

Wine
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Great Southern
Zone export report:
Packaged wine
MAT March 2020

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	261	-37%	\$2,645	-28%	\$10.12	15%
Great Southern	242	15%	\$2,557	10%	\$10.58	-4%
Mount Barker	75	-30%	\$853	-2%	\$11.33	39%
Denmark	5	-28%	\$79	-3%	\$16.91	36%
Porongurup	2	31%	\$32	-20%	\$12.99	-39%
Albany	0		\$5		\$12.37	na

All Zone's GI claims over time

	Volume		Value		Average Value	
	'000 litres	Change	'000 AUD	Change	AUD per litre	Change
MAT March 2012	640	20%	\$5,059	8%	\$7.90	-10%
MAT March 2013	722	13%	\$5,545	10%	\$7.68	-3%
MAT March 2014	811	12%	\$6,222	12%	\$7.68	0%
MAT March 2015	586	-28%	\$4,754	-24%	\$8.11	6%
MAT March 2016	600	2%	\$5,862	23%	\$9.77	21%
MAT March 2017	615	3%	\$5,859	0%	\$9.53	-3%
MAT March 2018	722	17%	\$7,410	26%	\$10.26	8%
MAT March 2019	743	3%	\$6,997	-6%	\$9.42	-8%
MAT March 2020	586	-21%	\$6,171	-12%	\$10.53	12%

All of zone's GI claims by country

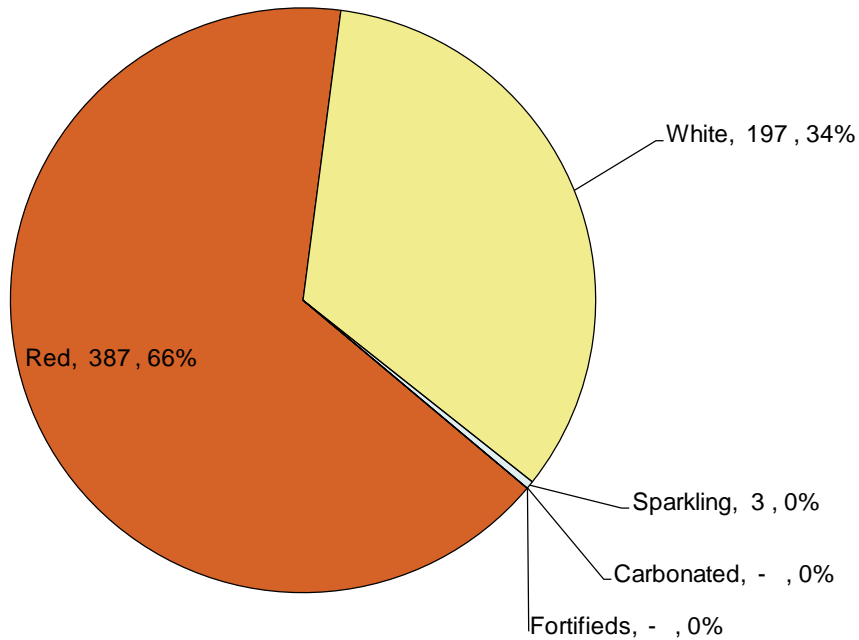
	MAT March									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Volume ('000 litres)										
Belgium	14	12	14	10	2	1	2	3	-	7
Canada	60	34	19	12	24	25	25	26	15	21
China, Pr	135	151	253	491	141	101	176	253	304	244
Denmark	17	19	13	9	29	27	19	16	15	9
Finland	18	92	98	43	63	112	110	125	112	105
Germany, Federal Republic	39	5	0	2	0	2	4	1	1	2
Hong Kong	13	36	31	18	10	12	17	13	12	9
Japan	16	27	21	28	24	30	17	17	24	25
Malaysia	14	3	3	8	6	16	9	11	16	10
Ship	19	1	3	1	14	3	2	10	9	27
Singapore	10	19	10	22	20	24	21	22	23	15
Sweden	0	4	-	-	5	6	7	62	60	2
Thailand	1	8	9	11	5	4	9	3	4	2
United Kingdom	93	174	187	118	162	155	138	121	104	73
United States Of America	38	20	24	19	43	42	26	14	22	9
Value ('000 AUD)										
Belgium	107	70	46	63	10	18	31	41	-	120
Canada	485	313	225	123	254	285	224	284	149	236
China, Pr	1,356	1,068	1,854	3,547	1,124	1,428	1,850	3,339	3,053	2,828
Denmark	131	150	107	61	214	220	159	138	148	87
Finland	105	559	605	278	456	803	796	905	906	924
Germany, Federal Republic	290	33	3	18	2	15	56	12	6	14
Hong Kong	139	437	375	211	100	137	264	177	148	122
Japan	164	245	220	259	242	266	192	186	262	299
Malaysia	131	34	74	62	64	148	113	137	154	104
Ship	152	24	41	14	80	36	40	143	107	153
Singapore	162	271	125	313	238	307	263	279	277	191
Sweden	2	31	-	-	64	57	74	441	435	20
Thailand	24	60	57	56	37	26	86	24	31	21
United Kingdom	720	1,222	1,254	816	1,141	1,214	1,154	924	841	709
United States Of America	287	156	218	162	379	471	220	114	202	80

Packaged exports by price point and destination

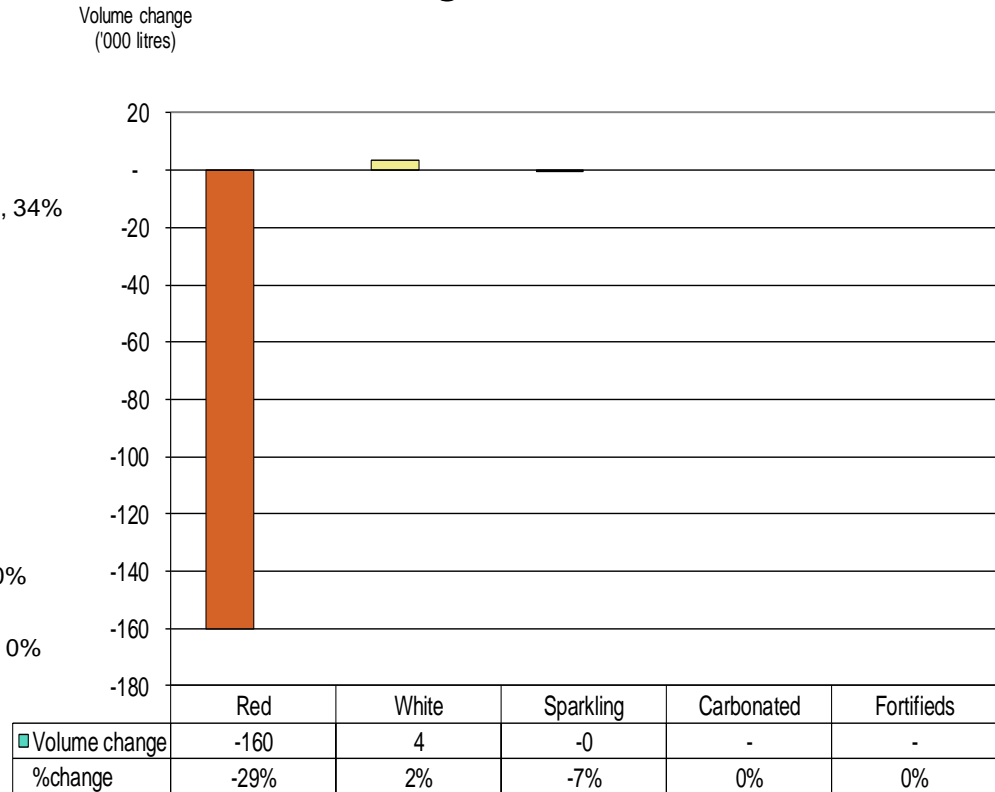
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10 to \$19.99		Above \$20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
China, Pr	-	++	38.2	17%	57.1	-46%	29.0	-19%	88.1	-21%	31.7	70%	244.1	-20%
Hong Kong	-	na	-	na	1.5	-38%	3.8	12%	3.4	-43%	0.7	33%	9.4	-23%
Canada	-	na	0.6	20%	3.6	-32%	2.4	21%	14.3	105%	0.4	-2%	21.3	40%
Singapore	-	na	-	-100%	0.0	-73%	1.7	-47%	12.5	-32%	1.2	-29%	15.4	-34%
United Kingdom	-	na	-	na	42.3	-39%	16.3	-26%	12.2	8%	2.2	105%	73.0	-30%
United States Of America	-	na	-	na	4.4	-53%	1.4	-54%	3.1	-63%	0.1	-84%	9.1	-58%
Malaysia	-	na	-	na	3.8	-36%	1.1	-74%	3.8	-6%	0.8	-34%	9.6	-39%
Denmark	-	na	-	++	3.8	-31%	3.3	-29%	2.1	-51%	0.2	4%	9.4	-36%
Finland	-	na	-	na	-	-100%	91.3	-8%	13.2	na	-	na	104.5	-7%
Belgium	-	na	-	na	-	na	-	na	7.1	na	0.3	na	7.5	na
Japan	-	na	-	na	4.0	-50%	2.7	38%	18.4	40%	0.4	-31%	25.5	8%
Ship	-	-100%	19.5	na	4.7	++	-	na	2.9	-66%	0.0	-83%	27.1	209%
Sri Lanka	-	na	-	na	-	na	3.7	na	3.2	na	-	na	6.8	na
Ireland	-	na	-	na	3.0	51%	0.7	na	0.1	++	0.1	na	4.0	98%
Vietnam	-	na	0.4	186%	0.3	na	0.9	0%	1.1	7%	-	na	2.6	29%
Other	-	na	0.4	-83%	1.2	-98%	8.9	-60%	5.2	-16%	1.0	-63%	16.8	-80%
Total	-	-100%	59.1	65%	129.7	-53%	167.4	-18%	190.8	-5%	39.1	41%	586.0	-21%

