22
Bottled exports by wine style	24
Bottled exports by top destinations	27
Botted exports by top variety label claims	30
Bottled exports by top GI label claims	34
Bottled exports by price segment	38

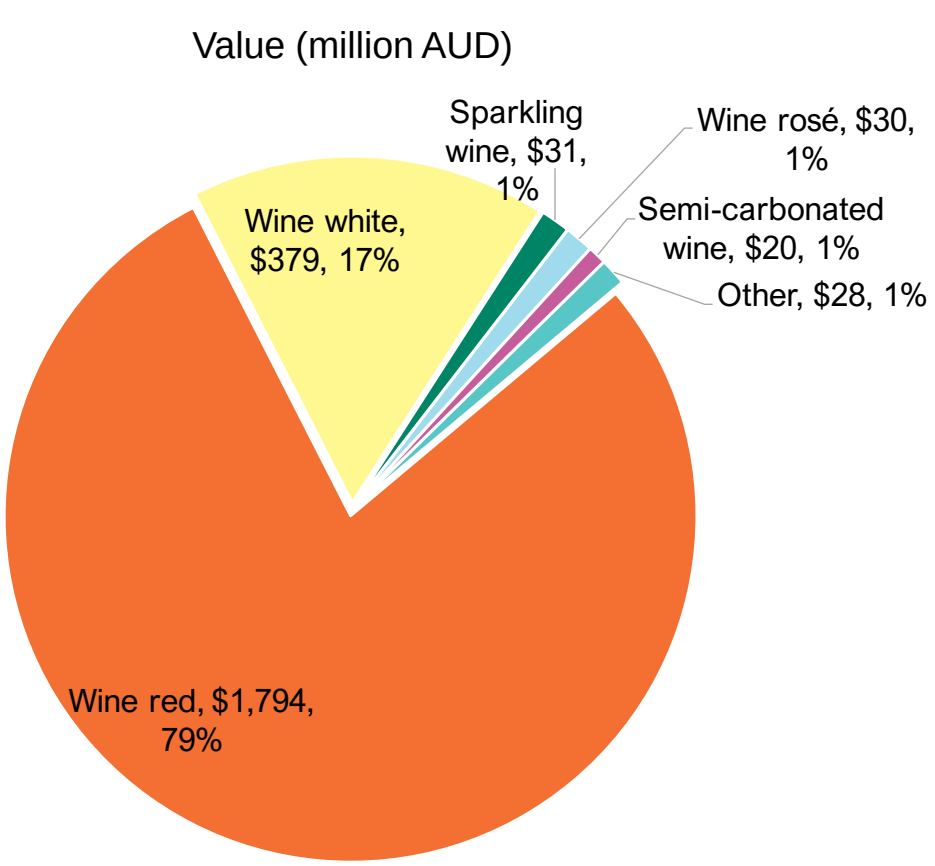
Bottled exports by price segment and destination - value ('000 AUD)

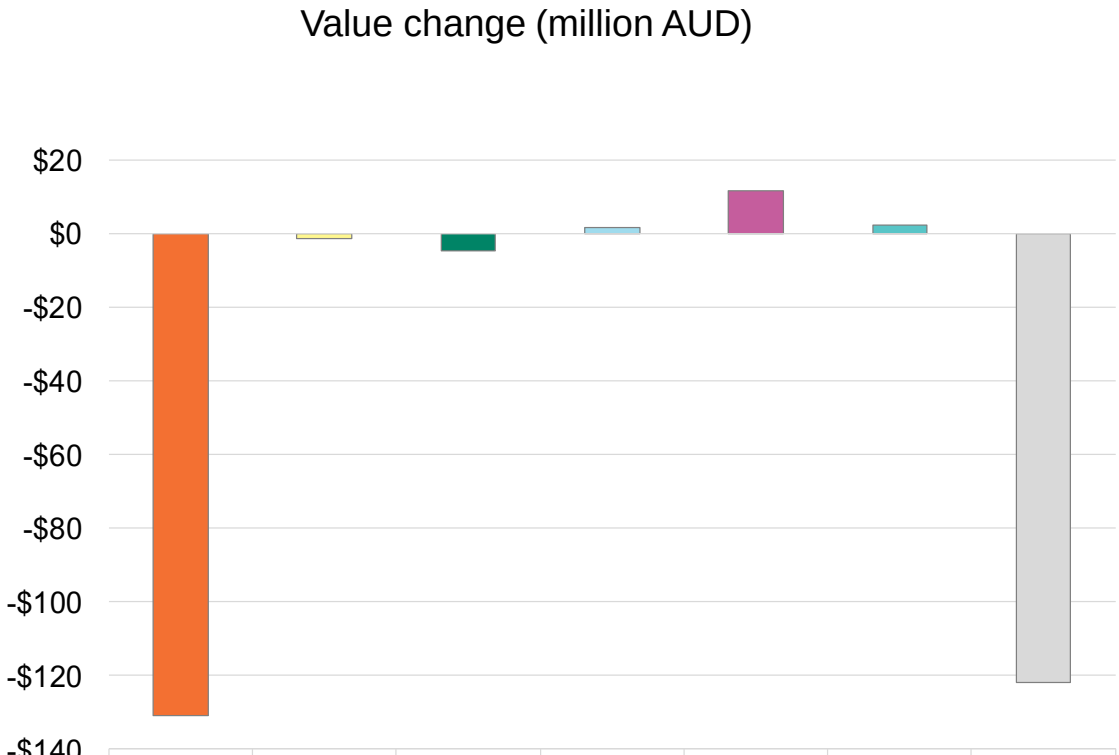
	$2.49 and under		$2.50 to $4.99		$5.00 to $7.49		$7.50 to $9.99		$10.00 to $14.99		$15.00 to $19.99		$20.00 to $29.99		$30.00 to $49.99		$50.00 and above		Total	
Destination market	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change
China mainland	$2,694	▼ -19%	$130,503	▼ -34%	$95,765	▼ -40%	$49,017	▼ -18%	$90,398	▼ -30%	$51,691	▼ -1%	$136,533	▼ -9%	$71,958	▼ -32%	$332,879	▲ 26%	$961,439	▼ -14%
USA	$2,995	▼ -52%	$284,789	▲ 8%	$21,838	▲ 1%	$9,737	▼ -41%	$17,769	▼ -8%	$4,429	▼ -41%	$10,156	▲ 26%	$3,469	▼ -11%	$3,911	▲ 6%	$359,092	▲ 2%
UK	$1,328	▼ -29%	$104,380	▲ 24%	$24,749	▲ 9%	$15,470	▲ 20%	$11,161	▲ 10%	$2,933	▼ -4%	$3,132	▲ 5%	$3,954	▲ 23%	$3,722	▲ 87%	$170,829	▲ 19%
Canada	$72	▲ 254%	$36,665	▼ -6%	$73,288	▲ 12%	$20,334	▲ 11%	$19,554	▼ -2%	$2,200	▲ 13%	$968	▼ -20%	$931	▼ -21%	$670	▲ 9%	$154,683	▲ 5%
Hong Kong	$208	▲ 1538%	$10,216	▲ 10%	$8,130	▲ 7%	$3,146	▼ -13%	$11,852	▼ -29%	$3,239	▼ -33%	$8,094	▼ -18%	$11,713	▲ 41%	$73,264	▲ 74%	$129,863	▲ 27%
New Zealand	$1,016	▲ 23%	$41,854	▲ 15%	$22,614	▲ 25%	$12,083	▲ 39%	$5,203	▲ 29%	$1,030	▲ 25%	$822	▼ -2%	$648	▲ 68%	$773	▼ -26%	$86,042	▲ 21%
Singapore	$65	▼ -61%	$7,256	▼ -19%	$6,739	▼ -7%	$5,623	▼ -35%	$8,280	▼ -28%	$2,320	▼ -9%	$13,028	▼ -45%	$6,149	▼ -34%	$29,795	▼ -8%	$79,256	▼ -24%
Malaysia	$3	▼ -94%	$4,445	▼ -6%	$3,084	▲ 1%	$1,264	▼ -17%	$3,791	▲ 25%	$920	▲ 50%	$9,777	▲ 6%	$2,225	▲ 14%	$17,665	▲ 57%	$43,173	▲ 22%
Japan	$268	▼ -29%	$14,694	▼ -20%	$7,166	▲ 36%	$4,079	▼ -21%	$2,468	▼ -46%	$976	▼ -41%	$964	▼ -33%	$781	▲ 8%	$1,135	▲ 133%	$32,530	▼ -14%
Netherlands	$242	▲ 112%	$19,745	▼ -16%	$5,954	▼ -8%	$1,082	▼ -16%	$1,398	▲ 56%	$128	▼ -5%	$133	▲ 26%	$298	▲ 78%	$170	▲ 48%	$29,151	▼ -11%
South Korea	$8	▼ -24%	$3,566	▲ 2%	$7,401	▲ 37%	$3,628	▲ 96%	$3,152	▲ 45%	$2,723	▲ 48%	$1,260	▲ 37%	$1,721	▲ 41%	$1,258	▼ -14%	$24,716	▲ 34%
Sweden	$0	▼ -100%	$9,868	▼ -6%	$4,424	▲ 35%	$3,099	▲ 7%	$2,722	▲ 79%	$404	▲ 26%	$263	▲ 73%	$353	▲ 36%	$155	▲ 44%	$21,288	▲ 11%
Thailand	$8	▼ -93%	$5,609	▼ -35%	$2,336	▲ 4%	$1,782	▼ -4%	$1,556	▲ 13%	$307	▼ -3%	$2,836	▼ -6%	$1,054	▲ 111%	$4,642	▲ 23%	$20,129	▼ -8%
Taiwan	$3	▼ -95%	$5,291	▲ 15%	$2,835	▲ 66%	$911	▼ -11%	$1,076	▼ -12%	$927	▲ 8%	$2,458	▲ 53%	$1,430	▼ -31%	$2,948	▼ -33%	$17,879	▲ 2%
Indonesia	$0	na	$375	▼ -75%	$1,005	▼ -36%	$255	▼ -74%	$448	▼ -42%	$409	▼ -57%	$2,011	▲ 50%	$1,115	▼ -4%	$7,393	▲ 39%	$13,012	▼ -4%
Denmark	$391	▲ 7%	$3,080	▲ 4%	$999	▼ -34%	$1,935	▲ 25%	$3,295	▲ 45%	$709	▼ -15%	$607	▲ 7%	$1,153	▲ 81%	$566	▲ 41%	$12,735	▲ 15%
Germany	$500	▼ -69%	$3,409	▲ 5%	$2,768	▲ 15%	$1,744	▲ 45%	$1,641	▲ 6%	$779	▲ 80%	$288	▲ 18%	$399	▼ -14%	$550	▲ 37%	$12,078	▲ 5%
Ireland	$118	▼ -83%	$9,253	▲ 71%	$1,085	▼ -7%	$447	▲ 32%	$655	▼ -15%	$91	▼ -24%	$25	▼ -82%	$133	▲ 70%	$28	▼ -13%	$11,835	▲ 36%
UAE	$1	▼ -93%	$3,529	▼ -47%	$2,657	▼ -39%	$772	▼ -74%	$1,377	▼ -49%	$53	▼ -93%	$1,157	▼ -61%	$798	▼ -65%	$1,113	▼ -87%	$11,457	▼ -63%
Belgium	$54	▲ 1%	$3,713	▲ 74%	$986	▼ -65%	$653	▼ -42%	$706	▼ -35%	$689	▲ 162%	$491	▲ 181%	$601	▲ 193%	$795	▲ 231%	$8,689	▲ 7%
Philippines	$16	▼ -28%	$4,542	▼ -47%	$936	▼ -42%	$542	▲ 22%	$328	▼ -14%	$154	▲ 53%	$454	▲ 0%	$226	▼ -10%	$1,400	▲ 40%	$8,597	▼ -33%
Russia	$3	▼ -99%	$4,473	▲ 39%	$1,759	▲ 60%	$482	▲ 4%	$538	▼ -5%	$490	▼ -0%	$131	▲ 50%	$402	▲ 137%	$300	▲ 338%	$8,579	▲ 35%
Finland	$53	▲ 80%	$1,433	▼ -15%	$2,122	▲ 8%	$2,066	▲ 6%	$1,865	▲ 75%	$71	▼ -24%	$84	▲ 151%	$6	▼ -57%	$16	▼ -60%	$7,717	▲ 12%
Norway	$15	▲ 127%	$4,353	▲ 55%	$1,045	▲ 82%	$637	▲ 47%	$235	▼ -24%	$142	▼ -10%	$252	▲ 55%	$111	▲ 97%	$73	▲ 59%	$6,863	▲ 51%
India	$18	▼ -56%	$5,185	▼ -15%	$567	▲ 99%	$160	▲ 355%	$8	▼ -94%	$0	▼ -99%	$89	▲ 248%	$59	▲ 845%	$432	▲ 7309%	$6,517	▼ -2%
Rest of world	$725	▲ 10%	$15,263	▼ -17%	$7,071	▼ -46%	$3,555	▼ -35%	$5,699	▼ -35%	$1,523	▼ -47%	$3,462	▲ 31%	$2,266	▼ -7%	$5,004	▲ 4%	$44,567	▼ -25%
Total	$10,804	▼ -37%	$737,488	▼ -5%	$309,324	▼ -14%	$144,502	▼ -10%	$197,175	▼ -20%	$79,337	▼ -7%	$199,475	▼ -10%	$113,953	▼ -22%	$490,659	▲ 26%	$2,282,716	▼ -5%

Bottled exports by price segment and destination – volume ('000 L)

	$2.49 and under		$2.50 to $4.99		$5.00 to $7.49		$7.50 to $9.99		$10.00 to $14.99		$15.00 to $19.99		$20.00 to $29.99		$30.00 to $49.99		$50.00 and above		Total	
Destination market	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change
USA	1,321	▼ -49%	75,467	▲ 6%	3,756	▲ 2%	1,079	▼ -41%	1,499	▼ -8%	266	▼ -44%	404	▲ 20%	88	▼ -16%	46	▲ 18%	83,926	▲ 3%
China mainland	1,261	▼ -17%	34,135	▼ -35%	16,063	▼ -41%	5,537	▼ -19%	7,710	▼ -29%	2,976	▼ -4%	5,457	▼ -9%	1,980	▼ -32%	3,994	▲ 32%	79,111	▼ -30%
UK	576	▼ -31%	30,782	▲ 20%	4,182	▲ 9%	1,787	▲ 20%	960	▲ 8%	169	▼ -8%	129	▲ 4%	111	▲ 23%	36	▲ 54%	38,732	▲ 17%
Canada	32	▲ 191%	9,734	▼ -7%	12,020	▲ 13%	2,405	▲ 12%	1,686	▼ -3%	126	▲ 13%	41	▼ -21%	25	▼ -21%	8	▲ 11%	26,077	▲ 4%
New Zealand	444	▲ 25%	11,737	▲ 18%	3,749	▲ 25%	1,416	▲ 39%	460	▲ 31%	61	▲ 25%	35	▲ 0%	17	▲ 62%	12	▼ -30%	17,930	▲ 21%
Netherlands	118	▲ 90%	5,865	▼ -20%	936	▼ -12%	130	▼ -16%	118	▲ 62%	7	▼ -7%	6	▲ 25%	8	▲ 69%	2	▲ 65%	7,191	▼ -18%
Hong Kong	97	▲ 1283%	2,547	▲ 13%	1,329	▲ 10%	365	▼ -14%	994	▼ -29%	191	▼ -32%	326	▼ -21%	320	▲ 44%	633	▲ 103%	6,801	▲ 4%
Japan	122	▼ -25%	3,811	▼ -21%	1,231	▲ 37%	488	▼ -17%	205	▼ -47%	56	▼ -41%	42	▼ -31%	21	▲ 10%	7	▲ 31%	5,984	▼ -15%
Singapore	30	▼ -61%	1,734	▼ -19%	1,135	▼ -8%	668	▼ -35%	701	▼ -26%	137	▼ -8%	553	▼ -44%	175	▼ -36%	360	▼ -10%	5,493	▼ -24%
Sweden	1	▼ -99%	2,611	▼ -9%	762	▲ 37%	349	▲ 7%	234	▲ 83%	24	▲ 23%	11	▲ 72%	9	▲ 36%	2	▲ 58%	4,003	▼ -1%
Ireland	62	▼ -79%	2,788	▲ 65%	186	▼ -9%	52	▲ 33%	59	▼ -17%	5	▼ -22%	1	▼ -82%	4	▲ 69%	0	▲ 13%	3,157	▲ 37%
South Korea	6	▲ 3%	956	▲ 2%	1,222	▲ 33%	406	▲ 93%	264	▲ 46%	156	▲ 47%	53	▲ 35%	47	▲ 43%	14	▲ 3%	3,124	▲ 28%
Malaysia	2	▼ -89%	1,160	▼ -3%	517	▲ 1%	148	▼ -14%	329	▲ 26%	54	▲ 48%	422	▲ 9%	65	▲ 21%	218	▲ 55%	2,916	▲ 5%
Thailand	6	▼ -89%	1,536	▼ -35%	402	▲ 9%	215	▼ -3%	134	▲ 16%	18	▲ 0%	119	▼ -4%	29	▲ 110%	53	▲ 23%	2,511	▼ -24%
Taiwan	2	▼ -93%	1,242	▲ 12%	480	▲ 69%	111	▼ -10%	87	▼ -15%	54	▲ 8%	103	▲ 55%	38	▼ -33%	25	▼ -45%	2,141	▲ 15%
Germany	246	▼ -65%	937	▲ 7%	434	▲ 17%	197	▲ 42%	139	▲ 2%	43	▲ 70%	12	▲ 12%	11	▼ -18%	5	▲ 53%	2,024	▼ -11%
Denmark	194	▲ 9%	966	▲ 4%	163	▼ -32%	215	▲ 24%	279	▲ 44%	40	▼ -14%	25	▲ 4%	28	▲ 62%	8	▲ 69%	1,919	▲ 6%
Russia	1	▼ -99%	1,316	▲ 35%	307	▲ 64%	55	▲ 2%	48	▼ -8%	30	▼ -6%	5	▲ 53%	11	▲ 118%	3	▲ 466%	1,776	▲ 26%
UAE	1	▼ -91%	943	▼ -43%	448	▼ -41%	89	▼ -74%	124	▼ -48%	3	▼ -92%	52	▼ -59%	22	▼ -66%	9	▼ -90%	1,691	▼ -49%
Norway	8	▲ 206%	1,249	▲ 54%	173	▲ 69%	68	▲ 42%	19	▼ -26%	8	▼ -7%	11	▲ 72%	3	▲ 101%	1	▲ 53%	1,541	▲ 53%
Philippines	7	▼ -30%	1,142	▼ -47%	166	▼ -42%	61	▲ 22%	28	▼ -17%	9	▲ 54%	18	▼ -1%	7	▼ -8%	18	▲ 48%	1,457	▼ -44%
India	21	▲ 4%	1,265	▼ -17%	107	▲ 118%	18	▲ 364%	1	▼ -95%	0	▼ -99%	4	▲ 316%	2	▲ 1039%	6	▲ 44300%	1,425	▼ -11%
Belgium	30	▲ 26%	853	▲ 55%	157	▼ -68%	77	▼ -42%	59	▼ -37%	40	▲ 164%	20	▲ 179%	15	▲ 207%	11	▲ 316%	1,262	▼ -4%
Finland	27	▲ 128%	377	▼ -20%	364	▲ 10%	230	▲ 2%	152	▲ 76%	4	▼ -28%	4	▲ 139%	0	▼ -65%	0	▼ -48%	1,159	▲ 2%
Poland	2	na	857	▼ -1%	27	▼ -36%	16	▼ -38%	8	▼ -21%	1	▼ -76%	1	▼ -59%	0	▼ -69%	0	▼ -94%	913	▼ -4%
Rest of world	394	▲ 35%	3,430	▼ -24%	1,387	▼ -45%	430	▼ -41%	543	▼ -34%	113	▼ -50%	244	▲ 46%	95	▼ -4%	132	▲ 9%	6,767	▼ -29%
Total	5,012	▼ -33%	199,440	▼ -6%	51,703	▼ -15%	16,613	▼ -10%	16,840	▼ -19%	4,592	▼ -10%	8,098	▼ -10%	3,129	▼ -23%	5,605	▲ 30%	311,032	▼ -9%

