

Wine
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Great Southern
Zone export report:
Packaged wine
MAT December 2019

Important Reading

- This report is updated quarterly.
- The data presented is an aggregation of the zone's regions (see page 5 for included regions)
- All data, unless specifically stated, is for the moving annual total (MAT), in other words, for the 12 months to the month ending that stated on the front cover. All growth rates are for the annual change to the same period.
- All data presented in this report is for wine which is primarily identified by a region belonging to the reported zone. For example one bottle of Yarra Valley/King Valley blend will contribute 750ml towards the Port Phillip Zone report but will be excluded from the North East Victoria Zone report
- A similar scenario will occur when the wine is not regionally identified. For example the same Yarra Valley/King Valley wine which is not identified with a GI on the bottle will be included in a report 'no label claim'
- Furthermore, this report is for packaged wine only and wine exported in bulk containers is not included. Packaged wine includes glass bottle, soft pack and alternative packaging.
- Therefore, this report will give the reader an overview of what is being identified as originating from a region for marketing type purposes, while not providing a full picture of all wine that has been produced and exported from a specific region.

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

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All of Zone's GI claims

Location claim	Volume		Value		Average Value	
	('000 litres)	Change	('000 AUD)	Change	AUD per litre	Change
Frankland River	298	-34%	\$2,903	-31%	\$9.75	4%
Great Southern	259	17%	\$2,738	11%	\$10.58	-5%
Mount Barker	77	-26%	\$859	1%	\$11.18	35%
Denmark	6	-18%	\$95	-41%	\$15.17	-28%
Porongurup	3	-20%	\$45	-17%	\$16.41	4%
Albany	0		\$5		\$12.37	na

All Zone's GI claims over time

	Volume		Value		Average Value AUD per	
	'000 litres	Change	'000 AUD	Change	litre	Change
MAT December 2011	652	27%	\$5,273	20%	\$8.08	-6%
MAT December 2012	730	12%	\$5,620	7%	\$7.70	-5%
MAT December 2013	706	-3%	\$5,436	-3%	\$7.70	0%
MAT December 2014	683	-3%	\$5,273	-3%	\$7.72	0%
MAT December 2015	607	-11%	\$5,753	9%	\$9.47	23%
MAT December 2016	635	5%	\$6,042	5%	\$9.52	0%
MAT December 2017	652	3%	\$6,366	5%	\$9.77	3%
MAT December 2018	788	21%	\$7,750	22%	\$9.84	1%
MAT December 2019	643	-18%	\$6,644	-14%	\$10.34	5%

All of zone's GI claims by country

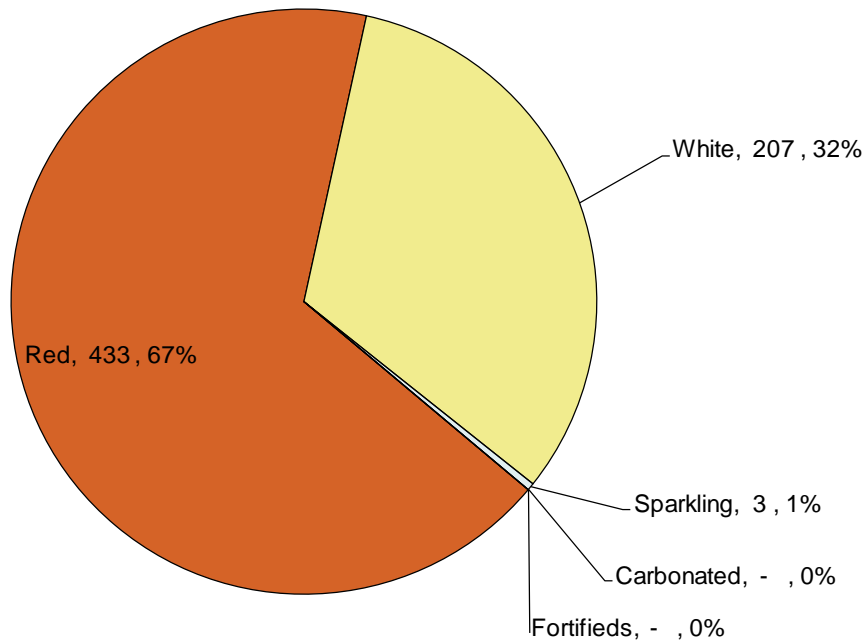
	MAT December									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Volume ('000 litres)										
Belgium	14	8	18	5	7	1	2	3	-	7
Canada	43	53	21	8	27	14	40	16	21	20
China, Pr	129	133	241	362	298	92	182	205	329	279
Denmark	15	20	12	9	26	29	21	12	19	9
Finland	9	79	99	59	38	115	100	134	113	104
Germany, Federal Republic	3	38	4	2	0	1	2	3	1	1
Hong Kong	6	36	27	27	8	11	18	11	14	10
Japan	19	29	19	30	21	22	27	15	25	24
Malaysia	13	3	3	9	5	16	7	11	14	13
Ship	26	1	2	2	1	14	3	8	9	18
Singapore	9	19	11	21	16	23	27	20	17	24
Sweden	0	4	-	-	3	8	7	39	72	12
Thailand	11	6	10	10	6	3	9	1	3	2
United Kingdom	136	162	205	117	155	180	124	125	104	85
United States Of America	42	21	22	28	35	35	37	15	24	8
Value ('000 AUD)										
Belgium	107	28	88	24	49	18	31	41	-	120
Canada	389	435	242	77	274	145	409	182	217	225
China, Pr	1,230	1,083	1,778	2,624	2,098	1,303	1,844	2,602	3,586	3,216
Denmark	123	159	95	65	184	239	167	107	179	83
Finland	53	479	606	375	284	842	717	932	906	893
Germany, Federal Republic	25	279	27	18	2	12	32	30	14	13
Hong Kong	70	433	362	281	84	130	263	141	190	131
Japan	179	257	201	275	225	226	263	144	296	285
Malaysia	118	42	73	69	55	141	97	138	153	124
Ship	198	24	26	28	8	93	48	101	129	110
Singapore	144	266	135	295	190	295	334	269	208	284
Sweden	2	31	-	-	41	80	74	279	516	101
Thailand	99	44	65	58	42	23	90	13	25	18
United Kingdom	926	1,130	1,389	780	1,090	1,401	1,023	943	855	710
United States Of America	338	155	172	251	315	375	356	120	224	69

Packaged exports by price point and destination

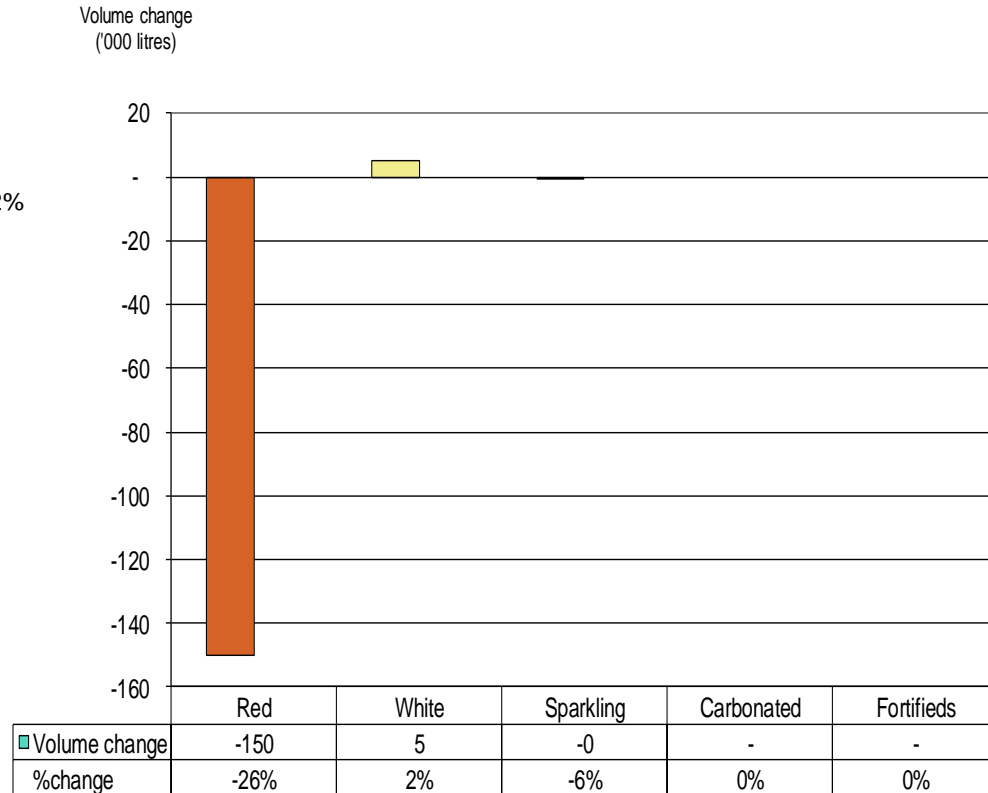
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10 to \$19.99		Above \$20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
China, Pr	-	++	38.2	8%	62.6	-39%	26.1	-52%	120.0	25%	32.4	-19%	279.4	-15%
Hong Kong	-	na	-	na	1.8	-31%	3.5	-6%	4.1	-39%	0.8	-39%	10.2	-29%
Canada	-	na	0.6	20%	3.6	-53%	2.8	-12%	13.0	34%	0.4	9%	20.4	-5%
Singapore	-	na	0.0	na	0.1	na	2.8	-37%	19.8	76%	1.3	-1%	24.1	41%
United Kingdom	-	na	-	na	56.2	-14%	19.3	1%	8.4	-54%	1.6	33%	85.5	-18%
United States Of America	-	na	-	na	3.2	-67%	1.2	-65%	3.2	-68%	0.1	-86%	7.7	-68%
Malaysia	-	na	-	na	6.6	47%	1.7	-53%	3.8	-18%	0.7	-57%	12.7	-11%
Sweden	-	na	-	++	-	-100%	12.4	139%	-	na	-	++	12.4	-83%
Korea, R	-	na	-	na	-	na	1.8	na	1.5	na	0.5	0%	3.7	722%
Denmark	-	na	-	na	4.0	-59%	3.7	11%	1.3	-77%	0.2	4%	9.2	-52%
Finland	-	na	-	na	-	-100%	100.4	4%	4.0	247%	-	na	104.4	-8%
Belgium	-	na	-	na	-	++	-	na	7.1	na	0.3	na	7.5	na
Japan	-	na	-	na	4.1	-42%	1.8	-36%	18.0	30%	0.4	-71%	24.3	-3%
Ship	0.0	na	9.5	na	4.8	na	-	na	3.4	-59%	0.1	-94%	17.7	90%
Sri Lanka	-	na	-	++	-	na	3.7	na	0.0	na	-	na	3.7	na
Other	-	na	1.4	-53%	5.1	-22%	7.1	43%	5.1	-42%	1.0	-50%	19.8	-22%
Total	0.0	na	49.7	27%	152.0	-49%	188.3	-8%	212.8	9%	39.8	-23%	642.6	-18%