Packaged exports by colour/wine style

Volume ('000 litres)

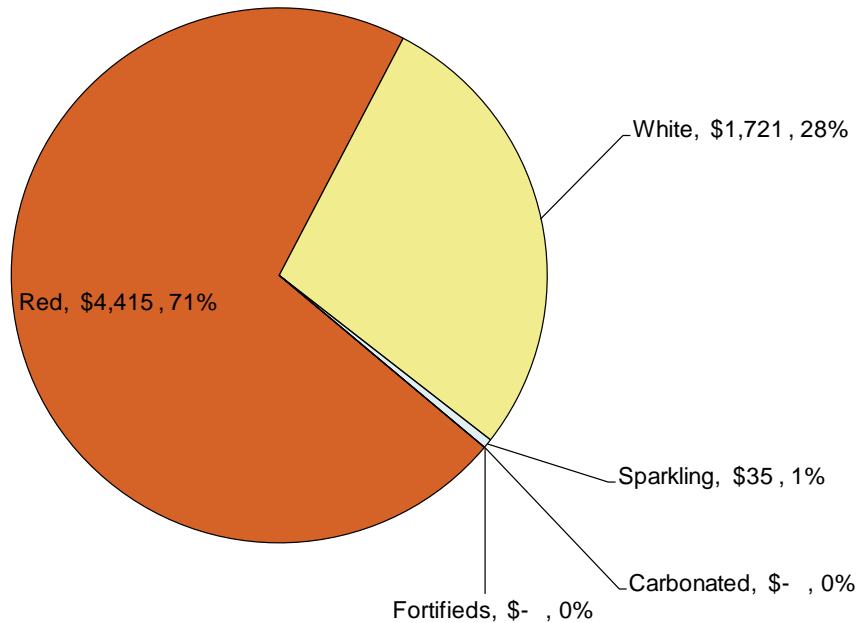


Change in volume

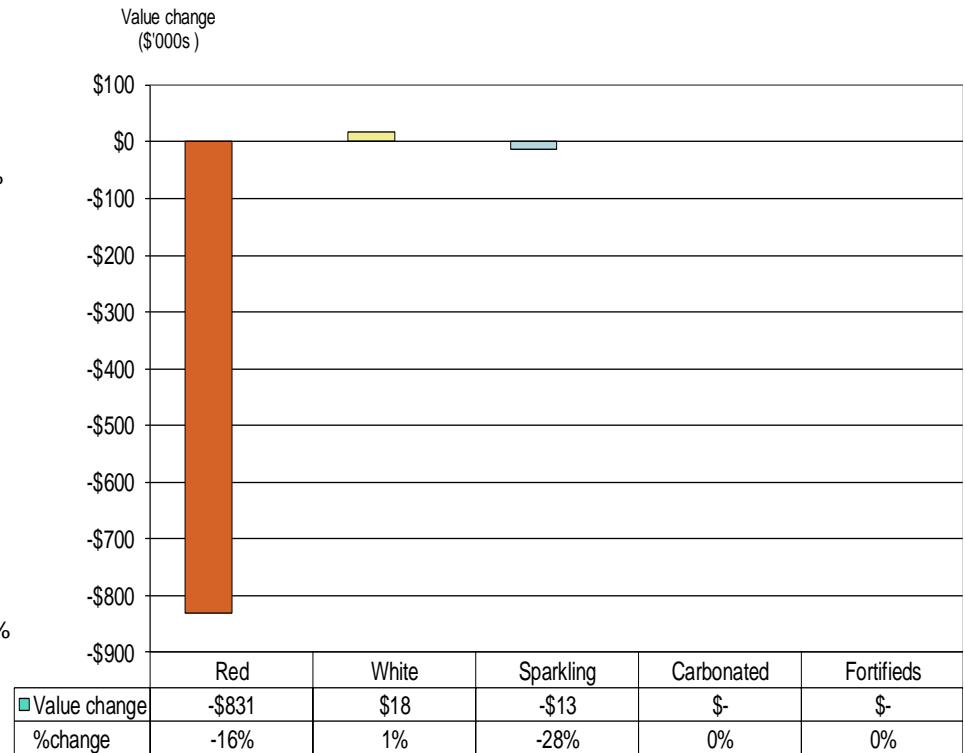


Packaged exports by colour/wine style

Value ('000 AUD)



