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Margaret River
Export Report:
Bottled wine

MAT September 2018

Important reading

- This report provides an overview of bottled 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.
- This report is for bottled 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 September 2010	1,908	8%	\$20,272	0%	\$10.62	-7%
MAT September 2011	2,483	30%	\$22,974	13%	\$9.25	-13%
MAT September 2012	2,530	2%	\$25,700	12%	\$10.16	10%
MAT September 2013	2,551	1%	\$26,647	4%	\$10.45	3%
MAT September 2014	2,208	-13%	\$23,112	-13%	\$10.47	0%
MAT September 2015	1,937	-12%	\$22,498	-3%	\$11.61	11%
MAT September 2016	2,290	18%	\$27,031	20%	\$11.81	2%
MAT September 2017	2,606	14%	\$31,375	16%	\$12.04	2%
MAT September 2018	2,481	-5%	\$29,867	-5%	\$12.04	0%

GI claims by country

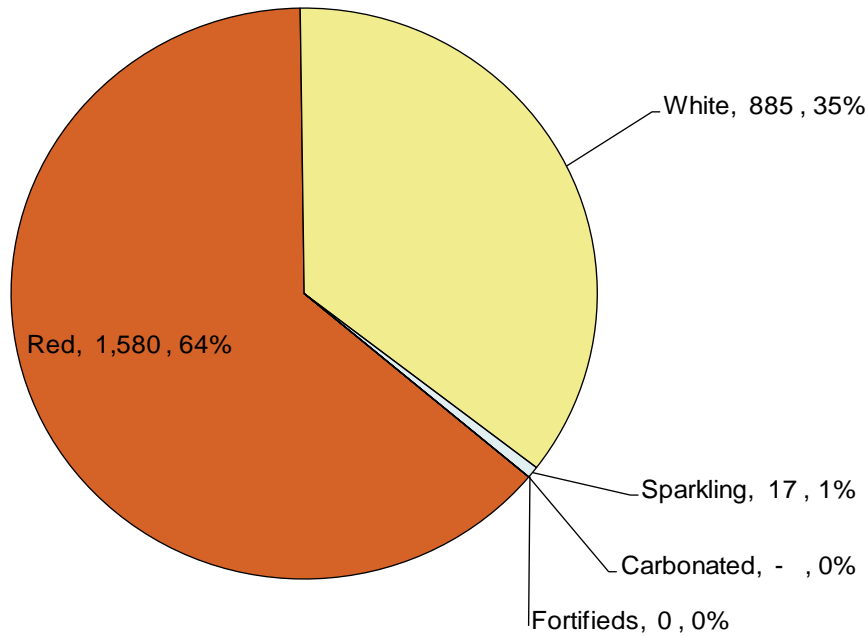
	MAT September									
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Volume ('000 litres)										
Canada	135	159	201	200	172	178	131	137	174	141
China, Pr	156	267	396	485	572	371	327	404	645	645
France	37	60	69	61	116	58	38	49	38	25
Germany, Federal Republic	19	15	27	48	29	7	7	13	6	30
Hong Kong	148	177	232	373	264	166	140	126	107	117
Indonesia	19	12	25	39	23	17	30	12	39	31
Japan	69	71	59	55	56	44	41	34	32	41
Malaysia	24	19	36	51	43	46	48	27	34	35
New Zealand	66	44	40	52	49	103	54	68	92	77
Ship	26	20	51	58	72	21	42	65	49	47
Singapore	146	210	174	253	181	216	219	249	227	228
Thailand	7	17	29	56	32	43	30	72	91	93
United Arab Emirates	67	33	39	45	86	60	66	46	66	45
United Kingdom	396	487	703	382	336	388	383	439	463	351
United States Of America	308	119	184	215	342	338	246	426	351	365
Value ('000 AUD)										
Canada	1,757	1,700	2,094	2,169	1,664	1,834	1,573	1,718	2,150	1,867
China, Pr	1,420	2,266	3,257	4,870	6,262	3,821	3,712	4,636	7,312	7,328
France	431	778	782	618	1,218	656	414	526	415	274
Germany, Federal Republic	231	170	254	460	321	63	63	144	79	225
Hong Kong	1,882	2,040	2,341	2,693	2,449	1,645	1,688	1,667	1,668	1,612
Indonesia	313	186	417	530	362	265	392	144	564	454
Japan	1,117	1,172	899	1,261	772	631	622	506	486	634
Malaysia	356	256	415	650	506	466	526	336	390	480
New Zealand	577	490	395	517	479	837	519	646	857	715
Ship	388	337	702	754	763	266	376	591	551	540
Singapore	2,454	2,651	2,137	3,237	2,457	2,771	2,916	3,396	3,238	3,414
Thailand	97	217	266	474	289	350	295	682	807	979
United Arab Emirates	1,050	446	592	595	1,337	797	666	682	1,147	648
United Kingdom	3,642	4,207	4,859	3,321	2,830	3,685	4,115	4,400	4,939	3,884
United States Of America	2,680	1,272	1,451	1,925	3,055	3,351	3,088	5,293	4,149	4,323

Bottled exports by price point and destination

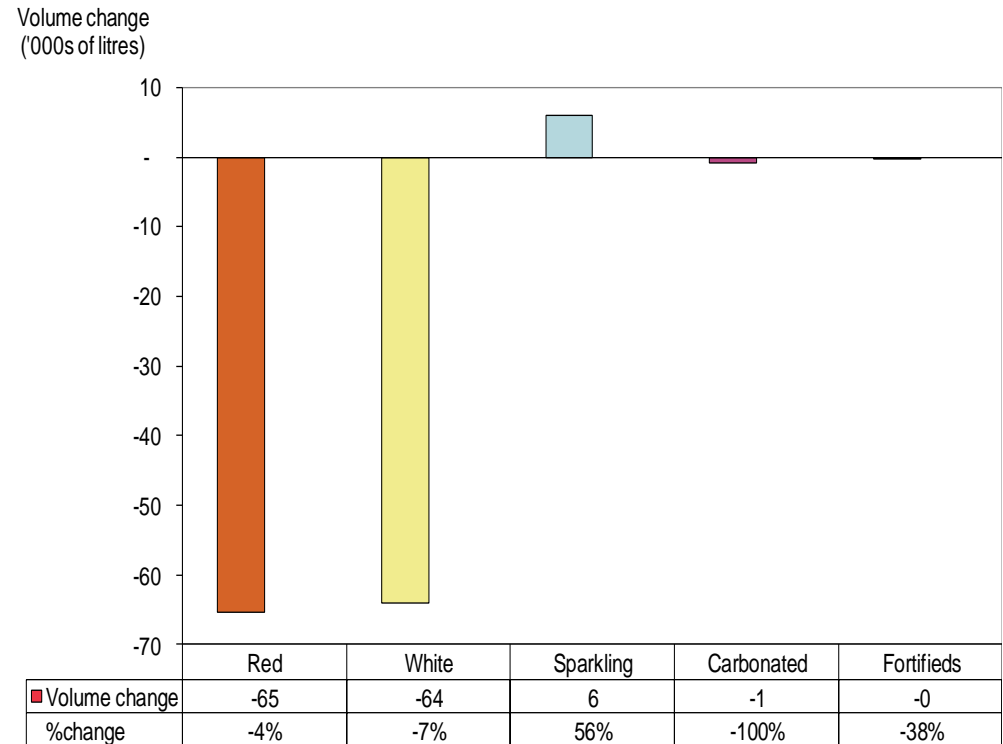
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10 to \$19.99		Above \$20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
China, Pr	0	-99%	88	-28%	139	99%	96	1%	261	-13%	61	16%	645	0%
United States Of America	-	na	2	-92%	52	512%	143	329%	139	-49%	29	67%	365	4%
United Kingdom	-	-100%	21	26%	86	-51%	126	16%	90	-31%	27	-1%	351	-24%
Singapore	-	na	1	-60%	4	-63%	21	10%	175	0%	28	29%	228	1%
Canada	-	na	-	na	4	-74%	5	-76%	121	-8%	11	46%	141	-19%
Hong Kong	0	na	1	-28%	16	20%	25	142%	59	-8%	16	-12%	117	9%
Thailand	-	na	-	-100%	6	-81%	59	104%	23	8%	4	303%	93	2%
New Zealand	-	na	3	437%	40	-22%	16	-16%	14	-12%	4	-18%	77	-16%
Ship	-	na	-	na	7	-43%	10	5%	30	16%	1	-59%	47	-4%
Sweden	-	na	-	na	-	na	36	na	6	-15%	4	270%	46	506%
United Arab Emirates	-	na	-	na	0	-64%	4	-60%	37	-11%	3	-74%	45	-32%
Japan	-	na	-	na	1	204%	9	71%	24	8%	7	70%	41	27%
Malaysia	-	-100%	4	55%	3	-37%	9	29%	14	-8%	5	70%	35	5%
Indonesia	-	na	4	55%	-	-100%	6	-52%	14	-24%	7	13%	31	-21%
Germany, Federal Republic	-	na	-	na	26	3151%	1	-2%	2	-39%	1	-19%	30	418%
Other	1	-14%	0	-99%	41	11%	66	7%	66	-31%	17	-36%	190	-15%
Total	1	-91%	124	-31%	425	-1%	632	43%	1,073	-20%	226	9%	2,481	-5%