Packaged exports by colour/wine style

Volume ('000 litres)

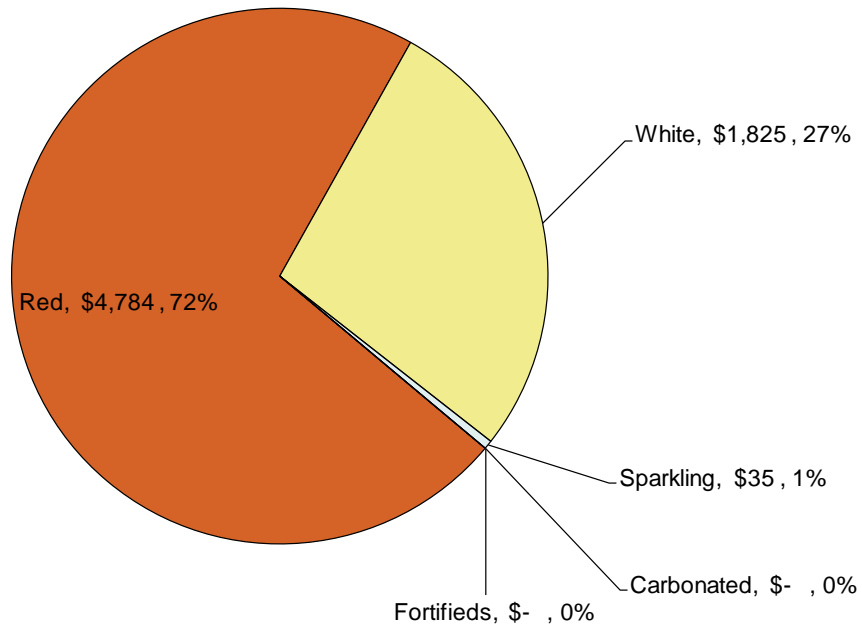


Change in volume

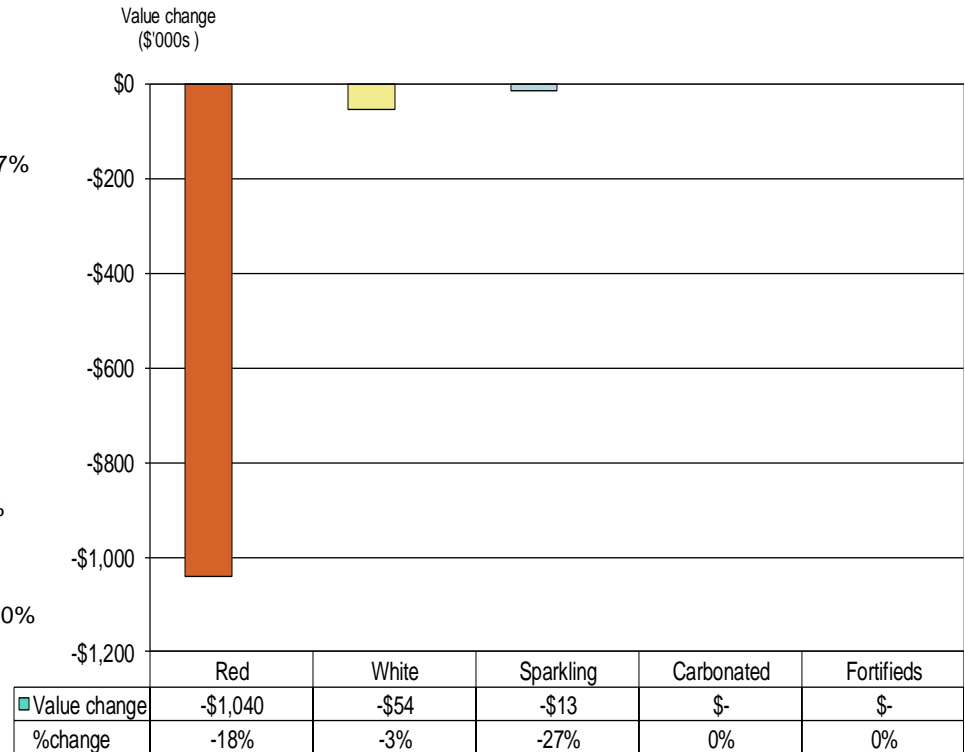


Packaged exports by colour/wine style

Value ('000 AUD)

