Wine Australia providing insights for Australian Wine

Margaret River

Export Report: Packaged wine

MAT March 2020

Important reading

- This report provides an overview of packaged wine exports where there is a GI claim on the label. It does not provide a full picture of all wine that has been produced and exported from a specific region. Packaged wine includes glass bottle, soft pack and alternative packaging.
- This report is for packaged wine only and wine exported in bulk containers is not included.
- This report is updated quarterly.
- All data, unless specifically stated, is for the moving annual total (MAT), in other words, for the 12 months to the month ending that stated on the front cover. All growth rates are for the annual change to the same period.
- All data presented is for wines where the report's region is the primary GI named on the label. For example, one bottle of Yarra Valley/King Valley blend will contribute 750ml towards the Yarra Valley report but will be excluded from the King Valley report.
- When the wine is not regionally identified, data is not included in this report. For example, if the same Yarra Valley/King Valley wine has no GI claim on the bottle it will be included in a report 'no label claim'.

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

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GI claims over time

	Volume		Value		Average Value	
	'000 litres	Change	'000 AUD	Change	AUD per litre	Change
MAT March 2012	2,466	3%	$23,849	4%	$9.67	1%
MAT March 2013	2,734	11%	$28,039	18%	$10.26	6%
MAT March 2014	2,192	-20%	$23,391	-17%	$10.67	4%
MAT March 2015	2,034	-7%	$23,285	0%	$11.45	7%
MAT March 2016	2,093	3%	$24,017	3%	$11.47	0%
MAT March 2017	2,560	22%	$30,166	26%	$11.78	3%
MAT March 2018	2,534	-1%	$30,799	2%	$12.15	3%
MAT March 2019	2,473	-2%	$30,418	-1%	$12.30	1%
MAT March 2020	2,513	2%	$31,720	4%	$12.62	3%

GI claims by country

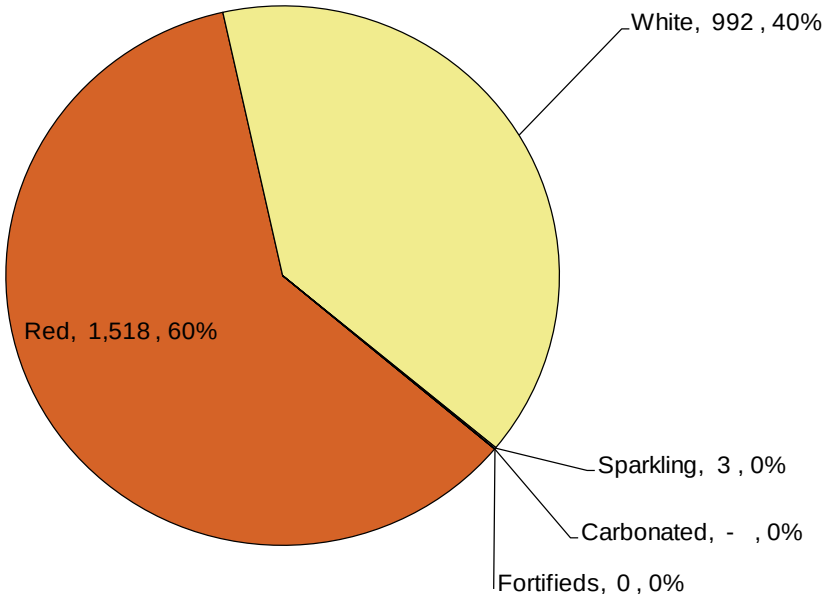
	MAT March									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Volume ('000 litres)										
Canada	178	197	198	175	150	138	177	143	131	116
China, Pr	447	341	681	393	337	349	566	619	699	649
France	55	86	67	66	68	39	38	50	21	16
Hong Kong	219	364	296	194	124	132	114	119	101	97
Indonesia	17	44	28	21	19	23	28	32	32	44
Japan	69	67	53	44	41	43	28	40	31	71
Malaysia	27	46	41	51	52	31	27	39	40	36
New Zealand	36	38	59	77	68	58	85	84	82	69
Ship	37	75	47	52	20	47	84	42	38	47
Singapore	184	214	223	199	216	244	225	217	233	249
Thailand	20	54	41	42	29	51	92	70	97	113
United Arab Emirates	38	38	77	65	68	56	45	68	38	27
United Kingdom	662	531	361	357	360	392	512	401	346	290
United States Of America	170	128	374	271	331	347	372	421	355	440
Vietnam	17	13	9	11	6	6	5	9	9	109
Value ('000 AUD)										
Canada	1,920	2,097	1,976	1,776	1,654	1,744	2,156	1,816	1,739	1,651
China, Pr	3,510	3,495	6,950	4,225	3,845	3,802	6,435	6,867	8,134	8,195
France	716	860	642	753	780	411	429	509	288	213
Hong Kong	2,228	2,666	2,612	1,969	1,599	1,559	1,625	1,724	1,640	1,259
Indonesia	271	608	485	291	248	293	371	448	508	605
Japan	1,011	961	1,268	646	556	664	432	624	468	919
Malaysia	361	521	516	540	550	399	343	477	470	530
New Zealand	363	388	572	646	621	546	787	774	847	666
Ship	516	943	661	526	236	429	787	489	461	474
Singapore	2,447	2,680	2,919	2,670	2,812	3,252	3,160	3,213	3,478	3,936
Thailand	243	452	358	354	240	532	815	687	984	1,198
United Arab Emirates	517	572	1,092	981	752	722	860	945	565	459
United Kingdom	5,097	3,884	3,103	3,167	3,896	3,990	5,141	4,611	3,684	3,445
United States Of America	1,381	1,367	2,873	2,887	3,768	3,972	4,600	5,229	4,308	5,084
Vietnam	207	176	113	147	84	88	82	170	124	1,169

Packaged exports by price point and destination

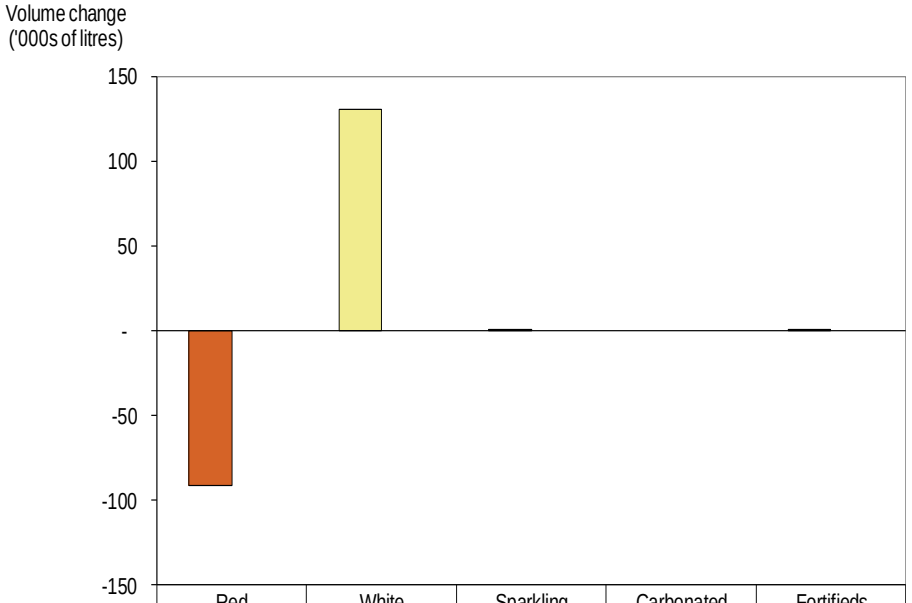
	$2.49 and under		$2.50 to $4.99		$5.00 to $7.49		$7.50 to $9.99		$10 to $19.99		Above $20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
China, Pr	6	38%	49	-52%	60	-52%	142	72%	325	5%	66	-9%	649	-7%
United States Of America	-	-100%	6	-6%	66	132%	210	49%	121	-20%	38	30%	440	24%
United Kingdom	0	na	9	-12%	30	-64%	161	-2%	61	-4%	28	25%	290	-16%
Singapore	1	1900%	-	-100%	6	36%	22	23%	172	-4%	49	54%	249	7%
Canada	-	-100%	-	na	1	-77%	1	-86%	105	-5%	9	-4%	116	-12%
Thailand	-	na	-	-100%	10	158%	52	-13%	47	68%	4	19%	113	17%
Vietnam	-	na	1	na	23	5349%	42	836%	42	1072%	1	29%	109	1054%
Hong Kong	0	410%	-	-100%	9	-26%	35	139%	43	-23%	9	-44%	97	-5%
Japan	-	na	11	na	-	-100%	26	255%	26	47%	8	67%	71	131%
New Zealand	-	na	3	1578%	24	-31%	29	81%	10	-63%	4	-16%	69	-16%
Ship	-	na	12	na	4	543%	5	-41%	25	-14%	1	154%	47	22%
Indonesia	-	na	-	na	-	na	17	151%	21	27%	6	-33%	44	37%
Malaysia	-	na	0	-93%	5	-36%	7	-38%	19	52%	5	25%	36	-9%
United Arab Emirates	-	na	-	na	0	na	8	85%	14	-52%	5	34%	27	-28%
France	-	na	-	na	-	na	9	14%	6	-51%	2	-23%	16	-25%
Other	0.1	-75%	0	na	15	-66%	28	-64%	72	0%	22	-8%	138	-37%
Total	7.3	29%	90	-28%	254	-28%	795	26%	1,108	-1%	258	8%	2,513	2%