Bottled exports by colour/wine style

Volume ('000 litres)



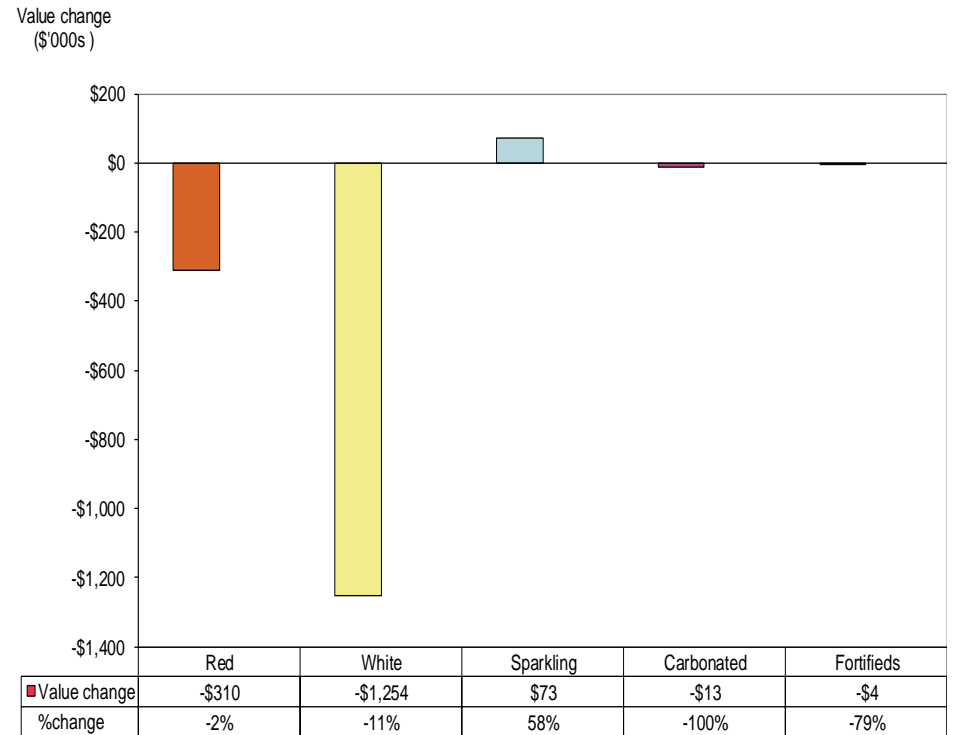
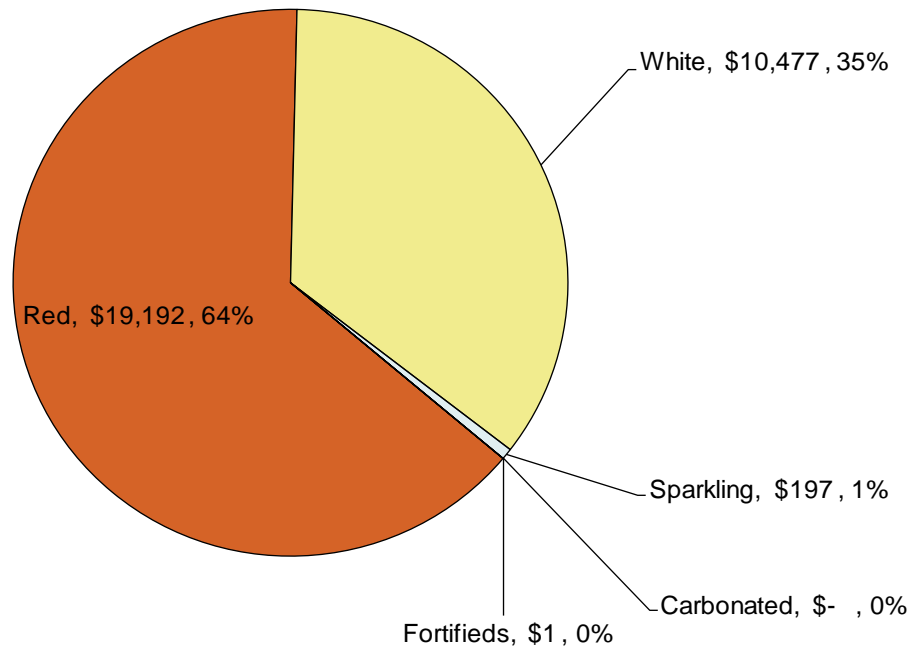
Change in volume



Bottled exports by colour/wine style

Value ('000 AUD)