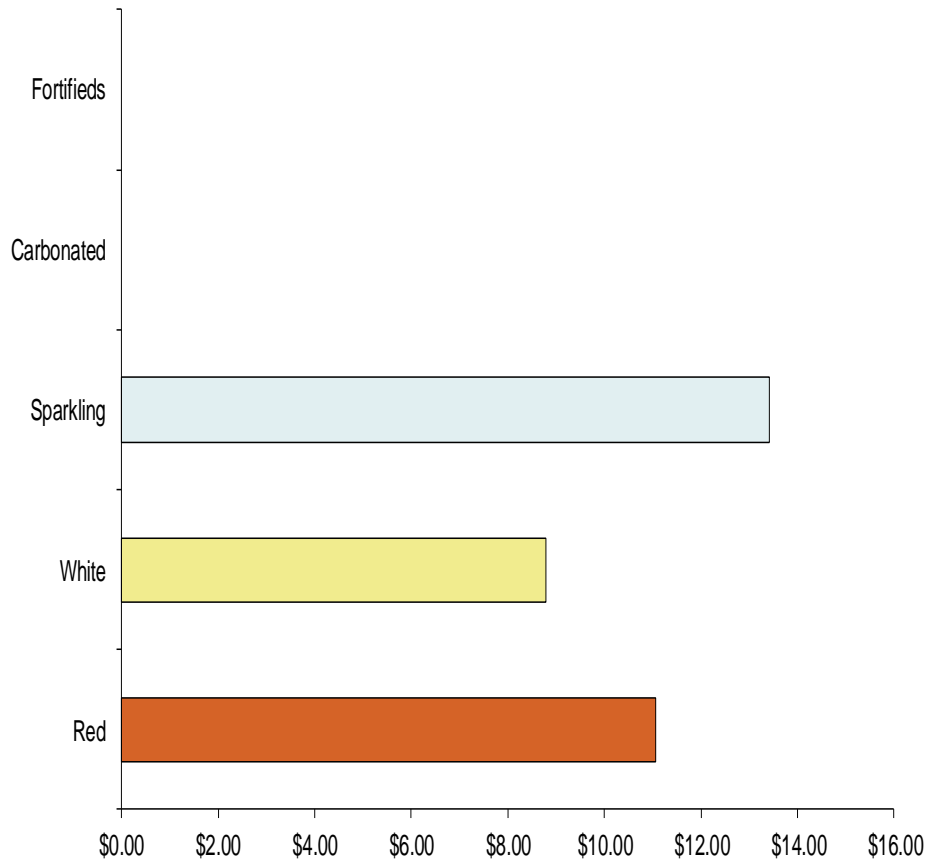


Change in value

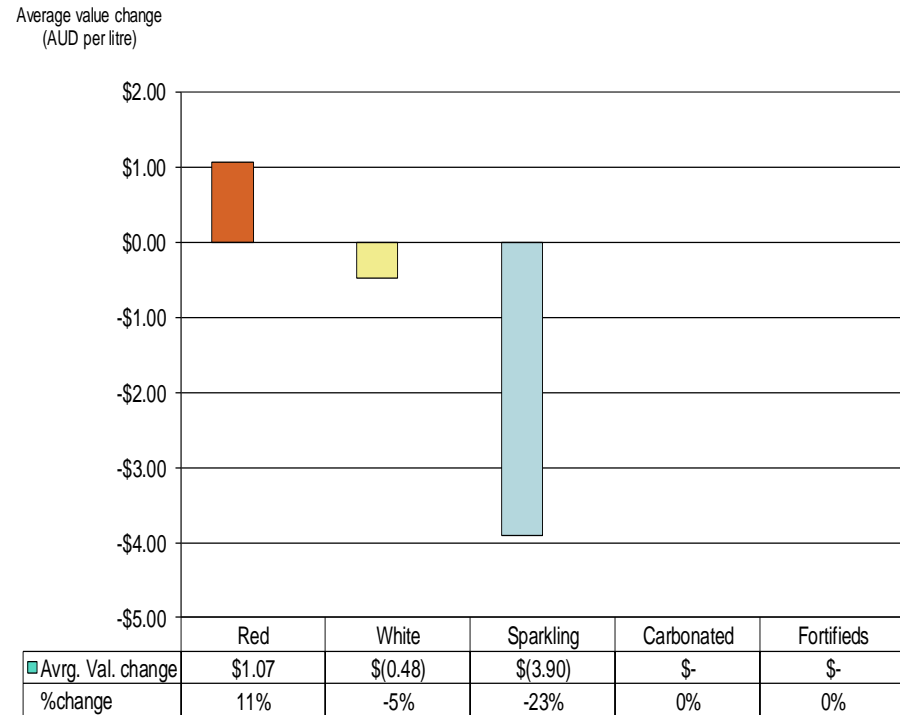


Packaged exports by colour/wine style

Average value (AUD per litre)



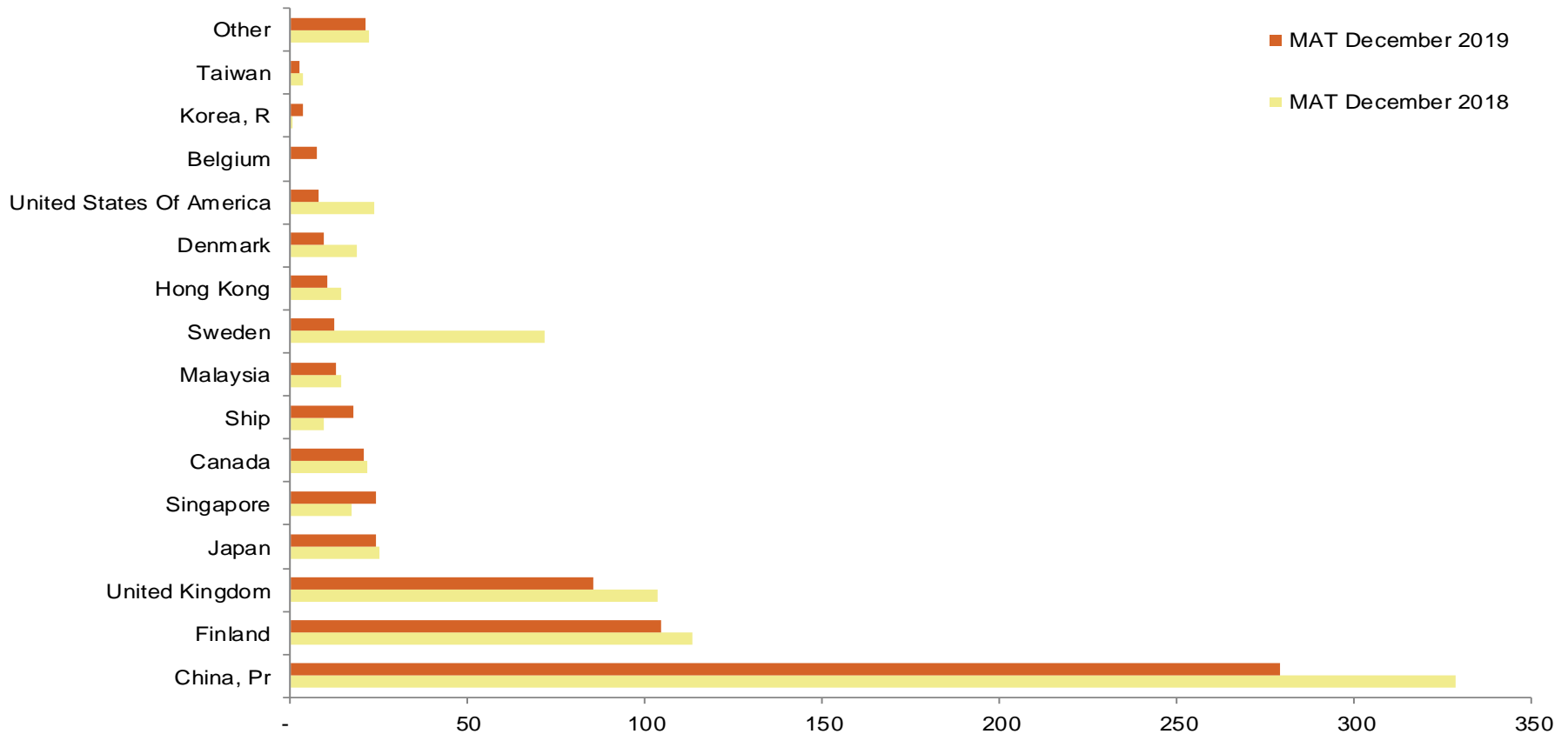
Change in average value



	Red	White	Sparkling	Carbonated	Fortified
Avrg. Val. change	\$1.07	\$(0.48)	\$(3.90)	\$-	\$-
%change	11%	-5%	-23%	0%	0%

Packaged exports by top 15 destinations

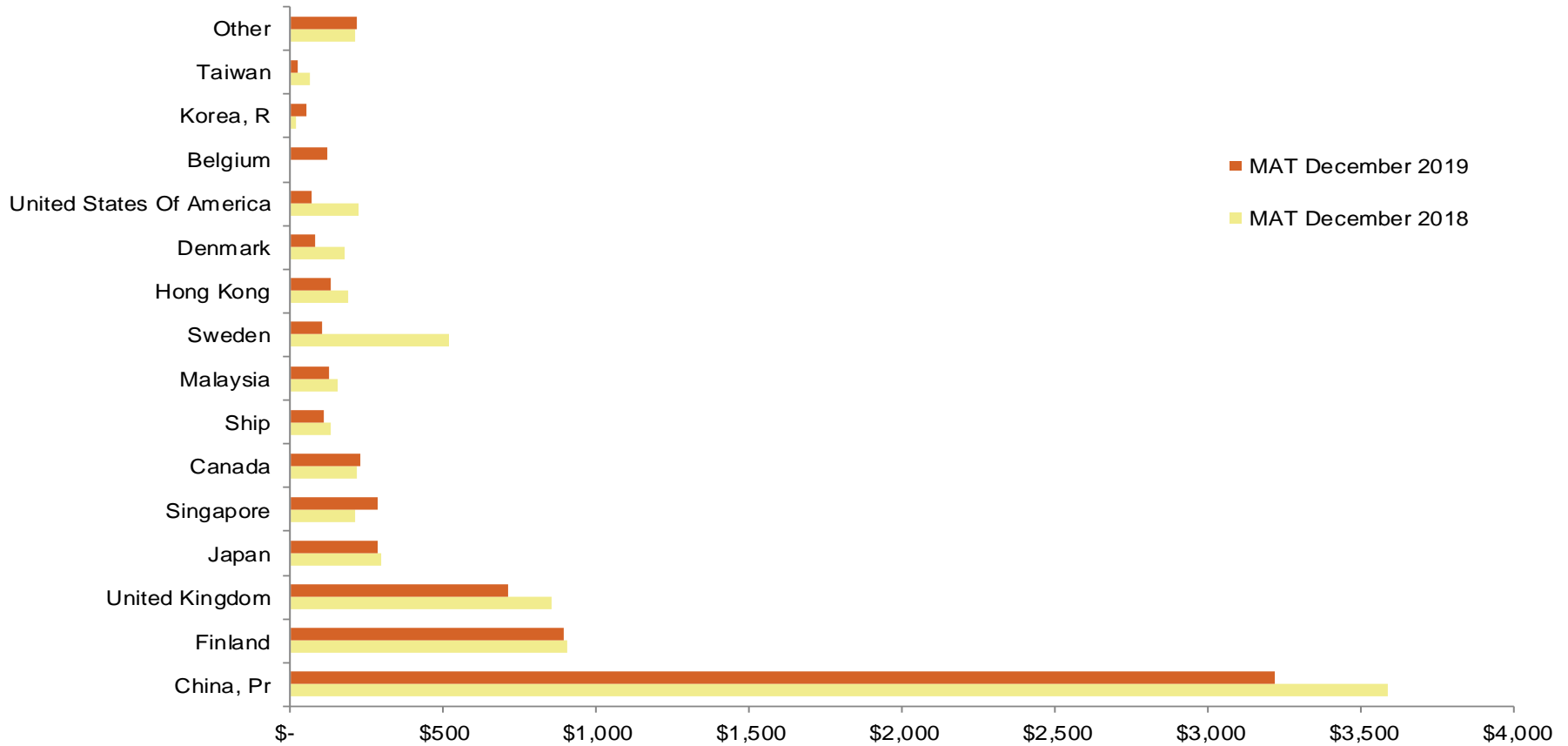
Volume ('000 litres)