Packaged exports by colour/wine style

Volume ('000 litres)



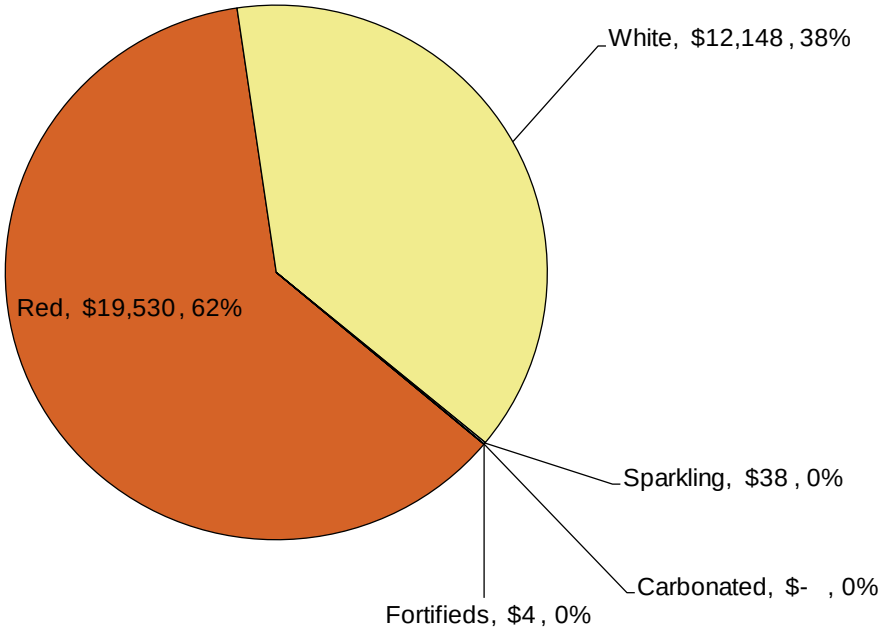
Change in volume



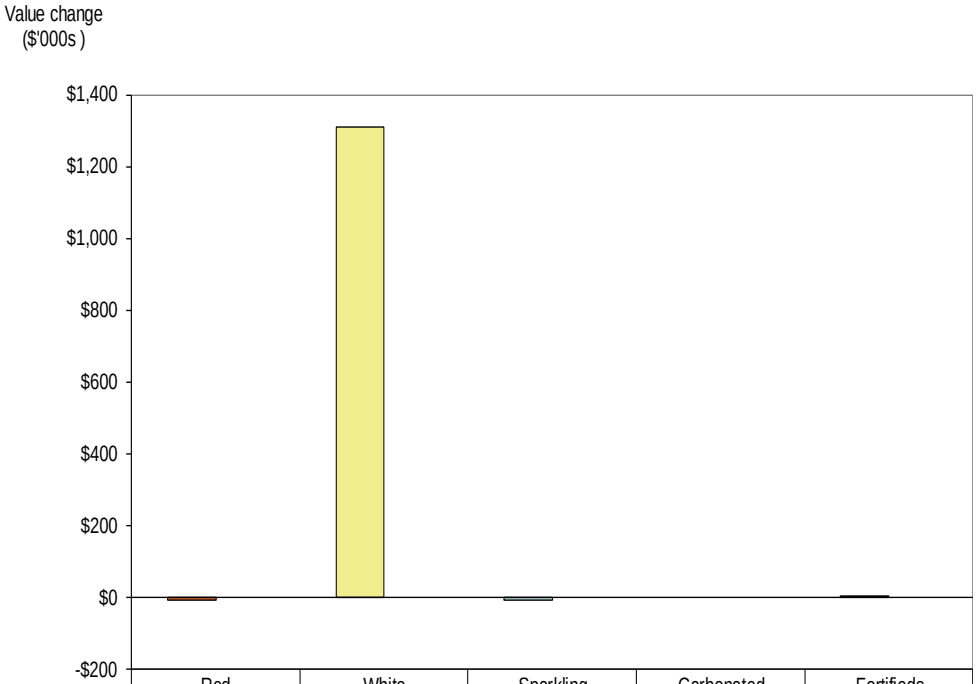
	Red	White	Sparkling	Carbonated	Fortifieds
Volume change	-91	131	0	-	0
%change	-6%	15%	2%	0%	0%

Packaged exports by colour/wine style

Value ('000 AUD)



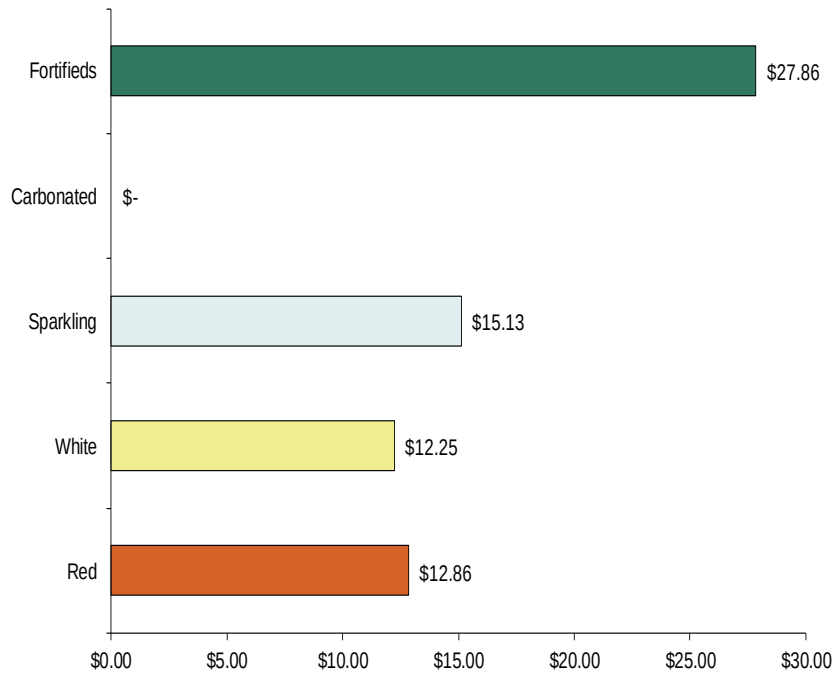
Change in value



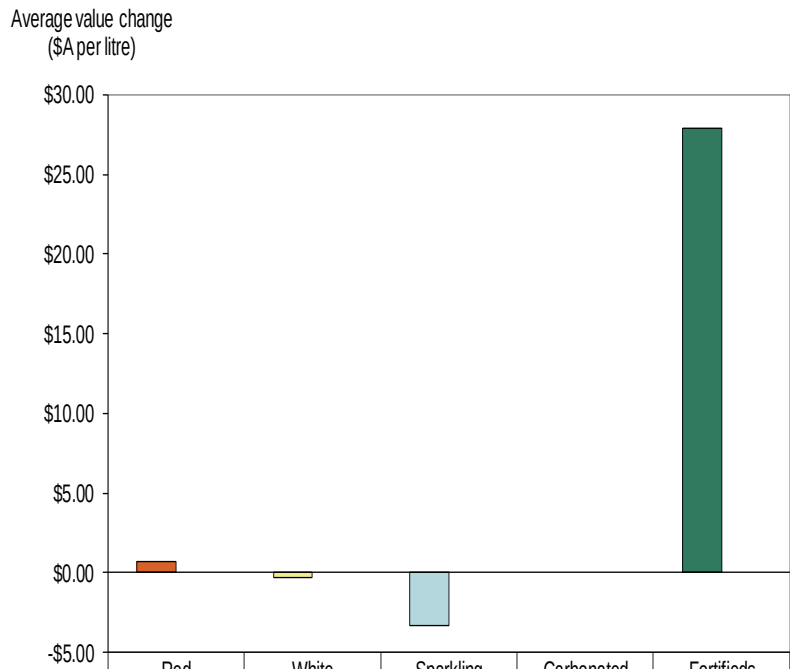
	Red	White	Sparkling	Carbonated	Fortifieds
Value change	-$6	$1,311	-$7	$-	$4
%change	0%	12%	-16%	0%	0%