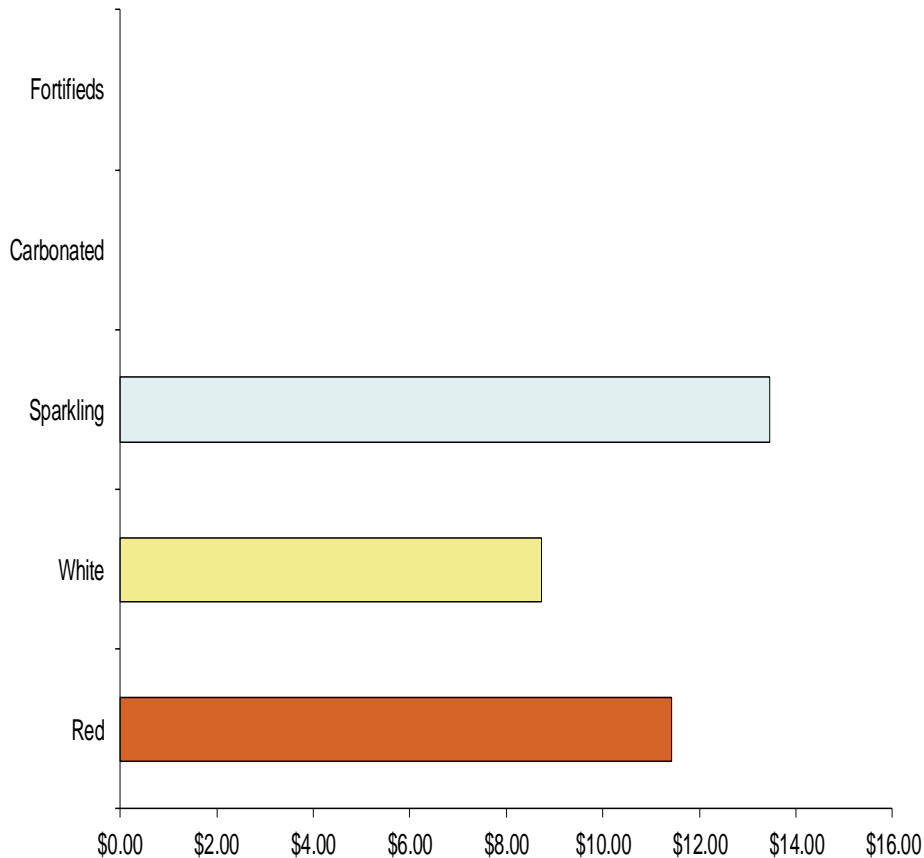
Change in value



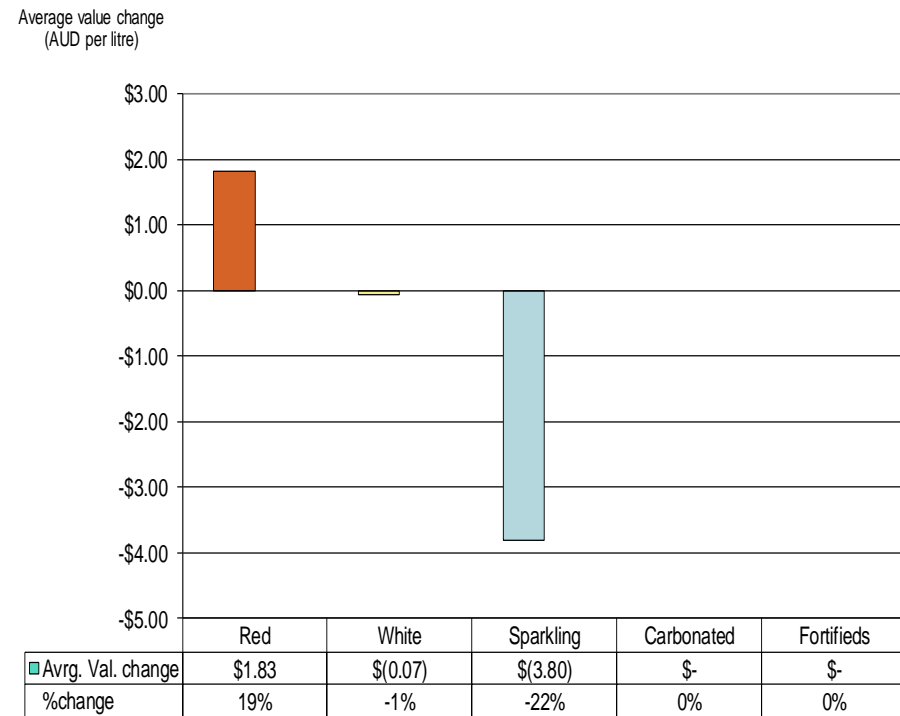
	Red	White	Sparkling	Carbonated	Fortifieds
Value change	-\$831	\$18	-\$13	\$-	\$-
%change	-16%	1%	-28%	0%	0%

Packaged exports by colour/wine style

Average value (AUD per litre)

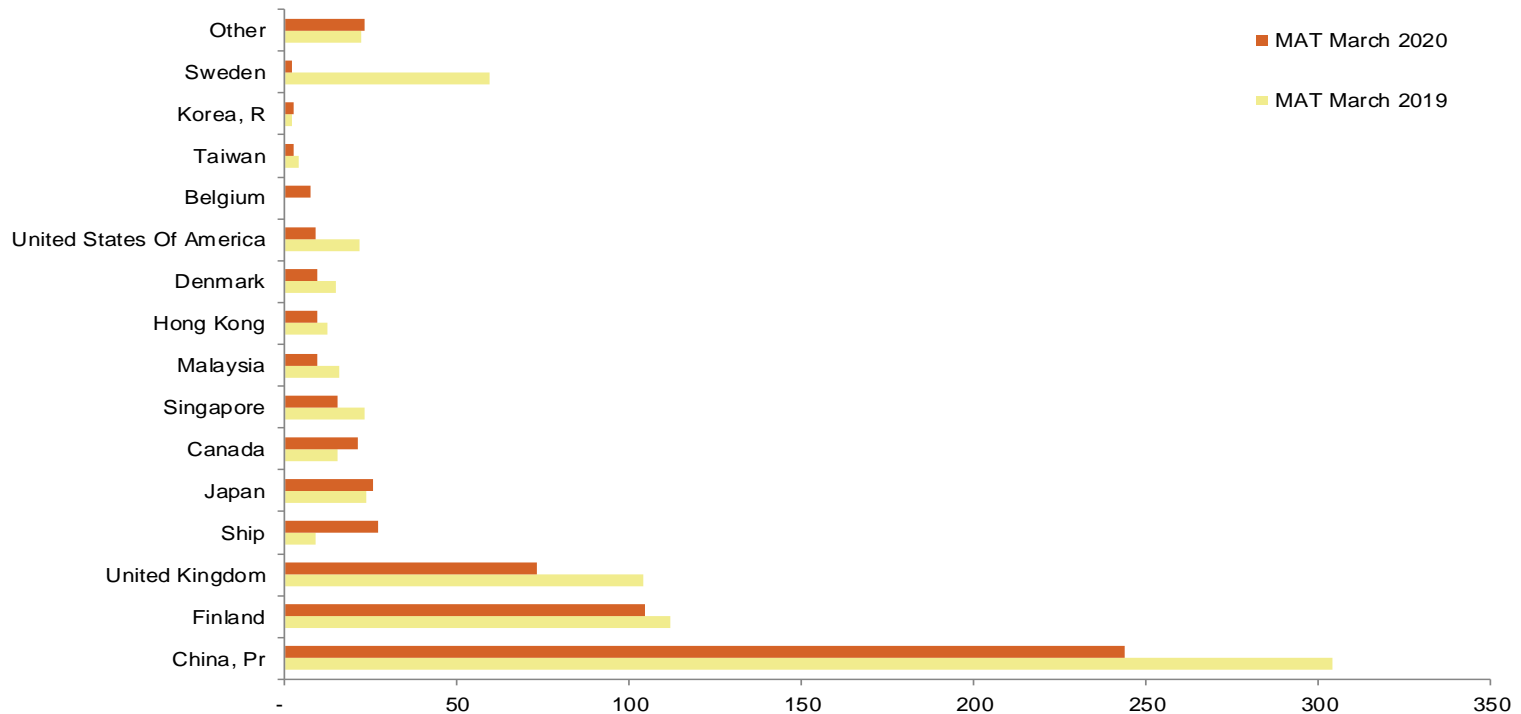


Change in average value



Packaged exports by top 15 destinations

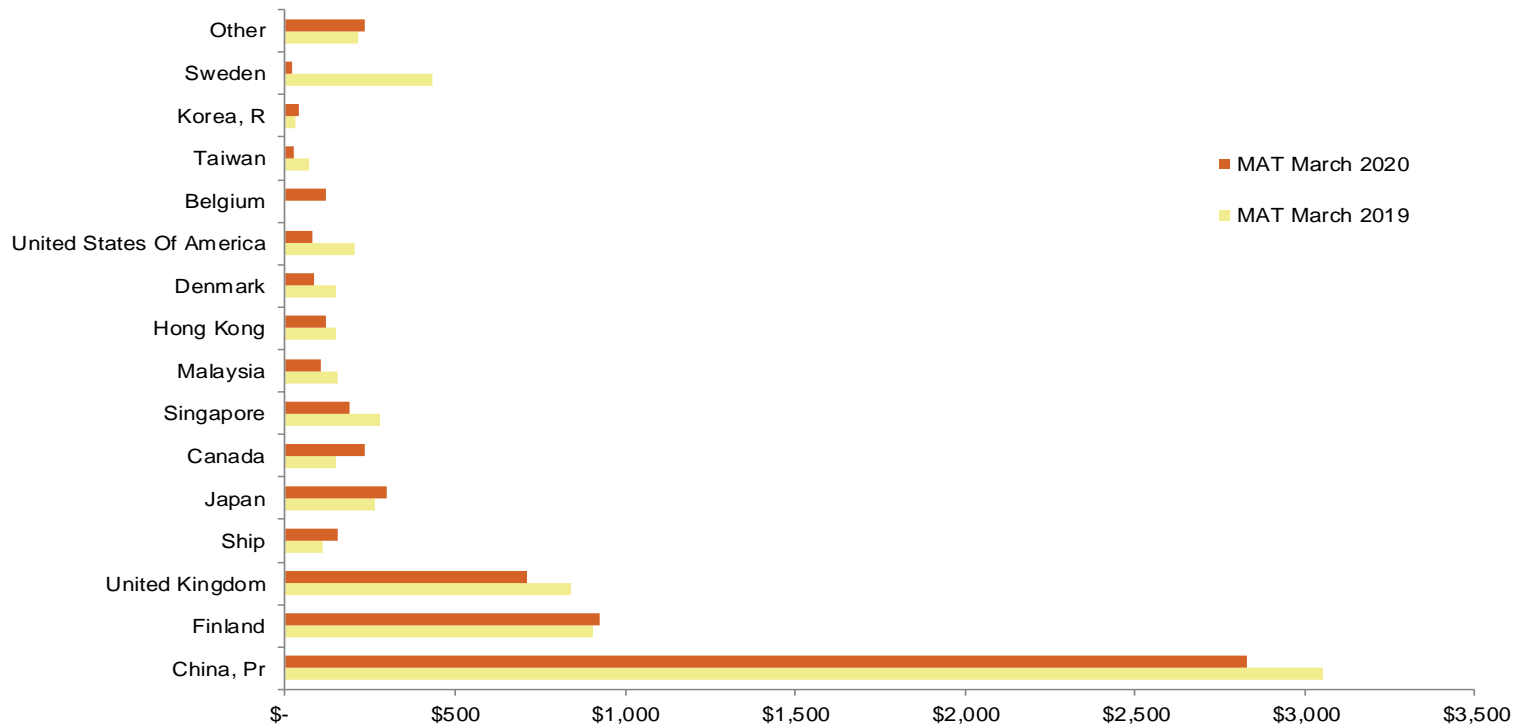
Volume ('000 litres)