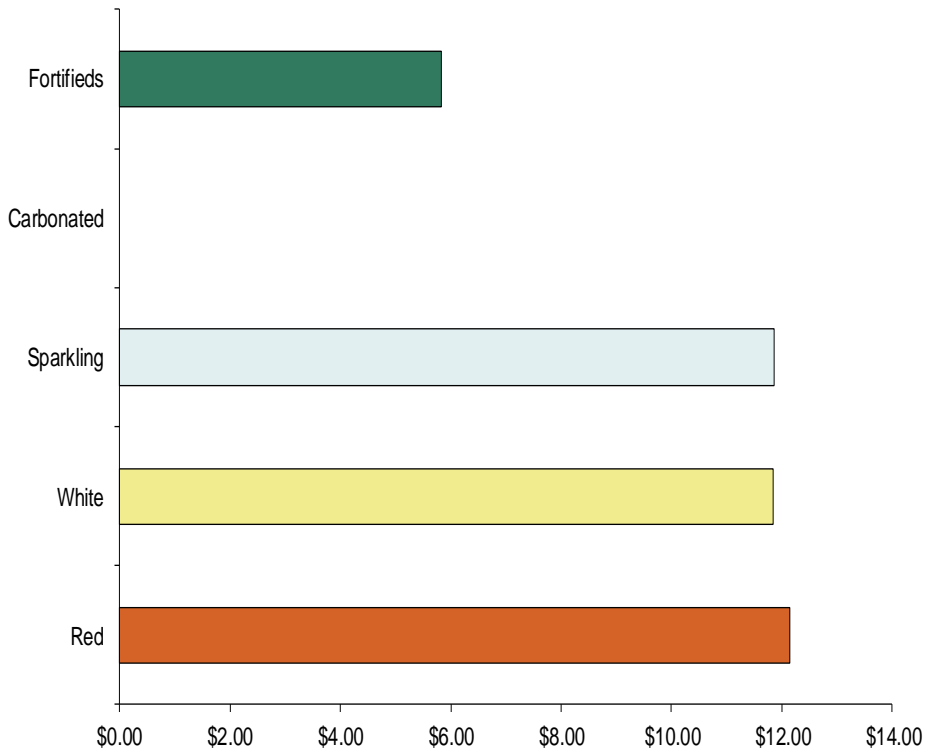
Change in value



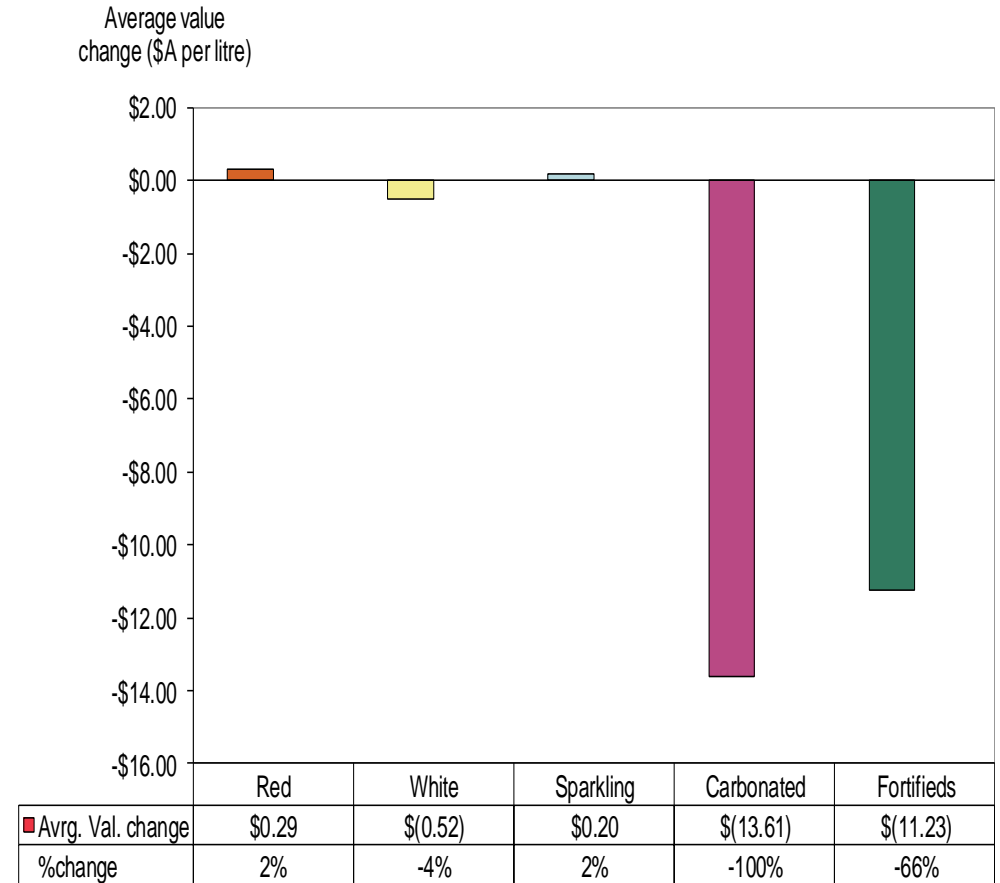
	Red	White	Sparkling	Carbonated	Fortifieds
Value change	-\$310	-\$1,254	\$73	-\$13	-\$4
%change	-2%	-11%	58%	-100%	-79%

Bottled exports by colour/wine style

Average value (AUD per litre)



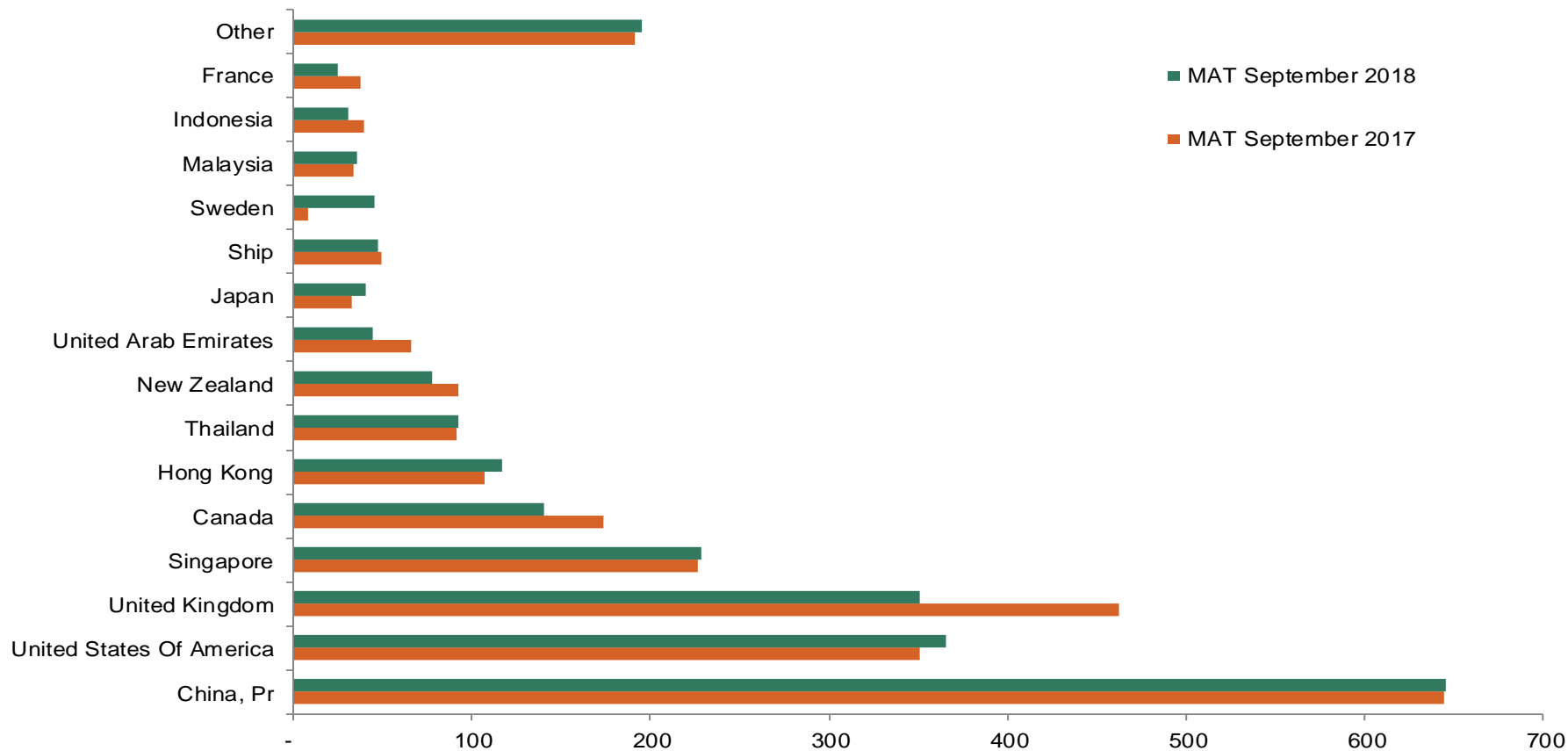
Change in average value



	Red	White	Sparkling	Carbonated	Fortifieds
■ Avg. Val. change	\$0.29	\$(0.52)	\$0.20	\$(13.61)	\$(11.23)
%change	2%	-4%	2%	-100%	-66%

Bottled exports by top 15 destinations

Volume ('000 litres)



	China, Pr	United States Of America	United Kingdom	Singapore	Canada	Hong Kong	Thailand	New Zealand	United Arab Emirates	Japan	Ship	Sweden	Malaysia	Indonesia	France	Other
■ MAT September 2018	645	365	351	228	141	117	93	77	45	41	47	46	35	31	25	195
■ MAT September 2017	645	351	463	227	174	107	91	92	66	32	49	8	34	39	38	191

