

Wine
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Wine

Western Australia
Export Report
MAT December 2018

Important reading

- This report is updated quarterly.
- All data, unless specifically stated, is for the moving annual total (MAT), in other words for the last 12 months to the month ending that is stated on the front cover. All growth rates are for the annual change to this same period
- The “Estimate of overall state by state” exports table (page 3) represents an estimate of all exports (bulk and bottled) by state. This estimate is arrived upon by summing all regional label claims for each respective state and attributing the “South Eastern Australia” label claim and “no label claim” exports to each state according to share of winegrape crush. (See ‘Notes and definitions’ at the end of the document for further information.)
- The remainder of this report (page 5 onwards) only represents bottled wine and wine exported in bulk containers is not included.
- The data presented is an aggregation of the state’s regions (see page 5)
- All data presented is for when the report’s region is the primary GI which is labelled on the bottle. 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
- A similar scenario will occur when the wine is not regionally identified. For example the same Yarra Valley/King Valley wine which is not identified with a GI on the bottle will be included in a report as ‘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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Estimate of overall state by state exports

	MAT December 2018		Change %	
	Volume (million L)	Value (million AUD)	Volume	Value
SA	411	\$1,758	5%	13%
NSW	247	\$533	8%	7%
VIC	181	\$455	0%	4%
WA	9.6	\$65	21%	9%
TAS	0.9	\$7	8%	5%
QLD	0.2	\$2	121%	53%
ACT	0.0	\$0	-59%	-51%
Total	850	\$2,821	5%	10%

Please note: This estimate is arrived upon by summing all regional label claims for each respective state and attributing the "South Eastern Australia" label claim and "no label claim" exports to each state according to share of winegrape crush.

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All state GI claims

Location claim	Volume		Value		Average Value	
	('000 litres)	Change	('000 AUD)	Change	AUD per litre	Change
Margaret River	2,490	-5%	\$30,165	-5%	\$12.12	0%
Western Australia	1,508	18%	\$10,035	19%	\$6.65	1%
Frankland River	435	15%	\$4,026	18%	\$9.26	2%
Great Southern	221	16%	\$2,454	27%	\$11.12	9%
South West Australia	158	126%	\$934	76%	\$5.91	-22%
Geographe	113	12%	\$931	12%	\$8.23	0%
Mount Barker	103	48%	\$854	6%	\$8.27	-29%
Manjimup	62	-32%	\$446	-6%	\$7.20	37%
Pemberton	54	116%	\$514	75%	\$9.52	-19%
Perth Hills	26	233%	\$288	355%	\$11.02	36%
Swan Valley	24	-16%	\$212	36%	\$8.90	62%
Frankland	17	366%	\$192	369%	\$11.34	1%
Blackwood Valley	10	-36%	\$90	-25%	\$9.29	18%
Denmark	8	9%	\$160	42%	\$21.04	30%
Greater Perth	4	9730%	\$32	8447%	\$7.25	-13%
Swan District	4	-66%	\$39	-58%	\$10.08	23%
Porongurup	3	-32%	\$54	-2%	\$15.76	44%
Peel	1	2025%	\$2	368%	\$2.93	-78%

GI claims over time

	Volume		Value		Average Value AUD per litre	
	'000 litres	Change	'000 AUD	Change	litre	Change
MAT December 2010	4,826	-6%	\$38,929	-4%	\$8.07	2%
MAT December 2011	6,012	25%	\$47,542	22%	\$7.91	-2%
MAT December 2012	5,729	-5%	\$45,679	-4%	\$7.97	1%
MAT December 2013	4,827	-16%	\$39,639	-13%	\$8.21	3%
MAT December 2014	4,314	-11%	\$36,895	-7%	\$8.55	4%
MAT December 2015	4,096	-5%	\$38,427	4%	\$9.38	10%
MAT December 2016	4,692	15%	\$45,206	18%	\$9.63	3%
MAT December 2017	4,892	4%	\$49,164	9%	\$10.05	4%
MAT December 2018	5,240	7%	\$51,429	5%	\$9.81	-2%

GI claims by country and year

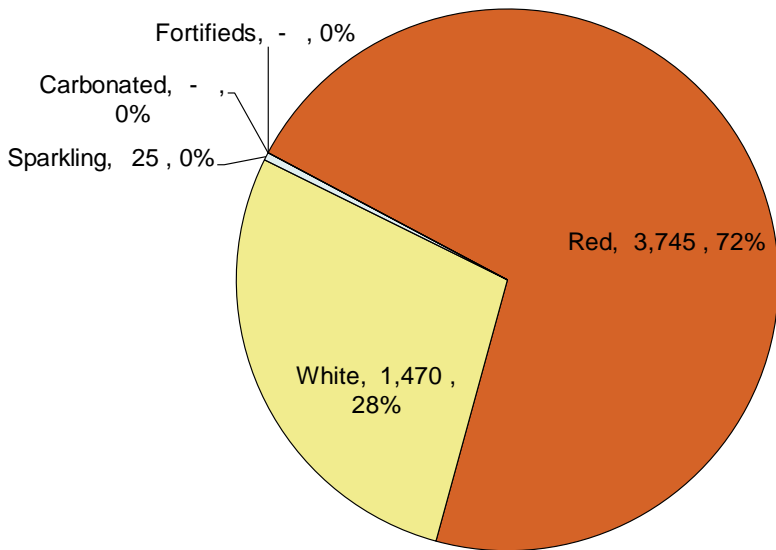
	MAT December									
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Volume ('000 litres)										
Canada	241	341	487	347	341	255	190	227	179	177
China, Pr	1,071	870	1,503	1,703	1,475	1,322	1,209	1,613	2,091	2,353
Denmark	81	79	81	102	72	96	84	76	49	56
Finland	11	10	99	99	80	57	121	114	150	117
France	59	52	78	69	87	58	48	38	49	9
Hong Kong	556	334	537	705	584	413	284	304	273	310
Japan	155	135	129	110	111	85	81	73	62	70
Malaysia	73	45	85	67	67	64	73	44	60	60
New Zealand	86	59	56	71	52	111	81	100	101	110
Ship	34	62	84	79	98	31	97	123	101	88
Singapore	236	321	288	265	239	238	302	284	281	242
Thailand	44	70	73	88	71	60	64	108	92	120
United Arab Emirates	119	95	67	141	182	97	72	134	85	45
United Kingdom	1,150	1,261	1,469	934	694	710	788	729	586	603
United States Of America	692	605	500	532	380	494	371	490	414	424
Value ('000 AUD)										
Canada	2,537	3,053	4,016	3,072	2,805	2,288	2,116	2,589	2,164	2,231
China, Pr	6,852	6,312	12,533	13,213	11,038	9,210	9,726	13,157	17,839	20,096
Denmark	546	589	659	777	504	717	724	687	509	569
Finland	41	61	606	609	572	425	911	815	1,055	940
France	732	709	778	677	954	694	485	448	491	134
Hong Kong	3,059	2,685	3,901	4,190	3,269	2,763	2,592	3,038	3,172	3,530
Japan	1,994	1,522	1,540	1,782	1,152	1,077	998	905	846	958
Malaysia	622	504	776	789	687	694	777	523	706	658
New Zealand	705	587	499	657	494	883	709	843	918	968
Ship	469	714	989	846	913	319	782	1,064	923	902
Singapore	3,348	3,497	3,336	3,262	3,106	3,000	3,891	3,710	3,903	3,441
Thailand	333	567	569	645	636	451	522	1,001	812	1,214
United Arab Emirates	1,149	849	846	1,341	1,718	1,114	799	1,130	1,233	606
United Kingdom	8,030	8,528	8,791	6,408	5,223	5,901	6,755	6,598	5,973	5,541
United States Of America	5,036	4,327	3,273	3,709	3,480	4,928	4,176	5,764	4,978	4,812