	China, Pr	Finland	United Kingdom	Japan	Singapore	Canada	Ship	Malaysia	Sweden	Hong Kong	Denmark	United States Of America	Belgium	Korea, R	Taiwan	Other
■ MAT December 2019	279	104	85	24	24	20	18	13	12	10	9	8	7	4	2	21
■ MAT December 2018	329	113	104	25	17	21	9	14	72	14	19	24	-	0	3	22

Packaged exports by top 15 destinations

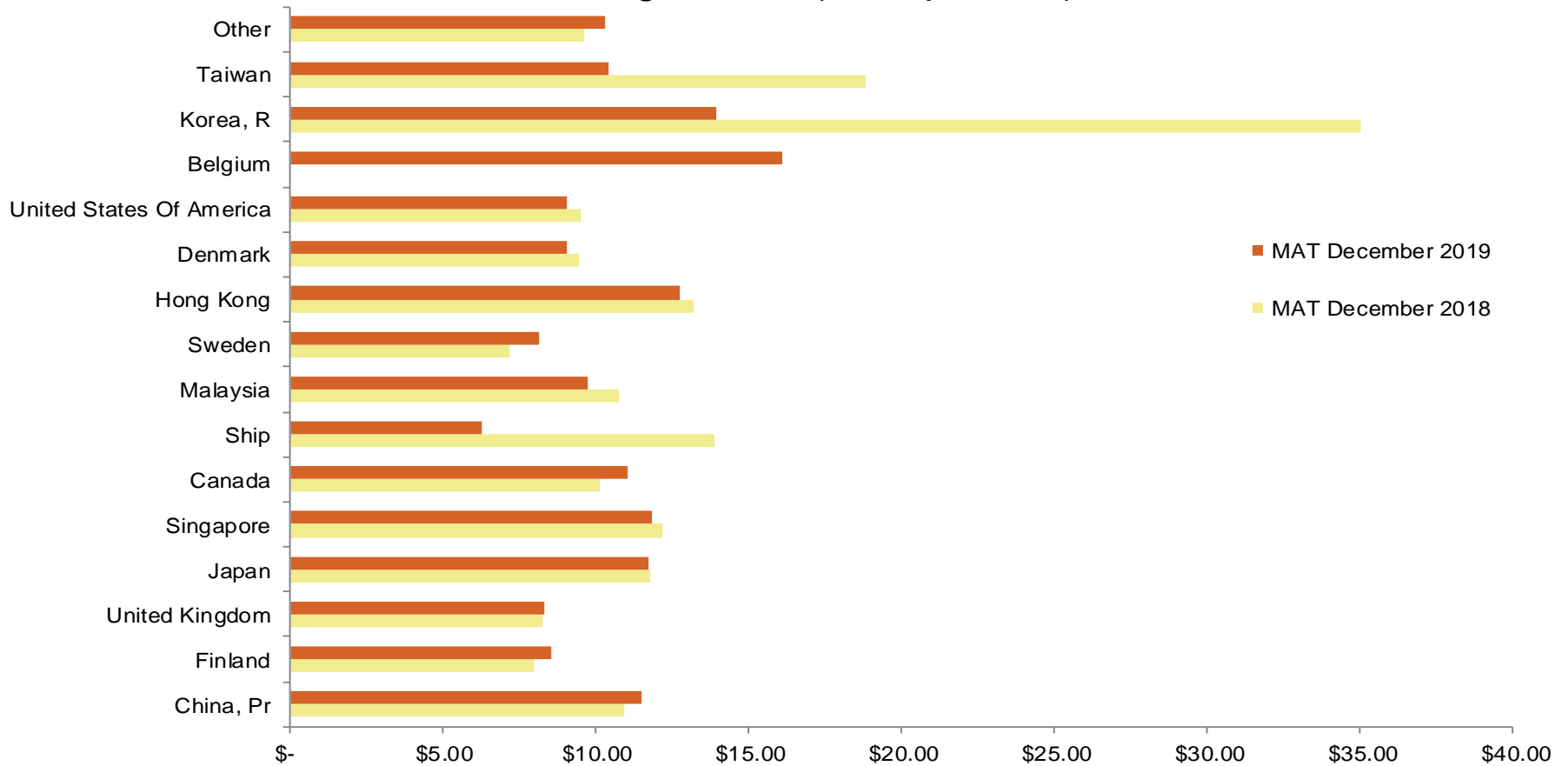
Value ('000 AUD)



	China, Pr	Finland	United Kingdom	Japan	Singapore	Canada	Ship	Malaysia	Sweden	Hong Kong	Denmark	United States Of America	Belgium	Korea, R	Taiwan	Other
■ MAT December 2019	\$3,216	\$893	\$710	\$285	\$284	\$225	\$110	\$124	\$101	\$131	\$83	\$69	\$120	\$52	\$25	\$217
■ MAT December 2018	\$3,586	\$906	\$855	\$296	\$208	\$217	\$129	\$153	\$516	\$190	\$179	\$224	\$-	\$16	\$63	\$212

Packaged exports by top 15 destinations

Average Value (AUD per litre)

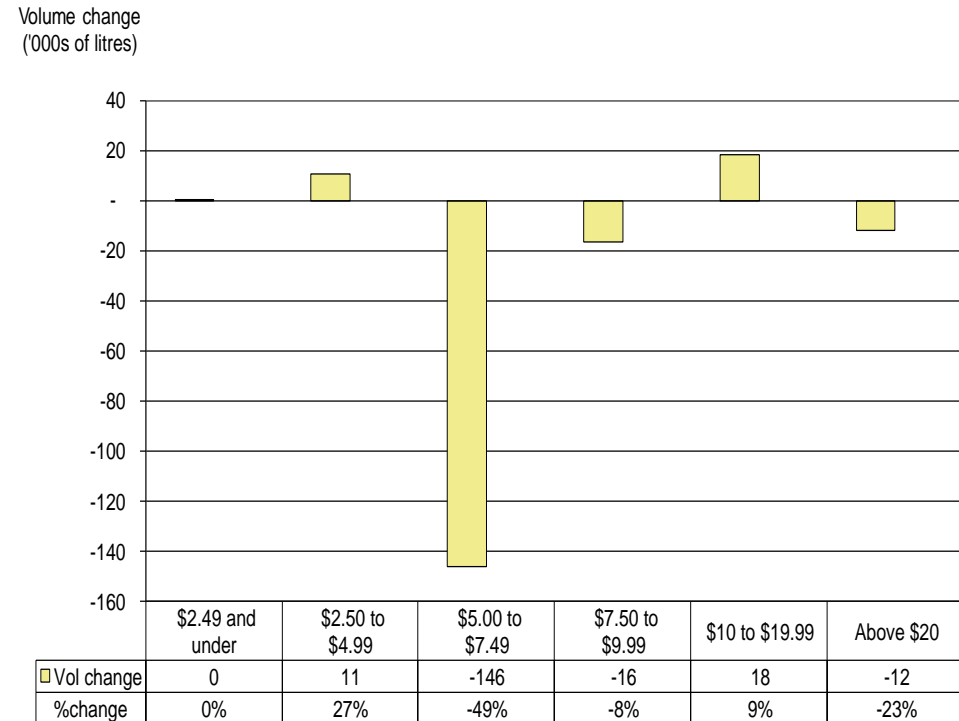
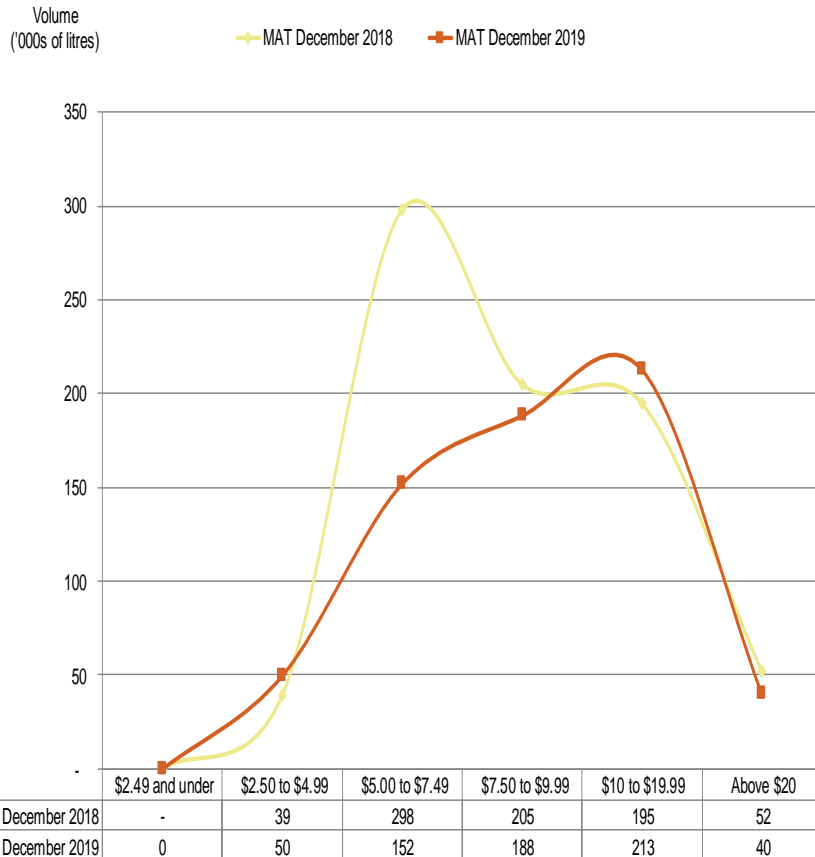