	China, Pr	Finland	United Kingdom	Ship	Japan	Canada	Singapore	Malaysia	Hong Kong	Denmark	United States Of America	Belgium	Taiwan	Korea, R	Sweden	Other
■ MAT March 2020	244	105	73	27	25	21	15	10	9	9	9	7	2	2	2	23
■ MAT March 2019	304	112	104	9	24	15	23	16	12	15	22	-	4	2	60	22

Packaged exports by top 15 destinations

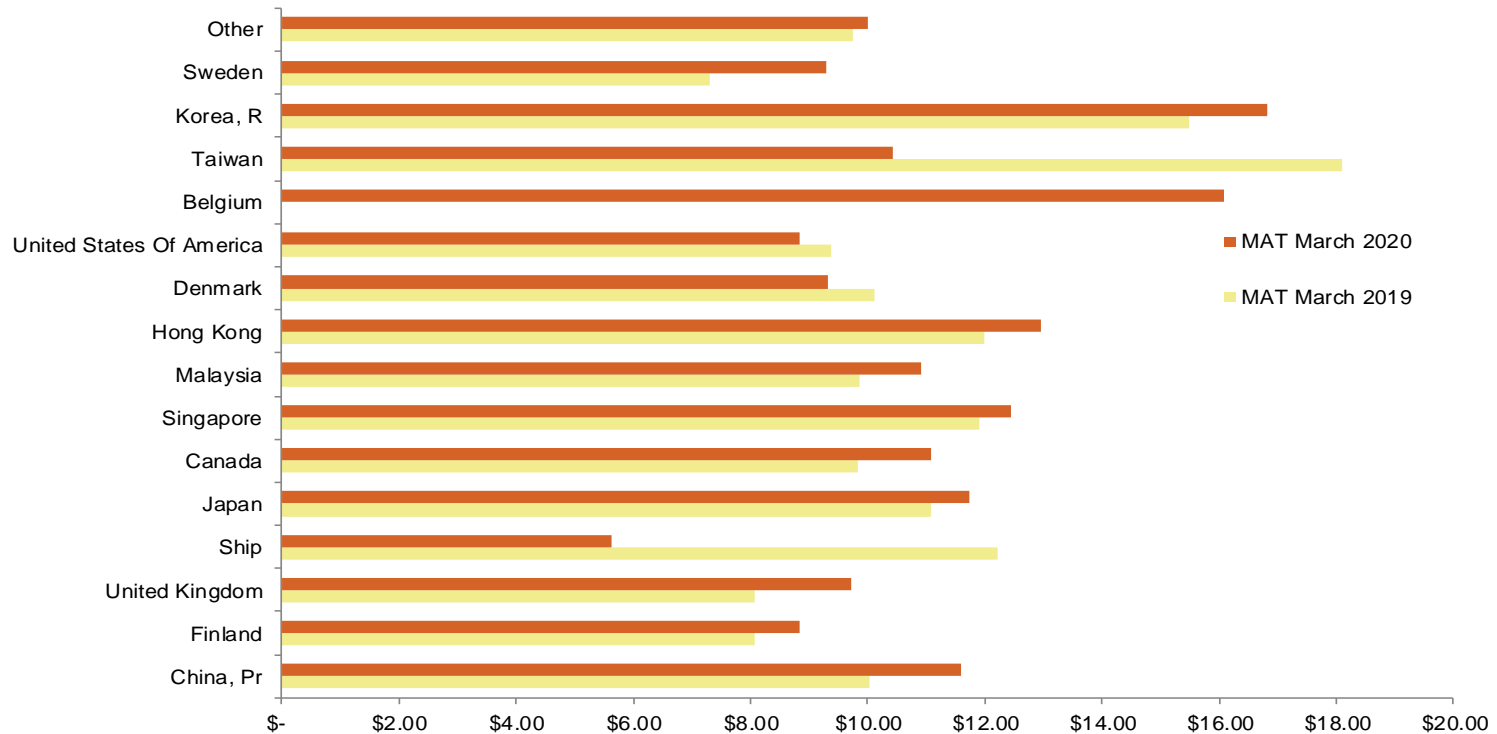
Value ('000 AUD)



	China, Pr	Finland	United Kingdom	Ship	Japan	Canada	Singapore	Malaysia	Hong Kong	Denmark	United States Of America	Belgium	Taiwan	Korea, R	Sweden	Other
■ MAT March 2020	\$2,828	\$924	\$709	\$153	\$299	\$236	\$191	\$104	\$122	\$87	\$80	\$120	\$25	\$39	\$20	\$233
■ MAT March 2019	\$3,053	\$906	\$841	\$107	\$262	\$149	\$277	\$154	\$148	\$148	\$202	\$-	\$69	\$29	\$435	\$216

Packaged exports by top 15 destinations

Average Value (AUD per litre)

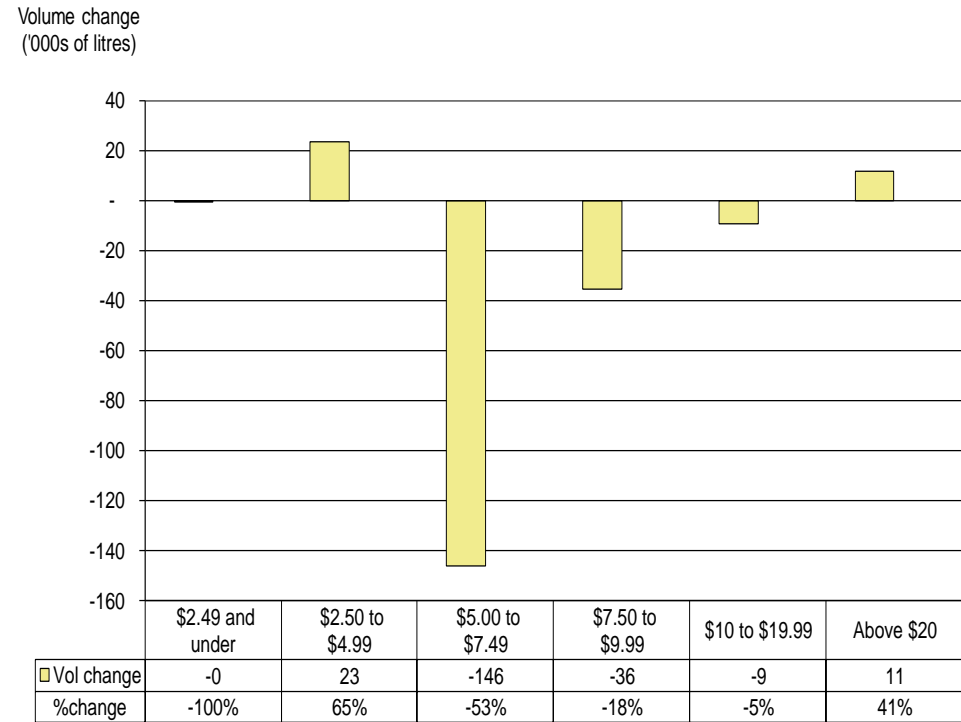
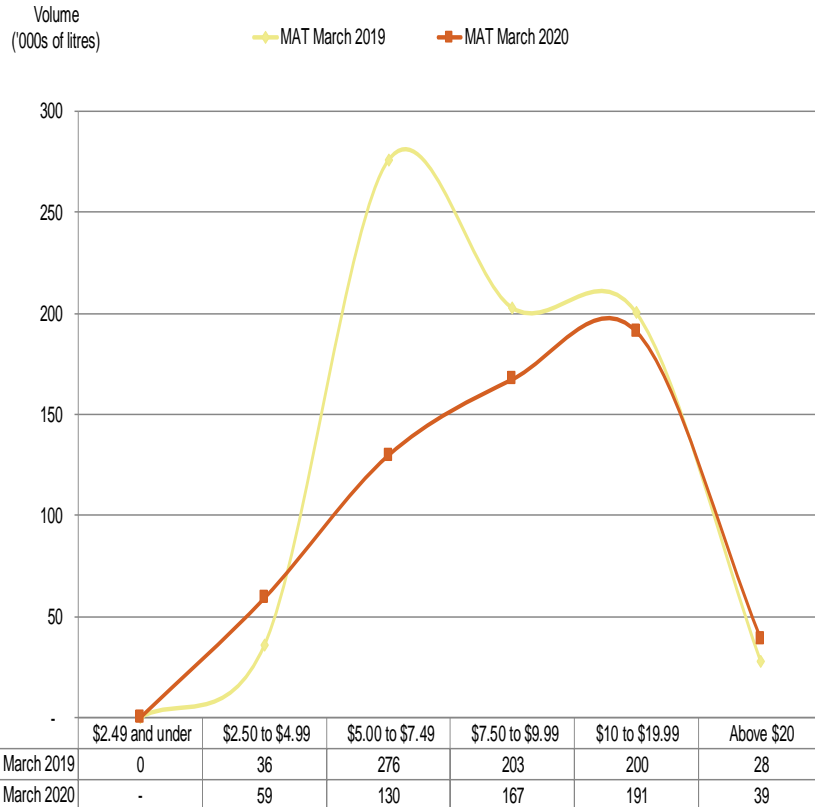