Bottled exports by price point and destination

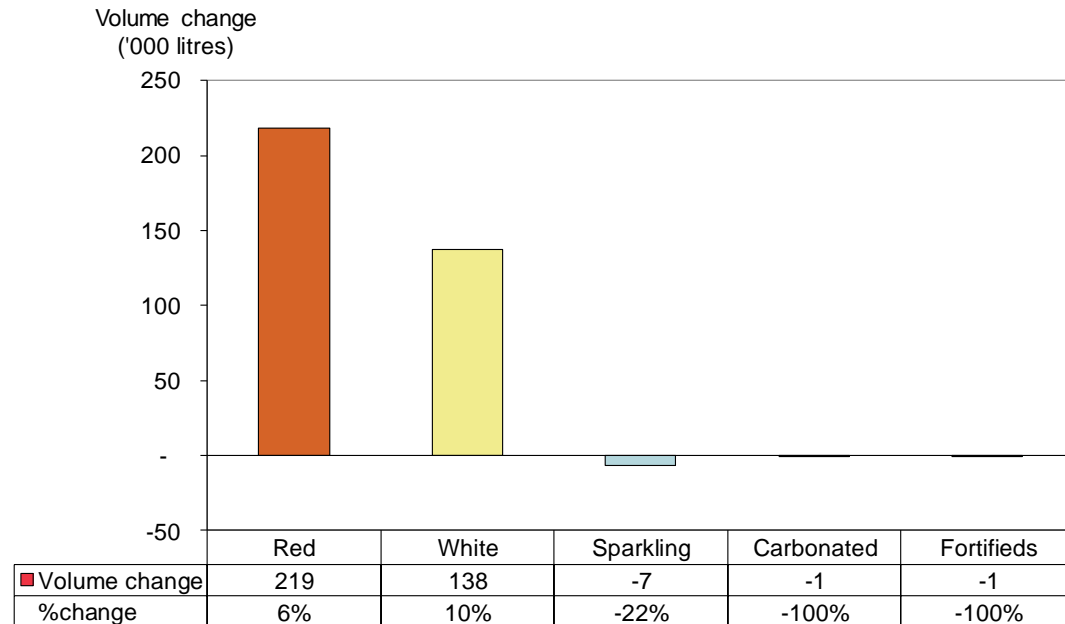
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10 to \$19.99		Above \$20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
China, Pr	29.2	31%	463.2	-7%	830.4	19%	329.0	15%	588.0	24%	113.6	3%	2,353.3	13%
United States Of America	0.5	na	6.5	-49%	45.3	-4%	189.2	225%	155.1	-42%	27.1	0%	423.6	2%
Japan	-	na	-	na	11.0	36%	12.1	-4%	39.2	16%	8.3	4%	70.5	13%
Hong Kong	0.1	-58%	3.1	-32%	48.1	-6%	133.9	11%	100.4	47%	24.2	-12%	309.8	14%
Canada	0.3	na	2.2	41%	12.6	-27%	14.3	-53%	137.8	16%	10.4	-6%	177.5	-1%
Malaysia	-	-100%	5.5	38%	12.7	26%	19.0	32%	17.3	-32%	5.4	0%	59.8	-1%
New Zealand	-	na	10.5	1208%	56.1	-10%	15.5	-9%	22.0	39%	5.5	6%	109.6	8%
Singapore	-	na	3.9	43%	15.2	-33%	28.8	-5%	164.1	-17%	30.1	9%	242.2	-14%
Thailand	-	na	2.5	-80%	9.9	-65%	71.5	150%	32.2	50%	4.4	284%	120.4	31%
United Arab Emirates	-	-100%	-	na	4.5	-25%	5.3	-62%	31.9	-42%	3.1	-68%	44.7	-47%
United Kingdom	-	-100%	136.8	370%	187.1	-24%	151.9	18%	98.0	-34%	29.7	0%	603.4	3%
Denmark	-	na	-	na	12.4	-37%	33.0	107%	7.2	-33%	3.0	9%	55.6	13%
Finland	-	na	-	na	15.5	-87%	99.3	208%	2.2	4%	-	na	117.0	-22%
Ship	-	-100%	2.0	na	27.4	-47%	9.2	-6%	47.2	30%	1.8	0%	87.5	-13%
Sweden	-	na	-	na	97.3	161%	42.1	1070%	5.5	39%	3.7	266%	148.6	224%
Other	0.5	200%	2.1	-79%	96.3	72%	66.1	-42%	118.8	4%	32.6	19%	316.5	-2%
Total	30.6	5%	638.4	11%	1,481.6	0%	1,220.2	33%	1,566.6	-2%	302.8	3%	5,240.1	7%

Bottled exports by colour/wine style

Volume ('000 litres)

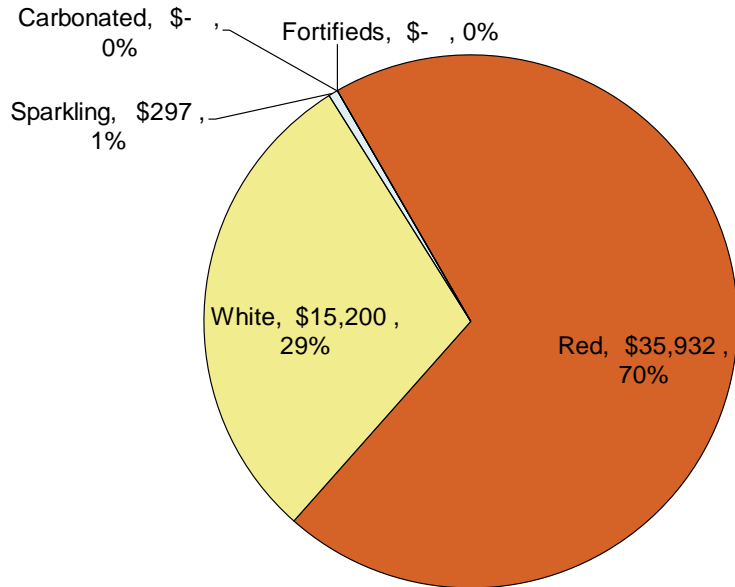


Change in volume

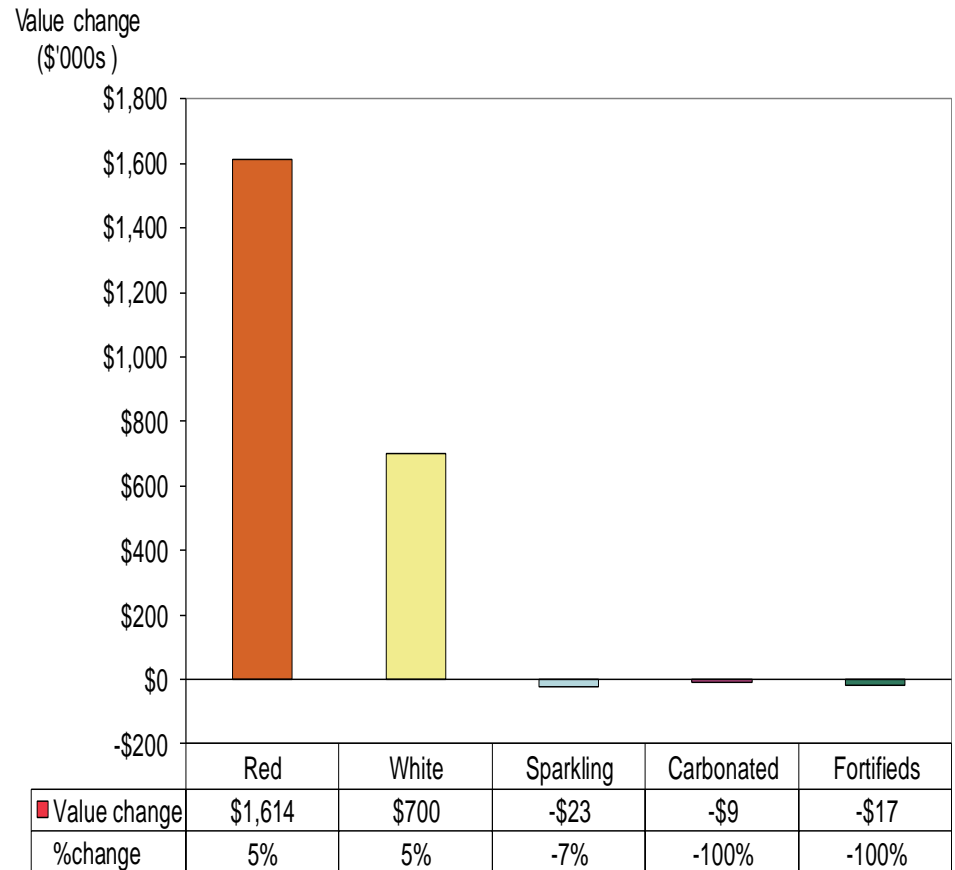


Bottled exports by colour/wine style

Value ('000 AUD)

