

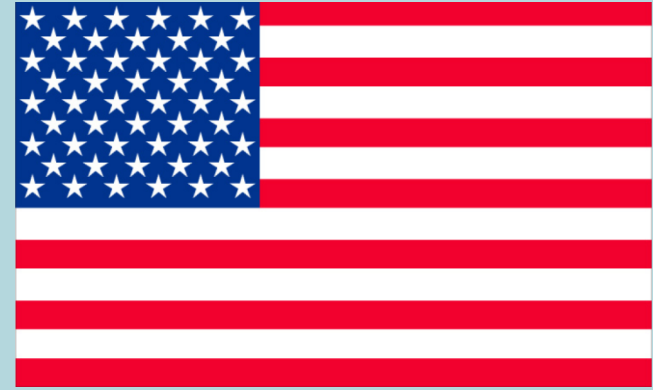
Wine Australia

Providing Insights for  
Australian Wine



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# United States off-trade still wine sales trend report

**Year ended March 2018**

Source: Information Resources Incorporated

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## Important context for reading this report

- This report covers the year- and quarter-ended December 2017.
- IRI advises that while every US state has a Liquor channel, it accounts for a low share of most states. Nevertheless, 12 states are solely supplied by the Liquor channel. These 12 states account for around 21% of the US market and Wine Australia has purchased data for the biggest three - New York metro, Massachusetts and New Jersey – which in turn, account for around three quarters of the Liquor-only states (therefore roughly 16% of the US market). In addition, the Liquor channel represents a large share of the off-trade sales in Georgia, Texas and Colorado and Liquor channel sales for these states have also been purchased.

## US Off-trade Wine Sales – Summary

	Australian Wine Sales						Total Wine Sales			
	Volume			Value			Volume		Value	
	<i>million cases</i>	<i>annual growth</i>	<i>market share</i>	<i>million USD</i>	<i>annual growth</i>	<i>market share</i>	<i>million cases</i>	<i>annual growth</i>	<i>million USD</i>	<i>annual growth</i>
California - Food	0.26	-4.5%	1.7%	\$20	3.9%	1.2%	15.86	-1.8%	\$1,658	2.2%
Colorado - Liquor	0.23	-9.9%	4.0%	\$20	-7.2%	3.0%	5.73	-5.4%	\$661	-3.2%
Georgia - Liquor	0.16	-0.1%	5.8%	\$11	0.0%	3.3%	2.81	-0.2%	\$342	1.3%
Great Lakes - IRI Standard - Food/Drug	0.76	1.3%	4.5%	\$57	3.9%	4.2%	16.70	0.3%	\$1,372	3.0%
Massachusetts - Liquor	0.45	-7.8%	5.2%	\$36	-7.7%	3.9%	8.59	1.3%	\$930	4.6%
Mid-South - IRI Standard - Food	0.62	7.7%	5.3%	\$46	8.6%	4.3%	11.81	4.4%	\$1,069	5.0%
New Jersey - Liquor	0.52	-0.2%	4.8%	\$45	-0.3%	3.6%	10.70	-1.7%	\$1,221	0.0%
New York Metro, NY - Liquor	0.62	-5.3%	5.6%	\$47	-2.8%	3.5%	11.15	-2.1%	\$1,346	-1.1%
Northeast - IRI Standard - Food	0.24	12.1%	5.6%	\$19	18.6%	4.7%	4.25	13.6%	\$398	19.7%
Plains - IRI Standard - Food	0.17	7.2%	5.2%	\$13	9.4%	4.5%	3.27	0.4%	\$283	1.8%
South Central - IRI Standard - Food	0.27	-2.1%	4.9%	\$19	1.1%	3.7%	5.48	-0.2%	\$511	2.5%
Southeast - IRI Standard - Food	1.11	-0.2%	6.6%	\$75	2.7%	5.0%	16.86	2.9%	\$1,505	4.9%
Texas-RMA - Liquor	0.01	-18.3%	2.3%	\$1	-13.5%	1.6%	0.28	-7.5%	\$40	-1.4%
Total US - Conv	0.62	6.0%	5.4%	\$54	7.3%	5.2%	11.50	4.3%	\$1,030	5.6%
Total US - Drug	0.37	-7.9%	3.6%	\$25	-4.0%	3.8%	10.20	-3.6%	\$671	-0.4%
Total US - Food	3.85	1.5%	4.5%	\$277	4.5%	3.6%	84.72	1.2%	\$7,784	3.5%
West - IRI Standard - Food	0.49	-2.3%	3.9%	\$33	-1.8%	3.0%	12.33	-1.6%	\$1,110	-0.8%
<b>Total USA Off-Trade</b>	<b>6.83</b>	<b>-0.6%</b>	<b>4.7%</b>	<b>\$516</b>	<b>1.7%</b>	<b>3.7%</b>	<b>145.70</b>	<b>0.3%</b>	<b>\$14,024</b>	<b>2.3%</b>

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## Total US Off-Trade Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	6.8	-1%	4.7%	145.7	0.3%
Value (million USD)	516	2%	3.7%	14,024	2.3%
Average price (USD/bottle equ.)	6.3	2.3%	na	8.0	2.0%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	1.7	5%	5.2%	32.4	1.2%
Value (million USD)	127	8%	4.1%	3,107	4.2%
Average price (USD/bottle equ.)	6.3	2.9%	na	8.0	2.9%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	3.93	0%	58%	6%	63.99	-1%	44%
Rosé	0.103	3%	2%	1%	11.92	7%	8%
White	2.730	-1%	40%	4%	60.71	-1%	42%
Sparkling	0.065	0%	1%	1%	9.02	4%	6%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.001	26%	0.0%	0.0%	14.84	-7%	13%
Popular \$4.00 - \$7.99	5.914	-6%	87.8%	13.1%	45.23	-3%	41%
Premium \$8.00 - \$10.99	0.652	111%	9.7%	2.4%	27.03	2%	24%
Super Premium \$11.00 - \$14.99	0.114	-11%	1.7%	0.7%	15.74	7%	14%
Ultra Premium \$15.00 - \$19.99	0.021	-8%	0.3%	0.4%	5.75	9%	5%
Luxury \$20.00 - \$24.99	0.020	31%	0.3%	1.0%	1.93	11%	2%
Super Luxury \$25.00 Plus	0.013	-5%	0.2%	1.1%	1.16	5%	1%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	3.39	3%	50%	5%	71.72	1%	49%
Bottle (1.5L)	3.34	-4%	49%	11%	31.01	-3%	21%
Soft-pack	0.00	-33%	0%	0%	22.35	1%	15%
Can	0.02	-42%	0%	7%	0.37	25%	0%
Other	0.00	DNE	0.0%	0.0%	11.22	0%	8%

### NOTES & DEFINITIONS

Prepared: May 2018  
Source: Information Resources Incorporated, X-Rates

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### Varietal

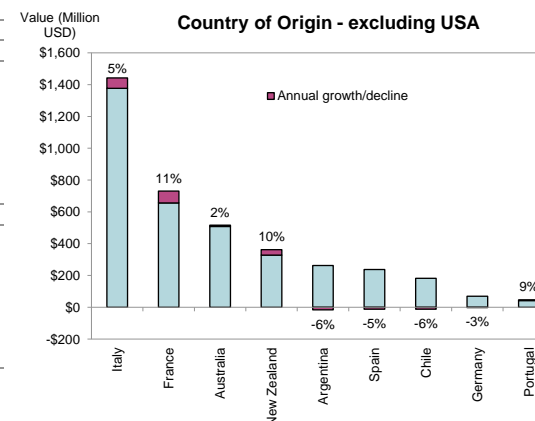
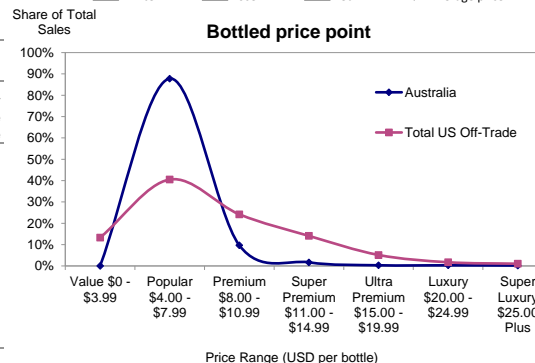
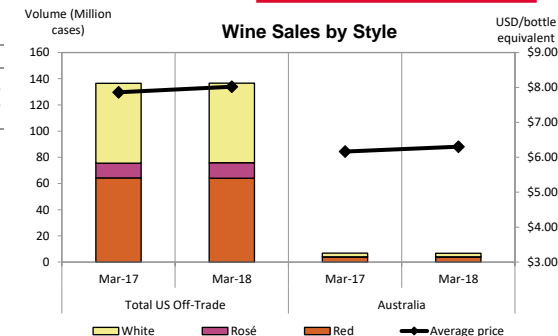
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	5.1	1%	4%	126.8	8%
Cabernet Sauvignon	83.5	9%	4%	2,210.2	4%
Chardonnay	100.0	0%	4%	2,317.8	0%
Fume/Sauvignon Blanc	10.2	-4%	1%	846.0	6%
Malbec	0.0	-24%	0%	252.9	-6%
Merlot	47.9	-9%	7%	653.5	-6%
Pinot Grigio/Pinot Gris	44.2	2%	4%	1,185.3	1%
Pinot Noir	15.0	-10%	2%	986.4	3%
Riesling	5.9	-19%	3%	211.2	-3%
Syrah/Shiraz	61.8	-8%	61%	101.8	-7%
White Zinfandel	1.5	-4%	1%	242.6	-6%
Zinfandel	0.0	-37%	0%	196.5	-4%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	10,071.5	2%	72%	113.2	0%	78%
Italy	1,442.6	5%	10%	11.6	3%	8%
France	730.3	11%	5%	3.4	12%	2%
Australia	516.3	2%	4%	6.8	-1%	5%
New Zealand	362.4	10%	3%	2.4	10%	2%
Argentina	262.6	-6%	2%	2.0	-6%	1%
Spain	237.2	-5%	2%	2.0	-6%	1%
Chile	182.5	-6%	1%	2.4	-4%	2%
Germany	68.9	-3%	0%	0.6	-3%	0%
Portugal	46.3	9%	0%	0.5	6%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
<b>Total Market</b>						
Value \$0 - \$3.99	1,784.1	-2%	2,869	-7%	33.7	-25%
Popular \$4.00 - \$7.99	5,522.1	-4%	8,732	-3%	650.3	-14%
Premium \$8.00 - \$10.99	4,343.4	4%	3,760	-2%	131.7	21%
Super Premium \$11.00 - \$14.99	2,931.2	8%	3,609	5%	111.4	-9%
Ultra Premium \$15.00 - \$19.99	1,154.1	12%	1,279	5%	34.6	16%
Luxury \$20.00 - \$24.99	404.5	11%	254	3%	7.7	4%
Super Luxury \$25.00 Plus	288.2	-1%	268	5%	10.5	-8%
<b>Australia</b>						
Value \$0 - \$3.99	0.0	0%	1	10%	0.1	-75%
Popular \$4.00 - \$7.99	872.6	-4%	1,457	-1%	591.0	-13%
Premium \$8.00 - \$10.99	171.3	94%	31.2	499%	60.8	90%
Super Premium \$11.00 - \$14.99	5.2	-1%	6.2	-10%	48.7	-14%
Ultra Premium \$15.00 - \$19.99	2.1	8%	1.34	10%	9.9	-11%
Luxury \$20.00 - \$24.99	4.9	9%	0.06	-60%	1.7	-24%
Super Luxury \$25.00 Plus	1.5	5%	0.04	-48%	8.1	-4%



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## Total Food Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	3.8	2%	4.5%	84.7	1.2%
Value (million USD)	277	5%	3.6%	7,784	3.5%
Average price (USD/bottle equ.)	6.0	3.0%	na	7.7	2.2%

### Wine Sales - 12 Weeks to 1st of April 2018

	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	1.0	6%	5.1%	19.2	1.4%
Value (million USD)	71	9%	4.0%	1,775	4.1%
Average price (USD/bottle equ.)	6.1	3.1%	na	7.7	2.7%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	2.26	2%	59%	6%	37.84	0%	45%
Rosé	0.046	1%	1%	1%	6.68	9%	8%
White	1.509	1%	39%	4%	34.57	0%	41%
Sparkling	0.034	-5%	1%	1%	5.59	5%	7%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.001	45%	0.0%	0.0%	8.67	-6%	13%
Popular \$4.00 - \$7.99	3.313	-4%	87.0%	13.3%	24.88	-4%	39%
Premium \$8.00 - \$10.99	0.423	111%	11.1%	2.5%	17.21	3%	27%
Super Premium \$11.00 - \$14.99	0.051	-20%	1.3%	0.6%	8.85	9%	14%
Ultra Premium \$15.00 - \$19.99	0.005	11%	0.1%	0.2%	3.20	11%	5%
Luxury \$20.00 - \$24.99	0.010	44%	0.3%	1.2%	0.90	14%	1%
Super Luxury \$25.00 Plus	0.003	14%	0.1%	0.7%	0.49	11%	1%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	2.11	3%	55%	5%	43.95	1%	52%
Bottle (1.5L)	1.69	1%	44%	10%	16.37	-1%	19%
Soft-pack	0.00	-47%	0%	0%	13.76	3%	16%
Can	0.01	-58%	0%	3%	0.20	12%	0%
Other	0.00	DNE	0.0%	0.0%	4.85	-1%	6%

### NOTES & DEFINITIONS

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### Varietal

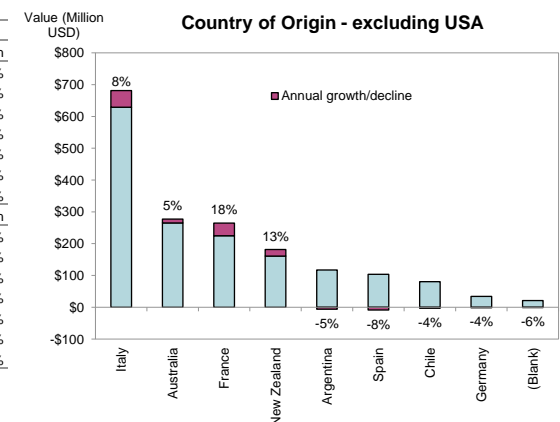
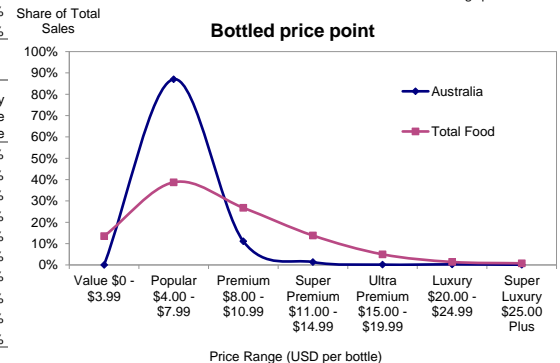
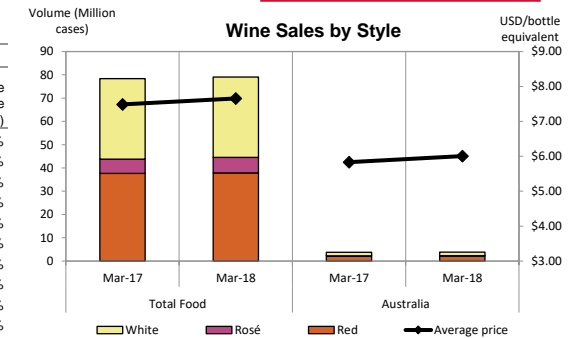
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	2.1	-6%	3%	62.3	4%
Cabernet Sauvignon	47.3	10%	4%	1,238.9	5%
Chardonnay	53.3	5%	4%	1,346.0	1%
Fume/Sauvignon Blanc	4.5	3%	1%	474.7	8%
Malbec	0.0	-26%	0%	129.2	-5%
Merlot	23.8	-7%	6%	372.9	-5%
Pinot Grigio/Pinot Gris	23.2	1%	4%	585.2	1%
Pinot Noir	8.0	-11%	1%	574.2	4%
Riesling	3.0	-21%	2%	129.6	-2%
Syrah/Shiraz	32.3	-6%	57%	56.3	-6%
White Zinfandel	0.6	7%	1%	119.7	-6%
Zinfandel	0.0	-37%	0%	128.4	-2%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	5,988.7	3%	77%	68.8	1%	81%
Italy	681.5	8%	9%	5.7	5%	7%
Australia	277.2	5%	4%	3.8	2%	5%
France	264.8	18%	3%	1.4	17%	2%
New Zealand	181.4	13%	2%	1.3	13%	1%
Argentina	117.3	-5%	2%	1.0	-5%	1%
Spain	103.8	-8%	1%	1.0	-10%	1%
Chile	80.4	-4%	1%	1.1	0%	1%
Germany	34.1	-4%	0%	0.3	-5%	0%
(Blank)	21.2	-6%	0%	0.1	-6%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	1,067.8	-3%	1,722	-7%	24.9	-20%
Popular \$4.00 - \$7.99	3,118.0	-4%	4,786	-3%	389.0	-13%
Premium \$8.00 - \$10.99	2,806.6	4%	2,529	0%	74.1	31%
Super Premium \$11.00 - \$14.99	1,695.5	10%	2,284	7%	63.3	-12%
Ultra Premium \$15.00 - \$19.99	627.5	13%	796	4%	18.6	36%
Luxury \$20.00 - \$24.99	223.4	11%	143	3%	4.7	5%
Super Luxury \$25.00 Plus	125.0	5%	147	8%	3.4	6%
Australia	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	85%	0.0	-91%
Popular \$4.00 - \$7.99	503.3	-4%	815	2%	348.9	-13%
Premium \$8.00 - \$10.99	119.0	80%	21.8	913%	36.0	172%
Super Premium \$11.00 - \$14.99	2.0	50%	1.2	-17%	23.5	-18%
Ultra Premium \$15.00 - \$19.99	0.8	50%	0.41	85%	2.1	-8%
Luxury \$20.00 - \$24.99	1.7	-27%	0.01	-67%	0.4	-24%
Super Luxury \$25.00 Plus	0.3	16%	0.01	-57%	2.5	6%