	China, Pr	Finland	United Kingdom	Ship	Japan	Canada	Singapore	Malaysia	Hong Kong	Denmark	United States Of America	Belgium	Taiwan	Korea, R	Sweden	Other
MAT March 2020	\$11.58	\$8.84	\$9.71	\$5.62	\$11.73	\$11.07	\$12.45	\$10.91	\$12.95	\$9.32	\$8.84	\$16.08	\$10.42	\$16.82	\$9.30	\$9.99
MAT March 2019	\$10.04	\$8.08	\$8.08	\$12.22	\$11.07	\$9.85	\$11.90	\$9.87	\$12.00	\$10.12	\$9.39	\$-	\$18.11	\$15.48	\$7.30	\$9.74

Packaged exports by price point

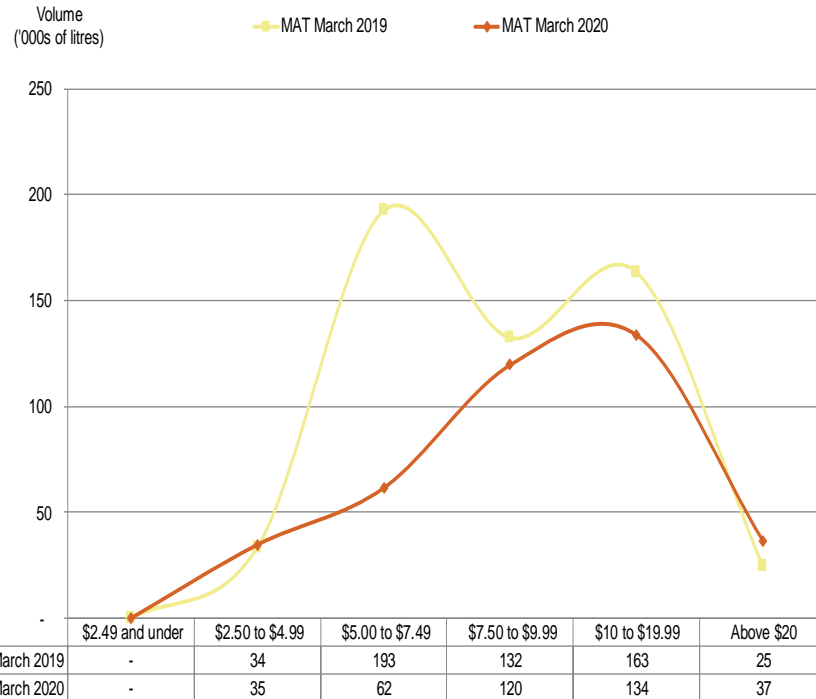
Volume ('000 litres)

Change in volume

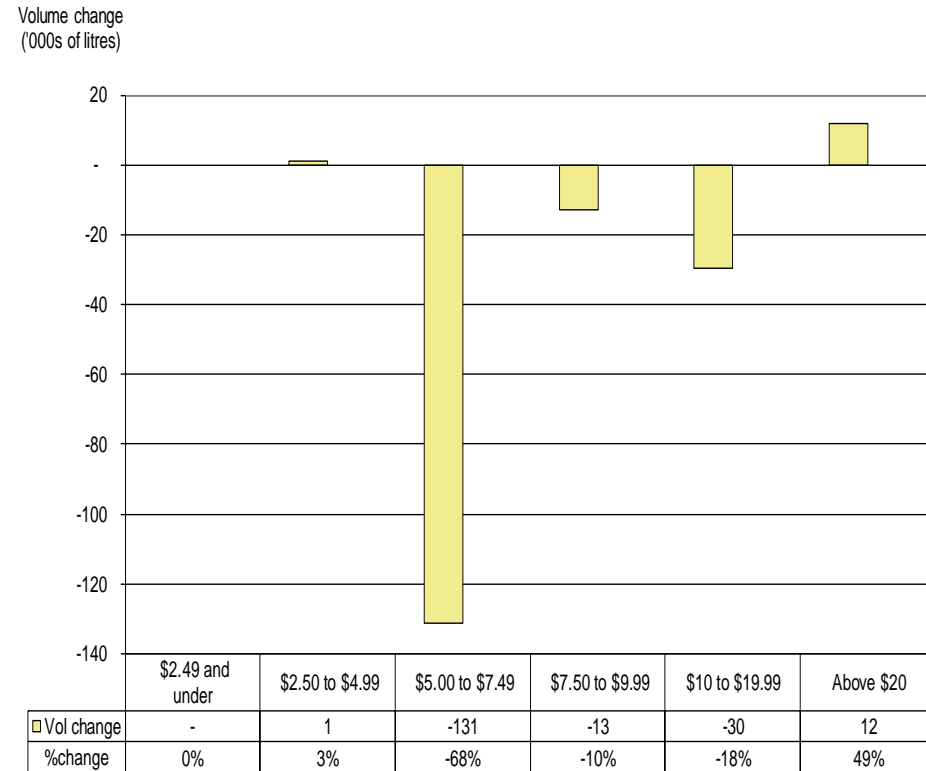


Packaged red wine exports by price point

Volume ('000 litres)