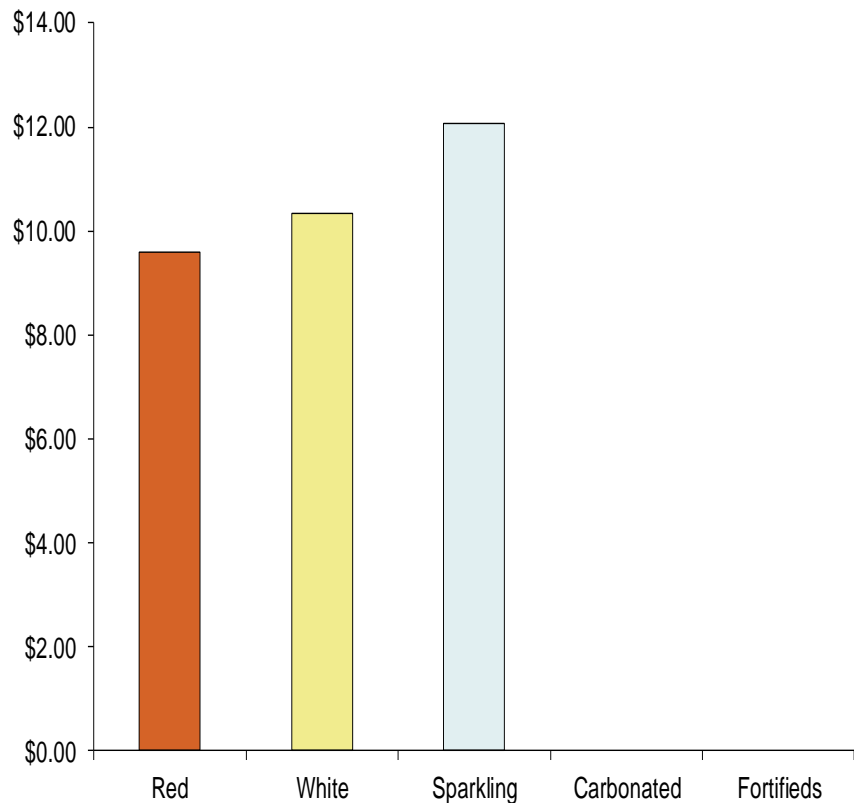


Change in value



Bottled exports by colour/wine style

Average value (AUD per litre)

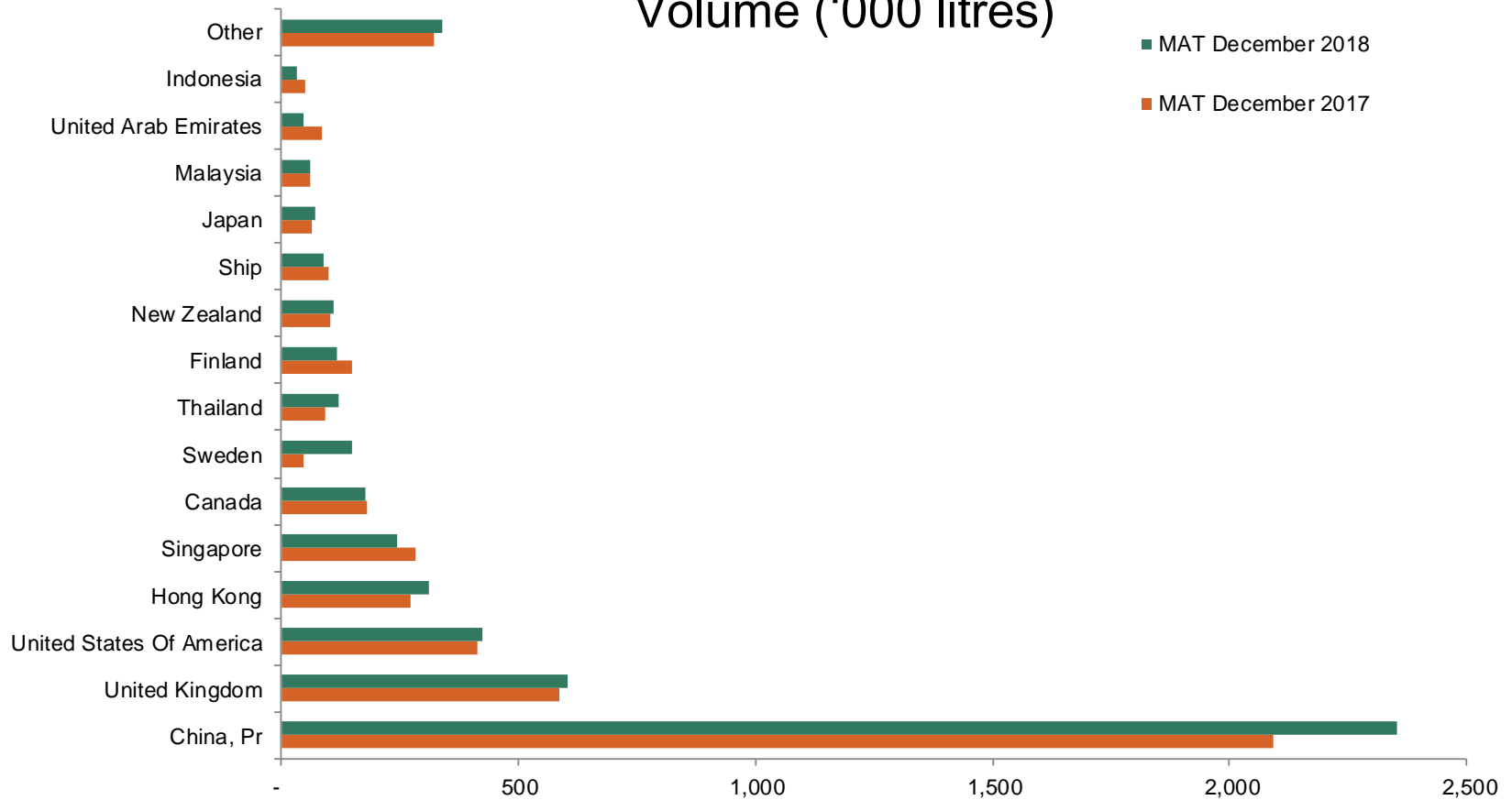


Change in average value



Bottled exports to top 15 destinations

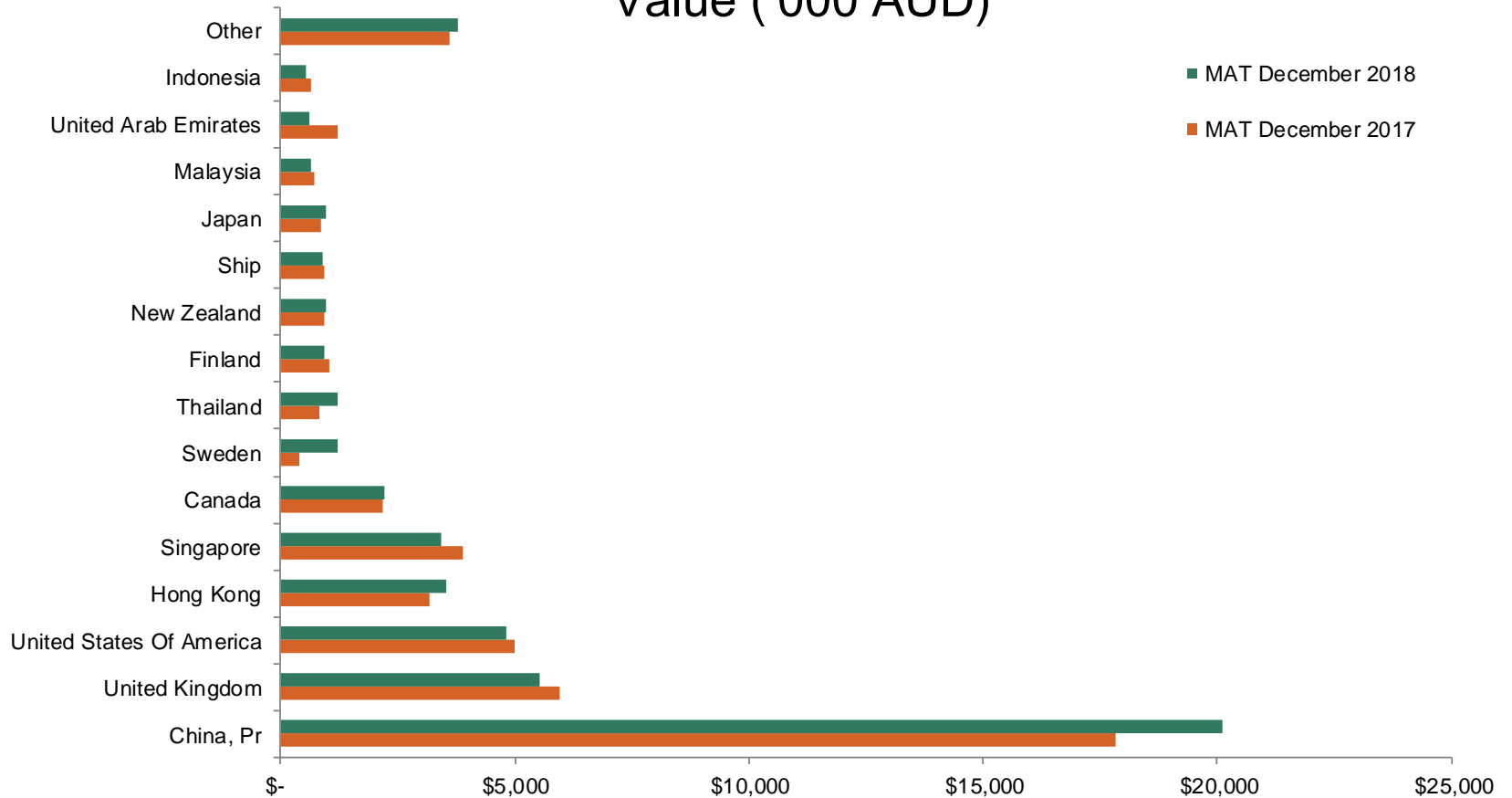
Volume ('000 litres)