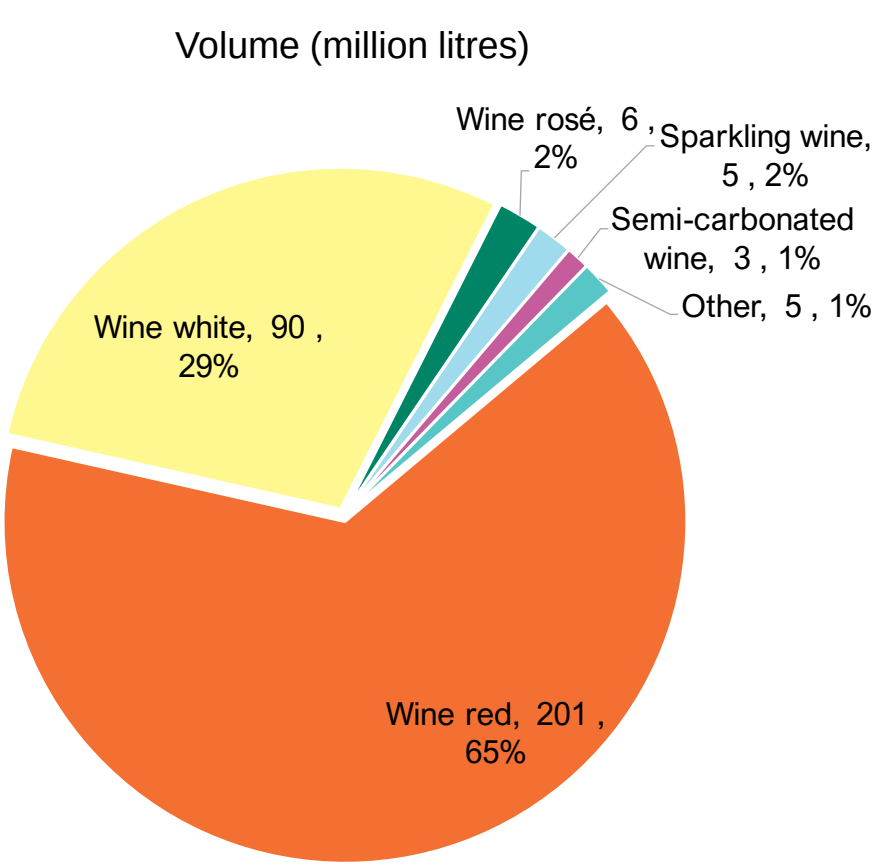
Bottled exports by wine style – value

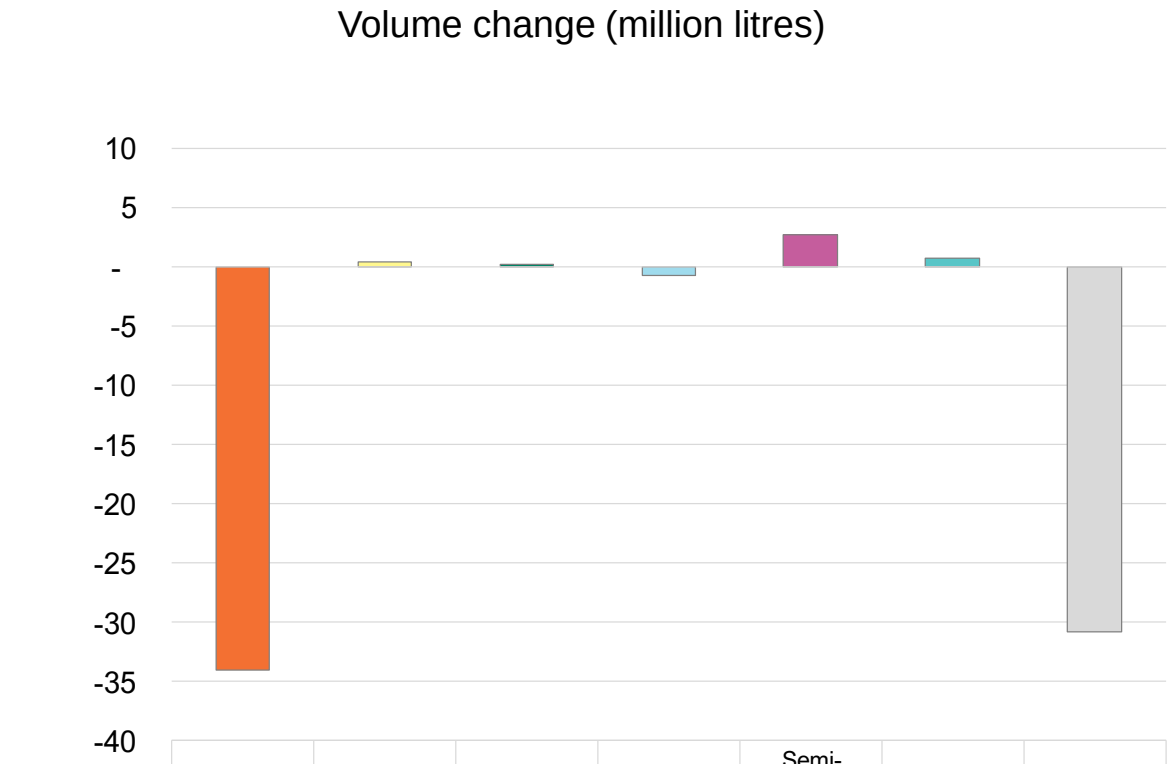




	Wine red	Wine white	Sparkling wine	Wine rosé	Semi-carbonated wine	Other	Total
Value change	-$131	-$1	-$5	$1	$11	$2	-$122
% change	▼ -7%	▼ -0%	▼ -13%	▲ 5%	▲ 141%	▲ 8%	▼ -5%

Bottled exports by wine style - volume

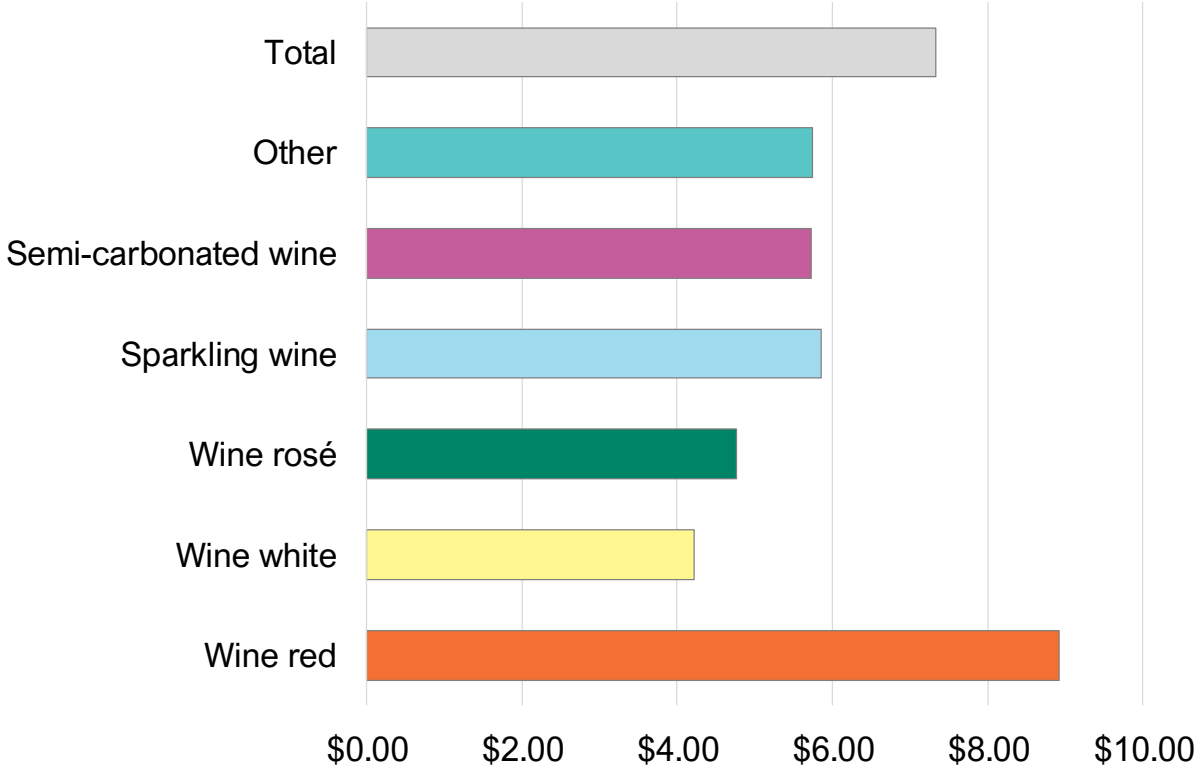




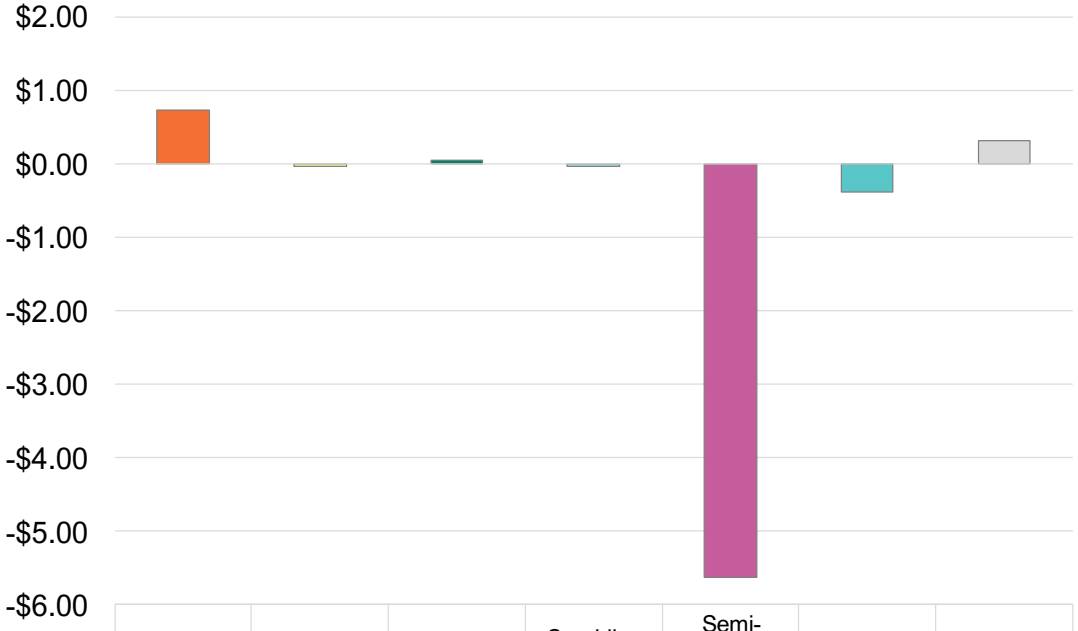
	Wine red	Wine white	Wine rosé	Sparkling wine	Semi-carbonated wine	Other	Total
Volume change	-34	0	0.2	-1	2.7	0.7	-31
% change	▼ -14%	▲ 0%	▲ 4%	▼ -12%	▲ 379%	▲ 16%	▼ -9%

Bottled exports by wine style – average value

Average value (AUD per litre)

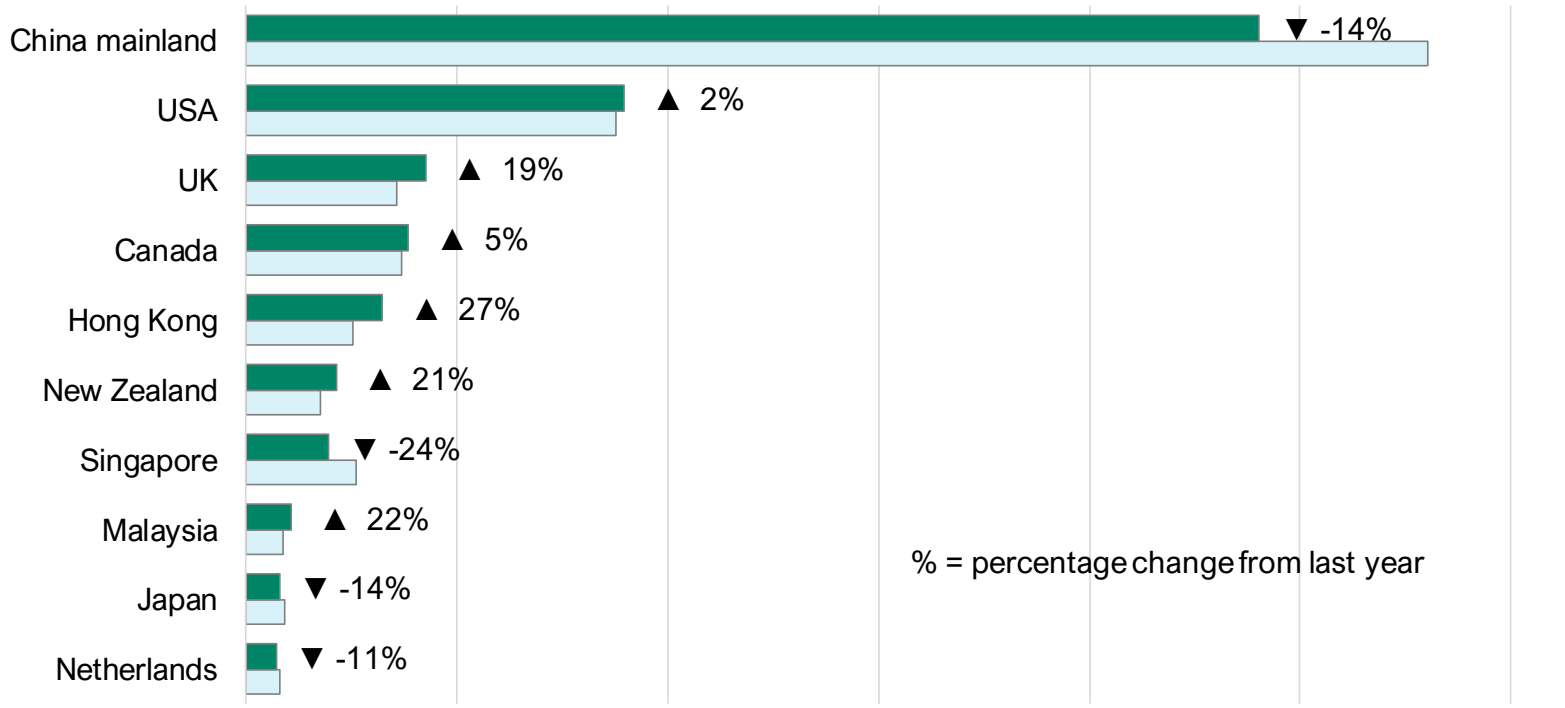


Average value change (AUD per litre)



	Wine red	Wine white	Wine rosé	Sparkling wine	Semi-carbonated wine	Other	Total
Ave. value change	$0.74	-$0.03	$0.05	-$0.04	-$5.63	-$0.39	$0.30
% change	▲ 9%	▼ -1%	▲ 1%	▼ -1%	▼ -50%	▼ -6%	▲ 4%