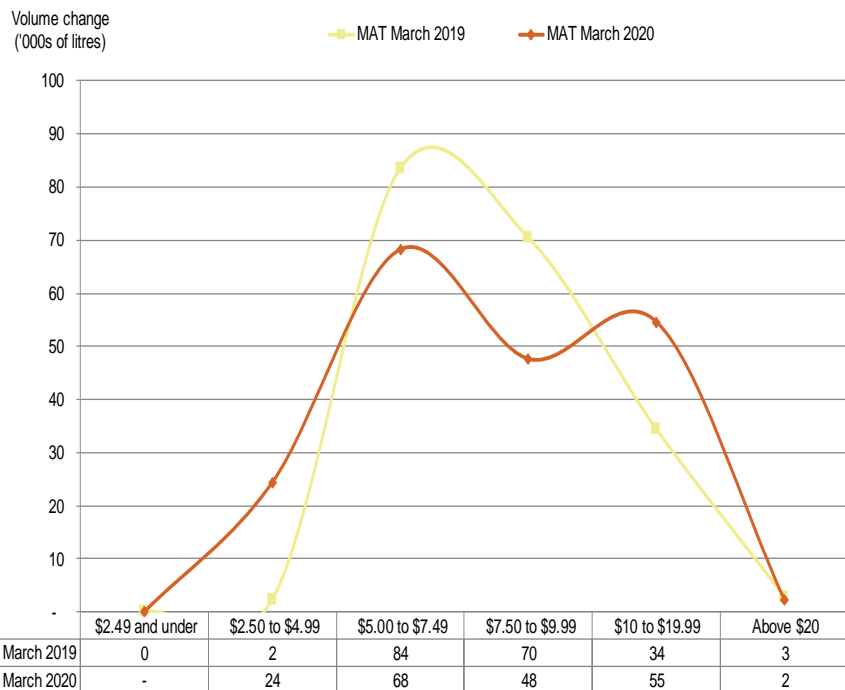


Change in volume

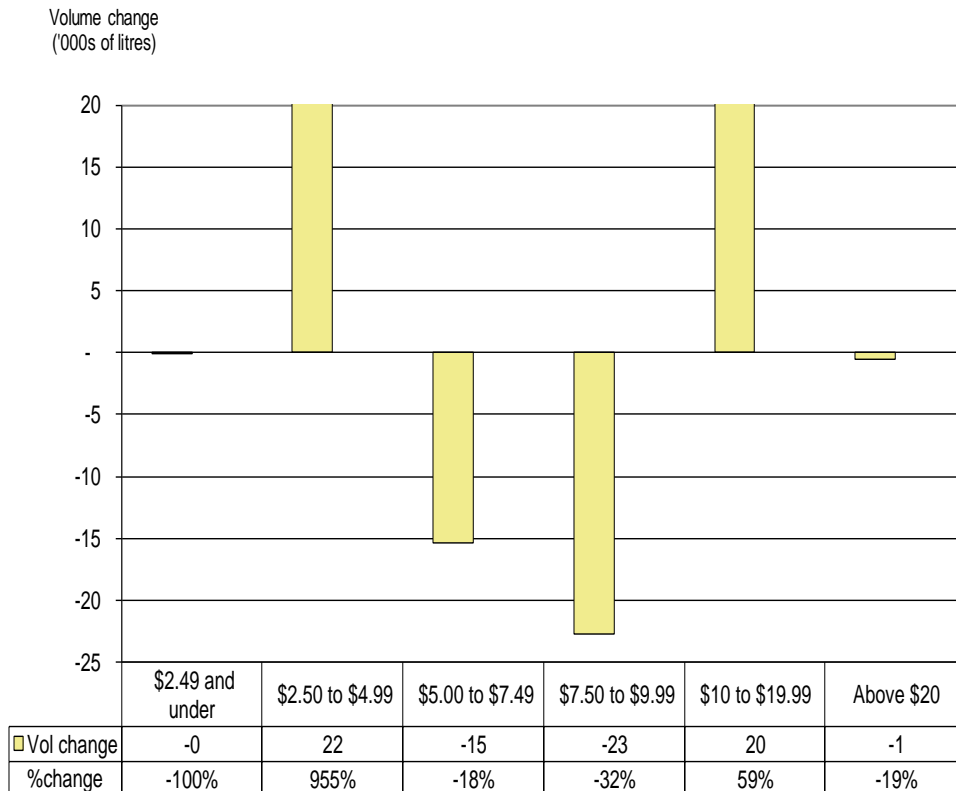


Packaged white wine exports by price point

Volume ('000 litres)



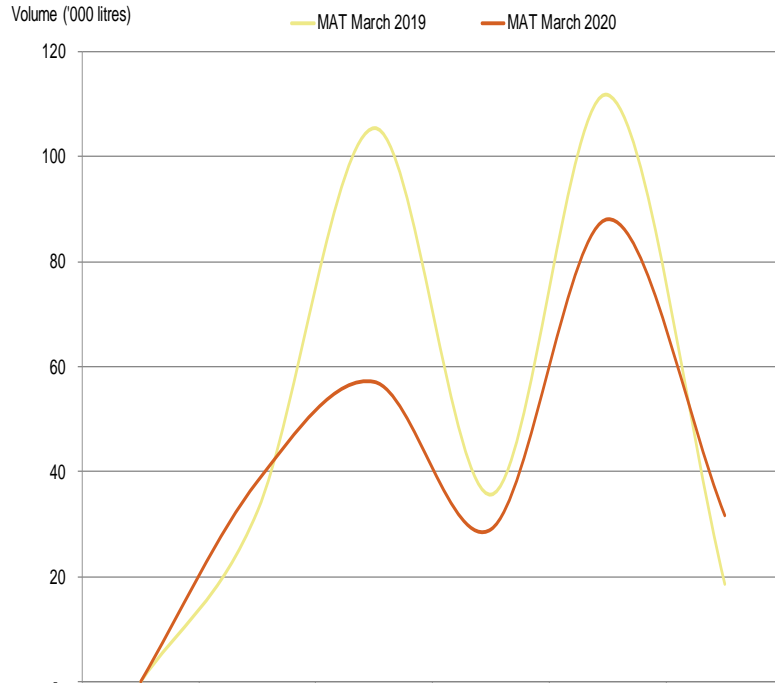
Change in volume



Packaged wine exports to China, Pr

Overview

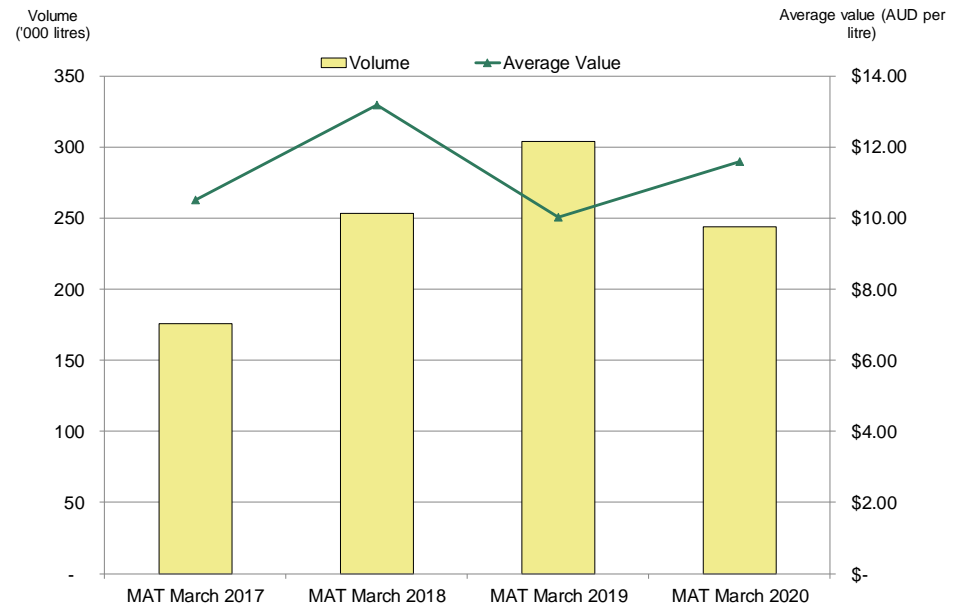
Total wine by price point



	\$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 March 2019	-	32,522	105,521	35,667	111,839	18,621
MAT March 2020	-	38,185	57,114	29,043	88,115	31,685

		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	278,451	214,083	-23%
	Value (AUD)	\$2,766,833	\$2,574,956	-7%
	Average value	\$9.94	\$12.03	21%
White wine	Volume (litres)	24,809	27,727	12%
	Value (AUD)	\$263,532	\$220,980	-16%
	Average value	\$10.62	\$7.97	-25%
Total wine	Volume (litres)	304,169	244,141	-20%
	Value (AUD)	3,053,401	2,828,167	-7%
	Average value	\$10.04	\$11.58	15%