	China, Pr	United Kingdom	United States Of America	Hong Kong	Singapore	Canada	Sweden	Thailand	Finland	New Zealand	Ship	Japan	Malaysia	United Arab Emirates	Indonesia	Other
■ MAT December 2018	2,353	603	424	310	242	177	149	120	117	110	88	70	60	45	34	338
■ MAT December 2017	2,091	586	414	273	281	179	46	92	150	101	101	62	60	85	51	320

Bottled exports by top 15 destinations

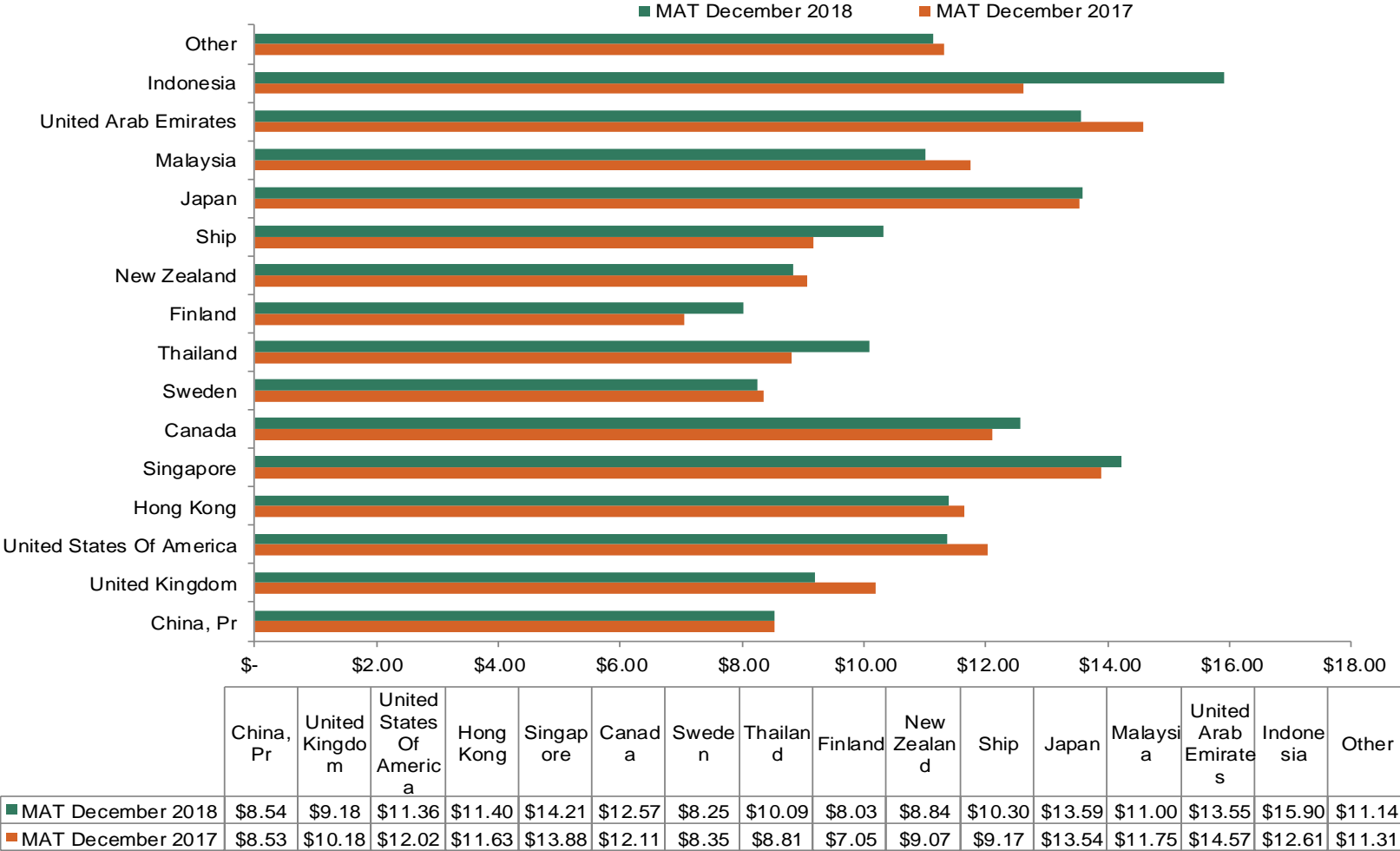
Value ('000 AUD)



	China, Pr	United Kingdom	United States Of America	Hong Kong	Singapore	Canada	Sweden	Thailand	Finland	New Zealand	Ship	Japan	Malaysia	United Arab Emirates	Indonesia	Other
■ MAT December 2018	\$20,09	\$5,541	\$4,812	\$3,530	\$3,441	\$2,231	\$1,226	\$1,214	\$940	\$968	\$902	\$958	\$658	\$606	\$535	\$3,769
■ MAT December 2017	\$17,83	\$5,973	\$4,978	\$3,172	\$3,903	\$2,164	\$383	\$812	\$1,055	\$918	\$923	\$846	\$706	\$1,233	\$645	\$3,615

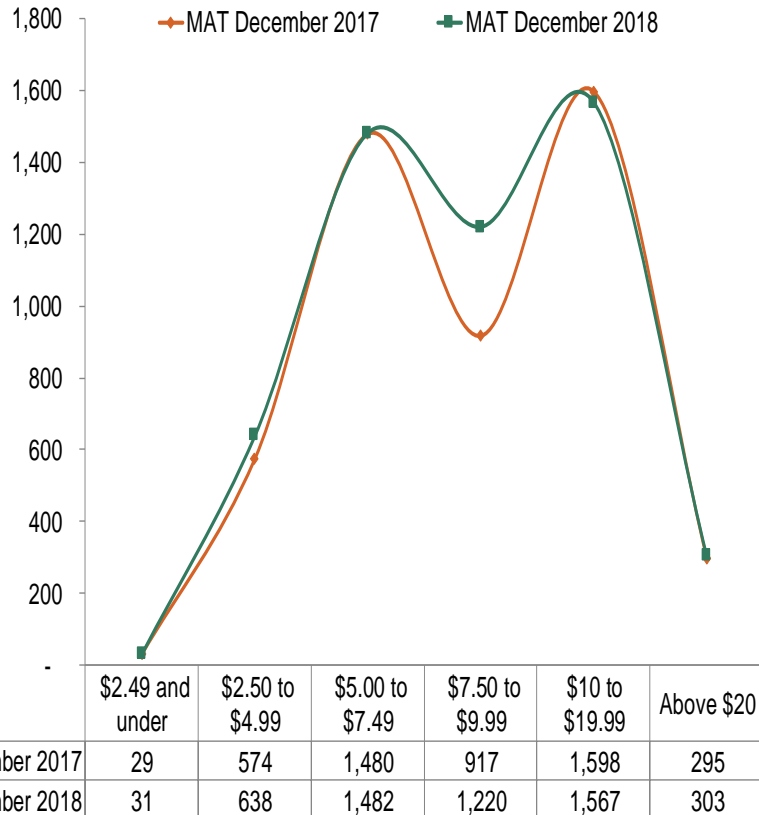
Bottled exports by top 15 destinations

Average value (AUD/litre FOB)