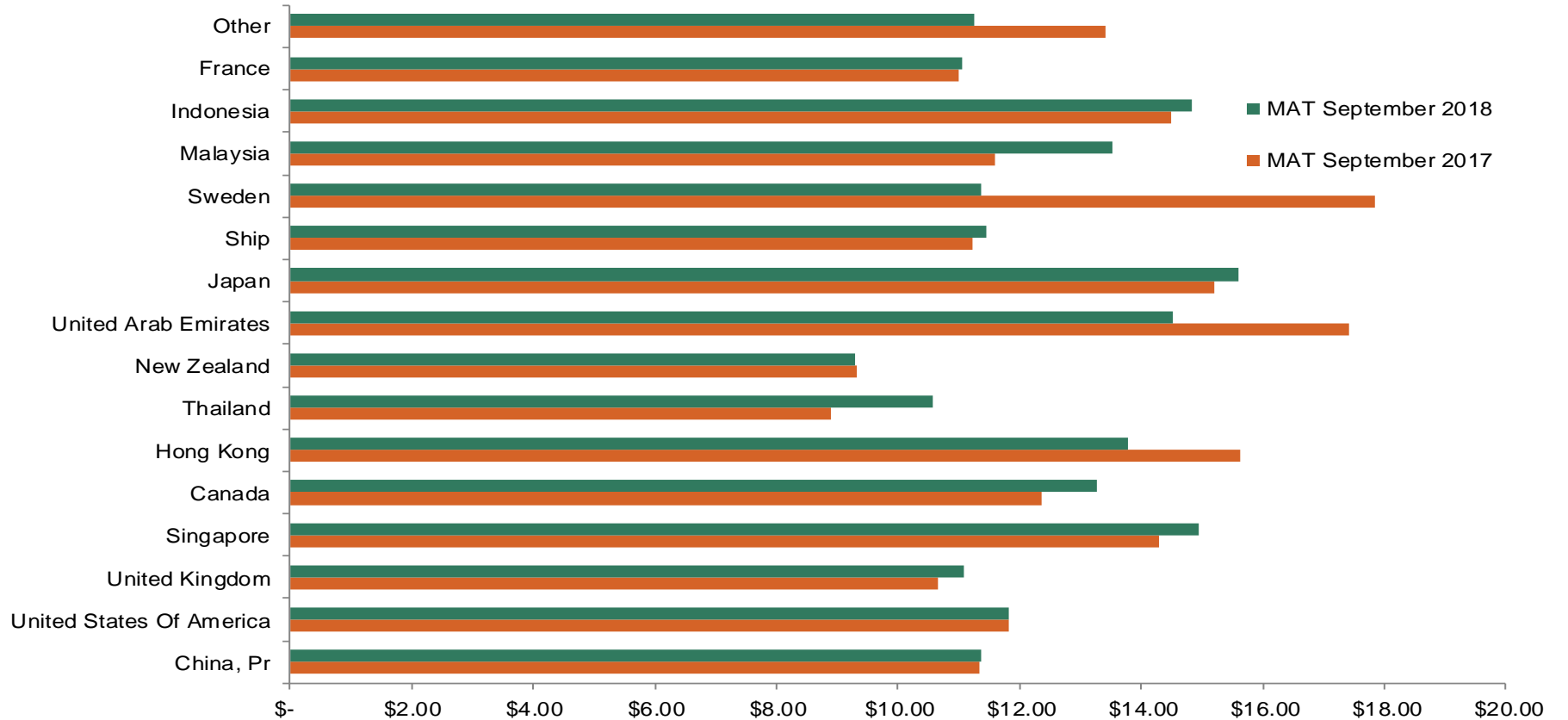
Bottled exports by top 15 destinations

Value ('000 AUD)



Bottled exports by top 15 destinations

Average Value (AUD per litre)

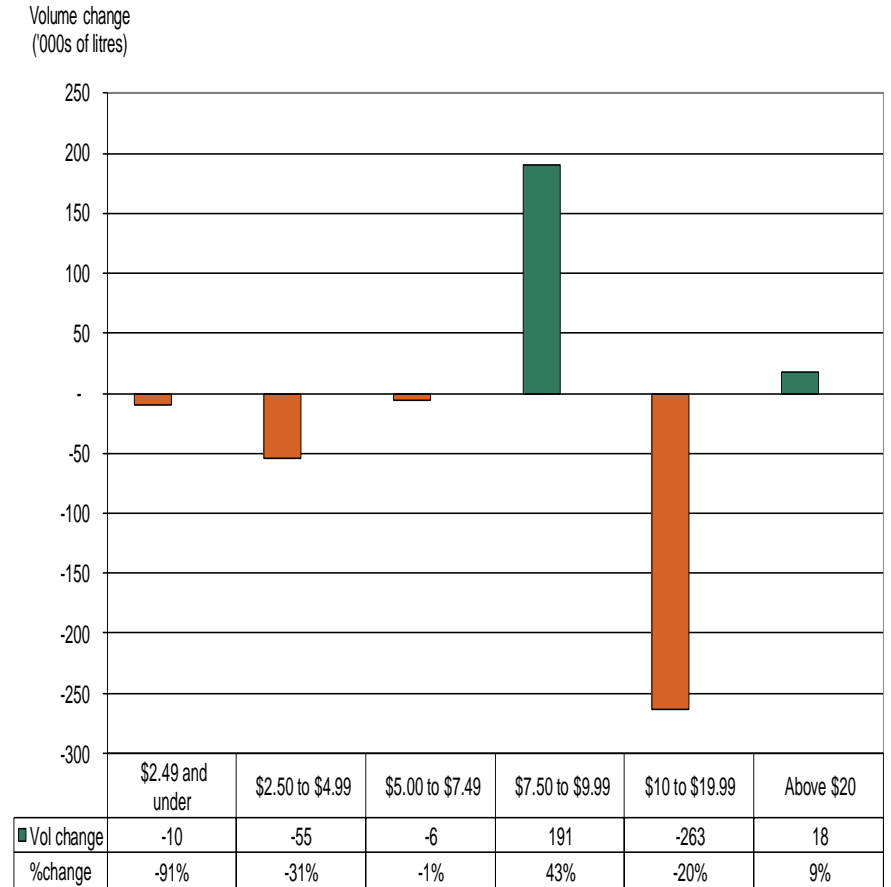
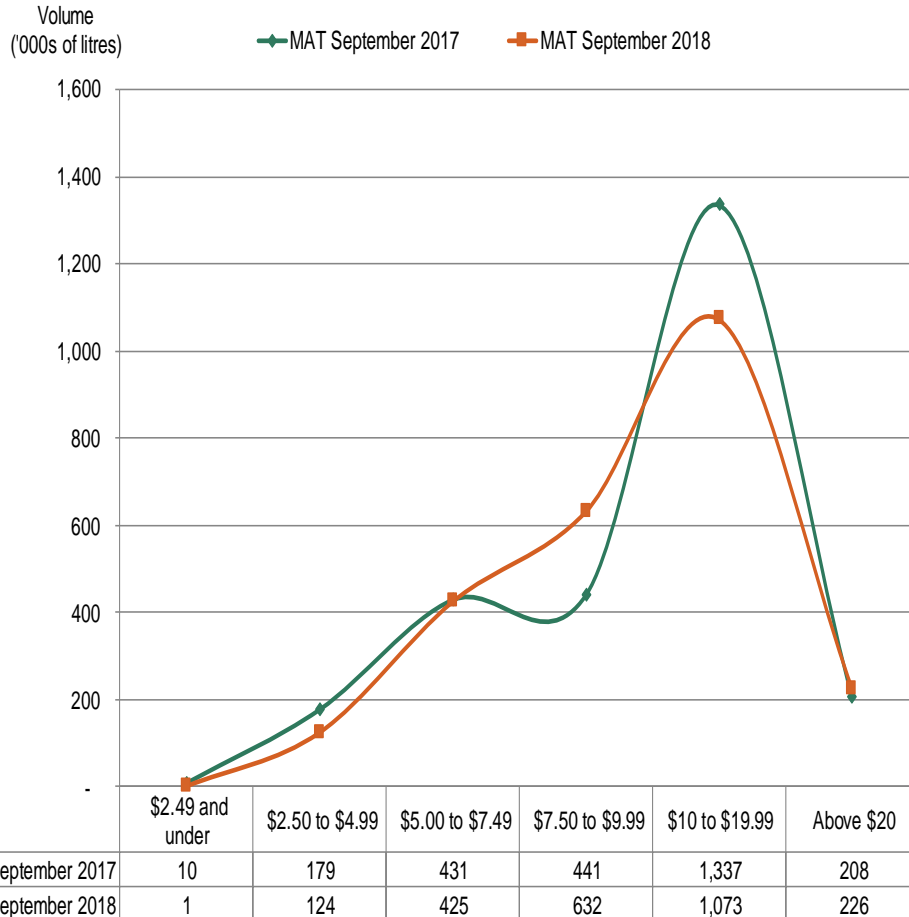


	China, Pr	United States Of America	United Kingdom	Singapore	Canada	Hong Kong	Thailand	New Zealand	United Arab Emirates	Japan	Ship	Sweden	Malaysia	Indonesia	France	Other
MAT September 2018	\$11.35	\$11.83	\$11.08	\$14.95	\$13.28	\$13.79	\$10.57	\$9.28	\$14.51	\$15.59	\$11.46	\$11.37	\$13.52	\$14.82	\$11.06	\$11.24
MAT September 2017	\$11.33	\$11.82	\$10.67	\$14.28	\$12.37	\$15.62	\$8.88	\$9.33	\$17.41	\$15.21	\$11.22	\$17.83	\$11.58	\$14.48	\$10.99	\$13.41

Bottled exports by price point

Volume ('000 litres)