	China, Pr	Finland	United Kingdom	Japan	Singapore	Canada	Ship	Malaysia	Sweden	Hong Kong	Denmark	United States Of America	Belgium	Korea, R	Taiwan	Other
MAT December 2019	\$11.51	\$8.55	\$8.31	\$11.72	\$11.81	\$11.03	\$6.24	\$9.72	\$8.12	\$12.76	\$9.05	\$9.03	\$16.08	\$13.94	\$10.42	\$10.30
MAT December 2018	\$10.90	\$7.99	\$8.25	\$11.76	\$12.18	\$10.12	\$13.87	\$10.72	\$7.18	\$13.21	\$9.46	\$9.47	\$-	\$34.99	\$18.79	\$9.60

Packaged exports by price point

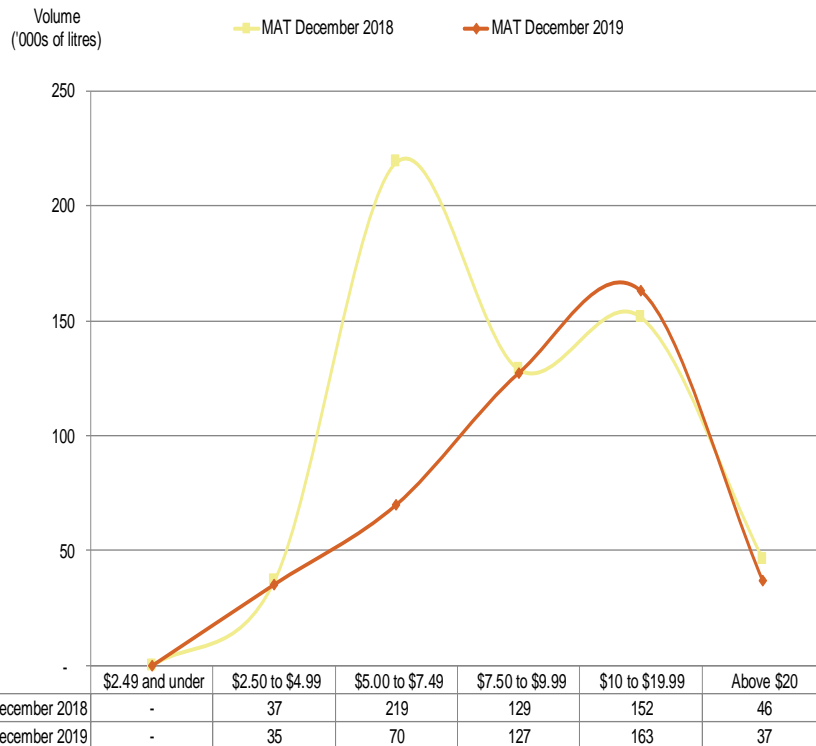
Volume ('000 litres)

Change in volume

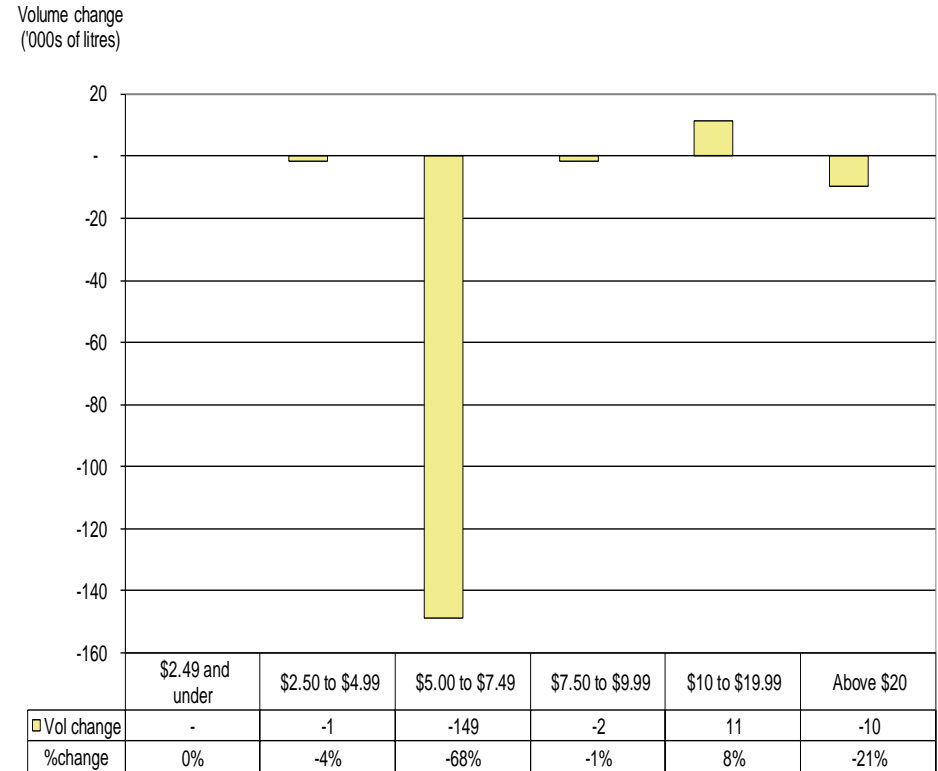


Packaged red wine exports by price point

Volume ('000 litres)