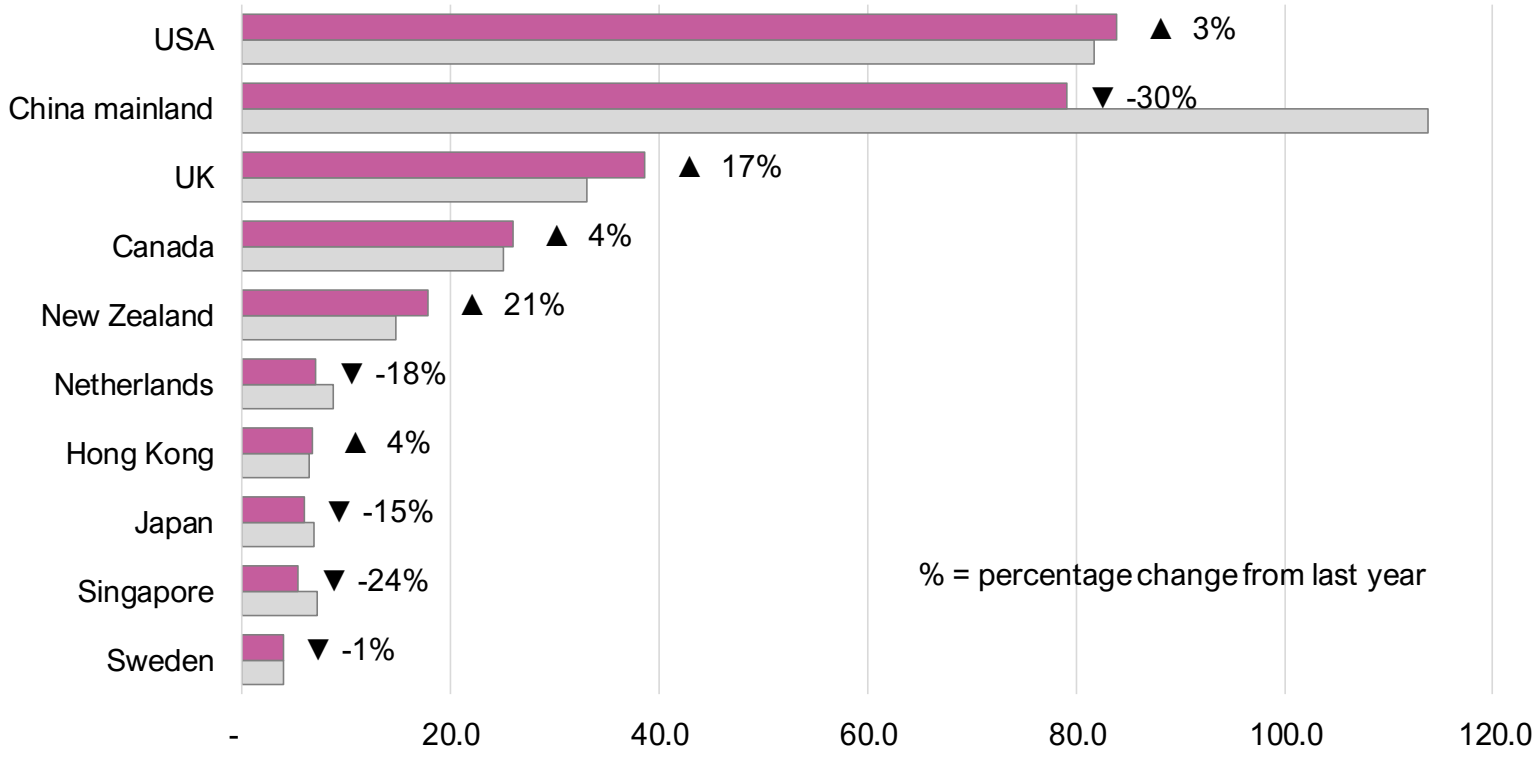
Bottled exports by top 10 destinations – value



	Netherlands	Japan	Malaysia	Singapore	New Zealand	Hong Kong	Canada	UK	USA	China mainland
2020	$29	$33	$43	$79	$86	$130	$155	$171	$359	$961
2019	$33	$38	$35	$105	$71	$102	$148	$143	$351	$1,121

Million AUD

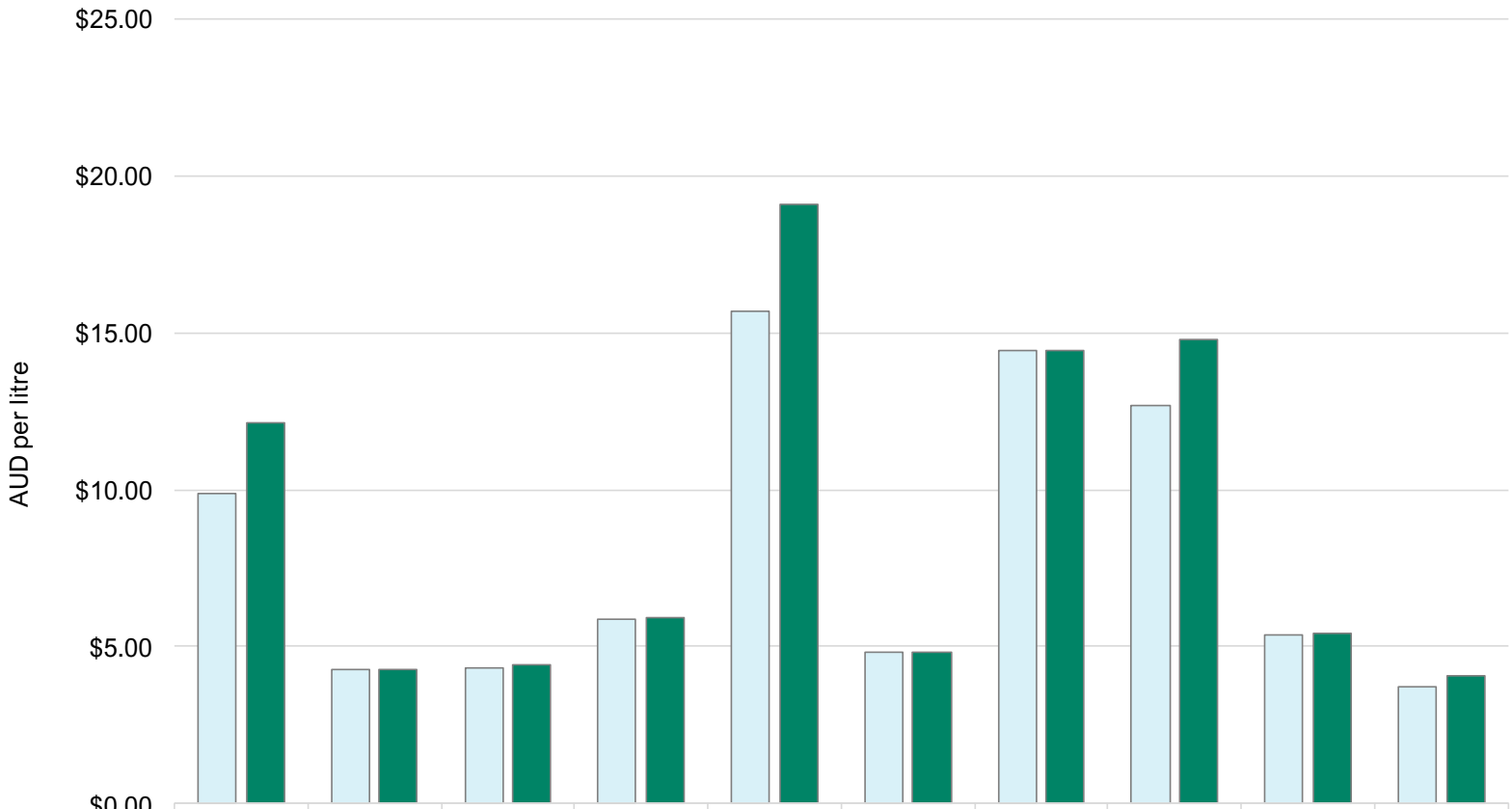
Bottled exports by top 10 destinations – volume



	Sweden	Singapore	Japan	Hong Kong	Netherlands	New Zealand	Canada	UK	China mainland	USA
2020	4.0	5.5	6.0	6.8	7.2	18	26	39	79	84
2019	4.0	7.2	7.0	6.5	8.8	15	25	33	114	82

Million litres

Bottled exports by top 10 destinations – average value

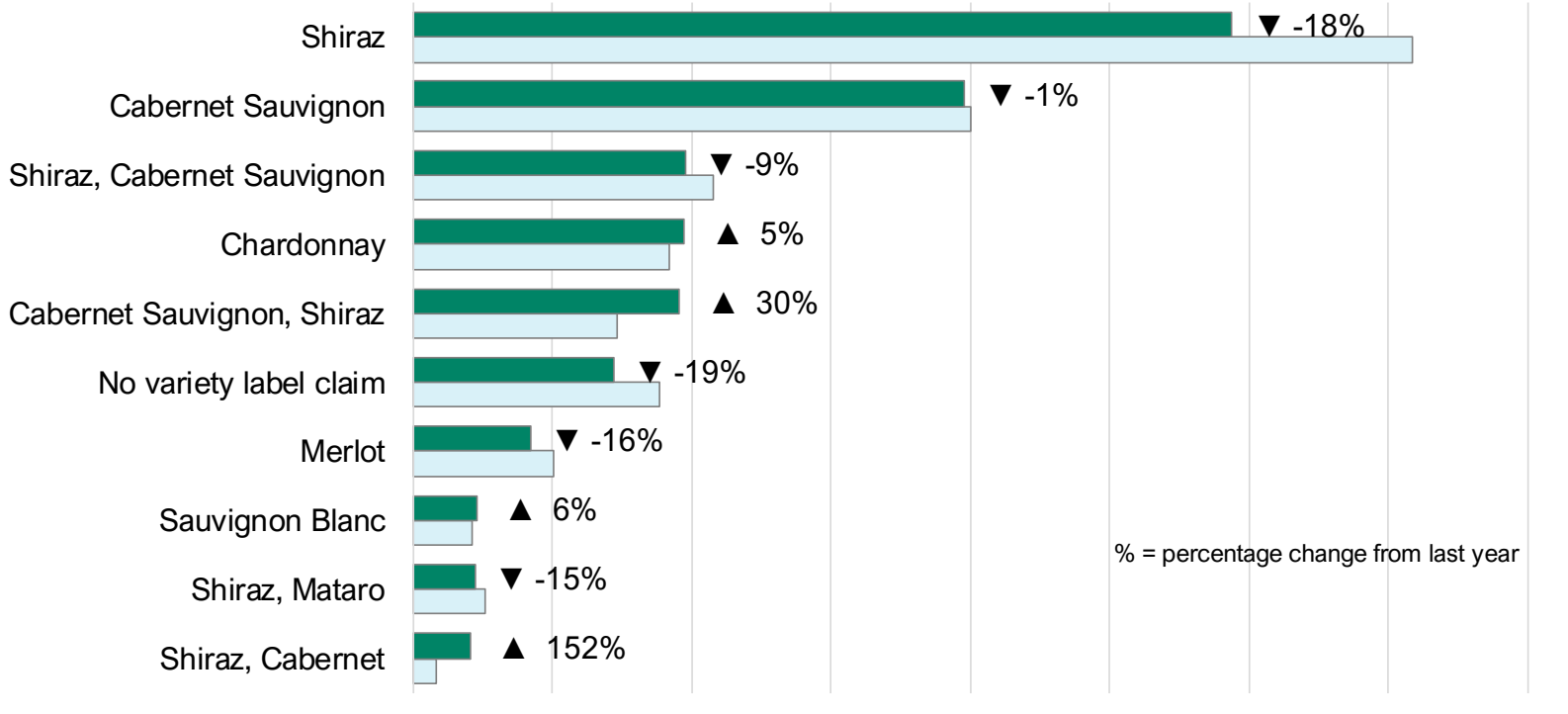


	China mainland	USA	UK	Canada	Hong Kong	New Zealand	Singapore	Malaysia	Japan	Netherlands
2019	$9.86	$4.29	$4.33	$5.86	$15.67	$4.81	$14.43	$12.68	$5.39	$3.74
2020	$12.15	$4.28	$4.41	$5.93	$19.10	$4.80	$14.43	$14.81	$5.44	$4.05
% change	▲ 23%	▼ -0%	▲ 2%	▲ 1%	▲ 22%	▼ -0%	▲ 0%	▲ 17%	▲ 1%	▲ 8%

Bottled exports by top 20 variety label claims

	Value (million AUD)		Volume (million litres)		Average value (AUD per litre)	
Variety label claim	2020	% change	2020	% change	2020	% change
Shiraz	$588	-18%	67.7	-19%	$8.68	1%
Cabernet Sauvignon	$396	-1%	43.5	-12%	$9.09	12%
Shiraz, Cabernet Sauvignon	$195	-9%	24.6	-16%	$7.95	8%
Chardonnay	$194	5%	46.1	4%	$4.21	1%
Cabernet Sauvignon, Shiraz	$191	30%	4.9	-11%	$38.90	47%
No variety label claim	$144	-19%	29.3	-18%	$4.92	-1%
Merlot	$85	-16%	20.2	-11%	$4.19	-5%
Sauvignon Blanc	$46	6%	12.6	8%	$3.62	-2%
Shiraz, Mataro	$45	-15%	2.0	-6%	$21.88	-9%
Shiraz, Cabernet	$41	152%	3.6	91%	$11.60	32%
Pinot Gris	$36	38%	9.4	32%	$3.80	4%
Cabernet, Shiraz	$34	130%	0.8	51%	$43.64	52%
Pinot Noir	$30	-6%	4.4	-6%	$6.67	0%
Moscato	$26	n/a	5.3	n/a	$4.89	-8%
Pinot Grigio	$23	-21%	5.9	-17%	$3.83	-4%
Cabernet Sauvignon, Merlot	$22	-40%	4.6	-38%	$4.78	-2%
Riesling	$18	-5%	2.9	-4%	$6.28	-1%
Shiraz, Grenache, Mataro	$16	-4%	0.7	-9%	$23.23	6%
Cabernet	$14	-2%	0.9	-39%	$15.75	61%
Chardonnay, Pinot Noir	$10	-31%	1.9	-28%	$5.34	-5%

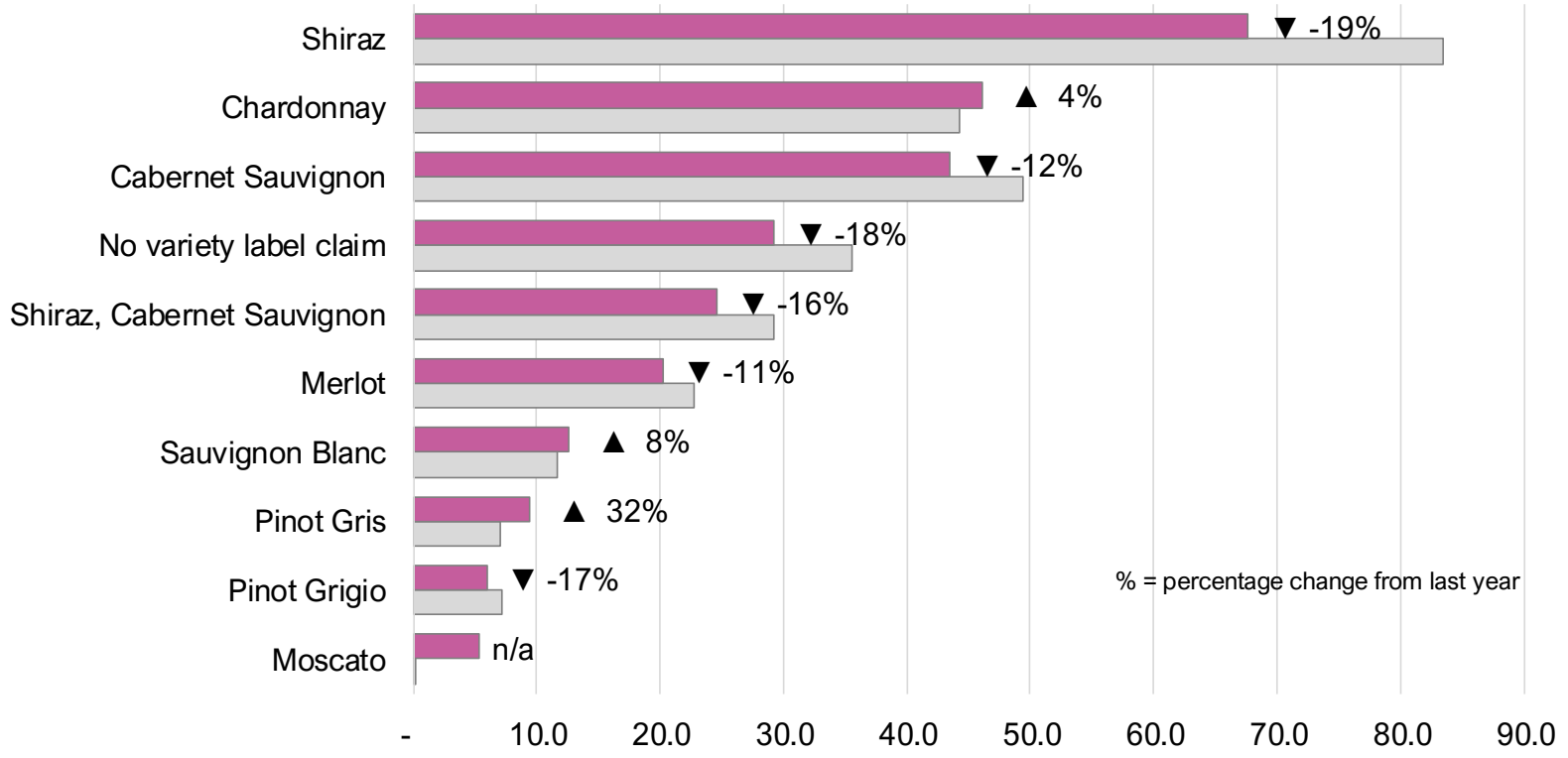
Bottled exports by top 10 variety label claims – value