Packaged exports by colour/wine style

Average value (AUD per litre)

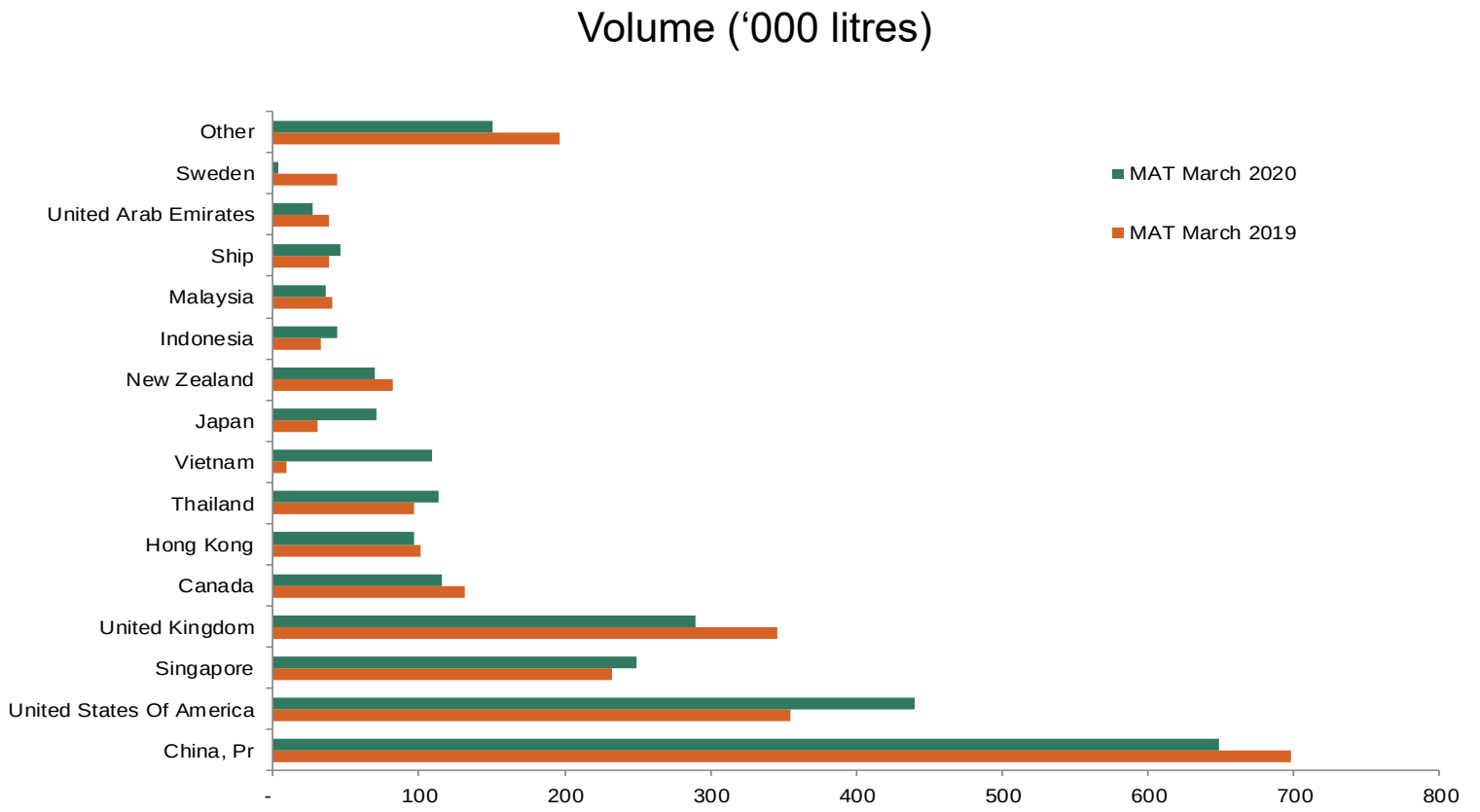


Change in average value



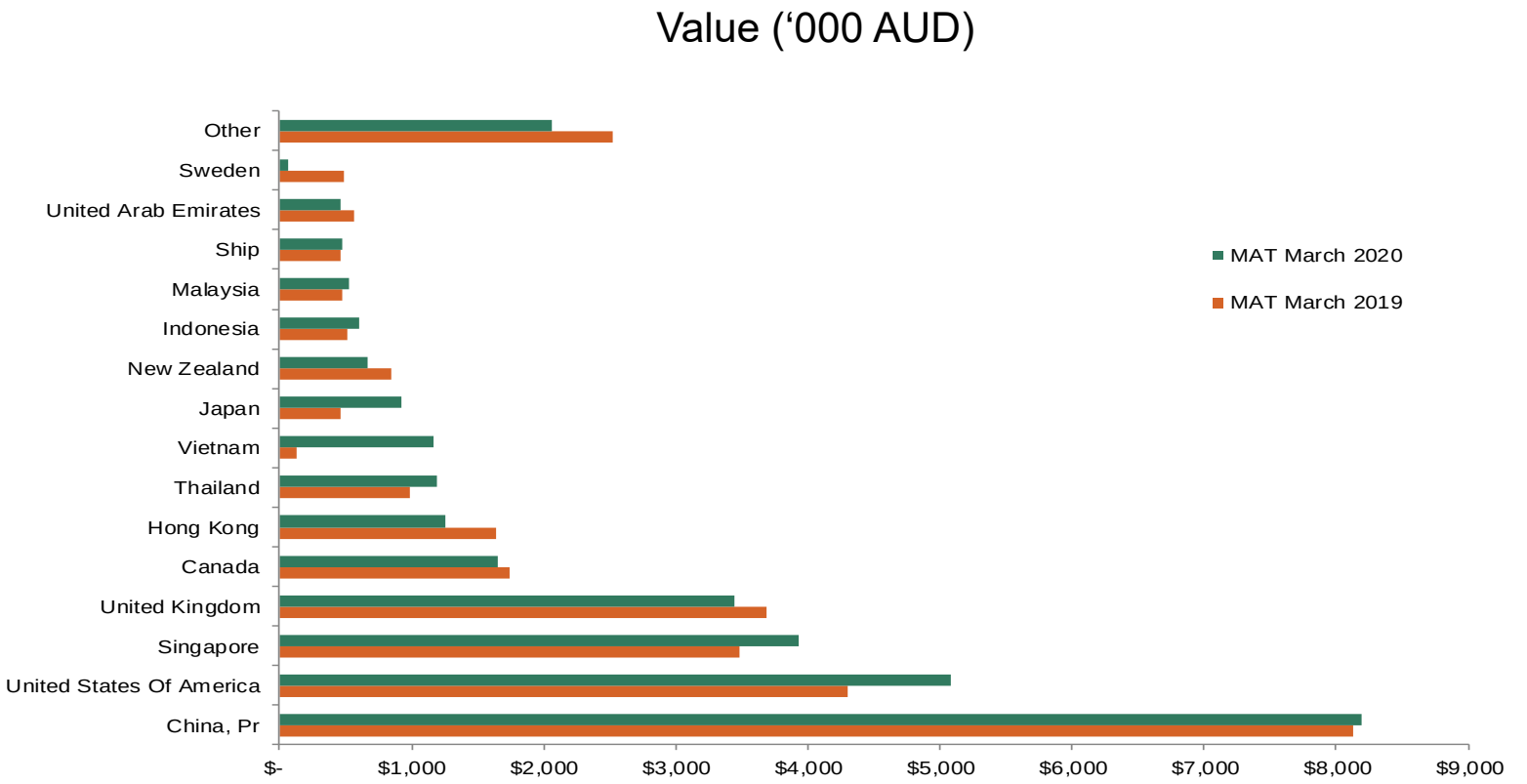
	Red	White	Sparkling	Carbonated	Fortifieds
Avrg. Val. change	$0.73	$(0.33)	$(3.33)	$-	$27.86
%change	6%	-3%	-18%	0%	0%