# Wine Australia providing insights on Australian Wine



## Total Convenience Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.6	6%	5.4%	11.5	4.3%
Value (million USD)	54	7%	5.2%	1,030	5.6%
Average price (USD/bottle equ.)	7.2	1.2%	na	7.5	1.2%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.1	13%	5.6%	2.7	8.4%
Value (million USD)	13	16%	5.5%	240	10.0%
Average price (USD/bottle equ.)	7.4	2.7%	na	7.5	1.5%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.31	7%	50%	8%	3.73	2%	32%
Rosé	0.016	-5%	3%	1%	1.38	8%	12%
White	0.288	5%	46%	5%	5.96	4%	52%
Sparkling	0.009	47%	2%	2%	0.44	8%	4%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	-7%	0.1%	0.0%	1.10	-6%	12%
Popular \$4.00 - \$7.99	0.567	1%	92.4%	9.9%	5.70	2%	63%
Premium \$8.00 - \$10.99	0.042	183%	6.9%	2.5%	1.67	11%	18%
Super Premium \$11.00 - \$14.99	0.003	-26%	0.6%	0.8%	0.45	2%	5%
Ultra Premium \$15.00 - \$19.99	0.000	-38%	0.0%	0.1%	0.13	17%	1%
Luxury \$20.00 - \$24.99	0.000	99%	0.1%	2.5%	0.02	-2%	0%
Super Luxury \$25.00 Plus	0.000	-62%	0.0%	1.5%	0.01	32%	0%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.42	10%	68%	8%	5.53	6%	48%
Bottle (1.5L)	0.19	-4%	31%	9%	2.13	-5%	18%
Soft-pack	0.00	-56%	0%	0%	0.97	-5%	8%
Can	0.00	-24%	0%	0%	0.05	37%	0%
Other	0.00	DNE	0.0%	0.0%	2.38	12%	21%

### NOTES & DEFINITIONS

Prepared: May 2018  
Source: Information Resources Incorporated, X-Rates

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### Varietal

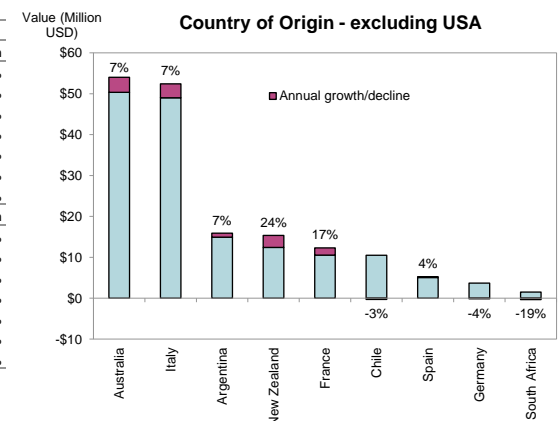
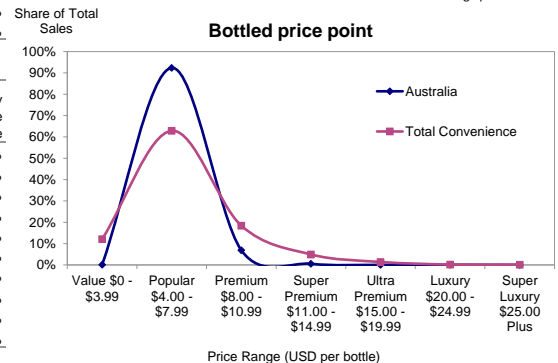
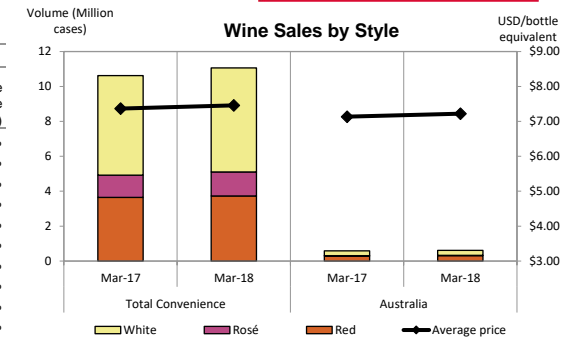
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.7	10%	2%	29.3	23%
Cabernet Sauvignon	8.3	13%	7%	124.8	9%
Chardonnay	11.3	2%	5%	220.9	2%
Fume/Sauvignon Blanc	0.9	-1%	2%	43.8	15%
Malbec	0.0	178%	0%	14.3	0%
Merlot	5.9	-11%	11%	54.3	-7%
Pinot Grigio/Pinot Gris	6.7	13%	5%	147.4	9%
Pinot Noir	1.0	-3%	3%	40.4	4%
Riesling	0.8	-13%	5%	14.5	-5%
Syrah/Shiraz	4.9	-10%	74%	6.6	-12%
White Zinfandel	0.4	-24%	1%	51.2	-2%
Zinfandel	0.0	0%	0%	6.0	0%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	856.8	5%	83%	10.0	4%	87%
Australia	54.0	7%	5%	0.6	6%	5%
Italy	52.4	7%	5%	0.4	5%	4%
Argentina	15.9	7%	2%	0.1	3%	1%
New Zealand	15.4	24%	1%	0.1	21%	1%
France	12.3	17%	1%	0.1	23%	1%
Chile	10.5	-3%	1%	0.1	0%	1%
Spain	5.3	4%	1%	0.0	5%	0%
Germany	3.7	-4%	0%	0.0	18%	0%
South Africa	1.5	-19%	0%	0.0	-17%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
<b>Total Market</b>						
Value \$0 - \$3.99	123.3	7%	339	-9%	4.7	-2%
Popular \$4.00 - \$7.99	578.2	5%	1,306	1%	54.6	-15%
Premium \$8.00 - \$10.99	245.7	16%	209	0%	6.6	29%
Super Premium \$11.00 - \$14.99	83.8	2%	131	-1%	1.6	-33%
Ultra Premium \$15.00 - \$19.99	26.5	19%	30	6%	0.9	29%
Luxury \$20.00 - \$24.99	4.5	-9%	3	-15%	0.0	-13%
Super Luxury \$25.00 Plus	2.2	-7%	3	110%	0.2	8%
<b>Australia</b>	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	-45%	0.0	23%
Popular \$4.00 - \$7.99	77.2	2%	139	0%	50.2	-11%
Premium \$8.00 - \$10.99	11.8	168%	1.1	2131%	3.1	162%
Super Premium \$11.00 - \$14.99	0.9	-40%	0.1	6%	0.7	-53%
Ultra Premium \$15.00 - \$19.99	0.0	-17%	0.00	0%	0.0	-38%
Luxury \$20.00 - \$24.99	0.0	867%	0.00	0%	0.0	0%
Super Luxury \$25.00 Plus	0.0	100%	0.00	0%	0.1	-43%





# Wine Australia providing insights on Australian Wine

## Total Drug Store Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.4	-8%	3.6%	10.2	-3.6%
Value (million USD)	25	-4%	3.8%	671	-0.4%
Average price (USD/bottle equ.)	5.7	4.2%	na	5.5	3.3%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.1	0%	4.1%	2.3	-3.9%
Value (million USD)	7	4%	4.2%	156	0.1%
Average price (USD/bottle equ.)	5.7	3.9%	na	5.6	4.2%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.22	-8%	60%	5%	4.06	-4%	40%
Rosé	0.004	-25%	1%	0%	1.16	-4%	11%
White	0.146	-7%	39%	3%	4.52	-3%	44%
Sparkling	0.001	30%	0%	0%	0.46	0%	4%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	0%	0.0%	0.0%	2.12	-12%	30%
Popular \$4.00 - \$7.99	0.357	-10%	96.3%	11.5%	3.09	-6%	44%
Premium \$8.00 - \$10.99	0.013	179%	3.4%	1.0%	1.34	3%	19%
Super Premium \$11.00 - \$14.99	0.001	-6%	0.2%	0.2%	0.40	9%	6%
Ultra Premium \$15.00 - \$19.99	0.000	9%	0.0%	0.0%	0.09	11%	1%
Luxury \$20.00 - \$24.99	0.000	-9%	0.0%	0.2%	0.02	8%	0%
Super Luxury \$25.00 Plus	0.000	0%	0.0%	0.2%	0.00	-8%	0%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.27	-7%	72%	8%	3.48	-5%	34%
Bottle (1.5L)	0.10	-9%	28%	4%	2.56	-6%	25%
Soft-pack	0.00	-100%	0%	0%	2.38	-1%	23%
Can	0.00	-98%	0%	0%	0.02	111%	0%
Other	0.00	DNE	0.0%	0.0%	1.30	-1%	13%

### NOTES & DEFINITIONS

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### Varietal

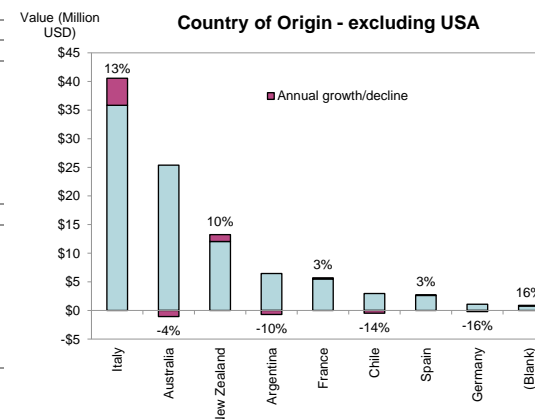
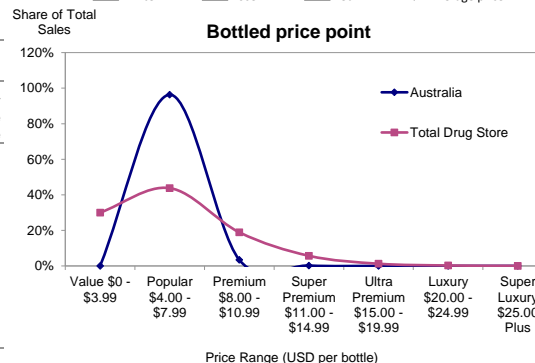
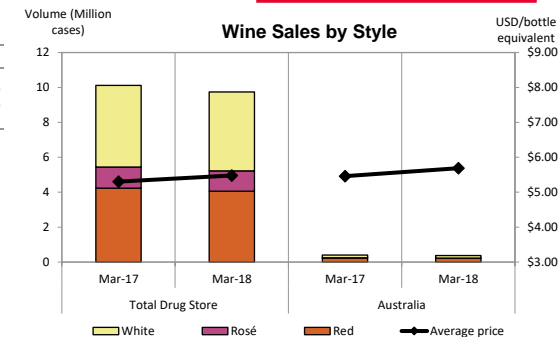
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.2	-21%	2%	13.4	6%
Cabernet Sauvignon	5.1	-1%	5%	111.0	1%
Chardonnay	5.6	-1%	4%	134.5	-1%
Fume/Sauvignon Blanc	0.1	2%	0%	32.2	7%
Malbec	0.0	-95%	0%	7.6	-8%
Merlot	4.1	-8%	10%	39.9	-12%
Pinot Grigio/Pinot Gris	2.2	20%	3%	65.2	0%
Pinot Noir	0.3	-37%	1%	33.2	2%
Riesling	0.1	-31%	1%	8.8	-6%
Syrah/Shiraz	3.5	-15%	88%	4.0	-14%
White Zinfandel	0.0	-30%	0%	20.1	-12%
Zinfandel	0.0	0%	0%	3.6	-13%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	571.5	-1%	85%	9.2	-4%	90%
Italy	40.6	13%	6%	0.3	7%	3%
Australia	25.4	-4%	4%	0.4	-8%	4%
New Zealand	13.2	10%	2%	0.1	7%	1%
Argentina	6.4	-10%	1%	0.1	-12%	1%
France	5.7	3%	1%	0.0	8%	0%
Chile	2.9	-14%	0%	0.0	-17%	0%
Spain	2.7	3%	0%	0.0	5%	0%
Germany	1.1	-16%	0%	0.0	-18%	0%
(Blank)	0.9	16%	0%	0.0	14%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	310.1	-2%	457	-9%	0.3	-54%
Popular \$4.00 - \$7.99	439.0	-7%	664	-5%	52.2	-16%
Premium \$8.00 - \$10.99	239.3	2%	191	-6%	0.8	-7%
Super Premium \$11.00 - \$14.99	117.9	10%	133	11%	1.1	5%
Ultra Premium \$15.00 - \$19.99	20.7	-2%	27	12%	0.2	93%
Luxury \$20.00 - \$24.99	3.0	2%	2	-8%	0.0	0%
Super Luxury \$25.00 Plus	1.6	-8%	1	-18%	0.0	0%
Australia	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	73.6	-7%	87	-3%	50.9	-16%
Premium \$8.00 - \$10.99	2.3	274%	0.1	1633%	0.1	27%
Super Premium \$11.00 - \$14.99	0.0	-46%	0.0	-14%	0.7	4%
Ultra Premium \$15.00 - \$19.99	0.0	100%	0.00	0%	0.0	17%
Luxury \$20.00 - \$24.99	0.0	-33%	0.00	0%	0.0	0%
Super Luxury \$25.00 Plus	0.0	-50%	0.00	0%	0.0	0%



# Wine Australia providing insights on Australian Wine



## California Grocery Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.3	-5%	1.7%	15.9	-1.8%
Value (million USD)	20	4%	1.2%	1,658	2.2%
Average price (USD/bottle equ.)	6.2	8.8%	na	8.7	4.1%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.1	9%	1.9%	3.6	0.3%
Value (million USD)	5	16%	1.4%	381	3.6%
Average price (USD/bottle equ.)	6.4	6.5%	na	8.9	3.3%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.18	-6%	70%	3%	6.68	-4%	42%
Rosé	0.000	-21%	0%	0%	1.00	13%	6%
White	0.078	-2%	29%	1%	6.73	-2%	42%
Sparkling	0.000	140%	0%	0%	1.45	2%	9%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	0%	0.0%	0.0%	1.87	-7%	15%
Popular \$4.00 - \$7.99	0.217	-14%	82.7%	6.5%	3.34	-7%	26%
Premium \$8.00 - \$10.99	0.035	186%	13.3%	1.0%	3.46	-3%	27%
Super Premium \$11.00 - \$14.99	0.007	-15%	2.6%	0.3%	2.34	5%	18%
Ultra Premium \$15.00 - \$19.99	0.002	70%	0.7%	0.2%	1.12	6%	9%
Luxury \$20.00 - \$24.99	0.001	71%	0.5%	0.3%	0.36	13%	3%
Super Luxury \$25.00 Plus	0.001	3%	0.2%	0.3%	0.24	9%	2%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.18	0%	67%	2%	9.98	-1%	63%
Bottle (1.5L)	0.09	-12%	33%	4%	2.05	-6%	13%
Soft-pack	0.00	-58%	0%	0%	1.56	-5%	10%
Can	0.00	DNE	0%	0%	0.04	48%	0%
Other	0.00	DNE	0.0%	0.0%	0.78	-6%	5%