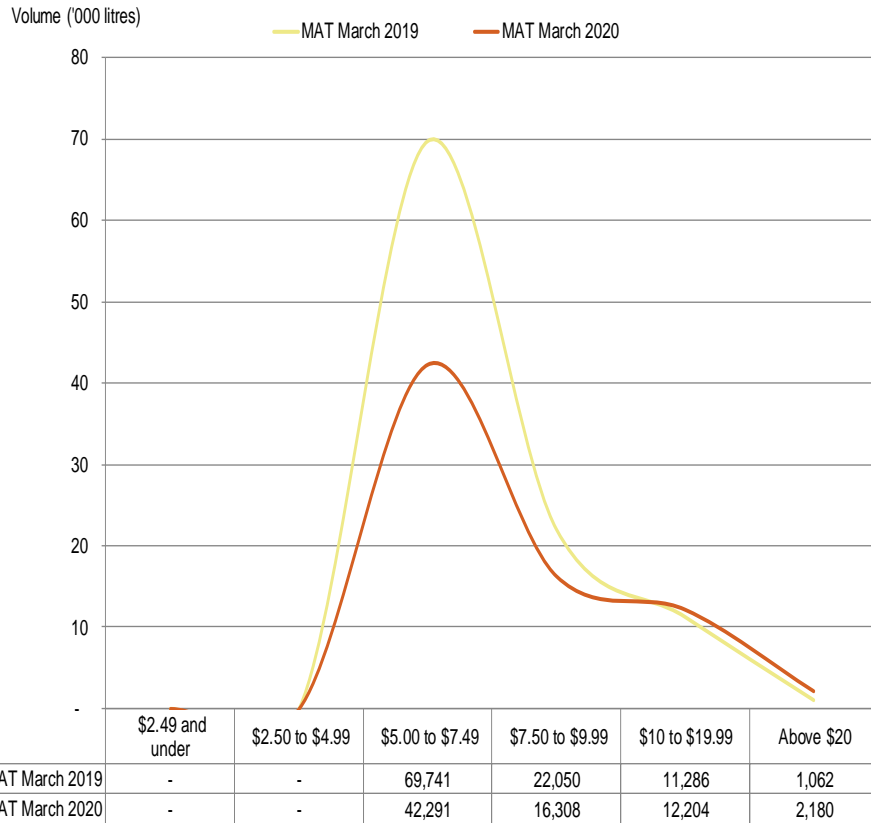
Total volume and average value



Packaged wine exports to United Kingdom

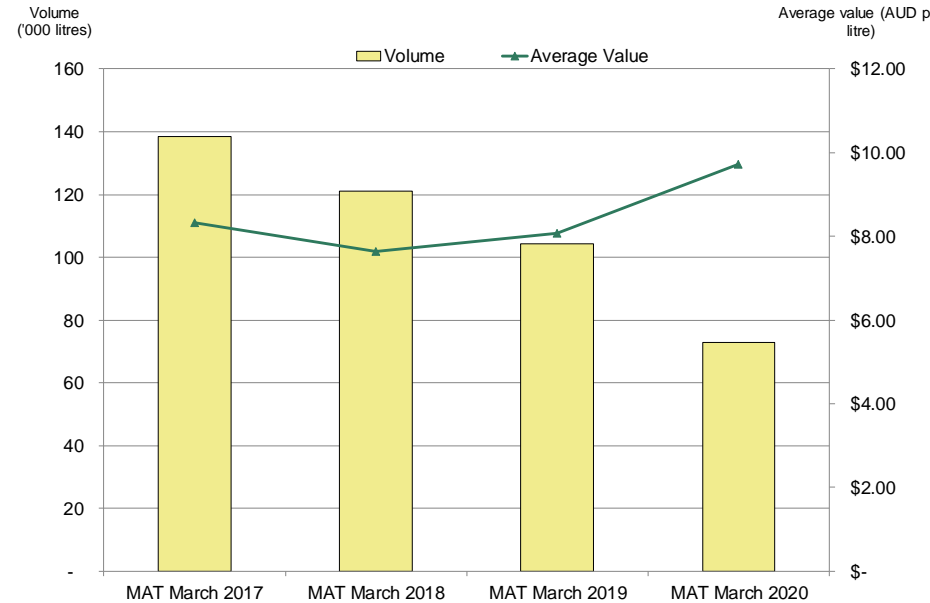
Overview

Total wine by price point



		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	34,227	25,324	-26%
	Value (AUD)	\$313,348	\$336,460	7%
	Average value	\$9.15	\$13.29	45%
White wine	Volume (litres)	69,894	47,660	-32%
	Value (AUD)	\$527,230	\$372,512	-29%
	Average value	\$7.54	\$7.82	4%
Total wine	Volume (litres)	104,139	72,983	-30%
	Value (AUD)	\$840,996	\$708,971	-16%
	Average value	\$8.08	\$9.71	20%

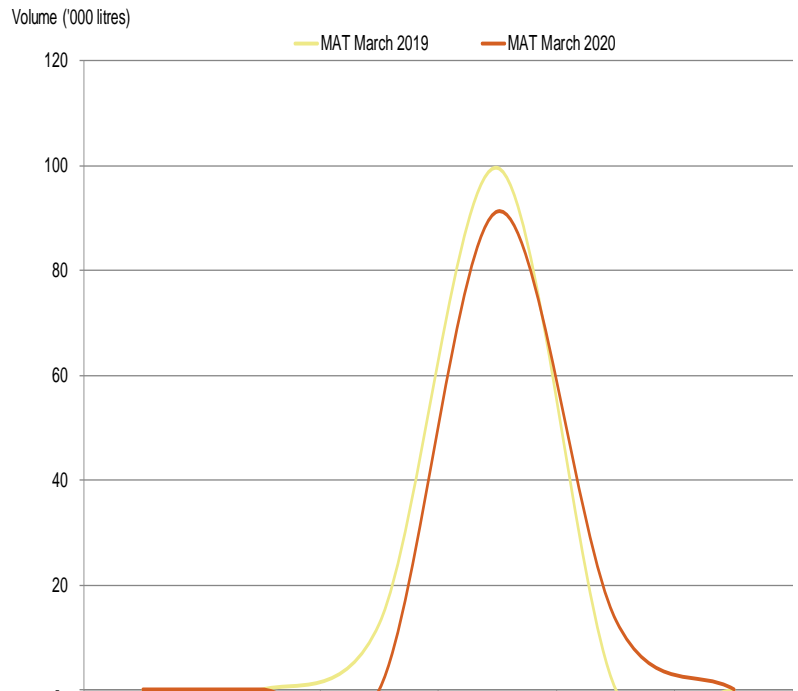
Total volume and average value



Packaged wine exports to Finland

Overview

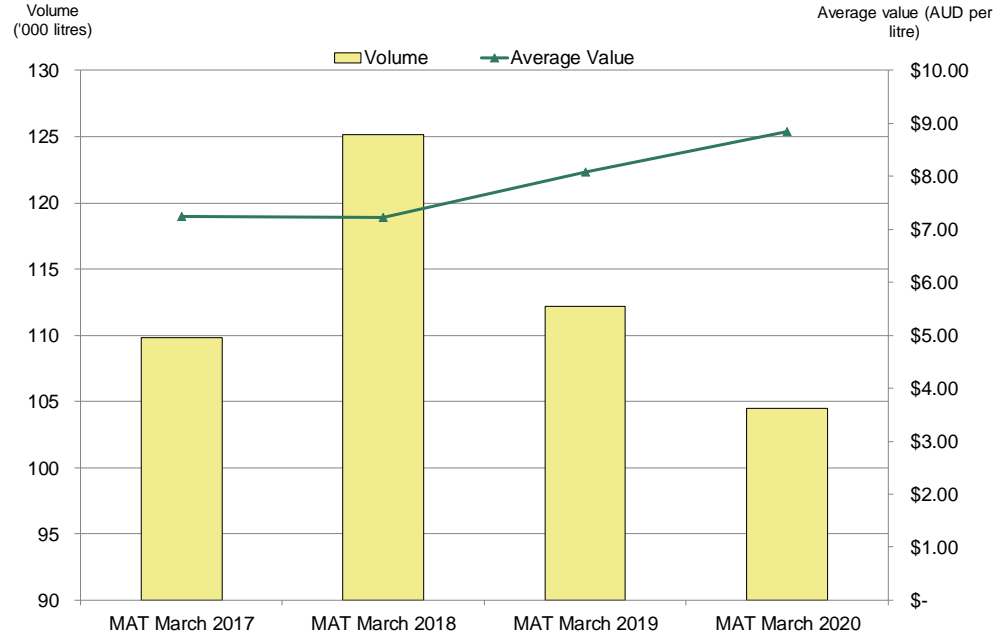
Total wine by price point



	\$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 March 2019	-	-	12,645	99,513	-	-
MAT March 2020	-	-	-	91,296	13,212	-

		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	75,213	61,488	-18%
	Value (AUD)	\$600,097	\$527,992	-12%
	Average value	\$7.98	\$8.59	8%
White wine	Volume (litres)	36,945	43,020	16%
	Value (AUD)	\$305,950	\$396,128	29%
	Average value	\$8.28	\$9.21	11%
Total wine	Volume (litres)	112,158	104,508	-7%
	Value (AUD)	\$906,047	\$924,121	2%
	Average value	\$8.08	\$8.84	9%