Packaged exports by top 15 destinations



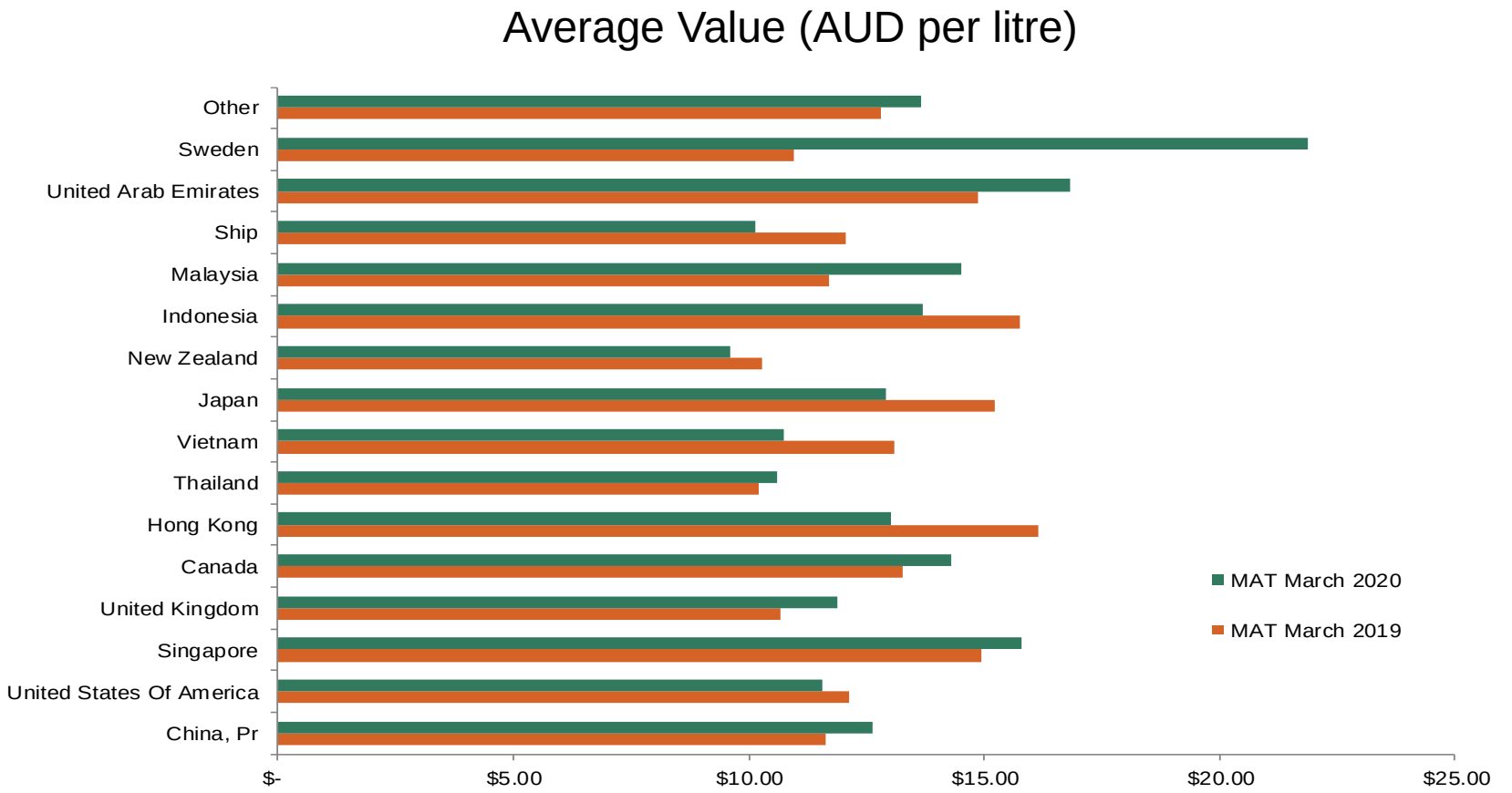
	China, Pr	United States Of America	Singapore	United Kingdom	Canada	Hong Kong	Thailand	Vietnam	Japan	New Zealand	Indonesia	Malaysia	Ship	United Arab Emirates	Sweden	Other
MAT March 2020	649	440	249	290	116	97	113	109	71	69	44	36	47	27	3	151
MAT March 2019	699	355	233	346	131	101	97	9	31	82	32	40	38	38	44	197

Packaged exports by top 15 destinations



	China, Pr	United States Of America	Singapore	United Kingdom	Canada	Hong Kong	Thailand	Vietnam	Japan	New Zealand	Indonesia	Malaysia	Ship	United Arab Emirates	Sweden	Other
MAT March 2020	$8,195	$5,084	$3,936	$3,445	$1,651	$1,259	$1,198	$1,169	$919	$666	$605	$530	$474	$459	$69	$2,060
MAT March 2019	$8,134	$4,308	$3,478	$3,684	$1,739	$1,640	$984	$124	$468	$847	$508	$470	$461	$565	$484	$2,523

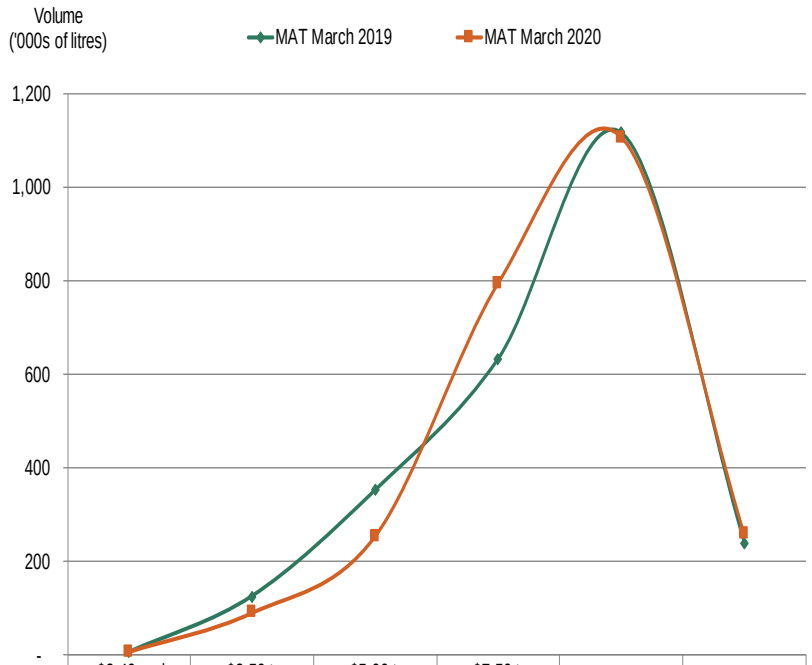
Packaged exports by top 15 destinations



	China, Pr	United States Of America	Singapore	United Kingdom	Canada	Hong Kong	Thailand	Vietnam	Japan	New Zealand	Indonesia	Malaysia	Ship	United Arab Emirates	Sweden	Other
MAT March 2020	$12.62	$11.54	$15.78	$11.88	$14.28	$13.00	$10.58	$10.73	$12.91	$9.62	$13.70	$14.52	$10.15	$16.83	$21.86	$13.65
MAT March 2019	$11.64	$12.14	$14.95	$10.66	$13.27	$16.16	$10.20	$13.10	$15.22	$10.28	$15.74	$11.72	$12.07	$14.87	$10.97	$12.80