### NOTES & DEFINITIONS

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### Varietal

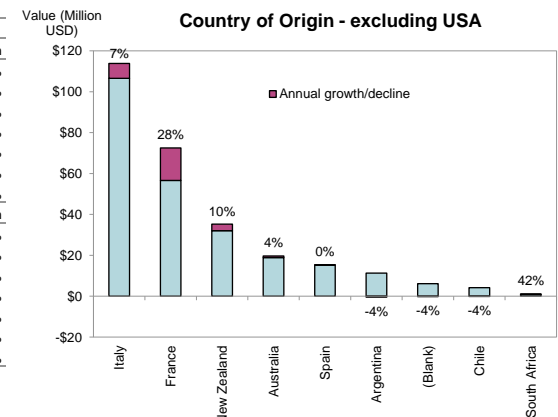
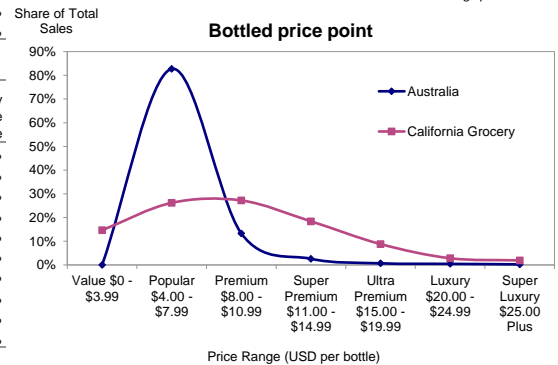
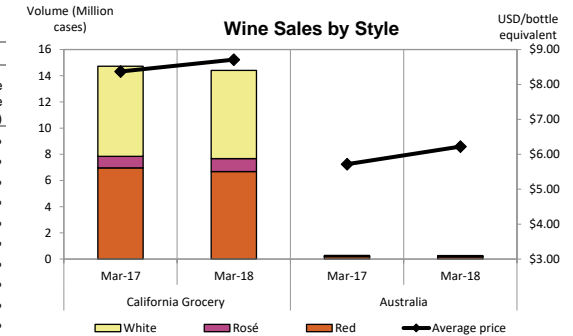
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.0	-37%	0%	5.1	-3%
Cabernet Sauvignon	3.9	21%	1%	280.1	1%
Chardonnay	4.0	4%	1%	390.0	-1%
Fume/Sauvignon Blanc	0.3	-2%	0%	125.0	6%
Malbec	0.0	0%	0%	13.7	-6%
Merlot	1.6	-16%	2%	66.0	-9%
Pinot Grigio/Pinot Gris	0.4	6%	1%	68.3	2%
Pinot Noir	0.6	-27%	0%	133.8	4%
Riesling	0.0	-5%	0%	9.9	-2%
Syrah/Shiraz	3.2	-15%	37%	8.8	-2%
White Zinfandel	0.0	0%	0%	14.1	-9%
Zinfandel	0.0	0%	0%	49.2	-6%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	1,374.8	1%	83%	13.8	-3%	87%
Italy	113.9	7%	7%	0.9	3%	6%
France	72.5	28%	4%	0.3	39%	2%
New Zealand	35.2	10%	2%	0.3	10%	2%
Australia	19.6	4%	1%	0.3	-5%	2%
Spain	15.4	0%	1%	0.1	-6%	1%
Argentina	11.3	-4%	1%	0.1	-7%	1%
(Blank)	6.1	-4%	0%	0.0	-5%	0%
Chile	4.1	-4%	0%	0.0	-10%	0%
South Africa	1.1	42%	0%	0.0	43%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
<b>Total Market</b>						
Value \$0 - \$3.99	266.1	-2%	482	-8%	13.2	-6%
Popular \$4.00 - \$7.99	502.0	-7%	983	-5%	33.5	-24%
Premium \$8.00 - \$10.99	550.4	-2%	766	-3%	5.6	16%
Super Premium \$11.00 - \$14.99	423.6	3%	768	1%	22.0	-4%
Ultra Premium \$15.00 - \$19.99	184.9	4%	371	-2%	6.6	66%
Luxury \$20.00 - \$24.99	103.3	8%	71	4%	1.0	32%
Super Luxury \$25.00 Plus	51.7	-4%	88	9%	0.9	5%
<b>Australia</b>	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	37.6	-13%	61	-6%	31.0	-25%
Premium \$8.00 - \$10.99	10.2	244%	2.8	2092%	2.7	154%
Super Premium \$11.00 - \$14.99	0.6	58%	0.0	16%	3.7	-20%
Ultra Premium \$15.00 - \$19.99	0.2	108%	0.25	182%	0.5	-1%
Luxury \$20.00 - \$24.99	0.3	6%	0.00	0%	0.1	-7%
Super Luxury \$25.00 Plus	0.0	-25%	0.00	0%	0.5	10%



# Wine Australia providing insights on Australian Wine



## Great Lakes Grocery Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.8	1%	4.5%	16.7	0.3%
Value (million USD)	57	4%	4.2%	1,372	3.0%
Average price (USD/bottle equ.)	6.3	2.6%	na	6.8	2.7%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.2	0%	5.1%	3.6	1.6%
Value (million USD)	14	5%	4.7%	298	5.0%
Average price (USD/bottle equ.)	6.4	4.2%	na	6.9	3.3%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.47	2%	62%	6%	7.52	0%	45%
Rosé	0.010	-8%	1%	1%	1.66	3%	10%
White	0.273	0%	36%	4%	6.64	-1%	40%
Sparkling	0.008	9%	1%	1%	0.88	5%	5%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	-100%	0.0%	0.0%	1.74	-7%	15%
Popular \$4.00 - \$7.99	0.621	-5%	83.0%	12.3%	5.04	-5%	42%
Premium \$8.00 - \$10.99	0.110	84%	14.7%	3.4%	3.22	5%	27%
Super Premium \$11.00 - \$14.99	0.014	-8%	1.9%	1.0%	1.38	15%	12%
Ultra Premium \$15.00 - \$19.99	0.001	-8%	0.1%	0.2%	0.39	14%	3%
Luxury \$20.00 - \$24.99	0.002	4%	0.2%	1.9%	0.10	14%	1%
Super Luxury \$25.00 Plus	0.001	116%	0.1%	1.3%	0.05	17%	0%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.53	4%	70%	6%	8.21	2%	49%
Bottle (1.5L)	0.22	-2%	28%	8%	2.74	-4%	16%
Soft-pack	0.00	-26%	0%	0%	3.71	-1%	22%
Can	0.00	-79%	0%	3%	0.05	-12%	0%
Other	0.00	DNE	0.0%	0.0%	1.11	-3%	7%

### NOTES & DEFINITIONS

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### Varietal

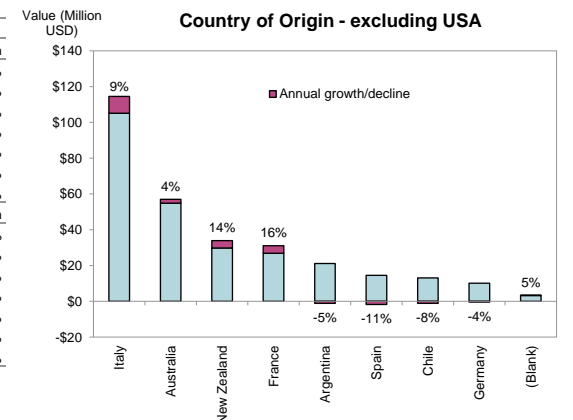
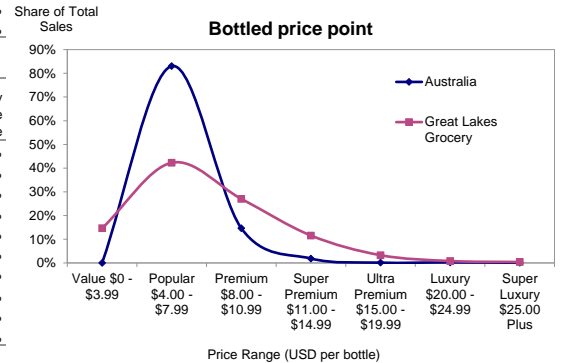
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.7	-10%	4%	18.8	-1%
Cabernet Sauvignon	10.4	7%	5%	216.4	6%
Chardonnay	8.8	7%	5%	190.7	1%
Fume/Sauvignon Blanc	0.9	8%	1%	78.3	10%
Malbec	0.0	-36%	0%	22.0	-7%
Merlot	4.5	-8%	7%	66.4	-5%
Pinot Grigio/Pinot Gris	4.2	0%	4%	103.6	-1%
Pinot Noir	1.8	-14%	2%	84.1	3%
Riesling	0.5	-18%	2%	34.7	-3%
Syrah/Shiraz	6.6	-5%	68%	9.7	-7%
White Zinfandel	0.0	-25%	0%	26.1	-9%
Zinfandel	0.0	0%	0%	18.6	3%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	1,068.1	2%	78%	13.9	0%	83%
Italy	114.5	9%	8%	1.0	6%	6%
Australia	57.0	4%	4%	0.8	1%	5%
New Zealand	33.9	14%	2%	0.2	15%	1%
France	31.1	16%	2%	0.2	17%	1%
Argentina	21.1	-5%	2%	0.2	-6%	1%
Spain	14.5	-11%	1%	0.1	-12%	1%
Chile	13.1	-8%	1%	0.2	-3%	1%
Germany	10.1	-4%	1%	0.1	-3%	1%
(Blank)	3.4	5%	0%	0.0	7%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	209.5	-3%	276	-8%	3.6	-36%
Popular \$4.00 - \$7.99	566.5	-3%	742	-4%	73.5	-14%
Premium \$8.00 - \$10.99	508.9	6%	350	2%	14.5	46%
Super Premium \$11.00 - \$14.99	285.7	18%	306	12%	8.8	-13%
Ultra Premium \$15.00 - \$19.99	101.6	15%	67	13%	2.1	53%
Luxury \$20.00 - \$24.99	21.8	17%	11	4%	0.3	-33%
Super Luxury \$25.00 Plus	15.6	14%	9	10%	0.3	8%
Australia	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	-21%	0.0	-100%
Popular \$4.00 - \$7.99	104.4	-2%	127	4%	67.5	-13%
Premium \$8.00 - \$10.99	28.5	47%	5.4	855%	8.0	153%
Super Premium \$11.00 - \$14.99	0.5	299%	0.3	26%	5.7	-8%
Ultra Premium \$15.00 - \$19.99	0.2	133%	0.06	-21%	0.3	-41%
Luxury \$20.00 - \$24.99	0.3	-35%	0.01	-60%	0.1	-64%
Super Luxury \$25.00 Plus	0.0	58%	0.00	0%	0.3	18%



# Wine Australia providing insights on Australian Wine

## Midsouth Grocery Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.6	8%	5.3%	11.8	4.4%
Value (million USD)	46	9%	4.3%	1,069	5.0%
Average price (USD/bottle equ.)	6.2	0.9%	na	7.5	0.6%

### Wine Sales - 12 Weeks to 1st of April 2018

	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.2	12%	6.1%	2.6	1.8%
Value (million USD)	12	15%	5.0%	238	3.9%
Average price (USD/bottle equ.)	6.2	2.7%	na	7.5	2.0%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.35	9%	56%	7%	5.28	4%	45%
Rosé	0.006	-16%	1%	1%	0.91	17%	8%
White	0.260	7%	42%	5%	4.95	2%	42%
Sparkling	0.007	-9%	1%	1%	0.67	8%	6%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	193%	0.1%	0.0%	1.17	1%	13%
Popular \$4.00 - \$7.99	0.528	1%	86.0%	14.0%	3.77	-2%	43%
Premium \$8.00 - \$10.99	0.074	111%	12.0%	3.1%	2.40	5%	27%
Super Premium \$11.00 - \$14.99	0.008	-10%	1.3%	0.8%	1.03	9%	12%
Ultra Premium \$15.00 - \$19.99	0.001	1%	0.2%	0.4%	0.34	19%	4%
Luxury \$20.00 - \$24.99	0.001	94%	0.2%	2.0%	0.07	20%	1%
Super Luxury \$25.00 Plus	0.001	34%	0.1%	2.0%	0.03	30%	0%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.28	13%	45%	5%	5.87	3%	50%
Bottle (1.5L)	0.34	4%	54%	13%	2.59	1%	22%
Soft-pack	0.00	-88%	0%	0%	2.08	12%	18%
Can	0.00	-82%	0%	1%	0.03	40%	0%
Other	0.00	DNE	0.0%	0.0%	0.56	4%	5%

### NOTES & DEFINITIONS

Prepared: May 2018  
Source: Information Resources Incorporated, X-Rates

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### Varietal

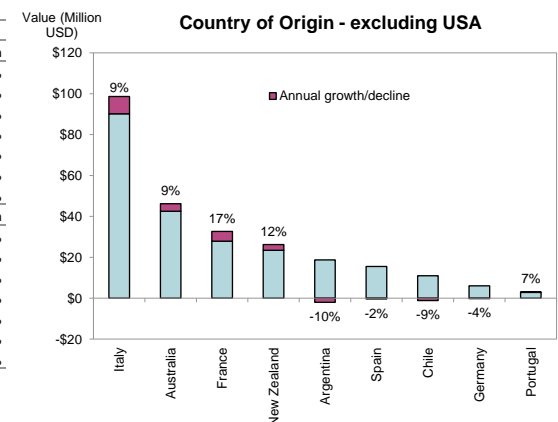
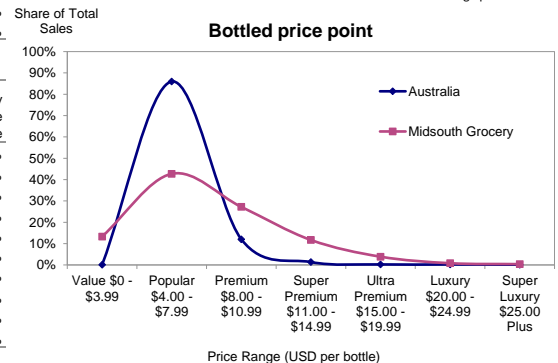
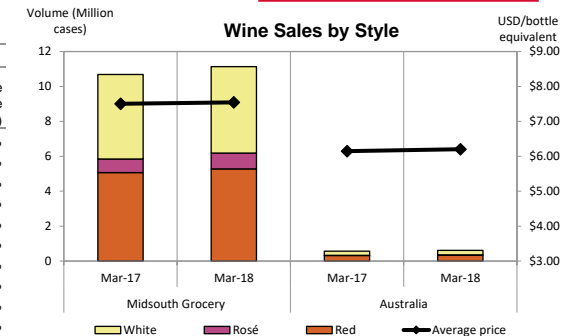
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.3	-16%	3%	10.7	6%
Cabernet Sauvignon	7.6	15%	5%	155.9	6%
Chardonnay	9.9	7%	6%	173.8	1%
Fume/Sauvignon Blanc	0.8	5%	1%	63.4	7%
Malbec	0.0	23%	0%	22.4	-8%
Merlot	3.5	-3%	7%	50.4	-3%
Pinot Grigio/Pinot Gris	3.7	6%	4%	95.3	1%
Pinot Noir	1.3	-6%	2%	77.7	6%
Riesling	0.5	-22%	3%	20.5	-1%
Syrah/Shiraz	5.1	-4%	66%	7.7	-4%
White Zinfandel	0.1	-16%	0%	17.8	-2%
Zinfandel	0.0	0%	0%	14.1	0%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	805.4	5%	75%	9.5	5%	80%
Italy	98.6	9%	9%	0.8	5%	7%
Australia	46.2	9%	4%	0.6	8%	5%
France	32.7	17%	3%	0.2	16%	2%
New Zealand	26.2	12%	2%	0.2	12%	2%
Argentina	18.7	-10%	2%	0.2	-10%	1%
Spain	15.5	-2%	1%	0.1	-4%	1%
Chile	10.9	-9%	1%	0.1	-11%	1%
Germany	6.0	-4%	1%	0.1	-5%	0%
Portugal	3.0	7%	0%	0.0	10%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	153.8	4%	229	-4%	0.3	-57%
Popular \$4.00 - \$7.99	424.2	-3%	670	-3%	54.4	-11%
Premium \$8.00 - \$10.99	374.2	9%	315	2%	11.2	23%
Super Premium \$11.00 - \$14.99	191.6	9%	250	5%	6.9	-13%
Ultra Premium \$15.00 - \$19.99	70.3	16%	81	14%	2.0	44%
Luxury \$20.00 - \$24.99	16.2	17%	11	6%	0.2	32%
Super Luxury \$25.00 Plus	8.1	18%	8	7%	0.5	17%
Australia						
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	73.9	2%	148	7%	49.3	-9%
Premium \$8.00 - \$10.99	21.7	73%	3.5	606%	6.8	80%
Super Premium \$11.00 - \$14.99	0.3	33%	0.4	-22%	3.7	-15%
Ultra Premium \$15.00 - \$19.99	0.2	-13%	0.00	-25%	0.9	11%
Luxury \$20.00 - \$24.99	0.3	16%	0.00	0%	0.0	-13%
Super Luxury \$25.00 Plus	0.1	86%	0.00	0%	0.5	16%



# Wine Australia providing insights on Australian Wine

## Northeast Grocery Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.2	12%	5.6%	4.2	13.6%
Value (million USD)	19	19%	4.7%	398	19.7%
Average price (USD/bottle equ.)	6.6	5.8%	na	7.8	5.4%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.1	14%	6.6%	0.9	8.2%
Value (million USD)	5	22%	5.6%	86	14.3%
Average price (USD/bottle equ.)	6.6	6.7%	na	7.8	5.6%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.13	13%	54%	7%	1.84	12%	43%
Rosé	0.005	9%	2%	1%	0.32	28%	7%
White	0.104	12%	44%	6%	1.88	12%	44%
Sparkling	0.001	-21%	1%	1%	0.22	23%	5%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	-85%	0.0%	0.0%	0.30	-4%	9%
Popular \$4.00 - \$7.99	0.208	7%	88.9%	14.1%	1.47	9%	46%
Premium \$8.00 - \$10.99	0.023	133%	9.7%	2.7%	0.84	18%	27%
Super Premium \$11.00 - \$14.99	0.003	2%	1.2%	0.7%	0.43	25%	13%
Ultra Premium \$15.00 - \$19.99	0.000	53%	0.1%	0.2%	0.10	29%	3%
Luxury \$20.00 - \$24.99	0.000	121%	0.1%	0.5%	0.02	24%	1%
Super Luxury \$25.00 Plus	0.000	21%	0.1%	1.8%	0.01	21%	0%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.09	20%	38%	5%	1.95	14%	46%
Bottle (1.5L)	0.14	8%	60%	14%	1.06	10%	25%
Soft-pack	0.00	5250%	0%	0%	0.80	15%	19%
Can	0.00	3%	1%	28%	0.01	28%	0%
Other	0.00	DNE	0.0%	0.0%	0.22	15%	5%