Total volume and average value

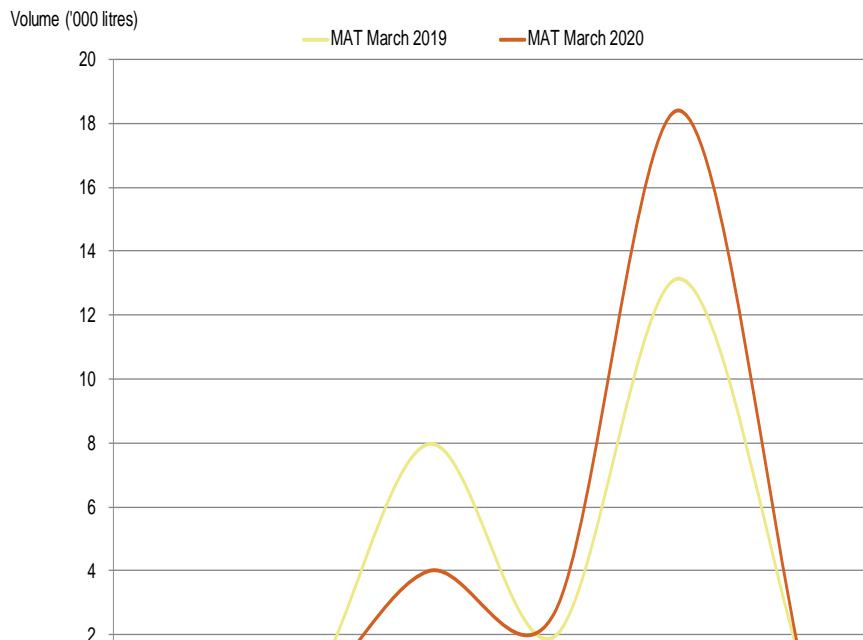


Packaged wine exports to Japan

Overview

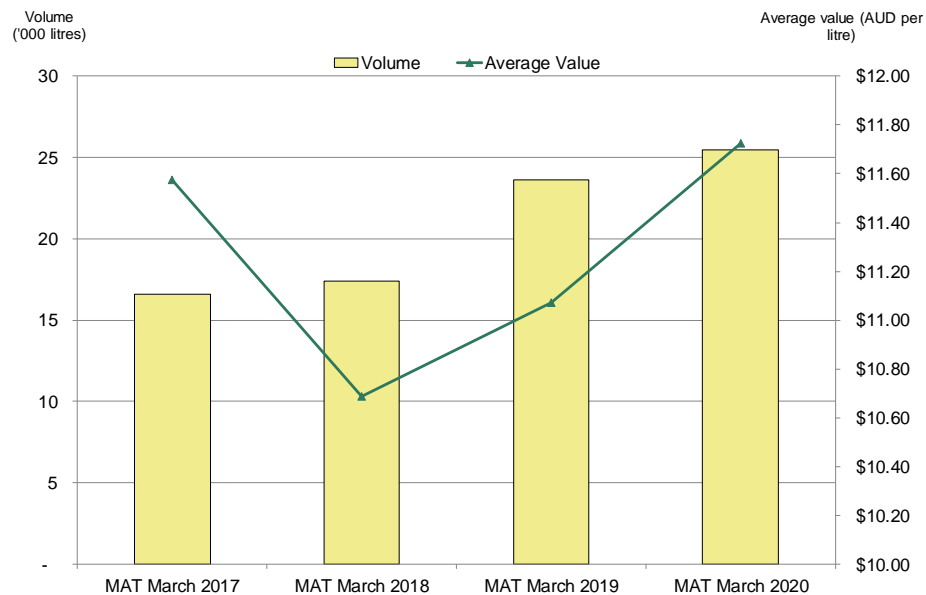
		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	10,413	6,917	-34%
	Value (AUD)	\$130,294	\$79,705	-39%
	Average value	\$13	\$12	-8%
White wine	Volume (litres)	11,340	18,554	64%
	Value (AUD)	\$106,249	\$218,953	106%
	Average value	\$9.37	\$11.80	26%
Total wine	Volume (litres)	23,625	25,470	8%
	Value (AUD)	\$261,567	\$298,658	14%
	Average value	\$11.07	\$11.73	6%

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 March 2019	-	-	7,965	1,926	13,149	585
MAT March 2020	-	-	3,987	2,664	18,414	405

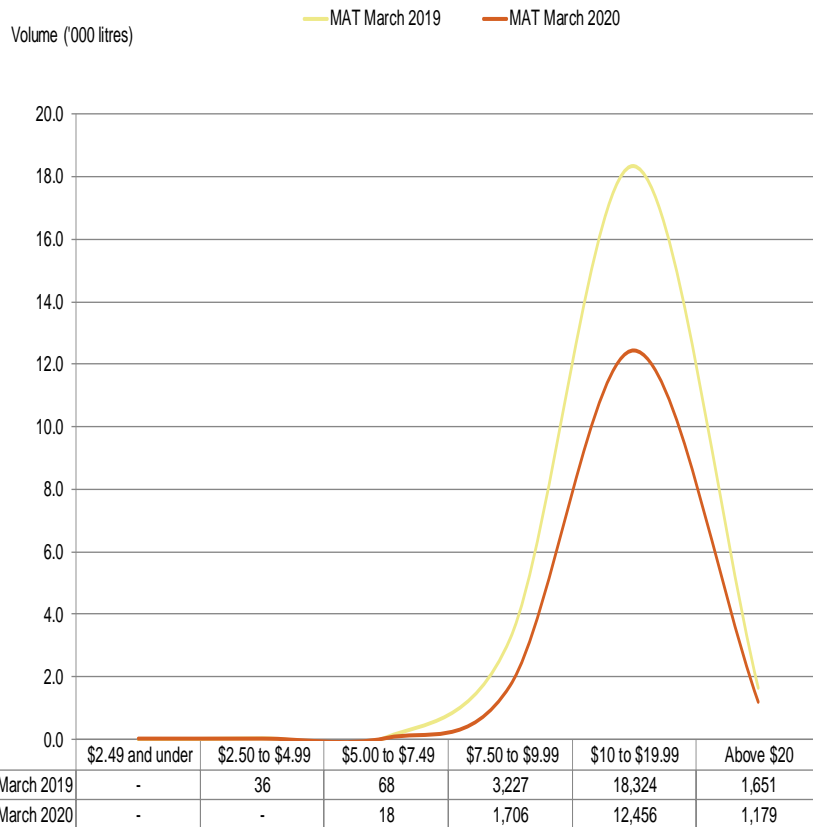
Total volume and average value



Packaged wine exports to Singapore

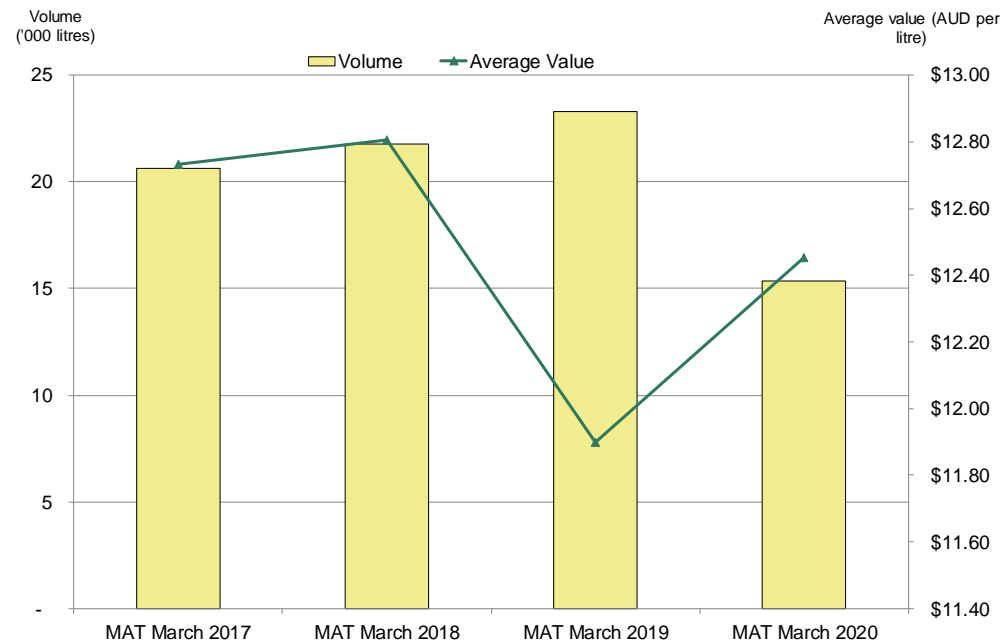
Overview

Total wine by price point



		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	18,671	13,046	-30%
	Value (AUD)	\$222,129	\$159,182	-28%
	Average value	\$11.90	\$12.20	3%
White wine	Volume (litres)	4,621	2,097	-55%
	Value (AUD)	\$55,080	\$29,774	-46%
	Average value	\$11.92	\$14.20	19%
Total wine	Volume (litres)	23,305	15,359	-34%
	Value (AUD)	\$277,284	\$191,260	-31%
	Average value	\$11.90	\$12.45	5%

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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