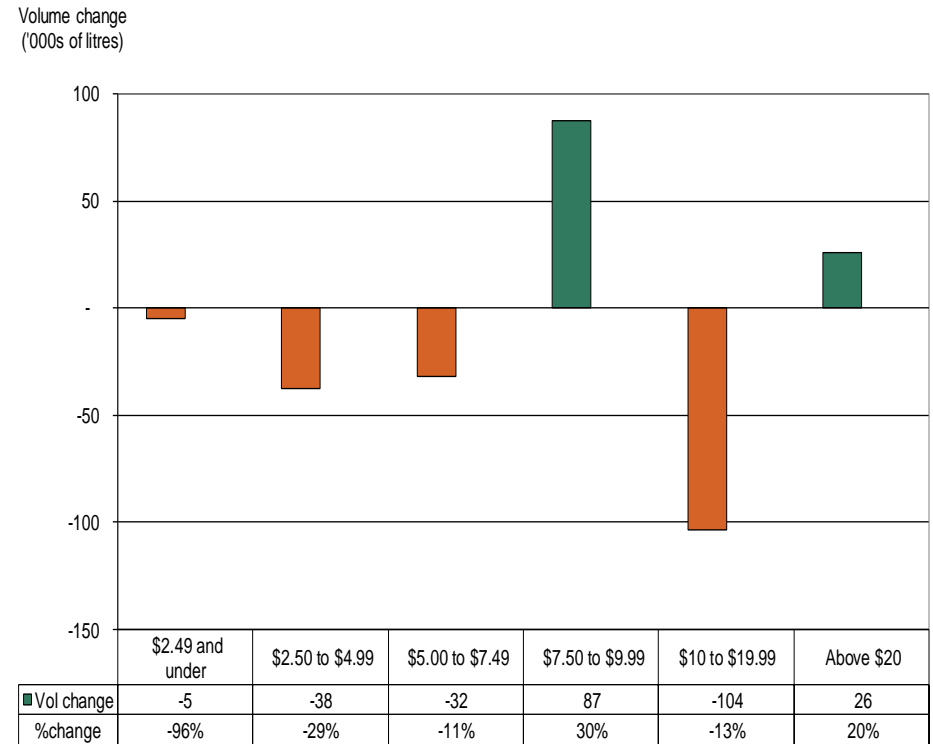
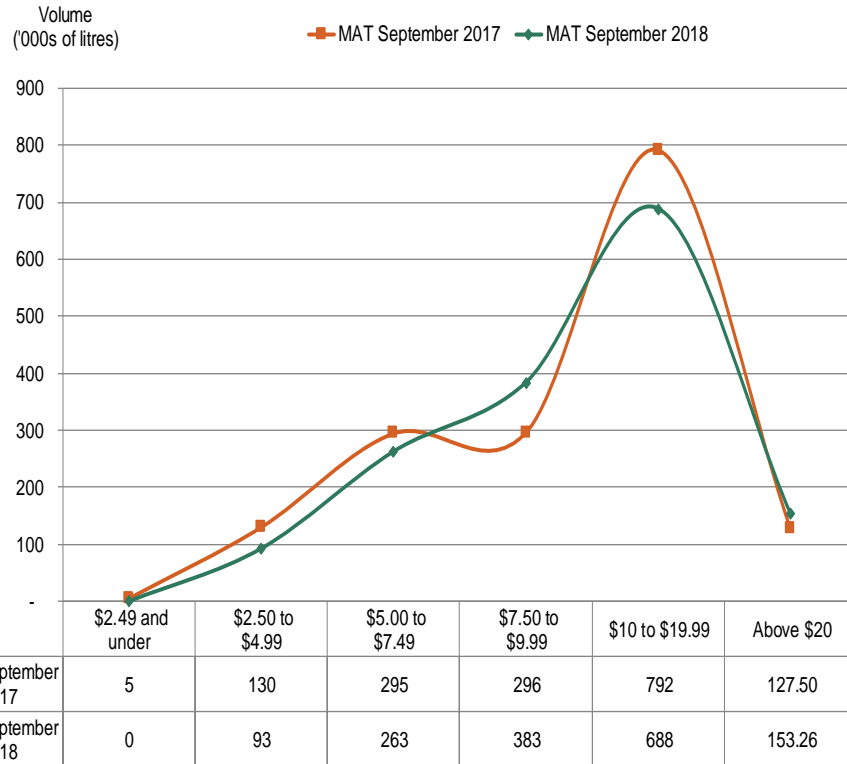
Change in volume



Bottled red wine exports by price point

Volume ('000 litres)

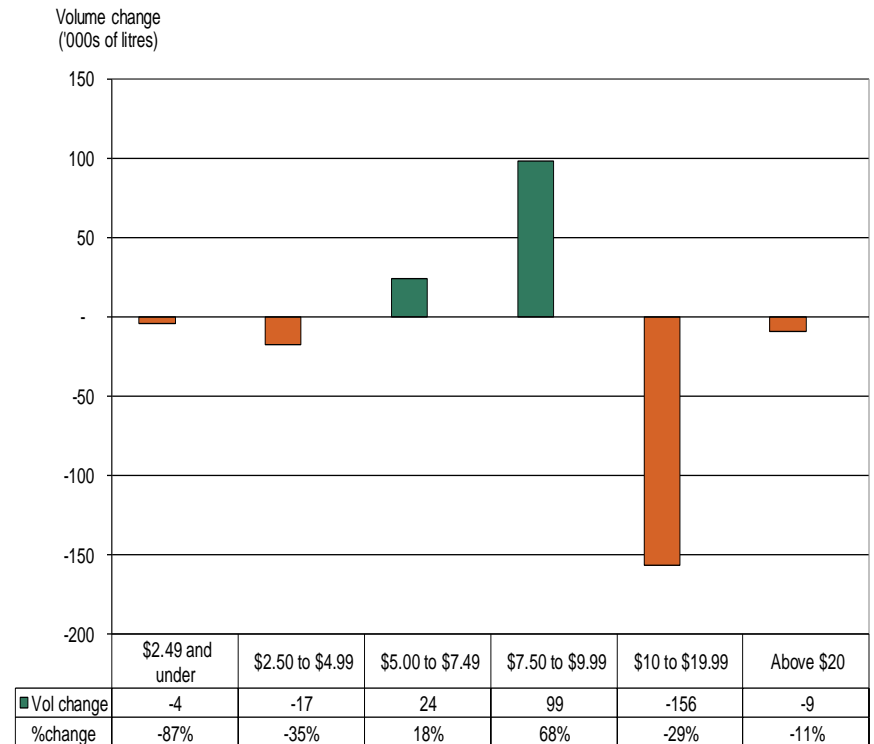
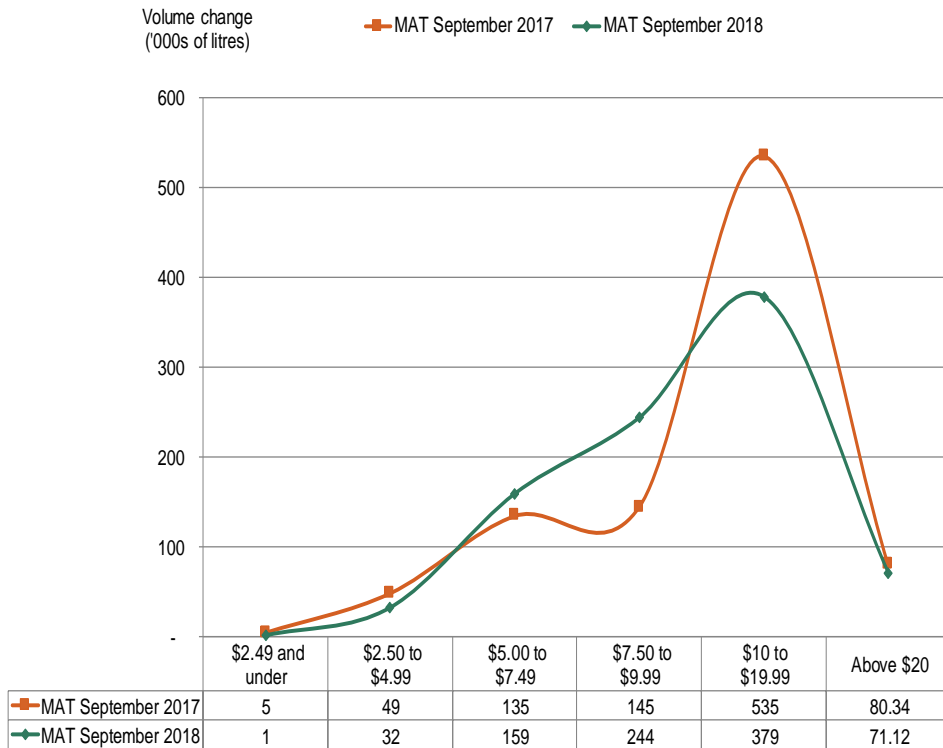
Change in volume