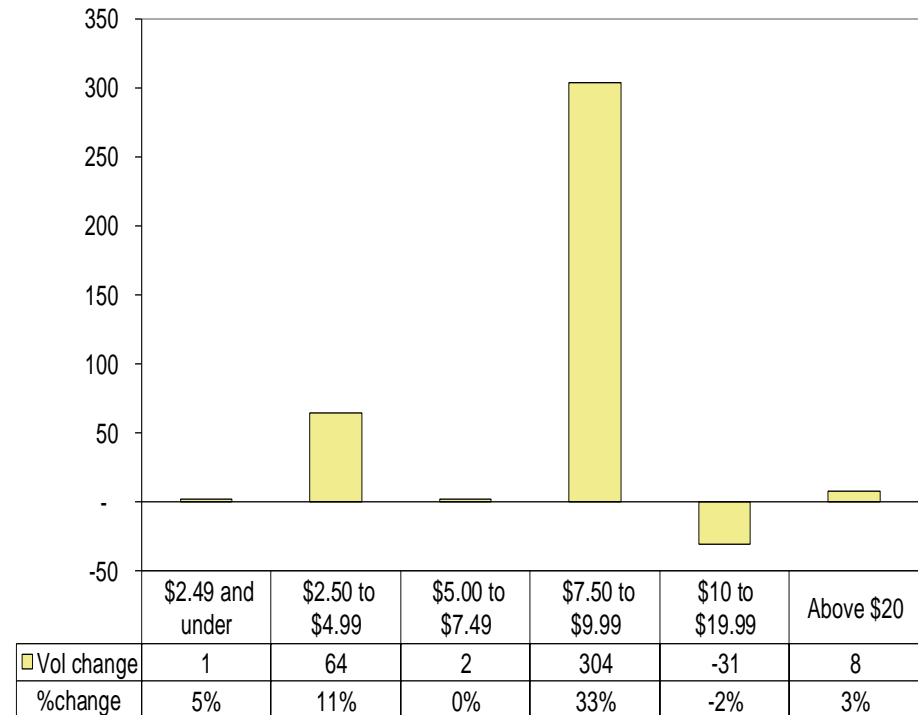


Bottled exports by price point

Volume ('000 litres)

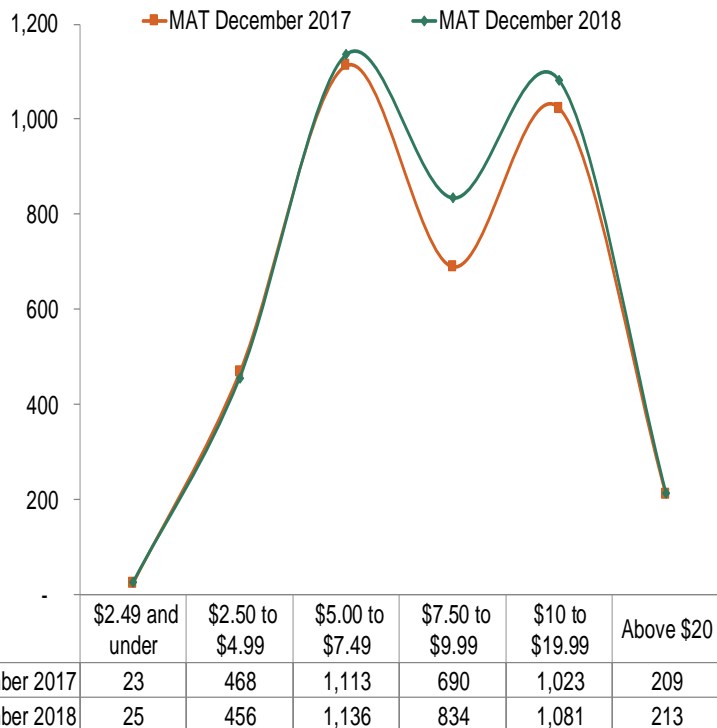


Change in volume

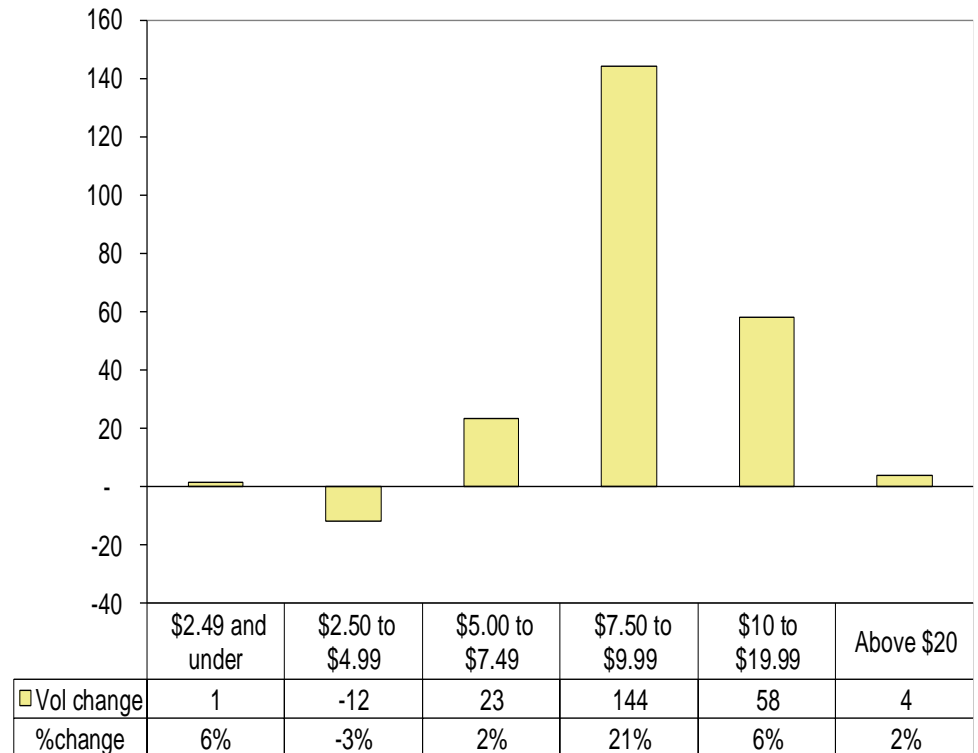


Bottled red wine exports by price point

Volume ('000 litres)

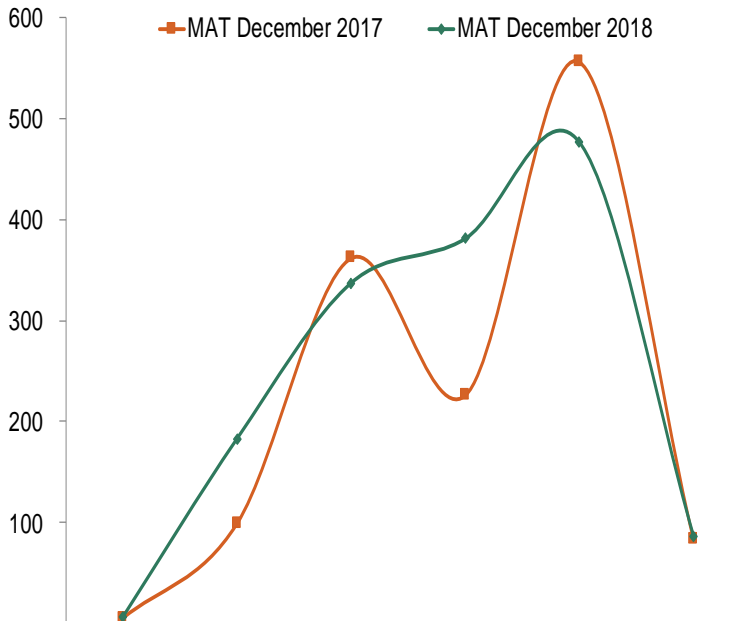


Change in volume



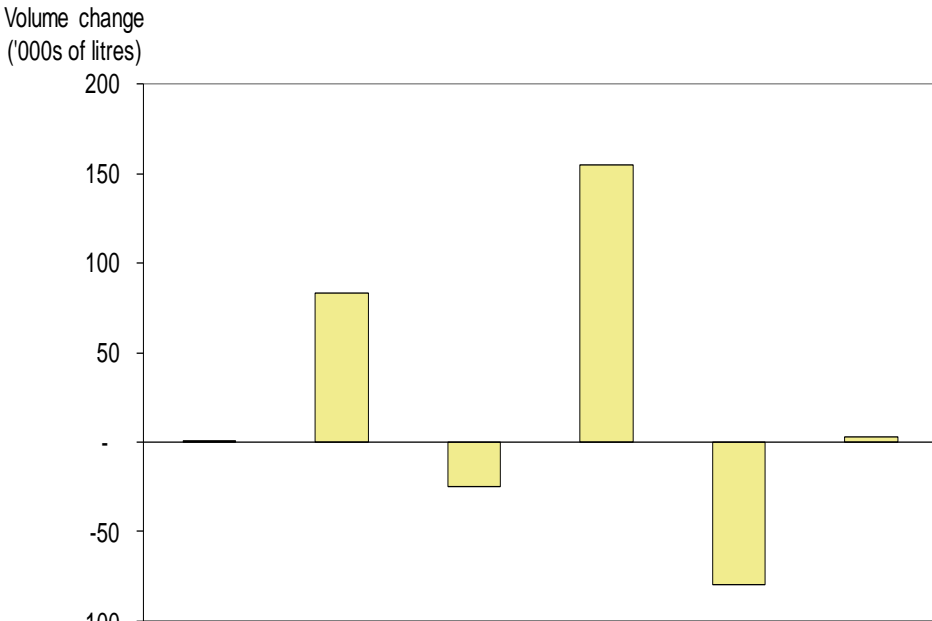
Bottled white wine exports by price point