	Shiraz, Cabernet	Shiraz, Mataro	Sauvignon Blanc	Merlot	No variety label claim	Cabernet Sauvignon, Shiraz	Chardonnay	Shiraz, Cabernet Sauvignon	Cabernet Sauvignon	Shiraz
2020	$41	$45	$46	$85	$144	$191	$194	$195	$396	$588
2019	$16	$52	$43	$101	$177	$146	$184	$216	$400	$717

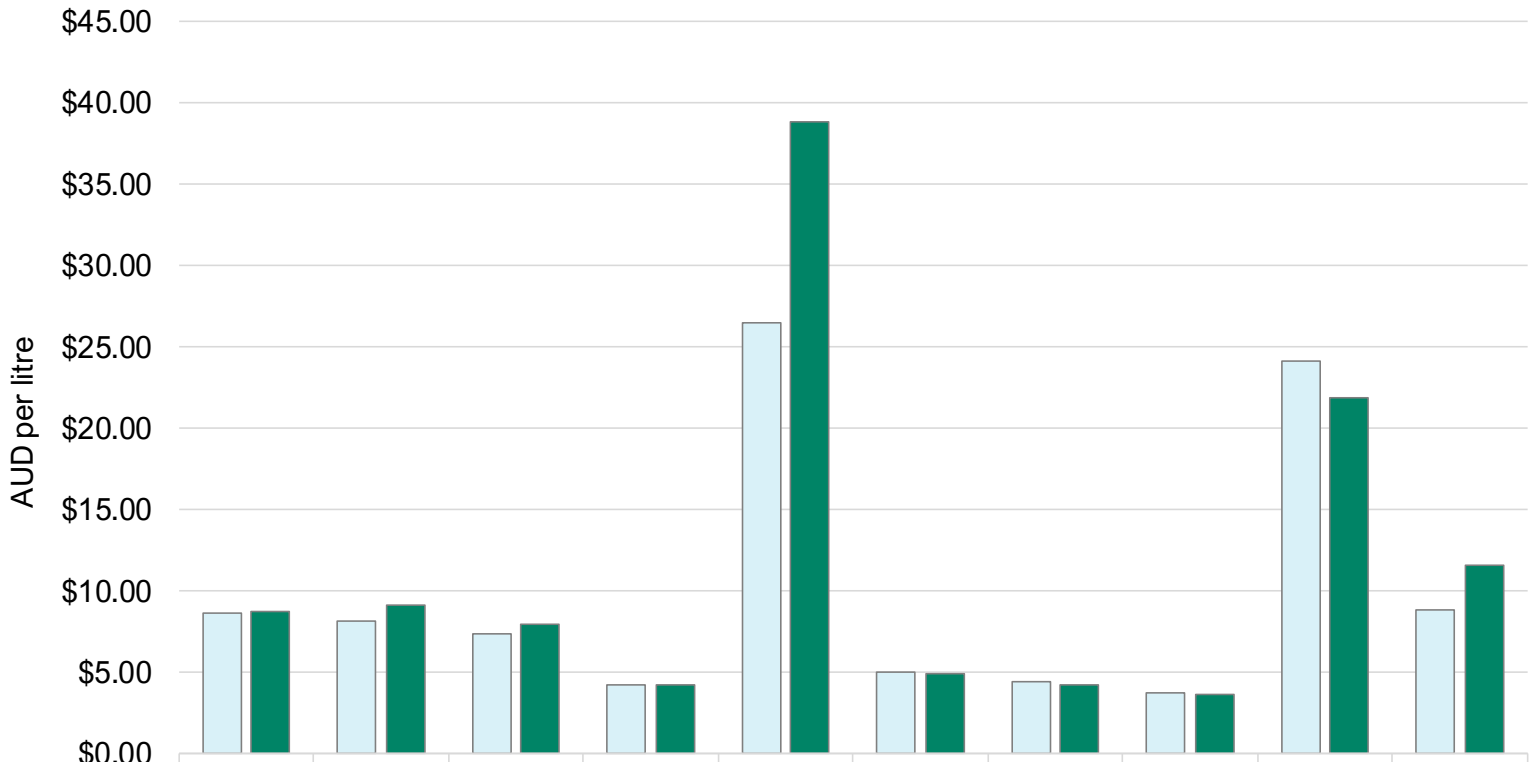
Million AUD

Bottled exports by top 10 variety label claims – volume



	Moscato	Pinot Grigio	Pinot Gris	Sauvignon Blanc	Merlot	Shiraz, Cabernet Sauvignon	No variety label claim	Cabernet Sauvignon	Chardonnay	Shiraz
2020	5.3	5.9	9	13	20	25	29	44	46	68
2019	0.0	7.2	7	12	23	29	36	49	44	83

Bottled exports by top 10 variety label claims – average value

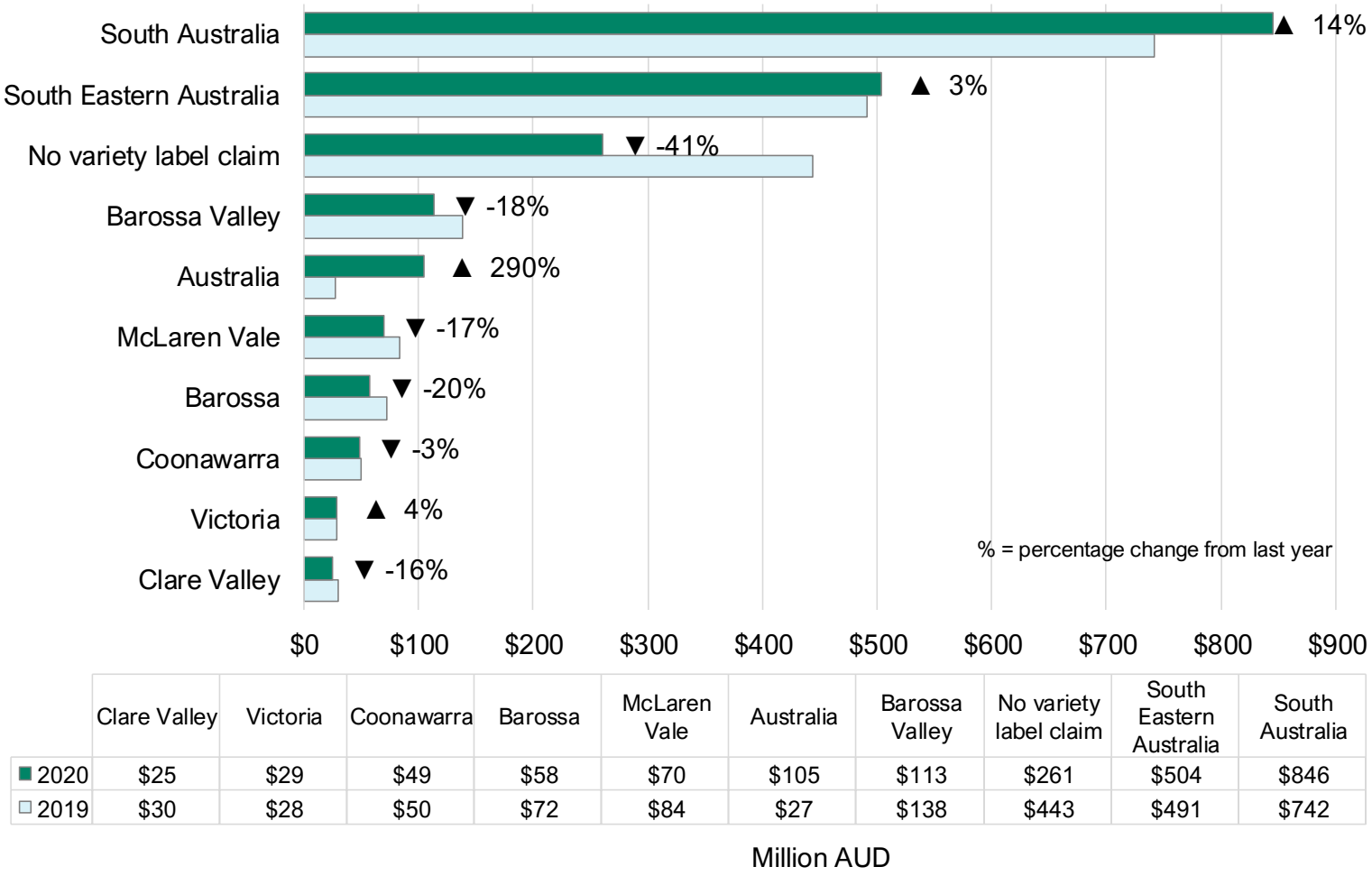


	Shiraz	Cabernet Sauvignon	Shiraz, Cabernet Sauvignon	Chardonnay	Cabernet Sauvignon, Shiraz	No variety label claim	Merlot	Sauvignon Blanc	Shiraz, Mataro	Shiraz, Cabernet
2019	$8.59	$8.09	$7.37	$4.16	$26.44	$4.97	$4.41	$3.69	$24.17	$8.80
2020	$8.68	$9.09	$7.95	$4.21	$38.90	$4.92	$4.19	$3.62	$21.88	$11.60
% change	▲ 1%	▲ 12%	▲ 8%	▲ 1%	▲ 47%	▼ -1%	▼ -5%	▼ -2%	▼ -9%	▲ 32%

Bottled exports by top 20 GI label claims

	Value (million AUD)		Volume (million litres)		Average value (AUD per litre)	
GI label claim	2020	% change	2020	% change	2020	% change
South Australia	$846	14%	65.0	-5%	$13.00	20%
South Eastern Australia	$504	3%	131.6	2%	$3.83	1%
No variety label claim	$261	-41%	49.1	-38%	$5.32	-5%
Barossa Valley	$113	-18%	5.4	-13%	$20.90	-6%
Australia	$105	290%	16.9	247%	$6.21	12%
McLaren Vale	$70	-17%	5.7	-22%	$12.30	7%
Barossa	$58	-20%	4.6	-17%	$12.63	-4%
Coonawarra	$49	-3%	2.9	-11%	$16.58	10%
Victoria	$29	4%	4.9	12%	$5.94	-8%
Clare Valley	$25	-16%	2.7	-18%	$9.44	2%
Margaret River	$24	-28%	1.8	-33%	$13.04	7%
Yarra Valley	$19	-23%	1.0	-24%	$18.53	1%
Limestone Coast	$17	-12%	2.6	-10%	$6.67	-3%
Adelaide Hills	$13	-34%	1.0	-44%	$12.61	17%
Langhorne Creek	$12	-37%	1.5	-38%	$8.23	0%
Heathcote	$12	-14%	0.7	-17%	$16.42	4%
Eden Valley	$9	8%	0.4	-9%	$21.32	19%
Tasmania	$6	15%	0.3	-1%	$17.66	16%
Padthaway	$5	0%	0.8	8%	$6.29	-7%
Riverina	$5	-3%	0.9	-12%	$5.41	9%

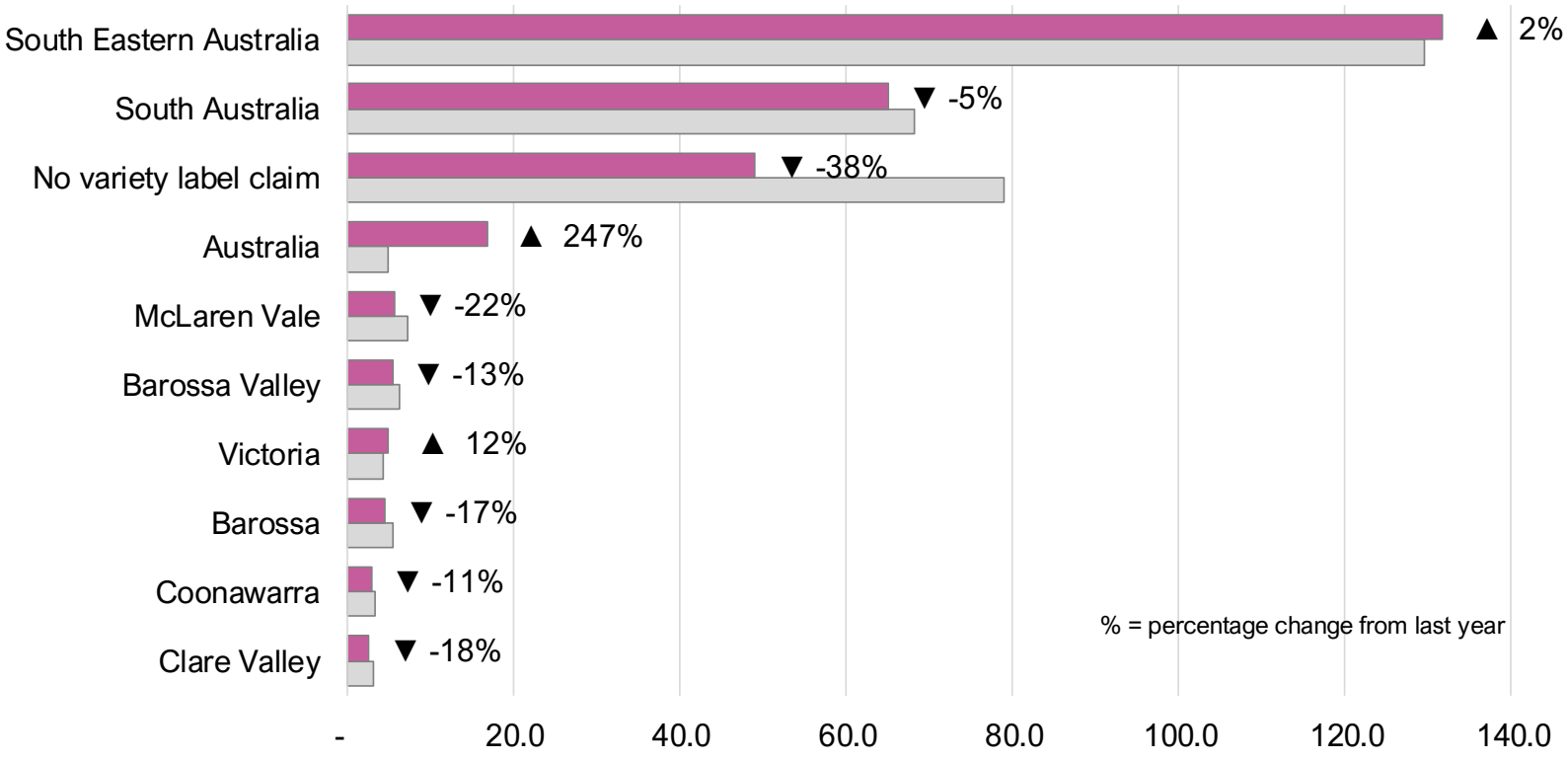
Bottled exports by top 10 GI label claims – value



	Clare Valley	Victoria	Coonawarra	Barossa	McLaren Vale	Australia	Barossa Valley	No variety label claim	South Eastern Australia	South Australia
2020	$25	$29	$49	$58	$70	$105	$113	$261	$504	$846
2019	$30	$28	$50	$72	$84	$27	$138	$443	$491	$742

Million AUD

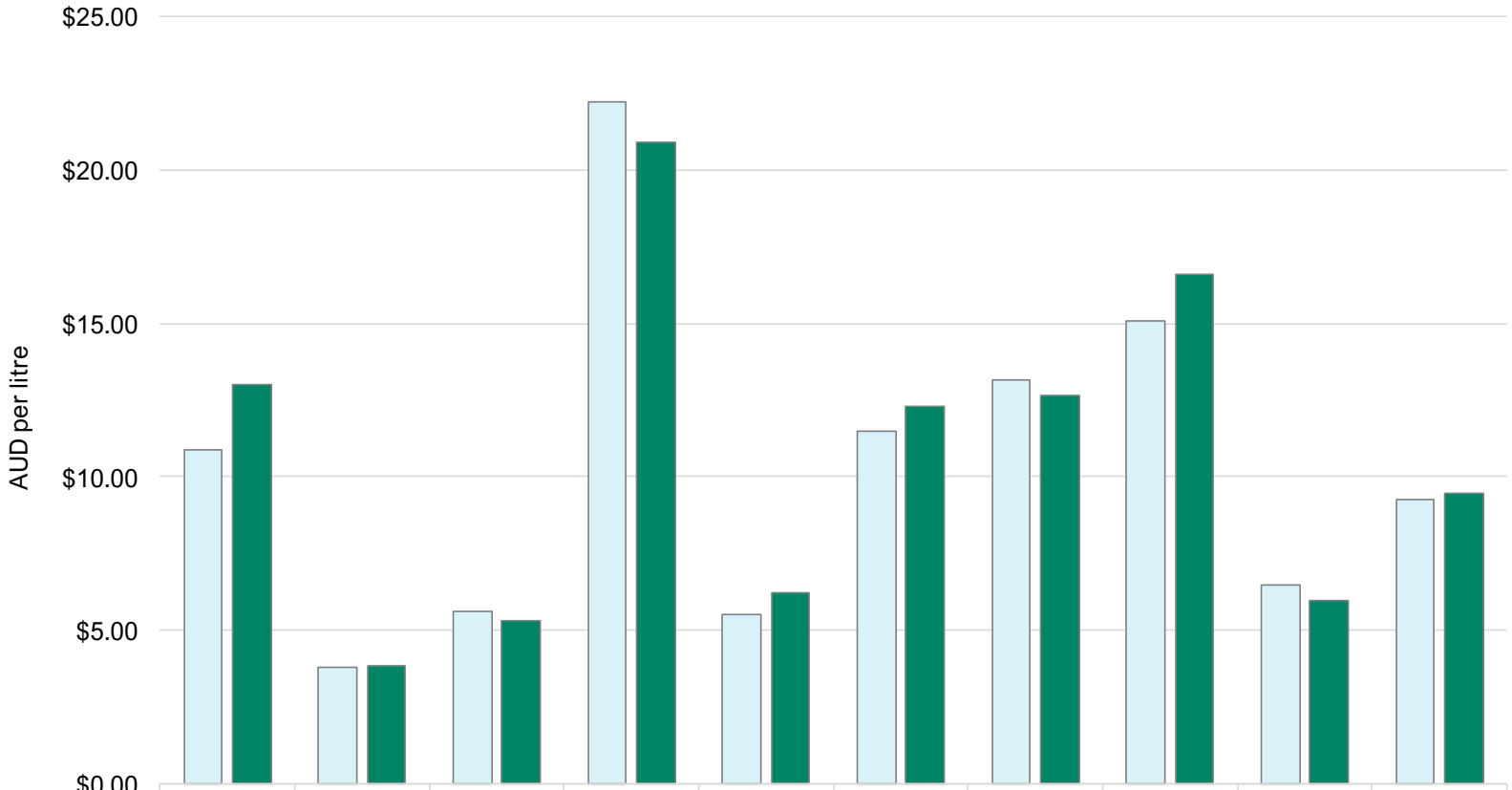
Bottled exports by top 10 GI label claims – volume