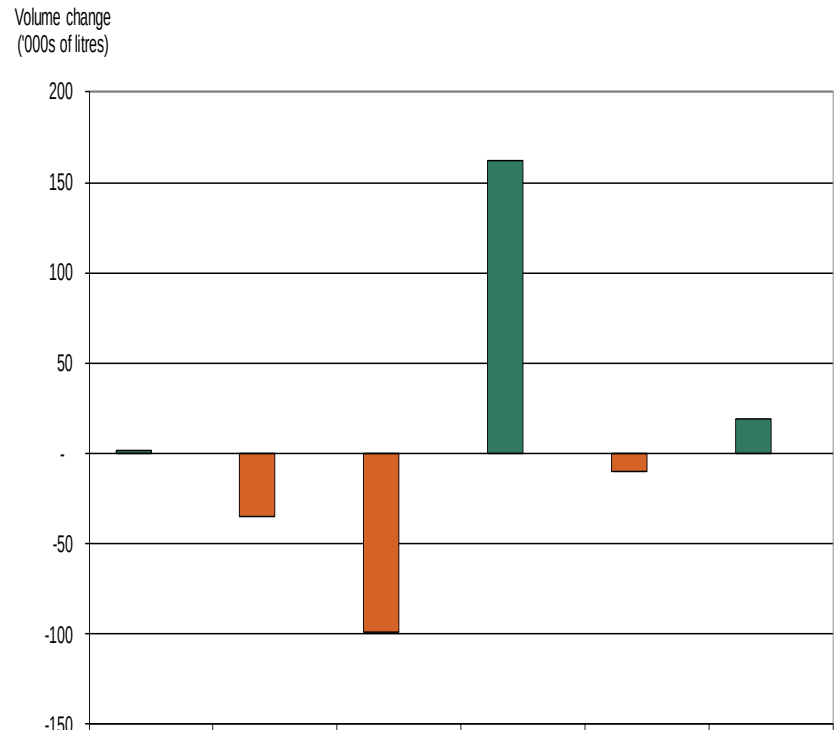
Packaged exports by price point

Volume ('000 litres)



	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10 to $19.99	Above $20
MAT March 2019	6	126	352	633	1,117	239.30
MAT March 2020	7	90	254	795	1,108	258

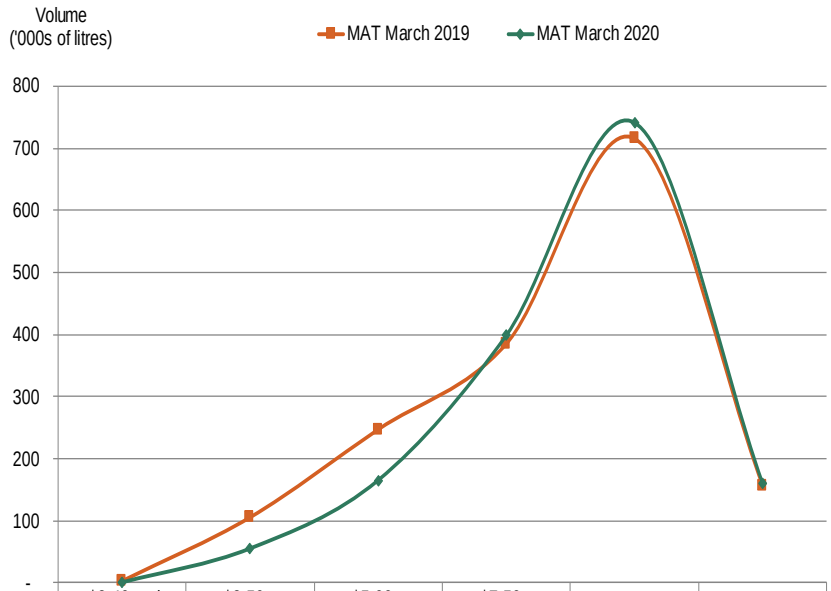
Change in volume



	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10 to $19.99	Above $20
Vol change	2	-35	-98	162	-10	19
%change	29%	-28%	-28%	26%	-1%	8%

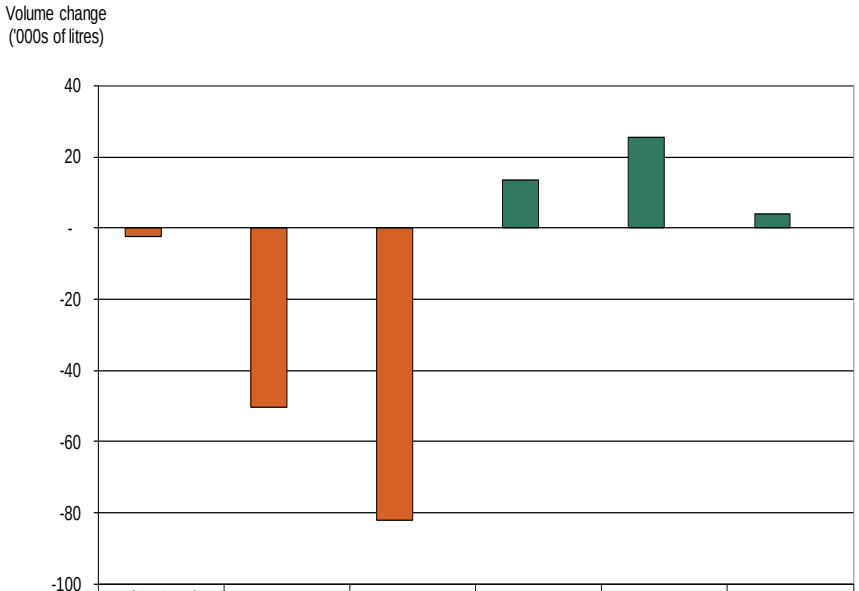
Packaged red wine exports by price point

Volume ('000 litres)



	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10 to $19.99	Above $20
MAT March 2019	2	105	247	385	715	155.75
MAT March 2020	-	55	165	398	741	159.62

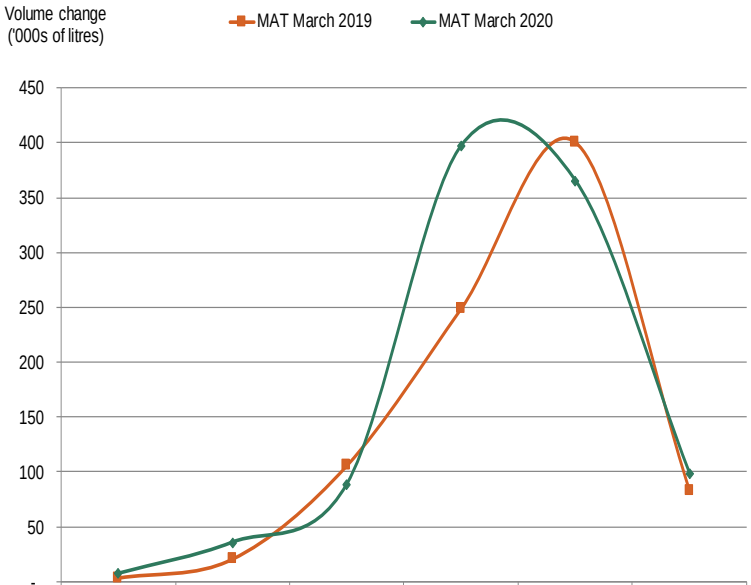
Change in volume



	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10 to $19.99	Above $20
Vol change	-2	-50	-82	14	26	4
%change	-100%	-48%	-33%	4%	4%	2%

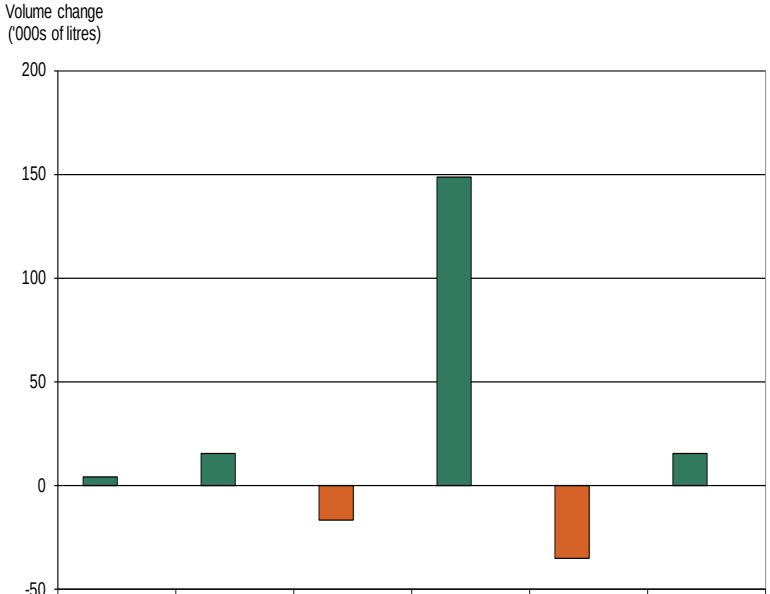
Packaged white wine exports by price point

Volume ('000 litres)



	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10 to $19.99	Above $20
MAT March 2019	3	21	106	249	400	82.67
MAT March 2020	7	36	89	397	365	98.10