Bottled white wine exports by price point

Volume ('000 litres)

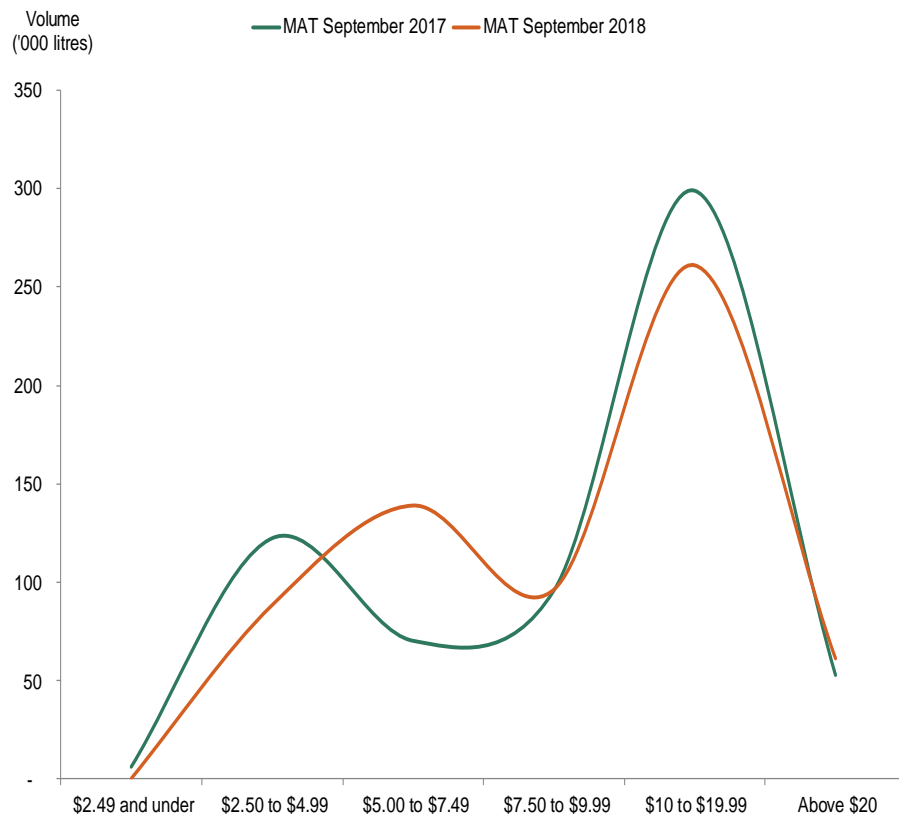
Change in volume



Bottled wine exports to China, Pr

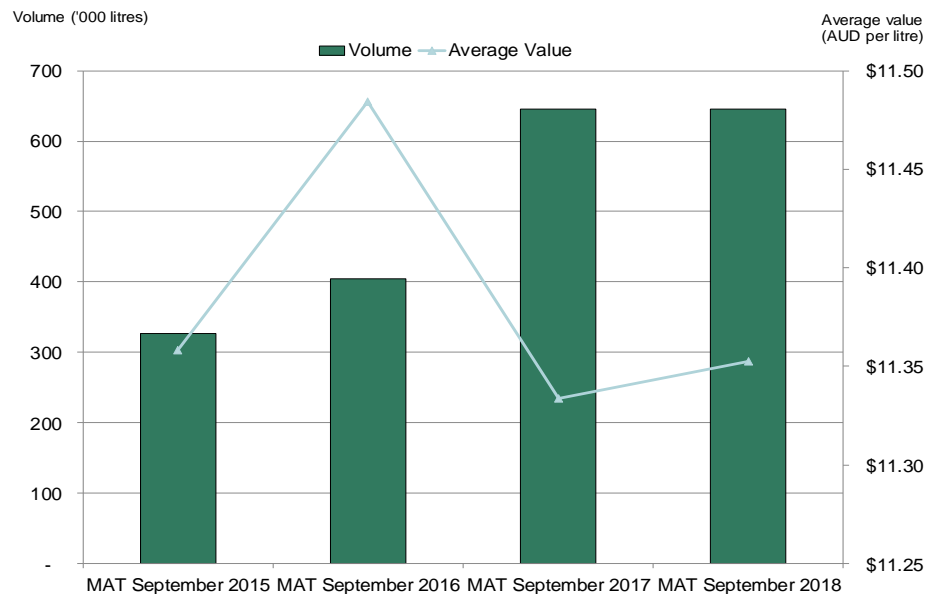
Overview

Total wine by price point



		MAT September 2017	MAT September 2018	Change
Red wine	Volume (litres)	562,502	543,170	-3%
	Value (AUD)	\$6,431,581	\$6,229,035	-3%
	Average value	\$11.43	\$11.47	0%
White wine	Volume (litres)	74,361	94,346	27%
	Value (AUD)	\$782,989	\$1,007,399	29%
	Average value	\$10.53	\$10.68	1%
Total wine	Volume (litres)	645,161	645,467	0%
	Value (AUD)	\$7,312,155	\$7,327,649	0%
	Average value	\$11.33	\$11.35	0%