	Clare Valley	Coonawarra	Barossa	Victoria	Barossa Valley	McLaren Vale	Australia	No variety label claim	South Australia	South Eastern Australia
2020	2.7	2.9	4.6	4.9	5.4	5.7	16.9	49	65	132
2019	3.2	3.3	5.5	4.4	6.2	7.3	4.9	79	68	129

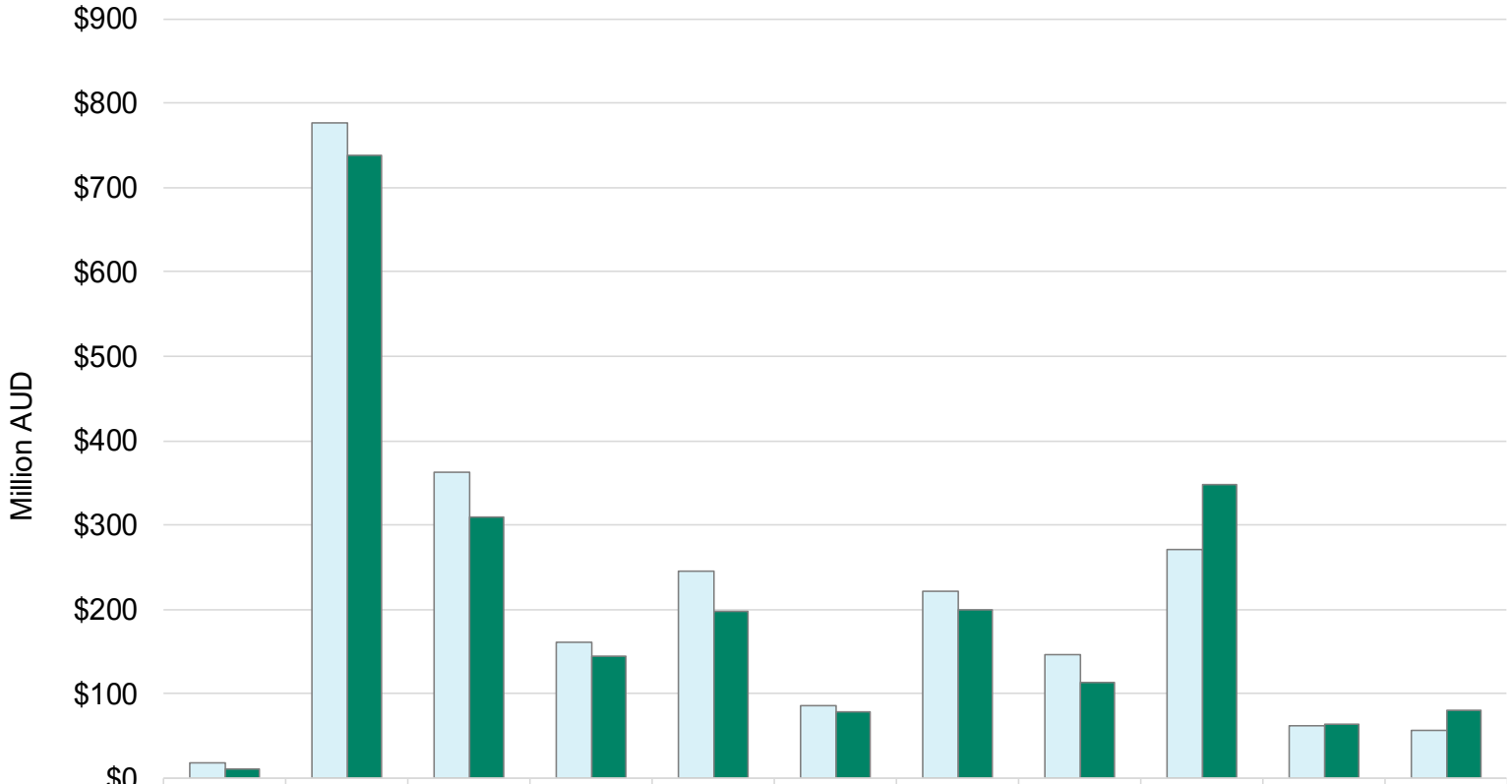
Million litres

Bottled exports by top 10 GI label claims – average value



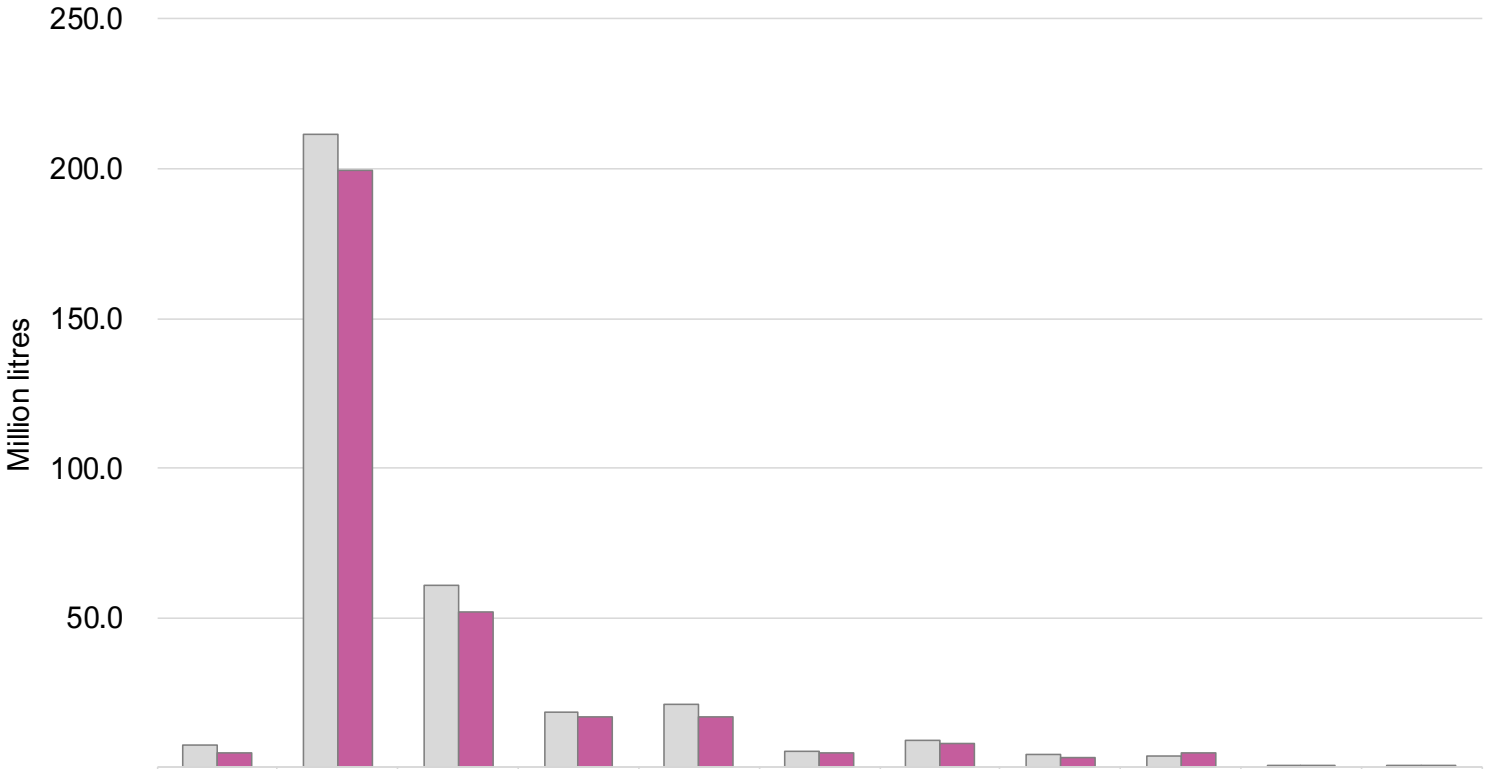
	South Australia	South Eastern Australia	No variety label claim	Barossa Valley	Australia	McLaren Vale	Barossa	Coonawarra	Victoria	Clare Valley
2019	$10.88	$3.79	$5.62	$22.20	$5.52	$11.49	$13.13	$15.10	$6.46	$9.26
2020	$13.00	$3.83	$5.32	$20.90	$6.21	$12.30	$12.63	$16.58	$5.94	$9.44
% change	▲ 20%	▲ 1%	▼ -5%	▼ -6%	▲ 12%	▲ 7%	▼ -4%	▲ 10%	▼ -8%	▲ 2%

Bottled exports by price segment – value



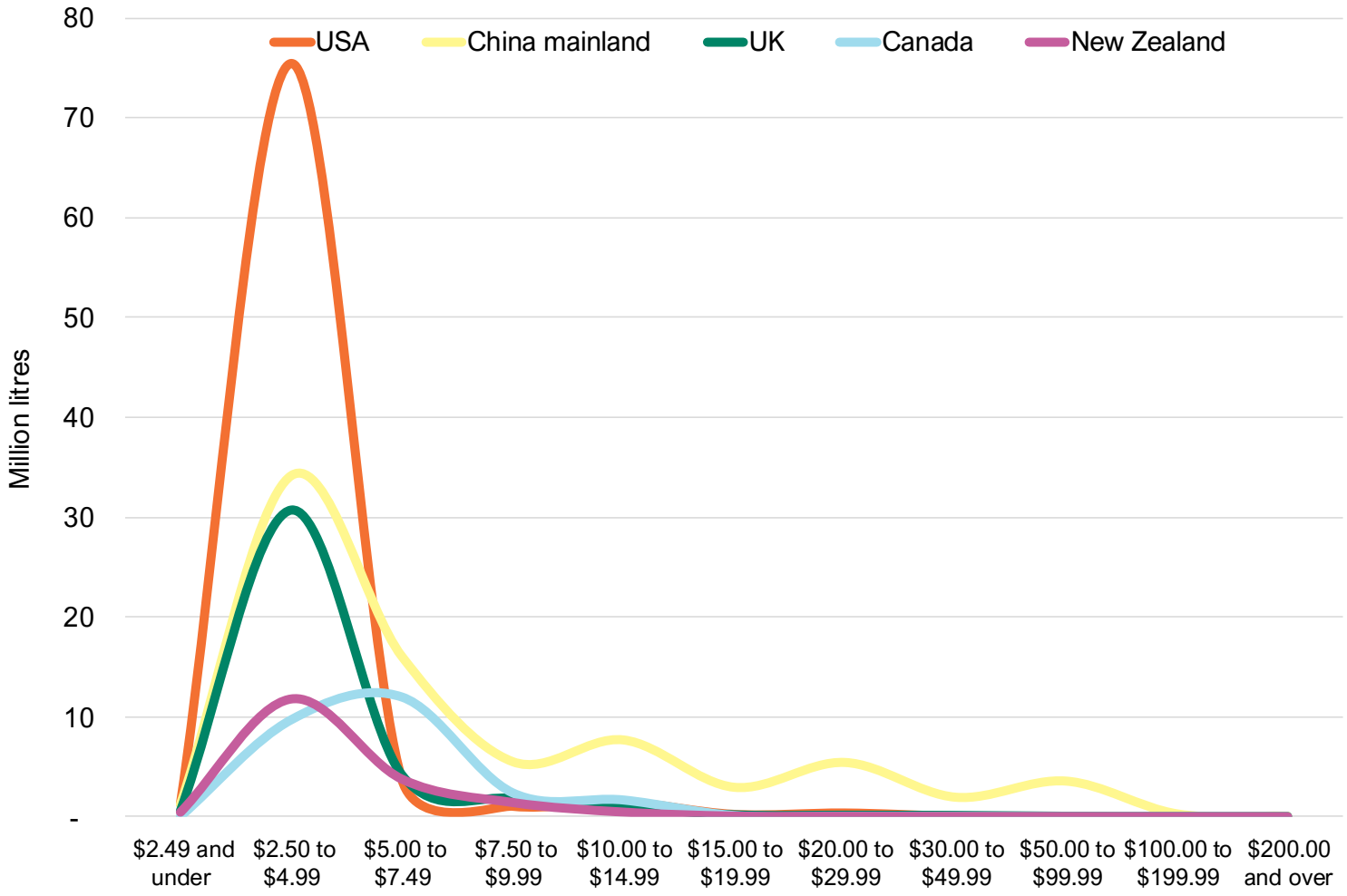
	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10.00 to $14.99	$15.00 to $19.99	$20.00 to $29.99	$30.00 to $49.99	$50.00 to $99.99	$100.00 to $199.99	$200.00 and over
2019	$17	$777	$362	$161	$245	$86	$222	$146	$271	$61	$57
2020	$11	$737	$309	$145	$197	$79	$199	$114	$347	$63	$80
% change	▼ -37%	▼ -5%	▼ -14%	▼ -10%	▼ -20%	▼ -7%	▼ -10%	▼ -22%	▲ 28%	▲ 3%	▲ 40%

Bottled exports by price segment – volume



	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10.00 to $14.99	$15.00 to $19.99	$20.00 to $29.99	$30.00 to $49.99	$50.00 to $99.99	$100.00 to $199.99	$200.00 and over
2019	7.4	211.7	60.9	18.5	20.8	5.1	9.0	4.1	3.7	0.5	0.1
2020	5.0	199.4	51.7	16.6	16.8	4.6	8.1	3.1	4.9	0.5	0.1
% change	▼ -33%	▼ -6%	▼ -15%	▼ -10%	▼ -19%	▼ -10%	▼ -10%	▼ -23%	▲ 33%	▲ 2%	▲ 47%

Bottled exports price segment profile – top markets



Unpackaged wine exports

Unpackaged exports by price segment and destination	42
Unpackaged exports by wine style	44
Unpackaged exports by top destinations	47
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Unpackaged exports by price segment	52

Unpackaged exports by price segment and destination – value (‘000 AUD)