Volume ('000 litres)



	\$2.49 and under	\$2.50 to \$4.99	\$5.00 to \$7.49	\$7.50 to \$9.99	\$10 to \$19.99	Above \$20
MAT December 2017	6	99	362	226	556	83.51
MAT December 2018	6	183	337	381	477	87

Change in volume

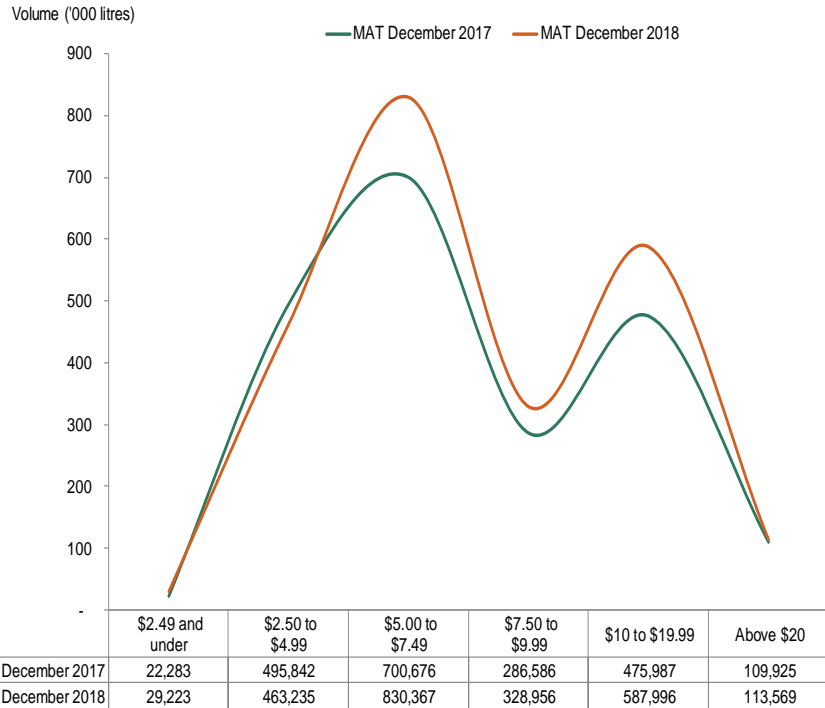


	\$2.49 and under	\$2.50 to \$4.99	\$5.00 to \$7.49	\$7.50 to \$9.99	\$10 to \$19.99	Above \$20
Vol change	0	83	-25	155	-79	3
%change	3%	84%	-7%	69%	-14%	4%

Bottled wine exports to China, Pr

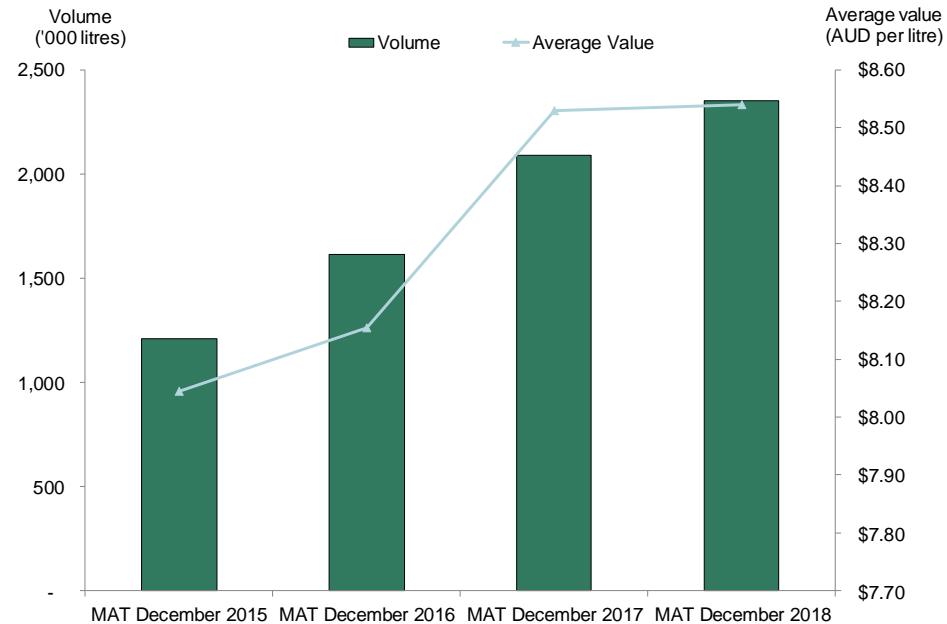
Overview

Total wine by price point



		MAT December 2017	MAT December 2018	Change
Red wine	Volume (litres)	1,876,724	2,162,381	15%
	Value (AUD)	\$16,068,900	\$18,196,388	13%
	Average value	\$8.56	\$8.41	-2%
White wine	Volume (litres)	189,080	177,919	-6%
	Value (AUD)	\$1,521,131	\$1,752,690	15%
	Average value	\$8.04	\$9.85	22%
Total wine	Volume (litres)	2,091,297	2,353,346	13%
	Value (AUD)	17,838,819	20,096,426	13%
	Average value	\$8.53	\$8.54	0%