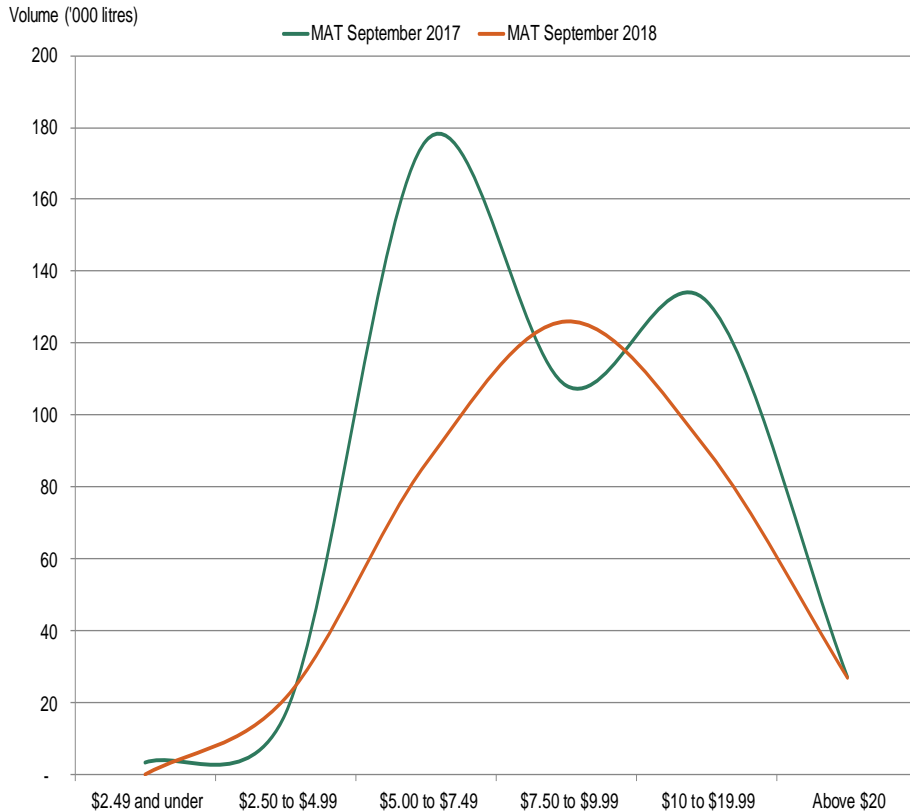
Total volume and average value



Bottled wine exports to United Kingdom

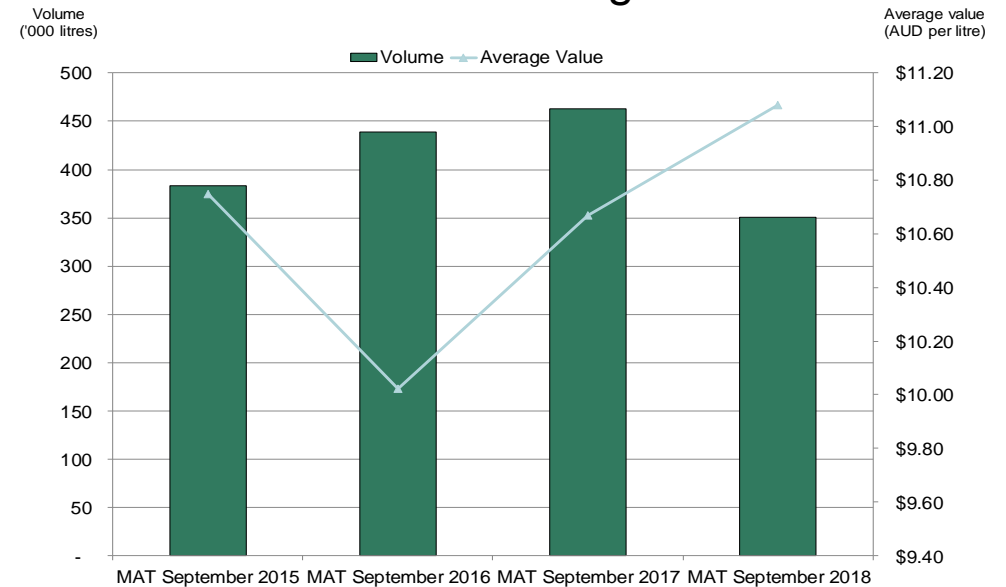
Overview

Total wine by price point



		MAT September 2017	MAT September 2018	Change
Red wine	Volume (litres)	307,091	204,271	-33%
	Value (AUD)	\$3,102,608	\$2,274,237	-27%
	Average value	\$10.10	\$11.13	10%
White wine	Volume (litres)	155,132	145,805	-6%
	Value (AUD)	\$1,827,958	\$1,604,595	-12%
	Average value	\$11.78	\$11.01	-7%
Total wine	Volume (litres)	463,014	350,561	-24%
	Value (AUD)	\$4,939,386	\$3,884,223	-21%
	Average value	\$10.67	\$11.08	4%

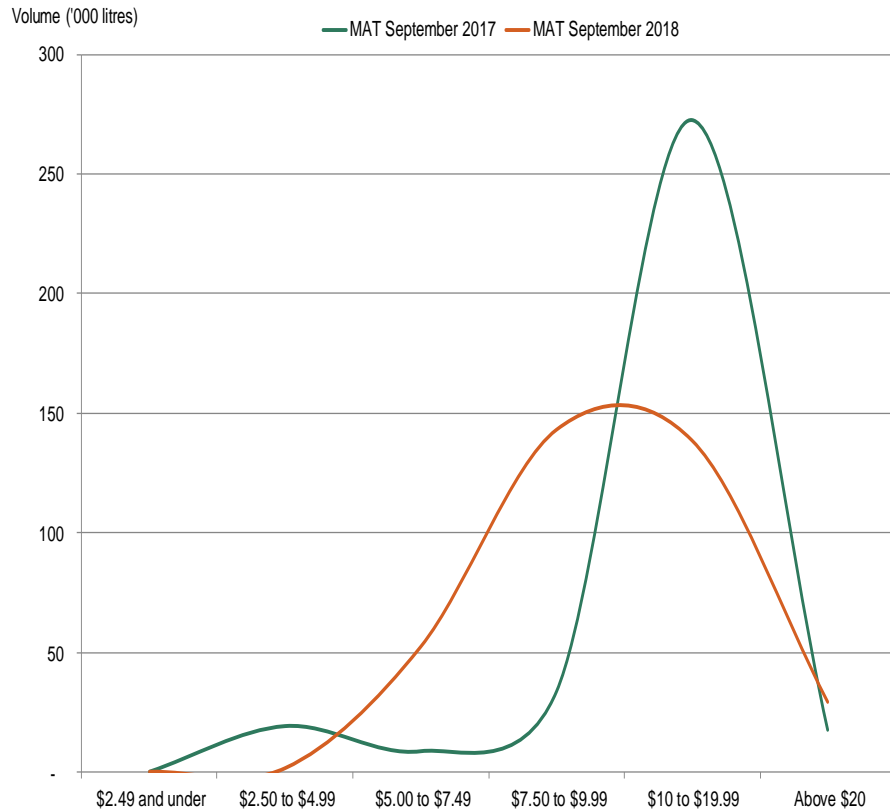
Total volume and average value



Bottled wine exports to United States Of America

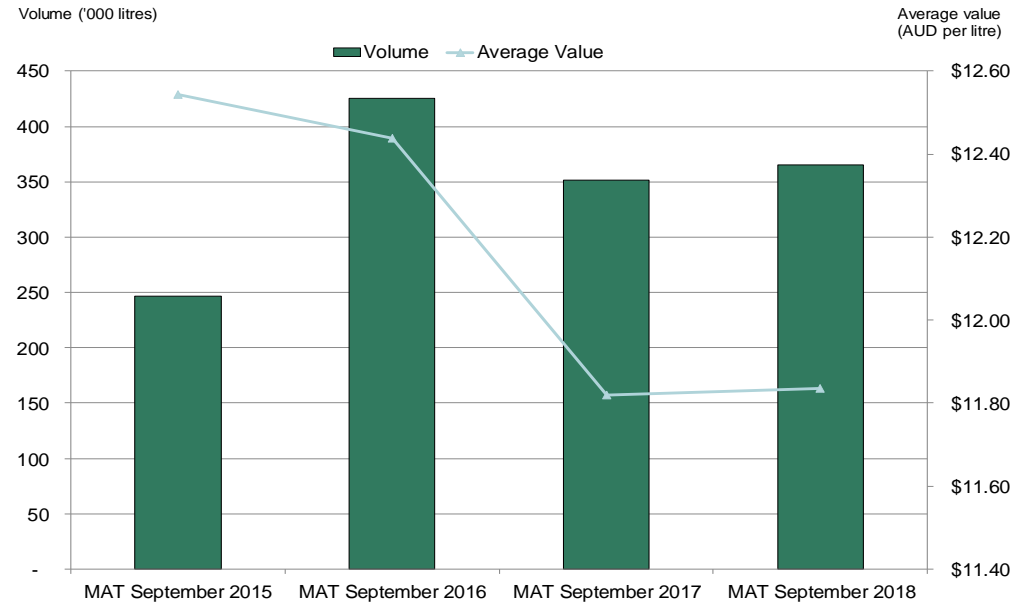
Overview

Total wine by price point



		MAT September 2017	MAT September 2018	Change
Red wine	Volume (litres)	95,522	157,397	65%
	Value (AUD)	\$1,264,035	\$2,034,499	61%
	Average value	\$13.23	\$12.93	-2%
White wine	Volume (litres)	255,551	206,150	-19%
	Value (AUD)	\$2,885,322	\$2,257,507	-22%
	Average value	\$11.29	\$10.95	-3%
Total wine	Volume (litres)	351,072	365,256	4%
	Value (AUD)	\$4,149,358	\$4,322,508	4%
	Average value	\$11.82	\$11.83	0%