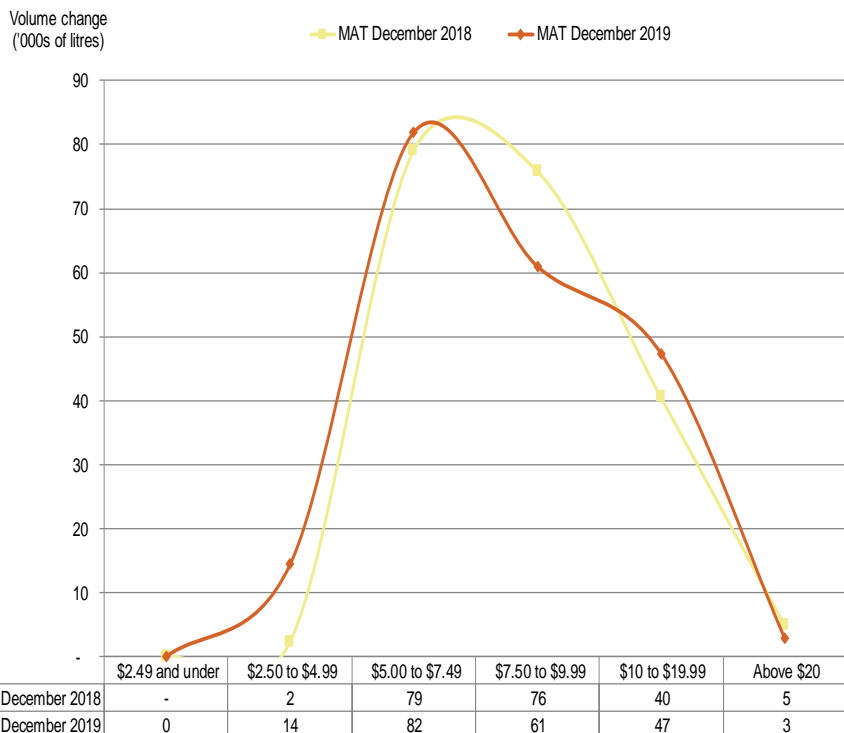


Change in volume

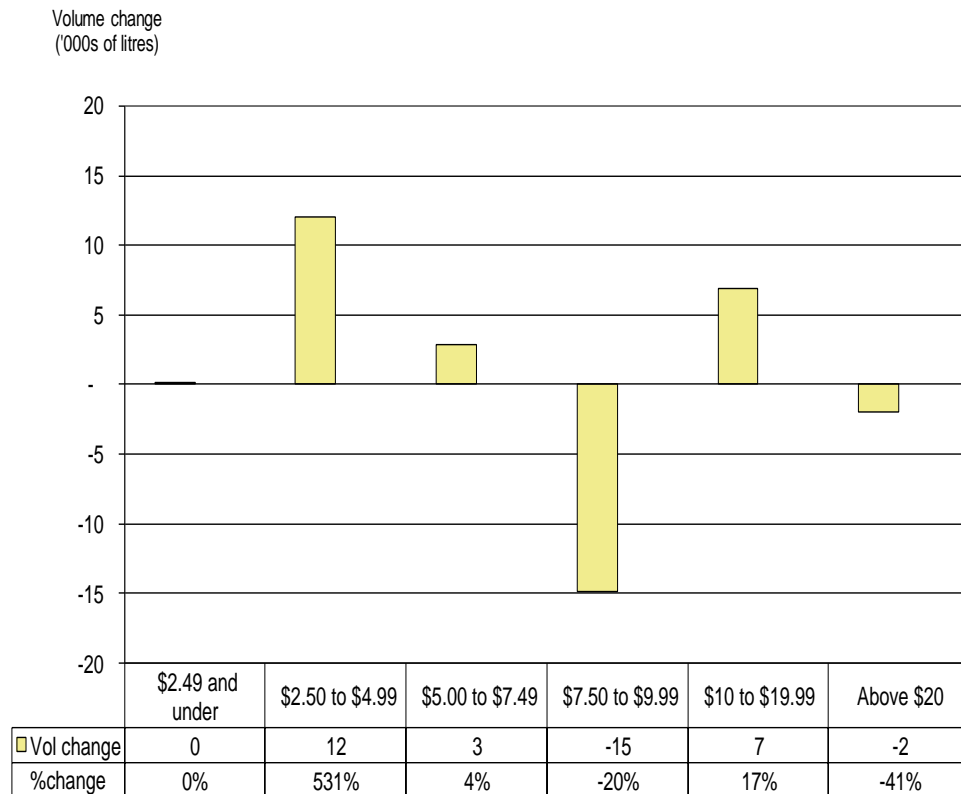


Packaged white wine exports by price point

Volume ('000 litres)



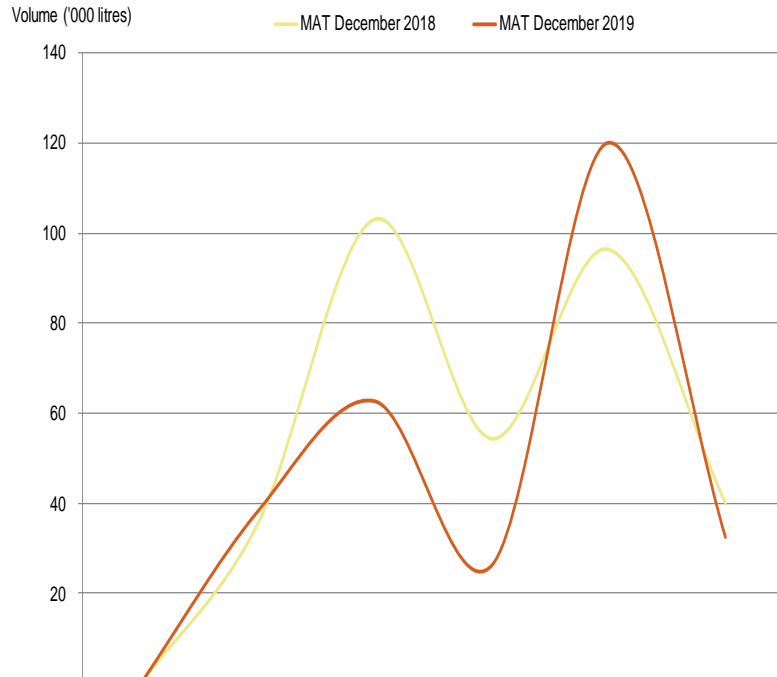
Change in volume



Packaged wine exports to China, Pr

Overview

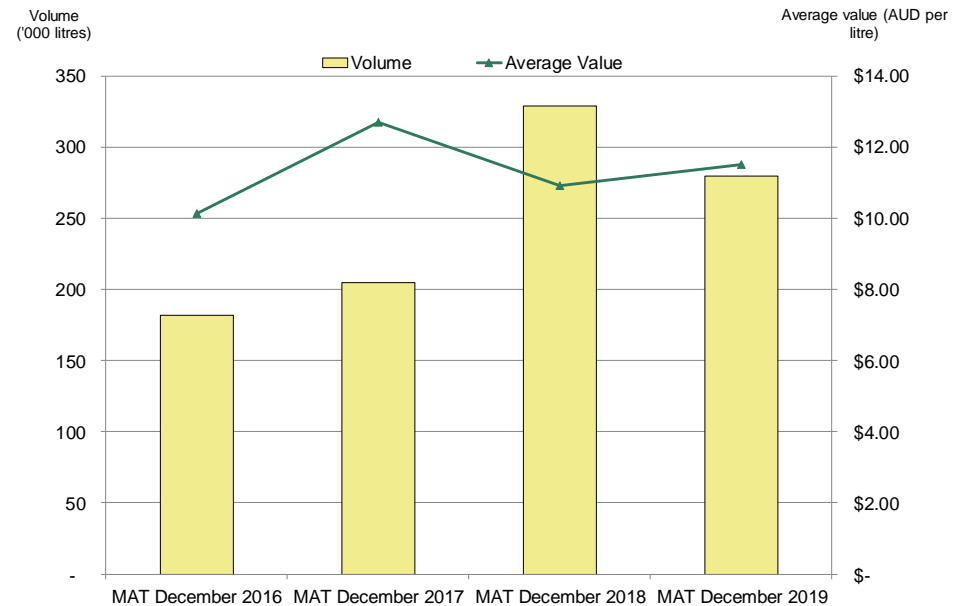
Total wine by price point



	\$2.49 and under	\$2.50 to \$4.99	\$5.00 to \$7.49	\$7.50 to \$9.99	\$10 to \$19.99	Above \$20
MAT December 2018	-	35,402	102,956	54,261	96,253	39,953
MAT December 2019	-	38,185	62,622	26,118	120,047	32,441

		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	297,947	246,735	-17%
	Value (AUD)	\$3,197,984	\$2,922,743	-9%
	Average value	\$10.73	\$11.85	10%
White wine	Volume (litres)	29,968	30,346	1%
	Value (AUD)	\$364,589	\$261,043	-28%
	Average value	\$12.17	\$8.60	-29%
Total wine	Volume (litres)	328,824	279,412	-15%
	Value (AUD)	3,585,609	3,216,017	-10%
	Average value	\$10.90	\$11.51	6%