Total volume and average value

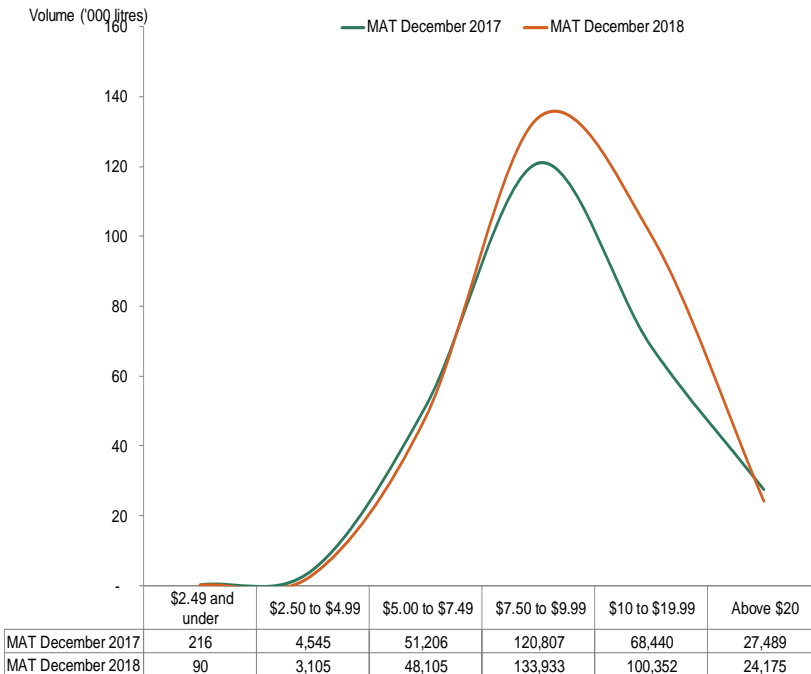


Bottled wine exports to Hong Kong

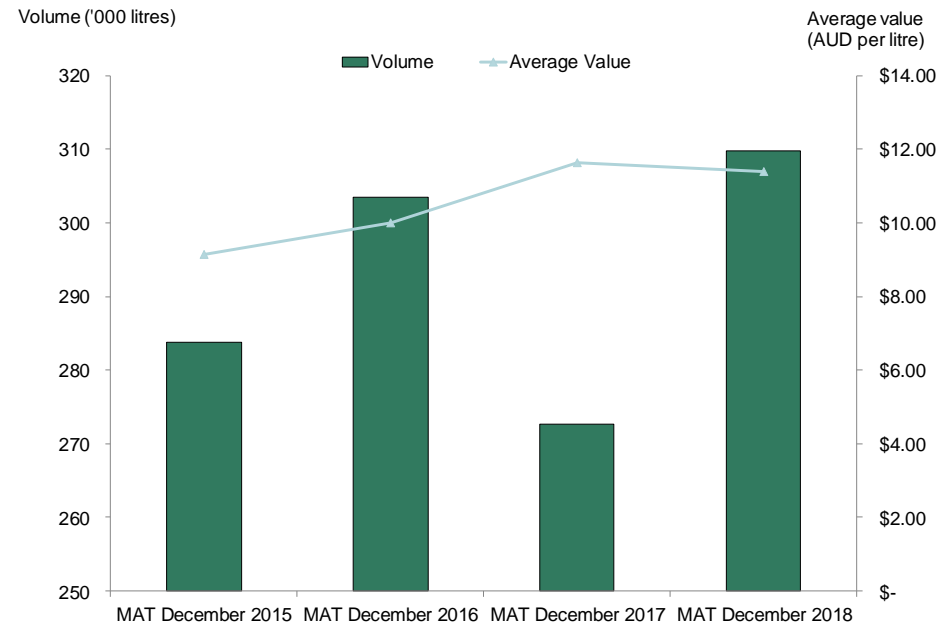
Overview

		MAT December 2017	MAT December 2018	Change
Red wine	Volume (litres)	198,179	203,668	3%
	Value (AUD)	\$2,302,860	\$2,202,584	-4%
	Average value	\$11.62	\$10.81	-7%
White wine	Volume (litres)	74,375	104,228	40%
	Value (AUD)	\$865,943	\$1,310,248	51%
	Average value	\$11.64	\$12.57	8%
Total wine	Volume (litres)	272,702	309,759	14%
	Value (AUD)	\$3,172,038	\$3,529,719	11%
	Average value	\$11.63	\$11.40	-2%

Total wine by price point



Total volume and average value

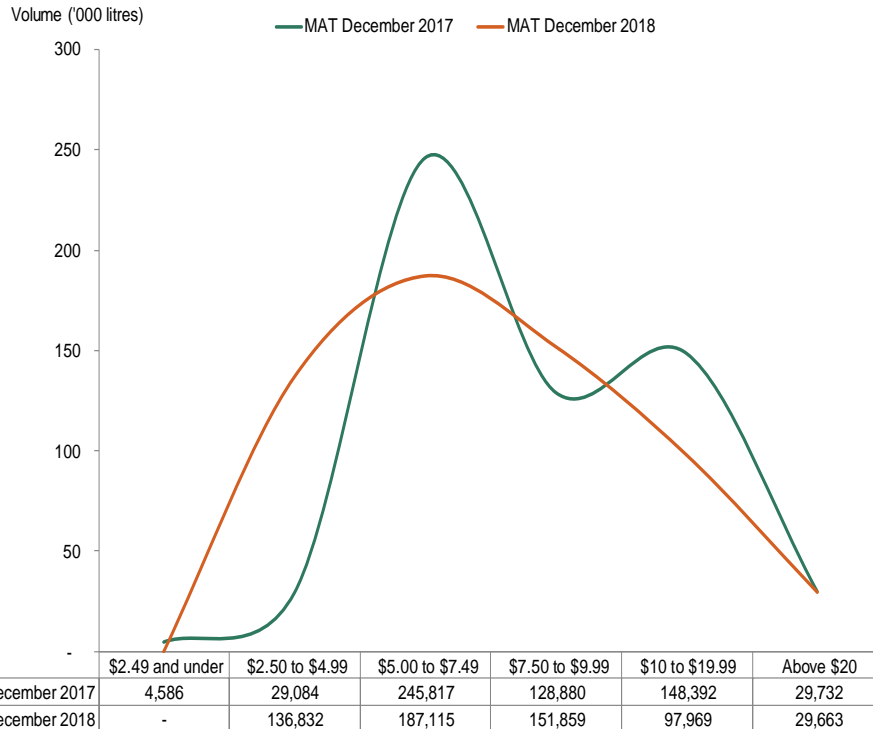


Bottled wine exports to United Kingdom

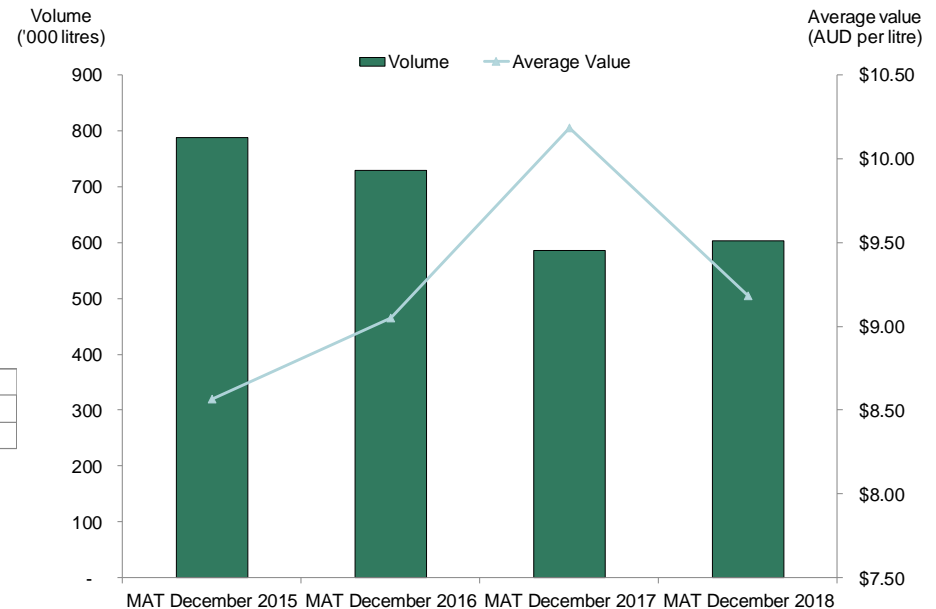
Overview

		MAT December 2017	MAT December 2018	Change
Red wine	Volume (litres)	345,885	269,494	-22%
	Value (AUD)	\$3,472,784	\$2,813,761	-19%
	Average value	\$10.04	\$10.44	4%
White wine	Volume (litres)	239,714	333,619	39%
	Value (AUD)	\$2,490,066	\$2,721,688	9%
	Average value	\$10.39	\$8.16	-21%
Total wine	Volume (litres)	586,490	603,437	3%
	Value (AUD)	\$5,973,054	\$5,540,844	-7%
	Average value	\$10.18	\$9.18	-10%