Total volume and average value

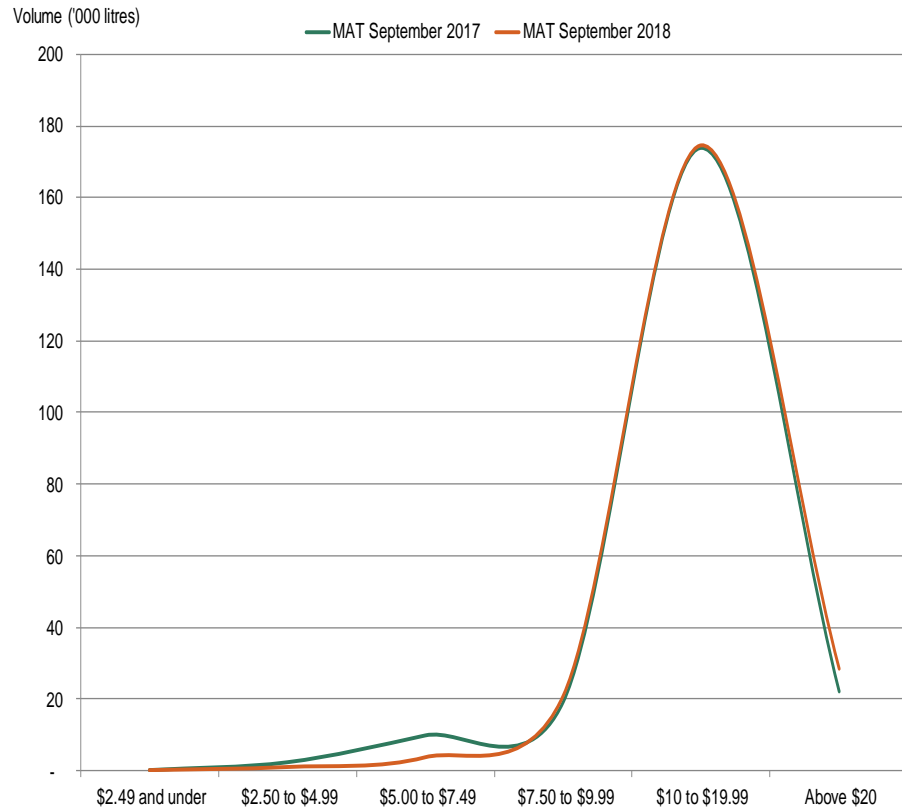


MAT September 2018

Bottled wine exports to Singapore

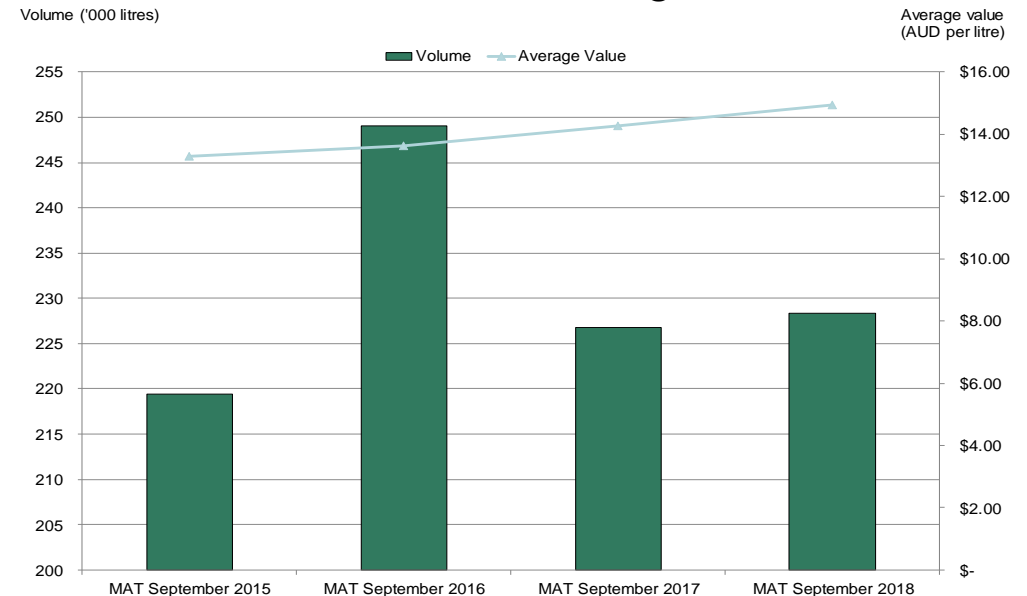
Overview

Total wine by price point



		MAT September 2017	MAT September 2018	Change
Red wine	Volume (litres)	139,125	125,013	-10%
	Value (AUD)	\$2,080,785	\$1,964,663	-6%
	Average value	\$14.96	\$15.72	5%
White wine	Volume (litres)	86,066	101,972	18%
	Value (AUD)	\$1,139,009	\$1,432,658	26%
	Average value	\$13.23	\$14.05	6%
Total wine	Volume (litres)	226,757	228,326	1%
	Value (AUD)	\$3,237,734	\$3,413,779	5%
	Average value	\$14.28	\$14.95	5%

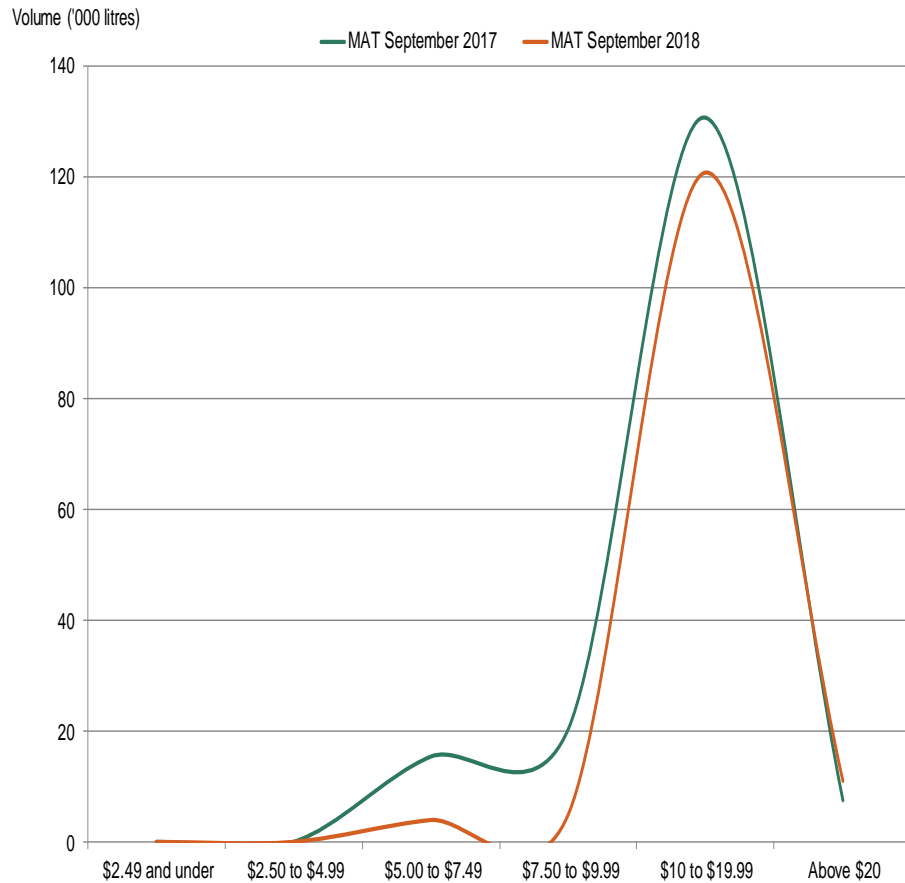
Total volume and average value



Bottled wine exports to Canada

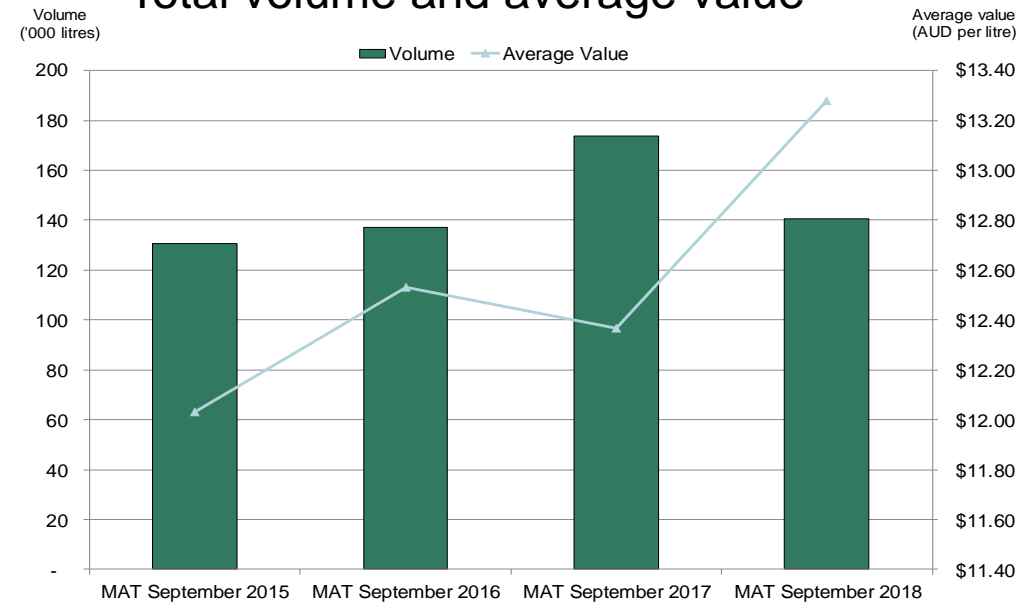
Overview

Total wine by price point



		MAT September 2017	MAT September 2018	Change
Red wine	Volume (litres)	132,071	106,503	-19%
	Value (AUD)	\$1,646,429	\$1,391,862	-15%
	Average value	\$12.47	\$13.07	5%
White wine	Volume (litres)	41,814	33,827	-19%
	Value (AUD)	\$503,745	\$469,217	-7%
	Average value	\$12.05	\$13.87	15%
Total wine	Volume (litres)	173,885	140,600	-19%
	Value (AUD)	\$2,150,174	\$1,866,673	-13%
	Average value	\$12.37	\$13.28	7%

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.