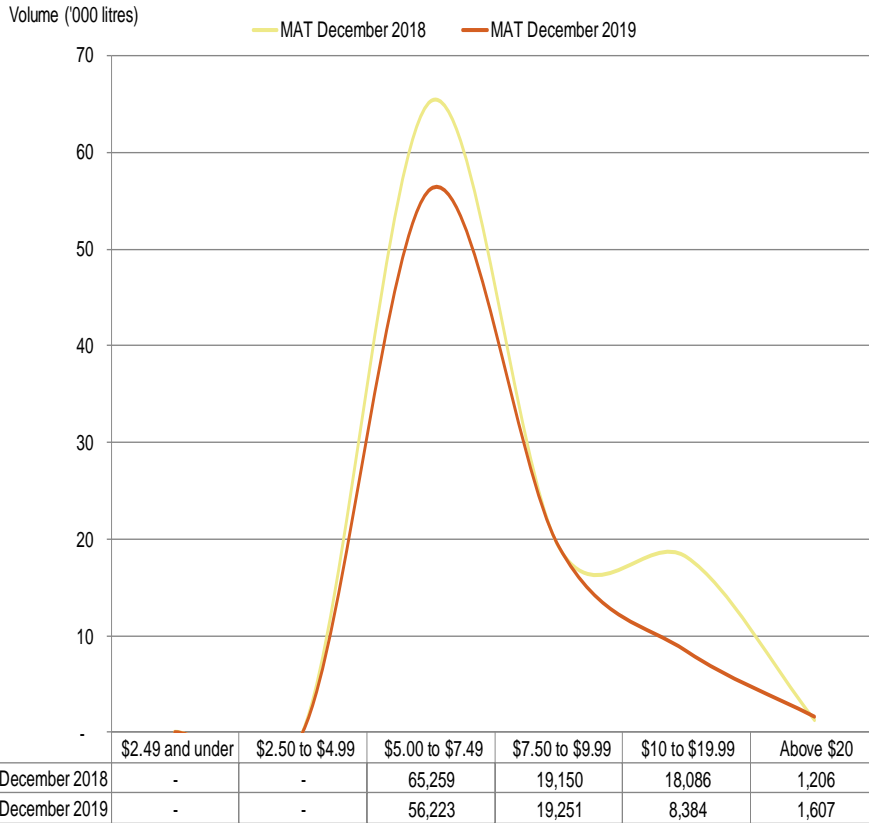
Total volume and average value



Packaged wine exports to United Kingdom

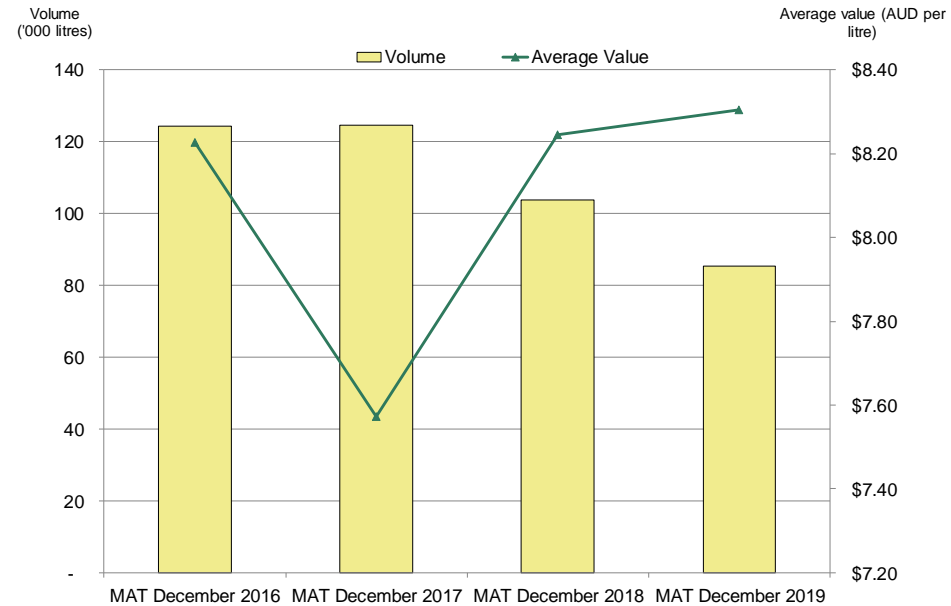
Overview

Total wine by price point



		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	42,368	25,619	-40%
	Value (AUD)	\$383,508	\$263,583	-31%
	Average value	\$9.05	\$10.29	14%
White wine	Volume (litres)	61,315	59,846	-2%
	Value (AUD)	\$471,129	\$446,260	-5%
	Average value	\$7.68	\$7.46	-3%
Total wine	Volume (litres)	103,700	85,464	-18%
	Value (AUD)	\$855,056	\$709,843	-17%
	Average value	\$8.25	\$8.31	1%

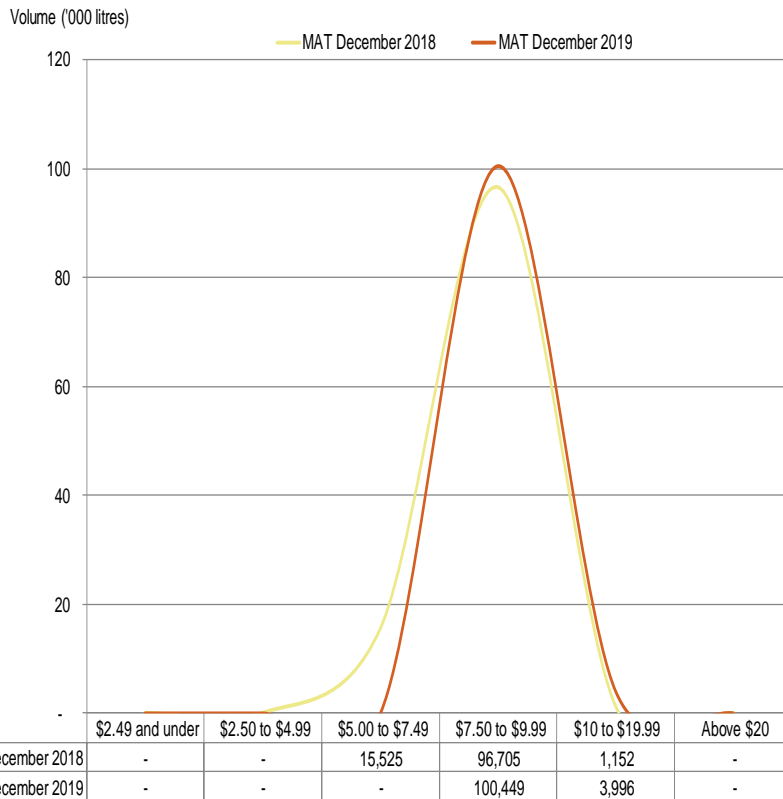
Total volume and average value



Packaged wine exports to Finland

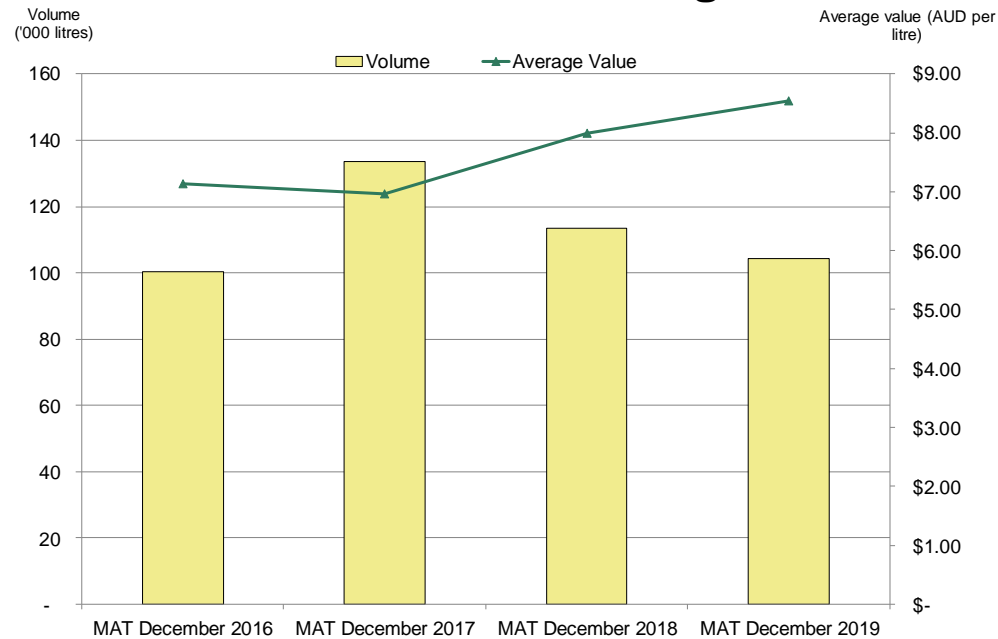
Overview

Total wine by price point



		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	68,391	60,741	-11%
	Value (AUD)	\$536,233	\$510,199	-5%
	Average value	\$7.84	\$8.40	7%
White wine	Volume (litres)	44,991	43,704	-3%
	Value (AUD)	\$369,295	\$382,571	4%
	Average value	\$8.21	\$8.75	7%
Total wine	Volume (litres)	113,382	104,445	-8%
	Value (AUD)	\$905,528	\$892,770	-1%
	Average value	\$7.99	\$8.55	7%