### NOTES & DEFINITIONS

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### Varietal

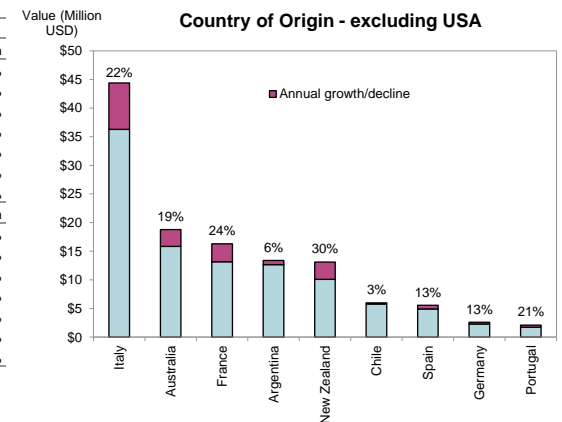
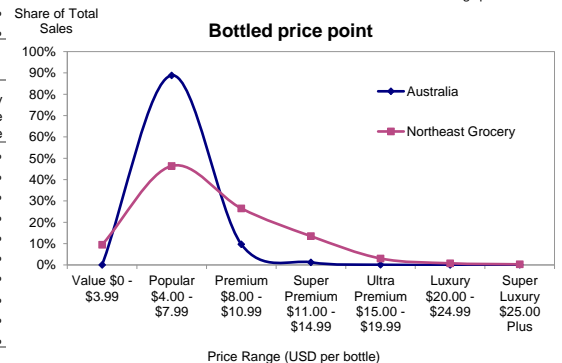
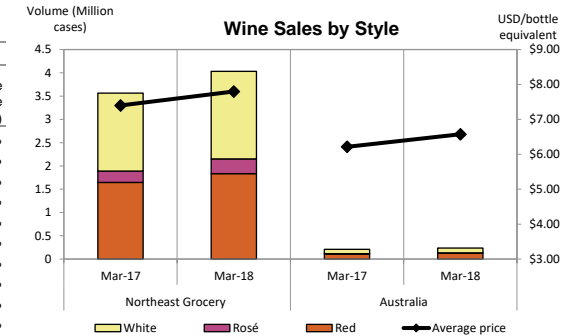
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.3	22%	7%	4.0	45%
Cabernet Sauvignon	3.0	31%	5%	56.2	21%
Chardonnay	4.0	20%	6%	63.3	16%
Fume/Sauvignon Blanc	0.5	5%	2%	29.5	27%
Malbec	0.0	0%	0%	10.7	10%
Merlot	1.5	2%	8%	19.7	7%
Pinot Grigio/Pinot Gris	1.8	22%	4%	44.9	17%
Pinot Noir	0.7	4%	3%	26.7	19%
Riesling	0.4	-3%	4%	8.2	15%
Syrah/Shiraz	1.9	7%	65%	2.9	4%
White Zinfandel	0.0	-14%	1%	7.5	15%
Zinfandel	0.0	0%	0%	4.2	13%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	273.2	20%	69%	3.1	13%	74%
Italy	44.4	22%	11%	0.4	19%	9%
Australia	18.8	19%	5%	0.2	12%	6%
France	16.3	24%	4%	0.1	24%	2%
Argentina	13.4	6%	3%	0.1	3%	3%
New Zealand	13.1	30%	3%	0.1	25%	2%
Chile	6.0	3%	1%	0.1	0%	2%
Spain	5.6	13%	1%	0.1	14%	1%
Germany	2.6	13%	1%	0.0	7%	0%
Portugal	2.1	21%	1%	0.0	23%	1%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
<b>Total Market</b>						
Value \$0 - \$3.99	34.9	1%	51	-6%	1.0	7%
Popular \$4.00 - \$7.99	159.3	8%	253	6%	20.1	-8%
Premium \$8.00 - \$10.99	125.2	17%	96	16%	4.2	35%
Super Premium \$11.00 - \$14.99	74.1	25%	105	20%	2.3	-6%
Ultra Premium \$15.00 - \$19.99	18.3	31%	23	26%	0.4	41%
Luxury \$20.00 - \$24.99	4.4	28%	3	11%	0.0	29%
Super Luxury \$25.00 Plus	2.2	21%	2	17%	0.1	13%
<b>Australia</b>	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	-80%
Popular \$4.00 - \$7.99	27.9	12%	54	15%	17.8	-4%
Premium \$8.00 - \$10.99	7.2	98%	1.0	903%	2.0	171%
Super Premium \$11.00 - \$14.99	0.1	27%	0.1	-19%	1.2	-9%
Ultra Premium \$15.00 - \$19.99	0.0	86%	0.03	2700%	0.1	24%
Luxury \$20.00 - \$24.99	0.0	-13%	0.00	0%	0.0	-67%
Super Luxury \$25.00 Plus	0.0	200%	0.00	0%	0.1	17%



# Wine Australia providing insights on Australian Wine

## Plains Grocery Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.2	7%	5.2%	3.3	0.4%
Value (million USD)	13	9%	4.5%	283	1.8%
Average price (USD/bottle equ.)	6.3	2.0%	na	7.2	1.3%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.0	-4%	5.4%	0.7	0.6%
Value (million USD)	3	3%	4.9%	61	2.5%
Average price (USD/bottle equ.)	6.4	7.1%	na	7.1	1.8%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.10	10%	60%	7%	1.48	0%	45%
Rosé	0.003	-1%	2%	1%	0.31	3%	9%
White	0.063	3%	37%	5%	1.29	0%	40%
Sparkling	0.002	20%	1%	1%	0.19	6%	6%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	1800%	0.0%	0.0%	0.27	-5%	12%
Popular \$4.00 - \$7.99	0.137	1%	81.9%	14.2%	0.97	-4%	42%
Premium \$8.00 - \$10.99	0.026	66%	15.5%	3.9%	0.66	2%	28%
Super Premium \$11.00 - \$14.99	0.003	-8%	2.1%	1.2%	0.29	5%	12%
Ultra Premium \$15.00 - \$19.99	0.000	-22%	0.1%	0.2%	0.10	8%	4%
Luxury \$20.00 - \$24.99	0.001	-16%	0.3%	2.6%	0.02	4%	1%
Super Luxury \$25.00 Plus	0.000	-8%	0.1%	1.5%	0.01	7%	1%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.14	10%	84%	8%	1.80	0%	55%
Bottle (1.5L)	0.02	-6%	14%	6%	0.39	-4%	12%
Soft-pack	0.00	79%	0%	0%	0.73	2%	22%
Can	0.00	-22%	0%	5%	0.01	3%	0%
Other	0.00	DNE	0.0%	0.0%	0.14	-2%	4%

### NOTES & DEFINITIONS

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### Varietal

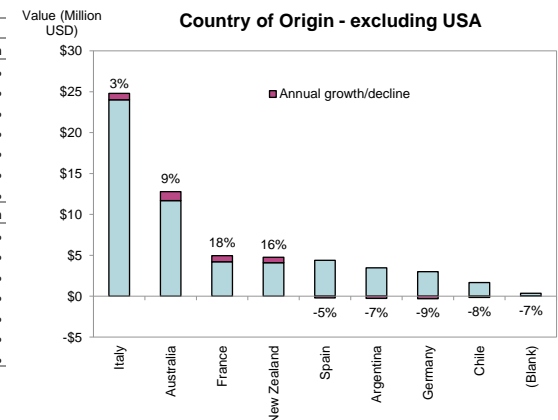
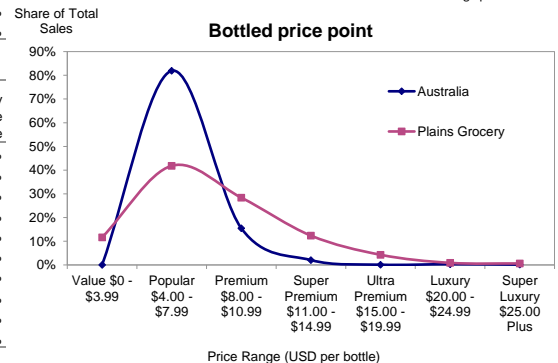
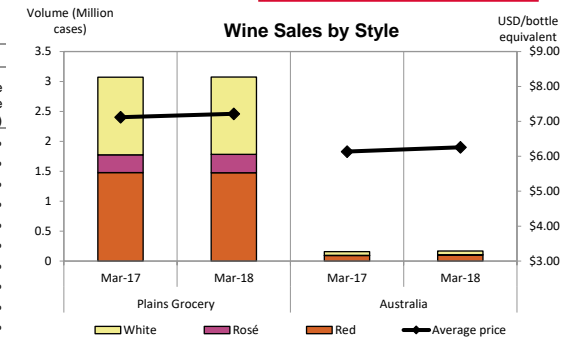
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.2	-5%	6%	3.5	-2%
Cabernet Sauvignon	1.9	9%	5%	42.3	3%
Chardonnay	1.9	9%	5%	41.1	1%
Fume/Sauvignon Blanc	0.3	6%	2%	14.2	8%
Malbec	0.0	-35%	0%	4.4	-2%
Merlot	1.0	6%	8%	12.6	-3%
Pinot Grigio/Pinot Gris	0.8	9%	5%	17.7	0%
Pinot Noir	0.6	5%	3%	19.0	1%
Riesling	0.2	-8%	3%	7.3	-5%
Syrah/Shiraz	1.5	14%	61%	2.4	3%
White Zinfandel	0.0	-9%	0%	4.7	-11%
Zinfandel	0.0	-37%	0%	4.9	-3%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	222.5	1%	79%	2.7	0%	82%
Italy	24.8	3%	9%	0.2	3%	6%
Australia	12.8	9%	5%	0.2	7%	5%
France	5.0	18%	2%	0.0	16%	1%
New Zealand	4.8	16%	2%	0.0	17%	1%
Spain	4.4	-5%	2%	0.1	-4%	2%
Argentina	3.5	-7%	1%	0.0	-7%	1%
Germany	3.0	-9%	1%	0.0	-12%	1%
Chile	1.7	-8%	1%	0.0	-6%	1%
(Blank)	0.3	-7%	0%	0.0	-5%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	33.2	-7%	52	0%	5.3	-9%
Popular \$4.00 - \$7.99	97.0	-3%	150	-3%	15.6	-4%
Premium \$8.00 - \$10.99	100.5	1%	82	0%	3.3	86%
Super Premium \$11.00 - \$14.99	56.4	6%	62	7%	2.4	-4%
Ultra Premium \$15.00 - \$19.99	22.3	14%	19	12%	0.4	-13%
Luxury \$20.00 - \$24.99	4.8	7%	3	-1%	0.1	-4%
Super Luxury \$25.00 Plus	4.5	4%	3	0%	0.2	10%
Australia	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	1800%
Popular \$4.00 - \$7.99	17.9	3%	27	3%	13.8	-1%
Premium \$8.00 - \$10.99	6.3	20%	1.4	1670%	2.4	335%
Super Premium \$11.00 - \$14.99	0.3	374%	0.1	-42%	1.3	0%
Ultra Premium \$15.00 - \$19.99	0.0	-14%	0.02	64%	0.0	-44%
Luxury \$20.00 - \$24.99	0.1	-33%	0.00	0%	0.0	-43%
Super Luxury \$25.00 Plus	0.0	-16%	0.00	0%	0.1	4%





# Wine Australia providing insights on Australian Wine



## South Central Grocery Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.3	-2%	4.9%	5.5	-0.2%
Value (million USD)	19	1%	3.7%	511	2.5%
Average price (USD/bottle equ.)	5.9	3.2%	na	7.8	2.7%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.1	0%	5.6%	1.2	0.9%
Value (million USD)	5	8%	4.2%	115	3.9%
Average price (USD/bottle equ.)	5.9	8.1%	na	7.8	2.9%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.17	0%	62%	6%	2.62	0%	48%
Rosé	0.003	-10%	1%	1%	0.49	6%	9%
White	0.098	-4%	36%	5%	2.00	-2%	37%
Sparkling	0.001	-40%	0%	0%	0.37	2%	7%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	0%	0.0%	0.0%	0.56	-7%	14%
Popular \$4.00 - \$7.99	0.235	-8%	87.4%	15.7%	1.49	-5%	37%
Premium \$8.00 - \$10.99	0.029	149%	10.6%	2.7%	1.04	2%	26%
Super Premium \$11.00 - \$14.99	0.004	-24%	1.4%	0.6%	0.60	6%	15%
Ultra Premium \$15.00 - \$19.99	0.000	15%	0.1%	0.1%	0.26	10%	6%
Luxury \$20.00 - \$24.99	0.001	-13%	0.3%	1.2%	0.07	8%	2%
Super Luxury \$25.00 Plus	0.001	1%	0.2%	1.3%	0.04	15%	1%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.15	-1%	57%	6%	2.74	1%	50%
Bottle (1.5L)	0.12	-2%	43%	11%	1.06	-4%	19%
Soft-pack	0.00	-93%	0%	0%	0.98	0%	18%
Can	0.00	-86%	0%	2%	0.01	15%	0%
Other	0.00	DNE	0.0%	0.0%	0.33	0%	6%

### NOTES & DEFINITIONS

Prepared: May 2018  
Source: Information Resources Incorporated, X-Rates

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### Varietal

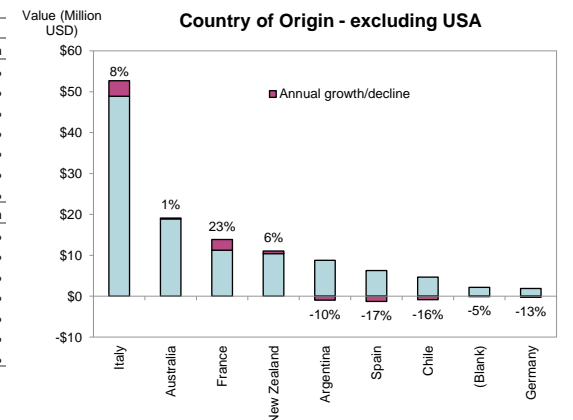
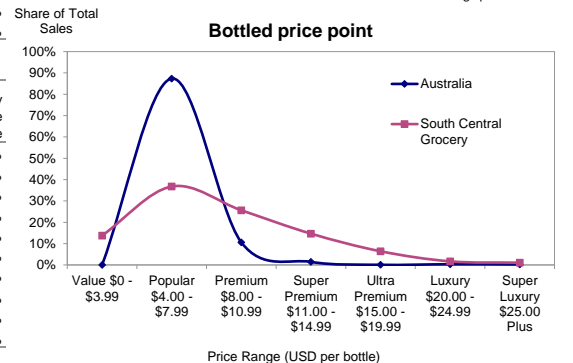
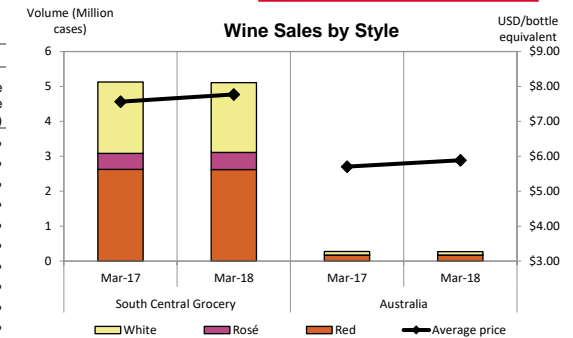
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.2	-16%	3%	4.5	0%
Cabernet Sauvignon	3.5	9%	4%	98.4	4%
Chardonnay	3.5	0%	4%	80.4	-1%
Fume/Sauvignon Blanc	0.2	-7%	1%	24.8	4%
Malbec	0.0	0%	0%	10.3	-10%
Merlot	1.9	-8%	7%	26.3	-6%
Pinot Grigio/Pinot Gris	1.5	-6%	4%	35.0	-3%
Pinot Noir	0.8	-15%	2%	42.0	4%
Riesling	0.0	-38%	1%	5.4	-5%
Syrah/Shiraz	2.4	-7%	77%	3.1	-7%
White Zinfandel	0.0	12%	0%	8.7	-7%
Zinfandel	0.0	0%	0%	6.6	1%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	389.4	2%	76%	4.4	0%	80%
Italy	52.7	8%	10%	0.4	2%	8%
Australia	19.1	1%	4%	0.3	-2%	5%
France	13.9	23%	3%	0.1	17%	1%
New Zealand	11.0	6%	2%	0.1	3%	1%
Argentina	8.8	-10%	2%	0.1	-10%	1%
Spain	6.3	-17%	1%	0.1	-27%	1%
Chile	4.7	-16%	1%	0.1	-16%	1%
(Blank)	2.1	-5%	0%	0.0	-9%	0%
Germany	1.9	-13%	0%	0.0	-13%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	71.6	-5%	112	-8%	0.5	-33%
Popular \$4.00 - \$7.99	195.2	-5%	267	-4%	26.0	-12%
Premium \$8.00 - \$10.99	195.9	5%	124	-4%	3.2	112%
Super Premium \$11.00 - \$14.99	141.1	5%	147	8%	2.9	-25%
Ultra Premium \$15.00 - \$19.99	67.6	10%	60	8%	1.1	26%
Luxury \$20.00 - \$24.99	17.8	13%	10	2%	0.1	21%
Super Luxury \$25.00 Plus	15.1	13%	8	2%	0.5	2%
Australia	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	43.2	-5%	55	-3%	23.8	-13%
Premium \$8.00 - \$10.99	5.6	353%	1.5	1999%	2.7	230%
Super Premium \$11.00 - \$14.99	0.1	-15%	0.0	4%	1.9	-27%
Ultra Premium \$15.00 - \$19.99	0.0	0%	0.02	0%	0.1	-10%
Luxury \$20.00 - \$24.99	0.4	-31%	0.00	0%	0.0	3%
Super Luxury \$25.00 Plus	0.0	-16%	0.00	50%	0.5	1%