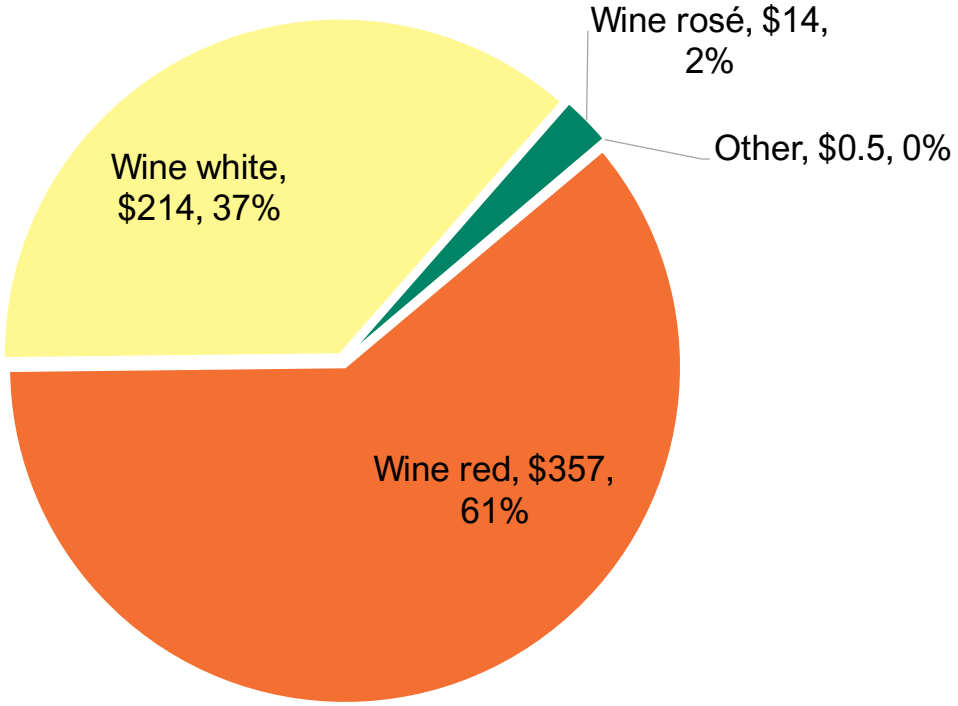
	$0.49 and under		$0.50 to $0.99		$1.00 to $1.49		$1.50 to $1.99		$2.00 to $2.49		$2.50 and above		Total	
Destination market	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change
UK	$26	▼ -61%	$62,046	▼ -17%	$143,658	▲ 35%	$61,687	▲ 314%	$3,921	▲ 81%	$13,777	▲ 32%	$285,115	▲ 36%
USA	$82	▼ -31%	$172	▼ -98%	$42,345	▲ 3%	$22,981	▲ 48%	$4,101	▲ 267%	$5,666	▲ 175%	$75,346	▲ 10%
China mainland	$0	na	$75	na	$5,884	▼ -45%	$6,053	▼ -30%	$3,223	▲ 88%	$36,808	▲ 24%	$52,042	▲ 2%
Germany	$0	na	$7,294	▼ -13%	$23,375	▲ 14%	$7,021	▲ 72%	$384	▼ -71%	$4,705	▲ 150%	$42,778	▲ 18%
Canada	$0	na	$4,499	▼ -28%	$24,896	▲ 1%	$5,828	▲ 69%	$573	▲ 4%	$112	na	$35,907	▲ 3%
Denmark	$42	na	$1,150	▼ -49%	$10,837	▲ 15%	$11,869	▲ 136%	$111	▼ -35%	$250	▲ 29%	$24,261	▲ 42%
New Zealand	$0	▼ -100%	$3,427	▼ -29%	$9,527	▲ 29%	$2,394	▲ 92%	$404	▲ 51%	$3,328	▼ -40%	$19,080	▼ -1%
France	$0	na	$593	▲ 5%	$5,780	▲ 117%	$4,846	▼ -4%	$687	▲ 138%	$236	▼ -63%	$12,141	▲ 32%
Belgium	$0	na	$676	▼ -69%	$5,960	▲ 18%	$2,373	▲ 62%	$59	▼ -75%	$201	▲ 23877%	$9,270	▲ 4%
Netherlands	$0	na	$55	▼ -97%	$5,612	▼ -21%	$2,185	▲ 65%	$0	▼ -100%	$0	na	$7,852	▼ -23%
Japan	$0	na	$0	▼ -100%	$4,184	▼ -27%	$1,007	▼ -35%	$345	▲ 85%	$84	▼ -80%	$5,620	▼ -37%
Finland	$0	na	$44	▼ -2%	$2,882	▲ 1%	$2,393	▲ 16%	$48	▼ -86%	$0	▼ -100%	$5,367	▼ -12%
Sweden	$0	na	$0	na	$764	▲ 143%	$1,459	▲ 109%	$554	▲ 59%	$1,107	▲ 1%	$3,885	▲ 58%
Norway	$0	na	$0	na	$103	▼ -90%	$1,615	▲ 996%	$55	na	$0	na	$1,773	▲ 57%
Switzerland	$0	na	$85	▲ 29%	$550	▼ -10%	$294	▼ -0%	$0	na	$511	▲ 50%	$1,440	▲ 10%
Ireland	$0	na	$0	na	$297	▼ -20%	$375	▲ 205%	$120	na	$313	▲ 141%	$1,105	▲ 77%
Poland	$0	na	$0	na	$36	▼ -41%	$539	▼ -4%	$0	▼ -100%	$67	▼ -75%	$642	▼ -31%
Thailand	$0	na	$0	▼ -100%	$406	▼ -29%	$226	▼ -2%	$0	na	$0	na	$632	▼ -25%
Spain	$0	na	$0	▼ -100%	$176	▲ 44%	$347	▲ 105%	$107	▲ 7%	$0	▼ -100%	$630	▼ -10%
Italy	$0	na	$0	▼ -100%	$0	na	$173	▲ 41%	$0	na	$0	na	$173	▼ -48%
Rest of world	$0	na	$0	na	$167	▲ 68%	$36	▼ -56%	$103	▲ 115%	$71	▲ 66%	$377	▲ 39%
Total	$150	▼ -20%	$80,115	▼ -28%	$287,440	▲ 16%	$135,701	▲ 103%	$14,793	▲ 65%	$67,236	▲ 25%	$585,436	▲ 20%

Unpackaged exports by price segment and destination – volume ('000 L)

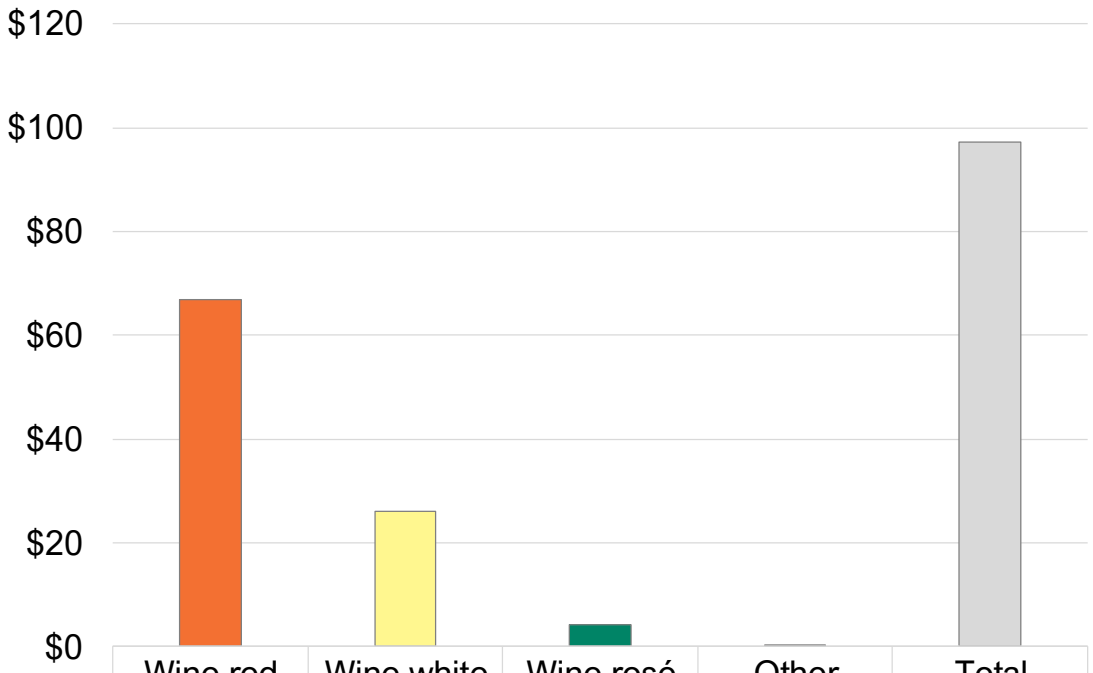
	$0.49 and under		$0.50 to $0.99		$1.00 to $1.49		$1.50 to $1.99		$2.00 to $2.49		$2.50 and above		Total	
Destination market	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change	2020	% change
UK	264	▼ -26%	71,272	▼ -21%	113,561	▲ 30%	36,999	▲ 299%	1,768	▲ 75%	3,822	▲ 33%	227,687	▲ 19%
USA	504	▲ 91%	191	▼ -98%	34,677	▼ -1%	13,133	▲ 38%	1,826	▲ 263%	1,240	▲ 138%	51,571	▼ -7%
Germany	-	na	7,824	▼ -13%	18,937	▲ 15%	4,536	▲ 73%	192	▼ -71%	1,296	▲ 135%	32,785	▲ 12%
Canada	-	na	5,046	▼ -29%	20,168	▼ -2%	3,683	▲ 73%	277	▲ 3%	24	na	29,197	▼ -3%
China mainland	-	na	96	na	4,575	▼ -46%	3,552	▼ -31%	1,488	▲ 94%	7,454	▲ 14%	17,164	▼ -18%
Denmark	240	na	1,223	▼ -51%	8,534	▲ 17%	6,971	▲ 133%	48	▼ -33%	50	▼ -32%	17,066	▲ 32%
New Zealand	-	▼ -100%	4,542	▼ -32%	7,663	▲ 26%	1,532	▲ 94%	195	▲ 63%	588	▼ -40%	14,519	▼ -1%
France	-	na	624	▲ 8%	4,913	▲ 102%	3,119	▼ -4%	336	▲ 134%	72	▼ -65%	9,064	▲ 37%
Belgium	-	na	807	▼ -69%	5,234	▲ 20%	1,451	▲ 60%	24	▼ -75%	72	▲ 30052%	7,590	▼ -5%
Netherlands	-	na	72	▼ -96%	4,877	▼ -18%	1,392	▲ 60%	-	▼ -100%	-	na	6,341	▼ -28%
Japan	-	na	-	▼ -100%	3,782	▼ -26%	625	▼ -34%	168	▲ 88%	24	▼ -80%	4,600	▼ -38%
Finland	-	na	51	▼ -2%	2,568	▲ 4%	1,561	▲ 18%	24	▼ -84%	-	▼ -100%	4,204	▲ 1%
Sweden	-	na	-	na	673	▲ 136%	877	▲ 124%	264	▲ 57%	429	▲ 5%	2,243	▲ 79%
Norway	-	na	-	na	72	▼ -89%	1,056	▲ 1000%	24	na	-	na	1,152	▲ 50%
Switzerland	-	na	96	▲ 33%	472	▼ -6%	192	▼ -0%	-	na	95	▲ 34%	855	▲ 2%
Ireland	-	na	-	na	234	▼ -18%	233	▲ 200%	53	na	104	▲ 100%	623	▲ 50%
Thailand	-	na	-	▼ -100%	311	▼ -32%	144	▲ 0%	-	na	-	na	455	▼ -30%
Spain	-	na	-	▼ -100%	144	▲ 47%	216	▲ 116%	52	▲ 4%	-	▼ -100%	412	▼ -1%
Poland	-	na	-	na	32	▼ -33%	304	▼ -10%	-	▼ -100%	24	▼ -75%	360	▼ -28%
Cameroon	-	na	-	na	119	na	-	na	-	na	-	na	119	na
Rest of world	-	na	-	▼ -100%	-	▼ -100%	120	▼ -0%	48	▲ 100%	14	▲ 193%	182	▼ -64%
Total	1,009	▲ 56%	91,844	▼ -30%	231,545	▲ 14%	81,696	▲ 98%	6,786	▲ 62%	15,309	▲ 20%	428,189	▲ 9%

Unpackaged exports by wine style - value

Value (million AUD)



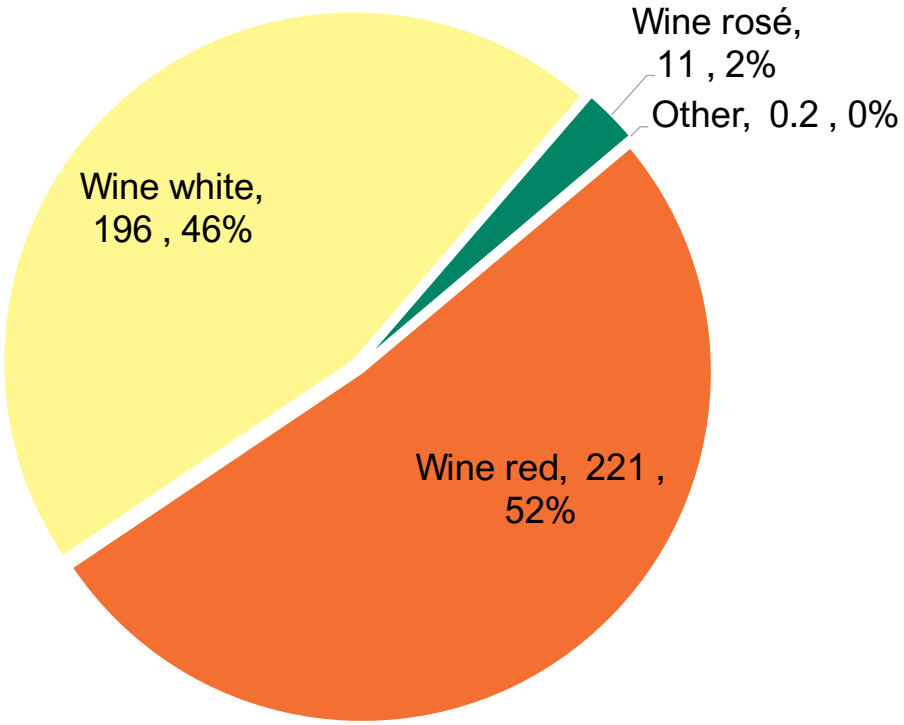
Value change (million AUD)



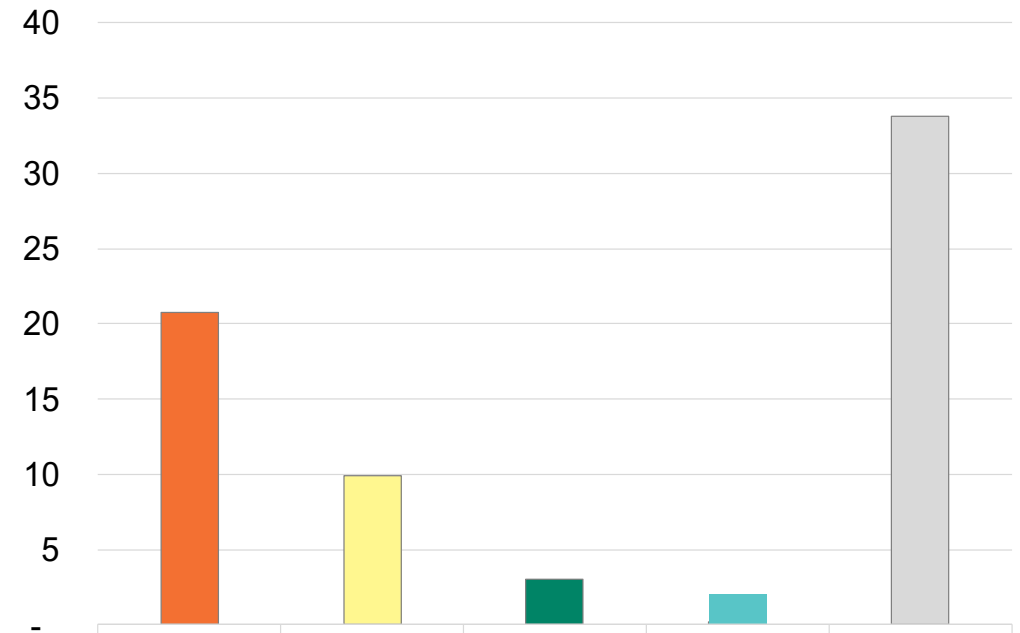
	Wine red	Wine white	Wine rosé	Other	Total
Value change	$67	$26	$4.2	$0.2	$97
% change	▲ 23%	▲ 14%	▲ 44%	▲ 89%	▲ 20%

Unpackaged exports by wine style - volume

Volume (million litres)



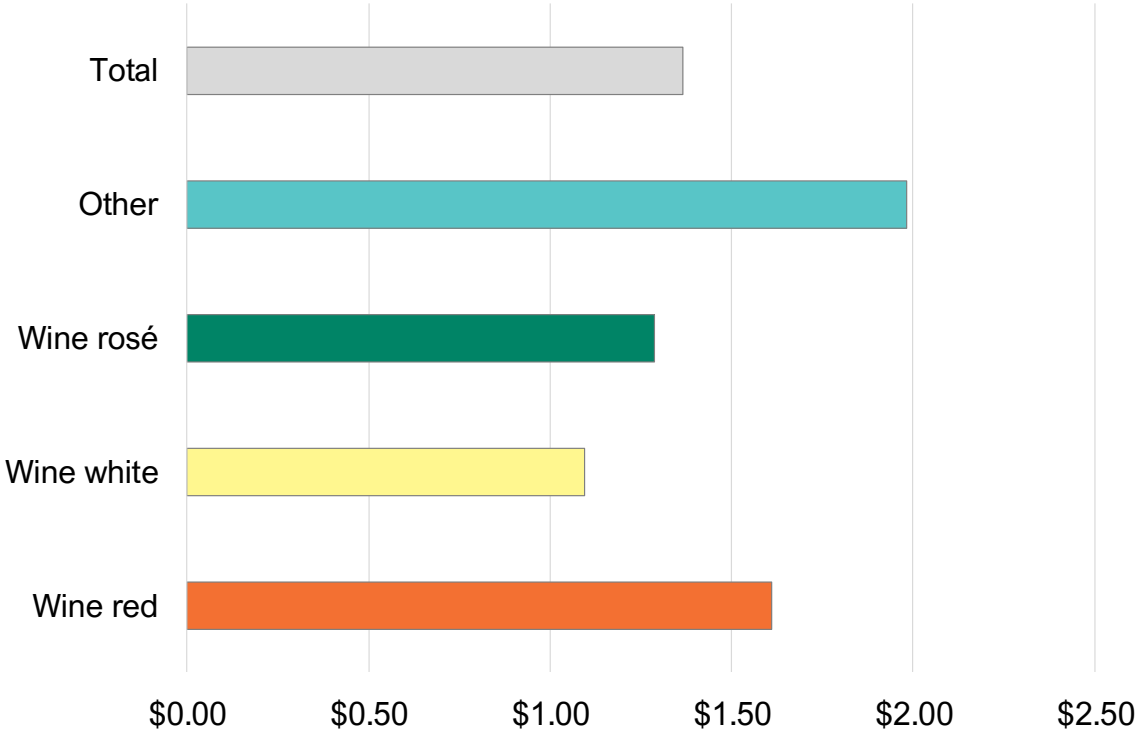
Volume change (million litres)