Total wine by price point



Total volume and average value

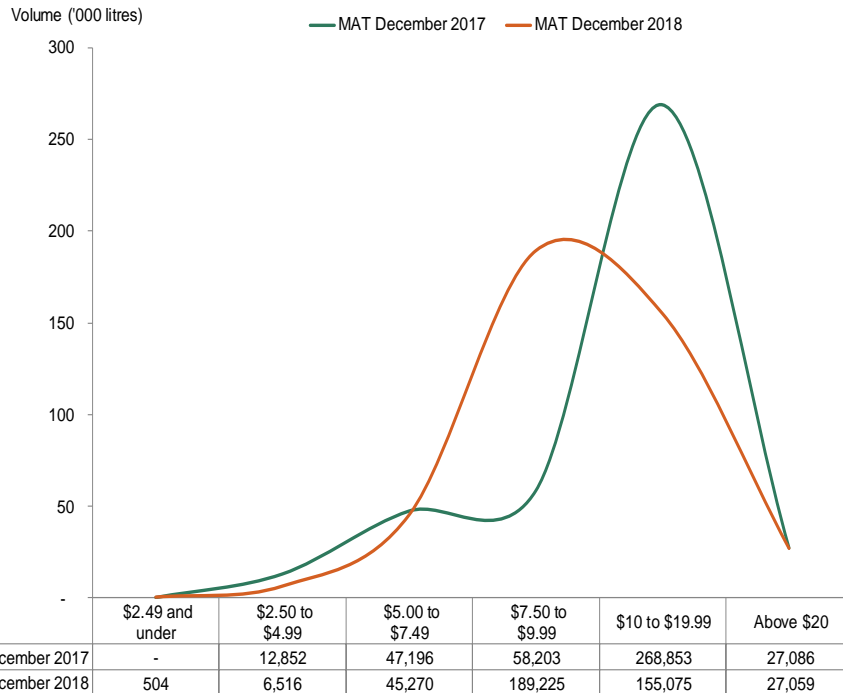


Bottled wine exports to United States Of America

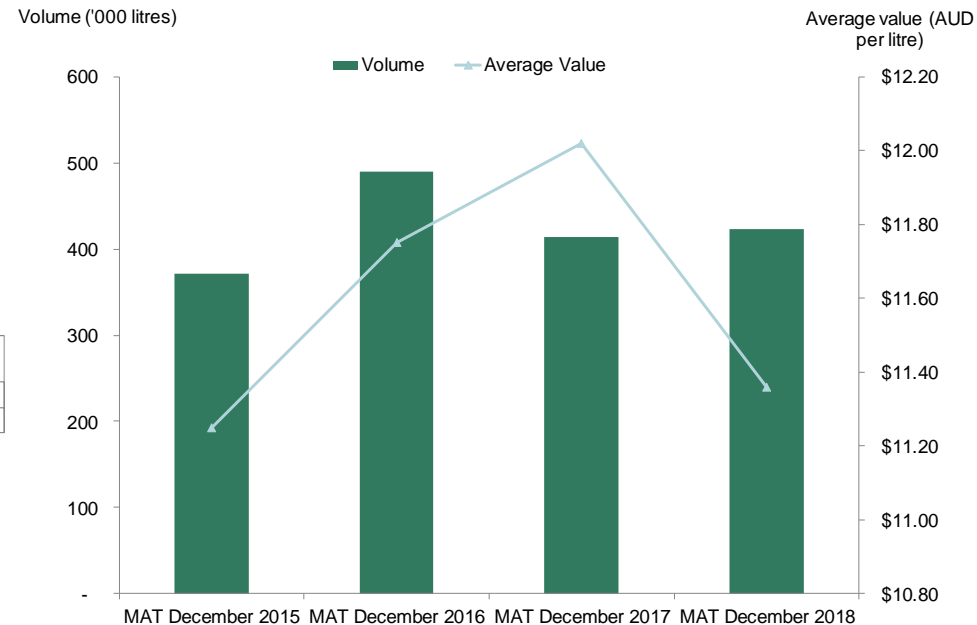
Overview

		MAT December 2017	MAT December 2018	Change
Red wine	Volume (litres)	161,933	163,854	1%
	Value (AUD)	\$1,996,854	\$2,058,807	3%
	Average value	\$12	\$13	2%
White wine	Volume (litres)	251,933	258,408	3%
	Value (AUD)	\$2,975,753	\$2,728,454	-8%
	Average value	\$11.81	\$10.56	-11%
Total wine	Volume (litres)	414,189	423,648	2%
	Value (AUD)	\$4,978,349	\$4,812,021	-3%
	Average value	\$12.02	\$11.36	-5%

Total wine by price point



Total volume and average value

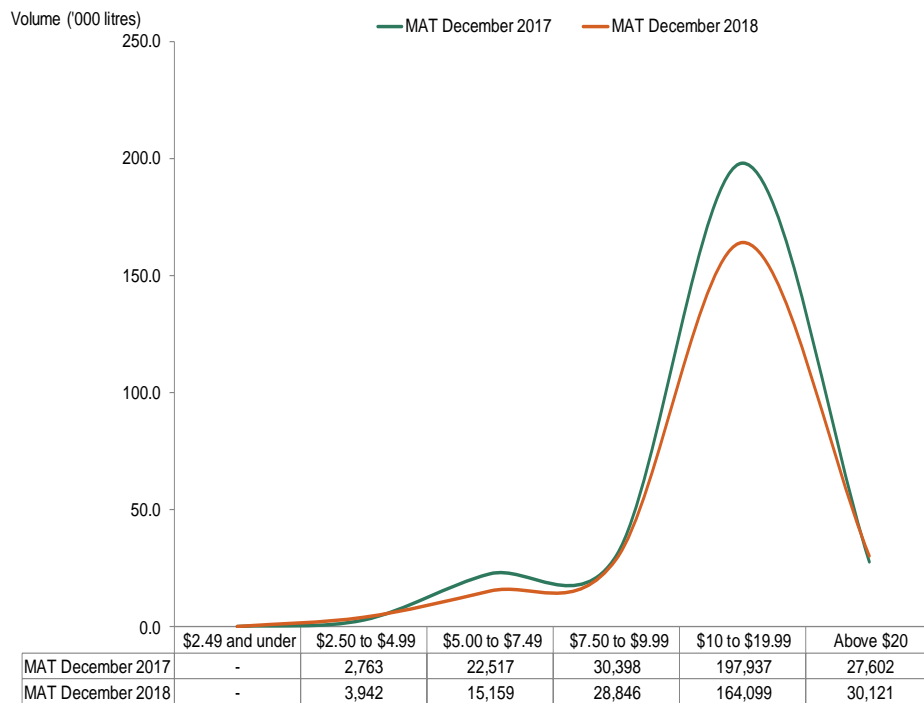


Bottled wine exports to Singapore

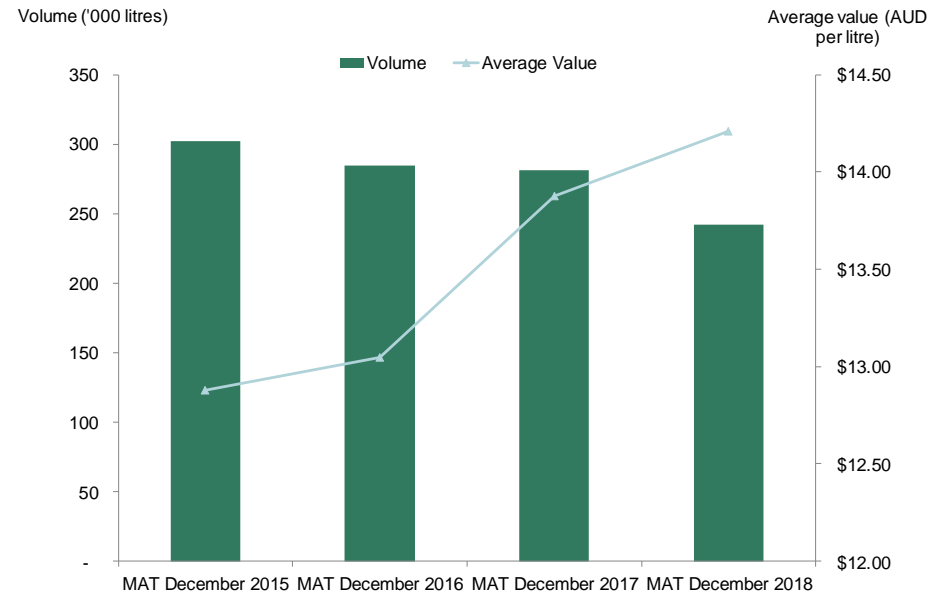
Overview

Total wine by price point

		MAT December 2017	MAT December 2018	Change
Red wine	Volume (litres)	168,978	137,637	-19%
	Value (AUD)	\$2,506,407	\$2,039,795	-19%
	Average value	\$14.83	\$14.82	0%
White wine	Volume (litres)	109,745	104,295	-5%
	Value (AUD)	\$1,367,369	\$1,398,132	2%
	Average value	\$12.46	\$13.41	8%
Total wine	Volume (litres)	281,216	242,166	-14%
	Value (AUD)	\$3,902,708	\$3,441,390	-12%
	Average value	\$13.88	\$14.21	2%



Total volume and average value



Notes and 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.

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

Notes and definitions continued

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.

Calculation of “overall state by state exports”:

- First, packaged wine that shows GI region of origin that can be attributed by state e.g. wines labelled as Mornington Peninsula will be allocated to Western Australia.
- Second, add packaged wine designated South Eastern Australia split by the share of crush for the 3 major warm inland regions of Riverland (SA), Murray Darling/Swan Hill (Vic) and Riverina and Murray Darling/Swan Hill (NSW) averaged over three years (at December 2018 this means SEA is split 41 per cent SA, 35 per cent NSW and 24 per cent Vic). The Vic share of Murray Darling/Swan Hill is 73%.
- Third, add packaged wine designated as ‘no label claim’ split by the share of crush by State averaged over three years (at December 2018 this means SA 49.7 per cent, NSW 26.7 per cent, Vic 20.9 per cent, WA 2.10 per cent, Qld 0.1 per cent and ACT and NT 0 (the vineyard areas of ACT fall into NSW).
- Fourth, add bulk wine by declared GI region of origin. The ‘South Eastern Australia’ component of bulk wine is split as per the second step.