# Wine Australia providing insights on Australian Wine

## Southeast Grocery Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	1.1	0%	6.6%	16.9	2.9%
Value (million USD)	75	3%	5.0%	1,505	4.9%
Average price (USD/bottle equ.)	5.7	3.0%	na	7.4	1.9%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.3	9%	7.2%	4.1	2.0%
Value (million USD)	20	9%	5.4%	370	4.8%
Average price (USD/bottle equ.)	5.7	-0.1%	na	7.5	2.8%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.60	0%	54%	8%	7.57	3%	45%
Rosé	0.014	29%	1%	1%	1.33	8%	8%
White	0.483	-1%	44%	7%	6.91	1%	41%
Sparkling	0.012	-4%	1%	1%	1.06	9%	6%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	3875%	0.0%	0.0%	1.97	-8%	14%
Popular \$4.00 - \$7.99	1.006	-5%	91.7%	15.4%	6.55	-1%	47%
Premium \$8.00 - \$10.99	0.081	171%	7.4%	2.5%	3.22	6%	23%
Super Premium \$11.00 - \$14.99	0.005	-43%	0.5%	0.4%	1.54	16%	11%
Ultra Premium \$15.00 - \$19.99	0.000	-9%	0.0%	0.0%	0.46	20%	3%
Luxury \$20.00 - \$24.99	0.003	98%	0.3%	2.4%	0.14	34%	1%
Super Luxury \$25.00 Plus	0.000	33%	0.0%	0.3%	0.04	19%	0%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.54	-2%	49%	7%	7.92	3%	47%
Bottle (1.5L)	0.55	2%	50%	11%	4.95	1%	29%
Soft-pack	0.00	-93%	0%	0%	1.63	7%	10%
Can	0.00	DNE	0%	0%	0.03	-27%	0%
Other	0.00	DNE	0.0%	0.0%	1.29	-1%	8%

### NOTES & DEFINITIONS

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### Varietal

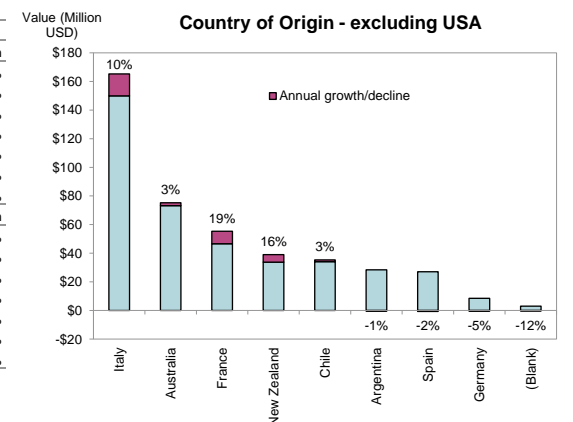
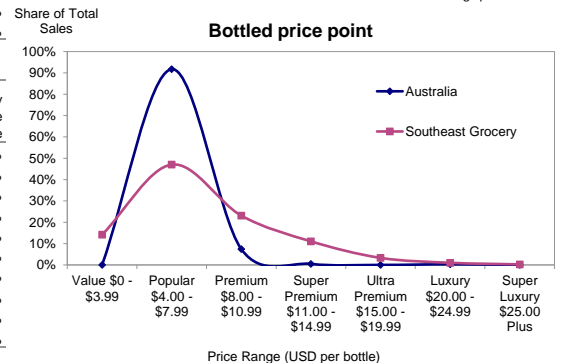
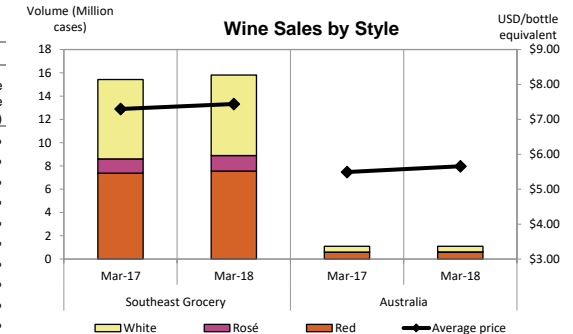
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.2	18%	2%	12.3	7%
Cabernet Sauvignon	13.1	8%	5%	240.7	7%
Chardonnay	15.6	3%	7%	235.9	2%
Fume/Sauvignon Blanc	1.1	2%	1%	89.2	8%
Malbec	0.0	46%	0%	29.9	-1%
Merlot	7.9	-8%	10%	81.3	-4%
Pinot Grigio/Pinot Gris	8.6	-2%	6%	147.0	2%
Pinot Noir	1.4	-10%	1%	121.7	5%
Riesling	1.1	-27%	5%	24.2	-1%
Syrah/Shiraz	7.8	-6%	77%	10.1	-9%
White Zinfandel	0.5	15%	2%	30.1	-6%
Zinfandel	0.0	0%	0%	14.0	5%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	1,062.4	4%	71%	12.6	2%	75%
Italy	165.2	10%	11%	1.5	7%	9%
Australia	75.2	3%	5%	1.1	0%	7%
France	55.3	19%	4%	0.3	15%	2%
New Zealand	39.0	16%	3%	0.3	17%	2%
Chile	35.3	3%	2%	0.5	9%	3%
Argentina	28.4	-1%	2%	0.2	0%	1%
Spain	27.0	-2%	2%	0.3	-3%	2%
Germany	8.4	-5%	1%	0.1	-5%	0%
(Blank)	3.0	-12%	0%	0.0	-13%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	192.3	-12%	356	-11%	0.3	-84%
Popular \$4.00 - \$7.99	877.6	-2%	1,195	-1%	107.4	-12%
Premium \$8.00 - \$10.99	580.7	6%	433	2%	13.5	53%
Super Premium \$11.00 - \$14.99	332.0	17%	363	16%	4.7	-29%
Ultra Premium \$15.00 - \$19.99	96.7	27%	95	16%	1.0	62%
Luxury \$20.00 - \$24.99	27.1	25%	16	6%	0.1	13%
Super Luxury \$25.00 Plus	12.8	25%	10	9%	0.1	35%
Australia						
Value \$0 - \$3.99	0.0	0%	0	-75%	0.0	0%
Popular \$4.00 - \$7.99	158.0	-6%	253	2%	100.8	-12%
Premium \$8.00 - \$10.99	26.7	126%	4.1	800%	7.7	228%
Super Premium \$11.00 - \$14.99	0.1	-15%	0.2	-24%	3.0	-30%
Ultra Premium \$15.00 - \$19.99	0.0	213%	0.01	-32%	0.1	-26%
Luxury \$20.00 - \$24.99	0.1	-64%	0.00	0%	0.1	21%
Super Luxury \$25.00 Plus	0.0	0%	0.00	0%	0.1	46%





# Wine Australia providing insights on Australian Wine



## West Grocery Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.5	-2%	3.9%	12.3	-1.6%
Value (million USD)	33	-2%	3.0%	1,110	-0.8%
Average price (USD/bottle equ.)	5.7	0.5%	na	7.5	0.8%

### Wine Sales - 12 Weeks to 1st of April 2018

	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.1	2%	4.3%	2.8	0.7%
Value (million USD)	8	4%	3.3%	253	2.1%
Average price (USD/bottle equ.)	5.8	1.8%	na	7.5	1.5%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.30	-3%	62%	5%	5.58	-3%	45%
Rosé	0.005	-15%	1%	1%	0.92	9%	7%
White	0.175	0%	36%	4%	4.98	-2%	40%
Sparkling	0.003	-13%	1%	0%	0.82	1%	7%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
Value \$0 - \$3.99	0.000	0%	0.0%	0.0%	1.11	-3%	13%
Popular \$4.00 - \$7.99	0.426	-6%	88.2%	14.6%	2.91	-8%	34%
Premium \$8.00 - \$10.99	0.049	79%	10.1%	1.9%	2.61	-2%	30%
Super Premium \$11.00 - \$14.99	0.006	-35%	1.3%	0.5%	1.31	2%	15%
Ultra Premium \$15.00 - \$19.99	0.000	-24%	0.1%	0.1%	0.44	5%	5%
Luxury \$20.00 - \$24.99	0.001	68%	0.2%	1.0%	0.12	2%	1%
Super Luxury \$25.00 Plus	0.000	-23%	0.1%	0.7%	0.07	4%	1%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.25	-3%	51%	4%	6.19	-3%	50%
Bottle (1.5L)	0.23	-1%	48%	12%	1.95	-5%	16%
Soft-pack	0.00	-30%	0%	0%	2.68	2%	22%
Can	0.00	-8%	0%	1%	0.03	71%	0%
Other	0.00	DNE	0.0%	0.0%	0.65	-1%	5%

### NOTES & DEFINITIONS

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### Varietal

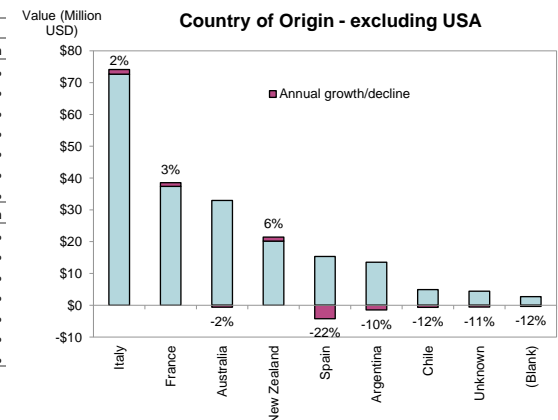
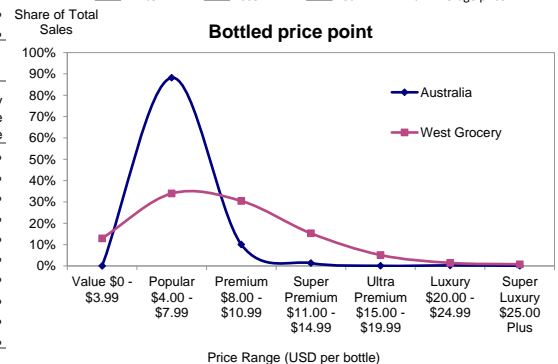
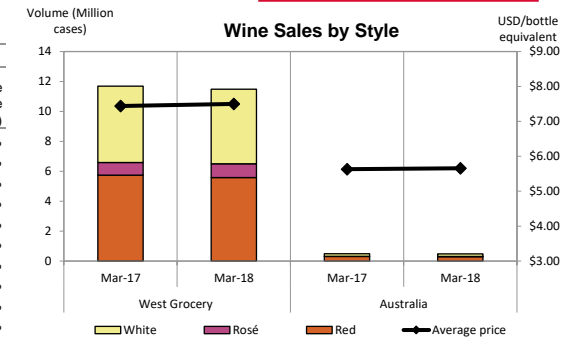
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.3	-19%	5%	6.8	6%
Cabernet Sauvignon	4.9	1%	3%	168.4	0%
Chardonnay	6.4	1%	3%	192.4	-2%
Fume/Sauvignon Blanc	0.3	4%	1%	56.4	2%
Malbec	0.0	-90%	0%	17.3	-9%
Merlot	2.6	-10%	5%	56.6	-7%
Pinot Grigio/Pinot Gris	2.4	1%	3%	86.2	-2%
Pinot Noir	1.0	-19%	1%	74.5	2%
Riesling	0.2	-21%	1%	21.9	-6%
Syrah/Shiraz	4.5	-10%	37%	12.4	-8%
White Zinfandel	0.0	-5%	0%	14.6	-8%
Zinfandel	0.0	0%	0%	17.3	-7%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	896.8	0%	81%	10.5	-1%	85%
Italy	74.1	2%	7%	0.6	-2%	5%
France	38.5	3%	3%	0.2	-2%	2%
Australia	33.0	-2%	3%	0.5	-2%	4%
New Zealand	21.4	6%	2%	0.2	6%	1%
Spain	15.4	-22%	1%	0.1	-26%	1%
Argentina	13.5	-10%	1%	0.1	-8%	1%
Chile	4.9	-12%	0%	0.1	-2%	1%
Unknown	4.4	-11%	0%	0.0	-8%	0%
(Blank)	2.7	-12%	0%	0.0	-14%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	153.2	3%	237	-3%	0.7	-51%
Popular \$4.00 - \$7.99	380.0	-7%	637	-5%	68.6	-14%
Premium \$8.00 - \$10.99	412.0	-1%	393	-2%	18.5	8%
Super Premium \$11.00 - \$14.99	211.3	3%	301	5%	13.5	-13%
Ultra Premium \$15.00 - \$19.99	69.5	9%	85	0%	5.0	7%
Luxury \$20.00 - \$24.99	28.3	-1%	19	-2%	2.9	2%
Super Luxury \$25.00 Plus	15.0	1%	19	6%	0.7	-3%
Australia	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	56.1	-8%	104	0%	54.8	-13%
Premium \$8.00 - \$10.99	13.1	37%	2.1	3046%	3.9	376%
Super Premium \$11.00 - \$14.99	0.1	-14%	0.2	-27%	3.2	-22%
Ultra Premium \$15.00 - \$19.99	0.0	20%	0.01	-44%	0.1	-17%
Luxury \$20.00 - \$24.99	0.2	-22%	0.00	-87%	0.1	-1%
Super Luxury \$25.00 Plus	0.0	36%	0.01	-71%	0.3	-20%



# Wine Australia providing insights on Australian Wine

## Colorado Liquor Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

Australia				Total Market	
Total sales	Change (%)	Market share		Total sales	Change (%)
Volume (million cases)	0.2	-10%	4.0%	5.7	-5.4%
Value (million USD)	20	-7%	3.0%	661	-3.2%
Average price (USD/bottle equ.)	7.3	3.0%	na	9.6	2.3%

### Wine Sales - 12 Weeks to 1st of April 2018

Total sales	Change (%)	Market share		Total sales	Change (%)
Volume (million cases)	0.0	-8%	4.1%	1.2	-3.9%
Value (million USD)	4	-1%	3.2%	137	-0.6%
Average price (USD/bottle equ.)	7.6	7.3%	na	9.5	3.4%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.13	-5%	58%	5%	2.85	-5%	50%
Rosé	0.005	28%	2%	1%	0.37	12%	7%
White	0.089	-17%	39%	4%	2.10	-9%	37%
Sparkling	0.002	-24%	1%	0%	0.40	0%	7%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
Value \$0 - \$3.99	0.000	0%	0.0%	0.0%	0.27	-5%	7%
Popular \$4.00 - \$7.99	0.167	-14%	79.1%	17.6%	0.95	-13%	25%
Premium \$8.00 - \$10.99	0.026	85%	12.3%	2.4%	1.10	-9%	29%
Super Premium \$11.00 - \$14.99	0.011	-23%	5.1%	1.1%	0.95	-1%	25%
Ultra Premium \$15.00 - \$19.99	0.004	7%	1.9%	1.2%	0.33	7%	9%
Luxury \$20.00 - \$24.99	0.002	2%	0.8%	1.9%	0.09	6%	2%
Super Luxury \$25.00 Plus	0.001	7%	0.6%	1.9%	0.07	10%	2%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.09	2%	37%	3%	2.88	-5%	50%
Bottle (1.5L)	0.12	-14%	54%	18%	0.70	-11%	12%
Soft-pack	0.00	23%	1%	0%	1.49	-6%	26%
Can	0.02	-30%	7%	48%	0.03	43%	1%
Other	0.00	DNE	0.0%	0.0%	0.23	-3%	4%

### NOTES & DEFINITIONS

Prepared: May 2018  
Source: Information Resources Incorporated, X-Rates

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### Varietal

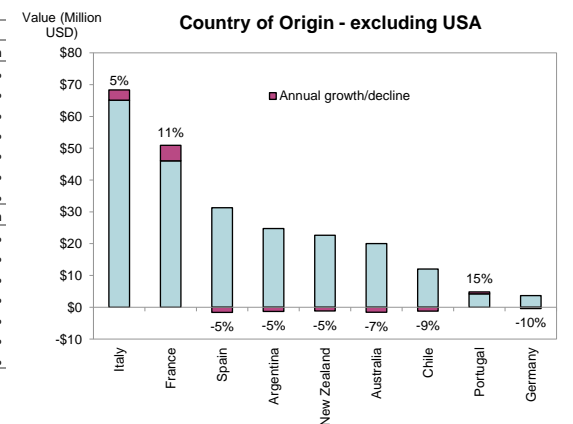
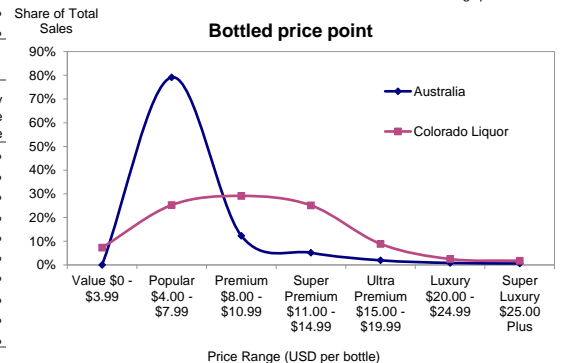
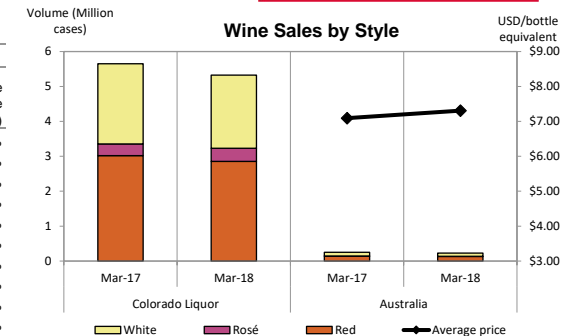
Australia				Total market	
Value (million USD)	Value change (%)	Australian value share		Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.4	34%	13%	2.9	16%
Cabernet Sauvignon	2.9	0%	3%	90.0	-5%
Chardonnay	3.5	-22%	4%	89.2	-9%
Fume/Sauvignon Blanc	0.5	-14%	1%	43.8	-5%
Malbec	0.0	-69%	0%	23.9	-7%
Merlot	1.2	-7%	6%	21.8	-16%
Pinot Grigio/Pinot Gris	1.2	-8%	3%	39.6	-6%
Pinot Noir	0.6	-8%	1%	54.6	1%
Riesling	0.3	-9%	3%	8.3	-12%
Syrah/Shiraz	2.9	-16%	38%	7.7	-7%
White Zinfandel	0.0	-33%	0%	5.2	-16%
Zinfandel	0.0	0%	0%	15.3	-13%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	415.1	-5%	63%	4.0	-7%	70%
Italy	68.3	5%	10%	0.5	3%	8%
France	50.9	11%	8%	0.3	8%	5%
Spain	31.3	-5%	5%	0.2	-5%	4%
Argentina	24.8	-5%	4%	0.2	-4%	3%
New Zealand	22.6	-5%	3%	0.1	-5%	2%
Australia	20.0	-7%	3%	0.2	-10%	4%
Chile	12.0	-9%	2%	0.1	-11%	2%
Portugal	4.8	15%	1%	0.0	11%	1%
Germany	3.7	-10%	1%	0.0	-8%	0%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	35.0	-5%	52	4%	0.3	-88%
Popular \$4.00 - \$7.99	114.8	-17%	183	-16%	17.9	-15%
Premium \$8.00 - \$10.99	145.2	-10%	132	-18%	11.0	11%
Super Premium \$11.00 - \$14.99	114.6	-10%	147	-5%	8.8	-15%
Ultra Premium \$15.00 - \$19.99	54.3	14%	51	-5%	5.0	32%
Luxury \$20.00 - \$24.99	15.2	-4%	13	10%	1.2	16%
Super Luxury \$25.00 Plus	13.6	8%	13	21%	0.8	-9%
Australia						
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	21.8	-11%	41	-20%	11.7	-26%
Premium \$8.00 - \$10.99	5.2	84%	1.5	68%	3.8	51%
Super Premium \$11.00 - \$14.99	0.5	-26%	0.8	14%	3.9	-40%
Ultra Premium \$15.00 - \$19.99	0.4	-30%	0.17	-15%	2.5	52%
Luxury \$20.00 - \$24.99	0.4	-27%	0.01	-57%	0.4	-22%
Super Luxury \$25.00 Plus	0.3	68%	0.00	0%	0.5	-2%