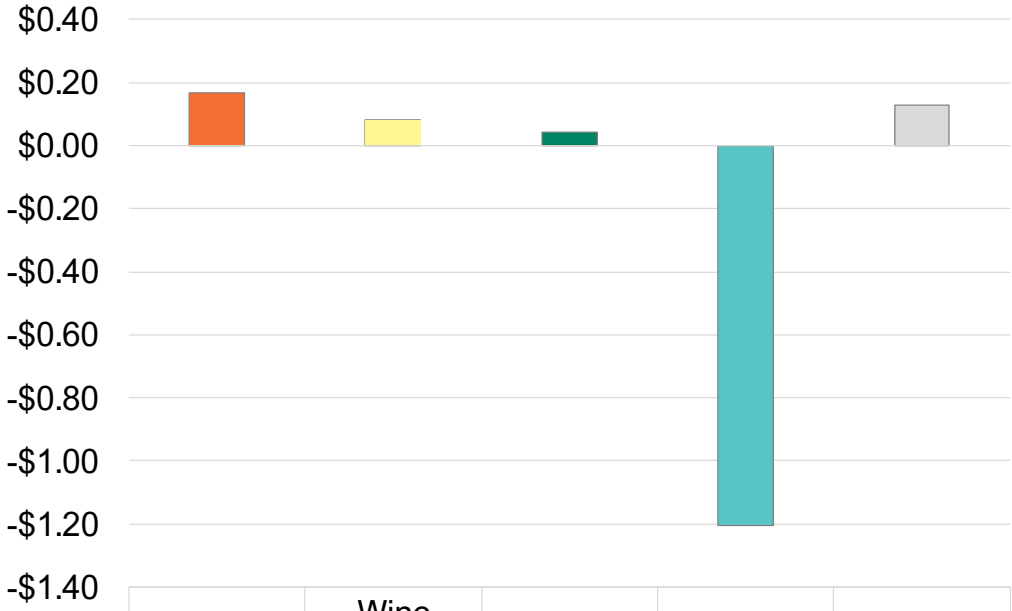
	Wine red	Wine white	Wine rosé	Other	Total
Volume change	21	10	3.0	0.2	34
% change	▲ 10%	▲ 5%	▲ 39%	▲ 204%	▲ 9%

Unpackaged exports by wine style – average value

Average value (AUD per litre)

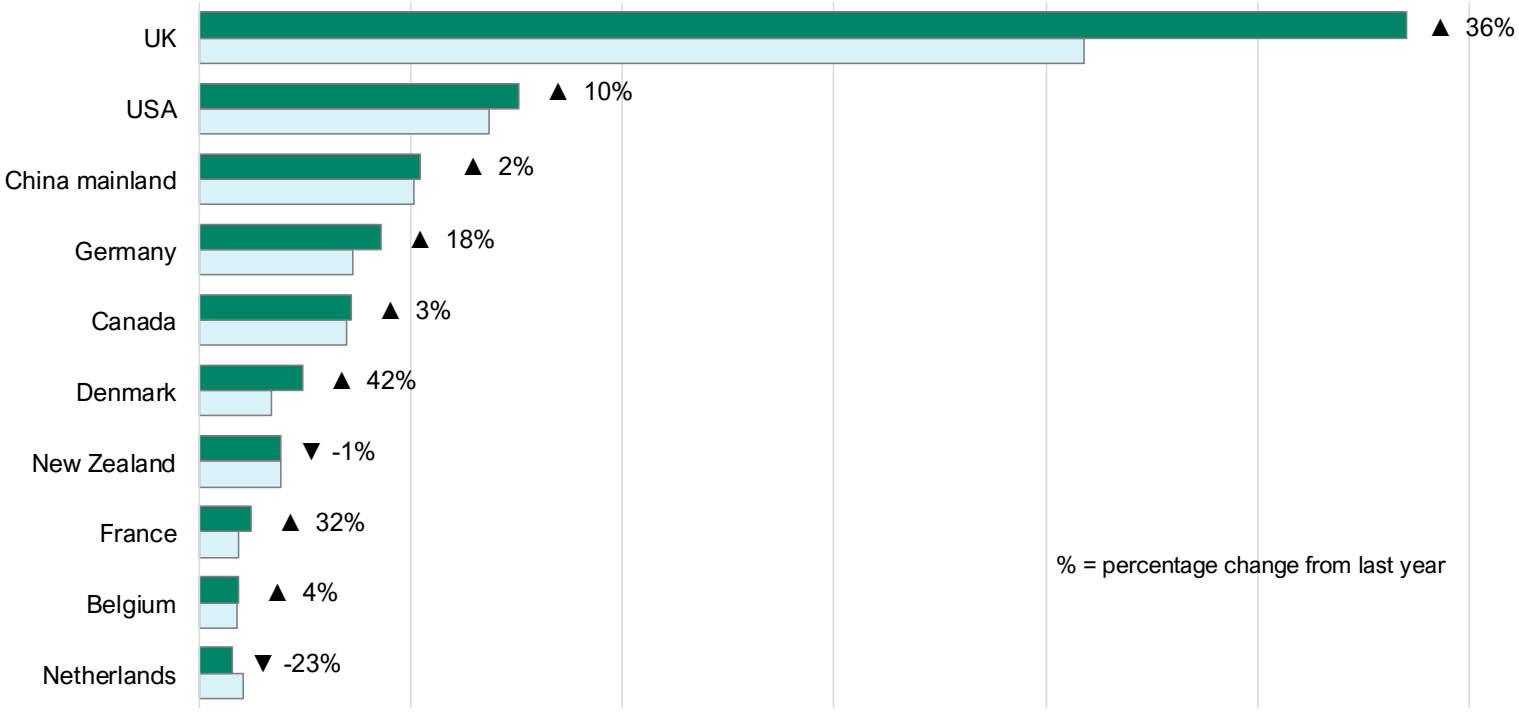


Average value change (AUD per litre)



	Wine red	Wine white	Wine rosé	Other	Total
Ave. value change	$0.17	$0.08	$0.04	-$1.20	$0.13
% change	▲ 12%	▲ 8%	▲ 3%	▼ -38%	▲ 10%

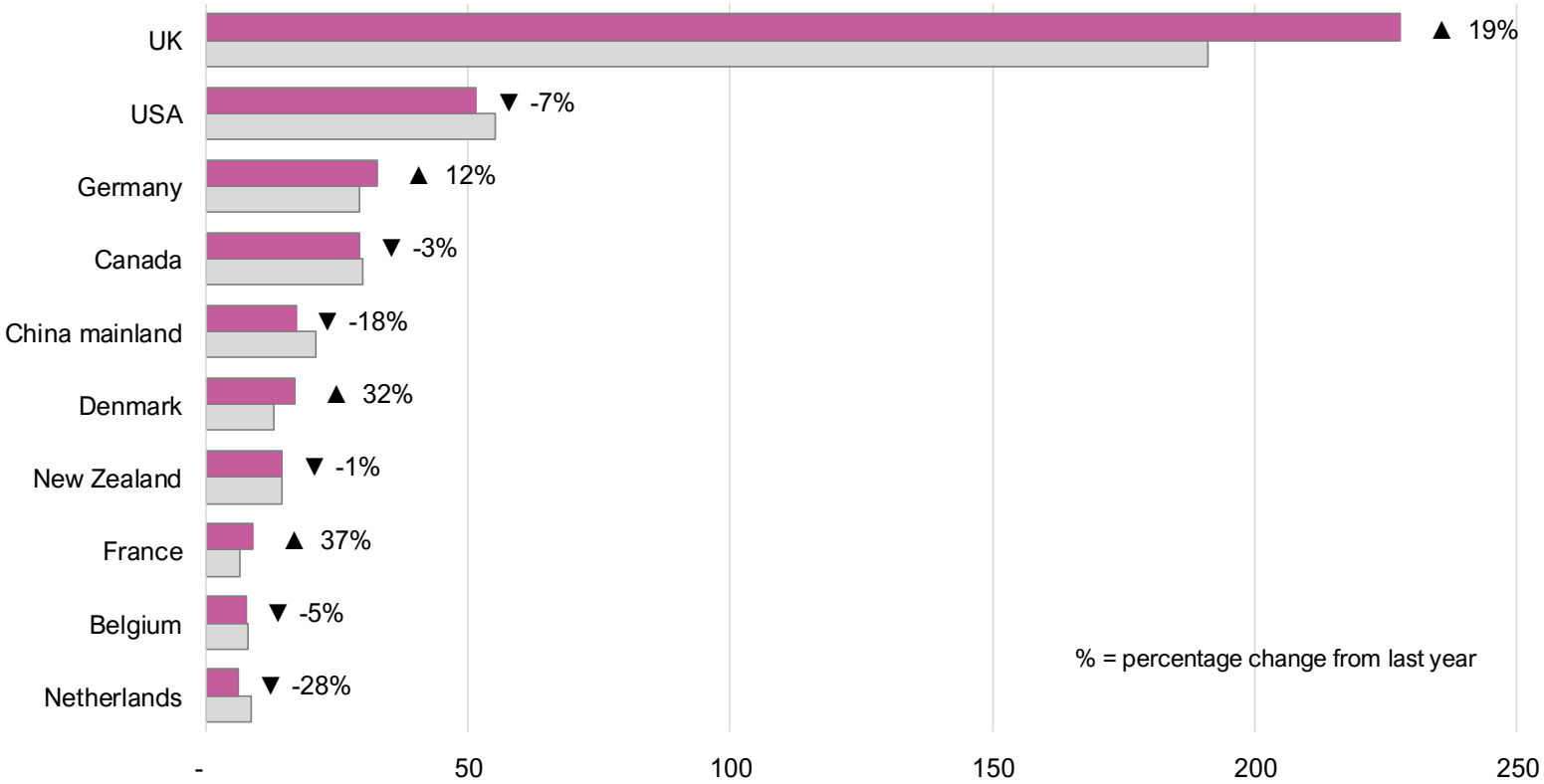
Unpackaged exports by top 10 destinations – value



	Netherlands	Belgium	France	New Zealand	Denmark	Canada	Germany	China mainland	USA	UK
2020	$8	$9	$12	$19	$24	$36	$43	$52	$75	$285
2019	$10	$9	$9	$19	$17	$35	$36	$51	$69	$209

Million AUD

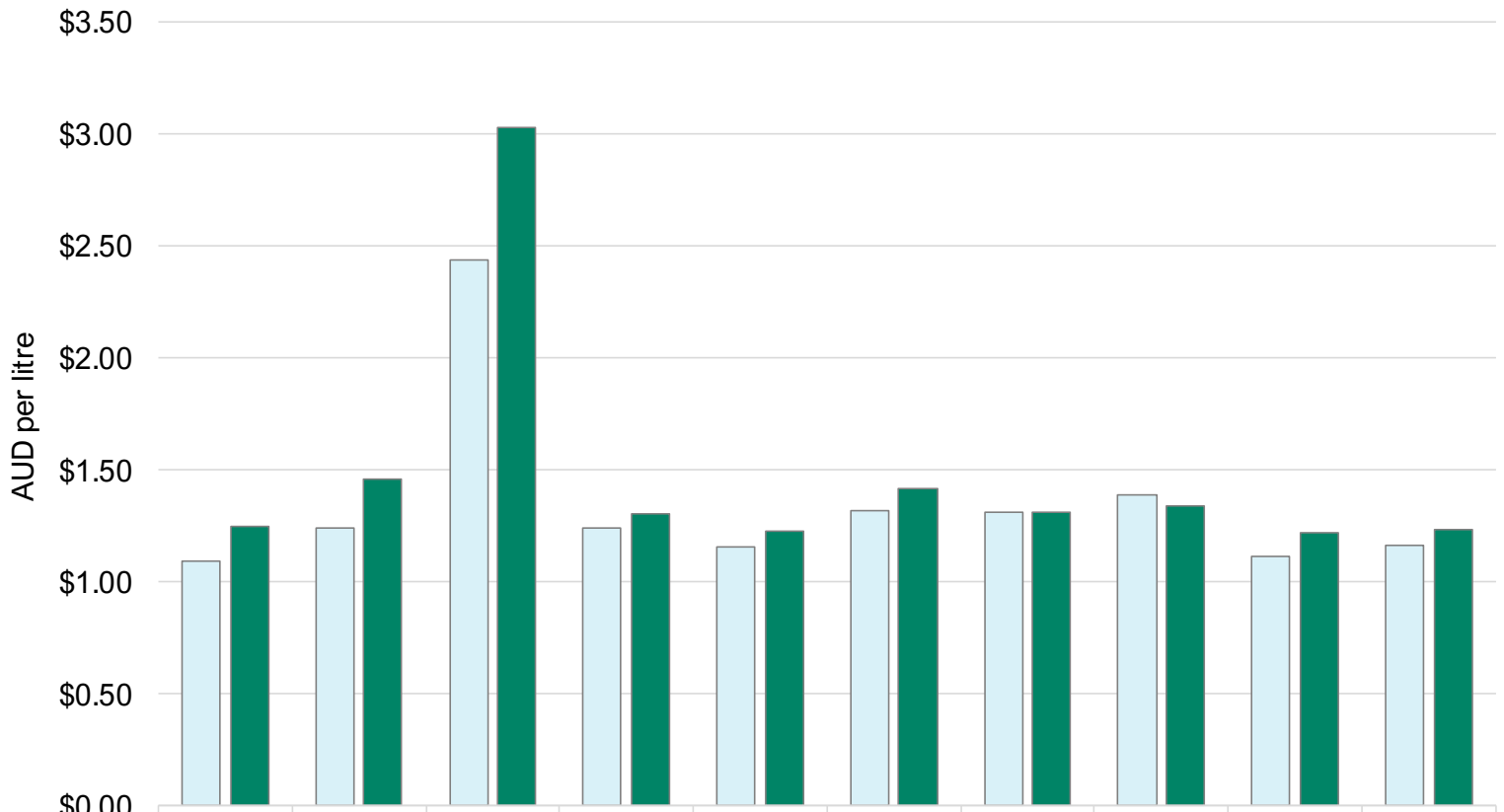
Unpackaged exports by top 10 destinations – volume



	Netherlands	Belgium	France	New Zealand	Denmark	China mainland	Canada	Germany	USA	UK
2020	6	8	9	15	17	17	29	33	52	228
2019	9	8	7	15	13	21	30	29	55	191

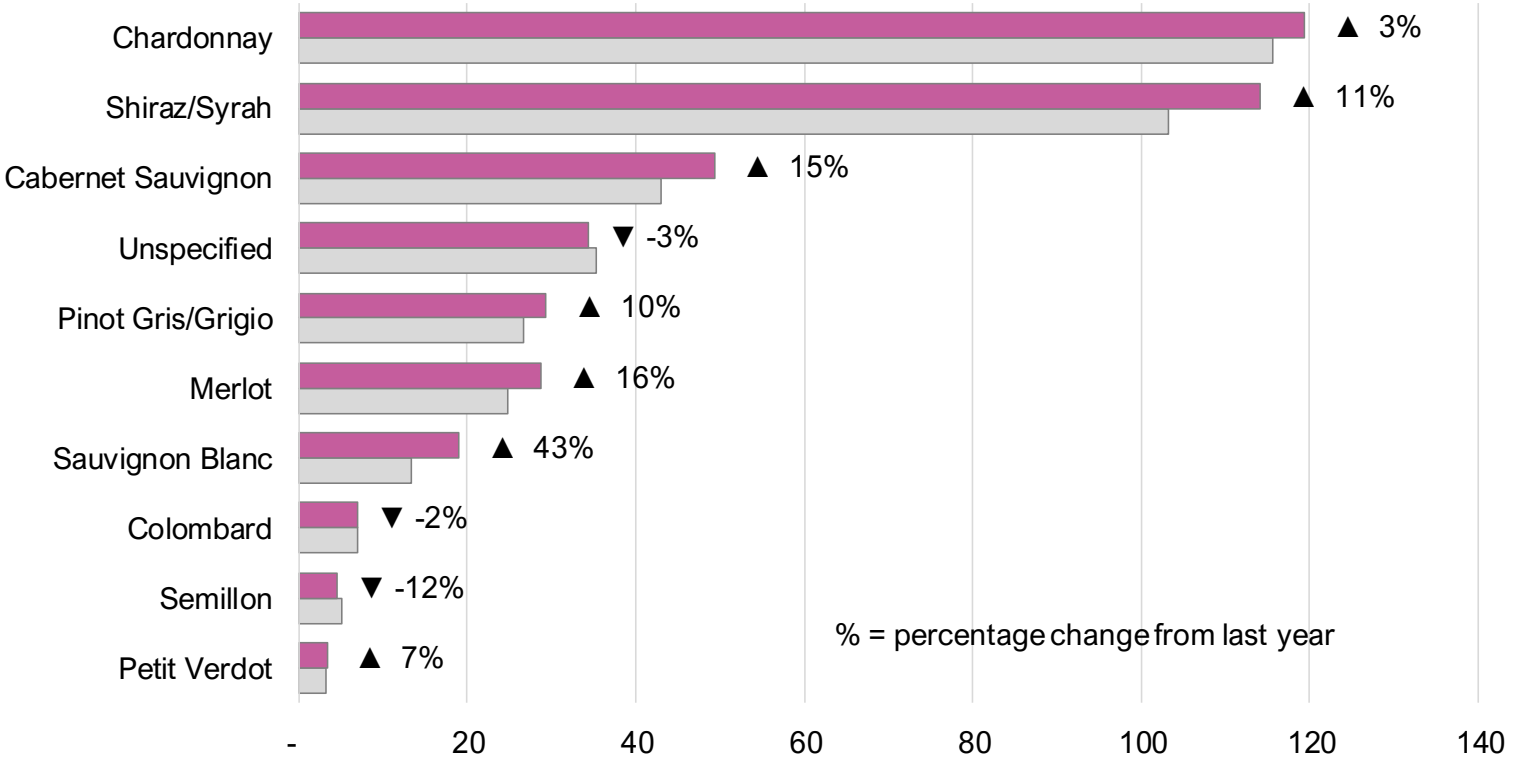
Million litres

Unpackaged exports by top 10 destinations – average value



	UK	USA	China mainland	Germany	Canada	Denmark	New Zealand	France	Belgium	Netherlands
2019	$1.09	$1.24	$2.44	$1.24	$1.16	$1.32	$1.32	$1.39	$1.12	$1.17
2020	$1.25	$1.46	$3.03	$1.30	$1.23	$1.42	$1.31	$1.34	$1.22	$1.24
% change	▲ 14%	▲ 18%	▲ 24%	▲ 5%	▲ 6%	▲ 7%	▼ -0%	▼ -4%	▲ 9%	▲ 6%