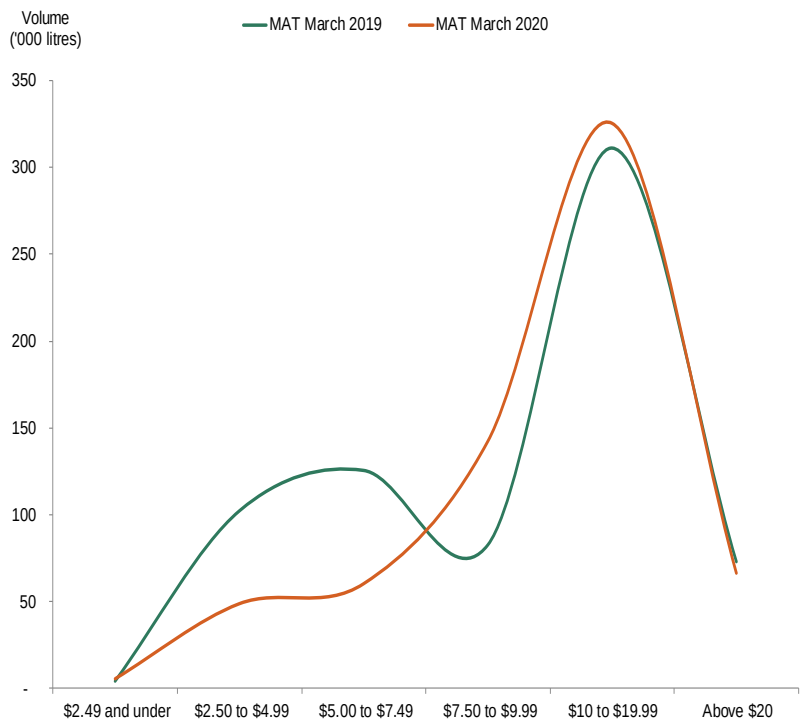
Change in volume



	$2.49 and under	$2.50 to $4.99	$5.00 to $7.49	$7.50 to $9.99	$10 to $19.99	Above $20
Vol change	4	15	-17	148	-35	15
%change	117%	74%	-16%	60%	-9%	19%

Packaged wine exports to China, Pr

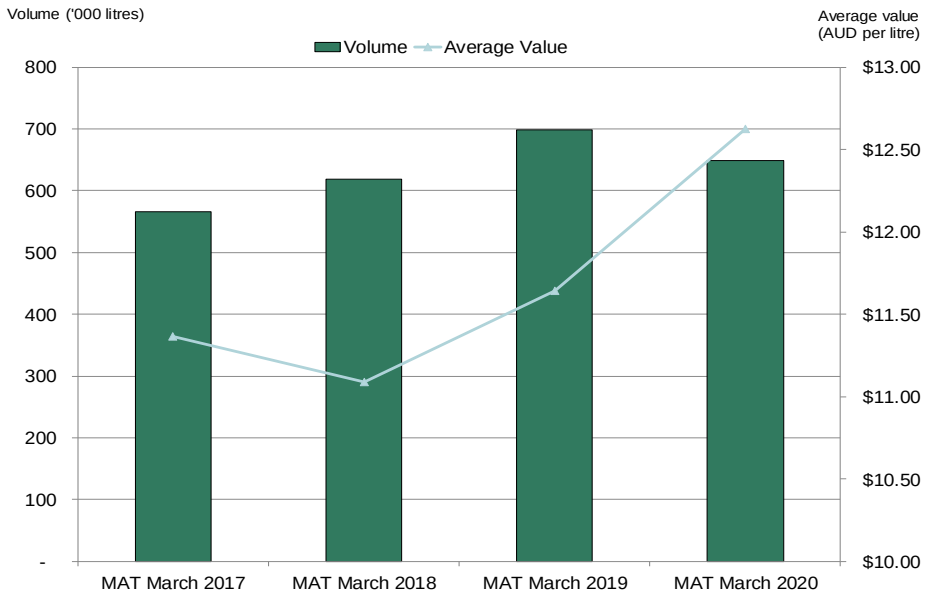
Total wine by price point



Overview

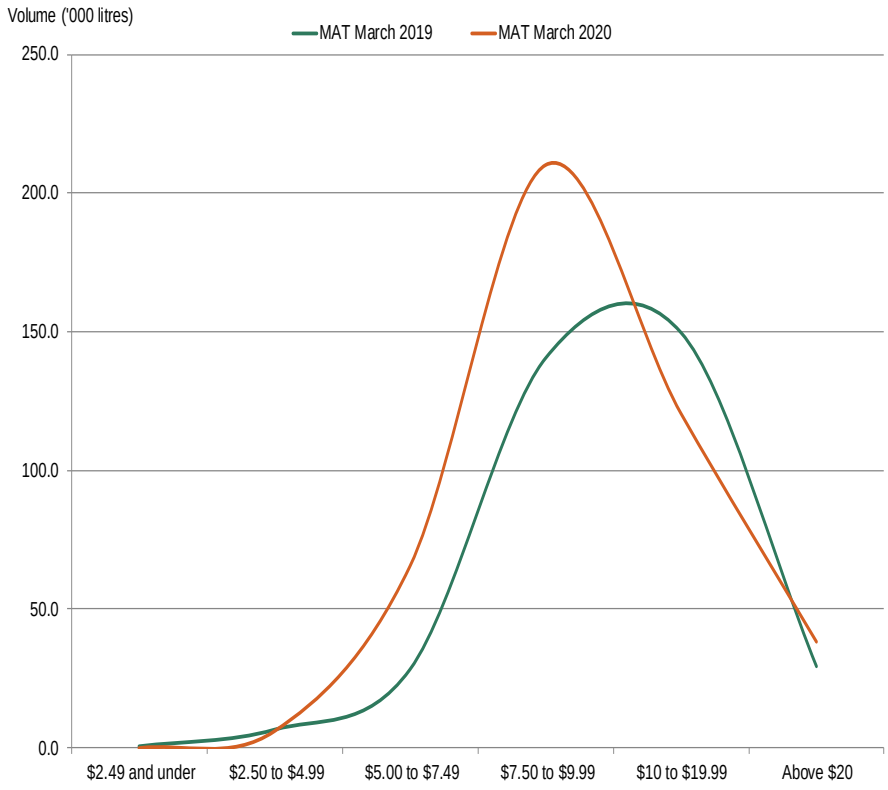
		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	612,372	571,295	-7%
	Value (AUD)	$7,044,167	$7,182,396	2%
	Average value	$11.50	$12.57	9%
White wine	Volume (litres)	84,800	77,675	-8%
	Value (AUD)	$1,062,604	$1,007,692	-5%
	Average value	$12.53	$12.97	4%
Total wine	Volume (litres)	698,670	649,189	-7%
	Value (AUD)	$8,134,096	$8,195,062	1%
	Average value	$11.64	$12.62	8%