# Wine Australia providing insights on Australian Wine



## Georgia Liquor Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.2	0%	5.8%	2.8	-0.2%
Value (million USD)	11	0%	3.3%	342	1.3%
Average price (USD/bottle equ.)	5.8	0.1%	na	10.1	1.5%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.0	14%	6.5%	0.6	0.6%
Value (million USD)	3	8%	3.6%	75	3.1%
Average price (USD/bottle equ.)	5.4	-4.8%	na	10.0	2.5%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.07	-6%	44%	6%	1.16	0%	41%
Rosé	0.005	31%	3%	3%	0.19	9%	7%
White	0.086	4%	53%	7%	1.21	-2%	43%
Sparkling	0.001	-37%	1%	0%	0.26	3%	9%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	0%	0.0%	0.0%	0.24	-2%	11%
Popular \$4.00 - \$7.99	0.138	-4%	85.5%	16.9%	0.82	-5%	35%
Premium \$8.00 - \$10.99	0.015	54%	9.0%	3.1%	0.47	-2%	20%
Super Premium \$11.00 - \$14.99	0.006	19%	4.0%	1.4%	0.44	2%	19%
Ultra Premium \$15.00 - \$19.99	0.001	-6%	0.6%	0.4%	0.21	9%	9%
Luxury \$20.00 - \$24.99	0.000	34%	0.3%	0.7%	0.07	16%	3%
Super Luxury \$25.00 Plus	0.001	19%	0.6%	1.8%	0.06	0%	2%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.03	20%	21%	2%	1.42	2%	50%
Bottle (1.5L)	0.13	-4%	78%	17%	0.77	-6%	27%
Soft-pack	0.00	DNE	0%	0%	0.24	6%	8%
Can	0.00	DNE	0%	0%	0.00	91%	0%
Other	0.00	DNE	0.0%	0.0%	0.13	-5%	4%

### NOTES & DEFINITIONS

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### Varietal

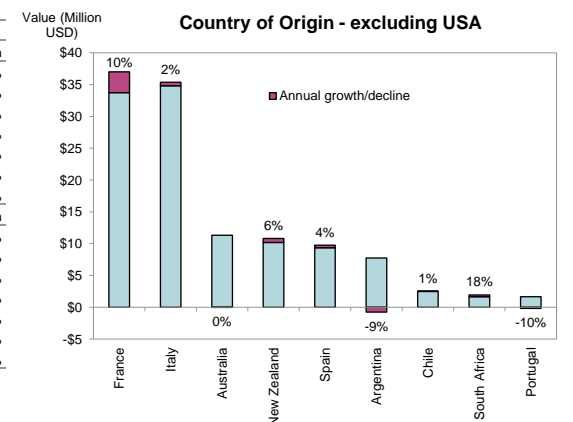
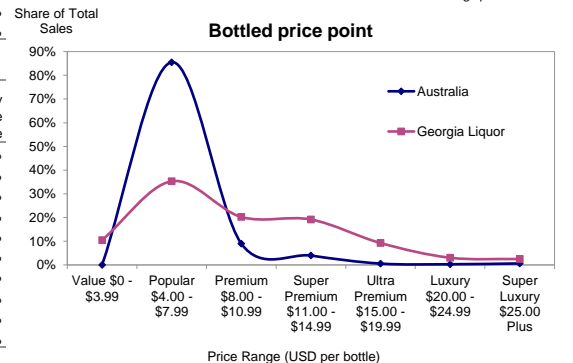
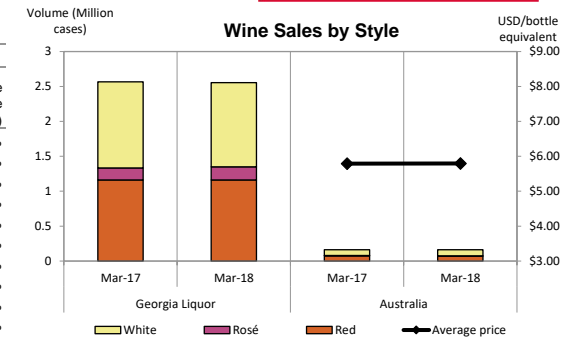
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.1	48%	4%	2.1	10%
Cabernet Sauvignon	1.5	0%	3%	50.1	2%
Chardonnay	3.4	-1%	5%	67.6	-1%
Fume/Sauvignon Blanc	0.1	13%	1%	18.9	4%
Malbec	0.0	0%	0%	6.7	-10%
Merlot	0.7	-10%	7%	10.4	-5%
Pinot Grigio/Pinot Gris	0.4	7%	2%	19.2	-2%
Pinot Noir	0.3	23%	1%	32.9	1%
Riesling	0.2	-16%	6%	3.3	-7%
Syrah/Shiraz	1.2	-3%	53%	2.2	2%
White Zinfandel	0.2	23%	5%	3.0	-7%
Zinfandel	0.0	0%	0%	4.1	-3%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	219.5	0%	64%	2.0	-1%	69%
France	37.0	10%	11%	0.1	11%	5%
Italy	35.4	2%	10%	0.3	0%	9%
Australia	11.3	0%	3%	0.2	0%	6%
New Zealand	10.8	6%	3%	0.1	6%	3%
Spain	9.8	4%	3%	0.1	3%	3%
Argentina	7.8	-9%	2%	0.1	-9%	2%
Chile	2.5	1%	1%	0.0	-2%	1%
South Africa	1.9	18%	1%	0.0	14%	1%
Portugal	1.7	-10%	0%	0.0	-11%	1%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
<b>Total Market</b>						
Value \$0 - \$3.99	20.4	13%	54	-7%	0.7	-69%
Popular \$4.00 - \$7.99	85.7	-10%	211	-10%	6.2	-25%
Premium \$8.00 - \$10.99	63.2	-6%	88	-5%	6.9	40%
Super Premium \$11.00 - \$14.99	63.5	1%	119	-2%	1.8	22%
Ultra Premium \$15.00 - \$19.99	42.2	17%	52	9%	1.0	3%
Luxury \$20.00 - \$24.99	16.3	31%	14	24%	0.1	104%
Super Luxury \$25.00 Plus	13.9	-4%	19	-5%	0.8	15%
<b>Australia</b>	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	18.8	-10%	53	-5%	5.8	-26%
Premium \$8.00 - \$10.99	2.2	117%	0.6	696%	1.8	56%
Super Premium \$11.00 - \$14.99	0.1	3%	2.6	27%	1.1	-6%
Ultra Premium \$15.00 - \$19.99	0.1	3%	0.02	-17%	0.6	-14%
Luxury \$20.00 - \$24.99	0.1	-55%	0.01	8%	0.0	3%
Super Luxury \$25.00 Plus	0.1	80%	0.00	0%	0.7	36%



# Wine Australia providing insights on Australian Wine

## Massachusetts Liquor Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.4	-8%	5.2%	8.6	1.3%
Value (million USD)	36	-8%	3.9%	930	4.6%
Average price (USD/bottle equ.)	6.7	0.1%	na	9.0	3.3%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.1	2%	5.6%	1.8	1.6%
Value (million USD)	8	4%	4.4%	195	6.7%
Average price (USD/bottle equ.)	6.8	2.6%	na	8.9	5.0%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.23	-6%	51%	6%	3.65	1%	42%
Rosé	0.010	14%	2%	2%	0.64	3%	7%
White	0.206	-10%	46%	5%	3.83	1%	45%
Sparkling	0.004	-12%	1%	1%	0.48	6%	6%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	0%	0.0%	0.0%	0.52	-14%	8%
Popular \$4.00 - \$7.99	0.376	-13%	85.6%	13.7%	2.75	-4%	40%
Premium \$8.00 - \$10.99	0.036	68%	8.1%	2.4%	1.46	2%	21%
Super Premium \$11.00 - \$14.99	0.020	44%	4.5%	1.4%	1.42	15%	21%
Ultra Premium \$15.00 - \$19.99	0.004	-7%	0.9%	0.9%	0.46	20%	7%
Luxury \$20.00 - \$24.99	0.002	1%	0.4%	1.2%	0.16	20%	2%
Super Luxury \$25.00 Plus	0.002	6%	0.4%	2.2%	0.08	14%	1%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.14	-5%	31%	3%	3.95	6%	46%
Bottle (1.5L)	0.30	-8%	68%	13%	2.31	-3%	27%
Soft-pack	0.00	7%	0%	0%	1.22	-4%	14%
Can	0.00	-58%	1%	14%	0.02	29%	0%
Other	0.00	DNE	0.0%	0.0%	0.62	-7%	7%

### NOTES & DEFINITIONS

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### Varietal

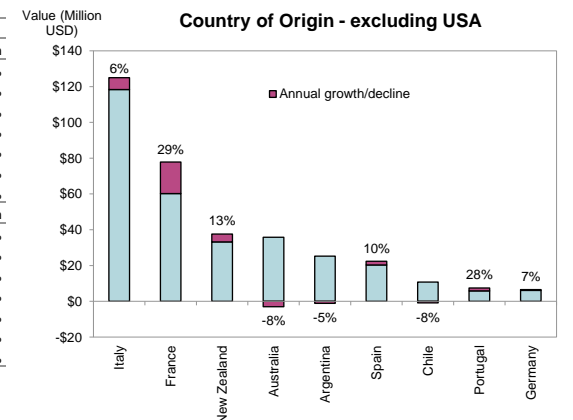
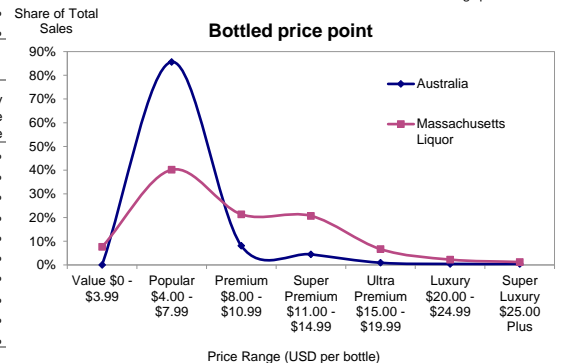
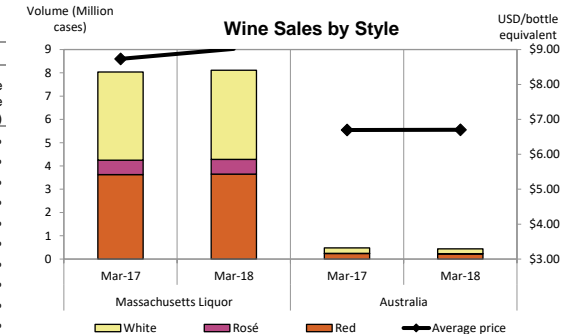
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.7	13%	14%	5.0	-6%
Cabernet Sauvignon	4.4	-4%	3%	138.2	7%
Chardonnay	6.6	-13%	4%	150.8	3%
Fume/Sauvignon Blanc	2.0	-17%	3%	69.9	7%
Malbec	0.0	-44%	0%	17.6	-6%
Merlot	2.3	-19%	6%	37.1	-5%
Pinot Grigio/Pinot Gris	3.4	-6%	4%	87.1	-1%
Pinot Noir	1.5	-14%	2%	73.1	6%
Riesling	0.6	-22%	4%	15.0	0%
Syrah/Shiraz	4.5	-5%	66%	6.8	-4%
White Zinfandel	0.0	-2%	0%	13.7	-8%
Zinfandel	0.0	0%	0%	13.8	-6%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	571.6	2%	61%	5.8	-1%	68%
Italy	125.0	6%	13%	1.0	6%	12%
France	77.8	29%	8%	0.4	34%	4%
New Zealand	37.6	13%	4%	0.3	15%	3%
Australia	35.8	-8%	4%	0.4	-8%	5%
Argentina	25.2	-5%	3%	0.2	-4%	2%
Spain	22.3	10%	2%	0.2	7%	2%
Chile	10.7	-8%	1%	0.1	0%	2%
Portugal	7.4	28%	1%	0.1	11%	1%
Germany	6.6	7%	1%	0.1	6%	1%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	42.9	-10%	65	-8%	0.8	-39%
Popular \$4.00 - \$7.99	260.1	-6%	563	-1%	27.5	-21%
Premium \$8.00 - \$10.99	203.9	2%	218	-3%	9.4	15%
Super Premium \$11.00 - \$14.99	223.6	18%	301	6%	12.1	6%
Ultra Premium \$15.00 - \$19.99	94.2	18%	99	24%	2.3	32%
Luxury \$20.00 - \$24.99	27.4	23%	19	22%	0.7	29%
Super Luxury \$25.00 Plus	20.9	7%	14	25%	1.3	6%
Australia	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	43.4	-11%	93	-12%	25.2	-17%
Premium \$8.00 - \$10.99	8.4	75%	2.2	219%	4.9	33%
Super Premium \$11.00 - \$14.99	0.3	56%	0.6	-24%	8.0	7%
Ultra Premium \$15.00 - \$19.99	0.2	188%	0.38	15%	1.2	1%
Luxury \$20.00 - \$24.99	0.2	3%	0.01	-72%	0.3	18%
Super Luxury \$25.00 Plus	0.1	-25%	0.01	-54%	1.1	13%



# Wine Australia providing insights on Australian Wine



## New Jersey Liquor Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.5	0%	4.8%	10.7	-1.7%
Value (million USD)	45	0%	3.6%	1,221	0.0%
Average price (USD/bottle equ.)	7.2	0.0%	na	9.5	1.7%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.1	6%	5.4%	2.2	-1.1%
Value (million USD)	10	6%	4.1%	246	4.2%
Average price (USD/bottle equ.)	7.2	0.0%	na	9.5	5.4%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.30	0%	59%	6%	5.09	-3%	48%
Rosé	0.009	5%	2%	1%	0.78	4%	7%
White	0.199	0%	38%	5%	4.23	-2%	40%
Sparkling	0.005	-11%	1%	1%	0.59	2%	6%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	0%	0.0%	0.0%	1.12	-8%	13%
Popular \$4.00 - \$7.99	0.445	-4%	87.1%	13.2%	3.37	-3%	38%
Premium \$8.00 - \$10.99	0.046	97%	8.9%	2.5%	1.82	-1%	21%
Super Premium \$11.00 - \$14.99	0.012	-20%	2.3%	0.9%	1.40	1%	16%
Ultra Premium \$15.00 - \$19.99	0.004	-30%	0.8%	0.7%	0.60	3%	7%
Luxury \$20.00 - \$24.99	0.002	-19%	0.3%	0.6%	0.28	2%	3%
Super Luxury \$25.00 Plus	0.003	-20%	0.5%	1.3%	0.21	-6%	2%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.15	3%	30%	3%	4.92	-1%	46%
Bottle (1.5L)	0.36	-1%	69%	12%	2.94	-2%	27%
Soft-pack	0.00	23%	0%	0%	1.28	-1%	12%
Can	0.00	-38%	0%	6%	0.03	35%	0%
Other	0.00	DNE	0.0%	0.0%	0.94	-6%	9%