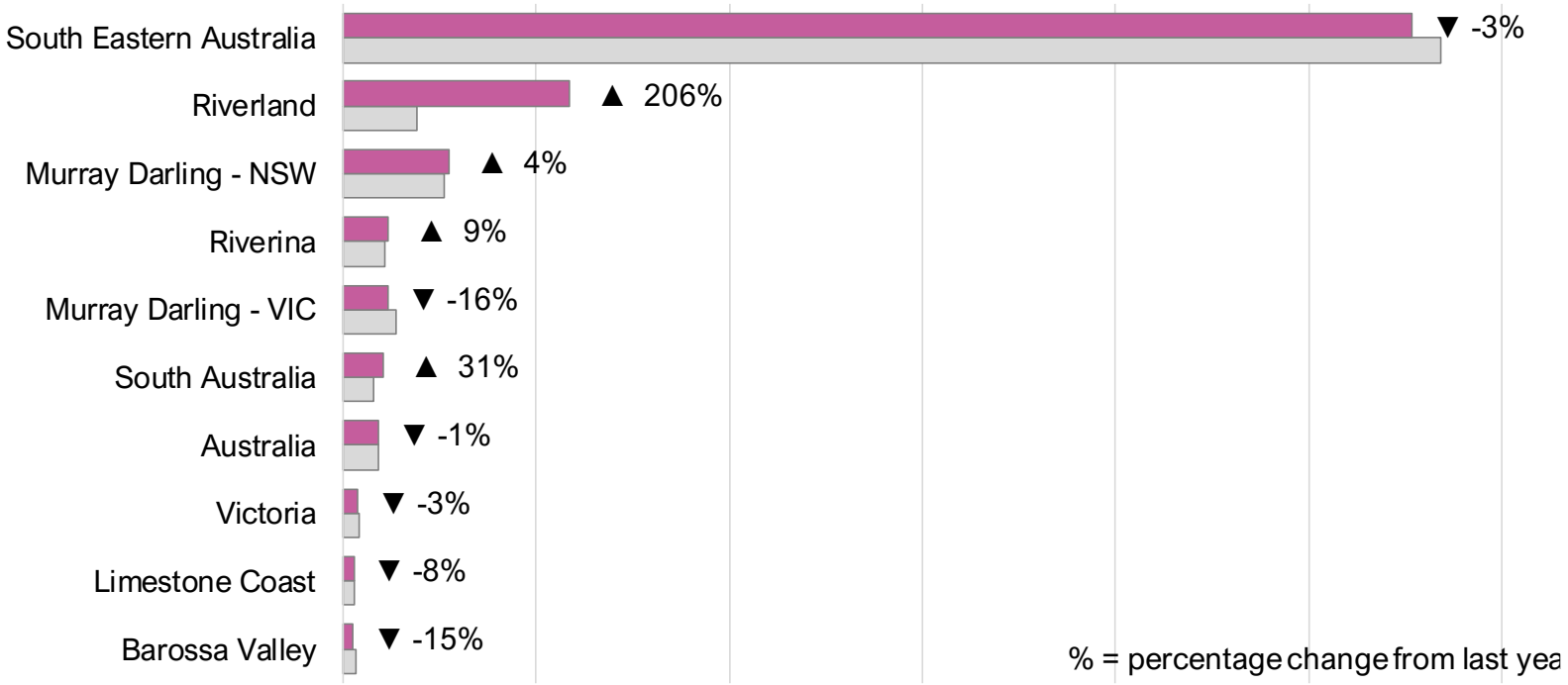
Unpackaged exports by top 10 varieties – volume



	Petit Verdot	Semillon	Colombard	Sauvignon Blanc	Merlot	Pinot Gris/Grigio	Unspecified	Cabernet Sauvignon	Shiraz/Syrah	Chardonnay
2020	3	4	7	19	29	29	34	49	114	119
2019	3	5	7	13	25	27	35	43	103	116

Million litres

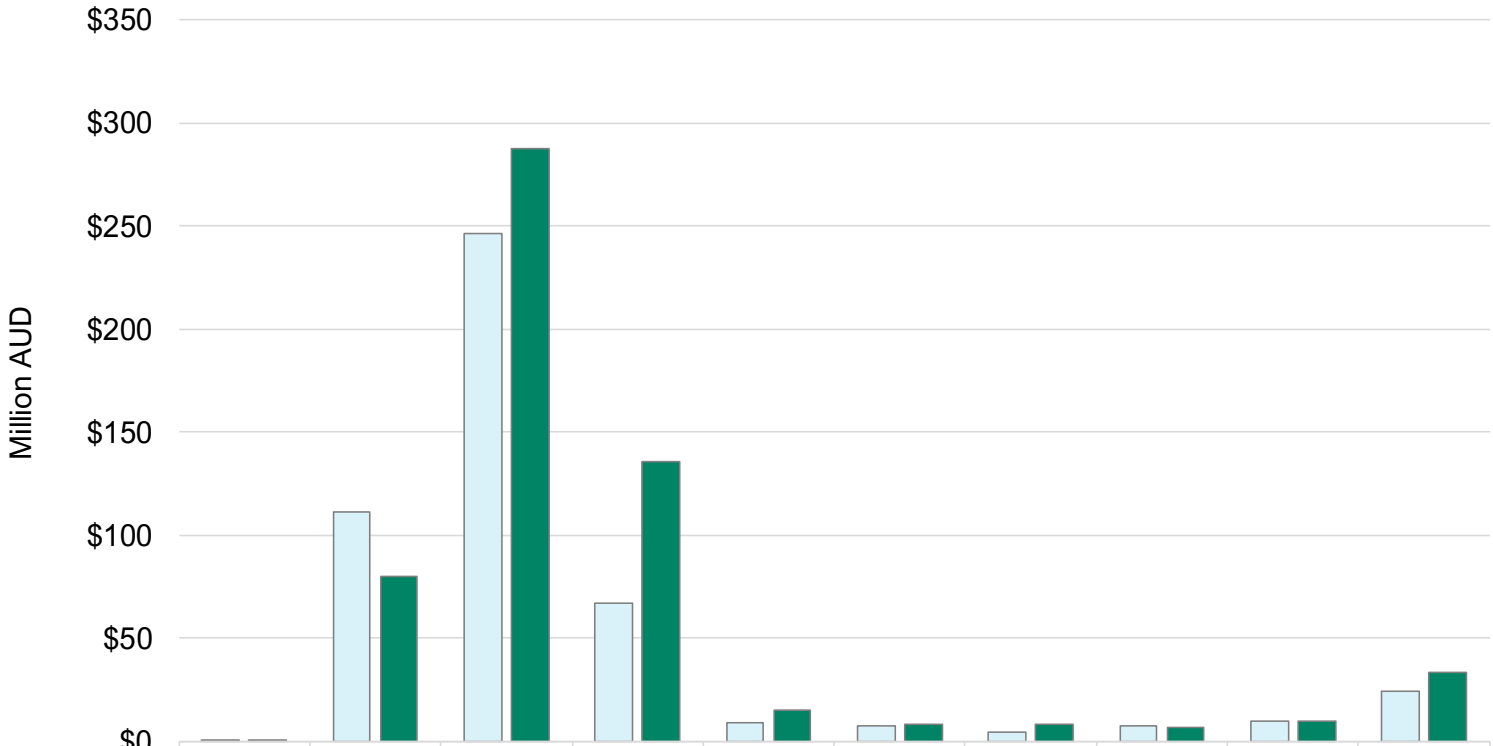
Unpackaged exports by top 10 source GI's – volume



	Barossa Valley	Limestone Coast	Victoria	Australia	South Australia	Murray Darling - VIC	Riverina	Murray Darling - NSW	Riverland	South Eastern Australia
2020	3	3	4	9	10	12	12	27	59	277
2019	3	3	4	9	8	14	11	26	19	284

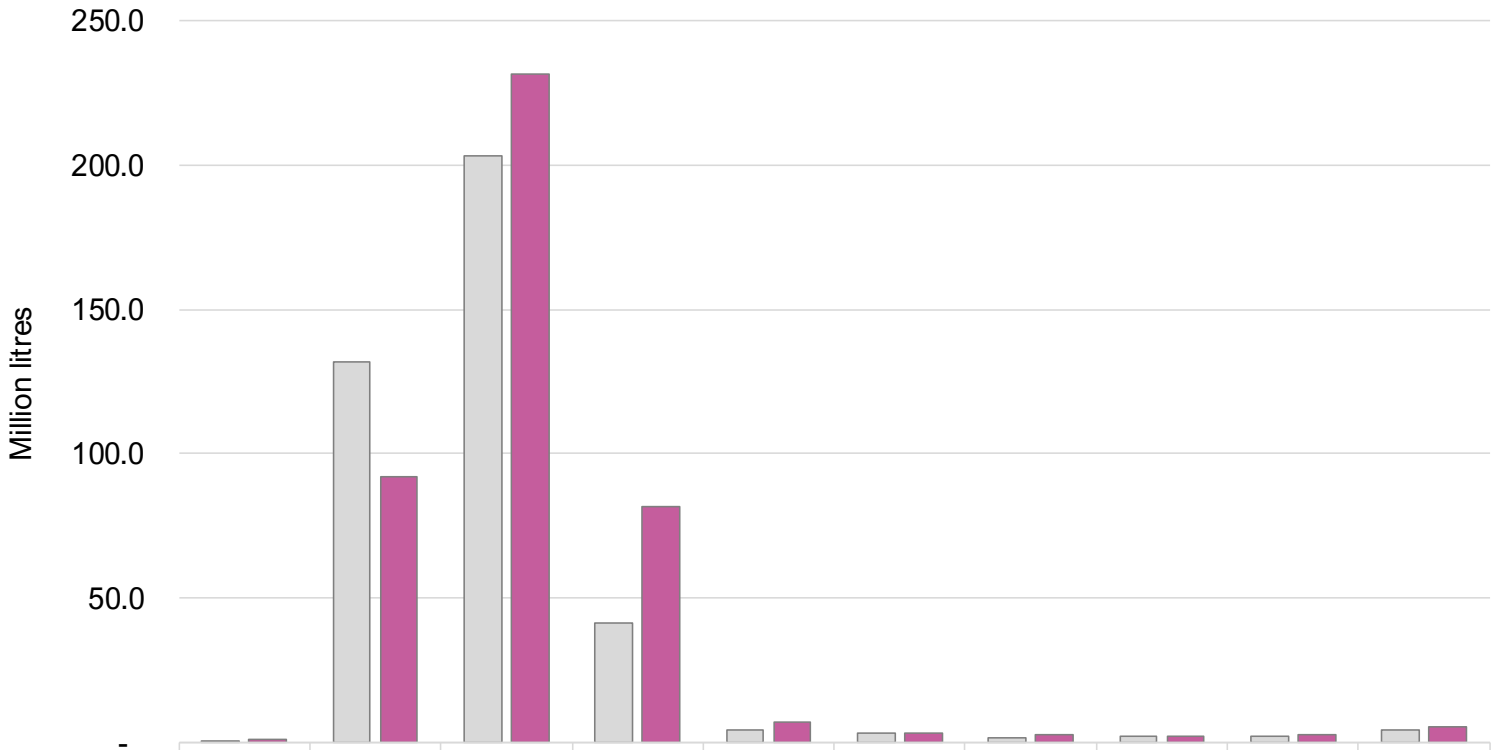
Million litres

Unpackaged exports by price segment – value



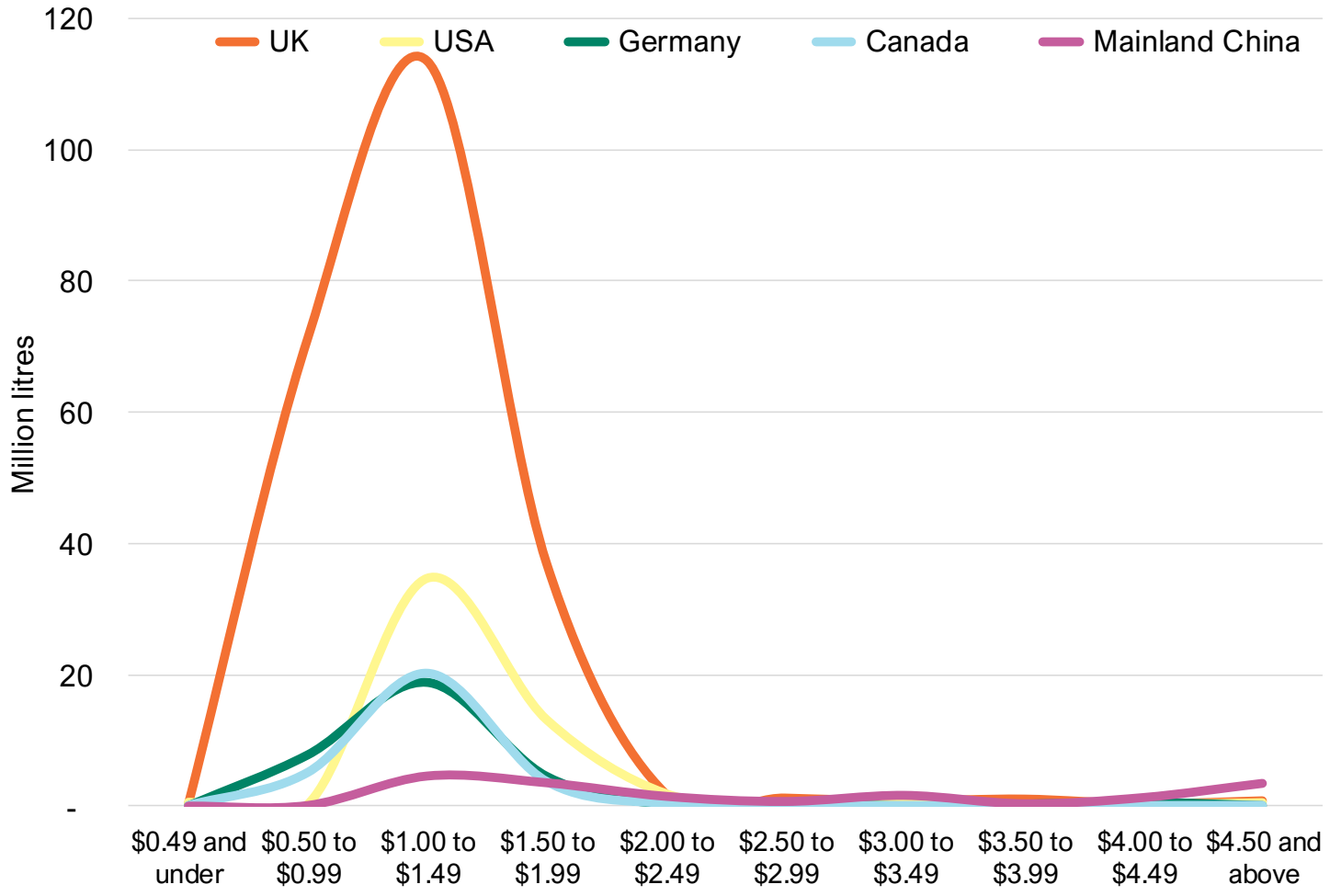
	$0.49 and under	$0.50 to $0.99	$1.00 to $1.49	$1.50 to $1.99	$2.00 to $2.49	$2.50 to $2.99	$3.00 to $3.49	$3.50 to $3.99	$4.00 to $4.49	$4.50 and above
2019	$0	$112	$247	$67	$9	$8	$5	$8	$10	$24
2020	$0	$80	$287	$136	$15	$9	$8	$7	$10	$33
% change	▼ -20%	▼ -28%	▲ 16%	▲ 103	▲ 65%	▲ 9%	▲ 77%	▼ -8%	▲ 4%	▲ 39%

Unpackaged exports by price segment – volume



	$0.49 and under	$0.50 to $0.99	$1.00 to $1.49	$1.50 to $1.99	$2.00 to $2.49	$2.50 to $2.99	$3.00 to $3.49	$3.50 to $3.99	$4.00 to $4.49	$4.50 and above
2019	0.6	132.1	203.5	41.2	4.2	2.9	1.5	2.0	2.3	4.0
2020	1.0	91.8	231.5	81.7	6.8	3.2	2.6	1.9	2.4	5.2
% change	▲ 56%	▼ -30%	▲ 14%	▲ 98%	▲ 62%	▲ 9%	▲ 79%	▼ -7%	▲ 2%	▲ 29%

Unpackaged exports price segment profile – top markets



Notes and definitions

About Wine Australia

Wine Australia supports a competitive wine sector by investing in research, development and adoption (RDA), growing domestic and international markets, protecting the reputation of Australian wine and administering the Export and Regional Wine Support Package (ERWSP).

Wine Australia is an Australian Commonwealth Government statutory authority, established under the Wine Australia Act 2013, and funded by grape growers and winemakers through levies and user-pays charges and the Australian Government, which provides matching funding for RDA investments and funds the ERWSP.

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Exports: 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$.

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

AUD: Australian dollars

Average value: AUD per litre

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.

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.

Destination market: 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.

GI: Geographical Indication as defined by the Register. For more information visit: https://www.wineaustralia.com/labelling/register-of-protected-gis-and-other-terms/geographical-indications