Total volume and average value

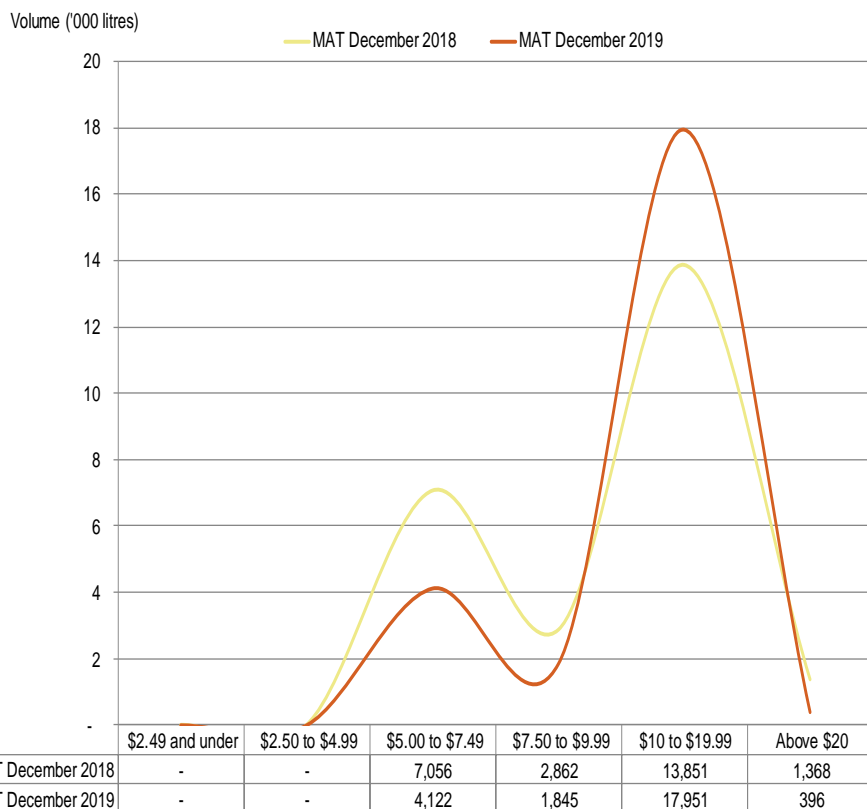


Packaged wine exports to Japan

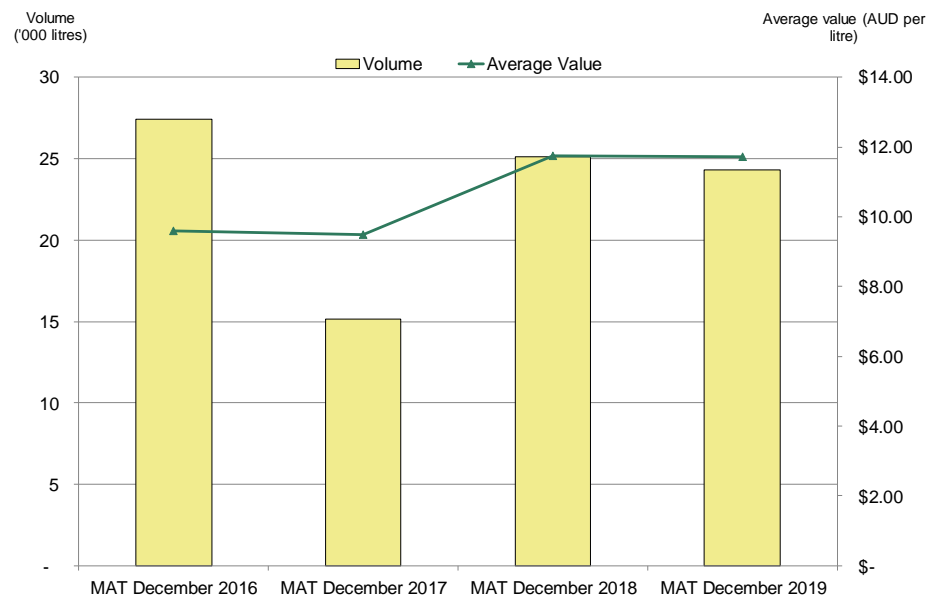
Overview

		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	11,079	6,606	-40%
	Value (AUD)	\$149,031	\$78,514	-47%
	Average value	\$13	\$12	-12%
White wine	Volume (litres)	12,186	17,708	45%
	Value (AUD)	\$121,575	\$206,393	70%
	Average value	\$9.98	\$11.66	17%
Total wine	Volume (litres)	25,137	24,314	-3%
	Value (AUD)	\$295,630	\$284,907	-4%
	Average value	\$11.76	\$11.72	0%

Total wine by price point



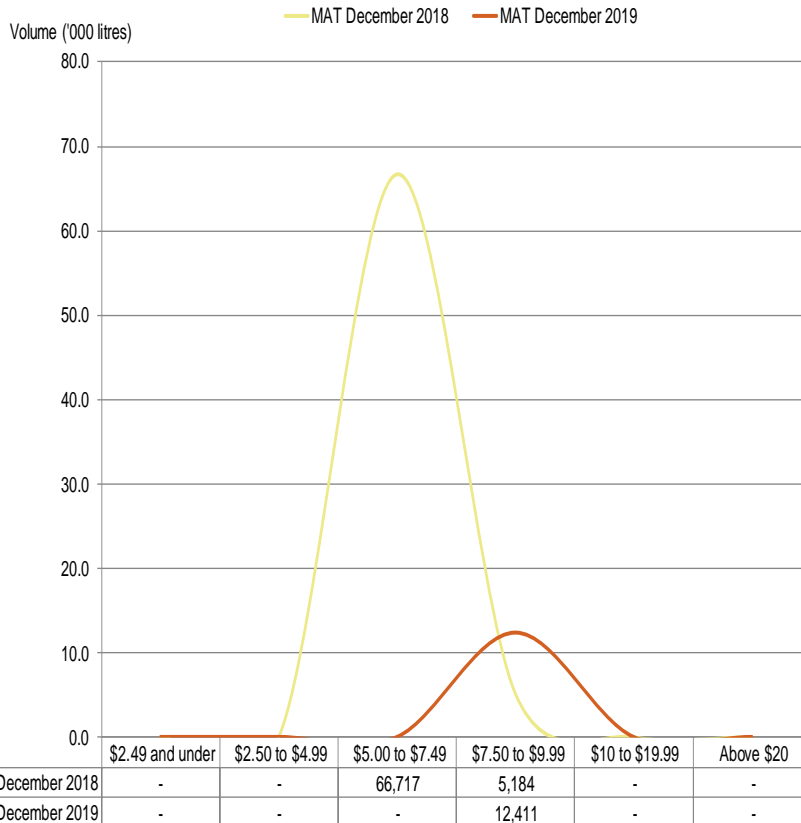
Total volume and average value



Packaged wine exports to Sweden

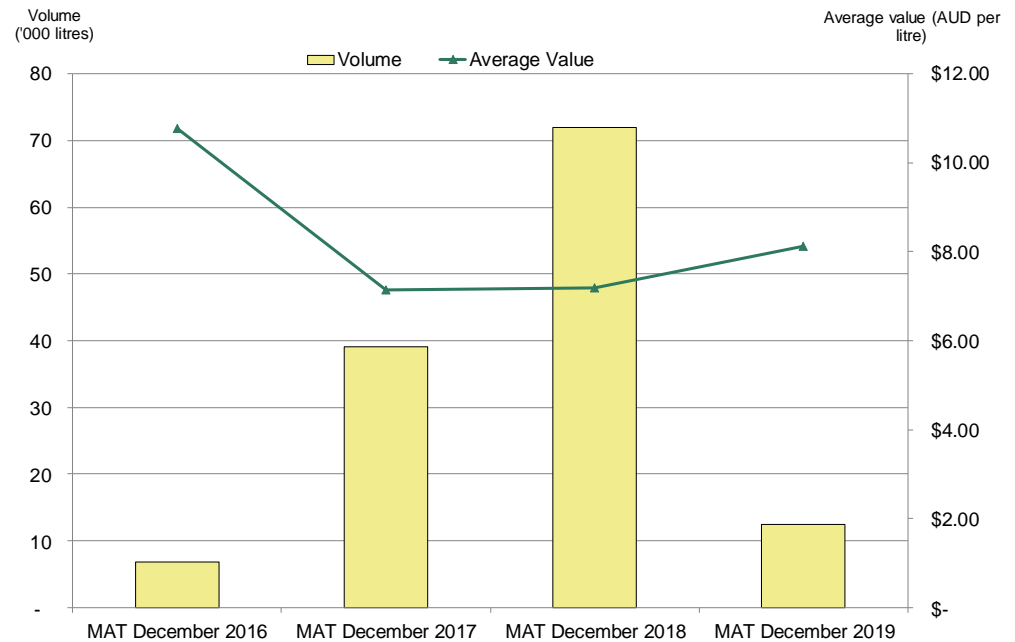
Overview

Total wine by price point



		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	69,039	9,531	-86%
	Value (AUD)	\$489,453	\$73,591	-85%
	Average value	\$7.09	\$7.72	9%
White wine	Volume (litres)	2,862	2,880	1%
	Value (AUD)	\$27,030	\$27,200	1%
	Average value	\$9.44	\$9.44	0%
Total wine	Volume (litres)	71,901	12,411	-83%
	Value (AUD)	\$516,483	\$100,791	-80%
	Average value	\$7.18	\$8.12	13%

Total volume and average value



Notes & Definitions

Export approvals: Wine approved by 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 AUD 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 Wine Australia and the ABS in the method of converting the value of exports denominated in foreign currency to AUD. In the case of the 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 Wine Australia and the 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 to the end of 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

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.

GI: Geographical indications identify wines as originating in a region or locality.

Notes & Definitions (continued)

Still wine: Still wine in bottles, casks, flagons or bulk containers.

Bulk: Wine shipped for repackaging elsewhere. This may involve containers with a capacity of 20 litres or more but will most often mean large shipping containers ranging in size 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
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