Total volume and average value



Packaged wine exports to United States Of America

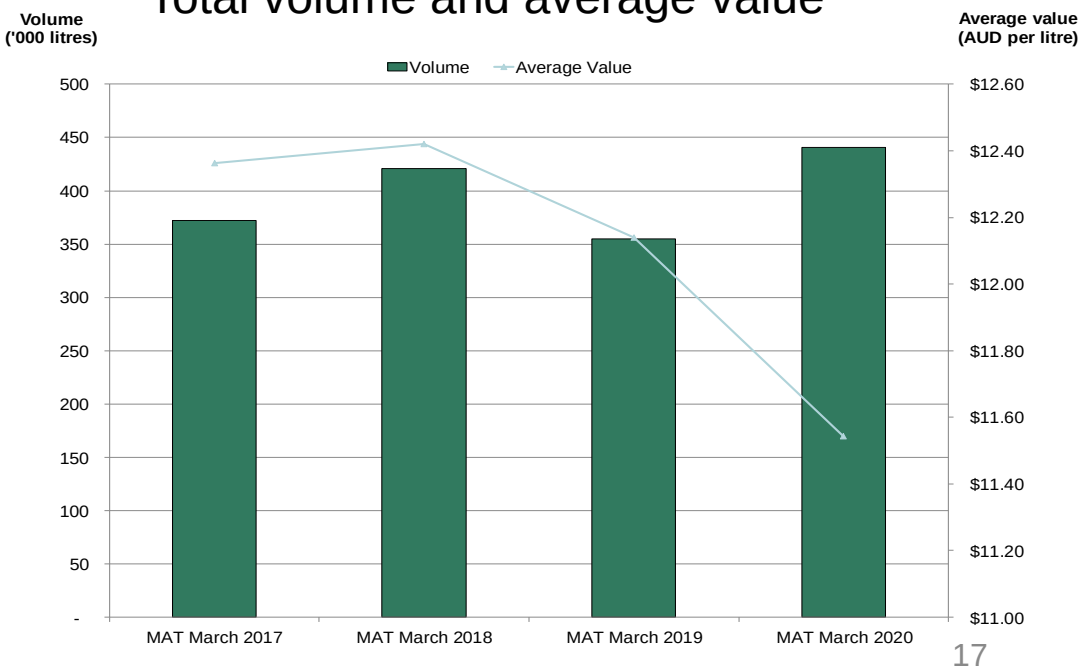
Total wine by price point



Overview

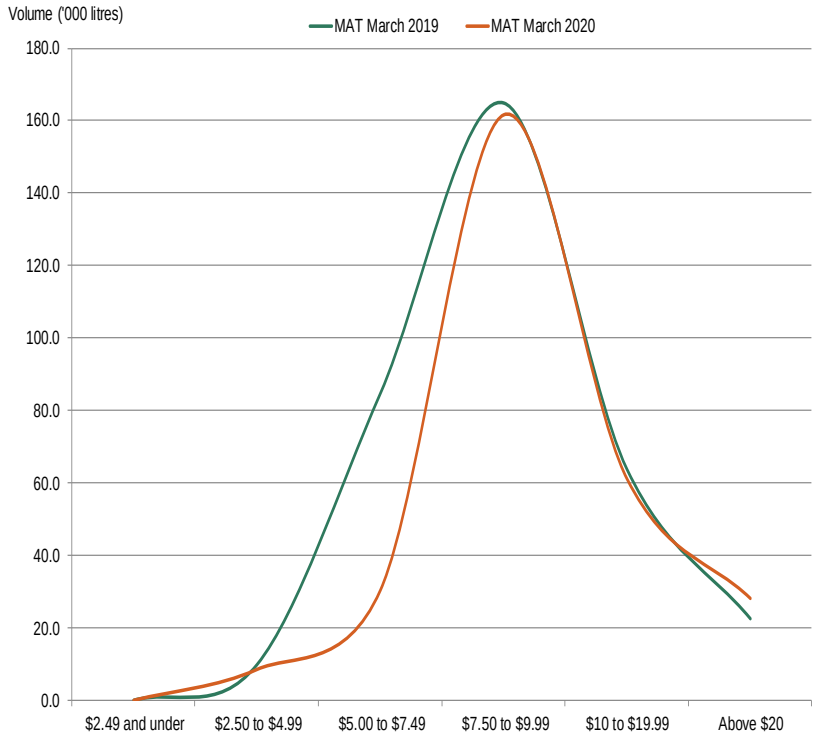
		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	126,770	144,045	14%
	Value (AUD)	$1,668,559	$1,936,126	16%
	Average value	$13.16	$13.44	2%
White wine	Volume (litres)	227,718	296,379	30%
	Value (AUD)	$2,631,553	$3,147,929	20%
	Average value	$11.56	$10.62	-8%
Total wine	Volume (litres)	354,884	440,424	24%
	Value (AUD)	$4,308,032	$5,084,055	18%
	Average value	$12.14	$11.54	-5%

Total volume and average value



Packaged wine exports to United Kingdom

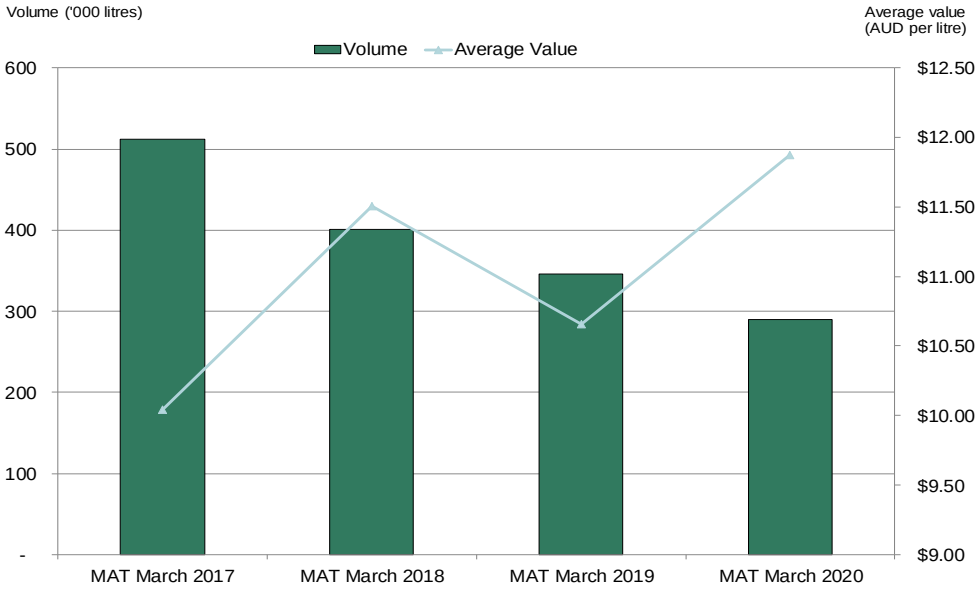
Total wine by price point



Overview

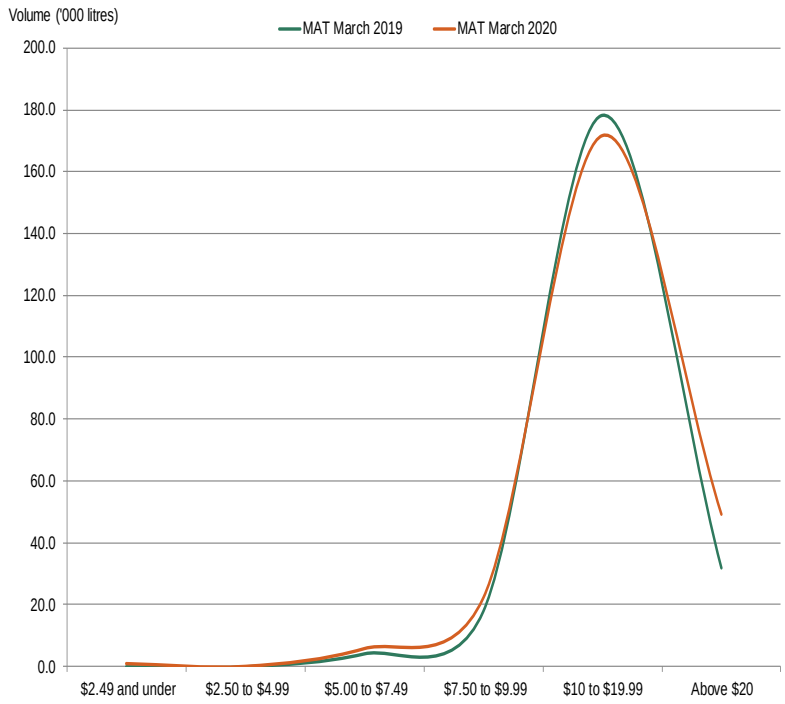
		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	231,614	160,926	-31%
	Value (AUD)	$2,375,295	$1,887,345	-21%
	Average value	$10.26	$11.73	14%
White wine	Volume (litres)	113,801	128,932	13%
	Value (AUD)	$1,302,639	$1,554,638	19%
	Average value	$11.45	$12.06	5%
Total wine	Volume (litres)	345,721	290,074	-16%
	Value (AUD)	$3,684,054	$3,445,126	-6%
	Average value	$10.66	$11.88	11%