### NOTES & DEFINITIONS

Prepared: May 2018  
Source: Information Resources Incorporated, X-Rates

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### Varietal

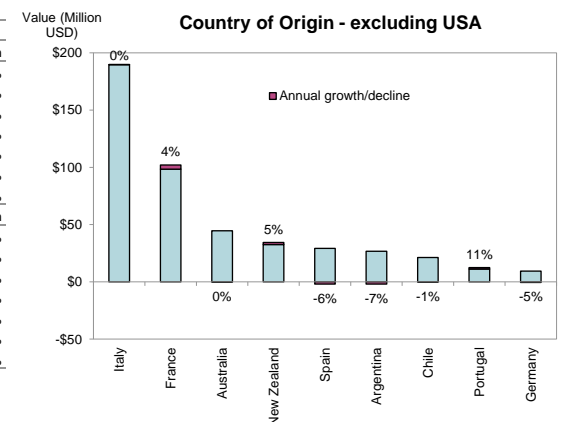
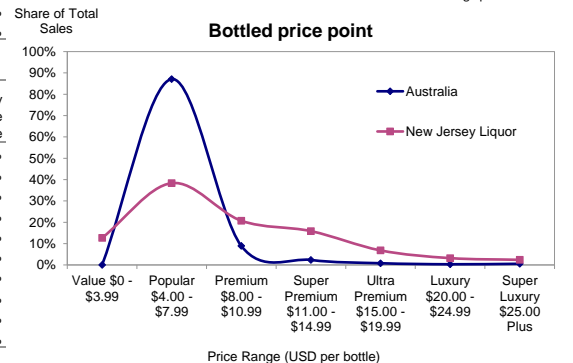
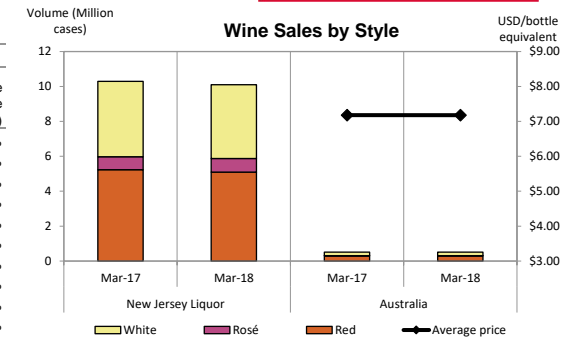
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.5	6%	8%	6.8	6%
Cabernet Sauvignon	6.8	10%	3%	206.2	0%
Chardonnay	6.7	0%	5%	147.6	-2%
Fume/Sauvignon Blanc	1.5	19%	2%	74.1	6%
Malbec	0.0	-85%	0%	22.1	-6%
Merlot	3.7	-11%	7%	51.8	-3%
Pinot Grigio/Pinot Gris	4.5	2%	4%	120.3	-1%
Pinot Noir	1.8	-3%	2%	92.0	2%
Riesling	0.7	-17%	4%	17.1	-6%
Syrah/Shiraz	5.2	-14%	65%	8.0	-13%
White Zinfandel	0.1	4%	1%	15.6	-6%
Zinfandel	0.0	0%	0%	13.7	-5%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	736.5	0%	60%	7.1	-2%	66%
Italy	189.9	0%	16%	1.4	-1%	14%
France	102.0	4%	8%	0.4	4%	4%
Australia	44.6	0%	4%	0.5	0%	5%
New Zealand	34.4	5%	3%	0.2	4%	2%
Spain	29.2	-6%	2%	0.2	-6%	2%
Argentina	26.7	-7%	2%	0.2	-7%	2%
Chile	21.2	-1%	2%	0.3	3%	2%
Portugal	12.4	11%	1%	0.2	9%	2%
Germany	9.4	-5%	1%	0.1	-6%	1%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	105.0	-10%	104	-5%	2.1	-21%
Popular \$4.00 - \$7.99	411.7	-3%	461	-1%	35.2	-16%
Premium \$8.00 - \$10.99	277.9	-1%	187	-4%	11.5	13%
Super Premium \$11.00 - \$14.99	271.9	6%	216	-3%	9.1	-2%
Ultra Premium \$15.00 - \$19.99	130.8	10%	110	0%	3.6	-34%
Luxury \$20.00 - \$24.99	43.4	-1%	25	-5%	0.4	-29%
Super Luxury \$25.00 Plus	48.1	-15%	36	-5%	2.1	-31%
Australia	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	65.0	0%	83	-1%	31.3	-14%
Premium \$8.00 - \$10.99	11.0	112%	2.6	333%	5.3	28%
Super Premium \$11.00 - \$14.99	1.0	3%	0.6	-53%	5.0	-2%
Ultra Premium \$15.00 - \$19.99	0.4	-42%	0.21	3%	2.3	-37%
Luxury \$20.00 - \$24.99	0.7	-20%	0.02	-69%	0.2	-43%
Super Luxury \$25.00 Plus	0.2	-22%	0.02	-38%	1.7	-15%



# Wine Australia providing insights on Australian Wine



## New York Liquor Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.6	-5%	5.6%	11.2	-2.1%
Value (million USD)	47	-3%	3.5%	1,346	-1.1%
Average price (USD/bottle equ.)	6.3	2.7%	na	10.1	0.9%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.1	-1%	5.9%	2.3	2.2%
Value (million USD)	11	3%	3.9%	274	3.3%
Average price (USD/bottle equ.)	6.4	3.7%	na	9.7	1.0%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.40	-4%	64%	7%	5.47	-2%	49%
Rosé	0.009	0%	1%	1%	0.71	6%	6%
White	0.207	-8%	33%	5%	4.20	-4%	38%
Sparkling	0.008	5%	1%	1%	0.77	-2%	7%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
Value \$0 - \$3.99	0.000	0%	0.0%	0.0%	0.78	-2%	8%
Popular \$4.00 - \$7.99	0.546	-11%	88.7%	15.1%	3.61	-5%	38%
Premium \$8.00 - \$10.99	0.052	145%	8.4%	2.7%	1.91	-1%	20%
Super Premium \$11.00 - \$14.99	0.010	-2%	1.6%	0.6%	1.79	1%	19%
Ultra Premium \$15.00 - \$19.99	0.002	-15%	0.3%	0.3%	0.71	3%	8%
Luxury \$20.00 - \$24.99	0.003	85%	0.5%	0.9%	0.38	8%	4%
Super Luxury \$25.00 Plus	0.002	-19%	0.4%	1.1%	0.22	0%	2%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.18	18%	29%	3%	5.43	0%	49%
Bottle (1.5L)	0.43	-13%	70%	14%	3.20	-5%	29%
Soft-pack	0.00	-78%	0%	0%	0.99	-4%	9%
Can	0.00	27%	0%	2%	0.01	38%	0%
Other	0.00	DNE	0.0%	0.0%	0.77	-3%	7%

### NOTES & DEFINITIONS

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### Varietal

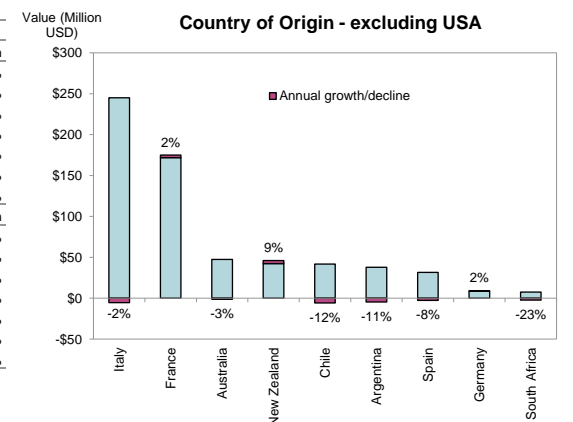
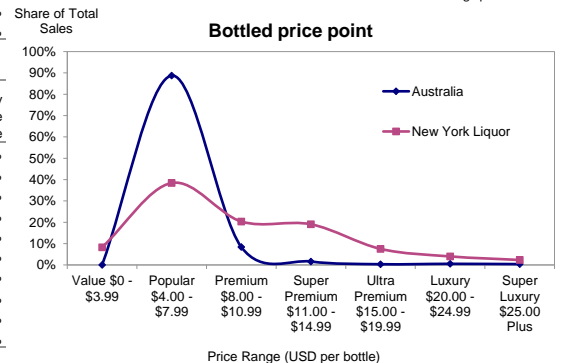
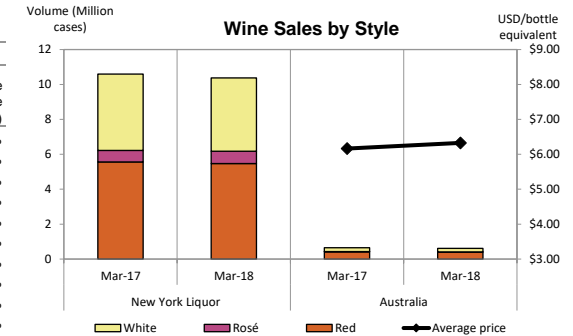
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.4	-7%	8%	4.8	-2%
Cabernet Sauvignon	7.2	23%	3%	243.1	4%
Chardonnay	9.5	-6%	6%	155.6	-3%
Fume/Sauvignon Blanc	0.6	-33%	1%	86.7	0%
Malbec	0.0	0%	0%	30.7	-10%
Merlot	6.1	-12%	10%	63.9	-6%
Pinot Grigio/Pinot Gris	2.6	-4%	2%	119.7	-4%
Pinot Noir	1.4	-14%	2%	82.9	0%
Riesling	0.3	-6%	2%	14.1	-1%
Syrah/Shiraz	7.2	-7%	72%	10.0	-9%
White Zinfandel	0.2	2%	1%	13.8	-7%
Zinfandel	0.0	0%	0%	10.9	1%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	686.5	0%	51%	6.2	-1%	56%
Italy	245.1	-2%	18%	2.0	-3%	18%
France	174.9	2%	13%	0.7	3%	7%
Australia	47.4	-3%	4%	0.6	-5%	6%
New Zealand	46.1	9%	3%	0.3	9%	3%
Chile	41.7	-12%	3%	0.6	-10%	5%
Argentina	37.7	-11%	3%	0.3	-11%	2%
Spain	31.5	-8%	2%	0.2	-8%	2%
Germany	8.7	2%	1%	0.1	3%	1%
South Africa	7.5	-23%	1%	0.1	-22%	1%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
<b>Total Market</b>						
Value \$0 - \$3.99	78.3	15%	73	0%	0.0	50%
Popular \$4.00 - \$7.99	508.9	-3%	545	-4%	66.8	-7%
Premium \$8.00 - \$10.99	353.0	8%	200	-7%	10.9	-12%
Super Premium \$11.00 - \$14.99	352.7	10%	270	1%	13.3	-6%
Ultra Premium \$15.00 - \$19.99	151.4	5%	109	-2%	2.7	-11%
Luxury \$20.00 - \$24.99	69.3	19%	33	-5%	0.7	-18%
Super Luxury \$25.00 Plus	58.7	-5%	32	-5%	1.8	-13%
<b>Australia</b>	000 cases	Growth	000 cases	Growth	000 cases	Growth
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	69.0	-5%	144	-5%	66.2	-6%
Premium \$8.00 - \$10.99	11.2	240%	1.4	92%	5.7	-4%
Super Premium \$11.00 - \$14.99	0.3	-21%	0.2	-45%	5.7	11%
Ultra Premium \$15.00 - \$19.99	0.3	393%	0.12	-35%	1.0	-32%
Luxury \$20.00 - \$24.99	1.9	273%	0.00	0%	0.3	-34%
Super Luxury \$25.00 Plus	0.5	1%	0.00	0%	1.4	-22%





# Wine Australia providing insights on Australian Wine



## Texas Liquor Channel Wine Sales - MAT to 1st of April 2018

Exchange rate May 2018 (USD:AUD): 1.33

### Total Wine Sales Overview

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.0	-18%	2.3%	0.3	-7.5%
Value (million USD)	1	-13%	1.6%	40	-1.4%
Average price (USD/bottle equ.)	8.4	6.0%	na	12.0	6.6%

### Wine Sales - 12 Weeks to 1st of April 2018

	Australia			Total Market	
	Total sales	Change (%)	Market share	Total sales	Change (%)
Volume (million cases)	0.0	-9%	2.3%	0.1	-1.1%
Value (million USD)	0	-2%	1.7%	9	4.0%
Average price (USD/bottle equ.)	8.9	8.0%	na	12.2	5.1%

### Winestyle

	Sales (million cases)	Change (%)	Winestyle share	Australian share of winestyle	Sales (million cases)	Change (%)	Winestyle share
Red	0.00	-14%	62%	3%	0.13	-8%	46%
Rosé	0.000	-36%	0%	0%	0.02	-8%	6%
White	0.002	-24%	35%	2%	0.10	-7%	36%
Sparkling	0.000	-24%	2%	0%	0.03	-6%	11%

### Price point (Bottled still wine)

	Sales (million cases)	Change (%)	Segment share	Australian share of segment	Sales (million cases)	Change (%)	Price point share
USD per bottle equivalent							
Value \$0 - \$3.99	0.000	0%	0.2%	0.1%	0.02	-28%	8%
Popular \$4.00 - \$7.99	0.004	-25%	69.5%	8.4%	0.05	-14%	24%
Premium \$8.00 - \$10.99	0.001	26%	19.2%	2.3%	0.05	-6%	24%
Super Premium \$11.00 - \$14.99	0.000	-24%	5.7%	0.8%	0.05	-3%	22%
Ultra Premium \$15.00 - \$19.99	0.000	-15%	1.9%	0.4%	0.03	0%	12%
Luxury \$20.00 - \$24.99	0.000	-31%	0.9%	0.5%	0.01	-3%	5%
Super Luxury \$25.00 Plus	0.000	-16%	2.6%	1.3%	0.01	7%	6%

### Container Type

	Sales (million cases)	Change (%)	Container type share	Australian share of container type	Sales (million cases)	Change (%)	Container type share
Bottle (750ML)	0.00	-6%	50%	2%	0.16	-6%	59%
Bottle (1.5L)	0.00	-28%	47%	8%	0.04	-16%	14%
Soft-pack	0.00	-50%	0%	0%	0.03	-5%	11%
Can	0.00	-48%	0%	5%	0.00	60%	0%
Other	0.00	DNE	0.0%	0.0%	0.01	-6%	4%

### NOTES & DEFINITIONS

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### Varietal

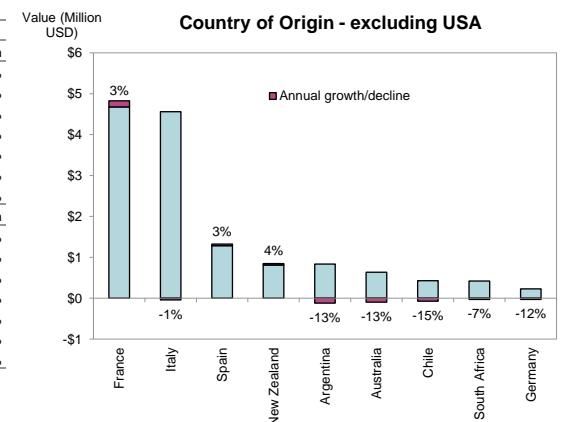
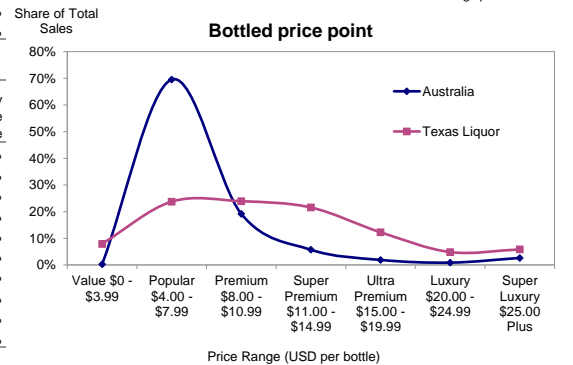
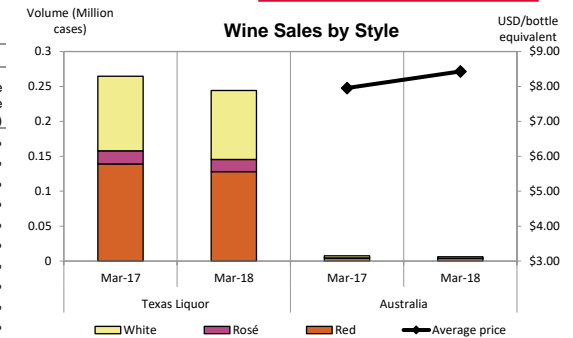
	Australia			Total market	
	Value (million USD)	Value change (%)	Australian value share	Value (million USD)	Value change (%)
Blush Moscato/Muscat	0.0	-25%	2%	0.1	-11%
Cabernet Sauvignon	0.1	-2%	1%	8.0	2%
Chardonnay	0.1	-23%	2%	5.6	-5%
Fume/Sauvignon Blanc	0.0	-27%	0%	1.8	-1%
Malbec	0.0	0%	0%	0.8	-8%
Merlot	0.0	-18%	3%	1.3	-6%
Pinot Grigio/Pinot Gris	0.0	-5%	1%	1.8	2%
Pinot Noir	0.0	-17%	0%	3.1	4%
Riesling	0.0	-28%	0%	0.4	-10%
Syrah/Shiraz	0.2	-21%	55%	0.3	-18%
White Zinfandel	0.0	-81%	0%	0.3	-19%
Zinfandel	0.0	0%	0%	0.7	-8%

### Country of Origin

	Value (million USD)	Value change (%)	Country value share	Volume (million cases)	Volume change (%)	Country volume share
USA	25.3	-1%	64%	0.2	-8%	67%
France	4.8	3%	12%	0.0	2%	7%
Italy	4.6	-1%	11%	0.0	-5%	12%
Spain	1.3	3%	3%	0.0	-3%	4%
New Zealand	0.8	4%	2%	0.0	2%	2%
Argentina	0.8	-13%	2%	0.0	-16%	2%
Australia	0.6	-13%	2%	0.0	-18%	2%
Chile	0.4	-15%	1%	0.0	-21%	2%
South Africa	0.4	-7%	1%	0.0	-12%	1%
Germany	0.2	-12%	1%	0.0	-11%	1%

### Varietal by Price Point (bottled)

	Cabernet Sauvignon		Chardonnay		Syrah/Shiraz	
	000 cases	Growth	000 cases	Growth	000 cases	Growth
Total Market						
Value \$0 - \$3.99	1.3	-13%	3	-16%	0.0	-50%
Popular \$4.00 - \$7.99	5.7	-21%	11	-11%	0.9	-33%
Premium \$8.00 - \$10.99	8.7	-7%	7	-7%	0.5	-3%
Super Premium \$11.00 - \$14.99	7.6	-8%	8	-13%	0.3	-22%
Ultra Premium \$15.00 - \$19.99	6.6	0%	5	-7%	0.1	-6%
Luxury \$20.00 - \$24.99	2.2	-7%	2	-17%	0.0	-13%
Super Luxury \$25.00 Plus	4.2	11%	3	3%	0.1	-12%
Australia						
Value \$0 - \$3.99	0.0	0%	0	0%	0.0	0%
Popular \$4.00 - \$7.99	0.5	-27%	1	-27%	0.7	-27%
Premium \$8.00 - \$10.99	0.2	282%	0.0	14%	0.1	9%
Super Premium \$11.00 - \$14.99	0.0	-18%	0.0	20%	0.1	-40%
Ultra Premium \$15.00 - \$19.99	0.0	-6%	0.04	-38%	0.0	3%
Luxury \$20.00 - \$24.99	0.0	-58%	0.00	0%	0.0	-38%
Super Luxury \$25.00 Plus	0.0	-39%	0.00	0%	0.1	-10%



# Definitions and Explanations

**Grocery:** Grocery stores and supercentres with grocery sales over US\$2 million pa

**Drug:** Drugstore is a common American term for a pharmacy. Drugstores sell not only medicines, but also miscellaneous items such as candy, cosmetics, magazines and alcohol beverages including wine, as well as light refreshments.

**Convenience:** is a small store (from 800 to 3,000 sq. ft.) that sells items such as candy, ice-cream, soft drinks, lottery tickets, alcohol beverages (including wine) and newspapers. Could also be part of a service station

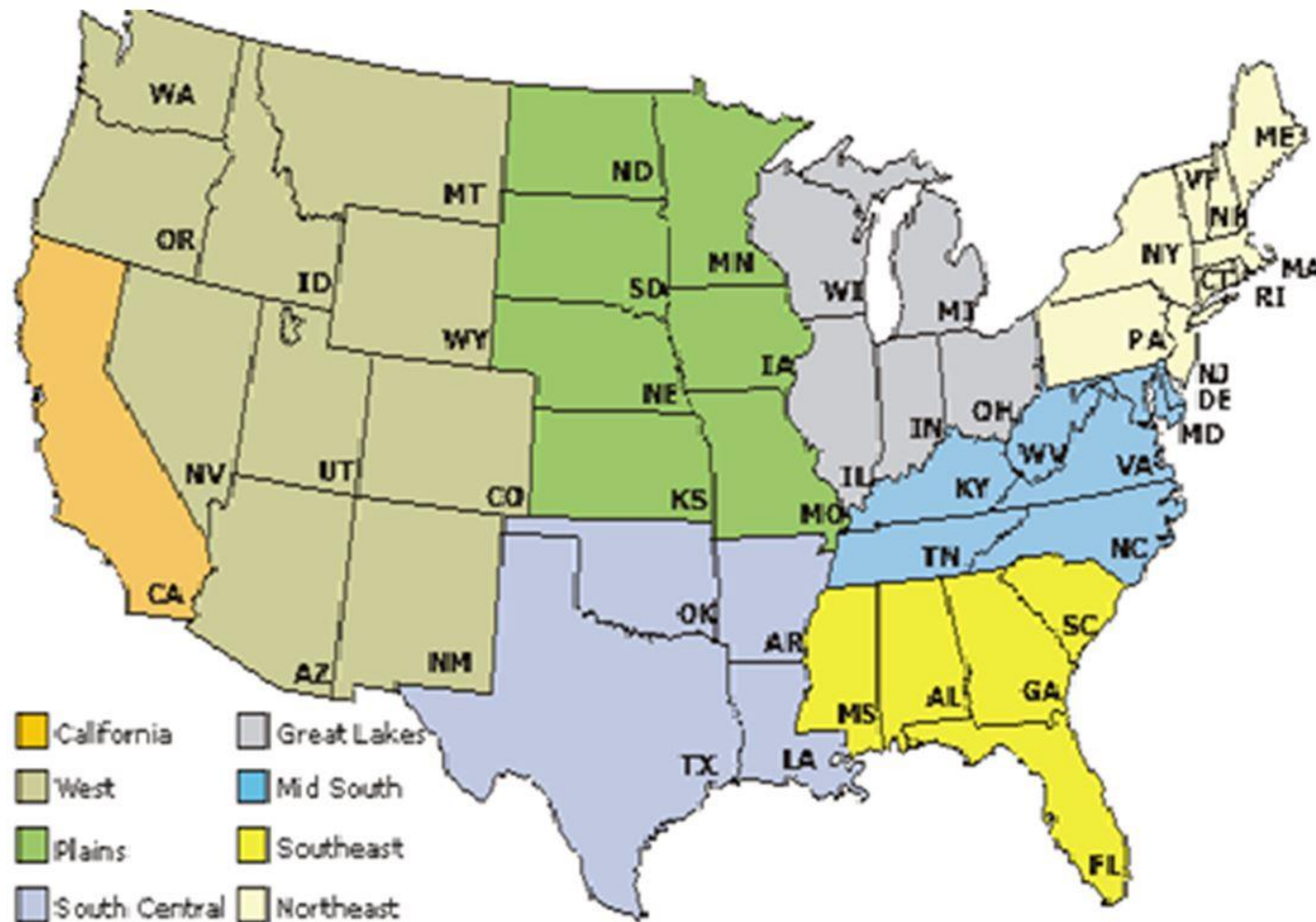
**Liquor:** Stores in which liquor is the major commodity sold – with IRI's coverage accounting for 62% of the channel. In turn, the Wine Australia purchases of IRI data give an estimated 52% coverage of the channel.

**Control state:** States in which the state government is the sole wholesaler of alcohol beverages (18 mainland states<sup>1</sup> in total). Note that government wholesaling does not preclude the existence of any of the different channel formats (see next page for a breakdown).

**License state:** States where the state government does not participate in the sale of alcohol beverages but issues licenses to sell alcohol (31 mainland states in total).



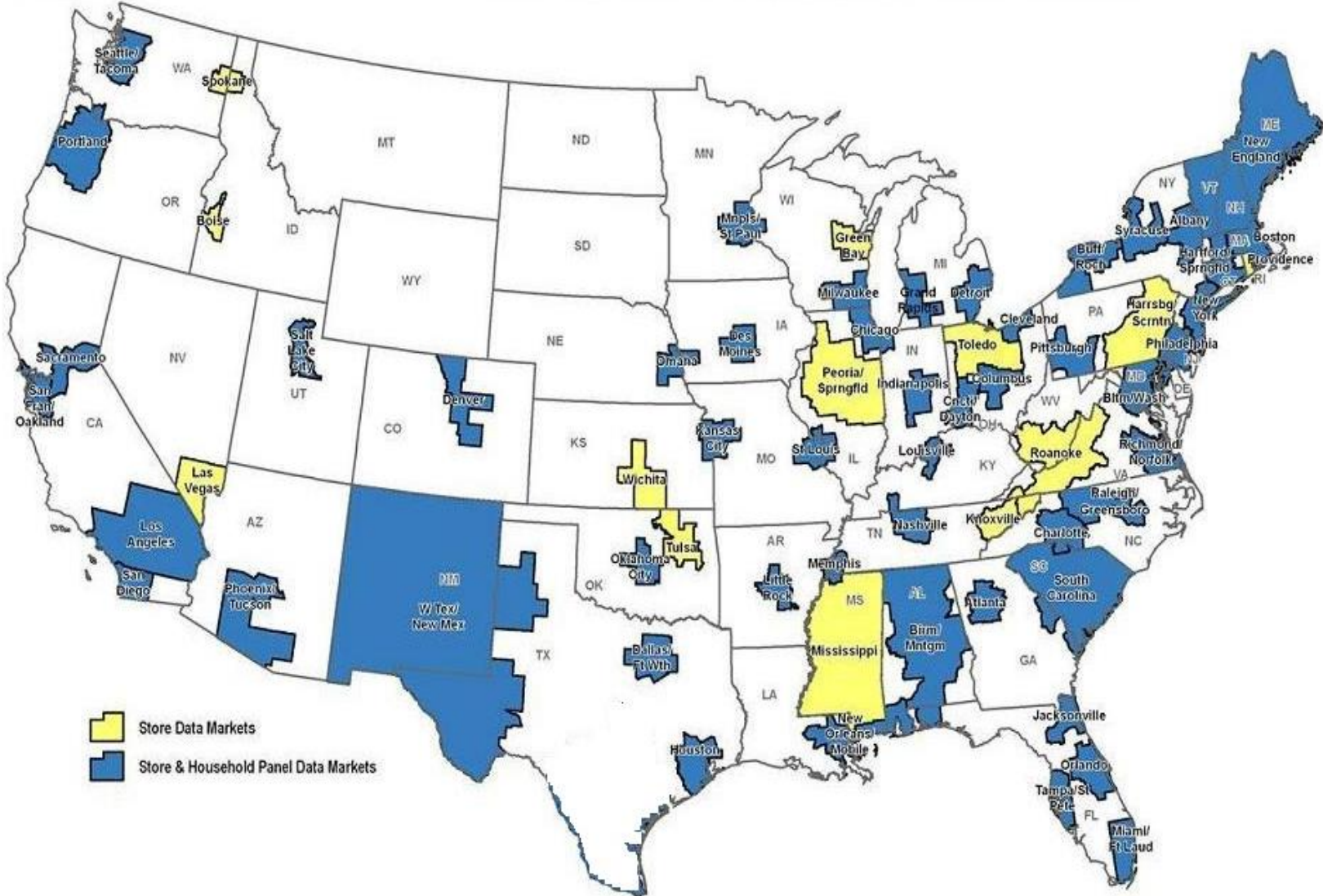
# IRI Regions



AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CN	Connecticut
CO	Colorado
DL	Delaware
FL	Florida
GA	Georgia
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
ME	Maine
MI	Michigan
MN	Minnesota
MO	Missouri
MS	Mississippi
MT	Montana
MY	Maryland
NC	North Carolina
ND	North Dakota
NE	Nebraska
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
RI	Rhode Is
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming

## Data collection methodology

Highlighted below are the areas in which IRI collects store scan data. In a particular market, IRI will collect a census of participating chains' scan data then use a sample based method from scan data to estimate wine sales of chains and stores which don't or do not fully participate.



# Data coverage summary

## Census Integrated Sample Captures 78% of ACV Before Projection

	PROJECTED OUTLETS				CENSUS BASED OUTLETS					
	Grocery	Drug	Mass Merchandiser	AllScan Convenience	Walmart	Club	Dollar	Military	Liquor	Pet Specialty
<b>Universe Definition (within contiguous U.S.)</b>	32,900+ stores \$2MM+ grocery stores	42,000+ stores -Entire outlet -Non-Rx ACV	Target, Shopko, Kmart (excludes Walmart) - stores	148,400+ stores - Chains & independents - NACS / TD definition - Non-gas ACV	Supercenters, Division 1 / Traditional, and Neighborhood Markets	Offerings covering BJ's, Sam's Club and Costco (CRX)	Offerings covering Family Dollar, Fred's, and Dollar General	All locations operated by the Defense Commissary Agency (DeCA), Navy Exchanges (NEXCOM)	Entire Liquor channel in 9 states and markets	Census level reporting for Petco
<b>Volumetric Sample</b>	14,300+	19,700+	3,200+	19,200+	3,900+	1,200+	18,600+	500+	4,000+	1,100+
<b>% ACV Represented by Census</b>	72%	92%	100%	15%	100%	100%	100%	100%	100%	100%
<b>% Coverage: Entire outlet</b>	95%	100%	100%	100%	100%	95%	80%	45%	40%	21%
<b>% Coverage: SymphonyIRI defined outlet</b>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Causal Sample</b>	2,800+	800+	600+	1,700+	450+	80+	N/A	60+	N/A	60+

\*Includes direct winery sales and internet sales

\*\* Wine Australia estimate based on IRI's estimate of total off-trade wine sales  
ACV – Actual cash value

# Retailers included in IRI's data collection

(chains with over 1% market share in a region)

Note: Wine Australia has not purchased IRI's total capability – see explanations throughout the report for reporting coverage

California	West	Plains	South Central	Great Lakes	Mid-South	Southeast	Northeast
Grocery							
Albertsons Grocery All Other Bel Air C & S Wholesale Supplied Stores Food 4 Less/Foods Co Foodmaxx Raleys Ralphs Safeway Save Mart Smart & Final Stater Brothers Superior Super Warehouse Trader Joes Unified Western Grocers Supplied Stores Vons Whole Foods	Affiliated Food Supplied Stores Albertsons Grocery All Other Associated Food Supplied Stores Bashas/Food City City Markets Excell Food Fred Meyer Fry'S Food Store King Soopers Quality Food Center Safeway Smiths Food Supervalu Supplied Stores Unified Western Grocers Supplied Stores Walmart Whole Foods	Affiliated Food Supplied Stores Aldi Grocery All Other Awg Supplied Stores Bakers Supermarket Cub Foods Dierbergs Dillons Fareway Stores Hy Vee Iga Nash Finch Supplied Stores Price Chopper Rainbow Schnuck Markets Shop N Save Supervalu Supplied Stores	Affiliated Food Supplied Stores Albertsons Grocery All Other Associated Grocers Supplied Stores Awg Supplied Stores Brookshire Brothers Brookshire Foods Fiesta Mart Grocers Supply Supplied Stores H E Butt Homeland Iga Kroger Randalls Tom Thumb United Supermarkets Winn Dixie	Grocery All Other Central Grocers Supplied Stores Certified Grocers Supplied Stores Dominicks Giant Eagle Iga Jewel/Jewel-Osco Kroger Marsh Meijer Nash Finch Supplied Stores Pick N Save Piggly Wiggly Save A Lot Schnuck Markets Spartan Supplied Stores Supervalu Supplied Stores	A & P Grocery All Other Awg Supplied Stores Bi Lo Farm Fresh Food City Food Lion Giant Food (Landover Md) Harris Teeter Iga Ingles Market Kroger Lowes Martins Safeway Save A Lot Shoppers Food Supervalu Supplied Stores Ukrops	Grocery All Other Associated Grocers Supplied Stores Bi Lo Brunos Food Lion Harveys Ingles Market Kroger Piggly Wiggly Publix Supervalu Supplied Stores Sweetbay Winn Dixie	A & P/Pathmark Acme Market Affiliated Food Supplied Stores Grocery All Other Big Y Demoulas/Market Basket Giant Eagle Giant Food (Carlisle Pa) Hannaford Price Chopper Shaws Shoprite Stop & Shop Supervalu Supplied Stores Tops Markets Waldbaums Wegmans Weis Markets Whole Foods
Drug							
Drug All Other Cvs/Longs Rite Aid Walgreens	Drug All Other Bartell Cvs/Longs Rite Aid Walgreens	Drug All Other Cvs Hy Vee Drug Snyders Thrifty-White Walgreens	Drug All Other Cvs Rite Aid Snyders Walgreens	Drug All Other Cvs Marcs Rite Aid Walgreens	Drug All Other Cvs Kerr Inc. Rite Aid Walgreens	Drug All Other Cvs Rite Aid Walgreens	Drug All Other Cvs Duane Reade Rite Aid Walgreens
Mass							
Mass Merchandiser All Other Kmart Target Target Supercenters	Mass Merchandiser All Other Kmart Kmart Supercenters Shopko Target Target Supercenters	Mass Merchandiser All Other Kmart Pamida Shopko Target Target Supercenters	Mass Merchandiser All Other Kmart Target Target Supercenters	Mass Merchandiser All Other Kmart Kmart Supercenters Pamida Shopko Target Target Supercenters Valu City	Mass Merchandiser All Other Kmart Kmart Supercenters Roses Target Target Supercenters Valu City	Mass Merchandiser All Other Kmart Target Target Supercenters	Mass Merchandiser All Other Kmart Target Valu City
Convenience							
Bp/East Region Chevrontexaco Corp Circle K Conocophillips Global Hq G & M Oil Co Inc Tesoro Northshore Ventures Turkey Hill Minit Market 7 Eleven Convenience Independent	Circle K Conocophillips Global Hq G&S Oil Co Giant Industries Inc Jacksons Food Stores Inc Maverik Country Stores Inc Terrible Herbst Inc Turkey Hill Minit Market Valero Energy Corp/Dallas Div 7 Eleven Convenience Independent	Caseys General Stores Inc Holiday Cos Inc Krause Gentle Corp Kwik Trip Inc Quiktrip Corp/Des Moines Div Speedway Superamerica Llc Turkey Hill Minit Market 7 Eleven Convenience Independent	Allsups Conv Stores Inc Circle K E Z Mart Stores Inc Exxon Mobil Fuel Mktg/Arizona Loves Country Stores Inc Southwest Conv Stores Inc Ssp/Border To Border Div Valero Energy Corp/Dallas Div 7 Eleven Convenience Independent	Bp/East Region Caseys General Stores Inc Circle K Kwik Trip Inc Meijer Convenience Stores Speedway Superamerica Llc United Dairy Farmers 7 Eleven Convenience Independent	Circle K Clarks Pump N Shop Fas Mart Convenience Stores Mapco Express/Discount Food Mart Pantry Inc Sheetz Inc Speedway Superamerica Llc Wawa Inc Wilcohes Llc 7 Eleven Convenience Independent	Amerada Hess/Upstate Ny Div Circle K Pantry Inc Racetrac/Gulf Div Worsley Companies Corp 7 Eleven Convenience Independent	Amerada Hess/Upstate Ny Div Circle K Cumberland Farms/Northeast Kwik Fill Red Apple Div Quick Chek Food Stores Sheetz Inc Stewarts Shops Corp Sunoco Inc Turkey Hill Minit Market Wawa Inc Wilson Farms 7 Eleven Convenience Independent