Total volume and average value



Packaged wine exports to Singapore

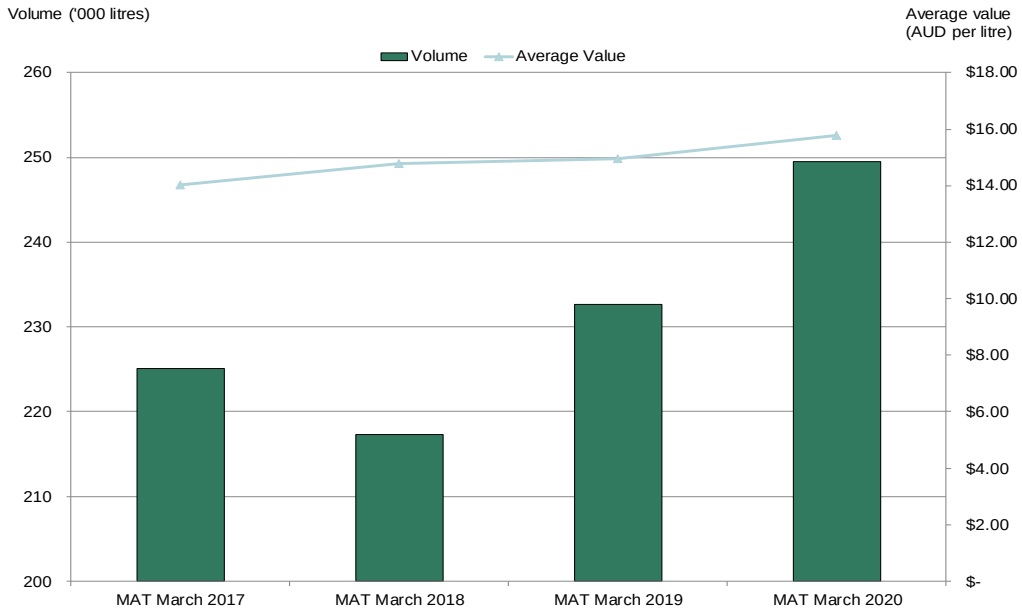
Total wine by price point



Overview

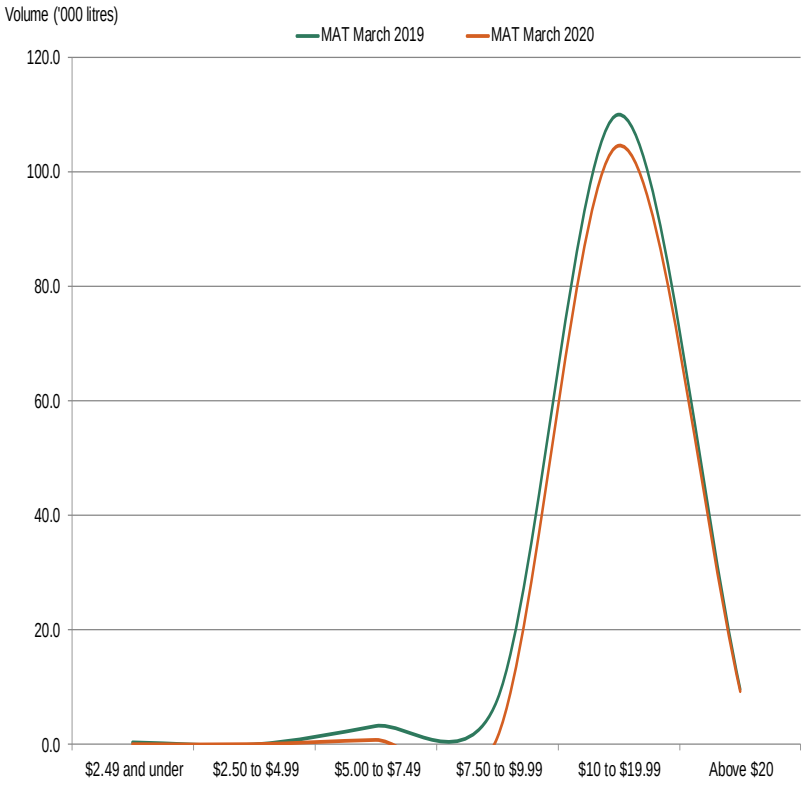
		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	135,410	128,450	-5%
	Value (AUD)	$2,060,932	$2,073,159	1%
	Average value	$15.22	$16.14	6%
White wine	Volume (litres)	97,178	120,721	24%
	Value (AUD)	$1,417,006	$1,858,648	31%
	Average value	$14.58	$15.40	6%
Total wine	Volume (litres)	232,597	249,450	7%
	Value (AUD)	$3,478,059	$3,936,450	13%
	Average value	$14.95	$15.78	6%

Total volume and average value



Packaged wine exports to Canada

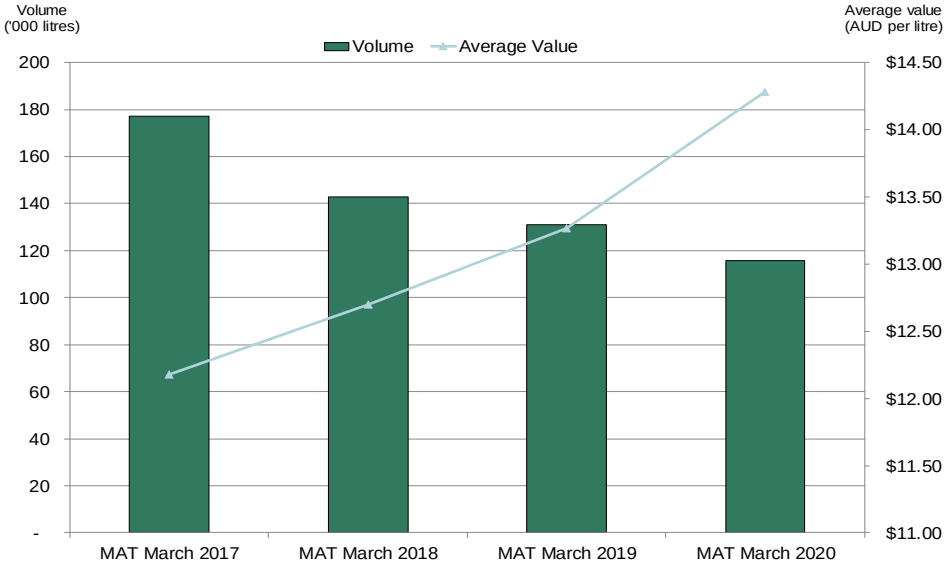
Total wine by price point



Overview

		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	92,220	84,383	-8%
	Value (AUD)	$1,219,428	$1,179,099	-3%
	Average value	$13.22	$13.97	6%
White wine	Volume (litres)	38,817	30,632	-21%
	Value (AUD)	$519,234	$467,567	-10%
	Average value	$13.38	$15.26	14%
Total wine	Volume (litres)	131,082	115,622	-12%
	Value (AUD)	$1,739,261	$1,651,474	-5%
	Average value	$13.27	$14.28	8%

Total volume and average value



Notes & Definitions

Export approvals: Wine approved by Wine Australia for export on specified dates. Exports reported in this document refer to the date wine is shipped and not the date of approval. Note that the AUD FOB value of wine reported in this document may differ from export values reported by the Australian Bureau of Statistics (ABS). The divergence between the two values derives from differences between Wine Australia and the ABS in the method of converting the value of exports denominated in foreign currency to AUD. In the case of the Australia, the exporter makes the conversion when submitting wine for export approval while the ABS converts the value on the day of shipment, at the daily conversion rate. With the Wine Australia method, it is expected that some of the conversions will occur at hedged rates while this does not occur with the ABS method. When the Australian exchange rate is moving significantly the alternative methods will result in diverging valuations. Volumes reported by Wine Australia and the ABS differ only marginally due to the 'approval' versus 'shipment' basis of reporting as well as marginal differences in scope and definition.

MAT: Moving annual total - refers to the twelve months to the end of the nominated month.

% Change : Is calculated as the percentage change in the MAT for the immediate past 12 months compared to the preceding 12 months.

Formula: % Change = ((current MAT - preceding MAT)/preceding MAT) x 100

AUD: Australian dollars

FOB: 'Free on board' value of the wine, where the point of valuation is where goods are placed on board the international carrier, at the border of the exporting country. The FOB value includes production and other costs up until placement on the international carrier but excludes international insurance and transport costs.

Country: In most instances, this indicates where the wine is consumed. In some instances, it may be the country at which the wine is off-loaded for bottling and/or trans-shipment to the country of final consumption.

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

Notes & Definitions (continued)

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

Bulk: Wine shipped for repackaging elsewhere. This may involve containers with a capacity of 20 litres or more but will most often mean large shipping containers ranging in size between 10 000 and 24 000 litres.

Cask or soft packs: Plastic containers within cardboard outers usually carrying between 2 and 20 litres.

Flagons: Glass containers holding 2 litres or more.

Bottles: Glass containers holding less than 2 litres.

Alternative packaging: Includes: Flagon, Tetra-pak, PET and Aluminium

Red wine: Amounts reported may or may not include both dry red wine and rose

White wine: Amounts reported may or may not include both dry and sweet white wine

Fermented sparkling: Sparkling wine in which the effervescence is produced naturally through secondary fermentation in the bottle.